



# **EMAIL MANAGER 3.6 SETUP GUIDE**

Rev. 1.5

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# 1 INTRODUCTION

This document contains instructions for the installation of FileNet Email Manager (eMgr). For each component required by Email Manager, the following sections may be included:

- **Pre-requisite Activities:** contains instructions for activities that must be performed prior to the actual installation of the software. These activities involve preparing the systems for the software and do not require any Email Manager components.
- **Installation:** contains instructions for installing Email Manager specific components.

## 1.1 Implementation Worksheet

To assist with the installation, an Implementation Worksheet on which information required for the installation can be recorded is provided in Appendix A. Throughout this guide you will see values highlighted in **bold** text. These bold typeface values should be entered in the appropriate location on the Implementation Worksheet. These bold types values will be referenced in the document as **bold** text.

Prior to beginning the installation, record the version numbers of the various software applications that will be used in the Implementation Worksheet in the section **Software Versions**.

## 1.2 Assumptions

The instructions in this Setup Guide assume the administrator installing the software is knowledgeable about Windows server administration, FileNet Content Services/Images Services /P8 Content Engine administration, either Microsoft Exchange or Lotus Domino administration and either Oracle or SQL Server administration.

## 1.3 New Features

The following is a summary of new features in Email Manager:

- **Duplicate Management:** the option to prevent items that have already been captured from being re-captured. Duplicate Management may be configured to work across multiple Email Manager servers. Duplicate Management currently only applies to emails and not attachments in an email.
- **PST Connector:** a source connector that will search for PST archive files and capture the content of the PST archive.
- **Retention of log files:** log files created by the system may be configured to be automatically deleted after a specific period.
- **Retention of temporary files:** temporary files created by the system may be retained for a specific period of time before being deleted.
- **Audit logs:** for each Source Server Connector, an audit log may be created that will indicate whether or not an item was successfully processed. The audit log may be configured to show specific properties of the item.
- **Automatic retrieval of shortcut items:** for emails that have been converted to shortcuts in a user's mailbox, using the Email Manager Client, the system may be configured to automatically retrieve the email from a P8 repository when it is opened by the user in the email client.

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- File System Repository: as an alternative to adding emails to a FileNet repository, the email may be placed into a folder on the file system. An XML file containing email metadata is also created to accompany each email file.
  - File document in more than one P8 folder: in an Index Template, the option to add a document to more than one P8 folder.
  - Create folder in a P8 repository: in an Index Template, the option to create a P8 folder if the folder specified does not already exist.
  - Dynamic assignment of folders: in an Index Template, the option to base the name of the folder that items will be added to on document properties, literal values, or regular expressions applied to document properties.
  - Add document to P8 as a minor version: the option to add a document to P8 as a “minor” version (as opposed to “major” version, which is the default).
  - Dynamic assignment of Records Manager classifications: the option to base the name of the Records Manager classification that items will be assigned to on document properties, literal values, or regular expressions applied to document properties.
  - Advanced regular expressions support: support for replace values in regular expressions, which allows for more advanced manipulation of matching text in an expression.
  - Flags to control whether items previously processed should be re-processed: in a Profile, the option to control whether or not items that have already been processed by a Profile should be reprocessed.
  - Option to turn off resolution of distribution lists: in Source Server Connectors, the option to turn off the resolution of users who are members of a distribution list that is used in an email recipient field (to/from/cc).
  - Email Connector advanced configuration options: in the Email Connector configuration screen, a section to configure advanced options has been added.
  - Capture outgoing email in Email Manager Client: option to prompt a user of the Email Manager Client to capture an email that is being sent. This option configurable by the end user.
  - Configuration Manager changes:
    - Separate section for configuration of each Source Server Connector (Exchange Connector, Lotus Connector and PST Connector).
    - Relationship between Repositories and Index Templates explicitly shown.
    - Relationship between Source Servers Connectors and Profiles explicitly shown.
    - Separate section for Client Configuration Options and Client Profiles

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## 2 SYSTEM REQUIREMENTS

The following sections describe the system requirements for Email Manager.

### 2.1.1 Dependant Systems Requirements

Email Manager requires a database server, an email server, an email client and a document repository. The following systems are supported by Email Manager.

#### Database

Database Server	Version(s)
Microsoft SQL Server	7.0, 2000
Oracle	8i, 9i, 10g

#### Email Server

Email Server	Version(s)
Microsoft Exchange Server	5.5, 2000, 2003
Lotus Domino	5.0.11 to 5.0.13, 6.0.2 to 6.5.1, 7.0

#### Email Client

Email Client	Version(s)
Outlook	2000, 2002, 2003
Lotus Notes	5.0.11 to 5.0.13, 6.0.2 to 6.5.1, 7.0

#### Document Repository

Document Repository Server	Version(s)
FileNet Content Services	5.2, 5.3, 5.4
FileNet Image Services	3.6, 4.0
FileNet P8 Content Engine	3.0, 3.5, 3.5.1
FileNet Records Manager	3.0a, 3.5  For Records Manager 3.5, no default permissions are granted for Records Classes. The permissions must be explicitly set, otherwise "access denied" error will occur when Email Manager attempts to declare a record. See the section Document Repository Configuration for details on how to configure Records Manager for use with Email Manager.

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## 2.1.2 Email Manager Server Requirements

The following software must be installed on the server Email Manager is installed on:

- Windows 2000 Pro, Windows 2000 Server, Windows XP Pro, Windows 2003 Server
- .Net Framework 1.1 required
- If Email Manager Web Services will be used (required for Email Manager Client integration), one of:
  - Internet Information Server 5.0
  - Internet Information Server 6.0
- If Exchange Server is being used as the email server, one of:
  - Outlook 2000 w/ CDO
  - Outlook 2002<sup>1</sup> w/ CDO
  - Outlook 2003 w/ CDO
- If Lotus Domino is being used as the email server, one of:
  - Lotus Notes 5.0.11 to 5.0.13
  - Lotus Notes 6.0.2 to 6.5.1
  - Lotus Notes 7.0
  - Note: to support DXL file and shortcut options, Lotus Notes 6.0.3 client or higher is required.
- If Oracle is being used as the database server, one of:
  - Oracle 8i Client
  - Oracle 9i Client
  - Oracle 10g Client
- If FileNet Content Services is being used as the document repository, one of:
  - Panagon Desktop 3.x and client libraries
  - Panagon Web 3.x and client libraries
- If FileNet Image Services is being used as the document repository:
  - Panagon Web 3.x and client libraries
- If FileNet P8 Content Engine is being used as the document repository:
  - FileNet P8 Content Engine COM SDK
  - FileNet P8 Client Connectivity
- If FileNet Records Manager is being used:
  - Java Platform Standard Edition 1.4.2

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<sup>1</sup> On the eMgr Server, Microsoft Office Service Pack 2 should not be installed. When using Service Pack 2, the eMgr Exchange Connector may not be able to establish a connection to the Exchange Server.

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## 2.1.3 Email Manager Client Requirements

The following software must be installed on the client machine Email Manager Client is installed on:

- Windows 2000 Pro, Windows XP Pro
- If Exchange Server is being used as the email server, one of:
  - Outlook 2000
  - Outlook 2002
  - Outlook 2003
- If Lotus Domino is being used as the email server, one of:
  - Lotus Notes 5.0.11 to 5.0.13<sup>2</sup>
  - Lotus Notes 6.0.2<sup>3</sup> to 6.5.1
  - Lotus Notes 7.0

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<sup>2</sup> To import DXL files (Lotus Notes native format for email), Lotus Notes 6.0.3 or higher is required. Only email in plain text format is supported for versions of Lotus Notes older than 6.0.3.

<sup>3</sup> To import DXL files (Lotus Notes native format for email), Lotus Notes 6.0.3 or higher is required. Only email in plain text format is supported for versions of Lotus Notes older than 6.0.3.

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## 3 BEFORE INSTALLING

The following activities should be performed before installing Email Manager server components.

Email Manager components should not be installed on a machine that is a domain controller. Some .Net and Web Services components may not function as expected on a domain controller.

If Email Manager for Exchange is being used, the server Email Manager is installed on must either be on the same domain as the Exchange Server or the domains should be configured such that an Outlook client on the Email Manager Server machine can connect to Exchange by using only NT authentication (in other words, a login prompt should not be shown when connecting to Exchange).

If P8 Content Engine is being used, the server Email Manager is installed on must be on the same domain as the P8 Content Engine server.

The setup required in this section assumes the administrator is knowledgeable about Windows server administration, Exchange/Lotus Notes administration, and FileNet CS/FileNet P8 Content Engine administration.

### 3.1 Document Repository Configuration

This section describes configuration required in the Document Repository to support Email Manager.

#### 3.1.1 FileNet Content Services

The setup required in this section assumes the administrator is knowledgeable about FileNet Content Services administration.

##### 3.1.1.1 Collect Library Information

In the Implementation Worksheet, enter the following information in the section **FileNet Content Services** under the settings specified.

1. Under **FileNet Content Services Version**, enter the version of Content Services being used.
2. Under **Panagon Desktop Version**, enter the version of Panagon Desktop being used.
3. Under **Operating System**, enter the name and version of the operating system Content Services resided on.
4. Under **Library System**, enter the library system name (library name)
5. Under **Library Server**, enter the name of the library server (host)

##### 3.1.1.2 Document Class/Custom Property Setup

Document classes and custom properties required are dependent on the business requirements for email indexing. Any document classes and custom properties required should be created prior to Email Manager setup and configuration. See the section APPENDIX B: DOCUMENT CLASS CONFIGURATION for suggestions for custom property configuration.

##### 3.1.1.3 User Creation

A user in the FileNet library needs to be created for Email Manager to use when adding email to the library. Create a user as follows:



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1. Using the CS Explorer, create a new user in the FileNet library. Ensure the user has the following attributes.
    - a. Add Item privileges
    - b. Author privileges for all folders in the system.
    - c. Member of Admin group.
    - d. "May Create Document" privileges on all document classes required for email.
  2. In the Implementation Worksheet, record the new user name in the section **FileNet Content Services** under the setting **Email Manager FileNet User**.

## 3.1.2 FileNet Image Services

The setup required in this section assumes the administrator is knowledgeable about FileNet Image Services administration.

### 3.1.2.1 Collect Library Information

In the Implementation Worksheet, enter the following information in the section **FileNet Image Services** under the settings specified.

6. Under **FileNet Image Services Version**, enter the version of Image Services being used.
7. Under **Panagon Web Version**, enter the version of Panagon Web being used.
8. Under **Operating System**, enter the name and version of the operating system Image Services resided on.
9. Under **Domain**, enter the library domain name
10. Under **Organization**, enter the name of the library organization

### 3.1.2.2 Document Class/Custom Property Setup

Document classes and custom properties required are dependent on the business requirements for email indexing. Any document classes and custom properties required should be created prior to Email Manager setup and configuration. See the section APPENDIX B: DOCUMENT CLASS CONFIGURATION for suggestions for custom property configuration

### 3.1.2.3 User Creation

A user in the FileNet library needs to be created for Email Manager to use when adding email to the library. Create a user as follows:

1. Ensure the user has permissions to add items to the library.
2. In the Implementation Worksheet, record the new user name in the section **FileNet Image Services** under the setting **Email Manager FileNet User**.

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### 3.1.3 FileNet P8 Content Engine

The setup required in this section assumes the administrator is knowledgeable about FileNet P8 Content Engine administration.

#### 3.1.3.1 Collect Library Information

In the Implementation Worksheet, enter the following information in the section **FileNet P8 Content Engine** under the settings specified.

1. Under **FileNet P8 Content Engine Version**, enter the version of Content Engine being used.
2. Under **Operating System**, enter the name and version of the operating system Content Engine resided on.
3. Under **Object Store**, enter the object store name (library name).
4. Under **Host Server**, enter the name of the server Content Engine resides on.

#### 3.1.3.2 Document Class/Custom Property Setup

Document classes and custom properties required are dependent on the business requirements for email indexing. Any document classes and custom properties required should be created prior to Email Manager setup and configuration. See the section APPENDIX B: DOCUMENT CLASS CONFIGURATION for suggestions for custom property configuration. Note that a document class named "Email" is created by default when Content Engine is installed. This document class may be utilized with Email Manager.

#### 3.1.3.3 User Creation

A P8 Content Engine user needs to be created for Email Manager to use when adding email to Content Engine. To add a document to an object store and file a document into a folder, the user minimally needs to be a part of one of the "Initial User Groups". The group must have "use object store" permissions (this is the default permissions the group is granted when the object store is created).

On the object store, the user must minimally have the following permissions:

- Use object store

On each document class that will be used with email manager, the user must minimally have the following permissions:

- Allow: View all properties
- Allow: Create instance
- Allow: Read permissions

If a file store will be used with the object store, the user must have "Full Control" over the file store share.

In the Implementation Worksheet, record the user name in the section **FileNet P8 Content Engine** under the setting **Email Manager FileNet User**.

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### 3.1.3.4 Records Manager Configuration

If Records Manager will be used, permissions on Record Classes must be explicitly set. The **FileNet P8 Content Engine User** must be **EXPLICITLY GRANTED RIGHTS TO ANY RECORD CLASSES THAT WILL BE USED**. Regardless of other permissions that the user may be granted in the object store (even P8 administrator privileges), the following instructions **MUST** be followed as **NO USERS ARE GRANTED REQUIRED PRIVILEGES TO RM RECORD CLASSES BY DEFAULT**:

1. In FileNet Enterprise Manager, select the File Plan Object Store that will be used.
2. Select the Record Class that will be used (i.e. Document Class->Record->Electronic Record->Email Record).
3. Right-click, select "Properties".
4. Open the "Default Instance Security" tab.
5. Give the **FileNet P8 Content Engine User** the same privileges as the #CREATOR- OWNER user (usually full control).
6. Repeat for each Record Class that will be used.

