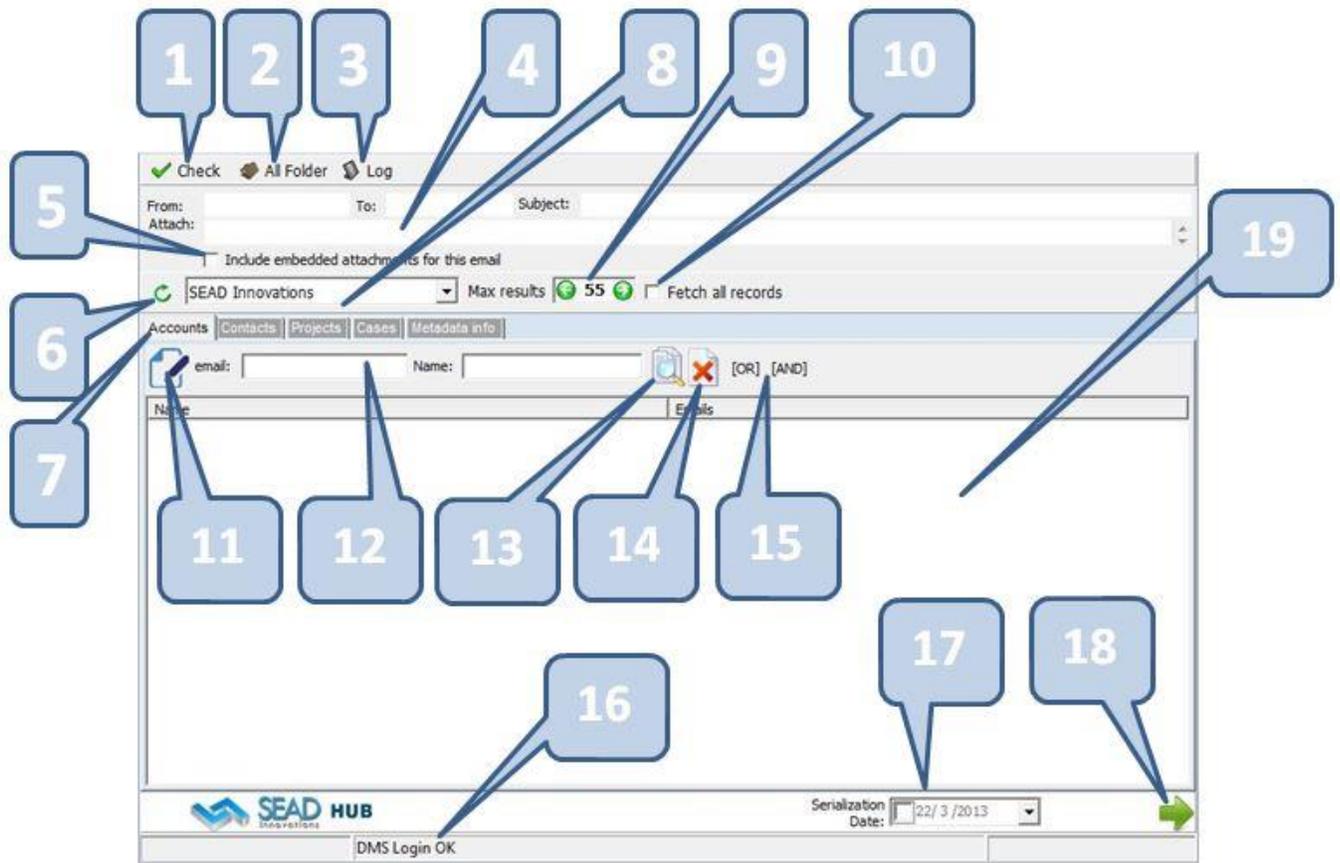


Using SEAD HUB Outlook Plugin



1 Check: Checks if all the emails in the selected folder is archived. The process starts from the older email in the selected folder and checks the DMS system to verify if the email is already archived.

The system is archiving the emails creating one folder for every email with folder name in the following format:

