Setting Up Outlook on Workstation to Capture Emails

Setting up Outlook to allow email to pass directly to M-Files requires a number of steps to assure that all of the data required is sent to the correct place in the M-Files Vault. The pre-requisite for this is that M-Files client has been set up on the computer that you want to use and that the vault is visible on the computer as a drive letter. The second pre-requisite is that the computer has a minimum of Microsoft Outlook 2007. This will not work with prior versions of Outlook.

In this setup I will be using as an example a person in a company who wants to capture all "Requests" to M-Files.

1) As you will want to classify emails that are processed with these steps the first thing you will need to do in M-Files is setup a classification in M-Files Administrator. In this example I have setup an "Incoming Request" class.

2) As there may be some specific metadata that you want captured you may want to create properties in the M-Files Administrator prior to setting up Outlook. I have created a "Requester Email Address" property definition.

Property Definition Properties - New Property Definition

General | Automatic Values | Validation | Permissions

Name: Requester Email Address

Data type: Text

Content: E-mail address

Show values from the following list:

_____ Filter...

Filter the list by using the value of the following property:

_____

Sort values in the list in the following order:

_____

Allow using this property with the following object type:

Document

☐ Enable automatic permissions via this property

OK   Cancel   Apply   Help

3) We will now need to set the M-Files properties inside Outlook. In Outlook you should see an M-Files folder; this gets created by default when you install the M-Files client. Under that folder you should see one folder listed per vault that has been setup in the M-Files client settings. You can create subfolders under the vaults that can represent different rules that you may want to apply to different email messages received using Outlook. In this example I will create a subfolder called "Incoming Requests".
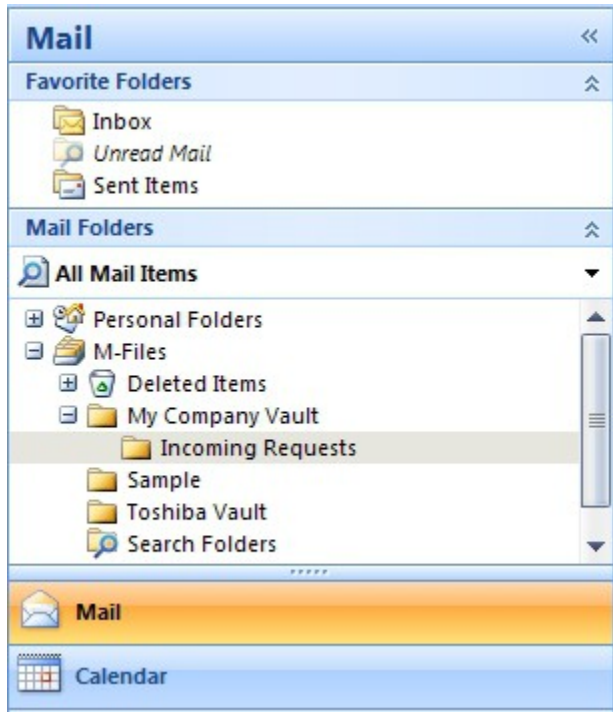
Right click on "My Company Vault" and select "New Folder" from the context menu. Now label the new folder as per a short description that will make it easily identified. The creation of subfolders is only done to allow for multiple rules to be created and if you are only creating one rule (step 5) you are not required to create a sub-folder but it is advisable for future possible changes or rule additions.

4) Right click on the new folder under the vault (in this example "Incoming Requests") and select

Open
Open in New Window
Move "Incoming Requests"...
Copy "Incoming Requests"...
Delete "Incoming Requests"
Rename "Incoming Requests"...
New Folder...
Add to Favorite Folders
Mark All as Read
Save Pending Messages to M-Files...
Specify M-Files Properties...
Process All Marked Headers
Process Marked Headers
Properties
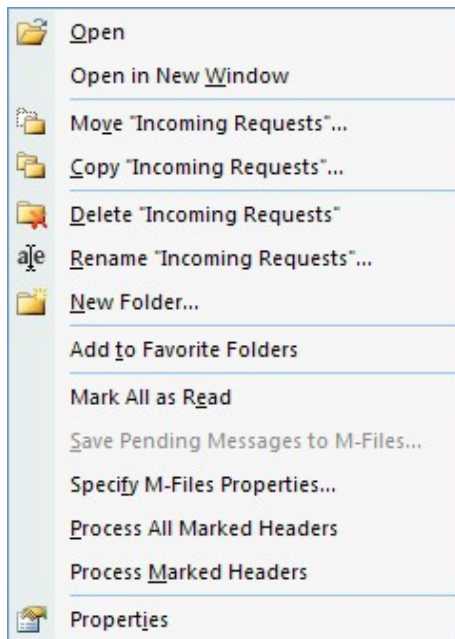
In the Properties window that is displayed you will need to add in a number of properties. You will do this by clicking the add button. At any point you can set the permissions and check or uncheck the box to make all email items processed available in M-Files to all users by using the box "Common to all users".
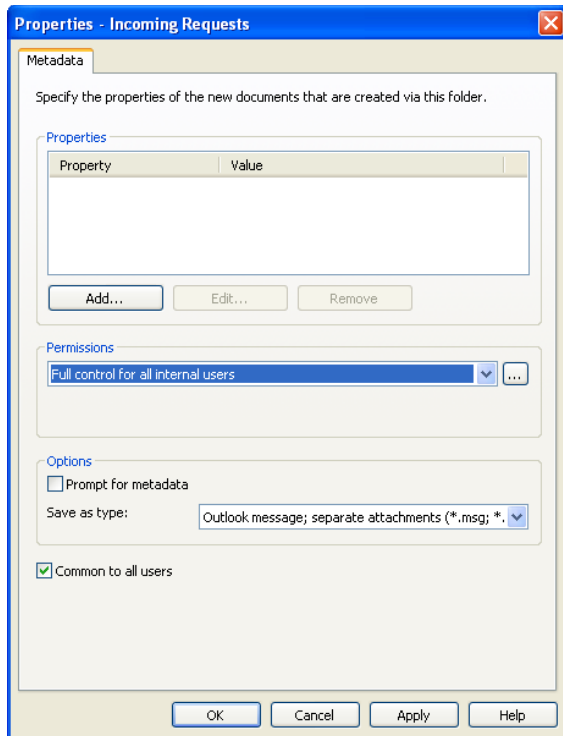
In this example I want all mail that gets directed into this folder by the Outlook Rules (step 5) to be placed into the class "Incoming Requests". The first property that I add is the class property and set the value to a fixed value of "Incoming Requests" (class setup in Step.1)
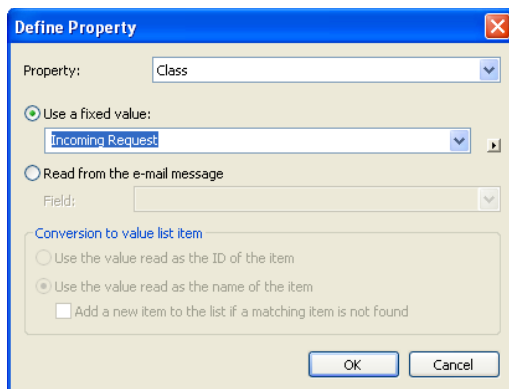
Now we will add in other properties. Note that in all of the other properties, I have used the "Read from the email message" and have mapped the email message fields to existing properties in M-Files.