If custom properties are being added to a record class, the word "declare" must be added to the property's Description field. Each item that appears in the Description fields should be separated by a comma.

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## 3.2 Email Server Configuration

### 3.2.1 Exchange Server

#### 3.2.1.1 Collect Exchange Server Information

In the Implementation Worksheet, enter the following information in the section **Exchange Server** under the settings specified.

1. Under **Exchange Server Version** enter the version of Exchange Server being used and the service pack level.
2. Under **Operating System**, enter the name and version of the operating system the Exchange Server resides on.
3. Under **Exchange Server**, enter the name of the machine the Exchange Server resides on.

#### 3.2.1.2 Windows Domain User Configuration

A Windows domain user that will be used by the Exchange Connector needs to be created. Create a user as follows:

1. Create a domain user that will be used to run the Exchange Connector (i.e. eMgrservice). Minimally, the user must be assigned the following security privileges:
  - a. On the Mail Store(s) of the folders and mailboxes being monitored, the user must have “Administer Information Store” permissions.
  - b. For any Exchange public folders that Email Manager will monitor, the user must have “Publishing Editor” (monitored folder) and “Contributor” permissions.
  - c. “Full Control” on all folders on the machine the Exchange Connector is installed on.
2. Record the domain user id in the Implementation Worksheet in the **Windows Domain** section under the setting **Windows Domain User**. Under **Active Directory**, enter “Yes” if active directory is being used or “No” if active directory is not being used.
3. Create a mailbox on the **Exchange Server** for the **Windows Domain User**.
4. Record the name of the mailbox in the Implementation Worksheet in the **Exchange Server** section under the setting **Email Manager Exchange User**.

If the PST Connector will be used to search for PST Archive Files on network shares, the user will require the following additional permissions:

1. The user must be a member of the Domain Users group.
2. The user must have “Full Control” on any folders on the network share that will be searched for PST archives. This includes both user shares and default shares (i.e. C\$). In addition, to support the option to disable PST file creation on a computer, the user must have “Full Control” on the folder containing the MAPI configuration file (MAPISVC.INF). The file is typically located in “C:\Program Files\Common Files\System\Mapi\1033”.
3. If the option to search for PST files using the Outlook Profile is required, the user will require read access to “Software\Microsoft\Windows NT\CurrentVersion\Windows Messaging Subsystem\Profiles” for each “HKEY\_CURRENT\_USER” registry hive on each computer.

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## 3.2.2 Lotus Domino Server

### 3.2.2.1 Collect Domino Server Information

In the Implementation Worksheet, enter the following information in the section **Domino Server** under the settings specified.

1. Under **Domino Server Version** enter the version of Domino Server being used and the service pack level.
2. Under **Operating System**, enter the name and version of the operating system the Domino Server resides on.
3. Under **Domino Server Name**, enter the name of the Domino Server.
4. Under **Organization Name**, enter the name of the Organization the Domino Server belongs to.
5. Under **Domain Name**, enter the name of the Domain the Domino Server belongs to.

### 3.2.2.2 Windows Domain User Configuration

A Windows domain user that will be used by the Lotus Connector needs to be created. Create a user as follows:

1. Create a domain user that will be used to run the Lotus Connector (i.e. eMgrservice). Minimally, the user must be assigned the following security privileges:
  - a. "Full Control" on all folders on the machine the Lotus Connector is installed on.
  - b. The user must be able to access the Lotus Domino server Email Manager will connect to.
2. Record the domain user id in the Implementation Worksheet in the **Windows Domain** section under the setting **Windows Domain User**. Under **Active Directory**, enter "Yes" if active directory is being used or "No" if active directory is not being used.
3. Create a user on the **Domino Server** for the **Windows Domain User**. The user must minimally have "Editor", "Delete Documents" and "Replicate or Copy Documents" permissions in all mailboxes and other databases used with Email Manager. Note that the following "Editor" access level permissions are NOT required: "Create private agents", "Create personal folders/views", "Create shared folders/views" and "Create LotusScript/Java agents".
4. Record the name of the mailbox in the Implementation Worksheet in the **Lotus Domino Server** section under the setting **Email Manager Domino User**.

## 3.3 Email Manager Server Configuration

This section describes pre-requisite activities that need to be performed on the server that the Email Manager server components will be installed on.

### 3.3.1 Collect eMgr Server Information

In the Implementation Worksheet, enter the following information in the section **Email Manager Server** under the settings specified.

1. Under **Operating System**, enter the name and version of the operating system installed on the Email Manager Server.
2. Under **Email Manager Server Machine**, enter the name of the machine that will be used to the run the Email Manager Server

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## 3.3.2 Temporary Storage Folders

Two folders must be created on Email Manager **Server Machine** that will be utilized as temporary storage space and log files by the Email Manager Server components. The following names are suggested:

Temporary folder: C:\eMgr\_temp

Log File Folder: C:\eMgr\_logs

The folders should be created at the root level of the drive (i.e. c:\eMgr\_temp) and the default IIS user on **Email Manager Server Machine** (typically IUSR\_<machine\_name>) as well as **Windows Domain User** should have the following permissions on the folder:

- Modify
- Read & Execute
- List Folder Constraints

Record the paths for the folders in the Implementation Worksheet in the section **Email Manager Server** under **Temporary Folder** and **Log File Folder**.

If FileNet Content Services is being used, the default IIS User and **Windows Domain User** also require the same permissions on the following folders:

- The root folder of the temporary storage folder (i.e. if the temp folder is C:\eMgr\_temp, permissions need to be assigned to C:\).
- <drive>\Program Files\FileNet\Shared
- <drive>\Winnt\Temp
- <drive>\Winnt\System32

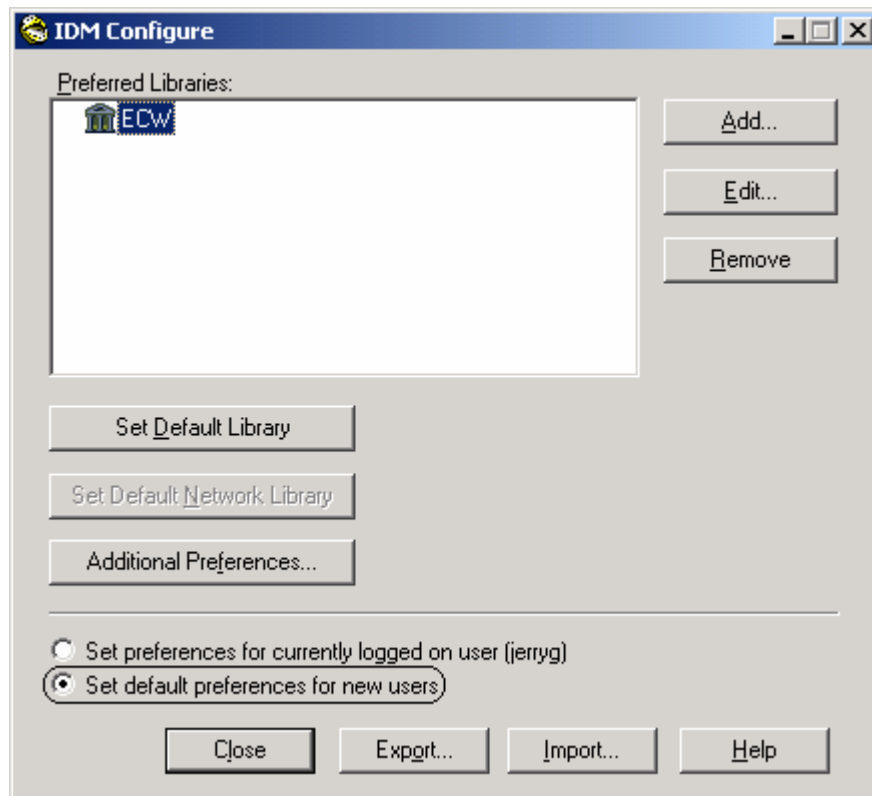
## 3.3.3 Document Repository Specific Configuration

### 3.3.3.1 FileNet Content Services

#### 3.3.3.1.1 Panagon Desktop Installation and Configuration

Panagon Desktop or Panagon Web is required by Email Manager Server components to allow for communication with FileNet libraries. Install and configure Panagon Desktop/Web as follows. Note that if Panagon Desktop/Web has been already been installed and configured on the machine, this setup should not be required.

1. Log into **Email Manager Server Machine** as a user who has permissions to install software on the machine.
2. Install either Panagon Desktop 3.x (including Panagon Client Libraries 5.x) or Panagon Web Services 3.x on the machine. The server will need to be rebooted to complete the installation.
3. Log into **Email Manager Server Machine** as a user who has permissions to install software on the machine.
4. Using the Panagon Configure utility, configure the library(s) that will be used to store email using the **Library System** and **Library Server** names. When creating the library, ensure the library is configured using the “Set default preferences for new users” option.



### 3.3.3.2 FileNet Image Services

#### 3.3.3.2.1 Panagon Web Installation and Configuration

Panagon Web is required by **Email Manager** Server components to allow for communication with FileNet Image Services libraries. Install and configure Panagon Web as follows. Note that if Panagon Web has been already been installed and configured on the machine, this setup should not be required.

5. Log into **Email Manager Server Machine** as a user who has permissions to install software on the machine.
6. Install Panagon Web Services 3.x (including Panagon Client Libraries 5.x required to access the version of Images Services being used) on the machine.
7. Using the Panagon Configure utility, configure the library(s) that will be used to store email using the **Domain** and **Organization** names for the IS library. When creating the library, ensure the library is configured using the “Set default preferences for new users” option.

### 3.3.3.3 FileNet P8 Content Engine

#### 3.3.3.3.1 P8 CE Client Tools Installation and Configuration

P8 CE client connectivity tools and the P8 COM SDK are required by Email Manager components to allow for communication with FileNet P8 CE object stores. Install and configure the P8 CE components as follows. Note that if the P8 CE components have already been installed and configured on the machine, this setup should not be required.

1. Log into **Email Manager Server Machine** as a user who has permissions to install software on the machine.
2. Install FileNet P8 Client Connectivity and Content Engine SDK.
3. Configure P8 to connect to the P8 Content Engine server.

## 3.3.4 Email Server Specific Configuration

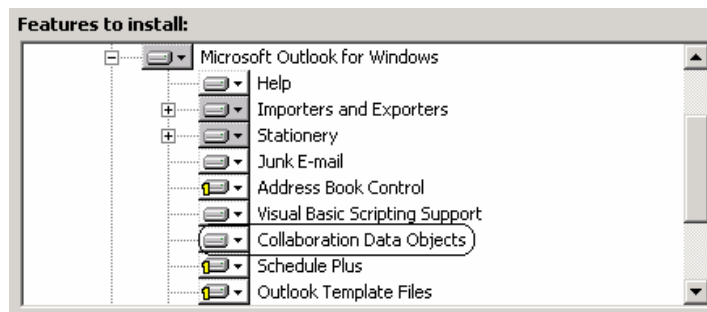
### 3.3.4.1 Exchange Server

#### 3.3.4.1.1 Outlook Installation and Configuration

The Email Manager Server requires components of Outlook to connect to the Exchange Server. Outlook installs CDO components required by the Exchange Connector. Outlook must be installed on the **Email Manager Server Machine** and configured for the **Email Manager Exchange User**.

Install and configure Outlook on **Email Manager Server Machine** as follows:

1. Log into **Email Manager Server Machine** as a user who has permissions to install software on the machine.
2. Install Microsoft Outlook. Ensure that the custom installation is used and that *Collaborative Data Objects* is selected in the setup screen.



3. Log into **Email Manager Server Machine** as **Windows Domain User**.
4. Create an Outlook Profile for **Email Manager Exchange User** and give it a name such as "Email Manager User".

#### 3.3.4.1.2 Public Folder Creation

The Email Manager Exchange Connector monitors public folders in Exchange Server for emails. Emails that arrive in a public folder are processed by Email Manager and added to the document library. The public folders that need to be created are dependent upon the requirements for the implementation.

Public folders that are created must have the following attributes:

- The folder should be created under `Public Folders\All Public Folders`
- **Email Manager Exchange User** must have Owner permissions on the folder
  - If the folder is being created for use by the Email Manager Client, all users require Author privileges on the folder.
  - If the folder is being created for use for a rules bases system, only **Email Manager Exchange User** requires access to the folder



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The following instructions are a guideline for creating the folders. The actual folders created will depend upon whether rules based capture or end user capture is required.

If the Email Manager Client will be utilized, create a public folder that will be utilized by the Email Manager Client as follows:

1. Log into **Email Manager Server Machine** as **Windows Domain User**.
2. Open Outlook using the profile **Outlook Profile Name** for **Email Manager Exchange User**
3. Under `Public Folders\All Public Folders` create a new public folder. Give the public folder a name such as "Email Manager Client". The public folder may be created as a subfolder of another folder. Record the public folder name (prefixed by the names of any "parent" folders, not including `Public Folders\All Public Folders`) in the Implementation Worksheet in the section **Exchange Server** under **Public Folder for Email Manager Client**.
4. Grant the folder the following permissions:
  - a. Ensure **Email Manager Exchange User** has been given "Owner" permissions by default.
  - b. Minimally, give all other users "Contributor" access to the folder.

If email will be added to the document library based on a rules based system, create a public folder as follows:

1. Log into **Email Manager Server Machine** as **Windows Domain User**.
2. Open Outlook using the profile **Outlook Profile Name** for **Email Manager Exchange User**
3. Under `Public Folders\All Public Folders` create a new public folder. Give the public folder a name such as "Email Manager Rules". The public folder may be created as a subfolder of another folder. Record the public folder name (prefixed by the names of any "parent" folders, not including `Public Folders\All Public Folders`) in the Implementation Worksheet in the section **Exchange Server** under **Public Folder(s) for Email Manager Rules**.
4. Grant the folder the following permissions:
  - a. Ensure **Email Manager Exchange User** has been given "Owner" permissions by default.
  - b. If this folder is being used as the Message Journaling folder (see below), no other user's require access to the folder.
  - c. If user's will be dragging and dropping email into the folder, "Contributor" access must be granted to required users and groups. Optionally, the "Folder Visible" option may be de-selected to prevent users from seeing the contents of the folder.