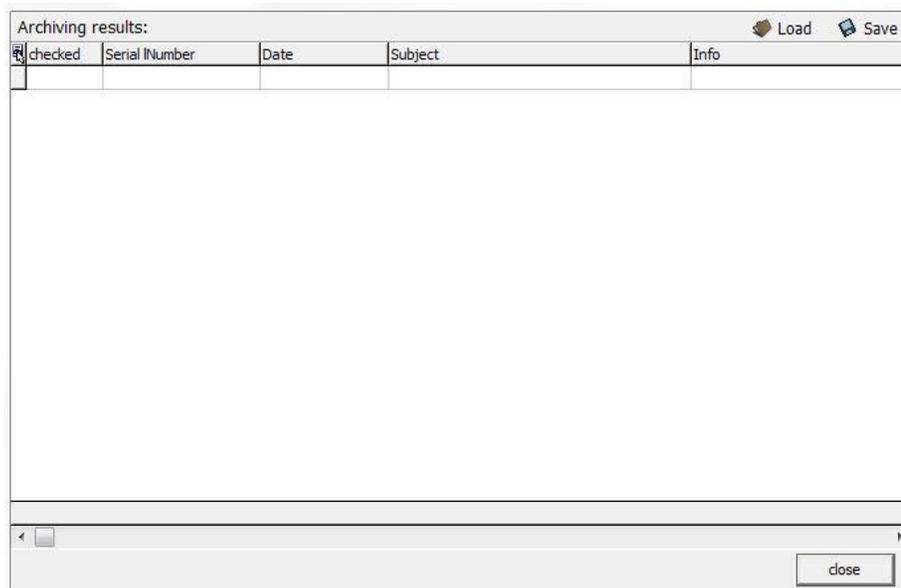


YYYYMMDD HHMMSS <email subject>

The YYYYMMDD is the received date and HHMMSS is the received time.

Therefore if an email matches the date-time and subject it is considered as “already archived” and the archived flag is marked for that email in outlook.

- 2 All Folder:** Proceed with archiving for every email in the selected folder. All the automations, as declared in settings, will perform before the email proceed with archive. Therefore any CRM objects (Accounts, Related Contacts, Projects, Case) will automatically create along with the corresponding folders in the document management system.
- 3 Log:** This button will open a new window that holds a detailed log with every email (one per row) archived with the “All Folder” process. With double click on the serial number column of that log you can open the DMS in the exact folder of the selected email in DMS. This log can be saved to a csv file for later process.



checked	Serial Number	Date	Subject	Info
---------	---------------	------	---------	------

- 4 From/To/Subject/Attach:** In these fields the system displays the selected email details. From, To, Subject and the attachments if there are any.
- 5 Include embedded attachments for this email:** If checked and the option “don’t include embedded attachments” is selected in settings page you can override that option and include embedded attachments for this particular email.
This checkbox is automatically unchecked every time the user selects a new email from the outlook emails list.
- 6 Refresh:** This button will “refresh” the selection and proceed with the automations selected in options for the selected email. Therefore it will scan for Accounts, Contacts, Project, Cases using the emails metadata (From, To, email folder) and create the corresponding objects in the CRM.

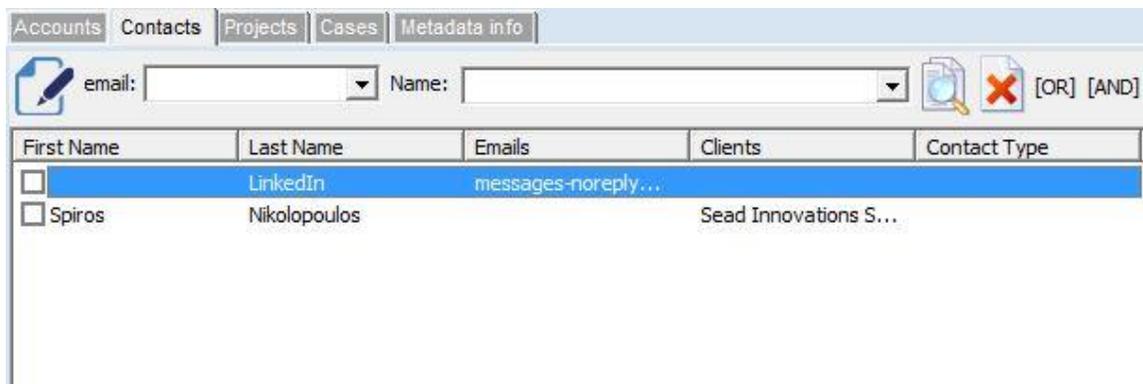
7

Accounts/Contacts/Projects/Cases/Metadata info: The tabs that manipulate the CRM objects you can relate with the selected email.

You can search among Accounts, Contacts, Projects and Cases using the search fields. 12

There are “email” and “name” fields for the accounts and contacts objects and “name” only field for Projects and Cases Objects. All that fields are automatically filled in with the selected email’s metadata. Sender, receiver, CC mails for contacts and metadata resolved from the folder structure based on the setting. You can insert a “custom” name or email to search for the CRM object and relate with the selected email.

The search starts with the 13 button or you can clear the search fields with the 14

