EMAIL MANAGER 3.7 CONFIGURATION MANAGER USER GUIDE

Rev. 1.7

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1   INTRODUCTION

This document describes how to use the Email Manager (eMgr) Configuration Manager.

The parent screen of the Configuration Manager consists of the two sections: a tree structure that shows the various components that make up Email Manager and a content pane that shows details for each component if a component is selected in the tree. Components may be added, removed, edited or copied. For each component, the options available are shown in the content pane, in the right click menu and in the file menu.

The tree contains several sections:

- Configuration Options: contains global system settings for temporary file location and Logging.

- Lists: List of words that may be used in rule clauses.

- Rules: rules to specify what items should be captured.

- Repositories and Index Templates: repositories registered for use with Email Manager and templates containing indexing and security information that will be used to add documents to repositories

- Source Servers and Profiles: Email Servers that Email Manager should connect to and profiles that define what locations on the email server to monitor, what rules to apply to items in the location and what index template to use is a particular rule applies.

- Client Configuration Options: configuration settings related to the Email Manager Client and client profiles that are used to define how email should be indexed when manually capturing items.

2 CONFIGURATION OPTIONS

The Configuration Options section contains global system settings for the temporary file location and logging.

To edit the Configuration Options, select Configuration Options in the tree and either click the "Edit" button in the content pane, right click on the Configuration Options node and select "Edit", or in the file menu select "Edit -> Edit…". The Configuration Options edit screen will open to allow settings to be updated. After updates have been made, click the "Ok" button to save the settings. To cancel the updates, click the "Cancel" button.

2.1 General Settings

The General Settings section contains general settings for the system.

Field	Description
Temporary Files Folder	The file folder that temporary files created by the application should be written to. Click the "…" to select a folder.

2.2 Logging

The Logging section contains settings to enable/disable system logging and to set the type of logging to use.

Field	Description
Log Type	Valid values are "Logging Disabled", which turns off logging and "Log To File", which will turn logging on. If "Log To File" is selected, a log file will be created for each system component.
Log Level	The type of data that should be written to the log file. Options available include: • Fatal Errors: The minimum logging detail. An event is written to the log whenever a severe problem or critical condition occurs. • All Errors: An event is written to the log whenever an error condition occurs—such as when a connection attempt to a server fails. • Warnings: An event is written to the log whenever a warning condition occurs—such as when the server cannot understand a communication sent to it. • Information: An event is written to the log with every significant action that takes place—such as when a document is captured. • Trace: The most verbose logging. Useful only for debugging purposes. Events are written to the log at individual steps

	within each process or task, to pinpoint problems.
Log File Location	The file folder that log files created by the application should be written to. Click the "…" to select a folder.

2.2.1   Log Retention Options

The Log Retention Options section may be used to define the number of days a log file should exist before it is automatically deleted by the system. Note that the Email Manager services must be running in order for log file deletion to occur.

Field	Description
Enable log file retention	If selected, log file retention will be enabled.
Days to retain log files	The number of days to retain each log file.
Enable audit log file retention	If selected, audit log file retention will be enabled. Note: for instructions on how to enable audit logging, see the section 6.1.6 Audit Log Settings.
Days to retain audit log files	The number of days to retain each audit log file.

2.2.2   UFI Settings

Field	Description
Port	The port number that Email Manager components will use to communicate with each other. This value should only be changed if the default port number conflicts with port numbers being used by other applications.

3   LISTS

Lists may be used to define lists of data, such as synonyms for words, for use in Rules. Rules can be created that will look for a word or phrase that appears in a list in a document property.

- To add a new List, select List in the tree and either click the "New List" button in the content pane, right click on the List node and select "New List…", or from the file menu choose Edit -> New List…

- To edit an existing List, select List in the tree and either click the "Edit" button in the content pane, right click on the List node and select "Edit…", or from the file menu choose Edit -> Edit…

- To remove an existing List, select List in the tree and either click the "Delete" button in the content pane, right click on the List node and select "Delete…", or from the file menu choose Edit -> Delete. Note that a List that is being used by a Rule cannot be removed.

If Edit or New are selected, the Edit List screen is shown, which allows a List to be configured.

3.1   Edit List

The Edit List screen may be used to define a list of values.

Field/Section	Description
List Name	The name to use to refer to the List. The list name entered should be unique.
Description	A description of the list content (optional).
List Values	Values contained in the list. To add a value, click the Add button. To edit and existing value, click the Edit button. To remove a value, click the Delete button. To change the order of an item a list, select the item and click the "up" or "down" button. The order that items appear in the list is the order in which the items are evaluated when the list is used in a Rule.

3.1.1   Edit List Value

Field/Section	Description
Value	The value of the list item. This is the value that will be used when evaluating a rule clause.
Return Value	The value returned to the rule if a value matches criteria defined in a rule. The return value may be used with Index Templates to dynamically assign values in Property Mappings. The Return Value will default the same text entered in the Value field.
Description	An optional description of the value.

4   RULES

Rules are used to specify what items in the source server should be captured. In a Profile, each rule is assigned to a particular location monitored by Email Manager, causing the rule to be applied against any item that is placed in the monitored location. If an item meets a particular rule, the item will be captured according to the Index Template assigned to the rule in the Profile.

To add a new Rule, select Rule in the tree and either click the "New Rule" button in the content pane, right click on the Rules node and select "New Rule…", or from the file menu choose Edit -> New Rule…

To edit an existing Rule, select Rule in the tree and either click the "Edit" button in the content pane, right click on the Rules node and select "Edit…", or from the file menu choose Edit -> Edit…

To copy an existing Rule, select Rule in the tree and either click the "Copy" button in the content pane, right click on the Rules node and select "Copy…", or from the file menu choose Edit -> Copy…

To delete an existing Rule, select Rule in the tree and either click the "Delete" button in the content pane, right click on the Rules node and select "Delete…", or from the file menu choose Edit -> Delete. Note that a Rule that is being used by a Profile cannot be removed.

If Edit or New are selected, the Rule screen is shown, which allows a Rule to be configured.

4.1   Rule

The Rule screen is used to define capture rules. The rules are used to determine what items should be added to the repository.

Field/Section	Description
Rule Name	The name of the rule. The Rule Name will default to "New Rule". Change the name to something more descriptive that indicates what the rule is for. For example, if a rule is being created to capture email from a company called "Acme," name the rule "Acme Rule." The Rule Name is a mandatory field.
Metadata Type	The type of document metadata that may be used in rules. If a metadata type is not selected, no document properties will be available when creating rule clauses.
Return Value	The value that should be returned by the rule (for use by the Index Template) if the rule is true. The value may be a static value (static text up to 255 characters in length) or the value may be determined by the rule clause. If the value is determined by the rule clause, the value is based on the value in the first clause that is true. The clause value is dependent on the type of the clause value. If the value is a text value, the clause value is the text value. If the value is an expression, the clause value is the result of applying the expression to the document property used in the clause. If the value is a list, the clause is the return value of the first item in the list that matches the document property value.

Rules Always True	Selecting this option will cause the rule to always be true. If this option is selected, clauses cannot be entered.

Clauses

Each rule is made up of one or more clauses. The clauses are used to define the logic that determines whether an email message should be captured. Each clause contains a Document Property, Operator, Value and Conjunction.

To add a new Clause, click the "Add" button or right click on the Clauses section and select "Add…".

To edit a new Clause, click the "Edit" button or right click on the Clauses section and select "Edit…".

To remove an existing Clause, select the Clause and click the "Delete" button or right click on the Clause node and select "Delete…".

If Edit or New are selected, the Edit Clause screen is shown, which allows a clause to be configured.

Clauses are evaluated from top to bottom and are grouped together according to placement of the AND conjunctions between clauses. The following table contains samples of how logical expressions may be represented with rule clauses.

Logical Expression	Clause Order Sample
A and B and C	Clause A AND Clause B AND Clause C
A or B or C	Clause A OR Clause B OR Clause C
A and (B or C)	Clause A AND Clause B OR Clause C
A or (B and C)	Clause A OR Clause B AND Clause C
(A and B) or C	Note: if this expression is entered in the order that the items appear in the logical expression, it will actually evaluate as A and (B or C). The expression must be re-formed as the logical equivalent: C or (B and A). Clause C OR Clause B AND Clause A

Edit Clause

When a Document Property is selected, the Operator changes according to the type of Email Property selected.

The Email Property may be one of:

- All Properties: If used in a clause, values in all properties will be compared to the value entered.

- Attachment Flag: Specifies whether or not an item has attachments.

- BCC Address: The email address of users contained in the BCC property. Note that this option is only available for Exchange 2000/2003 (with relevant patches) when using message journaling or Lotus Domino 6.0.3 or higher when using message journaling. In addition, note that although extended characters may be used in the email address display name, the extended characters will not be contained in the email address itself as email addresses are always ASCII text. The BCC Display property should be used when comparing a string with extended characters against an email recipient list.

- BCC Address Domain: The domain name portion of email address contained in the BCC property. Note that this option is only available for Exchange 2000/2003 (with relevant patches) when using message journaling or Lotus Domino 6.0.3 or higher when using message journaling.

- BCC Address User ID: The user id associated with the email address contained in the BCC property. Note that this option is only available for Exchange 2000/2003 (with relevant patches) when using message journaling or Lotus Domino 6.0.3 or higher when using message journaling.

- BCC Display: The display name of users contained in the BCC property. Note that this option is only available for Exchange 2000/2003 (with relevant patches) when using message journaling or Lotus Domino 6.0.3 or higher when using message journaling.

- Body: The body of the email message.

- Captured Date (Local): The date and time that Email Manager starts processing an item, in local time.

- Captured Date (UTC): The date and time that Email Manager starts processing an item, in Universal Time Code time.

- CC Address: The email address of users contained in the CC property. Note that although extended characters may be used in the email address display name, the extended characters will not be contained in the email address itself as email addresses are always ASCII text. The CC Display property should be used when comparing a string with extended characters against an email recipient list.

- CC Address Domain: The domain name portion of email address contained in the CC property

- CC Address User ID: The user id associated with the email address contained in the CC property

- CC Display: The display name of users contained in the CC property.

- Conversation Topic: The Conversation Topic of the email. The Conversation Topic is a property of an email that is used to determine whether an email is a part of a particular thread.

- Email Folder Path: The location of the email on the email server.

- File Size: The size of email (including attachments)

- From Address: The email address of users contained in the From property. Note that although extended characters may be used in the email address display name, the extended characters will not be contained in the email address itself as email addresses are always ASCII text. The From Display property should be used when comparing a string with extended characters against an email recipient list.

- From Address Domain: The domain name portion of email address contained in the From property.

- From Address User ID: The user id associated with the email address contained in the From property

- From Display: The display name of users contained in the From property.

- Item Already Captured: Specifies whether the item has already been captured.

- Item Altered: Specifies whether the content of an email has been altered (i.e. a shortcut has been added).

- Message Class: The type of item currently being processed.

   o For Exchange, the following values may be used:

      ▪ "IPM.Note" (standard email message)

      ▪ "IPM.Task" (task)

      ▪ "IPM.Appointment" (calendar item)

      ▪ "IPM.Post" (public folder post)

      ▪ "IPM.Contact" (contact)

      ▪ Note: if the option "Ignore Read Receipts" is selected in the Exchange Connector configuration options, all forms starting with "REPORT" are ignored. i.e. "REPORT.IPM.Note"

   o For Lotus Domino, the following values may be used:

      ▪ "Memo" (standard email message)

      ▪ "Appointment" (Calendar item)

      ▪ "Task" (Task item)

      ▪ "Reply" (reply to a message)

      ▪ "Phone Message" (phone message)

      ▪ "Notice" (notice item)

      ▪ Note: if the option "Ignore System Messages" is selected in the Lotus Connector configuration options, all items of the following classes are ignored: "Delivery Report", "NonDelivery Report", "Return Receipt", "ReturnNonReceipt", "Trace Report", "Tracking Response", "Quota Report", "Mail Router"

- Originating User ID: when using client capture, the id of the user who initiated the capture of an email. Note that this property is only available when using the Email Manager Client.

- Received Date (Local): The date the email was received, in local time.

- Received Date (UTC): The date the email was received, in Universal Time Code time

- Sent Date (Local): The data the email was sent, in local time.

- Sent Date (UTC): The data the email was sent, in Universal Time Code time

- Subject: The subject line of the email.

- To Address: The email address of users contained in the To property. Note that although extended characters may be used in the email address display name, the extended characters will not be contained in the email address itself as email addresses are always ASCII text. The To Display property should be used when comparing a string with extended characters against an email recipient list.

- To Address Domain: The domain name portion of email address contained in the To property.

- To Address User ID: The user id associated with the email address contained in the To property

- To Display: The display name of users contained in the To property.

- Group (To): A list of LDAP groups that users in the To field belong to.

- Group (From): A list of LDAP groups that users in the From field belong to.

- Group (CC): A list of LDAP groups that users in the CC field belong to.

- Group (BCC): A list of LDAP groups that users in the BCC field belong to. Note that this option is only available for Exchange 2000/2003 (with relevant patches) when using message journaling or Lotus Domino 6.0.3 or higher when using message journaling.

The Operator may be one of:

- Is equal: only shows if an Email Property of type string is selected.

- Not equal: only shows if an Email Property of type string is selected.

- Like: only shows if an Email Property of type string is selected.

- Not like: only shows if an Email Property of type string is selected.

- Is after: only shows if an Email Property of type date is selected.

- Is greater than or equal: only shows if an Email Property of type date is selected.

- Is before: only shows if an Email Property of type date is selected.

- Is less than or equal: only shows if an Email Property of type date is selected.

- Older than: only shows if an Email Property of type date is selected. Note that only UTC dates should be used when using this operator as the system rules component treats all dates in this instance as UTC dates.

- Matches Expression: if selected, the Value may only be a regular expression. Selecting this operator will apply the regular expression to the Email Property selected to determine if it matches.

The Value may be one of:

- Value: shows for all Operators. If the email property value matches the value entered (based on the Operator), the clause is true. Note that when matching quotation marks against a string in a document property, ensure the correct quotation marks are used. For instance, the symbol " does not match the symbol ". Plain text email tends to use the " symbol and RTF/HTML email tend to use the symbol ". For this reason, quotation marks should be used with caution.