Email Manager may be configured to monitor all sub-folder of a public folder. All sub-folders should be granted the same permissions as the parent folder.

Note that it may be necessary to enable Message Journaling on the Exchange Server to take full advantage of a rules based system. See the section APPENDIX C: EMAIL SERVER MESSAGE JOURNALING CONFIGURATION for details on enabling Message Journaling.

To verify that the public folders have been configured correctly, do the following:

1. Log into **Email Manager Server Machine** as **Windows Domain User**.
2. Ensure the **Email Manager** services are not running.
3. Open Outlook.
4. Drag and drop email messages from the Inbox into **Public Folder for Email Manager Client** as well as **Public Folder(s) for Email Manager Rules**. If errors occur, folder permissions may be incorrect.

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5. Navigate to **Public Folder for Email Manager Client** and view the contents of the folder. The email message dragged from the Inbox should appear in the folder. If it does not, the folder permissions may be incorrect.
  6. Attempt to delete the email message in **Public Folder for Email Manager Client**. If the email cannot be deleted, the folder permissions may be incorrect.
  7. Repeat steps 3 to 5 for **Public Folder(s) for Email Manager Rules**.
  8. Login into a client workstation as an end user. The workstation should have Outlook installed on it and configured to access the **Exchange Server**.
  9. Open Outlook.
  10. Drag and drop email messages from the Inbox into **Public Folder for Email Manager Client** as well as **Public Folder(s) for Email Manager Rules**. If errors occur, folder permissions may be incorrect.
  11. Drag and drop email messages that have attachments from the Inbox into **Public Folder for Email Manager Client** as well as **Public Folder(s) for Email Manager Rules** (if drag and drop capture is being implemented). If errors occur, folder permissions may be incorrect.

**Note:** This test is only to be used for verifying whether public folder permissions have been configured correctly. The procedures described above should not be used when the Email Manager services are running as system errors may occur.

### 3.3.4.2 Lotus Domino

#### 3.3.4.2.1 Lotus Notes Installation and Configuration

The Email Manager Server requires components installed by Lotus Notes to connect to the Domino Server. Lotus Notes must be installed on the **Email Manager Server Machine** and configured for the **Email Manager Domino User**.

Install and configure Lotus Notes on **Email Manager Server Machine** as follows:

1. Log into **Email Manager Server Machine** as a user who has permissions to install software on the machine.
2. Install Lotus Notes.
3. The Lotus Notes API required by **Email Manager** is not registered by default and must be manually registered as follows:
  - a. Open a command prompt window.
  - b. Change the folder the folder Lotus Notes is installed in (by default it will be <drive>:\Program Files\lotus\notes)
  - c. Register the DLL nlsxbe.dll:

```
regsvr32 nlsxbe.dll
```
4. Log into **Email Manager Server Machine** as **Windows Domain User**.
5. Configure Lotus Notes to connect to the Domino server as **Email Manager Domino User**.
6. Create a temporary "cache" database on the local machine for the Lotus Connector to use. The cache database is used as temporary workspace when creating shortcut links, removing attachments and truncating messages. It also stores temporary diagnostic information and information on items that cause errors during processing. The database may be used when troubleshooting issues with the Lotus Connector. See APPENDIX I: Lotus Connector Cache

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Database Codes for a list of status codes that are written to the database. Create the database as follows:

- a. From the Lotus Notes menu choose "File-Database-New..." The New Database dialog will show. Enter the following values:
- b. In the "Specify New Database Name and Location" section, enter the following information:
  - i. In the Server combo-box, choose the server "Local"
  - ii. In the Title textbox, enter "Cache".
  - iii. In the File name textbox, enter eMgr\cache.nsf.
- c. In the "Specify Template for New Database" section, enter the following information:
  - i. In the Server combo-box, choose the server "Local"
  - ii. In the Template list, select the template "Blank"<sup>4</sup>.
- d. The **Email Manager Domino User** should be have "Editor", "Delete Documents" and "Replicate or Copy Documents" access to the database eMgr\cache.nsf
- e. Click "OK".

In the situation where a high volume of email will be processed, creating the "cache" database on the Domino Server may help improve performance. If the "cache" database is located somewhere other than the default location specified above, update in the Cache Server and Cache Database Path in Email Manager Configuration Manager (in the Advanced Options in the Lotus Connector Configuration screen). If multiple Email Manager servers will be used, each server should have it's own cache database to avoid potential conflicts.

#### 3.3.4.2.2 Database Creation

The Email Manager Lotus Connector monitors databases in Domino Server for emails. Emails that arrive in a database are processed by Email Manager and added to the document library. The databases that need to be created are dependent upon the requirements for the implementation.

Databases that are created for use by Email Manager should have the following attributes:

- **Email Manager Domino User** must have "Editor", "Delete Documents" and "Replicate or Copy Documents" permissions on the database
  - If the database is being created for use by the Email Manager Client, all users who will be using the client require "Depositor" permissions on the database. This could be implemented by creating an "Email Manager" group in Domino, assigning "Depository" permissions to the group and adding all required users to the group.
  - If Email Manager will be required to monitor mailboxes or perform any processing options in mailboxes (i.e. icon change or create shortcuts), "Editor" permissions must be granted to the **Email Manager Domino User** for each mailbox. In addition, if **Email Manager Domino User** will be required to delete items from mailboxes, "Delete Documents" and "Replicate or Copy Documents" permissions are required.
  - If the database is being created for use for a rules based system, only **Email Manager Domino User** requires access to the database

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<sup>4</sup> A Cache Database template is included in the eMgr installation package and may be utilized as the template for the cache.nsf database. Use of the template is optional but highly recommended to assist with system troubleshooting. See APPENDIX E: Email Manager Lotus Notes Templates for details.

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The following instructions are a guideline for creating the databases. The actual databases created will depend upon whether rules based capture or end user capture is required.

If the Email Manager Client will be utilized, create a database that will be utilized by the Email Manager Client as follows:

1. Log into **Email Manager Server Machine** as **Windows Domain User**.
2. Open Lotus Notes and login as **Email Manager Domino User**
3. From the Lotus Notes menu choose "File-Database-New..."
4. The New Database dialog will show. Enter the following values:
5. In the "Specify New Database Name and Location" section, enter the following information:
  - a. In the Server combo-box, choose the Domino server.
  - b. In the Title textbox, enter a name for the database (i.e "Email Manager Client Database")
  - c. In the File name textbox, enter a filename for the database (i.e. eMgr\emgrclient.nsf). Record the filename in the Implementation Worksheet in the section **Domino Server** under **Database for Email Manager Client**.
6. In the "Specify Template for New Database" section, enter the following information:
  - a. In the Server combo-box, choose the Domino server
  - b. In the Template list, select the template "Blank"<sup>5</sup>.
7. Click "OK".
8. Grant the following permissions for the database:
  - a. Ensure **Email Manager Domino User** has been given "Editor", "Delete Documents" and "Replicate or Copy Documents" permissions.
  - b. All users who will be using the client require "Depositor" permissions on the database.

If email will be added to the document library based on a rules based system, create a database as follows:

1. Log into **Email Manager Server Machine** as **Windows Domain User**.
2. Open Lotus Notes and login as **Email Manager Domino User**
3. From the Lotus Notes menu choose "File-Database-New..."
4. The New Database dialog will show. Enter the following values:
  - a. In the "Specify New Database Name and Location" section, enter the following information:
    - i. In the Server combo-box, choose the Domino server.
    - ii. In the Title textbox, enter name for the database (i.e "**Email Manager** Capture Database").
    - iii. In the File name textbox, enter a filename for the database (i.e. eMgr\emgrcap.nsf). Record the filename in the Implementation Worksheet in the section **Domino Server** under **Database for Rules**.
  - b. In the "Specify Template for New Database" section, enter the following information:

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<sup>5</sup> An eMgr Client database template is included in the eMgr installation package and may be utilized as the template for the client database. Use of the template is optional.

- 
- i. In the Server combo-box, choose the Domino Server.
      - ii. In the Template list, select the template "Mail (R6)" or "Mail (R5)"<sup>6</sup>.
    - c. Click "OK".
    - c. Grant the following permissions for the database:
      1. Ensure **Email Manager Domino User** has been given "Editor", "Delete Documents" and "Replicate or Copy Documents" permissions.
  5. Make the database a "mail-in" database as follows:
    - a. In the Start Menu, select Programs -> Lotus Applications -> Lotus Domino Administrator.
    - b. Select the Domain tab.
    - c. Select the People and Groups Tab.
    - d. Navigate the tree "Domino Directories, <Domain> Address Book, Mail-in Databases\_Resources"
    - e. Click on the "Add Mail-In Database" button.
    - f. In the Mail-In Database screen Basics tab, enter the following information:
      - i. Mail-in name: <enter a name>.
      - ii. Description <enter a description>
      - iii. Internet Address: <enter an internet address for the location>
      - iv. Domain: <enter the domain the database resides in>
      - v. Server: <enter the name of the server the database resides on>
      - vi. Filename: <enter the filename for **Database for Rules**>.
    - g. Click on the Save and Close button.

Note that it may be necessary to enable Message Journaling on the Domino Server to take full advantage of a rules based system. See the section APPENDIX C: EMAIL SERVER MESSAGE JOURNALING CONFIGURATION for details on enabling Message Journaling.

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<sup>6</sup> An eMgr rules capture database template is included in the eMgr installation package and may be utilized as the template for the client database. Use of the template is optional.

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### 3.3.5 .Net Configuration

Ensure that Internet Information Server is installed on the machine. If it is not, it must be installed on the **Email Manager Server Machine** prior to .Net Framework installation. Also, if FileNet Content Services or Image Services is being used .Net should be installed **after** configuring Panagon Desktop/Web. If it is not, the default .Net user (ASPNET) may not be able to access the FileNet library information. If this is the case, the user that .Net is using may need to be changed to a domain user for whom the required Panagon Libraries have been configured on the machine. See APPENDIX F: CHANGING .NET USER for details how to change the default user for .Net.

Install .Net framework as follows:

1. Log into **Email Manager Server Machine** as a user who has permissions to install software on the machine.
2. Install Microsoft .Net Framework 1.1 (.Net Framework may be obtained from <http://windowsupdate.microsoft.com>).
3. If using P8 Content Engine, update the .Net user to be the **Windows Domain User**. See APPENDIX F: CHANGING .NET USER for details how to change the default user for .Net. This is required to allow the Email Manager Web Services to connect to P8 Content Engine Object Stores.

### 3.3.6 Oracle Client Configuration

If Oracle is being used as the database for Email Manager, Oracle Client tools must be installed on the **Email Manager Server Machine**. In addition, the Oracle Client must be configured to allow the Oracle Client to connect to the Oracle database. In the Implementation Worksheet, in the section **Oracle Server**, in the field **Host String**, record the name of the host string that should be used to connect to the Oracle Server.

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## 3.4 Database Configuration

This section describes the configuration required on the database server to support Email Manager.

### 3.4.1 SQL Server Configuration

The setup required in this section assumes the administrator is knowledgeable about SQL Server administration. Note that SQL Server must be installed in “mixed mode” for use by Email Manager.

#### 3.4.1.1 Collect SQL Server Information

In the Implementation Worksheet, enter the following information in the section **SQL Server** under the settings specified.

1. Under **Operating System**, enter the name and version of the operating system the SQL Server resided on.
2. Under **SQL Server Name**, enter the name of the SQL Server.
3. Under **SQL Server IP**, record the IP address of the SQL Server.

#### 3.4.1.2 SQL Server Database and User

Email Manager uses Microsoft SQL Server to store various configuration settings and data.

The following SQL Server configuration is required on the SQL Server that will be used by Email Manager:

1. Create a new database for Email Manager to use. Record the name of the database in the Implementation Worksheet in the section **SQL Server** under **Database**.
2. Create a user for Email Manager to use to connect to the database. Record the user name in the Implementation Worksheet in the section **SQL Server** under **Email Manager SQL User**.
  - a. Set the user's default database to **Database**.
  - b. Grant the user read and write privileges (`db_datareader` and `db_datawriter`) in **Database**.

### 3.4.2 Oracle Configuration

The setup required in this section assumes the administrator is knowledgeable about Oracle administration.

#### 3.4.2.1 Collect Oracle Information

In the Implementation Worksheet, enter the following information in the section **Oracle Server** under the settings specified.

1. Under **Operating System**, enter the name and version of the operating system the SQL Server resided on.
2. Under **Host**, enter the name of the Oracle host.
3. Under **Port**, enter the port used by Oracle.
4. Under **SID**, enter the SID of the Oracle database.

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### 3.4.2.2 Oracle Database and User

Email Manager uses Oracle to store various configuration settings and data.

The following Oracle configuration is required on the Oracle database that will be used by Email Manager:

1. Create a user for Email Manager to use to connect to the database. Record the user name in the Implementation Worksheet in the section **Oracle Server** under **Email Manager Oracle User**.
  - a. Grant the user read, write and table creation privileges in **Database**.



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## 4 INSTALLATION

### 4.1 Database Setup

This section describes the installation of Email Manager database components.

#### 4.1.1 SQL Server

After the database has been created, the database objects required by Email Manager must be created. To setup the Email Manager Database, do the following:

1. Open SQL Server Query Analyzer and connect to the **Database** as an administrative user.
2. Depending on the email server and document repository being used, run the appropriate scripts to create the database objects required by Email Manager. Ensure that scripts are run in the **Database** created specifically for Email Manager. The scripts can be found in the `Database Scripts` folder on the distribution media (see the table below for the exact location of the required scripts).
  - a. Run the required database script.