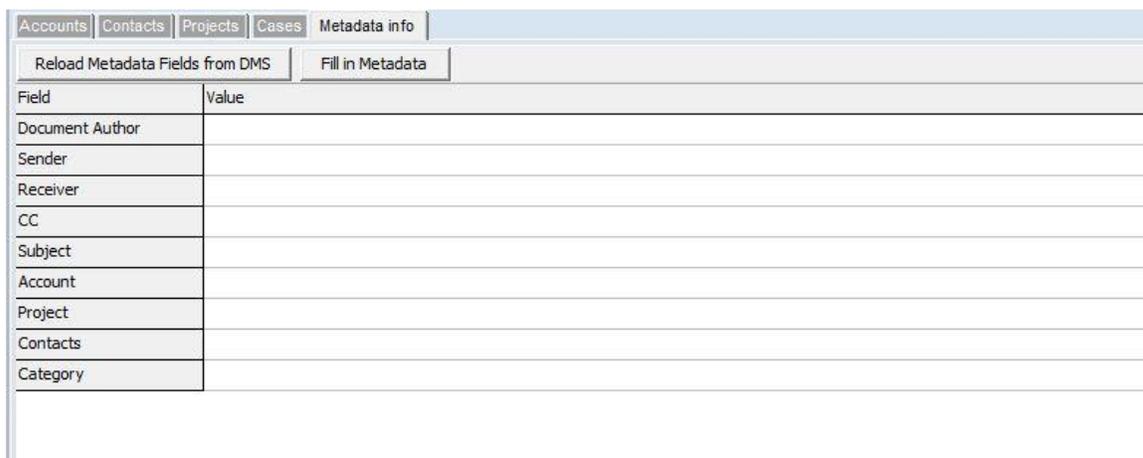


For the contacts tab, you can search with email or name of the contact. You can search for more than one contacts using the “[OR]” like: “Steve [OR] Margaret” . 15

All the searches are performed with the contains method. So a search with “ma [OR] to” will include results as **M**argaret, **T**ony, **A**ntony, **H**arman etc.

You can override the “contains” method in searches by checking the “exact match” option in settings.

In the **metadata info** tab the user can enter the metadata of the knowledgetree fields or check the automated entries as they are configured in settings



8

Firm Drop down selection: Select from one or more firms as declared in Settings. The CRMDMSHUB can use more than one firm and use a separate file system for every one of them. There should be a separate SugarCRM installation for every firm and the URL setting are declared in the Setting form.

9

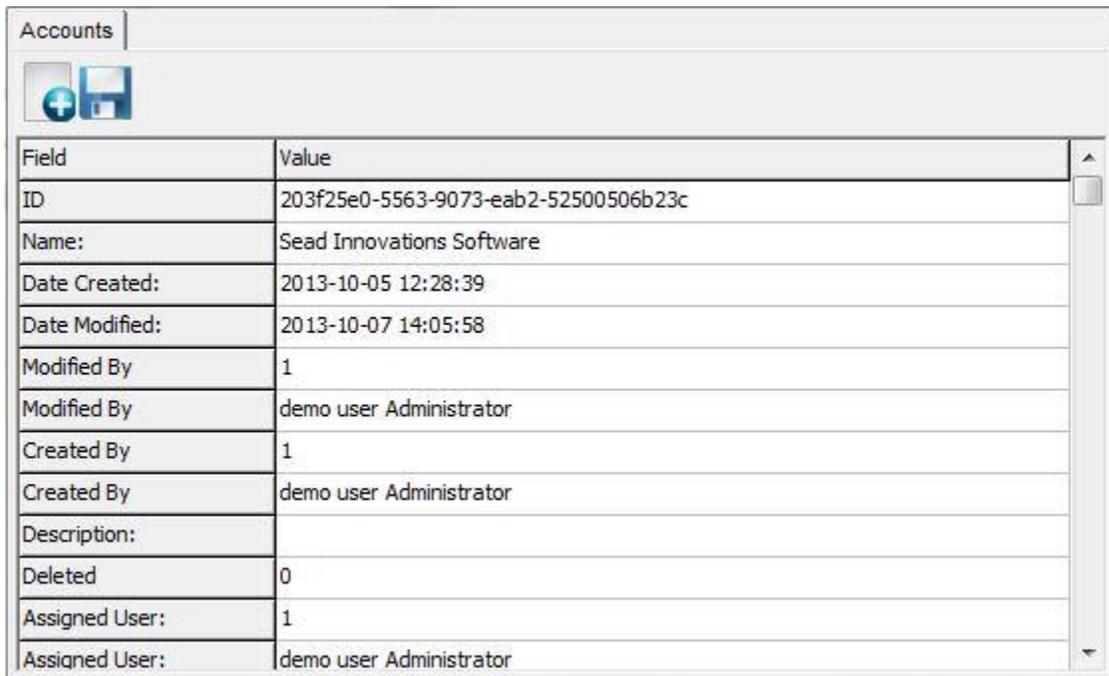
Max Results: The maximum results (rows) a search can produce. Keep this number as low as possible in order to minimize the traffic and keep the search requests fast.

10

Fetch All Records: With this option you can override the maximum results of a search and force the system to return all rows. Please use this option only when there aren't many records in the CRM objects otherwise there will be delay when waiting for search results.

11

Edit CRM Object: Using this icon a new form is appearing where you can insert or update the selected CRM object.