- List: shows for all Operators. A list is a list of text values that will be compared to the Email Property value when the rule is evaluated.

- Regular Expression: only shows if the operator Matches Expression is selected. The regular expression will be applied to the Email Property. If the regular expression results in a match in the Email Property, the clause is true. To enter a regular expression, click the "…" button. A new screen will open to allow for entry of the regular expression.

The Conjunction may be one of:

- And: forms a logical "and" relationship between clauses.

- Or: forms a logical "or" relationship between clauses.

At least one clause must be entered. The order in which the clauses appear on the screen is the order in which clauses are evaluated. To change the order of the clauses, use the "up" and "down" buttons on the right side of the screen.

For an email message to meet the criteria specified in the rule, the rule's clauses must evaluate to "true."

5 REPOSITORIES AND INDEX TEMPLATES

The Repositories and Index Templates section contains document repositories that have been registered for use with Email Manager and for each repository type, Index Templates that may be used to define how an item should be indexed in each repository. Note that before adding an index template, a repository must be defined.

To register a new repository, select the repository type in the tree (i.e. FileNet P8 Content Engine or FileNet Content Services) and either click the "New Repository" button in the content pane, right click and select "New Repository…", or from the file menu choose Edit -> New Repository…

To edit an existing repository, select the repository and either click the "Edit" button in the content pane, right click and select "Edit…", or from the file menu choose Edit -> Edit…

To remove an existing repository, select the repository and either click the "Delete" button in the content pane, right click select "Delete…", or from the file menu choose Edit -> Delete. Note that a repository that has associated Index Templates cannot be removed.

If Edit or New are selected, the Repository screen is shown, which allows a repository connection to be configured.

5.1 Repository

The fields shown on the Repository screen will vary based on the repository type being used.

5.1.1 P8 Content Engine Repository

For a P8 CE Object Store, the following fields show:

Field/Section	Description
User	The domain user that Email Manager should use when connecting to the object store to add documents. When using Active Directory, use a fully qualified name (i.e. user@domain.com) or prefix the user name with the domain name (i.e. domain\user).
Password	The password for the User. Click the Refresh Object Stores button to verify whether the User name and Password entered are valid and to retrieve a list of available Object stores.
Object Store	The object store that should be registered for use with Email Manager. A list of all object stores available on the domain will be shown.
Repository Name	The name that should be used to refer to the repository in Email Manager. The name defaults to the display name of the selected Object Store, but may be changed to any name.
P8 Workplace URL (Optional – for Shortcut Use Only)	The URL that should be used when adding a shortcut to a document in the object store. The URL consists of a P8 Workplace link. Replace "server_name" with the name and port of the P8 Application Server that is running Workplace. The tokens <%OBJSTORE%>, <%DOCID%>, and <%OBJTYPE%> must not be altered in the URL as they are required by Email Manager.

5.1.2 Content Services Repository

For a CS Library, the following fields show:

Field/Section	Description
Library	The library that should be registered for use with Email Manager. A list of all libraries configured for use on the Email Manager Server will be shown.
Repository Name	The name that should be used to refer to the repository in Email Manager. The name defaults to the display name of the selected library, but may be changes to any name.
User	The CS library user that Email Manager should use when connecting to the library to add documents.
Password/Confirm Password	The password for the User. Click the Test Logon button to verify whether the User name and Password entered are valid.
Group	The CS group that the user should utilize when logging in to the library.
Panagon Web Services URL (Optional – for Shortcut Use Only)	The URL that should be used when adding a shortcut to a document in the library. The URL consists of a Panagon Web Services link. Replace "server_name" with the name of the server that is running Panagon Web Services. The tokens <%SYSTEM%>, <%SERVER%> and <%DOCID%> must not be altered in the URL as they are required by Email Manager.

Note: If using Content Services for non-English languages, the machine the Content Services Connector is running on requires the code page to match the code page used by the CS server

5.1.3 Image Services Repository

For an IS Library, the following fields show:

Field/Section	Description
Library	The library that should be registered for use with Email Manager. A list of all libraries available on the domain will be shown.
Repository Name	The name that should be used to refer to the repository in Email Manager. The name defaults to the display name of the selected library, but may be changes to any name.
User	The IS library user that Email Manager should use when connecting to the library to add documents.
Password/Confirm Password	The password for the User. Click the Test Logon button to verify whether the User name and Password entered are valid.
Panagon Web Services URL	The URL that should be used when adding a shortcut to a

(Optional – for Shortcut Use Only)	document in the library. The URL consists of a Panagon Web Services link. Replace "server_name" with the name of the server that is running Panagon Web Services. The tokens <%LIBRARY%> and <%DOCID%> must not be altered in the URL as they are required by Email Manager.

5.1.4   File System Repository

The File System repository connection may be used to copy files to a location on the file system. An "index" file will be created to accompany each file that will contain metadata data associated with the file.

For a File System Repository, the following fields show:

Field/Section	Description
Repository Name	The name that should be used to refer to the repository in Email Manager.
Create one index file for document group	If selected, a single index file will be created for each "set" of documents. An example of a set of documents is an email file and its associated attachment files.
Create one index template for each document in document group	If selected, an index file will be created for each document. For example, an index file will be created for the email file and each of its associated attachment files.
Index File Classes	Equivalent to a document class in a FileNet repository. Properties may be defined for each class, which represent fields that will be included in the index file. See below for details on the Index File structure and default properties included in the file. To add new class, click the New button. To edit and existing class, select the class and click the Edit button. To delete an existing class, select the class and click the Delete button. If New or Edit is selected, the Index File Class screen will open.
Index Properties	Properties associated with the Index File Class currently selected. The properties will included in index file as XML tags in the section \metadata_output\property_values To add new property, click the New button. To edit and existing property, select the property and click the Edit button. To delete an existing property, select the property and click the Delete button. If New or Edit is selected, the Index Property screen will open.

5.1.4.1   Index File Overview

The Index File created to contain metadata related to a document, or set of documents, is an XML file. A number of default properties are included in the Index File:

Property Name	XPath	Description
metadata_output	\metadata_output	The root of the xml file. All other nodes are contained below this node.
Property_values	\metadata_output\property_values	User defined Index Properties. These are equivalent to custom properties in a FileNet repository. Each Index Property has a tag below the property_value tag.
Original_filename	\metadata_output\original_filename	The original location and name of the captured file.
File_count	\metadata_output\ file_count	The number of files the Index File is associated with. i.e. if and email has a single attachment and both the email file and attachment file are being captured, the file_count will be two.
Directory	\metadata_output\directory	The location on the file system the file associated with the Index File has been stored.
Files	\metadata_output\ files	A list of files that are associated with the Index File.

The following is an example of and index file where user defined Index Properties "string_custom_property", "date_custom_property", "number_custom_property" and "multivalue_custom_property" have been defined:

```
<metadata_output>
   <property_values>
       <string_custom_property>Sample index file</string_custom_property>
       <date_custom_property>12/23/2005 17:42:28</date_custom_property>
       <number_custom_property>19</number_custom_property>
       <multivalue_custom_property>
          <value>keyword one</value>
          <value>keyword two</value>
       </multivalue_custom_property>
   </property_values>
   <original_file>c:\files\Fs.DBD5464F-E30E-48C9-85D2-2EC30BB7D2F0.msg</original_file>
   <file_count>2</file_count>
   <directory>C:\fs conn</directory>
   <files>
       <value>Fs.DBD5464F-E30E-48C9-85D2-2EC30BB7D2F0.msg</value>
       <value>an_attachment.txt.DBD5464F-E30E-48C9-85D2-2EC30BB7D2F0.0.txt</value>
   </files>
</metadata_output>
```

5.1.4.2   Index File Class

The Index File Class screen may be used to define an Index File Class, which is equivalent to a document class in a FileNet repository.

The following fields are shown on the screen:

Field/Section	Description
Display Name	The display name of the class. The value will be used when selecting a Document Class in an Index Template.
System Name	The internal system name of the class. This value cannot be edited.

5.1.4.3   Index Property

The Index Property screen may be used to define an Index Property.

The following fields are shown on the screen:

Field/Section	Description
Display Name	The display name of the property. The value will be used when selecting properties in Index Templates and Rules.
System Name	The internal system name of the property. This value cannot be edited. The System Name value will be used to name the tag for the property in the Index File.
Data Type	The type of data that the property will contain. Either: Date/Time, Number or String may be selected.
Date Format	The format that should be used when writing dates to the index file. This field is only available if the Data Type is "Date/Time". To specify the date format, used the following tokens. Note that tokens are case sensitive. M = Months as 1 – 12 MM = Months as 01 – 12 MMM = Months as Jan – Dec MMMM = Months as January – December d = Days as 1 – 31 dd = Days as 01 – 31 ddd = Days as Mon – Sun dddd = Days as Monday – Sunday y = Years as 1, 2, … , 99

	yy = Years as 00 – 99
	yyyy = Years as 1900 – 9999
	h = Hours as 0 – 12
	hh = Hours as 00 – 12
	H = Hours as 0 – 23
	HH = Hours as 00 – 23
	m = Minutes as 0 – 59
	mm = Minutes as 00 – 59
	s = Seconds as 0 – 59
	ss = Seconds as 00 – 59
	tt = AM/PM
	t = A/P
	For date and time separators, use a "\" to escape the characters. For instance, if "/" is used to separate date value and ":" is used to separate time valued, the date format should be entered as follows:
	MM\/dd\/yyyy HH\:mm\:ss
Size	The maximum size of a string value contained in the property. This field is only available if the Data Type is "String".
Value Required	If selected, a value must be supplied for the property.

Multiple Values	If selected, more than one value may be assigned to the property. This is equivalent to a multi-value property in a FileNet repository.
	
	In the Index File, a <value> tag will be used to delimit each value assigned to the property.
	
	i.e. if the System Name is <mv_property> and the values 'one' and 'two' will be assigned to the property, the values will be represented as follows in the Index File:
	
	`<mv_property>`
	`    <value>one</value>`
	`    <value>two</value>`
	`</mv_property>`

5.2   Index Templates

For each repository defined, a set of Index Templates may be created. Index Templates may be used within Profiles to specify the document repository and email message should be stored in as well as the properties and security settings that should be assigned to the email.

To add a new Index Template, select the Index Templates node below a repository and click the "New Index Template" button in the content pane, right click on the Index Templates node and select "New Index Template…", or from the file menu choose Edit -> New Index Template…

To edit an existing Index Template, click the "Edit" button in the content pane, right click on the Index Templates node and select "Edit…", or from the file menu choose Edit -> Edit…

To copy an existing Index Template, click the "Copy" button in the content pane, right click on the Index Templates node and select "Copy…", or from the file menu choose Edit -> Copy…

To delete an existing Index Template, click the "Delete" button in the content pane, right click on the Index Templates node and select "Delete…", or from the file menu choose Edit -> Delete. Note that an Index Templates that is being used by a Profile cannot be removed.

If Edit or New are selected, the Index Template screen is shown, which allows an Index Template to be configured.

Each Index Template consists of: General Settings, Property Mappings, Record Declaration (Optional), Permission Mappings, and Client Access Security (if the Index Template is for client use).

5.2.1   General Settings

Field/Section	Description
Index Template Name	The name of the Index Template. The name must be unique.
Metadata Type	The type of document metadata that may be mapped to repository properties. If a metadata type is not selected, no document properties will be available for mapping to repository properties.
Repository	The repository that documents should be added to. This is a display only field.
Repository Folder(s) to Add Item	The folders on the selected Repository that email should be filed in. Selecting a folder is optional. To add a folder, click the New button. To edit an existing folder setting, select the folder and click Edit. To delete an existing folder setting, select the folder and click delete. If New or Edit is selected, the Select Folder screen will show.
Create folder if it does not exist	If selected, if the Repository Folder specified does not exist, it will be created. This option is only available for P8 Content Engine.
Add document as minor version	If selected, an item will be added to P8 Content Engine as a minor version. If the flag is not selected, an item will be added as a major version.

Declare as Record	If selected, the section Record Declaration will be enabled to allow record declaration options to be configured. This option is only available for P8 CE 3.x repositories that have Records Manager installed.
For Client Use	If selected, the Index Template may be used within Client Profiles.
Prompt user with template	If selected, in the Email Manager Client, the user will be prompted when the Client Profile is selected.
Share template with other users	If selected, users other than the user who created the template will have access to the template.

5.2.1.1   Select Folder

The Select Folder screen may be used to either select an existing folder to file documents or, if P8 Content Engine is being used, specify a dynamic folder assignment.

Field/Section	Description
Select Existing Folder	If selected, the screen will show in Select Existing Folder mode, which will allow an existing folder in the document repository to be selected.
Advanced Folder Definition	If selected, the screen will show in Advanced Folder Selection mode, which will allow the folder name to be based the value of a document property, static value, calculated value or regular expression applied to a document property. This option is only available if P8 CE is being used.

Select Existing Folder Mode

Field/Section	Description
Select Existing Folder	If selected, the screen will show in Select Existing Folder mode, which will allow an existing folder in the document repository to be selected.

Advanced Folder Definition Mode

Field/Section	Description
Document Property Value	Select a document property that should be mapped to the folder name.
Literal Value	Enter or select a static value to assign to the folder name
Calculated Value	A concatenation of document properties and static values that will be used to determine the folder name. To edit a Calculated Value, click the "…" button.
Regular Expressions	To determine the folder name, a value may be extracted from a document property by applying a regular expression to a document property. To enter regular expressions, click the "…" button.

5.2.2   Property Mappings

Field/Section	Description
Document Class	The document class to use when capturing email. All document classes for the repository selected in the General Settings are listed.
Property Mappings	A list of Properties (including custom properties) configured for the Document Class selected. A "*****" next to the name is used to indicate Properties that are mandatory. A value may be assigned to the property by double clicking next to property or clicking the Add button. The Property Mapping Value screen will show to allow a value to be specified.
Link Captured Files	Selecting this option will the main email file with attachment files in the repository. Note that this option is only available if the "Email'" document class or a sub-class of the Email class is selected.

Property Mapping Value

The Property Mapping Value screen may be used to assign a value to a repository property. Either a document property may be selected, a literal value may be specified, a calculated value may be specified or a regular expression may be specified.