The database scripts required for the email server and repository being used can be found in the Database Scripts folder in the Email Manager distribution package. Refer to the table below to determine which database script is required.

Email Server	Repository	File Name
Exchange Server	FileNet Content Services	db_sql_exch_cs.sql
Exchange Server	FileNet P8 Content Engine	db_sql_exch_p8.sql
Exchange Server	FileNet Image Services	db_sql_exch_is.sql
Lotus Notes	FileNet Content Services	db_sql_lotus_cs.sql
Lotus Notes	FileNet P8 Content Engine	db_sql_lotus_p8.sql
Lotus Notes	FileNet Image Services	db_sql_lotus_is.sql

If Email Manager is being installed for use with a Content Services system that has been upgraded from Content Services 4.x, it will be necessary to create an additional database record to specify what Content Services custom property refers to the document class. Please contact Email Manager support for details on creating this record.

#### 4.1.2 Oracle

After the database has been created, the database objects required by Email Manager must be created. To setup the Email Manager Database, do the following:

3. Open Oracle SQL \*Plus and connect to the **Database** as **Email Manager Oracle User**.
4. Depending on the email server and document repository being used, run the appropriate scripts to create the database objects required by Email Manager. The scripts can be found in the

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Database Scripts folder on the distribution media (see the table below for the exact location of the required scripts).

- a. Run the required database script.

The database scripts required for the email server and repository being used can be found in the Database Scripts folder in the Email Manager distribution package. Refer to the table below to determine which database script is required.

Email Server	Repository	File Name
Exchange Server	FileNet Content Services	db_ora_exch_cs.sql
Exchange Server	FileNet P8 Content Engine	db_ora_exch_p8.sql
Exchange Server	FileNet Image Services	db_ora_exch_is.sql
Lotus Notes	FileNet Content Services	db_ora_lotus_cs.sql
Lotus Notes	FileNet P8 Content Engine	db_ora_lotus_p8.sql
Lotus Notes	FileNet Image Services	db_ora_lotus_is.sql

If Email Manager is being installed for use with a Content Services system that has been upgraded from Content Services 4.x, it will be necessary to create an additional database record to specify what Content Services custom property refers to the document class. Please contact Email Manager support for details on creating this record.

## 4.2 Install Required Components

Install the required Email Manager components as follows:

1. Log into **Email Manager Server Machine** as a user who has permissions to install software on the machine.
2. Run the file `setup.exe` located in the `eMgr Server` folder on the Email Manager distribution media.
3. In the Welcome screen click `Next`.
4. In the License Agreement screen, if you agree with terms in the license, select the “I accept the term in the license agreement” radio button and click `Next`.
5. In the Customer Information screen, update customer information as required. Click `Next`.
6. In the Server Options screen, select the Source Server Type, FileNet Repository Type and Database Type being used.
7. In the Setup Type screen, select `Complete` if typical settings are required or `Custom` if any items need to be removed or added to the installation and click `Next`.
8. If `Custom` was selected as the Setup Type, in the Custom Setup screen, select the components to install. Click `Next` to continue.
9. Click `Finish` to begin the installation.

Note if performing a “custom” installation, if the default installation path is changed, do not use a “(“ character in the installation path. This may cause problems when using Oracle with Email Manager.

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**If FileNet Records Manger will be utilized with Email Manager, the following additional configuration is required:**

1. From the machine Records Manager is installed on, copy the folder `WEB-INF` to the **Email Manager Server Machine**. This folder contains the RM Java API and configuration settings for the RM installation. On the RM installation machine, this folder is typically found in the folder:  
`C:\Program Files\FileNet\RecordsManager`
2. On the **Email Manager Server Machine**, install Java Platform Standard Edition 1.4.2 (available from [java.sun.com](http://java.sun.com)).
3. On the **Email Manager Server Machine**, open regedit and set the following registry key to the location of the RM Java API on the local machine. Do this as follows:
  - i. Browse to the registry key:

`HKEY_LOCAL_MACHINE\SOFTWARE\FileNET\eMgr\3.6\Settings\RMWrapper`

- ii. Set the value `RMPATH` to the full path of the RM Java API. The RM Java API is located in a sub folder of `WEB-INF` called `lib`. If the `WEB-INF` folder was copied to `C:\WEB-INF`, set the registry key to: `C:\WEB-INF\lib`.
4. The **FileNet P8 Content Engine User** must be **EXPLICITLY GRANTED RIGHTS TO ANY RECORD CLASSES THAT WILL BE USED**. Regardless of other permissions that the user may be granted in the object store (even P8 administrator privileges), the following instructions **MUST** be followed as **NO USERS ARE GRANTED REQUIRED PRIVILEGES TO RM RECORD CLASSES BY DEFAULT**:
  - i. In FileNet Enterprise Manager, select the File Plan Object Store that will be used.
  - ii. Select the Record Class that will be used (i.e. Document Class->Record->Electronic Record->Email Record).
  - iii. Right-click, select "Properties".
  - iv. Open the "Default Instance Security" tab.
  - v. Give the **FileNet P8 Content Engine User** the same privileges as the `#CREATOR-OWNER` user (usually full control).
  - vi. Repeat for each Record Class that will be used.

## 4.3 Email Manager Server Setup

### 4.3.1 Configuration

Before using the Email Manager Server, the application must be registered and configured using the Email Manager Configuration Manager. The following is a brief overview of the settings that need to be configured in the Email Manager Configuration Manager. For a more detailed explanation on how to use the Email Manager Configuration Manager see the Email Manager Configuration Manager User Guide.

1. Login to **Email Manager Server Machine** as **Windows Domain User**.
2. Open the Email Manager Configuration Manager (select eMgr Configuration Manager in the menu Start -> Programs -> FileNet Email Manager 3.6 -> Server).
3. If the Email Manager Configuration Manager is being run for the first time, a prompt asking for database connection information will show.
  - a. In the Database Type combo box, select the database server being used (either Microsoft SQL Server or Oracle).
  - b. For SQL Server, enter the following information:
    - i. In Server, enter **SQL Server Name**.

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- ii. In the User Name field enter **Email Manager SQL User** name.
      - iii. In Password, enter the password for **Email Manager SQL User**.
      - iv. Click the button Refresh to retrieve a list of databases.
      - v. Select **Database** from the database list.
    - c. For Oracle, enter the following information:
      - i. In Services, enter **Host String**.
      - ii. In the User Name field enter **Email Manager Oracle User** name.
      - iii. In Password, enter the password for **Email Manager Oracle User**.
    - d. Click Ok to continue. The **Email Manager** Configuration Manager application will open.
  4. Right click on Rules in the tree and select New Rule to create a new Rule. Create any rules required.
  5. In the Repositories and Index Templates section, right click on the repository type of the repository being used, and select New Repository to register a repository for use with Email Manager.
    - a. In the New Repository Connection screen, select a repository from the Repository list box.
    - b. In the User field, enter the value of **Email Manager FileNet User**.
    - c. In the Password and Confirm Password fields, enter the password for **Email Manager FileNet User**.
    - d. If shortcut functionality will be used, in the URL field, update the <server\_name> in the URL to match the name of the server Workplace or Panagon Web Services reside on.
    - e. Click Ok to save the Repository Connection settings.
  6. In the Repositories and Index Templates section, below the repository registered for use with Email Manager, right click on Index Template and select New Index Template to add a new Index Template. Index Templates are used to specify how an item will be classified in the repository.
  7. In the Source Servers and Profiles section, right click on the email server type being used and select Edit to update general configuration setting related to the email server type. See the Configuration Manager User Guide for further details on this section.
  8. In the Source Servers and Profiles section, right click on the email server type being used and select New Source Server to register an email server for use with Email Manager.
    - a. For Exchange Server, in the Exchange Server Name field, enter **Exchange Server** (in the Worksheet in the **Exchange Server** section). If the Email Manager Client will be used, in the Public Folder for Client field, enter the **Public Folder for Email Manager Client** (in the Worksheet in the **Exchange Server** section). Click Ok
    - b. For Lotus Domino, in the Domino Server Name field, enter **Domino Server Name** (in the Worksheet in the **Lotus Domino Server** section). If the Email Manager Client will be used, in the Database for Client field, enter the path of the **Database for Email Manager Client** (in the Worksheet in the **Lotus Domino Server** section). Click Ok
  9. In the Source Servers and Profiles section, below the email server registered for use with Email Manager, right click on Profiles and select New Profile to add a new Profile. The Profile is used to specify what location on the email server will be monitored, what rules will be applied to determine what items to capture, and what index template should be used to index an item.

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## 4.3.2 Starting the Services

Once the Email Manager Server has been configured, the Email Manager related services can be started. Do the following to start the services:

1. Go to Start -> Settings -> Control Panel -> Administrative Tool -> Services.
2. If Email Manager for Exchange has been installed, do the following:
  - a. Open the properties screen for the Service “eMgr Exchange Connector”.
  - b. Go to the “Log On” tab.
  - c. Click on the “This account:” radio button, and enter **Windows Domain User** as the Logon User. Also fill in the password for this account.
  - d. If the service is to be started automatically when the machine is restarted, select “Automatic” in the “Startup Type” drop down box.<sup>7</sup>
  - e. Click OK.
3. If Email Manager for Lotus Domino has been installed, do the following:
  - a. Open the properties screen for the Service “eMgr Lotus Connector”.
  - b. Go to the “Log On” tab.
  - c. Click on the “This account:” radio button, and enter **Windows Domain User** as the Logon User. Also fill in the password for this account.
  - d. If the service is to be started automatically when the machine is restarted, select “Automatic” in the “Startup Type” drop down box.<sup>8</sup>
  - e. Click OK.
4. If Email Manager for PST capture has been installed, do the following:
  - a. Open the properties screen for the Service “eMgr PST Connector”.
  - b. Go to the “Log On” tab.
  - c. Click on the “This account:” radio button, and enter **Windows Domain User** as the Logon User. Also fill in the password for this account.
  - d. If the service is to be started automatically when the machine is restarted, select “Automatic” in the “Startup Type” drop down box.<sup>9</sup>
  - e. Click OK.
5. For Content Services and Image Services installations, in most cases the service “Email Manager Universal File Importer” will function correctly when using the default “Local System” user for the service. For P8 CE installation, the service must be updated to run as a domain user who is on the same domain as the P8 CE server. To change the service user, do the following:
  - a. Open the properties for the Service “YTG Universal File Importer”.
  - b. Go to the “Log On” tab.

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<sup>7</sup> If the services only need to be enabled during specific times, the Windows “net start” command may be used in conjunction with Windows Scheduler to schedule start times for the services.

<sup>8</sup> If the services only need to be enabled during specific times, the Windows “net start” command may be used in conjunction with Windows Scheduler to schedule start times for the services.

<sup>9</sup> If the services only need to be enabled during specific times, the Windows “net start” command may be used in conjunction with Windows Scheduler to schedule start times for the services.

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- c. Click on the “This account:” radio button, and enter **Windows Domain User** as the Logon User. Also fill in the password for this account.
  - d. If the service is to be started automatically when the machine is restarted, select “Automatic” in the “Startup Type” drop down box.
  - e. Click OK.
6. Start the services (either Email Manager Exchange Connector or Email Manager Lotus Connector, and Email Manager Universal File Importer).
  7. To verify that the services started properly, check the log files in the log files folders specified in the Email Manager Configuration Manager. The following files should be checked:
    - a. If Email Manager for Exchange has been installed, check the Exchange Connector log file for messages. The name of the log file is `exchconn<date>.log`.
    - b. If Email Manager for Lotus Domino has been installed, check the Lotus Connector log file for messages. The name of the log file is `lotusconn<date>.log`.
    - c. If Email Manager for PST capture has been installed, check the PST Connector log file for messages. The name of the log file is `pstscconn<date>.log`.
    - d. Check the UFI log file for messages. The name of the log file is `UFICoreService<date>.log` where `<date>` is today’s date.

If Email Manager for Exchange has been installed, if the capture indicator is required in Exchange (if an email is added to FileNet, the normal envelope icon will be changed to a FileNet icon), see the section APPENDIX D: EXCHANGE NOTIFICATION INDICATOR SETUP for details.

If Email Manager for Lotus has been installed, see the section APPENDIX E: EMAIL MANAGER LOTUS NOTES TEMPLATES for details on updating mail templates to support advanced icon change functionality.

### 4.3.3 Email Manager Web Services

If the Email Manager Web Services have been installed, verification steps should be performed to ensure the system has been configured correctly. To perform the verification, log on to the machine that the Email Manager Web Services have installed on and do the following repository specific tests.

#### 4.3.3.1 Email Manager Web Services for FileNet Content Services and Image Services

To verify that the web services have been configured properly, do the following:

1. Select CS Web Service in the menu Start -> Programs -> FileNet Email Manager 3.6 -> Server
2. Internet Explorer will open and if the test is successful, a page labeled eCWWSCS Web Service will be displayed.
3. Click the link `GetLibraries`.
4. On the subsequent page, click the button labeled `Invoke`.
5. A new Internet Explorer Window should open and an XML stream should show in window. The XML should contain a tag called `Libraries` and within the tag the FileNet CS libraries configured for use on the machine should be displayed. If the libraries are not listed, this may be due to either incorrect FileNet library configuration or the .Net user may not be able to access the library information on the machine. If the latter is true, the default .Net user may need to be changed. See **Appendix F: Changing .Net User** for details on changing the default .Net user.