Field	Value
ID	203f25e0-5563-9073-eab2-52500506b23c
Name:	Sead Innovations Software
Date Created:	2013-10-05 12:28:39
Date Modified:	2013-10-07 14:05:58
Modified By	1
Modified By	demo user Administrator
Created By	1
Created By	demo user Administrator
Description:	
Deleted	0
Assigned User:	1
Assigned User:	demo user Administrator

16

Status bar: The status bar showing the process state while the system uploads the DMS system with the selected emails and their attachments

17

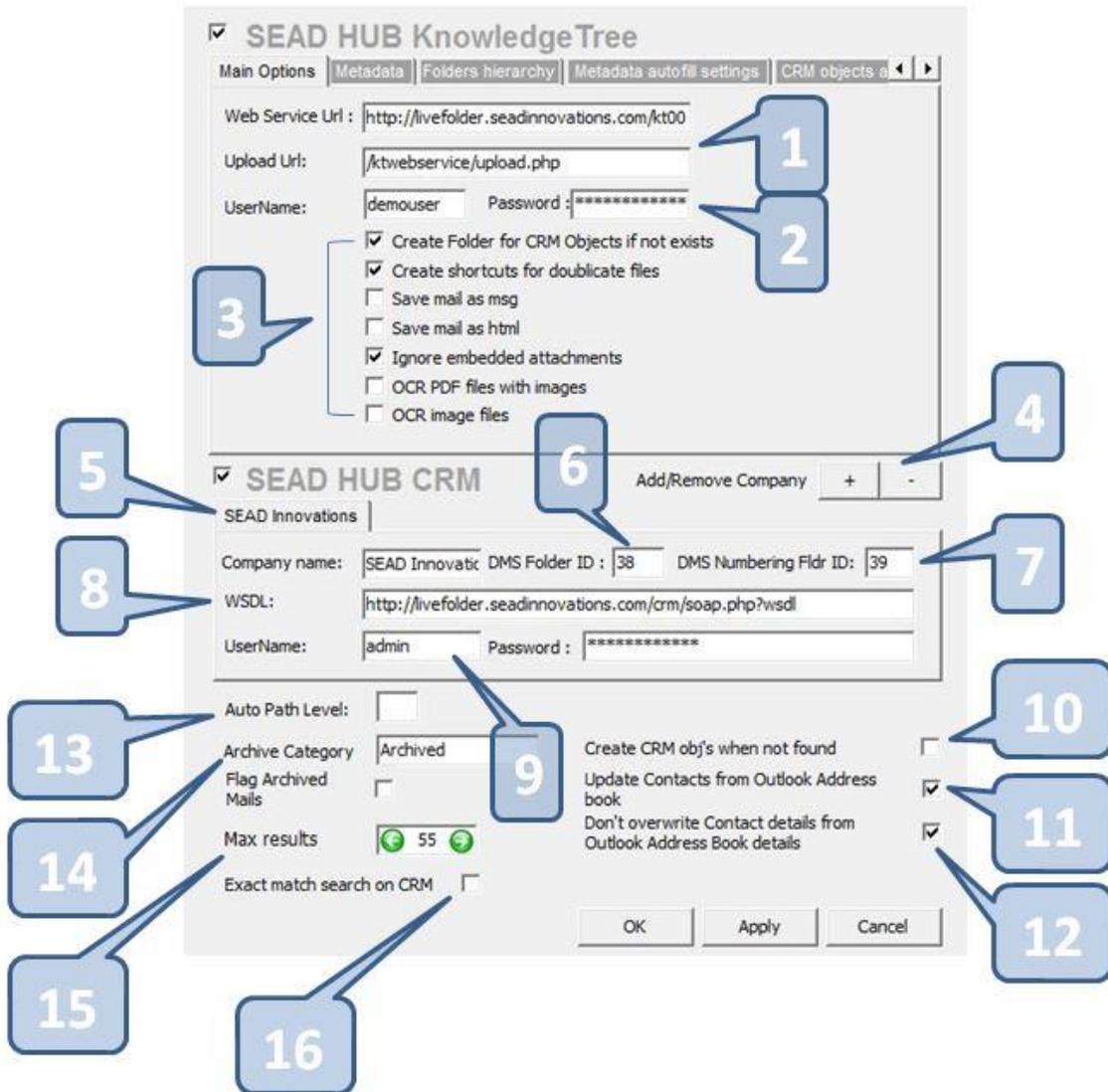
Serialization date: The date entered in this field is used for the serialization process. If it is checked, this date is used instead of the received date.



18

Start: This is the “start” button that begins the archive process for the selected email.

SEAD HUB Configuration



1

The URLs for the SOAP connection to KnowledgeTree DMS along with the upload handle service URL.