Field/Section	Description
Document Property Value	Select a document property that should be mapped to the repository property. Only document properties that are compatible with the data type of the repository property are shown.
Literal Value	Enter or select a static value. Only values that match the data type of the repository property may be entered.
Calculated Value	A concatenation of email properties and static values. To edit a Calculated Value, click the "…" button.
Regular Expressions	A value may be extracted from a document property by applying a regular expression to the document property. To enter regular expressions, click the "…" button.

Calculated values and regular expressions may not be created or edited in the Email Manager Client. Any property/value mapping that contains a calculated value or regular expression will be read only in the Email Manager Client.

P8 Notes:

- For P8 Index Templates, when creating property mappings for date properties, UTC dates must be used. The date will be stored internally as UTC, but will be converted to local time in Workplace.

- When dynamically assigning values to a property that has a choice list associated with it (i.e. extracting a value from the path), ensure the dynamic value will be in the correct case as choice lists are case sensitive. One method of doing this is to verify case of the metadata value matches the case expected by the choice list.

Note: although extended characters may be used in the email address display name, the extended characters will not be contained in the email address itself as email addresses are always ASCII text. The BCC/CC/To/From Display property should be used when mapping to a document repository field to ensure extended characters are preserved..

Edit Calculated Value

The Edit Calculated Value screen is used to edit calculated values. Select the values and operation to be performed between each value.

Field/Section	Description
Value	The type of value entered is dependent on the data type of the repository property the calculated value is being assigned to. For strings, a value may be one of: • string value • document property For numbers, a value may be a number value. For dates, a value may be: • number value • date document property For dates, one document property must be selected and one number value must be entered.
Operator	The operator displayed is dependent on the data type of the repository property the calculated value is being assigned to. Strings: • + : will concatenate values together Numbers: • + : will add values together • - : will subtract values • * : will multiply values • / : will divide values

	Dates:
	• + Day: will add the number of days specified to the date property
	• + Month: will add the number of months specified to the date property
	• + Year: will add the number of years specified to the date property
	• - Day: will add the number of days specified to the date property
	• - Month: will add the number of months specified to the date property
	- Year: will add the number of years specified to the date property

Edit Regular Expressions

The Edit Regular Expression screen allows a regular expression to be created.

Field/Section	Description
Document Property	The document property the regular expression should be applied to.
Replace Expression	If selected, a regular expression may be created in replace mode. In replace mode, a match that occurs within a regular expression may be replaced or augmented with additional text.
Matches Expression	If selected, a regular expression may be created in match mode. In match mode, the result of applying the regular expression is the string that matches the expression.

The following fields appear in Replace mode:

Field/Section	Description
Document Property	The document property the regular expression should be applied to.
Replacement Expression	The regular expression to apply to the document property selected. Standard regular expression syntax may be used.
Replacement String	The match or sub-match to extract from the regular expression. A match is defined in the regular expression by enclosing the relevant part of the expression in parentheses. A specific match is denoted by a "$" followed by the match number. i.e. $1 represents the first match
Default Value	In the case the regular expression entered does not match any text in the document property selected; the value entered in Default Value will be used.
Validate	Click the Validate button to check whether the value entered in

	the Regular Expression field is valid.
Test Value	Enter a test value to which the Regular Expression entered will be applied to when the Test button is clicked.
Matches	Shows what characters in Test Value produce a match.
Result	The result of applying the Regular Expression and Replacement String entered to the Test Value entered.
Test	Click the Test button to apply the Regular Expression and Replacement String to the value entered in Test Value. The resulting match will appear in the Test Result field. If there is no match, the text "No Match" will appear.

The following fields appear in Match mode:

Field/Section	Description
Matches Expression	The regular expression to apply to the document property selected. Standard regular expression syntax may be used.
Default Value	In the case the regular expression entered does not match any text in the document property selected, the value entered in Default Value will be used.
Validate	Click the Validate button to check whether the value entered in the Regular Expression field is valid.
Test Value	Enter a test value to which the Regular Expression entered will be applied to when the Test button is clicked.
Matches	Shows what characters in Test Value produce a match.
Test Result	The result of applying the Regular Expression entered to the Test Value entered.
Test	Click the Test button to apply the Regular Expression to the value entered in Test Value. The resulting match will appear in the Test Result field. If there is no match, the text "No Match" will appear.

5.2.3   Record Declaration

The Record Declaration section allows properties related to declaring a record in P8 Records Manager to be configured. P8 Records Manager must be installed and configured to declare a record.

Field/Section	Description
File Plan Object Store	The file plan Object Store that the record should be declared in.
Record Class	The record class to use when declaring the record. Click the "…" button to select a record class.

Classification	The classification(s) that should be used when declaring a record. To add a classification, click the add classification button. To remove a classification, click the remove classifications button. The classification may be a static value or the may be dynamically assigned (i.e. based on the name of the folder an item is located in).
Property Mappings	A list of Properties (including custom properties) configured for the record class selected. A "*" next to the name is used to indicate Properties that are mandatory. A value may be assigned to the property by double clicking next to property or click in the "add" icon. The Property Mapping Value screen will show to allow a value to be specified.

Please note the following when using Records Manager with Email Manager:

- Java must be installed on the Email Manager server. As well, the Record Manager API must be installed (See the Email Manager Setup Guide for details).

- The P8 user defined in the Repository configuration must be granted specific permissions to access Record Classes in the file plan object store. These permissions are not assigned by default, even if the P8 user is the creator and administrator of the object store (See the Email Manager Setup Guide for details).

- When creating a custom property for use with an RM 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.

- When a record is declared, "Document Location" is a property that is set on the declared record. The Document Location is a URL that references the CE server that the document being declared as a record is located on. The Document Location URL is in the format: http://<servername>:8080/ApplicationEngine/xcmisasoap.dll where <servername> is the name of the Content Engine server.

  Assumption 1:

  The name of the Content Engine server is derived by taking the name of the first computer that appears in the "Domain" list of the Object Store the document is located in. If there are multiple computers in the Domain list, the first one will be used and the other names will be ignored.

  Assumption 2:

  The port number is assumed to be "8080".

- If a metadata property is mapped to the mandatory property in a Record Class, ensure the metadata property always has a value. If the mandatory property is not assigned a value, the record declaration will fail.

5.2.3.1 Select Classification

The Select Classification screen may be used to either select an existing classification or to dynamically specify a classification assignment.

Field/Section	Description

Select Existing Classification	If selected, the screen will show in Select Existing Classification mode, which will allow an existing classification in RM to be selected.
Advanced Classification Definition	If selected, the screen will show in Advanced Classification Selection mode, which will allow the classification name to be based the value of a document property, static value, calculated value or regular expression applied to a document property.
	The name that is dynamically determined must be the full classification path (i.e. \Records Management\Data\Inventory) and must exist as a classification in RM. The system will not create items in the file plan. If a classification does not exist, an error will be logged by the system.

Select Existing Classification Mode

Field/Section	Description
Select Existing Classification	If selected, the screen will show in Select Existing Classification mode, which will allow an existing classification in the file plan to be selected.

Advanced Folder Definition Mode

Field/Section	Description
Document Property Value	Select a document property that should be mapped to the classification name.
Literal Value	Enter or select a static value to assign to the classification name
Calculated Value	A concatenation of document properties and static values that will be used to determine the classification name. To edit Calculated Value, click the "…" button.
Regular Expressions	To determine the classification name, a value may be extracted from a document property by applying a regular expression to a document property. To enter regular expressions, click the "…" button.

5.2.4   Permission Mappings

The Permission Mappings section of the Index Template is used to specify the security that should be applied to a document when it is added to a repository. Depending on the type of repository being used, the Permission Mappings section will vary in appearance.

Security privileges may be created based on Email Properties, document repository Users and document repository Groups. Security privileges based on Email Property assign the indicated access level to all users whose name appears in the Email Property selected (either To, From, or CC).

Note: The email server user name and the document repository user name must be identical in order to take advantage of this feature. Security privileges based on document repository Users assign the indicated access level to the document repository user specified. Security privileges based on document repository Groups assign the indicated access level to the document repository group specified.

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

To update a Security setting, select an item in the Security grid and click the **Add** button.

To remove a Security setting, select an item in the Security grid and click the **Delete** button.

P8 Content Engine Permission Mappings

Field/Section	Description
Security Grid	The Document Security grid shows all the access privileges that have been created. The grid shows the Type of the access privilege (either Email Property, User or Group), the Name (either the email property name, user name or group name) and the access level assigned.
	To edit an existing security setting, select the item and click the Edit button. To remove an existing security setting, select the item and click the Delete button.
Email Property/Users/Groups Radio Buttons	When adding Security privileges, select the item that the access privilege will be based on.
	Selecting Email Property will cause the Email Property combo box to show, which will be populated with a list of Email Properties that security settings can be derived from (To, From, and CC).
	Selecting Users will show search fields that will allow a domain user to be searched for.
	Selecting Groups will show search fields that will allow a domain group to be searched for.
Search In	The domain to search for users/groups in.
Starts with	The characters that the user/group name starts with.
Search	Clicking this button will search the domain indicated in "Search In" for user/group names with the value entered in "Starts with".
Search Result	A list of user/groups that match the search criteria.
Access Levels	The access level to assign to the item selected (either Email Property, Group, or User).
	For P8 Content Engine, valid access levels are: Owner Control, Promote Version, Modify Content, Modify Properties, View Content, View Properties, Publish. A combination of these access levels may be selected for each user/group.
Add	Click the Add button to add the selected item with the access level specified to the Security Grid.

Content Services Permission Mappings

Field/Section	Description
Document Security Grid	The Document Security grid shows all the access privileges that have been created. The grid shows the Type of the access privilege (either Email Property, User or Group), the Name (either the email property name, user name or group name) and the access level assigned (either None, Viewer, Author, Owner or Admin). To edit an existing security setting, select the item and click the Edit button. To remove an existing security setting, select the item and click the Delete button.
Email Property/Users/Groups Radio Buttons	When adding Security privileges, select the item that the access privilege will be based on. Selecting Email Property will populate the Name combo box with a list of Email Properties that security settings can be derived from (To, From, and CC). Selecting Users will populate the Name list box with a list of document repository Users. Selecting Groups will populate the Name list box with a list of document repository Groups.
Access Level	The access level to assign to the item selected in the Name combo box. For FileNet Content Services, valid access levels are: None, Viewer, Author, Owner or Admin. Only one of these access levels may be selected for each user/group.
Add	Click the Add button to add the selected item with the access level specified to the Security Grid.

Image Services Permission Mappings

Field/Section	Description
Read	The user or group "Read" permissions should be assigned to. Click the "…" to select a user or group.
Write	The user or group "Write" permissions should be assigned to. Click the "…" to select a user or group.
Execute	The user or group "Execute" permissions should be assigned to. Click the "…" to select a user or group.

5.2.5   Client Access Security

The Client Access Security sections may be used to specify what users or groups have access to the Index Template when using the Email Manager Client. This option is only enabled if Index Template is for "client use".

Security privileges may be created based on document repository Users or document repository Groups. The security privileges selected determine the type of access a user or group will have to the Index Template.

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

To update a Security setting, select an item in the Security grid and click the **Add** button.

To remove a Security setting, select an item in the Security grid and click the **Delete** button.

6 SOURCE SERVERS AND PROFILES

The Source Servers and Profiles section contains source systems (i.e. email servers or PST archives) that will be monitored for email and Profiles that will be used to define what email should be captured.

6.1 Email Server Connector Configuration

The Email Server Connector configuration screen is used to specify general configuration settings for the Email Connector.

To update configuration options related to an email server connector (i.e. Exchange or Lotus Notes), select the node for the email server connector below the "Source Servers and Profiles" node, and either click the "Edit" button in the content pane, right click and select "Edit", or from the file menu choose Edit -> Edit...

6.1.1 General Settings

The General Settings section contains the following fields:

Field/Section	Description
Enable Notifications	Specifies whether an Exchange Server should send Email Manager notifications of new email messages. This option is only available for Exchange Server.
Polling Interval (seconds)	The number of seconds that Email Manager should wait before polling the email server for new data. For Exchange Server, if Enable Notifications is selected, in most cases email will be captured via notifications, but for those emails that do not trigger a notification, the polling interval is utilized.
Client Queue Polling Interval (seconds)	The number of seconds that Email Manager should wait before polling the email server for new data in the Client Queue. The Client Queue is the GroupWise Account that has been created to temporarily store email captured via the Email Manager Client. This option is available for the GroupWise Connector only.
Ignore Read Receipts	If this option is selected, read receipts will be ignored when Email Manager is processing email on the email server. This includes all Exchange forms that start with the prefix "REPORT". i.e. "REPORT.IPM.Note" This option is only available for Exchange Servers.
Ignore System Messages	This option is only available for Lotus Domino Servers. If this option is selected, systems messages, such as auto reply, trace, delivery and read receipts, will be ignored when Email Manager is processing email on the email server. This includes items of the following class: "Delivery Report",

	"NonDelivery Report", "Return Receipt", "ReturnNonReceipt", "Trace Report", "Tracking Response", "Quota Report", "Mail Router"
Attachment Name Prefix	The prefix that will be used for attachment names and files.
Lotus Connection Password	The password that the user that the Lotus Connector is configured to use should use to connect to the Lotus Domino server.
Resolve addresses in distribution lists	If selected, for distribution lists specified in an email recipient list (to/from/cc fields), the members of the distribution list will be resolved and added to the recipient metadata. If this option is not selected, the distribution list will not be resolved and the name of list will appear in the recipient metadata.
Email Shortcut Text	The descriptive text that will be added to an email on the email server when a shortcut is created to a captured email.
Attachment Shortcut Text	The descriptive text that will be added to an email on the email server when a shortcut is created to a captured attachment.
Blank Subject Line Text	When an email is captured, the text that will be used for the email subject line if the subject line is blank.
Advanced Options	Click the Advanced Options button to configure advanced setting related to the Email Connector.

6.1.1.1   Advanced Options

The Advanced Options screen contains configuration settings that will alter default behavior of the Email Connector. Use extreme caution when updating these settings. The settings should only be updated by an administrator who thoroughly understands the consequences of changing a value associated with a configuration parameter.

