



DocMoto

Email Importer Application

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Introduction

This document guides you through the features and functions within DocMoto's Email Importer Application.

The Email Importer Application enables businesses to intelligently:

1. File Emails directly from the businesses' email server into appropriate folders in DocMoto – without user intervention.
2. Archive Emails.
3. Create standard rule sets that can be applied to all (or some) users.
4. Create pattern matches for mailboxes, including IMAP Public Folders.
5. Exclude Emails from import.
6. De-duplicate emails.
7. Attachment management.
8. Index content on emails and attachments.

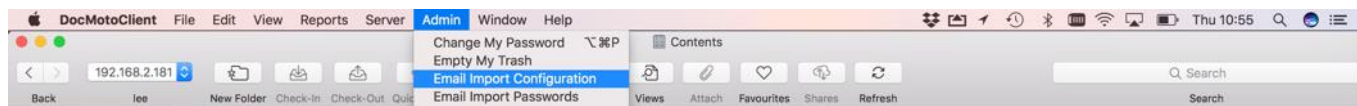
Examples are listed throughout the guide along with helpful tips & tricks, screenshots.

The Administration User Interface:

The administration user interface for the **Email Importer Application** is available to administrators and users depending on the configuration. The majority of this manual is applicable to administrators but also covers certain user based functions.

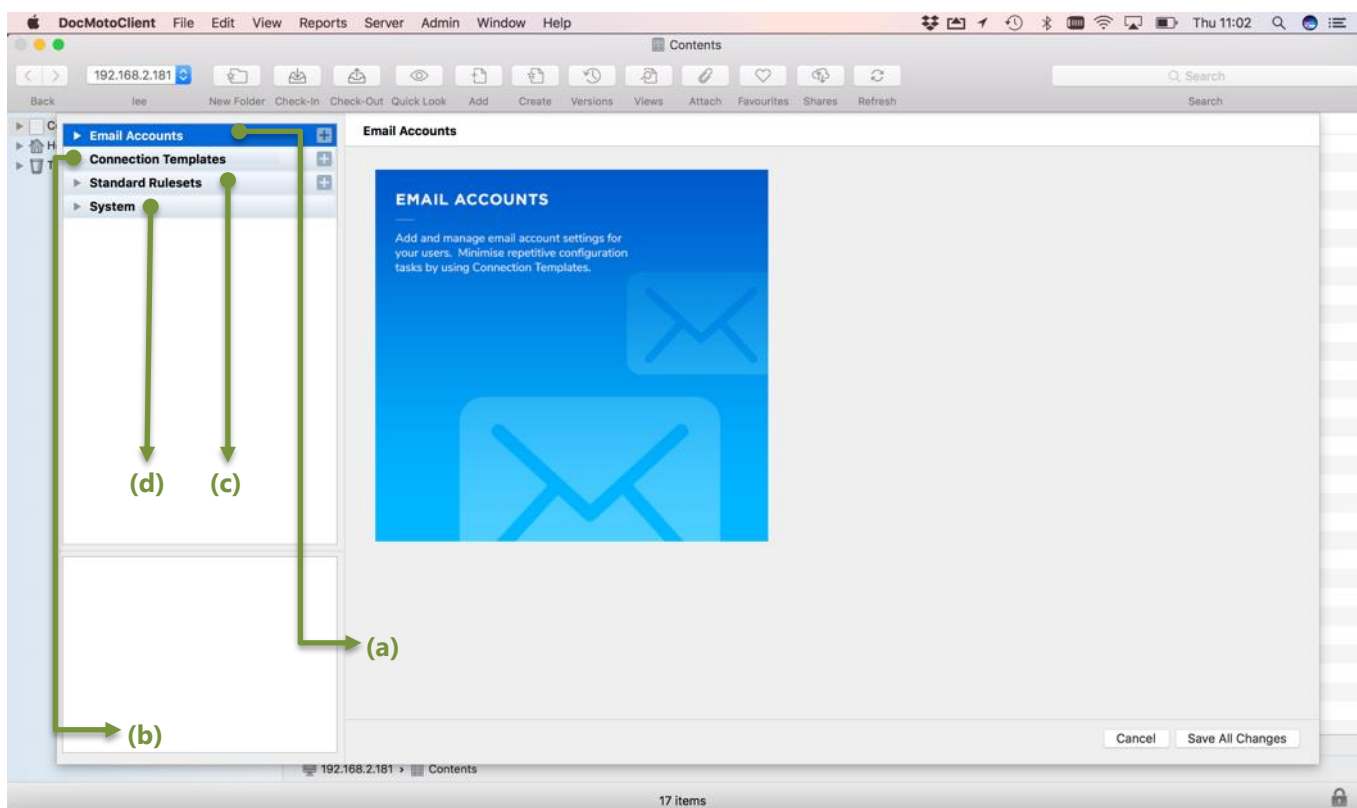
To open the **Email Import Configuration**, select from the **Admin** menu as shown in [Fig. Email Import Configuration – menu item](#).