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### 4.3.3.2 Email Manager Web Services for FileNet P8 Content Engine

To verify that the web services have been configured properly, do the following:

1. Select P8 Web Service in the menu Start -> Programs -> FileNet Email Manager 3.6 -> Server
2. Internet Explorer will open and if the test is successful, a page labeled eCWWSP8 Web Service will be displayed.
3. Click the link `GetLibraries`.
4. On the subsequent page, click the button labeled `Invoke`.

A new Internet Explorer Window should open and an XML stream should show in window. The XML should contain a tag called `Libraries` and within the tag the object stores configured for use on the machine should be displayed. If the object stores are not listed, this may be due to the .Net user being able to access the domain. In this case, the default .Net user may need to be changed. See APPENDIX F: CHANGING .NET USER for details on changing the default .Net user.

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### 4.3.4 Email Manager Server Silent Install

The Email Manager server may be “silently” installed by msiexec.exe (Microsoft Installer) with specific command line parameters.

Parameter	Description
ADDLOCAL	<p>May be used to specify a comma separate list of components that should be included in the installation. The following is a list of component names. Note that the names are case sensitive.</p> <p>"ConfigUtils" = Configuration Manager "sql" = SQL DB Connector "oracle" = Oracle DB Connector "exchangeconnector" = Exchange Connector "LotusConnector" = Lotus Connector "pstconnector" = PST Connector "p8connector" = P8 Repository Connector "isconnector" = IS Repository Connector "csconnector" = CS Repository Connector "filerepo" = File System Repository "UFIService" = Universal File Importer Service "P8" = P8 Client Web Services "CS" = CS Client Web Services "FileRetention" = File Retention Plugin</p> <p>Example:</p> <pre>msiexec /i "FileNet Email Manager Server 3.6.msi" ADDLOCAL=P8,sql,ConfigUtils,exchangeconnector,p8connector,UFIService /q</pre>
/q	<p>This parameter may be specified for msiexec (the Windows Installer application) if an install without user intervention is required. If this mode is being used, if values other than the defaults are required for the parameters, those values must be specified.</p> <p>Example:</p> <pre>msiexec /i "FileNet Email Manager Server 3.6.msi" ADDLOCAL=P8,sql,ConfigUtils,exchangeconnector,p8connector,UFIService /q</pre>



---

## 5 EMAIL MANAGER CLIENT

The setup required in this section assumes the administrator is knowledgeable about Windows desktop administration and Exchange/Outlook or Lotus Notes administration.

### 5.1 Pre-requisite Configuration

#### 5.1.1 Collect Client Information

In the Implementation Worksheet, enter the following information in the section **Email Manager Client** under the settings specified.

1. Under **Operating System**, enter the name and version of the operating system of the machine the Email Manager Client will be installed on.

#### 5.1.2 Desktop Software

##### 5.1.2.1 Email Manager Client for Exchange

The machines running the Email Manager Client will require Outlook to be installed and configured to allow end users to access **Exchange Server**.

##### 5.1.2.2 Email Manager Client for Lotus Notes

The machines running the Email Manager Client will require Lotus Notes Client to be installed and configured to allow end users to access **Lotus Notes Server**.

### 5.2 Installation

Before installing the Email Manager Client, ensure that the email client being used (either Outlook or Lotus Notes) is closed on the client machine. In addition, the Email Manager Web Services must be installed and configured on the Email Manager server.

1. Run the installer for the Email Manager Client. The installer can be found on the distribution media in the folder "Email Manager Client". Run the application `setup.exe` to start the installation.
2. In the Welcome screen click `Next`.
3. In the License Agreement screen, if you agree with terms in the license, select the "I accept the term in the license agreement" radio button and click `Next`.
4. In the Customer Information screen, update customer information as required and click `Next`.
5. In the Email Manager Client Options screen, select the email client being used and click `Next`.
6. In the Email Manager Document Repository screen, select the document repository being used and click `Next`.
7. In the Email Manager Server Information screen, set the value for the Email Manager Web Services URL, select the Repository Type and click `Next`. Enter the URL value as follows:

- If Email Manager Client for FileNet CS or IS is being installed, set the URL to `http://<host_name>/ecwwscs50/ecwwscs.asmx?WSDL`, replacing the text “<host\_name>” with the name of **Email Manager Web Services Machine**.
  - If Email Manager Client for Lotus Notes is being installed, set the URL to `http://<host_name>/ecwwsp850/ecwwsp8.asmx?WSDL`, replacing the text “<host\_name>” with the name of **Email Manager Web Services Machine**.
  - Enter the value entered in the registry key into the Implementation Worksheet in the section **Email Manager Client** under **eMgrWebServicesURL**.
8. Click `Install` to begin the installation.
  9. For Lotus Notes, see the following section, Lotus Notes Client Configuration, for details on further configuration required for Lotus Notes to install the Email Manager Client capture button on the toolbar. For Outlook, the Email Manager Client capture button will appear on the toolbar the next time Outlook is opened.

The following command line parameters may be used with the Email Manager Client installer to simplify the installation process for administrators.

Parameter	Description
ECWWEBSERVICESURL	<p>May be used to specify Email Manager Web Services URL that will be used. The default value is  “<code>http://&lt;host_name&gt;/ecwwscs50/ecwwscs.asmx?wsdl</code>”</p> <p>Example:</p> <pre>msiexec /i "FileNet Email Manager Client 3.6.msi" <b>ECWWEBSERVICESURL</b>="http://my_server/ECWWS50/ECWWS50.a smx?wsdl"</pre>
TARGETDIR	<p>May be used to specify what folder Email Manager should be installed in. The default value is “%Program Files%\FileNet\Email Manager Client 3.6”</p> <p>Example:</p> <pre>msiexec /i "FileNet Email Manager Client 3.6.msi" <b>TARGETDIR</b>="C:\eMgr"</pre>
EMAILCLIENT	<p>May be used to specify which email client the software should be installed for. The default value is “OUTLOOK”</p> <p>For Outlook XP/2003, specify “OUTLOOKXP”  For Outlook 2000, specify “OUTLOOK2000”  For Lotus Notes 6.0.3 to 6.5.x, 7.0, specify “NOTES6DXL”  For Lotus Notes 6.0.2, specify “NOTES6”  For Lotus Notes 5.0.x, specify “NOTES5”</p> <p>Example:</p> <pre>msiexec /i "FileNet Email Manager Client 3.6.msi" <b>EMAILCLIENT</b>="OUTLOOKXP"</pre>
FILENETREPOSITORY	<p>May be used to specify which document repository the software should be installed for. The default value is “FILENET_CS”</p> <p>For FileNet Content Services, specify “FILENET_CS”</p>

	<p>For FileNet Image Services, specify "FILENET_IS"</p> <p>For FileNet P8 Content Engine, specify "P8_CE"</p> <p>Example:</p> <pre>msiexec /i "FileNet Email Manager Client 3.6.msi" <b>FILENETREPOSITORY="P8_CE"</b></pre>
DXLIMPORTENABLED	<p>May be used to specify whether the option to import DXL files into Lotus Notes should be enabled. The default value is "0", representing "off".</p> <p>To turn on DXL file import support, set the value to 1.</p> <p>To turn off DXL file import support, set the value to 0.</p> <p>Example:</p> <pre>msiexec /i "FileNet Email Manager Client 3.6.msi" <b>DXLIMPORTENABLED="P8_CE"</b></pre>
LOTUSCLIENTDBPATH	<p>For Lotus Notes, may be used to specify the client database to use. If set, this setting will override the client database specified via the Configuration Manager.</p> <p>Example:</p> <pre>msiexec /i "FileNet Email Manager Client 3.6.msi" <b>LOTUSCLIENTDBPATH="clientdb.nsf"</b></pre>
LOTUSCLIENTDBSERVER	<p>For Lotus Notes, may be used to specify the Domino server that the client database resides on. If set, this setting will override the client server location specified via the Configuration Manager.</p> <p>Example:</p> <pre>msiexec /i "FileNet Email Manager Client 3.6.msi" <b>LOTUSCLIENTDBSERVER="mailserver"</b></pre>
TRAYICON	<p>For Lotus Notes, may be used to specify whether the client icon should show in the task tray to indicate that the client has been loaded. Setting the value to 1 will enable the tray icon and setting the value to 0 will disable the tray icon. The default value is 1.</p> <p>Example:</p> <pre>msiexec /i "FileNet Email Manager Client 3.6.msi" <b>TRAYICON="1"</b></pre>
/q	<p>This parameter may be specified for msiexec (the Windows Installer application) if a "silent" install (no user interface is shown for the installer) is required. If this mode is being used, if values other than the defaults are required for the parameters, those values must be specified.</p> <p>Example:</p> <pre>msiexec /i /q "FileNet Email Manager Client 3.6.msi" TARGETDIR="C:\eMgr" ECWWEBSERVICESURL=http://my_server/ecwscs50/ecwscs.asm x?wsdl EMAILCLIENT="OUTLOOKXP" FILENETREPOSITORY="P8_CE"</pre>

If command line parameters are required for an installation, the text can also be placed in a Windows BAT file to simplify the process of installing the Email Manager Client on more than one workstation.

---

If an error occurs when using the Email Manager Client, a log file will be created in the current user's "temp" location. The log file is named "errlog.log" and will contain more detailed information related to any error dialogs that are displayed.

## 5.2.1 Lotus Notes Client Configuration

For Lotus Notes, additional configuration is required to complete the installation of the Email Manager Client to connect to the correct Lotus Database and add the Email Manager capture icon to the Lotus Notes toolbar.

### 5.2.1.1 Client Database Registry Keys

Registry keys must be configured to specify the location of the Lotus Notes database being used for the client initiated capture (**Database for Email Manager Client**). These registry keys may be configured as a part of the installation by specifying values for the `LOTUSCLIENTDBPATH` and `LOTUSCLIENTDBSERVER` parameters in the installer or by manually setting the values in the registry. The following is a summary of the registry keys and values that should be assigned to each key.

Value	Type	Registry Key	Description
ClientDBServer	String	HKEY_CURRENT_USER\Software\FileNET\Email Manager\3.6\Client\LotusClient	The Domino server that the client database resides on. The full name of the server must be entered.
ClientDBPath	String	HKEY_CURRENT_USER\Software\FileNET\Email Manager\3.6\Client\LotusClient	The client database to use. The name of the database, including the path must be entered.

### 5.2.1.2 Adding Toolbar Button

In the Lotus client, a toolbar containing a "SmartIcon" must be added to Lotus Notes that will allow Email Manager to be opened from within Lotus Notes. The toolbar may either be installed using the toolbar install application included with Email Manager Client or may be manually installed.

#### 5.2.1.2.1 Automated Installation of Toolbar

To automate the installation of the toolbar, do the following:

1. Close the Lotus Notes Client if it is open.
2. In the menu, select Start -> Programs -> FileNet Email Manager 3.6 -> Install Lotus Notes Toolbar
3. Open the Lotus Notes Client.
4. If using Lotus Notes 6.x, the Email Manager components should be added to the toolbar. If using Lotus Notes 5.x, follow these additional steps:

- 
- a. To include the Email Manager smart icon in the toolbar, select the menu option File -> Preferences -> SmartIcon. The SmartIcon Settings screen showing available icons will appear.
  - b. In the SmartIcon Settings screen, scroll through the list of icons and find the Email Manager Client icon. Drag icon from the left side of the column to the right side of the column. Click OK.
  - c. The client icon will now appear on the toolbar of the Lotus Notes Client 5.0.

#### **5.2.1.2.2 Manual installation of Toolbar**

The SmartIcon file (.smi file), can be found in the folder Email Manager Client was installed in. Depending on the version of Lotus Notes Email Manager has been installed for, the icon file(s) require are:

- ecwr6.smi – for Lotus Notes 6.x
- ecwr5.smi, ewicon.mac, ewicon.bmp, ewicon.gif – for Lotus Notes 5.x

For Lotus Notes 6.x, add the toolbar as follows:

1. Open the Lotus Notes client.
2. In the file menu select the option File -> Preferences -> Toolbar Preferences....
3. In the Toolbar Preferences screen, click on the tab Toolbar.
4. In the Toolbar tab, click the button Import.
5. In the Choose SmartIcon Set dialog, locate the Email Manager SmartIcon to install in the folder Email Manager was installed in.
6. Click Open to add the toolbar.
7. In the Toolbar tab, ensure the Visible option is selected for the newly added toolbar. Click Ok to complete the toolbar update.

For Lotus Notes 5.x, add the toolbar as follows:

5. Close the Lotus Notes client.
6. Copy the files ecwr5.smi, ewicon.mac, ewicon.bmp and ewicon.gif into the folder specified in the Notes WinNTIconPath setting, which can be found in the Notes.ini file. The default location for the WinNTIconPath folder is C:\Lotus\Notes\Data\W32
7. Open the Lotus Notes client.
8. To include the Email Manager smart icon in the toolbar, select the menu option File -> Preferences -> SmartIcon. The SmartIcon Settings screen showing available icons will appear.
9. In the SmartIcon Settings screen, scroll through the list of icons and find the Email Manager Client icon. Drag icon from the left side of the column to the right side of the column. Click OK.
10. The client icon will now appear on the toolbar of the Lotus Notes Client 5.0.

---

# APPENDIX A: IMPLEMENTATION WORKSHEET

## FileNet Content Services

Setting	Value
FileNet Content Services Version	
Panagon Desktop Version	
Operating System	
Library System	
Library Server	
Email Manager FileNet User	

## FileNet Image Services

Setting	Value
FileNet Image Services Version	
Panagon Web Version	
Operating System	
Domain	
Organization	
Email Manager FileNet User	

## FileNet P8 Content Engine

Setting	Value
FileNet P8 Content Engine Version	
Operating System	
Object Store	
Host Server	
Email Manager FileNet User	

---

### Exchange Server

Setting	Value
Exchange Server Version	
Operating System	
Exchange Server	
Email Manager Exchange User	
Public Folder for Email Manager Client	
Public Folder(s) for Rules	

### Lotus Domino Server

Setting	Value
Domino Version	
Operating System	
Domino Server Name	
Organization Name	
Domain Name	
Email Manager Domino User	
Database for Email Manager Client	
Database(s) for Rules	

---

**Windows Domain**

Setting	Value
Windows Domain User	
Active Directory?	