Exchange Connector Advanced Options

Field/Section	Description
Processing threads	The number of concurrent items that should be processed. Increasing this value will require more system resources to be used. Decreasing this value will reduce system efficiency as the full capacity of the hardware and dependent systems will not be utilized.
Processing queue size	The number of items that are queued for processing. It is recommended this value be set to the same value assigned to Processing threads.
Save plain text email with formatting	If selected, when saving email in plain text format, it will be generated as a multi-part MIME message with an HTML body. This is equivalent to the EML format utilized by Microsoft Outlook Web Access.

Generate plain text shortcuts	If selected, if shortcuts are added to an email, the email will be converted to plain text format. This option must be enabled under certain conditions when using Outlook 2000 on client desktops.
Reduced MSG file size	If selected, the size of an MSG file created by the Exchange Connector will be reduced by removing redundant copies of the email body from the file. By default, all MSG files include the plain text, HTML and RTF versions of the email body. The Reduce MSG File Size option will only include the email body format that the email sender originally used. By selecting this flag, the option to switch the format of the email in Outlook will no longer be available.
Save metadata to folder	If selected, metadata associated with an email item will be written to the Email Manager temporary location folder. The temporary location is defined in the Configuration Options screen.
Enable extended trace logging	If selected and the system Log Level is set to "Trace", an extended form of trace logging will be enabled. This option should only be enabled for troubleshooting purposes as the log files produced will be extremely large.
Save Email in Unicode Format (Outlook 2003 only)	If selected, email will be saved in Unicode format. This option is only available for Exchange Server with Outlook 2003. Note that any email saved in Unicode format will not be readable in older versions of Outlook (Outlook 2000 and Outlook 2002).

Lotus Connector Advanced Options

Field/Section	Description
Processing Threads	The maximum number of concurrent items that can be processed by the system. Each thread requires a connection to Lotus Notes and uses memory and system resources.
Processing queue wait threshold	If the number of items in the processing queue exceeds the value entered, the Lotus Connector will not add additional items to the queue until the number of items in the queue is below the threshold value. This functionality is only available when the "Do not crawl if queue size over threshold" is selected.
Do not crawl if queue size over threshold	If this option is selected, when the next polling interval or scheduled run time for the Lotus Connector occurs, it will not attempt to query the monitored locations for more items if the number of items currently queued for processing exceeds the "Processing queue wait threshold". This option may be used to prevent the Lotus Connector from executing queries while the queue contains a backlog of items that are waiting for processing, therefore helping to improve overall performance of the system. This option is enabled

	by default.
Cache Server	The Lotus Connector cache database is usually co-located with the Lotus Connector but it can be managed by a Domino server. Leave blank if the cache database is stored locally, or specify the Domino server name where the cache database is located.
Cache Database Path	The location of the cached database on the Cache Server. i.e. i.e. Folder\dbname.nsf The default location is: eMgr\Cache.nsf The Lotus Connector 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.
Use Public Address Book	If selected, the Public address book will be used to resolve data in email recipient fields. This option is selected by default.
Use Private Address Book	If selected, the Private address book will be used to resolve data in email recipient fields. Use the private address book in conjunction with the public address book if there is a need to control how specific addresses are resolved (the private address book takes precedence). Use just the private address book if there is a need resolving a subset of the addresses in the public address book (e.g. in a departmental deployment).
Address Security Property	When using email recipients to set security on items in a document repository, the value in the Lotus item property entered will be used to represent the ID's of document repository users. The default property is "ShortName". Consult Lotus Domino documentation for details on other properties available for an item in a Domino database.
Icon Change Mode	When updating the icon on an item in a database to indicate whether an item has been captured, two options for the icon that is used are available (both may be used) : • Notes mail icon column: a standard Notes icon is displayed in the column that is usually used to indicate if a document contains attachments. This option works with both standard and custom Notes templates. The icon to use may be specified in the Icon Number field. • Custom template icon: an item is added to the document that causes a custom FileNet icon to be displayed in a separate column. This option requires a minor change to the mailbox template to display the icon. See the "eMgr Mailbox Enabler Template" and "eMgr Mailbox Template" for further details.
Icon Number	If "Notes mail icon column" is selected, the number of the icon that will be used to indicate an item has been captured. The default

	value corresponds to the default "archive" indicator in Lotus Notes. Consult Lotus Notes Designer documentation for a list of available icons and associated icon numbers.
Crawler View (Profile)	Specifies a custom view that should be used when crawling a database if the profile does not specify monitored sub-locations. If this value is blank or the specified view is not available, the crawler will locate documents using a select condition. To use this option, a hidden custom view containing specific columns must be deployed in the database being crawled. See the "eMgr Mailbox Enabler Template" for a sample view and further details.
Crawler View (Client Database)	Specifies a custom view that should be used when processing items queued for capture using the Email Manager Client. If this value is blank or the specified view is not available, the client crawler will locate documents using a select condition.
Enable Client Capture	If selected, support for Email Manager Client capture is enabled. This option can be disabled if the Email Manager Client is not deployed. Otherwise, it should only be used to temporarily disable client capture for troubleshooting purposes.
Save Metadata To Folder	If selected, metadata associated with an email item will be written to the folder specified in Save Metadata Path. This option should only be enabled for troubleshooting purposes only.
Save Metadata Path	If selected, metadata associated with an email item will be written to the folder specified in Save Metadata Path as an XML file. This option should only be enabled for troubleshooting purposes.
Delete Exported Files	If selected, temporary files created by the Lotus Connector (the exported version of emails and attachments) will be deleted. This option is enabled by default. The option should only be disabled for troubleshooting purposes.
Cache Cleanup Mode	After an item is processed by the Lotus Connector, the temporary diagnostic information in the cache database may either be deleted, compacted (left in the database but reduced in size) or left as is. This option should be set to "Delete", except for troubleshooting purposes.
Enable extended trace logging	If selected and the system wide Log Level is set to "Trace", an extended form of trace logging will be enabled. This option should only be enabled for troubleshooting purposes as the log files produced will be extremely large.

PST Connector Advanced Options

Field/Section	Description
Processing threads	The number of concurrent items that should be processed. Increasing this value will require more system resources to be used. Decreasing this value will reduce system efficiency as the full capacity of the hardware and dependent systems will not be utilized.
Processing queue size	The number of items that are queued for processing. It is recommended this value be set to the same value assigned to Processing threads.
Save plain text email with formatting	If selected, when saving email in plain text format, it will be generated as a multi-part MIME message with an HTML body. This is equivalent to the EML format utilized by Microsoft Outlook Web Access.
Generate plain text shortcuts	If selected, if shortcuts are added to an email, the email will be converted to plain text format. This option must be enabled under certain conditions when using Outlook 2000 on client desktops.
Reduced MSG file size	If selected, the size of an MSG file created by the PST Connector will be reduced by removing redundant copies of the email body from the file. By default, all MSG files include the plain text, HTML and RTF versions of the email body. The Reduce MSG File Size option will only include the email body format that the email sender originally used. By selecting this flag, the option to switch the format of the email in Outlook will no longer be available.
Save metadata to folder	If selected, metadata associated with an email item will be written to the Email Manager temporary location folder. The temporary location is defined in the Configuration Options screen.
Enable extended trace logging	If selected and the system Log Level is set to "Trace", an extended form of trace logging will be enabled. This option should only be enabled for troubleshooting purposes as the log files produced will be extremely large.
Save Email in Unicode Format (Outlook 2003 only)	If selected, email will be saved in Unicode format. This option is only available for Exchange Server with Outlook 2003. Note that any email saved in Unicode format will not be readable in older versions of Outlook (Outlook 2000 and Outlook 2002).

GroupWise Connector Advanced Options

Field/Section	Description
Processing threads	The number of concurrent items that should be processed. Increasing this value will require more system resources to be used. Decreasing this value will reduce system efficiency as the full capacity of the hardware and dependent systems will not be utilized.
Processing queue size	The number of items that are queued for processing. It is recommended this value be set to the same value assigned to Processing threads.
Save metadata to folder	If selected, metadata associated with an email item will be written to the Email Manager temporary location folder. The temporary location is defined in the Configuration Options screen.
Enable extended trace logging	If selected and the system Log Level is set to "Trace", an extended form of trace logging will be enabled. This option should only be enabled for troubleshooting purposes as the log files produced will be extremely large.

6.1.2   Processing Options/Captured Items

The Processing Options for Captured Items section is used to configure settings that apply to an email if the email is selected for capture. The settings only apply to the email on the email server and not the email file that is added to the repository.

Note that processing option may be overridden in each profile.

Deletion Options

Field/Section	Description
Delete email from capture location	If selected, the email will be deleted from the email server in the location that the Email Connector found the email.
Delete email from mailboxes of all recipients	If selected, the email will be deleted from the mailboxes of all users the email was sent to. If this option is selected, the rest of the processing options will not be applied.
Leave email in capture location	If selected, the email will not be deleted from the location the Email Connector found the email.

Notification Options

Field/Section	Description
Change icon in capture location	If selected, the icon will be changed for the email on the email server in the location that the Email Connector found the email.
	For Exchange Server, an organizational form must be deployed to support the icon change in user mailboxes. In addition, the icon change will only occur for items that appear in the Inbox or Sent Items folder in a user's mailbox.
	For Lotus Notes, the default Lotus Notes "archive" indicator will be used. Customized Lotus Notes mail templates must deployed to support customized icons.
	This option is not available for GroupWise.
Change icon in mailboxes of all recipients	If selected, the icon will be changed for the email in the mailboxes of all users the email was sent to.
	To determine the location of the mail box of all users who are in the recipient list of an email, the Lotus Connector will look up the user in the address book, determine the name of the server the user's mailbox is location on and connect to that server to apply the post processing option. The following must be true to support icon change for users on other servers:
	• All users are in the address book on the server the Lotus Connecter is connecting to
	• The Notes user the Lotus Connector is running as has access to the other servers
	This option is not available for GroupWise.
Mark email in capture location as captured	If selected, the email on the email server in the location that the Email Connector found the email will be marked as "captured". The "Item Already Captured" option in rules as well as the "Ignore Items Already Captured" flag in a Profile may be used to determine whether an email should be captured again..
Mark email in mailboxes of all recipients as captured	If selected, the email will be marked as "captured" in the mailboxes of all users the email was sent to

Attachment Options

Field/Section	Description
Remove attachments from email in capture location	If selected, attachments will be removed from the email on the email server in the location that the Email Connector found the email. This option is not available for GroupWise.
Remove attachments from email in mailboxes of all recipients	If selected, attachments will be removed from the email in the mailboxes of all users the email was sent to. This option is not available for GroupWise.

Shortcut Options

Field/Section	Description
Enable shortcuts for email in capture location	If selected, shortcut options will be enabled for email on the email server in the location that the Email Connector found the email. The shortcut consists of a URL link to a document in the document repository. This option is not available for GroupWise.
Enable shortcuts for email in mailboxes of all recipients	If selected, shortcut options will be enabled for email in the mailboxes of all users the email was sent to. This option is not available for GroupWise.
Shortcut location in email	Specifies where, relative to the email body, the shortcut should be placed. Valid options are: • After Body • Before Body This option is not available for GroupWise.
Add shortcut to captured email in document repository	If selected, a shortcut to the copy of the email in the document repository will be created in the email on the email server. This option is not available for GroupWise.
Leave Email Body	If selected, the email body will be left intact when adding shortcuts. This option is not available for GroupWise.
Remove Email Body	If selected, the email body will be removed completely when adding shortcuts. This option is not available for GroupWise.

Number of characters in body to leave	If selected, the number of characters specified will be left in the email body when adding shortcuts. Note that if this option is selected, the email format for the remaining text will be changed to plain text. This option is not available for GroupWise.

Shortcut Functionality Notes:

- When using Lotus Domino:
  - o Shortcut functionality is only available if Lotus Notes client 6.0.2 or higher is used on the Email Manager Server. End users may be using older versions or the Notes client.
  - o If an attachment is left in an email and the shortcuts option for attachments is enabled, the attachment in the email will lose its icon, but will still be available as an attachment in the email.
- When adding shortcuts to Email in RTF format, if the option to truncate part of the email body (but not the entire body) is selected, the email will be converted to plain text.

6.1.3   Processing Options/Items Not Captured

The Processing Options for Items Not Captured section is used to configure settings that apply to an email if the email is not selected for capture.

Field/Section	Description
Delete email in monitored location	If selected, the email will be deleted from the email server in the location that the Email Connector found the email.
Delete email from mailboxes of all recipients	If selected, the email will be deleted from the mailboxes of all users the email was sent to.
Leave email in capture location	If selected, the email will not be deleted from the location the Email Connector found the email.

6.1.4   Processing Options/Error Item Options

The Error Item Options section is used to configure settings that apply to an email if an unexpected error occurs during processing on an email.

Field/Section	Description
Move email to default location	If selected, the email will be moved to the default location within the email server. This option is not available for GroupWise.
Move email to error location on file	If selected, the email will be moved to the location specified on

system	the file system. This option will only apply if the Email Connector is able to create an email file. If the Email Connector is not able to create an email file, the email will be moved to a default location within the email server.

6.1.5   Scheduling Options

Scheduling options are used to specify when a "scheduled profile" should run. The options only apply to "scheduled profiles" and not other profile types.

Field/Section	Description
This profile should run	Specifies type of schedule. Based on the type of schedule selected, different options will appear on the screen. Values that may be selected include: • Always: the scheduled profile will run continuously. • Once: the scheduled profile will run only once. • Daily: the scheduled profile will run on a daily basis at a specific time. • Interval: the scheduled profile will run at a specific time interval. • Weekly: the scheduled profile will run on a weekly basis at a specific time. • Monthly: the scheduled profile will run on a monthly basis at a specific time.

Run "Once" Options

Field/Section	Description
Run On	Select the date the profile should run. By default, the date is set to today's date.
Run Period	The time the profile should start running and how long the task should run for.

Run "Daily" Options

Field/Section	Description
Run Period	The time the profile should start running and how long the task should run for.

Run at "Interval" Options

Field/Section	Description

Schedule Interval	Number of seconds/minutes/hours/days between each run of the profile.