In this example we will use the following mapping:

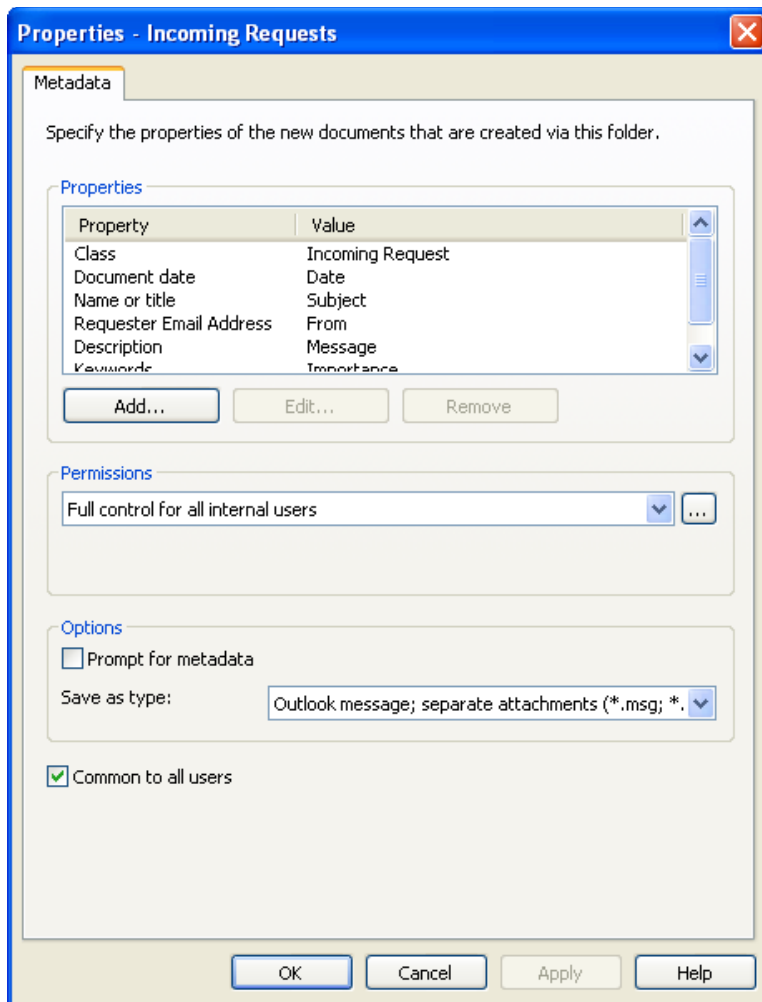"Document Date" mapped to Outlook message date

"Description" mapped to Outlook message

"Name/Title" mapped to Outlook subject

"Keywords" mapped to Outlook importance

If you are using importance it may be a good idea to create an M-Files property specific for this.

The following diagram shows the Property Column (M-Files properties) and the Value (Outlook message field)


In this example, I have unchecked "Prompt for metadata" as I want this to be fully automated. I have also selected to separate the message from the attachments so that I will be able to see the message and related attachments in M-Files as related but separate files.

When all of the fields have been mapped, click ok.

5) We will now create a Rule in Microsoft Outlook Rules that will look for any subject that contains the word "Request". You will probably want to make your rules more specific to capture only the messages that you want going into M-Files as the danger can be that too many messages get sent to M-Files.

   In the Outlook rules, specify that all messages that meet these criteria get moved to the just created M-Files folder so that the message will be in M-Files only and no longer appear in the local user's message folder.

   In this case, I have specified that all messages that contain the word "Requests" will be moved into the M-Files folder in Outlook, "Incoming Requests", which is located under "My Company Vault"
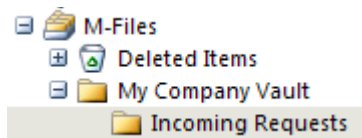
   Additional information: Any messages that go into the M-Files folders in Outlook get moved into M-Files and removed from the folder in Outlook. This is an automatic process.

6) As one final step, you should try to send an email that will match your rules to make sure that it will go into the correct place in M-Files.