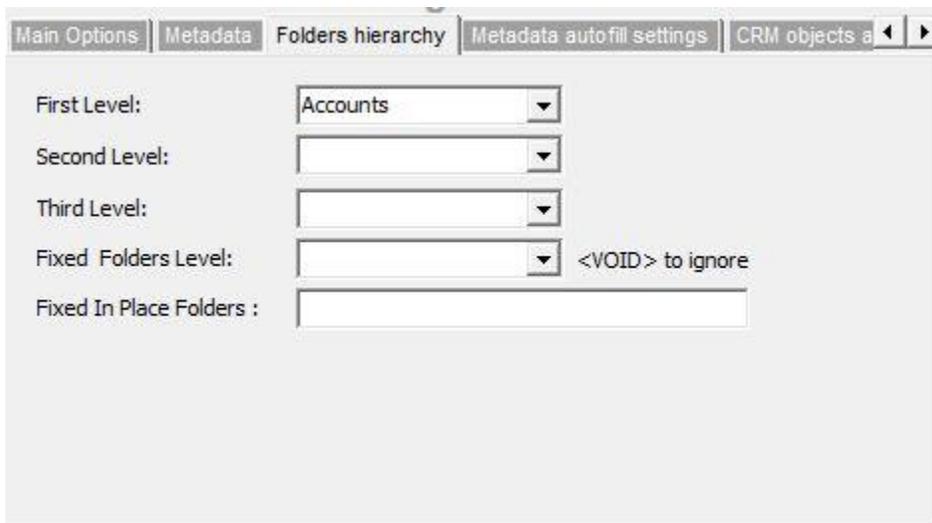
2

The username and password the SEAD HUB is using to connect the DMS.

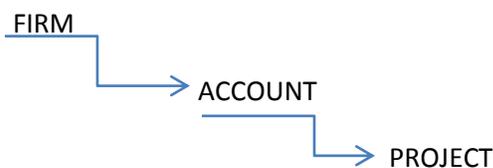
3

Basic settings for the DMS upload and archiving process.

1. Create folder for CRM objects if not exists: During the upload process the folders for each CRM object will be created if they do not already exist. The folders are created as declared in the “Folders hierarchy” tab



You can select (from the drop down) the CRM object that will be included in the folders hierarchy creation in the DMS system. That way if you select first level as “Accounts” and second level as “Projects” then the emails will be archived in the DMS with the following structure:



In that case the “Account” and “Project” declaration in CRM Objects searches are mandatory.

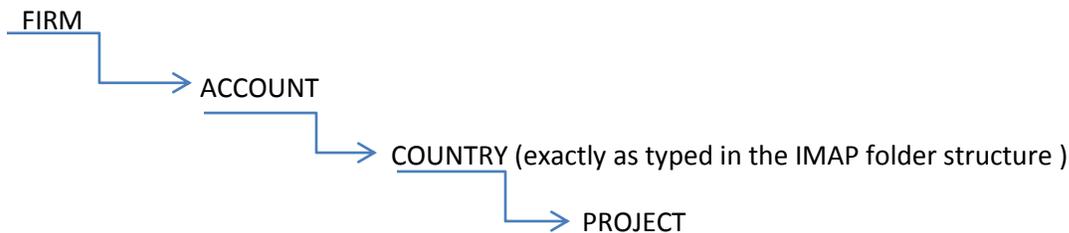
The **fixed folder level** indicates the level in the current path, of the selected email, during the archive that will be created as DMS folder if it does not exist. The folder levels are as following for an email path in a Gmail IMAP folder structure test environment:

dev.sead@gmail\[Gmail]\Firm2\<VOID>\Account\Country\Project



0:dev.sead@gmail.com (1)
1:[Gmail]
2:Firm2 (A test firm name)
3:<VOID>
4:Account (an Account name)
5:Country (a folder that indicates a country)
6:Project (a Project name)

In the above example if we select as fixed folder the level 5 then the above folder structure will be:



for every archived email and attachment. The <VOID> clause will keep the IMAP folder hierarchy intact, so that SEAD HUB will find at the same level the same kind of information (etc Firm at level 2 and Account at level 4 for the above path) but there will be no folder creation in the DMS for that place.

The **fixed in place folder** can hold a set of comma separated words that the SEAD Hub will create as folder in the DMS everywhere they are encountered.
etc FORMAL DOCUMENTS,DRAFT DOCUMENTS.

So if there is an email in an IMAP folder with the following path

\[Gmail]\SEAD\Nestle\Greece\SEAD HUB\DRAFT DOCUMENTS

The SEAD HUB will create the folder “DRAFT DOCUMENTS” in the project folder “SEAD HUB” (if it does not exists) and will archive the selected email in that folder.

2. Create Shortcuts for duplicate files: With this option checked, the SEAD HUB will calculate the CRC of each file before upload and if a file with the same CRC already exists the system will consider it as identical and therefore will create a symbolic link to this file rather than upload it again. This will save huge amount of space in an everyday work environment.

There is one limitation for the symbolic links. You can't have separate metadata fields declared for the symbolic link. The symbolic link shares the same metadata with the original uploaded file.

3. Save files as msg: With this option checked, all the emails are saved as msg files in the DMS system. This method of archiving has the advantage of keeping the emails exactly as they received/send without separating the email text and the attachments but also have the disadvantage that the shortcuts, for duplicate files, will not work if you choose to archive emails as msg files.

The CRC of identical emails saved as msg are not the same because the msg files are changing themselves every time they saved. Date and time of last save are included in the header of every msg file. This is by design and cannot be changed.

Also emails archived as msg is not available for instant preview in the web browser.

4. Save email as HTML: With this check you can select to archive emails (the email body only) as html format. This will keep the email format with colors and fonts intact. Otherwise the email body of every archived email will saved as pure UTF8 text.