**Email Manager Server**

Setting	Value
Operating System	
Email Manager Server Machine	
Temporary File Folder	
Log File Folder	

**Email Manager Web Services**

Setting	Value
Operating System	
Email Manager Web Services Machine	
Web Services URL	



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### SQL Server

Setting	Value
Operating System	
SQL Server Version	
SQL Server Name	
SQL Server IP	
Database	
Email Manager SQL User	

### Oracle Server

Setting	Value
Operating System	
Oracle Version	
Host	
Port	
SID	
Host String	
Email Manager Oracle User	

### Email Manager Client

Setting	Value
Operating System	
eMgrWebServicesURL	

---

# APPENDIX B: DOCUMENT CLASS CONFIGURATION

This section describes suggested configurations for document classes in document repositories supported by Email Manager.

## FileNet Content Services

To use Content Services with Email Manager, the following are required:

- At least one Document Class must be setup. Although it is recommended that a specific document class be created for email messages, any existing document class may be used.
- If metadata of the email message needs to be stored in Content Services, either existing Library Properties may be used to store the metadata or Custom Properties may be created. Depending on the metadata being stored, it is suggested the Custom Properties have the following attributes:

Email Metadata	Panagon Property Type
Attachment Flag	String (1)
CC Address	String (200) (multi-value)
CC Address/Display	String (200) (multi-value)
CC Display	String (200) (multi-value)
Conversation Topic	String (254)
Email Id	String (254)
From Address	String (254)
From Address/Display	String (254)
From Display	String (254)
Received Date (Local)	Date/Time
Received Date (UTC)	Date/Time
Sent Date (Local)	Date/Time
Sent Date (UTC)	Date/Time
Subject <sup>10</sup>	String (254)
To Address	String (200) (multi-value)
To Address/Display	String (200) (multi-value)
To Display	String (200) (multi-value)

---

<sup>10</sup> Subject it typically mapped to the FileNet CS "Title" property

---

## FileNet Image Services

To use Image Services with Email Manager, the following are required:

- At least one Document Class must be setup. Although it is recommended that a specific document class be created for email messages, any existing document class may be used.
- If metadata of the email message needs to be stored in Image Services, either existing Library Properties may be used to store the metadata or Custom Properties may be created. Depending on the metadata being stored, it is suggested the Custom Properties have the following attributes:

Email Metadata	Panagon Property Type
Attachment Flag	String (1)
CC Address	String (239)
CC Address/Display	String (239)
CC Display	String (239)
Conversation Topic	String (239)
Email Id	String (239)
From Address	String (239)
From Address/Display	String (239)
From Display	String (239)
Received Date (Local)	Date
Received Date (UTC)	Date
Sent Date (Local)	Date
Sent Date (UTC)	Date
Subject	String (239)
To Address	String (239)
To Address/Display	String (239)
To Display	String (239)

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## FileNet P8 Content Engine

To use P8 Content Engine with Email Manager, the following are required:

- At least one Document Class must be setup. The default Email class that is created as part of Content Engine installation may be used.
- If metadata of the email message needs to be stored in the Object Store, either existing document class properties may be used to store the metadata or custom properties may be created. Depending on the metadata being stored, it is suggested the custom properties have the following attributes:

Email Metadata	CE Property Type
Attachment Flag	String (1)
CC Address	String (254) (multi-value)
CC Address/Display	String (254) (multi-value)
CC Display	String (254) (multi-value)
Conversation Topic	String (254)
Email Id	String (254)
From Address	String (254)
From Address/Display	String (254)
From Display	String (254)
Received Date	DateTime
Sent Date	DateTime
Subject	String (254)
To Address	String (254) (multi-value)
To Address/Display	String (254) (multi-value)
To Display	String (254) (multi-value)

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# APPENDIX C: EMAIL SERVER MESSAGE JOURNALING CONFIGURATION

This section describes how to enable message journaling in Microsoft Exchange 5.5/2000/2003, and Lotus Notes 6.x.

## Exchange 5.5 SP1

This section contains instructions for enabling Message Journaling in Microsoft Exchange Server 5.5 (Service Pack 1). When Message Journaling is enabled, a copy of all inbound and outbound email will be placed into a specified Exchange folder. For a more detailed description of Message Journaling features in Exchange Server, please consult the Exchange Server documentation provided by Microsoft.

*Note: the following instructions apply only to Microsoft Exchange 5.5 using Service Pack 1 or higher. These instructions do not apply to Microsoft Exchange 2000.*<sup>11</sup>

To enable Message Journaling do the following:

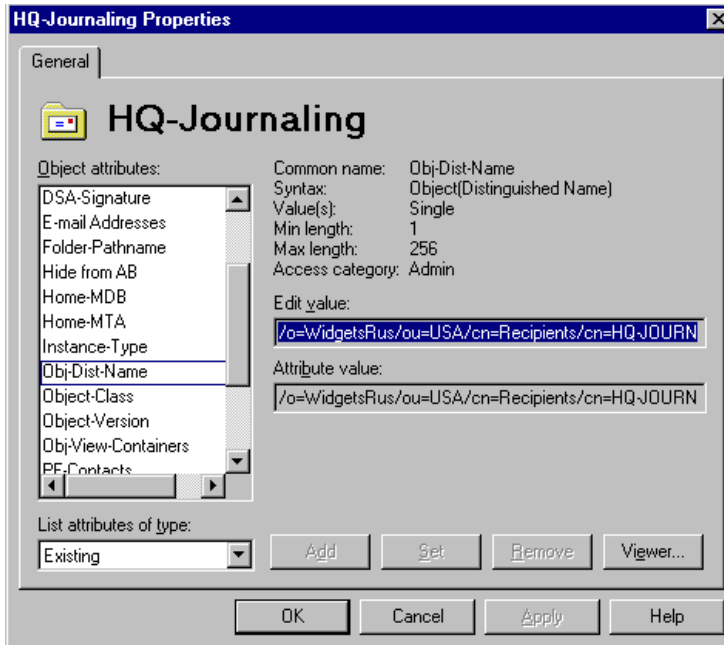
1. Create a Public Folder in Exchange Server that will be used to store all incoming and outgoing email. Assign appropriate permissions to the folder so that only system administrator may access the folder otherwise all users may be able to access the contents of the folder.
2. Disable local delivery and force the MTA (Message Transfer Agent) to handle the message. Add the REG\_DWORD data type value **No Local Delivery** to the HKEY\_LOCAL\_MACHINE\SYSTEM\CurrentControlSet\Services\MSExchangeIS\ParametersSystem key. Enter **1** in the Data Value field.
3. To force all Internet messages to pass through the MTA, add the REG\_DWORD data type value **ReRouteViaStore** to the HKEY\_LOCAL\_MACHINE\SYSTEM\CurrentControlSet\Services\MSExchangeIMC\Parameters key. Set the value to **1**. (Make sure *there are no spaces between the words ReRouteViaStore*). This string value has to be added to only those servers that have the IMS installed locally.
4. To specify Message Journaling at the server, site, or organization level, add the REG\_DWORD data type value **Per Site Journal Required** to the HKEY\_LOCAL\_MACHINE\SYSTEM\CurrentControlSet\Services\MSExchangeMTA\Parameters Registry key. Set the value to **0** for organization-level journaling, to **1** for site-level journaling, or to **2** for server-level journaling.
5. To configure the public folder as the journaling recipient, obtain the DNs (distinguished names) for each server's public folder.

To view the DN:

- a. Go to Start -> Run, and type C:\exchsrvr\bin\admin.exe /r
- b. Click OK.
- c. From the Folders -> Public Folders container, select the journal recipient (the public folder name).
- d. From the File menu, choose Raw Properties.
- e. In the Object attributes box, select Obj-Dist-Name.
- f. Copy the DN value in the *Edit value* box.

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<sup>11</sup> From Microsoft Knowledge Base Article 239427 (<http://support.microsoft.com/default.aspx?scid=kb;EN-US;q239427>)



**Figure A-1 Sample of HQ Journaling Properties**

- g. Add the REG\_SZ data type value **Journal Recipient Name** to the HKEY\_LOCAL\_MACHINE\SYSTEM\ CurrentControlSet\Services\MSEExchange MTA\Parameters Registry key.
- h. Set the value to the DN of the journal recipient, which was captured in Step f.

### Exchange 2000/2003

Follow these steps to enable Message Journaling in Exchange 2000/2003<sup>12</sup>.

1. In Exchange System Manager, click **servers**.
2. Click **storage Group**, right-click on the mailbox store that Journaling should be enabled for, and then click **Properties**.
3. On the **General** tab, click to select the **Archive all messages sent or received by mailboxes on this store** check box, and then click **Browse** to choose an account for the archived messages.

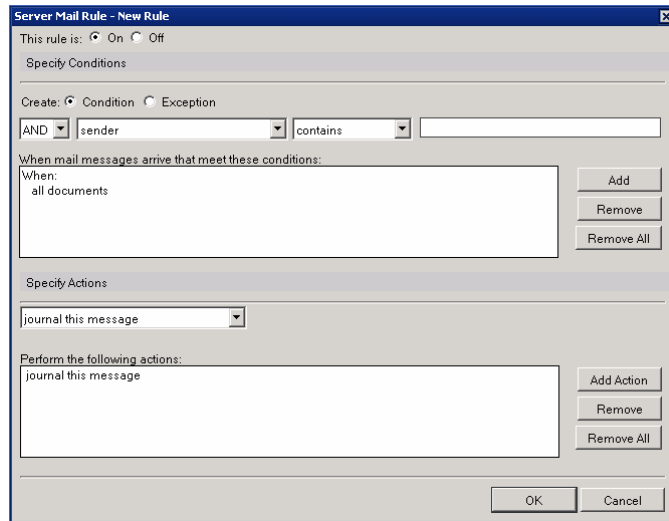
<sup>12</sup> From Microsoft Knowledge Base Article 261173(<http://support.microsoft.com/default.aspx?scid=kb;en-us;261173>)

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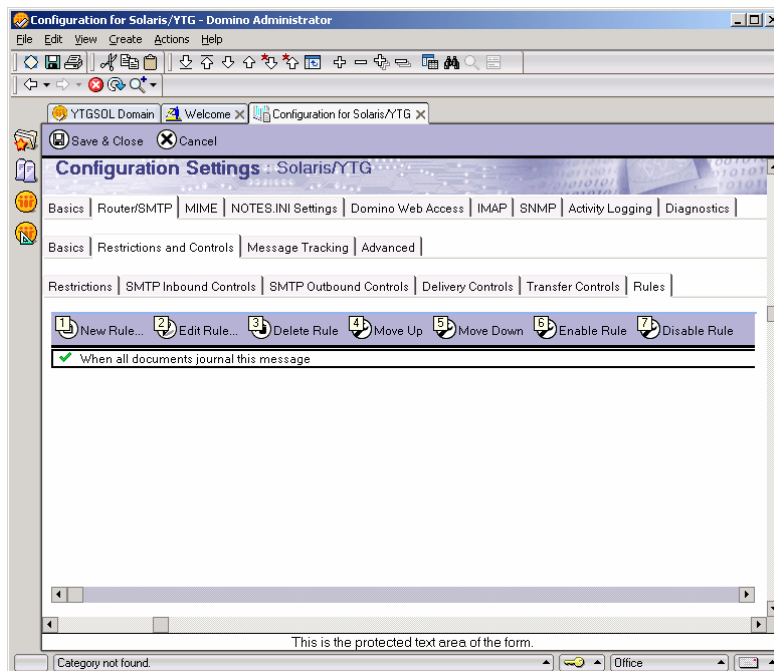
## Lotus Domino 6.x,/7.0

Follow these steps to enable Message Journaling in Lotus Domino 6.x/7.0

1. Create a mail-in database.. Keep a note of the mail-in name (e.g. “eMgr Journal”) and the database path (e.g. “eMgr/eMgrJournal.nsf”).
2. Create a Domino Server Rule to journal messages. This step is performed using the Domino Administrator.
  - a. To open the Server configuration document:
    - i. Open the Domino Administrator.
    - ii. Select the server to administer (**File, Open Server...**).
    - iii. Select the Configuration tab, click on the **Messaging** node in the tree-view to expand it, and then select **Configurations** to show the server configuration documents.
    - iv. Select the Domino Server where journaling will be enabled, then click the **Edit Configurations** button (above the server list) to open the Configuration Settings document for the server.
  - b. To open the server mail rule dialog:
    - i. In the Configuration Settings dialog, select the **Router/SMTP** tab (the 2<sup>nd</sup> tab). A second row of tabs will appear.
    - ii. On the second row of tabs, select the **Restrictions and Controls** tab (the 2<sup>nd</sup> tab). A third row of tabs will appear.
    - iii. On the third row of tabs, select the **Rules** tab (the last tab). The list of current rules (if any) will be displayed.
    - iv. Click the New Rule button to open the Server Mail Rule dialog.
  - c. Journaling can be applied selectively or to all documents. The following instructions will define a simple rule that will cause all messages to be journaled. However you can define more sophisticated rules if required. To create a journaling rule:
    - i. Open the Server Mail Rule dialog.
    - ii. In the **Specify Conditions** section, select “all documents” and click **Add** to define the condition.
    - iii. In the **Specify Actions** section, select “journal this message” and click **Add Action**.



- iv. Click **OK** to save the rule. The rule will now appear in the rules list.