Fig. Email Import Configuration – menu item:



The **Email Import Configuration** administration user interface is presented as shown in [Fig. Email Import Configuration – interface](#).

Fig. Email Import Configuration – interface:



(a) Email Accounts – Add and manage email account settings for your users. Minimise repetitive tasks using **Connection Templates**.

(b) Connection Templates – Add and manage connection templates. Connection templates streamline the process of adding email accounts and monitored mail box folders.

(c) Standard Rulesets – Add and manage rule sets. Rule sets filter and process messages by a series of rules. Use rule sets for common tasks such as filtering blacklists.

(d) System – Add and manage mail import settings.

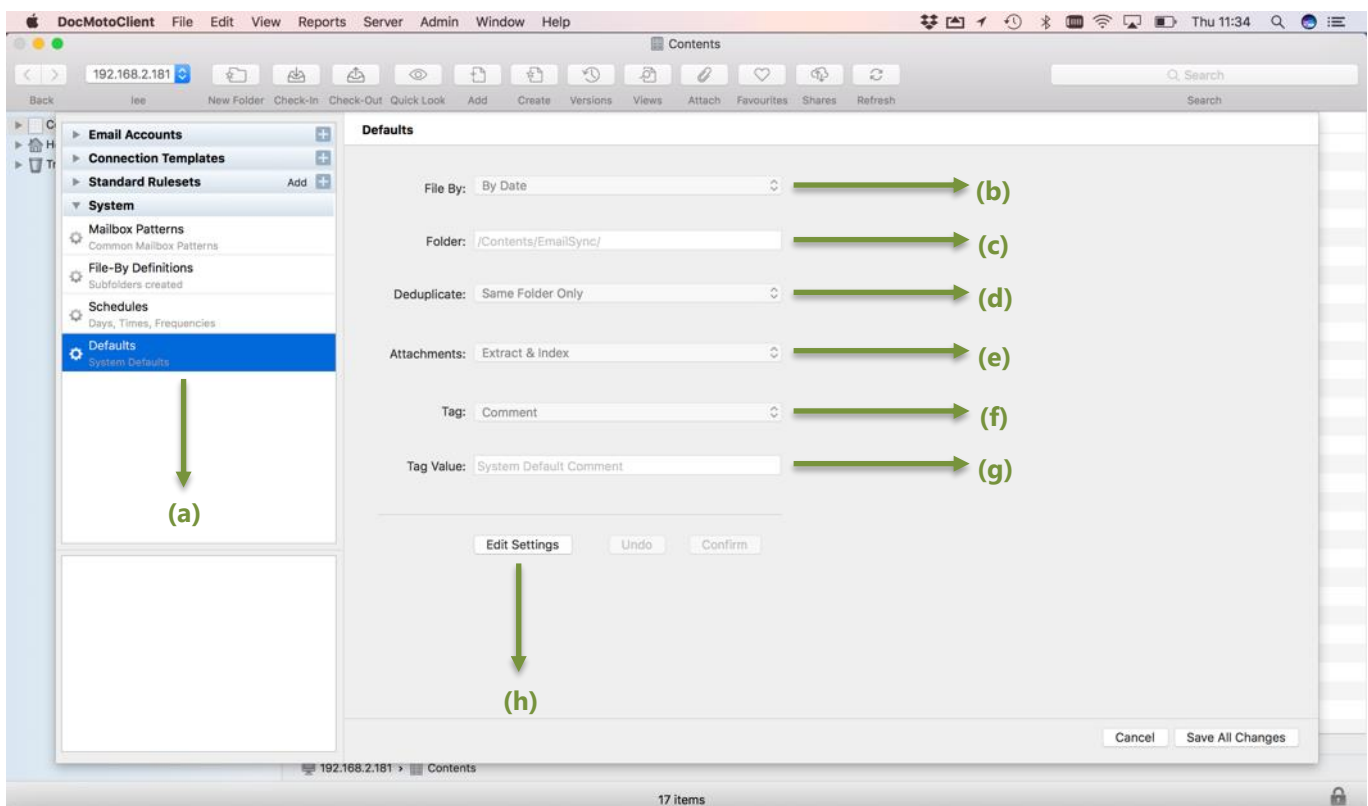
Note: When the **Email Import Configuration** interface is presented the four sections are expanded to show the content. The screenshot illustrates the four main areas of configuration in one screen. Administrators can expand and contract the areas as necessary.

System – Email Import Configuration:

The **System** section of the Email Import Configuration deals with:

1. **Mailbox Patterns** – Unique pattern matching for mailboxes (user based mailboxes or public mailboxes).
2. **File-By Definitions** – Unique pattern matching for filing emails.
3. **Schedules** – System schedules for polling the email server.
4. **Defaults** – System defaults for:
 - a. File By.
 - b. Folder.
 - c. De-duplicate.
 - d. Attachments.
 - e. Tag.
 - f. Tag Value.