5. OCR files with images: This option will check if archived PDF files are in the need of OCR process and an OCR process will performed for every file. After that a file with the same name but with the extension _OCRTEXT.txt will included in the upload with the OCR text produced.

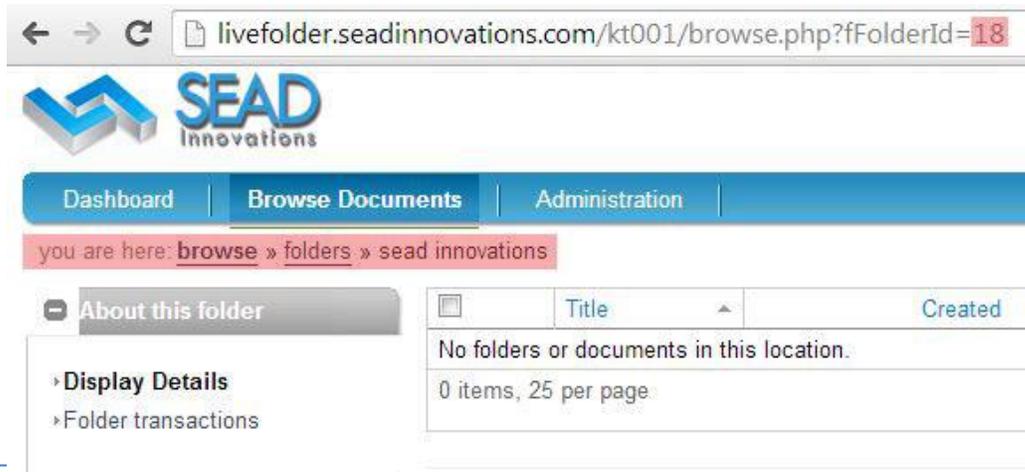
The OCR that is used for the OCR process is the tesseract-ocr.

Note: The demo SEAD HUB will not include this feature.

6. OCR image files: With this option checked, the SEAD HUB will perform OCR in every known image format file. (jpg, gif, png etc)

4 Add Remove Company. SEAD HUB can work with multiple Companies or completely separate firms that need to include a discrete CRM installation often on a different physical server. With the +,- buttons you can add or remove a company declaration and enter separate settings for each of them in its tab **5**

6 DMS Folder ID/DMS Numbering Folder ID. Each company declaration should have those two numbers in order for the archive process to locate, without delays, the root folders for the company declared. You can locate those numbers when you create a folder in the knowledgetree DMS by the folder URL after **fFolderId=** parameter



7 The **DMS Numbering Fldr ID** holds the ID of the folder that holds the Serialization indexes. Serialization index is a file that holds the last Serial number given during archive for an email or file.

The serialization of SEAD HUB is in the following format: **YYYYMMNNNNNNNN** where

YYYY is the serialization date year

MM is the serialization date month

NNNNNNNN the next available number for year YYYY and month MM.

8 **WSDL**. The URL of the sugarCRM installation for the company declared in “Company name”. This URL is used by the system on the SOAP connection.

9 The **Username** and **Password** for the sugarCRM installation.

10 If the **Create CRM objects when not found** is checked and the **Exact Match** option is also checked then the SEAD HUB will create automatically the corresponding sugarCRM object that is not found in any search. For example, with those two options checked if you enter in name search field for the projects tab the words “SEAD HUB” and after search there will be no search results (the “SEAD HUB” does not exist as a Project) then a new project named “SEAD HUB” will be created automatically.

This combination of options implements the automation of email archiving using only a simple drag and drop from the inbox or outbox to a prepared local or IMAP folder that is parameterized with the settings in **3**

11 With the **update obj from outlook address book** checked the SEAD HUB will update with contacts CRM contacts from the details of the outlook address book.

12 **Don't overwrite contacts from outlook address book details**. If this option is checked the SEAD HUB will not overwrite contact details of a contact already entered in CRM with the details from the Outlook Address Book if the **update obj from outlook address book** is checked.

13 **Auto path level** holds the level in path where the SEAD HUB will find the company in a multi company setup.

dev.sead@gmail\[Gmail]\Firm2\<VOID>\Account\Country\Project



In the above path the company is in level 2. "Firm 2" will be the automatic selection in company field if the exact company name is delacared in set of companies.

14

The **archived category** holds the category name that SEAD HUB will assign when an email is succesfully archived. When **Flag emails archived** is checked then the SEAD HUB will also flag the emails that was succesfully archived. The main deference between category and flag is that the category is only visible in local outlook but the flag if visible to every outlook client because it is saved in imap server.