Run "Weekly" Options

Field/Section	Description
Schedule Weekly	The days of the week the profile should run.
Run Period	The time the profile should start running and how long the task should run for.

Run "Monthly" Options

Field/Section	Description
Schedule Monthly	The days of the month the profile should run.
Run Period	The time the profile should start running and how long the task should run for.

6.1.6   Audit Log Settings

The Audit Log Settings section may be used to configure system audit logs. The audit log will contain one row for each item the system attempts to capture and will indicate whether the item was successfully captured.

Field/Section	Description
Enable audit logging	If selected, audit logging will be enabled.
Folder to save audit logs to	The folder on the file system that audit logs will be created in.
Create new audit log for each profile	If selected, an audit log file will be created for each profile.
Maximum file size (kilobytes)	The maximum size that an audit log file should grow to before a new file is created.
Metadata to include in the audit log	In addition to default fields that are always included in the audit log, additional email metadata fields may be added to the audit log by selecting a field in the list and clicking the "->" button. To remove a field from the Selected Fields list, select the field and click the "<-" button.

6.1.7   Duplicate Management

The Duplicate Management section may be used to enable email duplicate detection. Duplicate detection is based on the email metadata specified in the screen. Duplicate detection is only available for an email and not the email attachments.

Field/Section	Description
Enable duplicate management	If selected, duplicate management will be enabled for the email connector.
Use default system database for duplicate detection	If selected, the current Email Manager database will be used to track duplicate items.
Use another database for duplicate detection	If selected, the database of another instance of Email Manager will be used to track duplicate items. The alternate duplicate database must belong to another Email Manager instance. To select the alternate database, click the "…" button. This feature requires at least two different instances of Email Manager, each with its own database configured according to the instructions in the Setup Guide.
Duplicate database purge interval	The number of days that data for captured items should be retained in the database. The default setting is "0", which will cause the system to never purge records from the database.
Metadata to use for duplicate detection	A list of email metadata that will be used to identify duplicates. Additional email metadata fields may be added to the Selected Fields by selecting a field in the list and clicking the "->" button. To remove a field from the Selected Fields list, select the field and click the "<-" button.

6.1.8   Group Rules

The Group Rules section may be used to define the LDAP server Email Manager should use when applying Rules that utilize the Group To/From/CC/BCC email properties. For each user that appears in an email's recipient fields (and is a user on the email server being used), a query will be performed on the LDAP server to determine what groups each user belongs to. The results of the query will then be compared against the group name entered in the rules clause to determine whether the rule clause is true. If the directory used by the email server is different than the LDAP directory, the user id of the user on the email server must match the user id of the user on the LDAP server.

Note that enabling Group Rules will affect system performance.

Field/Section	Description
Enable Group Rules	If selected, LDAP group look ups will be enabled. This option should only be enabled if Rules that utilize the Group To/From/CC/BCC email properties are being used. System performance will be affected

	if Group Rules are enabled.
Select LDAP Server Type	The type of LDAP server to connect to. The following are valid selections: • Active Directory: When connecting to an ActiveDirectory LDAP server • eDirectory: When connecting to an eDirectory or Lotus Notes eDirectory LDAP server • SunOne: when connecting to a SunOne LDAP server
LDAP Server Host Name	The "host" that is running the LDAP server. May be one of the following • Domain name • Name of the server • IP address of the server
Port	TCP port number to which to connect. Default LDAP port is 389
Protocol Version	Protocol version the LDAP server is running. Valid entries are 2 and 3.
Base DN	The node in the directory tree that Email Manager will start its search. The search will search all sub trees of the base DN. Most of the LDAP servers require a Base DN to be set when performing queries. Click the "…" button to select a value.
User Distinguished Name	The Distinguished Name of the user Email Manager should use to authenticate against the directory. If the LDAP server allows Anonymous Binding the User Distinguished Name field may be left blank. The following are examples of Distinguished Names for different LDAP servers. Active Directory: • Domain\Username (i.e. MyDomian\Administrator) • CN=Username,CN=Users,DC=Domain,DC=DomainExtention (i.e. CN=Administrator,CN=Users,DC=MyDomain,DC=com) eDirectory: • cn=Username,o=Organization (i.e. cn=Admin,o=MyOrg) SunOne: • cn=Username (i.e. cn=Directory Manager)
Password	The password for User Distinguished Name.

Test LDAP Settings	Click this button to verify whether the LDAP settings specified are correct.

6.1.9   Group Rule Query Options

The query that Email Manager will use to look up groups on the LDAP server may be customized by using the Group Rules Query Options screen. The query should only be updated on an exception basis as any changes to the options on this screen may result in failure of the group query or degraded system performance.

Field/Section	Description
Enable Group Rules	If selected, LDAP group look ups will be enabled. This option should only be enabled if Rules that utilize the Group To/From/CC/BCC email properties are being used. System performance will be affected if Group Rules are enabled.
User Query	The LDAP filter string used to match the email property (Email (To), Email (From), etc…) to a specified LDAP user entry. The '<%objectId%>' token will be replaced by the value of the email property. For example if the 'Email (To)' field contains the value 'scotth', the User Query '(sAMAccountName=<%objectId%>)' will be converted to '(sAMAccountName=scotth)'.
Direct Attribute	Defines which attribute of an LDAP entry is used by the Email Manager to indicate group memberships directly (see Direct vs. Indirect Queries below). If an entry does not have this attribute available, an Indirect Query will be performed. For example, an Active Directory entry possesses a "memberOf" attribute indicating that the entry is a member of a particular group. A SunOne LDAP entry has no such attribute.
Indirect Query	Used when a Direct Attribute is not stored with the LDAP entry itself and a query is required to retrieve the group membership information. For example in a SunOne system, the user entry 'cn=Admin' does not contain group membership data so the Indirect Query "(uniqueMember=<%objectId%>)" or "(uniqueMember=cn=Admin)"would need to be performed to retrieve all the groups to which the user Admin belongs.
Group Attribute	Defines which attribute of the group is to be returned to Email Manager rules for evaluation.
Recursively retrieve all groups	Indicates that the Email Manager will recursively retrieve all nested groups to which a user belongs. For example, if user1 is a member of Group1 and Group1 is a member of Group2, a recursive lookup would return both Group1 and Group2. A non-recursive lookup would only return Group1. Note: in some cases performance may be severely impacted by selecting recursion.

Direct vs. Indirect Queries

For the LDAP servers supported by Email Manager, two types of LDAP entries are utilized based on the type of group information they may or may not contain:

1. Direct Group Information: the entry contains an attribute containing which group or groups it is a "Member Of".

2. Indirect Group Information: the entry does not contain any group membership information. The group membership is determined by querying for what groups this entry as a "Member"

The following examples illustrate the difference between Direct and Indirect queries:

- ActiveDirectory (Direct Group Information):

  The 'Administrator' entry contains an attribute named 'memberOf' which has several values associated with it. This attribute is defined by the user as the "Direct Attribute" in the Configuration Manager. Each 'memberOf' value specifies the DN of the group that the user 'Administrator' is a 'Member Of'. In this case the user entry contains the information to directly retrieve the group information.

  Since the user entry contains the group membership information directly in its LDAP entry, a query does not need to be performed to retrieve the user's group membership information. Note that the group information stored in the "memberOf' attribute is the distinguished name of the group. To retrieve the actual group entry (to allow its attributes to be accessed), a query will need to be performed to retrieve the group entry. This query is known as the "direct query" and will use the value of the "Direct Attribute" (in this case 'memberOf') and use it to retrieve the group entry. For example, the 'Administrator' user has the value of 'CN=Administrators,CN=Builtin,DC=mydomian,DC=com' as a 'memberOf'attribute. Using the "Direct Query" '(distinguishedName=<%objectId%>)' generates the filter '(distinguishedName= CN=Administrators,CN=Builtin,DC=mydomain,DC=com)' which will retrieve the LDAP group entry so all of the group's attributes can be utilized by Email Manager Rules..

- SunOne (Indirect Group Information):

  The user 'User1' is a member of groups "Group1.1.1" and "Group2.2.1" but no direct information about these group memberships are stored with the user entry.

  To retrieve the group membership information, an "indirect query" must be performed by matching the user's distinguished name (generated from the users CN in this case) to a group's "Member" attribute. The group "Group 2.2.1" has the attribute 'uniqueMember' which indicates that "User1" is a member of this group. Because the user entry does not contain any group membership information directly, the indirect query "(uniqueMember=<%objectId%>)" is used to retrieve all the groups in which 'User1' is a member. This query can be done recursively to retrieve the entire list of groups to which the user belongs.

6.2 Email Server

The Email Server screen is used to define the name of the Email Server that Email Manager should connect to.

To add an email server that Email Manager will connect to, select the node for the email server connector below the "Source Servers and Profiles" node, and either click the "New Source Server" button in the content pane, right click and select "New Source Server", or from the file menu choose Edit -> New Source Server...

To edit an email server that has already been defined, select the node for the email server, and either click the "Edit" button in the content pane, right click and select "Edit", or from the file menu choose Edit -> Edit...

To edit an email server that has already been defined, select the node for the email server, and either click the "Edit" button in the content pane, right click and select "Edit", or from the file menu choose Edit -> Edit...

To delete an email server that has already been defined, select the node for the email server, and either click the "Delete" button in the content pane, right click and select "Delete", or from the file menu choose Edit -> Delete...

If running in Exchange Server mode, the following fields are available on the screen:

Field/Section	Description
Exchange Server Name	The name of the Exchange Server.
Public Folder for Client	The name of the public folder that will be used by the Email Manager Client to temporarily store email. If the public folder is a subfolder of another folder, use a "/" to separate the folder names. It is assumed the public folder is created under the folders `Public Folders/All Public Folders`, and therefore the `Public Folders/All Public Folders` should not be included in the path.
	i.e. If the client public folder is created in the location:
	`Public Folders/All Public Folders/eMgr/Client`
	in the field enter: `eMgr/Client`

If running in Lotus Domino mode, the following fields are available on the screen:

Field/Section	Description
Domino Server Name	The name of the Domino server.
Database for Client	The database that will be used by the Email Manager Client to temporarily store email. The database must be created on the server and may optionally use the Email Manager Client database template contained in the installation package. The database name must be a path to the database, relative to the root folder of the Domino server.
	i.e. if the database is stored in:

	C:\Lotus\Domino\Data\eMgr\eMgrclient.nsf
	in the field enter `eMgr\eMgrclient.nsf`
	To ensure the Email Manager Client is able to find the Client Database location, the Domino Server Name configured must match the server name configured in the Notes INI file on the end user desktops the Email Manager Client is installed on. It is assumed that the Client Database is on the same server as the server specified in the Notes INI file.
	Optionally, registry keys may be set on end user machines to specify the Domino Server name and client database location that should be used by the Email Manager Client.

If running in GroupWise mode, the following fields are available on the screen:

Field/Section	Description
Domain	The GroupWise domain that Email Manager should connect to.
Domain Directory	The network share used for the GroupWise Domain Directory. Note that the Windows user currently being used to run the Configuration Manager and/or the Novell user currently connected to the eDirectory must have read/write access to the Domain Directory. It is suggested the connection to the Domain Directory be validated prior to configuring Email Manager (by entering the share name in Windows Explorer for instance).
Client Account	The GroupWise Account that will be used by the Email Manager Client to temporarily store references to email that a user has selected for capture. The account must be located within the Domain specified.
Username	The fully qualified eDirectory username of the user that should be used to connect to the eDirectory used by the GroupWise server. The user name must be entered in the format:

username.organization.organziational_unit.tree |
Password	The password for Username.
Trusted Application Name	The name to assign Email Manager in the GroupWise Trusted Application list. The name should only be changed if the default name specified is already being used in GroupWise.
Trusted Application Key	The Trusted Application key generated by GroupWise for Email Manager to utilize when the Generate Key button is clicked. This field is display only.
Generate Key	Clicking this button will create a new Trusted Application entry in GroupWise and will display the generated key value in the Trusted Application Key field.

6.3   Profiles

Profiles define what locations on the email server Email Manager should monitor, what rules to apply to items in the location and what index template to use if a particular rule applies. In addition, processing and scheduling options may be configured. Prior to creating a Profile, all Index Templates and Rules required should be pre-created.

To add a new Profile, select the Profile node in the tree below the email server and either click the "New Profile" button in the content pane, right click and select "New Profile…", or from the file menu choose Edit -> New Profile…

To edit an existing Profile, select the Profile in the tree and either click the "Edit" button in the content pane, right click on the Profile node and select "Edit…", or from the file menu choose Edit -> Edit…

To copy an existing Profile, select the Profile and either click the "Copy" button in the content pane, right click on the Profile node and select "Copy…", or from the file menu choose Edit -> Copy…

To delete an existing Profile, select the Profile and either click the "Delete" button in the content pane, right click on the Profile node and select "Delete…", or from the file menu choose Edit -> Delete.

If Edit or New are selected, the Profile screen is shown, which allows a Profile to be configured. The Profile screen may be used to create or edit a Profile. A Profile includes the sections General Settings, Monitored Locations, Rules/Index Templates, Processing Options and Scheduling Options.