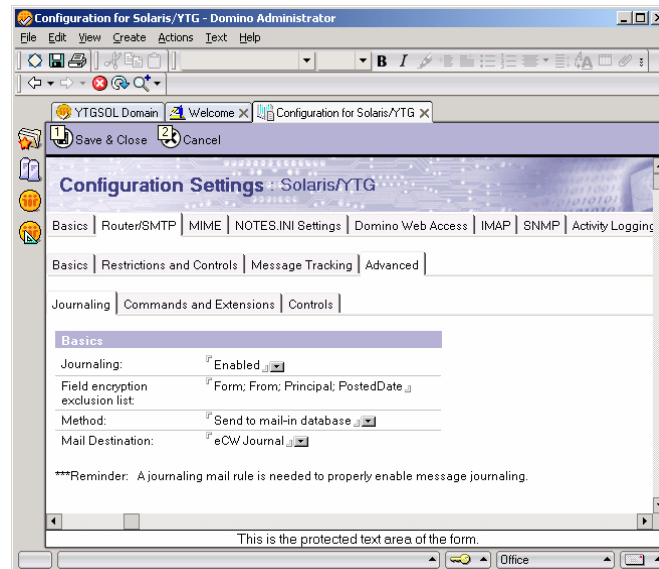
### 3. Enable Domino Mail-in journaling

- a. To open the journaling tab:
  - i. If you have just created a rule, the Configuration Settings dialog will be open. Otherwise, Open the Domino Administrator, open the Server Configuration document (see above) and select the **Router/SMTP** tab (the 2<sup>nd</sup> tab).
  - ii. On the second row of tabs, select the **Advanced** tab (the 4<sup>th</sup> tab). A third row of tabs will appear.
  - iii. If the Journaling tab (the 1<sup>st</sup> tab on the 3<sup>rd</sup> row) is not pre-selected then click to select it

- b. To enable journaling:



- i. At the **Journaling:** prompt, select “Enabled”.
- ii. At the **Method:** prompt, change the journaling method to “Send to mail-in database”. The prompts in the Journaling page will change to show the Mail Destination: prompt.
- iii. Click on the arrow button to the right of the **Mail Destination:** prompt and select your journaling mail-in database from the directory.



- c. To apply the settings:
  - i. Click on the Save & Close button to save the configuration settings document.

The changes to the journaling configuration and the rules will not take effect immediately. The changes will take place after the next router configuration update. This takes place at intervals of approximately 5 minutes.

To force the rules and journaling to take effect immediately. If the server is running locally, enter the following command at the server console:

```
Tell router update config
```

---

# APPENDIX D: EXCHANGE NOTIFICATION INDICATOR SETUP

An organizational form needs to be created in Exchange Server that will be used by Email Manager to display the capture icon on messages in a user's Outlook Inbox. After the organizational form is created, depending on the replication settings of the Exchange Server, the capture icon form may take up to 24 hours to propagate to users.

If an Organization Forms Library does not already exist it must be created

For Exchange 5.5, create an Organizational Forms Library as follows:

1. Open the Exchange Administration Utility
2. Select the menu item Tools -> Forms Administrator to open the Organizational Forms Library Administrator dialog.
3. Click the **New** button to open the Create New Forms Library dialog.
4. Click **Ok**.

For Exchange 2000, create an Organizational Forms Library as follows<sup>13</sup>:

1. Open Exchange System Manager.
2. Click to expand **Administrative Groups**.
3. Click to expand **Folders**.
4. Click **Public Folders**.
5. On the **System Manager** toolbar, click **Action**.
6. Click to select **View System Folders**.
7. In the console tree, right-click **EForms Registry**.
8. Click **New**, and then click **organization form**.
9. In the **Name** box, type the name of the folder.
10. Under Eforms language, click to select the appropriate language.

To create the Organizational Form that is required by Email Manager, do the following:

1. Open Outlook.
2. Make sure the default Outlook mail format is "HTML" mode. If it is not, change it to HTML in the screen Tools -> Options in the Mail Format tab.
3. Create a new form by choosing the menu item Tools -> Form -> Design a Form.
4. In the Design a Form dialog, choose the "Message" form and click the **Open** button to open the Form Design window (See Figure B-1).
5. In the Form Design window, click on the Properties tab. Click the **Change Large Icon...** button and browse to the folder that was installed in. Open the subfolder "Icons", select the icon "FnIDMDS.ico" (select "ObjectStore32.ico" for P8) and click **Open**.
6. Click the **Change Small Icon...** button, choose the icon "FnIDMDSs.ico" (select ObjectStore32s.ico" for P8), and click **Open**.
7. Ensure the option "Send form definition with item" is not selected.
8. Choose the menu item Tools -> Forms -> Publish Form As... In the Publish Form As dialog, in the "Look In" combo box, select "Organizational Forms Library". In the "Display Name" field, type: "Archived". In the "Form Name" field, type "Archived". Click the **Publish** button to publish

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<sup>13</sup> From Microsoft Knowledge Base Article 271816 (<http://support.microsoft.com/default.aspx?scid=kb;en-us;271816>)

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the form. **If a prompt appears asking whether the option “Send form definition with item” should be selected, answer No to the question.**

9. Close the Form Design window. When prompted to save the form, select No.

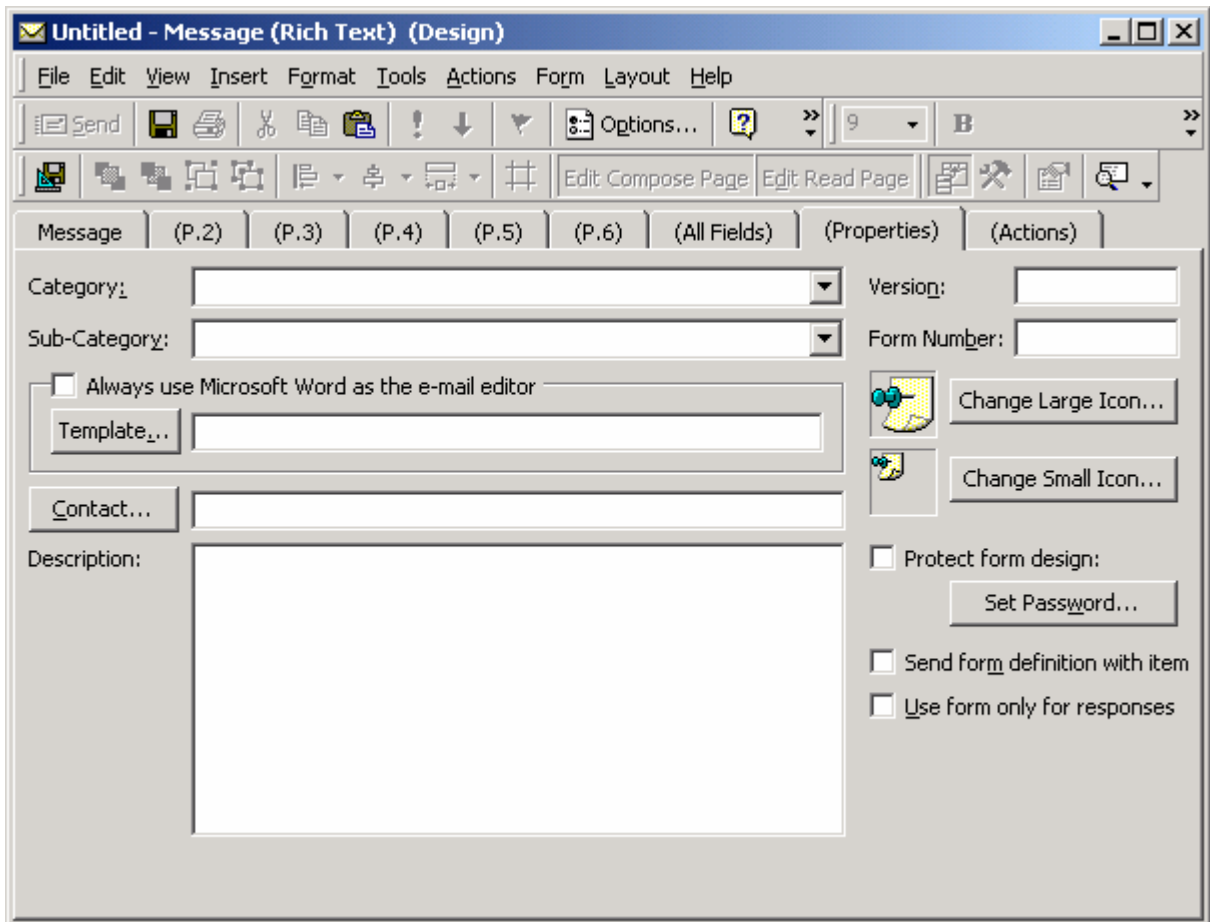


Figure B-1 Properties tab in Form Design window

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# APPENDIX E: EMAIL MANAGER LOTUS NOTES TEMPLATES

When creating Lotus Notes databases for use with Email Manager, the database may be created based on Email Manager templates. Email Manager templates contain additional views that may assist administrators when troubleshooting issues or may be used to extend Email Manager functionality in mailboxes. The templates can be found in the Lotus Templates folder on the Email Manager distribution media.

The following templates are included:

Template	Description
Mailbox Enabler (eMgrMboxEnabler.ntf)	Optional items that administrators may want to consider adding to Notes mail templates. <ul style="list-style-type: none"><li>• sample views showing icon change</li><li>• custom icons</li><li>• view for message id (to support processing options)</li></ul>
Mailbox Demo (eMgrMboxDemo.ntf)	Sample of standard Note mail template with items that are in Mailbox Enabler template.  For Lotus Notes 5.x, the sample mailbox template also contains sample agents that may be used forward email to capture databases.
Cache (eMgrCache.ntf)	A template that may be used for the Cache database that contains sample views for reading diagnostic information created by Email Manager.
Client (eMgrClient.ntf)	A template that may be used for the Client capture database that contains sample views for reading diagnostic information created by Email Manager.

## Template Installation



The following is an overview of how to install Lotus Notes templates. The installation process described here uses the Notes workspace, the legacy user interface for Notes. The workspace displays pages containing database icons. Each icon is a bookmark that references a Notes database, either on a Domino server or the local filing system. Using the Notes workspace simplifies the installation process, keeping track of local and server instances of templates. Experienced Notes administrators should use their standard template deployment methods.

### To install a template on a Domino Server:

#### Open the Notes client

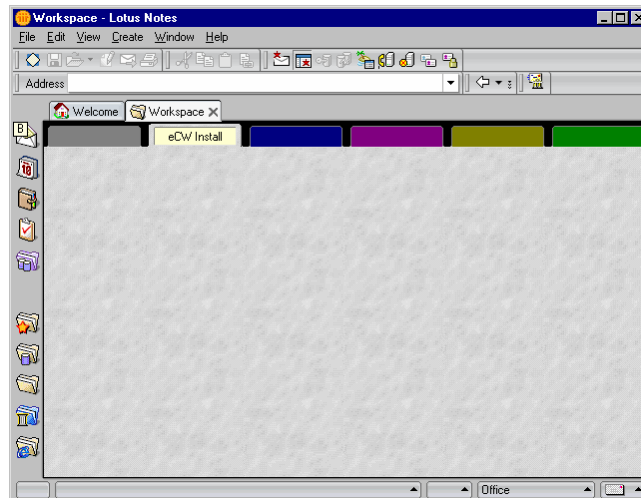
- Open the Lotus Notes client and log on to the Domino server where the templates will be deployed.

#### Open the Workspace

- Click the databases folder icon  on the Bookmark bar.
- Select the Workspace bookmark to open the workspace.  Workspace

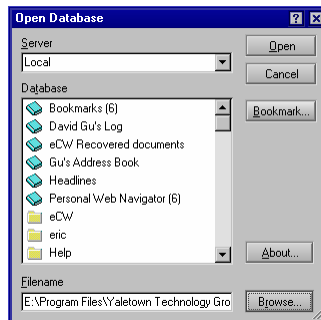
The workspace displays one tabbed page on top and five other workspace pages capped by a tab. Each workspace page can hold database icons.

- Select an unused tab page for the installation process. Right-click, select “Workspace Properties...” and enter a label for the tab page.

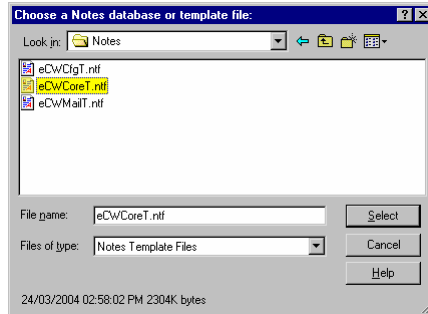


### Create a bookmark for the template on the local filing system

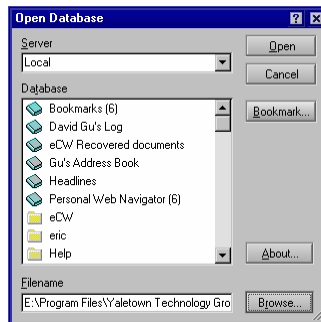
- In the Notes client, choose "File-Database-Open..." from the menu. This will open the Notes Open Database dialog:



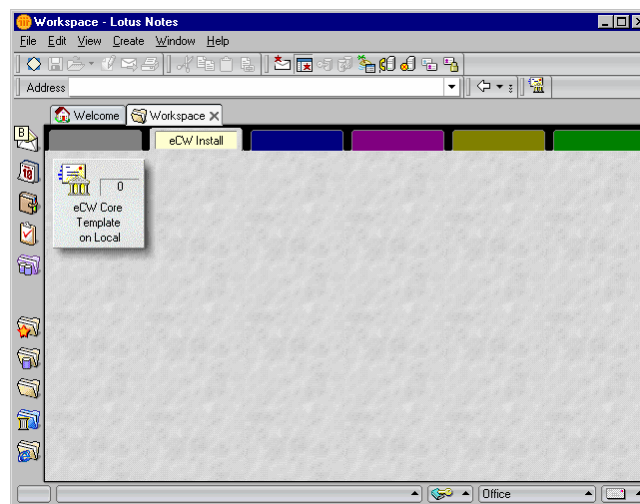
- In the Notes Open Database dialog, ensure that ‘Local’ is selected at the Server prompt (so that Notes will look for databases and templates on the client’s hard disk, not the server). Click on the "Browse" button (bottom right) to bring up the file selection dialog:



- Before browsing for the file, go the "Files of type" checkbox and change the selected type from "Notes Database Files" to "Notes Template Files". Select the file template file (see table above) and click on the Select button.