15

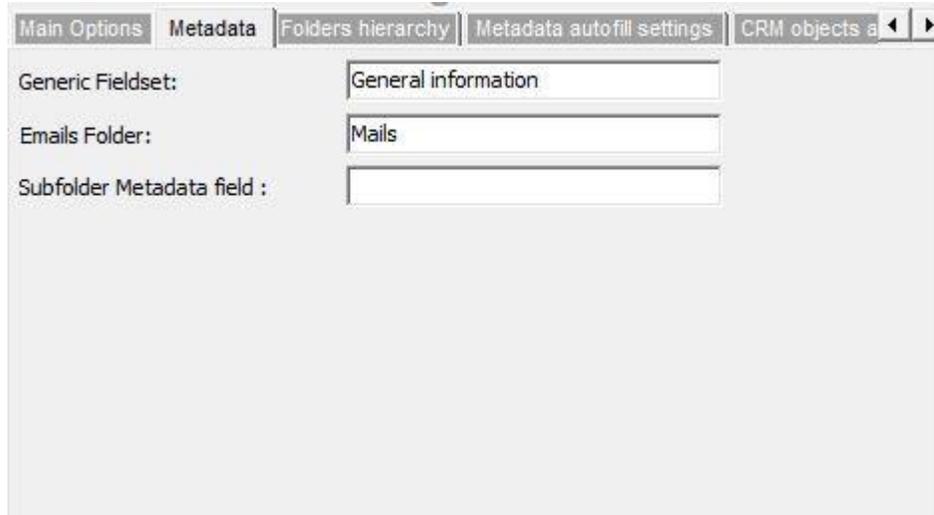
Max results holds the global maximum results a search will return.

16

If **Exact match on CRM is** checked then during searches the CRM objects returned must fully exists and not only contains the words entered.

The Metadata tab

The Metadata tab contains 3 fields:

A screenshot of a software interface showing the 'Metadata' tab. The tab is selected among others: 'Main Options', 'Metadata', 'Folders hierarchy', 'Metadata autofill settings', and 'CRM objects a'. The 'Metadata' tab contains three input fields: 'Generic Fieldset:' with the value 'General information', 'Emails Folder:' with the value 'Mails', and 'Subfolder Metadata field :' which is currently empty.

Generic Fieldset: Is the name of the Knowledgetree DMS field set that holds the metadata fields used by the SEAD HUB.

Email Folder: Is the optional folder name to create as subfolder when archiving emails.

Subfolder Metadata field: Declare a field from the generic field set. The value from that field will be used as a subfolder name when archiving emails.

Metadata auto fill settings

Field	Value
Document Author	
Sender	Sender email
Receiver	Receiver email
CC	CC email
Subject	Subject
Account	CRM Client
Project	CRM Project
Contacts	CRM Contact Receiver Name
Category	

The **Metadata auto fill settings** tab holds the automatic values a metadata field can get during the archive. The lists of available values are:

Company: The active company name from the list of companies

Sender email: The senders email from the current selected mail

Receiver email: The receivers email from the current selected mail

CC email: All the CC emails from the current selected mail

Date Time: The exact Received date and time of the selected mail

Date Only: The Received Date only

Attachment (Y/N): YES if the email has attachments, NO if not

Attachment names: The filenames of the selected mail attachments

A/A Numbering: The serial Number as calculated during archive.

Subject: The subject of the selected mail

CRM Client: The related Account name from CRM objects search

CRM Project: The related Project name from CRM object search

CRM Case: The related Case name from CRM object search



CRM Contact Sender Name: The related Contact name from CRM object search marked as sender

CRM Contact Receiver Name: The related Contact name from CRM object search marked as receiver

CRM Contact CC Name: The group related Contact(s) name(s) from CRM object search marked as CC

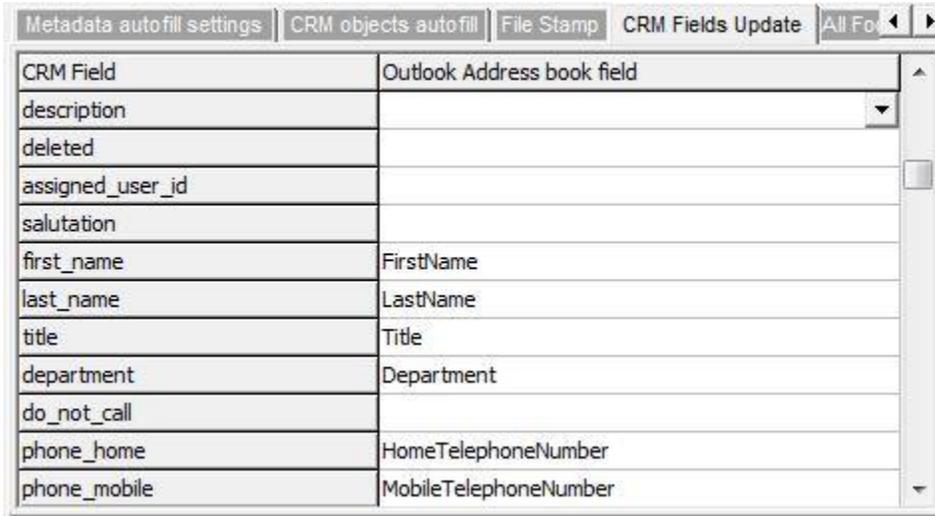
Folder Level 1 ... 10: The folder name of the folders structure path where the selected email is in the path level declared here.