6.3.1   General Settings

Field/Section	Description
Profile Name	The name of the Profile. Give the profile a descriptive name that indicates what the Profile is for. The Profile Name is a mandatory field.
Active	If selected, the Profile will be used by the system. If this flag is not selected, the Profile will be disabled.
Profile Type	Specifies the type of the Profile. Profile types include: • Client Profile: the profile is for Email Manager Client use • Scheduled Profile: the profile operates in scheduled mode. When the Profile runs is based on setting in the Scheduling Options section of the Profile. • Active Profile: the profile operates in monitoring mode. The Profile will run continuously.
Enable timestamp optimization	This option is only available for Lotus Connector profiles. If selected, this option is used by the Lotus Connector to improve performance when processing all of the documents in a specific database. When enabled, the Lotus Connector keeps track of the database's 'LastModified' timestamp and uses this to limit processing to databases and documents that have changed since the last pass. However, this technique is not applicable to folder monitoring, as adding a document to a

	folder does not update the document or database timestamp. In addition, if items are not processed initially due to error conditions, the items will not be re-processed on a subsequent run as the timestamp on the items will not have changed. This could potentially cause items to be skipped when processing the database
Capture Email	If selected, the profile will add email files to the document repository.
MSG/DXL File	If selected, email files will be created in MSG file format for Exchange email or DXL file format for Lotus Domino email. DXL file functionality is only available if Lotus Notes client 6.0.2 or higher is used on the Email Manager Server. End users may be using older versions or the Notes client, but will not be able to import DXL files into the Notes client unless 6.0.2 or higher is being used.
Email XML Representation	If selected, GroupWise email files added to the document repository will be created as an XML file. Note that this is not a native file format supported by GroupWise but a custom format used by Email Manager. The XML file will contain an HTML representation of the email body, which will retain much of the email's formatting. As well, the XML file will contain a snapshot of the email's properties.
Plain Text	If selected, email files will be created in plain text format.
File Extension	The file extension to use for plain text email files.
Capture attachments as individual files	If selected, attachments will be added as separate files to the document repository.
Check for duplicates	Is selected, duplicate checking will be enabled for the profile. This option will only be available if duplicate detection is enabled in the Email Connector configuration screen.
Do not capture duplicated and do not apply processing options	If selected, duplicates will not be captured and processing options will not be applied.
Do not capture duplicated but apply processing options	If selected, duplicates will not be captured, but processing options defined in the profile may be applied.
Capture Duplicates	If selected, duplicates will be identified and logged but will still be captured.

6.3.2   Monitored Locations

The Monitored Locations section shows what locations on an email server will be monitored for email.

Field/Section	Description
Email Server	The email server that the Profile will connect to.
Ignore items already processed by current profile	If selected, items that have already been processed by the current profile will not be processed again the profile.
Ignore items already processed by other profiles	If selected, items that have already been processed by any profile will not be processed again the profile.
Ignore items already captured	If selected, items that have already been captured will not be processed again by the profile. For this option to function, in the processing options for Capture Items, the flag "Mark email in captured location as captured" must be selected.
Ignore items where access is denied	If selected, items that cannot be accessed will be ignored. An error will not be logged for these items. This option is not available for GroupWise.
Monitor all mailboxes	If selected, all mailboxes on the selected email server will be monitored. This option is only available for Scheduled Profiles.
Monitored Locations	A list of locations on the email server that Email Manager should monitor. To add a new location, click the "Add" button. To edit an existing location, click the "Edit" button. To remove a location, click the "Delete" button. Selecting Add or Edit will open the Edit Monitored Location screen.
Monitored Sub-Locations	A list of sub-locations of the Monitored Locations entered to either include or exclude from monitoring. The list applies to all Monitored Locations entered that have the Monitor Sub Locations option selected. This section is only available for Scheduled Profiles. For a list of common locations in a Lotus Notes mailbox that may be monitored, see APPENDIX B: LOTUS NOTES VIEW NAMES. If locations to include are entered, only those locations in the list will be monitored. If locations to exclude are entered, all locations except those entered in the list will be included for monitored. To add a new location, click the "Add" button. To edit an existing location, click the "Edit" button. To remove a location, click the "Delete" button. Selecting Add or Edit will open the Edit Sub Location screen.

6.3.2.1　Edit Monitored Location

The Edit Monitored Location screen may be used to add or edit a monitor location.

Field/Section	Description
Location	The location to monitor.
	For Exchange the location may be:
	• Public Folder: the name of the public folder to monitor. If the public folder is a subfolder of another folder, use a "/" to separate the folder names. It is assumed the public folder is created under the folders `Public Folders\All Public Folders`, and therefore the `Public Folders\All Public Folders` should not be included in the path.
	i.e. If the client public folder is created in the location:
	`Public Folders/All Public Folders/eMgr/Cap`
	in the field enter: `eMgr/Cap`
	• Mailbox: the name of the mailbox to monitor. To monitor a specific location in mailbox, include the location name. i.e. if the Inbox in the mailbox Capture needs to be monitored, the value entered should be: Capture\Inbox. Note that if a location in the mailbox is not specified, if the Monitor Sub Locations option is selected, all locations in the mailbox will be monitored. If Monitored Sub Locations option is not selected, no locations in the mailbox will be monitored.
	For Lotus Domino the location may be:
	• Mailbox: the name of the mailbox to monitor.
	• Lotus Database: the name of the database to monitor.
	• Lotus Template: all databases based on the template name will be monitored.
	For GroupWise, the location may be:
	• Account: the name of the Account to monitor.
	• Post Office: the name of the Post Office to monitor. All accounts in the post office will be monitored. Any sub-folder settings will apply to each individual account.
Monitored Location Type	For Exchange, the following location types are supported:
	• Public Folder
	• Mailbox
	For Lotus Domino, the following location types are supported:
	• Mailbox
	• Lotus Database
	• Lotus Template

Monitor Sub Locations	If selected, sub locations of the Location specified will also be monitored. Otherwise, only the "root" of the location will be monitored. For Exchange, the "root" is empty, so either the Location name should contain a subfolder name or monitor sub-locations should be enabled. For Lotus Notes, the "root" contains all the email in the mailbox. For Groupwise, the "root" contains all the email in the mailbox.
Folder Depth	If sub locations are being monitored, the folder depth specifies how many levels of sub locations Email Manager should monitor.

6.3.2.2   Edit Monitored Sub-Location

The Edit Monitored Sub-Location screen may be used to add or edit sub-locations of monitored locations (i.e. folders in a mailbox that has been specified or sub-folders of a public folder).

Field/Section	Description
Location	The location to monitor. For Exchange the location may be: • Folder: the name of a folder. Use a "/" to separate the folder names. For Lotus Domino the location may be: • Folder/View: the name of a folder or view a database. See APPENDIX B: LOTUS NOTES VIEW NAMES for a summary of common Lotus view names. • Select Condition: a Lotus Notes database query that may be used to identify a sub-set of items in a database based on properties of items. Consult Lotus Notes documentation for details on forming select conditions. The following are some examples of select conditions. Example of Select Condition to monitor "Sent" folder: SELECT DeliveredDate = "" & PostedDate != "" & !(@IsMember("S"; ExcludeFromView)) Example of Select Condition to monitor "Emails with Attachments" only: SELECT @Attachments See APPENDIX C: Lotus Select Condition Examples for additional examples. For GroupWise, the location may be: • Folder: the name of a folder in an Account. Use "/" to separate the folder names.

Monitored Location Type	For Exchange, the following location type is supported:
	• Folder
	For Lotus Domino, the following location types are supported:
	• Folder/View
	• Select Condition
Monitor Sub Locations	If selected, sub locations of the Location specified will also be monitored. Otherwise, only the "root" of the location will be me monitored.
Folder Depth	If sub locations are being monitored, the folder depth specifies how many levels of sub locations Email Manager should monitor.

6.3.3 Rules/Index Templates

The Rules/Index Templates screen may be used to specify what rules should be applied to email in the Monitored Locations and, if a rule applies, what Index Template should be used to add the email to the document repository.

Field/Section	Description
Rule/Index Template Mappings	This section contains a list of rules that should be applied to the Monitored Locations and what Index Template should be used to capture an email if a specific rule applies. To add a new mapping, click the "Add" button. To edit an existing mapping, click the "Edit" button. To remove a mapping, click the "Delete" button. To change the order in which the rules are applied, select a mapping and click the "Move Up" or "Move Down" buttons.
Do not capture email	If selected, if none of the rules apply, the email will not be captured.
Capture email using this template	If selected, if none of the rules apply, the email will be captured using the index template selected.

6.3.4 Processing Options

For Active and Scheduled Profiles, processing options available are identical to the processing options available in the Email Connector Configuration Options. Each profile, by default, will use the Default Settings for processing options defined in the Email Connector Configuration Options. The processing options may be overridden by selecting the "Override System Defaults" option.

For Client Profiles, only the Shortcut Options are available and will automatically override the system defaults. All other processing options will be based on the processing options defined in the Default Settings in the Configuration Options.

6.3.5   File Retention

The File Retention section is used to specify whether temporary files created while processing items should be retained.

Field/Section	Description
Enable File Retention	If selected, file retention will enabled.
Retention folder	The folder retained files to.
Days to retain files	The number of days files will be kept before they are deleted.

6.3.6   Scheduling Options

Scheduling Options are only available for Scheduled Profiles. By default, the Scheduling Options defined in the Email Connector Configuration Options will be used. The Scheduling Options may be overridden by selecting the "Override System Defaults" option.

6.4   PST Connector Configuration

The PST Connector configuration screen is used to specify general configuration settings for the PST Connector. The PST Connector is used to find PST archive files and capture the content of the archive.

To update configuration options of the PST Connector, select the PST Connector node below the "Source Servers and Profiles" node, and either click the "Edit" button in the content pane, right click and select "Edit", or from the file menu choose Edit -> Edit...

6.4.1   General Settings

The General Settings section contains the following fields:

Field/Section	Description
Attachment Name Prefix	The prefix that will be used for attachment names and files.
Resolve addresses in distribution lists	If selected, for distribution lists specified in an email recipient list (to/from/cc fields), the members of the distribution list will be resolved and added to the recipient metadata. If this option is not selected, the distribution list will not be resolved and the name of list will appear in the recipient metadata.
Save Email in Unicode Format (Outlook 2003 only)	If selected, email will be saved in Unicode format. This option is only available for Exchange Server with Outlook 2003. Note that any email saved in Unicode format will not be readable in older versions of Outlook (Outlook 2000 and Outlook 2002).
Email Shortcut Text	The descriptive text that will be added to an email on the email server when a shortcut is created to a captured email.
Attachment Shortcut Text	The descriptive text that will be added to an email on the email server when a shortcut is created to a captured attachment.
Blank Subject Line Text	When an email is captured, the text that will be used for the

	email subject line if the subject line is blank.

6.4.2   PST Content Processing Options/Captured Items

The PST Content Processing Options for Captured Items section is used to configure settings that apply to an email in a PST archive if the email is selected for capture. The settings only apply to the email in the PST archive or email server and not the email file that is added to the repository.

Note that processing options may be overridden in each profile.

Deletion Options

Field/Section	Description
Delete email from capture location	If selected, the email will be deleted from the PST Archive in the location that the Email Connector found the email.
Delete email from mailboxes of all recipients	If selected, the email will be deleted from the mailboxes of all users the email was sent to. If this option is selected, the rest of the processing options will not be applied.
Leave email in capture location	If selected, the email will not be deleted from the location the PST Connector found the email.

Notification Options

Field/Section	Description
Change icon in capture location	If selected, the icon will be changed for the email in the PST Archive in the location that the Email Connector found the email. For Exchange Server, an organizational form must be deployed to support the icon change in user mailboxes.
Change icon in mailboxes of all recipients	If selected, the icon will be changed for the email in the mailboxes of all users the email was sent to.
Mark email in capture location as captured	If selected, the email in the PST Archive in the location that the PST Connector found the email will be marked as "captured". The "Item Already Captured" option in rules as well as the "Ignore Items Already Captured" flag in a Profile may be used to determine whether an email should be captured again.
Mark email in mailboxes of all recipients as captured	If selected, the email will be marked as "captured" in the mailboxes of all users the email was sent to

Attachment Options

Field/Section	Description
Remove attachments from email in capture location	If selected, attachments will be removed from the email in the PST Archive in the location that the PST Connector found the

	email.
Remove attachments from email in mailboxes of all recipients	If selected, attachments will be removed from the email in the mailboxes of all users the email was sent to.

Shortcut Options

Field/Section	Description
Enable shortcuts for email in capture location	If selected, shortcut options will be enabled for email PST Archive in the location that the Email Connector found the email. The shortcut consists of a URL link to a document in the document repository.
Enable shortcuts for email in mailboxes of all recipients	If selected, shortcut options will be enabled for email in the mailboxes of all users the email was sent to.
Shortcut location in email	Specifies where, relative to the email body, the shortcut should be placed. Valid options are: • After Body • Before Body
Add shortcut to captured email in document repository	If selected, a shortcut to the copy of the email in the document repository will be created in the email on the email server.
Leave Email Body	If selected, the email body will be left intact when adding shortcuts.
Remove Email Body	If selected, the email body will be removed completely when adding shortcuts.
Number of characters in body to leave	If selected, the number of characters specified will be left in the email body when adding shortcuts. Note that if this option is selected, the email format for the remaining text will be changed to plain text.

PST Owner Mailbox Options

The options in this section apply only to the owner of the PST archive. The PST Connector identifies the owner of the PST archive based on the NTFS "Owner" file attribute or the owner of the Outlook profile being used (provided the option "Monitor Outlook Profiles" is selected in a Monitored Location in a PST Profile). Due to variations in Windows configuration, when using the NTFS "Owner" property the property may not accurately reflect the user who created the file,

Field/Section	Description
Create Shortcut in folder	If selected, the location in the PST Archive Owner's mailbox that an email with a shortcut will be created.

Create sub-folder based on PST Archive Name	If selected, shortcuts will be placed in a sub-folder in the PST archive owner's mailbox named after the PST archive. The sub-folder will be created below the folder specified in "Create Shortcut in folder".
Replicate PST archive folder structure	If selected, the shortcut will be placed in a folder based on the folder in the PST archive the shortcut originated from. The folder will be created below the folder specified in "Create Shortcut in folder".

6.4.3   Processing Options/Items Not Captured

The Processing Options for Items Not Captured section is used to configure settings that apply to an email if the email is not selected for capture.

Field/Section	Description
Delete email in monitored location	If selected, the email will be deleted from the email server in the location that the Email Connector found the email.
Delete email from mailboxes of all recipients	If selected, the email will be deleted from the mailboxes of all users the email was sent to.
Leave email in capture location	If selected, the email will not be deleted from the location the Email Connector found the email.

6.4.4   Scheduling Options

Scheduling options are used to specify when a should run.

Field/Section	Description
This profile should run	Specifies type of schedule. Based on the type of schedule selected, different options will appear on the screen. Values that may be selected include: • Always: the scheduled profile will run continuously. • Once: the scheduled profile will run only once. • Daily: the scheduled profile will run on a daily basis at a specific time. • Interval: the scheduled profile will run at a specific time interval. • Weekly: the scheduled profile will run on a weekly basis at a specific time. • Monthly: the scheduled profile will run on a monthly basis at a specific time.

