



Intelligent Information Management

Installation

Step 1:

Install Microsoft .NET Framework 1.1. This is free and can be downloaded from:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=262d25e3-f589-4842-8157-034d1e7cf3a3&DisplayLang=en>

Step 2:

Before installing the plug-in you must make sure that the Office Primary Interop Assemblies are installed. If you have installed Microsoft Office using the complete installation (and not customised installation) then you should not worry about this because the Microsoft Office 2003 primary interop assemblies are installed during a complete installation of Office. However if you need to install this, please refer to "Installing Office Primary Interop Assemblies.pdf".

Step 3:

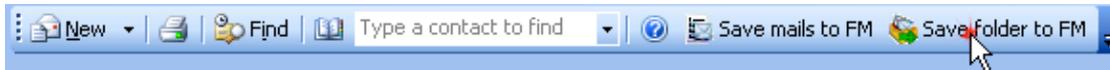
Install G2 Outlook2FM MailSaver.

Step 5:

Run Microsoft Outlook.

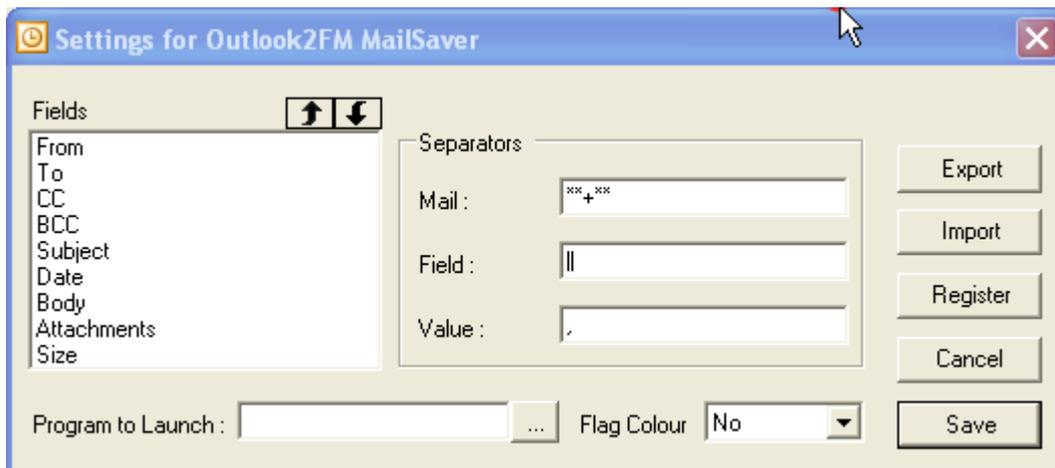
Instructions

After installation, you will see two new buttons in MS Outlook menu bar. "Save mails to FM" and "Save folder to FM", these are the buttons which perform the main functions of this plug-in.



However, before using the Plug-in you will need to adjust the settings.

- 1- Click on Tools from the menu bar and select Save mails2FM > Export FM setting to see the following window:



This panel is now described in detail;

Fields

The Fields section indicates the list of fields that will be sent to FileMaker. You can change the order in this list by selecting an item and clicking on the "Up" and "Down" buttons.

Separators

The information that will be sent to FileMaker is formatted as a string with the information separated from each other by a separator character, much the same as a csv file. Here, you can define the separator characters. You must ensure that the characters that you choose will not create confusion by getting mixed up with the same characters in the content of the fields.

Mail Separator: Specifies the character used to separate emails.

Field Separator: Specifies the character used to separate the fields inside each email.

Value Separator: Specifies the character used to separate the values inside a field inside each email. e.g. email addresses inside the CC field.

Flag Colour

Items saved to FileMaker are flagged after the operation. Here you can define the flag colour.

Trigger file

The plug-in works by triggering a FileMaker file. You will have to create this file and script it according to your requirements. Once you have done so, you can tell Outlook2FM where to look for your file in the usual way that you locate a file. If you leave this field empty nothing will happen after running the plug-in. However, the information is copied to the clipboard and you can paste it anywhere you like.

What should the Trigger file look like?

Although you will be designing the majority of the functionality of this file, there are some basic requirements that will need to be observed.

- 1- The file needs to have at least one Text field.
- 2- There must be a Startup script that has at least one script step that pastes the clipboard into the text field.
- 3- The last script step must close this file.
- 4- Additional functions including parsing the text field must take place between script steps 2 and 3 above.
- 5- File options must be set to perform this script at startup.

Export

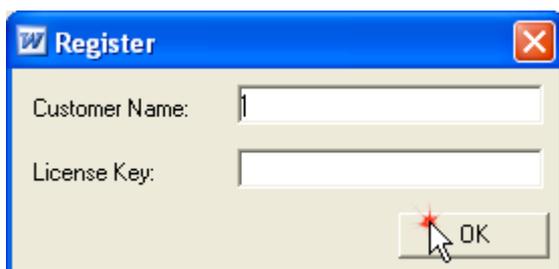
You can save your current settings by exporting it. This will create an XML file that you can recall for later use via the Import button. If you place the exported XML file besides the installation file, when the plug-in is installed, the settings will be the default setting.

Import

This button imports a previously exported XML file and sets up your settings accordingly.

Register

The Demo version runs 30 times. After purchasing the plug-in, you will receive a License key. Enter your client's name and the license key here. Please note that each copy of the plug-in is licensed to one client organisation.

A screenshot of a Windows-style dialog box titled "Register". The dialog has a blue title bar with a close button (X) in the top right corner. Inside the dialog, there are two text input fields. The first is labeled "Customer Name:" and the second is labeled "License Key:". Below the "License Key:" field, there is an "OK" button with a mouse cursor pointing at it. The dialog box has a light beige background and a blue border.

Save

Once you have finished click on this button to save your settings and start using the plug-in.