So if folder level is set to "Folder Level 3" and the email is saved in an IMAP folder like:

\\[Gmail]\\SEAD\\Nestle\\Greece\\SEAD HUB\\DRAFT DOCUMENTS

The value in that field will be "Greece".

CRM Fields Update

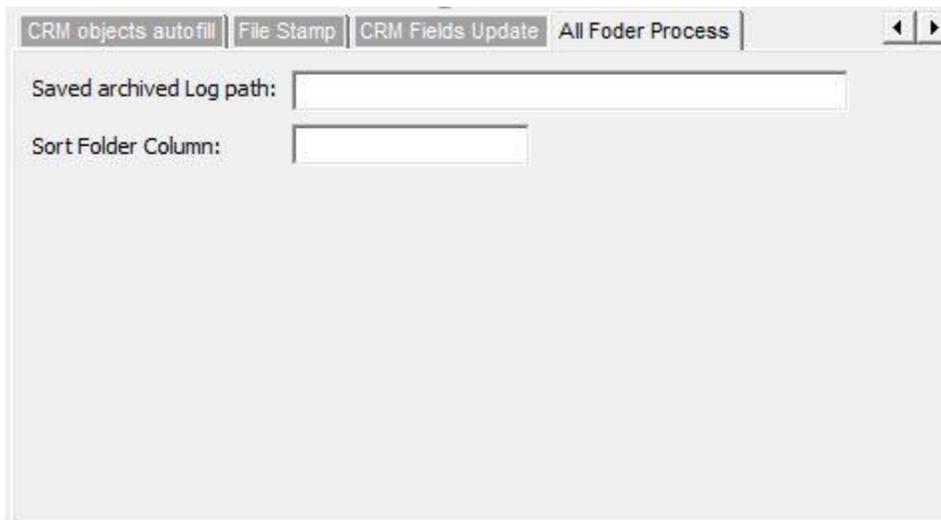


The screenshot shows a dialog box with a tabbed interface. The active tab is 'CRM Fields Update'. The dialog contains a table with two columns: 'CRM Field' and 'Outlook Address book field'. The table lists various CRM fields and their corresponding Outlook fields.

CRM Field	Outlook Address book field
description	
deleted	
assigned_user_id	
salutation	
first_name	FirstName
last_name	LastName
title	Title
department	Department
do_not_call	
phone_home	HomeTelephoneNumber
phone_mobile	MobileTelephoneNumber

The **CRM Fields Update** maps the CRM fields with the outlook address field.

All Folder Process



The screenshot shows a dialog box with a tabbed interface. The active tab is 'All Folder Process'. The dialog contains two text input fields:

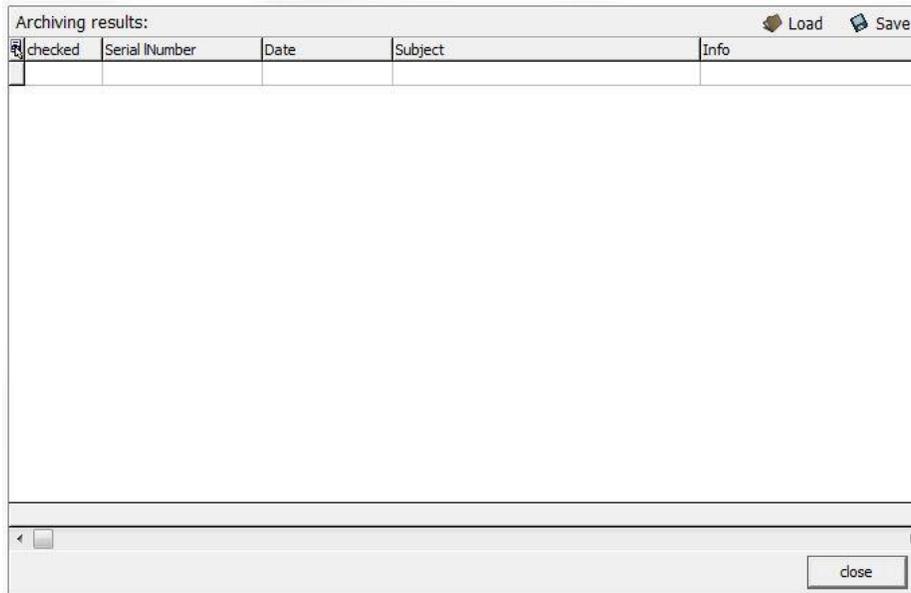
Saved archived Log path:

Sort Folder Column:

The **All Folder Process** tab has two fields:

1. **Saved archived Log path** that holds the UNC or a local path of the automated full folder process Log file path.

2. **Sort Folder Column** is the number of the column the Log should be sorted with.

A screenshot of a software dialog box titled "Archiving results:". The dialog has a title bar with "Load" and "Save" buttons. Below the title bar is a table with five columns: "checked", "Serial Number", "Date", "Subject", and "Info". The "checked" column contains a single checkmark. The rest of the table is empty. At the bottom right of the dialog is a "close" button.

checked	Serial Number	Date	Subject	Info
<input checked="" type="checkbox"/>				