Run "Once" Options

Field/Section	Description
Run On	Select the date the profile should run. By default, the date is set to today's date.
Run Period	The time the profile should start running and how long the task should run for.

Run "Daily" Options

Field/Section	Description
Run Period	The time the profile should start running and how long the task should run for.

Run at "Interval" Options

Field/Section	Description
Schedule Interval	Number of seconds/minutes/hours/days between each run of the profile.

Run "Weekly" Options

Field/Section	Description
Schedule Weekly	The days of the week the profile should run.
Run Period	The time the profile should start running and how long the task should run for.

Run "Monthly" Options

Field/Section	Description
Schedule Monthly	The days of the month the profile should run.
Run Period	The time the profile should start running and how long the task should run for.

6.4.5   Audit Log Settings

The Audit Log Settings section may be used to configure system audit logs. The audit log will contain one row for each item the system attempts to capture and will indicate whether the item was successfully captured.

Field/Section	Description
Enable audit logging	If selected, audit logging will be enabled.
Folder to save audit logs to	The folder on the file system that audit logs will be created in.
Create new audit log for each profile	If selected, an audit log file will be created for each profile.
Maximum file size (kilobytes)	The maximum size that an audit log file should grow to before a new file is created.
Metadata to include in the audit log	In addition to default fields that are always included in the audit log, additional metadata fields may be added to the audit log by selecting a field in the list and clicking the "->" button. To remove a field from the Selected Fields list, select the field and click the "<-" button.

6.4.6   Duplicate Management

The Duplicate Management section may be used to enable email duplicate detection. Duplicate detection is based on the email metadata specified in the screen. Duplicate detection is only available for an email and not the email attachments.

Field/Section	Description
Enable duplicate management	If selected, duplicate management will be enabled for the PST Connector.
Use default system database for duplicate detection	If selected, the current Email Manager database will be used to track duplicate items.
Use another database for duplicate detection	If selected, the database of another instance of Email Manager will be used to track duplicate items. The alternate duplicate database must belong to another Email Manager instance. To select the alternate database, click the "…" button.
Duplicate database purge interval	The number of days that data for captured items should be retained in the database. The default setting is "0", which will cause the system to never purge records from the database.
Metadata to use for duplicate detection	A list of email metadata that will be used to identify duplicates. Additional email metadata fields may be added to the Selected Fields by selecting a field in the list and clicking the "->" button. To remove a field from the Selected Fields list, select the field and click the "<-" button.

6.5   PST Connector Profile

PST Profiles define what locations on the file system or network to look for PST archives and what emails in a PST archive should be captured. In addition, processing and scheduling options may be configured. Prior to creating a Profile, all Index Templates and Rules required should be pre-created. For Index

Templates and Rules that will be used in a PST Profile, the Metadata Type must be set to either PST Archive File or PST Email.

To add a new Profile, select Profile node in the tree below PST Source Connector and either click the "New Profile" button in the content pane, right click and select "New Profile…", or from the file menu choose Edit -> New Profile…

To edit an existing Profile, select the Profile in the tree and either click the "Edit" button in the content pane, right click on the Profile node and select "Edit…", or from the file menu choose Edit -> Edit…

To copy an existing Profile, select the Profile and either click the "Copy" button in the content pane, right click on the Profile node and select "Copy…", or from the file menu choose Edit -> Copy…

To delete an existing Profile, select the Profile and either click the "Delete" button in the content pane, right click on the Profile node and select "Delete…", or from the file menu choose Edit -> Delete.

If Edit or New are selected, the Profile screen is shown, which allows a Profile to be configured. The Profile screen may be used to create or edit a Profile. A Profile includes the sections General Settings, Monitored Locations, Rules/Index Templates, Processing Options and Scheduling Options.

6.5.1   General Settings

Field/Section	Description
Profile Name	The name of the Profile. Give the profile a descriptive name that indicates what the Profile is for. The Profile Name is a mandatory field.
Active	If selected, the Profile will be used by the system. If this flag is not selected, the Profile will be disabled.
Run in Preview Mode	If selected, when the Profile executes, a preview will be created of what PST archive files will be processed by Profile. No email will be captured and no processing options will be applied. To ensure the preview only runs once, the Scheduling Options in the Profile may need to be updated. To do this, click on "Scheduling Options" in the navigation pane of the Profile, enable the checkbox "Override System Defaults", and in the "This profile should run" drop down list, select "Once". In the "Run Period" section, specify the time that the preview should run. In addition, in the PST Connector Configuration Options, Audit Logging should be enabled. The audit log created will indicated what PST archive files the PST Connector has found.
Capture Email	If selected, the profile will add email files to the document repository.
MSG/DXL File	If selected, email files will be created in MSG file format for Exchange email or DXML file format for Lotus Domino email.
Plain Text	If selected, email files will be created in plain text format.

File Extension	The file extension to use for plain text email files.
Capture attachments as individual files	If selected, attachments will be added as separate files to the document repository.
Connect to Exchange Server	The name of the Exchange Server that the PST Connector should connect to do the following tasks: • Look up extended address book data • Change the icon for captured items that are also in the mailbox of a user on the email server • Create shortcuts for captured items that are also in the mailbox of a user on the email server • Remove attachments for captured items that are also in the mailbox of a user on the email server Specifying the Exchange Server name is optional. If an Exchange Server name is not specified, the tasks indicated above will not be done.
Check for duplicates	If selected, duplicate checking will be enabled for the profile. This option will only be available if duplicate detection is enabled in the PST Connector configuration screen. Note that duplicate detection will only occur for email in a PST archive file and not the PST archive file itself.
Do not capture duplicated and do not apply processing options	If selected, duplicates will not be captured and processing options will not be applied.
Do not capture duplicated but apply processing options	If selected, duplicates will not be captured, but processing options defined in the profile may be applied.
Capture Duplicates	If selected, duplicates will be identified and logged but will still be captured.

6.5.2   Monitored Locations

The Monitored Locations section shows what locations on the file system or network will be searched for PST files.

Field/Section	Description
Ignore PST Archives already processed	If selected, PST archive files that have already been processed by the current profile will not be processed again by the profile. For this option to function, in the PST Archive Processing Options for Capture Items, the flag "Mark file as processed" must be selected.
Ignore items in PST Archive already processed by other profiles	If selected, items inside a PST archive file that have already been processed will not be processed again by the profile. For

	this option to function, in the PST Content Processing Options for Capture Items, the flag "Mark email in capture location as captured" must be selected.
Monitored Locations	A list of locations on the file system or network that will be searched for PST files
	To add a new location, click the "Add" button. To edit an existing location, click the "Edit" button. To remove a location, click the "Delete" button.
	Selecting Add or Edit will open the Edit Monitored Location screen.

6.5.2.1   Edit Monitored Location

The Edit Monitored Location screen may be used to add or edit a monitor location.

Field/Section	Description
Location Path	The location that should be monitored for PST archive files. The type of location is dependent on the Monitored Location Type selected.
	If the Monitored Location type is File System, a UNC path may be entered or selected.
	If Monitored Location type is Computer, the name of a computer on the network, may be entered. i.e. MyDomain\Computer1
	If Monitored Location type is Computer Group, the name of a computer group on the network, may be entered. MyDomain\ComputerGroup1
Monitored Location Type	The type of location to monitor for PST archive files. Location types include:
	• File System: a location on the local disk or network
	• Computer: a computer in the network.
	• Computer Group: a group of computers on the network
	If Computer or Computer Group are selected, the Monitored Location Options section will be enabled
Monitored Location Options	Options for monitoring a computer or computer group.
Monitor Sub Locations	If selected, sub locations of the Location specified will also be monitored. Otherwise, only the "root" of the location will be monitored.
Folder Depth	If sub locations are being monitored, the folder depth specifies how many levels of sub locations Email Manager should

	monitor.

Monitored Location Options

Field/Section	Description
Monitor all user created shares	If selected, all shares on a computer created by a user (non-default shares) will be monitored.
Monitor all default shares	If selected, all default shares on a computer will be monitored. i.e. C$, D$
Monitor Outlook Profiles	If selected, the PST Connector will search for all Outlook Profiles on a computer and process all PST archives associated with each Outlook Profile.
Disable PST File Creation	If selected, PST file creation will be disabled on the computer. In order to do this action, the expected location(s) on the computer of the MAPI configuration file (MAPISVC.INF), which specified what services are available for use in Outlook, must be specified. The following is the default location for the configuration file: C:\Program Files\Common Files\System\Mapi\1033 If the location is different that the default, i.e. "C:\Program Files\Common Files\System\MSMapi\1033", add the location by clicking the "Add MAPI Configuration File Location" button.

6.5.3   Rules/Index Templates

The Rules/Index Templates screens may be used to specify rules that will determine what PST archive files to process as well as what rules should be applied to email in a PST archive file and, if a rule applies, what Index Template should be used to add the email to the document repository.

PST Archive File Rules

Field/Section	Description
Rule	This section contains a list of rules that should be applied to PST archive files in the Monitored Locations to determine whether a PST archive should be processed. To add a new rule, click the "Add" button. To edit an existing rule, click the "Edit" button. To remove a rule, click the "Delete" button. To change the order in which the rules are applied, select a rule and click the "Move Up" or "Move Down" buttons.
Do not process PST file	If selected, if none of the rules apply, the PST archive file will not be processed.

Process PST file	If selected, if none of the rules apply, the PST archive file will be processed

PST Content Rule/Template Mappings

Field/Section	Description
Rule/Index Template Mappings	This section contains a list of rules that should be applied to email in a PST archive file and what Index Template should be used to capture an email if a specific rule applies. To add a new mapping, click the "Add" button. To edit an existing mapping, click the "Edit" button. To remove a mapping, click the "Delete" button. To change the order in which the rules are applied, select a mapping and click the "Move Up" or "Move Down" buttons.
Do not capture email	If selected, if none of the rules apply, the email will not be captured.
Capture email using this template	If selected, if none of the rules apply, the email will be captured using the index template selected.

6.5.4   PST Archive Processing Options

Processing options available are identical to the processing options available in the PST Connector Configuration Options. Each profile, by default, will use the Default Settings for processing options defined in the PST Connector Configuration Options. The processing options may be overridden by selecting the "Override System Defaults" option.

6.5.5   PST Content Processing Options

Processing options available are identical to the processing options available in the PST Connector Configuration Options. Each profile, by default, will use the Default Settings for processing options defined in the PST Connector Configuration Options. The processing options may be overridden by selecting the "Override System Defaults" option.

6.5.6   File Retention

The File Retention section is used to specify whether temporary files created while processing items should be retained.

Field/Section	Description
Enable File Retention	If selected, file retention will enabled.
Retention folder	The folder retained files to.
Days to retain files	The number of days files will be kept before they are deleted.

6.5.7   Scheduling Options

By default, the Scheduling Options defined in the PST Connector Configuration Options will be used. The Scheduling Options may be overridden by selecting the "Override System Defaults" option.

7 CLIENT CONFIGURATION OPTIONS

The Client Configuration section lists settings for the Email Manager Client that may be configured as well as Client Profiles.

To open the Client Configuration Options screen, select the Client Configuration Options and either click "Edit" in the content pane, right click and select "Edit" or chose the menu item Edit -> Edit…

For each setting, whether the option is available in the client is specified and the default value in the client is specified (where relevant). To edit a configuration setting, click on a configuration setting and click the Edit button, or double click on the item.

The following table lists all the configuration settings available:

Configuration Setting	Client Screen	Field	Default Value?
Config Duplicates: Enable duplicate checking	Select Profile	If enabled, client side duplicate detection will be enabled. Note that duplicate detection must also be enabled in the Email Connector configuration options.	No
Config : Duplicates: Allow users to bypass duplicate check	Select Profile	If enabled, users will have the option of by passing the duplicate detection and capturing items that have been identified as duplicated. This option works in conjunction with "Config Duplicates: Enable duplicate checking"	No
Config: General: Default FileNet group to last group selected.	Select Profile	If enabled, the FileNet groups will default to the last FileNet group that was selected.	No
Config: General: Default FileNet login to last login used.	Select Profile	If enabled, the FileNet login will default to the last FileNet login that was used.	No
Config: General: Default FileNet login to NT user	Select Profile	If enabled, the FileNet login will default the current Window user.	No
Config: General: If only one library, immediately show login screen.	Select Profile	If selected, if only one repository is configured for use, the login screen will be shown immediately to allow the user to login to the repository specified..	No
Config: General: Must Select a Repository Folder	Edit Profile	Specifies whether selecting a FileNet folder is mandatory.	Yes
Config: General: Remember last setting for 'delete after add' flag.	Edit Profile	If selected, the last setting used for the 'delete after add flag' will be used the next time the screen	No

		is opened..	
Config: Security: Default Add By Group Security	Edit Profile	Default security to assign to the user who is adding email to FileNet.	Yes
Config: Security: Default Add By User Security	Edit Profile	Default security to assign to the default group of the user who is adding email to FileNet. This option is not available for use when using Image Services.	Yes
Config: Security: Force FileNet Access Level	Edit Profile	Specifies whether or not a default access level should be assigned to items to items that appear in the Document Security Grid. If this option is enabled, all access levels will be set to setting specified in the default value.	Yes
Config: Security: Only downgrade FileNet access levels	Edit Profile	If this option is selected, security level will in the Profile security will only be downgraded and not upgraded. The value specified in the "Config: Security: Force FileNet Access Level" option will only apply to security settings that are higher than the specified security settings.	No
Config: Security: Use DIAL	Edit Profile	Specifies whether the DIAL for the user should be merged into the security settings.	Yes
Config: Security: Use FileNet Security	Select Profile/Configure eMgr	Enabling this setting will base profile access on the FileNet user who created the profile. If this setting is not enabled, profile access will be based on the NT user.	No
Config: Shortcuts: Enable client shortcut integration	Select Profile	If enabled, for email items in a user's mailbox that contain shortcuts, the email will be automatically retrieved from the document repository and displayed when the user opens the item.	No