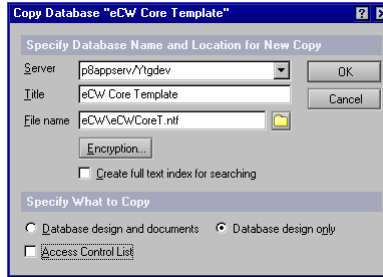


- When the file has been selected, click the "Bookmark..." button and then click "OK" to add the bookmark. Once the bookmark has been created, click "Cancel" to close the database open dialog and return to the Notes workspace. (Note: This process is only intended to create the bookmark. No databases or templates are actually opened at this stage.) The workspace will now contain a bookmark for the Notes template in the local filing system:

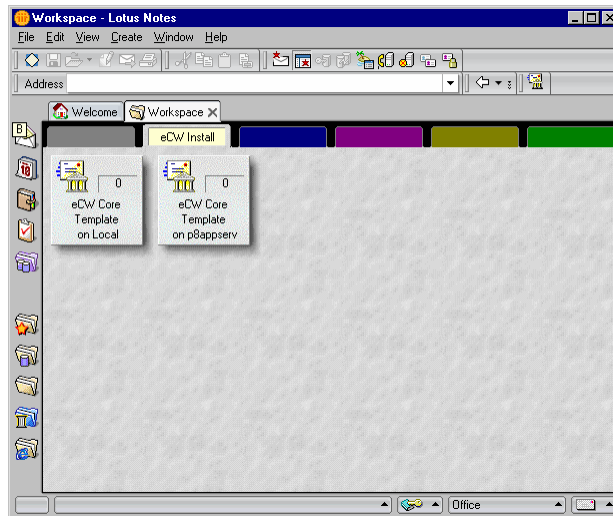


### Copy the template from the local filing system to the Domino server

- From the Workspace, select the template bookmark you created at the previous step, right-click and choose "Database, New Copy...". This will open the Copy Database dialog.



- Select the server and edit the default filename, adding the prefix “eMgr\”, so that all Email Manager templates and databases are kept together in an eMgr folder (the eMgr folder will be created if necessary).
- In the “Specify What to Copy” section, select "Database design only" and ensure that the "Access Control List" checkbox is NOT checked. Click OK to create the new template copy.
- There will now be two bookmarks for the template, the temporary bookmark for the version on the local filing system, and a new bookmark for the server template:



- (Optional) At this stage you may remove the temporary bookmark for the source file on the local filing system (server identified as "Local").
- Typically only administrators and designers will need access to the template. If you need to change the default template security, right click on the new bookmark, select **Database, Access Control** and update the access control list.

---

## APPENDIX F: CHANGING .NET USER

In some cases, it may be necessary to change the default user that .Net uses when running .Net components (such as the Email Manager Web Services). Procedures for changing the .Net user differ for Internet Information Service (IIS) 5.0 and 6.0.

Either an existing user account may be used for the .Net user or a new account may be created for the .Net to use. Note that the user must be a domain user. The following is a summary of known folders that the .Net user requires permissions to access. Security should be configured such that all subfolders of these folders have the same permissions. The list of folders may differ depending on the machine configuration. In addition to the folders below, the user will also require full access to the Temporary and Log folders created for Email Manager.

**Folder:** %windir%\temp

**Access Type:** Read/Write

**Folder:** %windir%\system32

**Access Type:** Read

**Folder:** %windir%\Microsoft.NET\Framework\v1.1.XXXX

**Access Type:** Read

**Folder:** %windir%\Microsoft.NET\Framework\v1.1.XXXX\Temporary ASP.NET Files

**Access Type:** Read/Write on the folder and List Folder Contents on the drive's root folder

**Folder:** %systemdrive%\Program Files\FileNet

**Access Type:** Read

**Folder:** %windir%\inetpub\wwwroot

**Access Type:** Read

**Folder:** %windir%\WINNT\assembly

**Access Type:** Read

**Folder:** %systemdrive%\Program Files\Common Files\MSSoap\Binaries

**Access Type:** Read

If FileNet Content Services is being used, the following permissions are required:

**Folder:** %systemdrive%\Program Files\FileNET\IDM

**Access Type:** Read

**Folder:** %systemdrive%\Program Files\FileNET\Shared

**Access Type:** Read



---

## IIS 5.0 .NET USER UPDATE PROCEDURE

See the following Microsoft articles for details on how to create and change the .Net user:

[http://msdn.microsoft.com/library/default.asp?url=/library/en-us/wss/wss/exch2k\\_running\\_asp\\_net\\_on\\_a\\_dc.asp](http://msdn.microsoft.com/library/default.asp?url=/library/en-us/wss/wss/exch2k_running_asp_net_on_a_dc.asp)

<http://support.microsoft.com/default.aspx?scid=kb%3Ben-us%3B315158>

<http://support.microsoft.com/default.aspx?kbid=317012>

The following is a summary of how to change the .Net user:

1. Identify the user that should be used by .Net (either create a new user using Microsoft's instructions or use an existing user). Ensure that the user has access to all the files and folders required by .Net.
2. Navigate to the folder `%systemroot%\Microsoft.Net\Framework\V1.1.XXXX\CONFIG`
3. Open the file `machine.config` in Notepad.
4. In the `<processModel>` section, change the `userName` and `password` attributes to the name and password of the new user account. For example:

```
userName="DomainName\ASPNETUSER" password="ASPNETUSERpassword".
```

5. Save the `machine.config` file.
6. IIS may have to be reset or the `aspnet_wp.exe` process may need to be manually terminated before the changes take effect.

By default, password in the `machine.config` file is entered as clear text, to learn how to encrypt the password, see the following article: <http://support.microsoft.com/default.aspx?scid=kb;en-us;329290>.

## IIS 6.0 .NET USER UPDATE PROCEDURE

If Internet Information Service (IIS) 6.0 is being used, the following configuration is required:

1. Add the .Net user created above to the IIS\_WPG local group.
2. Open the IIS Manager application.
3. In the tree view select the application pool for Email Manager, right click and select Properties. The application pool can be found in the tree view under `<server name> -> Applications Pools`.
4. In the application pool properties screen, in the Identity tab, select the radio button "Configurable", and enter the user name (preceded by the domain name) and password for the .Net user created above.
5. Click Ok to save the settings.
6. Restart IIS for the changes to take effect.

---

## APPENDIX G: PST CONNECTOR UNTAG UTILITY

In a PST Connector Profile, if the Processing Option “Mark File as Processed” is selected, a tag will be added to PST files processed by the PST Connector. The tag may be used to prevent the PST Connector from re-processing the PST file at a later date. If a file that has been tagged by the PST Connector needs to be reprocessed at a later, a utility included with Email Manager may be used to remove tags from files.

The un-tagging utility can be found in the Email Manager installation folder and is called `Untag.exe`. The utility is a command line application that accepts as input filenames and folder paths.

### Syntax:

```
Untag.exe [\s] filenames
```

### Description:

`filenames`: a list of one or more files that should be “un-tagged”. The file names may include wild card characters.

`\s`: (Optional) if the parameter `\s` is included, all subfolders will be search for the `filenames` specified as well. Only subfolders of paths specified as a part of the `filenames` will be searched.

### Examples:

Process files with a specific name:

```
Untag.exe c:\docs\file.pst
```

Process files with a specific file extension:

```
Untag.exe c:\*.pst
```

Search all sub-locations for files with a specific name:

```
Untag.exe \s c:\docs\file1.pst c:\docs\file2.pst
```

Process all files in a folder:

```
Untag.exe c:\files\*.*
```

Process all files in a folder and all its subfolders:

```
Untag.exe \s c:\files\*.*
```

Because the tags added to files by Email Manager are not visible as a part of the file properties, the tags cannot be viewed through the file properties screen in Windows Explorer. Notepad may be run from the command line to display the file tags. Use the following command to determine whether a file has been tagged as “captured” by Email Manager:

```
notepad "<filename>:UFI_CAPTURED"
```

where `<filename>` is the name of the file.

Use the following command to determine whether a file has been tagged as “processed” by Email Manager:

```
notepad "<filename>:UFI_PROCESSED"
```

If the file has been tagged, Notepad will open and the value of the tag will show in Notepad (the value will be either “Y” or “N”). If the file has not been tagged, the following message will show: Cannot find the `<filename>:UFI_CAPTURED.txt` file.

---

# APPENDIX H: ERROR HANDLING OVERVIEW

This section contains an overview of how the system handles various error conditions.

## EXCHANGE CONNECTOR

The Exchange Connector may either encounter errors when attempting to process an item on the Exchange Server or when attempting to add files to the document repository.

### Exchange Server Related Errors

If an error occurs while processing an item on the Exchange Server that the Exchange Connector cannot correct without intervention, the Exchange Connector will do the following:

- Move the email message to a sub-folder of the monitored location called “eMgr Capture Failed”. The item in the location may be examined to determine why an error occurred while processing the message.
- Log an error to the Exchange Connector log file. The log file will contain a reference to the email that caused the error, the error number and a description of the error.
- Log an error to the Application Event Log. The entry in the event log will contain details related to the error.
- Copy the email file to a location on the file system (if this option has been enabled in the Exchange Connector Processing Options for Error Items).

### Document Repository Related Errors

If an error occurs while attempting to add a file to the document repository due to the document repository not being available (i.e. the document repository server may be turned off or the network may not be available), the Exchange Connector will effectively “pause” until the document repository becomes available.

If an error related to a document repository exception (i.e. a mandatory property in a document repository has not been assigned a value), error handling described in the Exchange Server Related Errors section will be applied.

## LOTUS CONNECTOR

The Lotus Connector may either encounter errors when attempting to process an item on the Lotus Domino Server or when attempting to add files to the document repository.

### Lotus Domino Server Related Errors

If an error occurs while processing an item on the Domino Server that the Lotus Connector cannot correct without intervention, the Lotus Connector will do the following:

- Add a message to the “Error View” in the Cache Database with a status code of “256”.
- Log an error to the Lotus Connector log file. The log file will contain a reference to the email that caused the error, the error number and a description of the error.
- Log an error to the Application Event Log. The entry in the event log will contain details related to the error.
- Copy the email file to a location on the file system (if this option has been enabled in the Lotus Connector Processing Options for Error Items).

---

## Document Repository Related Errors

If an error occurs while attempting to add a file to the document repository due to the document repository not being available (i.e. the document repository server may be turned off or the network may not be available), the Lotus Connector will effectively “pause” until the document repository becomes available.

If an error related to a document repository exception (i.e. a mandatory property in a document repository has not been assigned a value), error handling described in the Lotus Server Related Errors section will be applied.

## PST CONNECTOR

The PST Connector may either encounter errors when attempting to process an item on the file system, attempting to process an item in a PST Archive file, or when attempting to add files to the document repository.

### File System Related Errors

If an error occurs while attempting to access a PST Archive on the file system that PST Connector cannot correct without intervention, the PST Connector will do the following:

- Log an error to the PST Connector log file. The log file will contain a reference to the file that caused the error, the error number and a description of the error.
- Log an error to the Application Event Log. The entry in the event log will contain details related to the error.
- Copy the file to a location on the file system (if this option has been enabled in the PST Archive Processing Options for Error Items).

### PST Archive Related Errors

If an error occurs while processing an item in a PST Archive that the PST Connector cannot correct without intervention, the PST Connector will do the following:

- Move the email message to a sub-folder of the current location called “eMgr Capture Failed”. The item in the location may be examined to determine why an error occurred while processing the message.
- Log an error to the PST Connector log file. The log file will contain a reference to the email that caused the error, the error number and a description of the error.
- Log an error to the Application Event Log. The entry in the event log will contain details related to the error.
- Copy the email file to a location on the file system (if this option has been enabled in the PST Content Processing Options for Error Items).

Note that if a one or more items in a PST Archive cannot be processed, processing of the PST Archive will not fail. The PST Connector will continue to process all other items in the PST Archive. After a PST Archive is processed, the error log should be examined to ensure all items within a PST Archive were successfully captured.

## Document Repository Related Errors

If an error occurs while attempting to add a file to the document repository due to the document repository not being available (i.e. the document repository server may be turned off or the network may not be available), the PST Connector will effectively “pause” until the document repository becomes available.

If an error related to a document repository exception (i.e. a mandatory property in a document repository has not been assigned a value), error handling described in the PST Archive Server Related Errors section will be applied.

---

# APPENDIX I: LOTUS CONNECTOR CACHE DATABASE CODES

The following is a summary codes that the Lotus Connector may write to the Cache Database.

Code	Description
1	Queued
2	Rules Applied
4	Index template assigned (fits a rule)
8	Exported
16	Uploaded to UFI
32	Stub created (for shortcuts or attachment removal)
64	Ready for post processing
128	Post processing completed
256	Error

The code values are bit flags and can be added together to form the current status. The value of the status flag determines which views a document appears in (i.e. Status=1 appear in Queued Items View, Status >=256 appear in Error view). The views will only appear if the cache database template included with Email Manager (eMgrCache.nsf) was used when the cache database was created.

To match a reference to an item in the log file to an item in the cache database, the UID (unique identifier) for the item is required. The UID will be embedded with the log entry in the log file.