Config: Shortcuts: Retrieve email via Web Services	Select Profile	If the option "Config: Shortcuts: Enable client shortcut integration" is enabled, indicates whether Email Manager web services should be used to retrieve and item or whether the default repository web application (i.e. Workplace or Panagon Web Services) should be used to retrieve the item.	No
Screen: eMgr Config: Select default profile.	Select Profile/Configure eMgr	Specifies whether or not the "Select default profile" option is available.	No
Screen: Profile: Add Item To Folder	Edit Profile	Specifies whether "Add Item To" button is enabled.	No
Screen: Profile: Capture Attachments	Edit Profile	Specifies whether "Archive Attachments" checkbox is enabled	Yes
Screen: Profile: Capture Email	Edit Profile	Specifies whether the "Capture Email" option is enabled.	No
Screen: Profile: Document Security	Edit Profile	Specifies whether the "Document Security" section of the screen is enabled.	No
Screen: Profile: Edit Email Format	Edit Profile	Specifies whether the "Edit Email Format" option is enabled.	No
Screen: Profile: Edit Profile	Select Profile/Configure eMgr	Specifies whether "Edit Profile" button is enabled.	No
Screen: Profile: Edit Shortcuts	Edit Profile	Specifies whether the "Edit Shortcuts" option is enabled.	No
Screen: Profile: Enable Shortcuts	Edit Profile	Specifies whether the "Enable Shortcuts" option is enabled.	No
Screen: Profile: Expand Security Area	Edit Profile	Specifies whether the "Security" section of screen is shown by default.	Yes
Screen: Profile: Index Email	Edit Profile	Specifies whether "Index" checkbox is enabled.	Yes
Screen: Profile: Profile Access Security	Edit Profile	Specifies whether the "Profile Access Security" section is enabled.	No

Screen: Profile: Prompt with Profile	Edit Profile	Specifies whether "Always show profile before archiving" checkbox is enabled.	Yes
Screen: Profile: Property Mapping table	Edit Profile	Specifies whether the "Property Mapping" grid is enabled.	No
Screen: Profile: Record Declaration Tab	Edit Profile	Specifies whether the Record Declaration tab is enabled.	No
Screen: Profile: RM Classifications	Edit Profile	Specifies whether the Record Declaration Classifications selection is enabled.	No
Screen: Profile: RM Object Store	Edit Profile	Specifies whether the Record Declaration Object Store selection is enabled.	No
Screen: Profile: RM Property Mapping table	Edit Profile	Specifies whether the Record Declaration Property Mappings section is enabled.	No
Screen: Profile: RM Record Class	Edit Profile	Specifies whether the Record Declaration Record Class combo box is enabled.	No
Screen: Profile: Security: Email Properties Option	Edit Profile	Specifies whether the "Assign Security to Email Property" radio button is enabled.	No
Screen: Profile: Security: Groups Option	Edit Profile	Specifies whether the "Assign Security to Group" radio button is enabled.	No
Screen: Profile: Security: Users Option	Edit Profile	Specifies whether the "Assign Security to User" radio button is enabled.	No
Screen: Profile: Select Doc Class for Profiles	Edit Profile	Specifies whether "Class" combo-box is enabled.	No
Screen: Profile: Separate Attachments	Edit Profile	Specifies whether the "Separate Attachments" checkbox is enabled.	Yes
Screen: Profile: Share Profile With Other Users	Edit Profile	Specifies whether the "Share Profile With Other Users" checkbox is enabled.	Yes
Screen: Select Profile: Copy Profile	Select Profile/Configure eMgr	Specifies whether "Duplicate Profile" button is enabled.	No

Screen: Select Profile: Create Profile	Select Profile/Configure eMgr	Specifies whether "Create Profile" button is enabled.	No
Screen: Select Profile: Delete After Add	Select Profile	Specifies whether "Delete Item after Adding" checkbox is enabled.	Yes
Screen: Select Profile: Edit/Create Profiles	Select Profile	Specifies whether the "Edit/Create Profile" option on the Select Profile screen is enabled.	No
Screen: Select Profile: Remove Profile	Select Profile/Configure eMgr	Specifies whether the "Remove Profile" button is enabled.	No

7.1 Client Profiles

Client Profiles are Profiles that are available for use for Email Manager Client users. Prior to creating a Client Profile, an Index Template must be created that is marked as "For Client Use". This Index Template must be selected within the Client Profile "Client Settings" section. In addition, in the Email Server definition, the Client Folder/Database that the Email Connector will monitor for client emails must be specified.

7.1.1 General Settings

Field/Section	Description
Profile Name	The name of the Profile. Give the profile a descriptive name that indicates what the Profile is for. The Profile Name is a mandatory field.
Capture Email	If selected, the profile will add email files to the document repository.
MSG/DXL File	If selected, email files will be created in MSG file format for Exchange email or DXML file format for Lotus Domino email.
Plain Text	If selected, email files will be created in plain text format.
File Extension	The file extension to use for plain text email files.
Capture attachments as individual files	If selected, attachments will be added as separate files to the document repository.

7.1.2 Client Settings

Field/Section	Description
Index Template	Select the index template that will be used with the Profile. Only Index Templates that are marked "For Client Use" will be displayed.

7.1.3 Client Processing Options

Attachment Options

Field/Section	Description
Remove attachments from email in capture location	If selected, attachments will be removed from the email on the email server in the location that the Email Connector found the email.
Remove attachments from email in mailboxes of all recipients	If selected, attachments will be removed from the email in the mailboxes of all users the email was sent to.

Shortcut Options

Field/Section	Description
Enable shortcuts for email in capture location	If selected, shortcut options will be enabled for email on the email server in the location that the Email Connector found the email. The shortcut consists of a URL link to a document in the document repository.
Enable shortcuts for email in mailboxes of all recipients	If selected, shortcut options will be enabled for email in the mailboxes of all users the email was sent to.
Shortcut location in email	Specifies where, relative to the email body, the shortcut should be placed. Valid options are: • After Body • Before Body
Add shortcut to captured email in document repository	If selected, a shortcut to the copy of the email in the document repository will be created in the email on the email server.
Leave Email Body	If selected, the email body will be left intact when adding shortcuts.
Remove Email Body	If selected, the email body will be removed completely when adding shortcuts.
Number of characters in body to leave	If selected, the number of characters specified will be left in the

	email body when adding shortcuts.
	Note that if this option is selected, the email format for the remaining text will be changed to plain text.

APPENDIX A: REGULAR EXPRESSION SAMPLES

The following table contains examples of common regular expression that may be utilized in Email Manager.

MATCH REGULAR EXPRESSIONS (FOR RULES AND INDEX TEMPLATES)

The following table contains examples of common regular expression that may be utilized in rules and Index Templates (when in "match mode").

Purpose	Expression	Sample Text	Sample Match
Match a string of numbers of fixed length.	\d{3}	Contract Number 12-345 AB12	345
Match a string of any characters of a specific length (i.e characters from a-z and digits from 0-9)	\w{8}	Contract Number 12-345 AB12	Contract
	\w{6}	Contract Number 12-345 AB12	Contra
Match a string of any two characters of fixed length followed by two digits	\w{2}\d{2}	Contract Number 12-345 AB12	AB12
Match a word that is of fixed length (assumes the word is followed by a space).	\w{8}\s	Contract Number 12-345 AB12	Contract
Match a string of numbers of fixed length but with specific characters in it. i.e. a contract number that is always 6 characters long with a '-' after the second number.	\d{2}-\d{3}	Contract Number 12-345 AB12	12-345
Match all characters before a specific pattern.	[^\d{2}]*	Contract Number 12-345 AB12	Contract Number
Match the last folder name in a path (without including the \ or /)	[^\\\/]*$	Folder 1\Folder 2\Folder 3\Folder 4	Folder 4
Match the first folder in the path (without including the \ or /)	[^\\\/]*	Folder 1\Folder 2\Folder 3\Folder 4	Folder 1
Match everything except the root folder in a path	\\.*	Folder 1\Folder 2\Folder 3\Folder 4	\Folder 2\Folder 3\Folder 4
Match last folder in path	(\\|\/)([[:word:]]|\s*)*$	Folder 1\Folder 2\Folder 3\Folder 4	\Folder 4

Match the second folder in path	(\\\|V)([[:word:]]|\s*)* [^\\\V]([[:word:]]|\s*)*	Folder 1\Folder 2\Folder 3\Folder 4	\Folder 2
Match the first folder in path	([[:word:]]|\s)*(\\\|V)*	Folder 1\Folder 2\Folder 3\Folder 4	Folder 1\
Match last two folders in path	((\\\|V)([[:word:]]|\s*)*){2}$	Folder 1\Folder 2\Folder 3\Folder 4	\Folder 3\Folder 4

REPLACE REGULAR EXPRESSIONS FOR INDEX TEMPLATES

The following table contains examples of common regular expression that may be utilized in Index Templates when in "replace mode"

Purpose	Expression/Replacement Value	Sample Text	Sample Result
Get folder path without drive letter	^[^\\]* $1	c:\folder 1\folder 2	\folder 1\folder 2
Get drive letter from folder path	\\.* $1	c:\folder 1\folder 2	c:
Get folder path without server name in UNC path	\\\\[^\\]* $1	\\servername\folder 1\folder 2	\folder 1\folder 2
Get server name from UNC folder path	\\\\([^\\]*).* $1	\\server_name\folder 1\folder 2	server_name
Get folder path without drive letter or server name in UNC path	^(\\\\)?[^\\]* $2	c:\folder 1\folder 2	\folder 1\folder 2
		[\\servername\folder 1\folder 2](#)	\folder 1\folder 2
Get a specific folder in a path with a drive letter or a UNC patch	For each section in a path with a drive letter in it, repeat the expression: ([^\\]*)\\? with the value: .* at the end of the expression. Use $<section number> to get the specific level required, where section one is the drive letter, section two is the first folder in the path, section three is the second folder in the path, etc. For UNC paths, the above applies, but prefix the express		

	with: \\\\		
	([^\\\\]*)\\\?.* $1	c:\one\two\three	c:
	([^\\\\]*)\\\?([^\\\\]*)\\\?.* $2	c:\one\two\three	one
	([^\\\\]*)\\\?([^\\\\]*)\\\?([^\\\\]*)\\\?.* $3	c:\one\two\three	two
	\\\\([^\\\\]*)\\\?.* $1	\\server\one\two\three	server
	\\\\([^\\\\]*)\\\?([^\\\\]*)\\\?.* $2	\\server\one\two\three	one
	\\\\([^\\\\]*)\\\?([^\\\\]*)\\\?([^\\\\]*)\\\?.* $3	\\server\one\two\three	two
Get all the folders after the first folder in a file path containing a drive letter	[^\\\\]*\\[^\\\\]*\\(.*) $1	c:\one\two\three	two\three
Get all the folders after the first folder in a file path containing a server name	\\\\[^\\\\]*\\[^\\\\]*\\(.*) $1	\\server\one\two\three	two\three
Get file name from a path	.*\\(.*) $1	c:\a\b\file.txt	file.txt
Get a path without the file name	(.*\\)(.*) $1	c:\a\b\file.txt	c:\a\b\
Parse components of a path with filename	^\\\\([^\\\\]+)(\\[^\\\\]+(\\[^\\\\]+(\\.*)))\\(.*)		
	$1	\\servername\a\b\c\d\e\file.txt	servername
	$2	\\servername\a\b\c\d\e\file.txt	\a\b\c\d\e
	$3	\\servername\a\b\c\d\e\file.txt	\b\c\d\e
	$4	\\servername\a\b\c\d\e\file.txt	\c\d\e
	$5	\\servername\a\b\c\d\e\file.txt	file.txt
Base Records Manager classification on	Assuming a Records Manager file plan structure has been duplicated on the file system, the	\\server_name\docs\YTG\	\Records Management\YTG

part of a folder patch	RM classification may be based on the folder a file is added to. If the file plan is located in the folder \\server_name\docs, the following expression may be used: \\\\server_name\\docs\\(.*)\\ \\Records Management\\$1 Set "server_name" to the server the files being capture are located on and set "docs" to the name of the folder the file plan is replicated in.		

APPENDIX B: LOTUS NOTES VIEW NAMES

The following table is contains the names of common views in a Lotus Note mailbox. In a Profile, when specifying Monitored Sub-Locations in a database or mailbox, the view names may be used.

View Name	Description
($All)	All items
($Drafts)	Drafts
($Sent)	Sent items
($Follow-Up)	Items marked for follow up
(Mail Threads)	Mail threads
($Inbox)	Inbox
($JunkMail)	JunkMail
($Trash)	Deleted items

APPENDIX C: LOTUS SELECT CONDITION EXAMPLES

The following are examples or Lotus Notes Select Conditions that may be used to select specific items from a database for processing. Select Condition may be used in place of Monitored Sub-Locations in Scheduled Profiles.

Scenario	Select Condition
Filtering by message form (e.g. Reply, Phone Message)	SELECT Form = "Reply"
Filtering by importance or other message flags	SELECT Importance = "1"
Messages that have been previously handled by a specific Client Profile	SELECT @IsAvailable(eCW$Client)
Messages that have been previously handled by a specific Profile (i.e. Profile with ID 23)	SELECT @IsAvailable(eCW$23)
Messages that have already been captured.	SELECT @IsAvailable(eCWIsCaptured)
Messages that have not been captured.	SELECT @IsUnavailable(eCWIsCaptured)
Messages from specific users (using email address)	SELECT INetFrom = "rpollard@filenet.com"
Messages from specific users (using internal Lotus Notes format)	SELECT From = "CN=Robert Pollard/O=FileNet"
Messages sent by SMTP	SELECT @IsAvailable(SMTPOriginator)
Messages with attachments	SELECT @Attachments > 0
Messages with attachments greater than a certain size (i.e. 10000 bytes)	SELECT @Sum(@AttachmentLengths) > 10000
Messages that have had attachments captured with the message.	SELECT eCWIsCaptured = "D" & eCWIsCaptured = "A"
Messages with attachments that have not been captured.	SELECT @Attachments > 0 & eCWIsCaptured != "A"
Messages greater than a certain size.	SELECT @DocLength > 20000
Messages with a blank or missing subject.	SELECT Subject = ""	@IsUnavailable(Subject)
Messages created by custom forms with certain custom properties (e.g. fulfilled order, incomplete support request).	SELECT Form = "SupportRequest" & Status != "Completed"