Fig. System – Defaults:



(a) **Defaults** – Select to view or edit **System** defaults.

(b) **File By:**

- By Date.
- By From Domain.
- Business defined “**File By**”.

(c) **Folder** – Business defined folder in DocMoto to file emails that adhere to a rule but do not have a specific import folder defined by a rule.

(d) **De-duplicate** – Rule to check email(s) do not already exist in the system and therefore stop duplication. The two settings are:

- Same Folder Only.
- Cross Folders.

(e) **Attachments** – Settings for managing attachments. The three settings are:

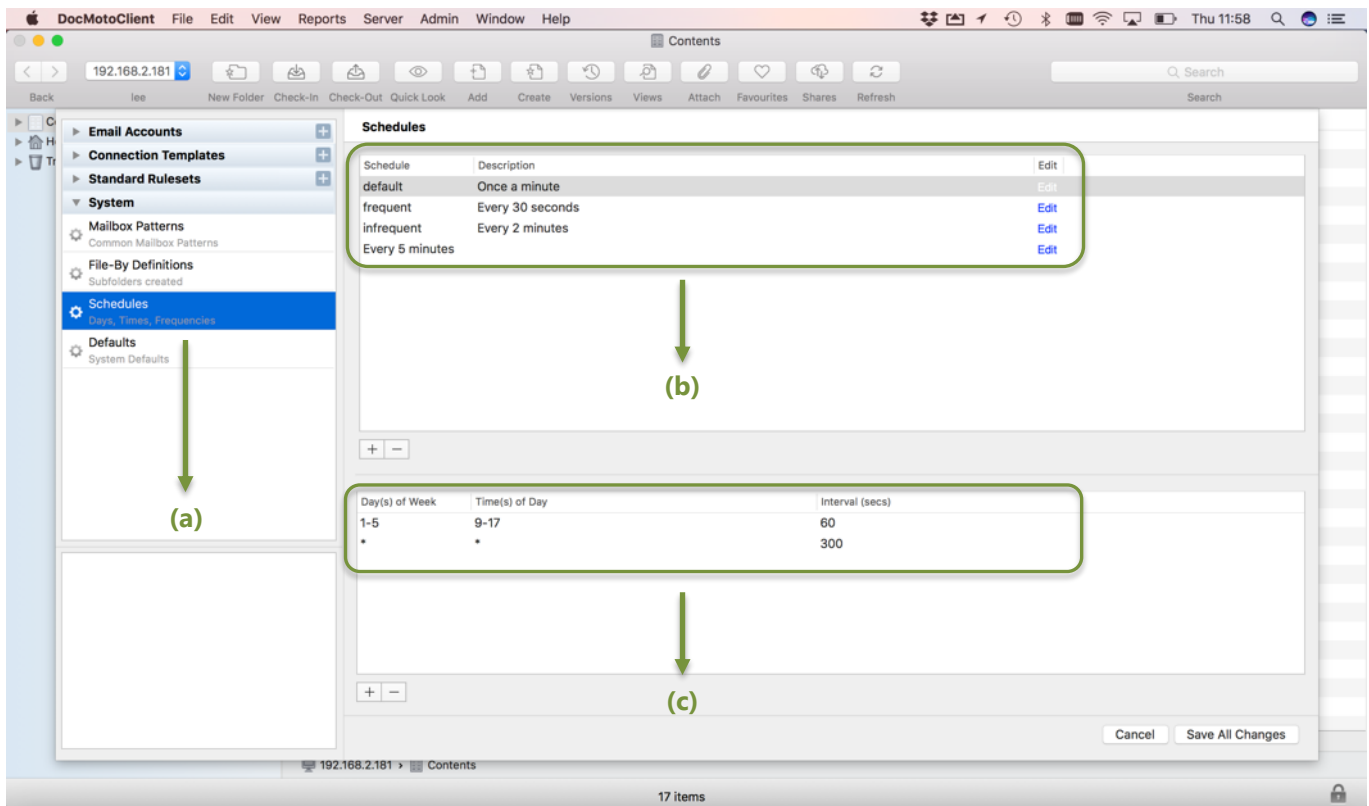
- Ignore – Do nothing with attachments.
- Index Only – Index the content of attachments.
- Extract & Index – Extract a copy of any/all attachments, create sub folder linked to email and populate with attachment then index all items.

(f) Tag – Set a default tag for imported emails. This can be overridden by rules and will only apply if a rule does not stipulate a tag.

(g) Tag Value – Set a default tag value for imported emails. This can be overridden by rules and will only apply if a rule does not stipulate a tag value.

(h) Edit Settings – Select to adjust the System Defaults.

Fig. System – Schedules:



(a) Schedules - Select to view or edit **Schedules** defaults.

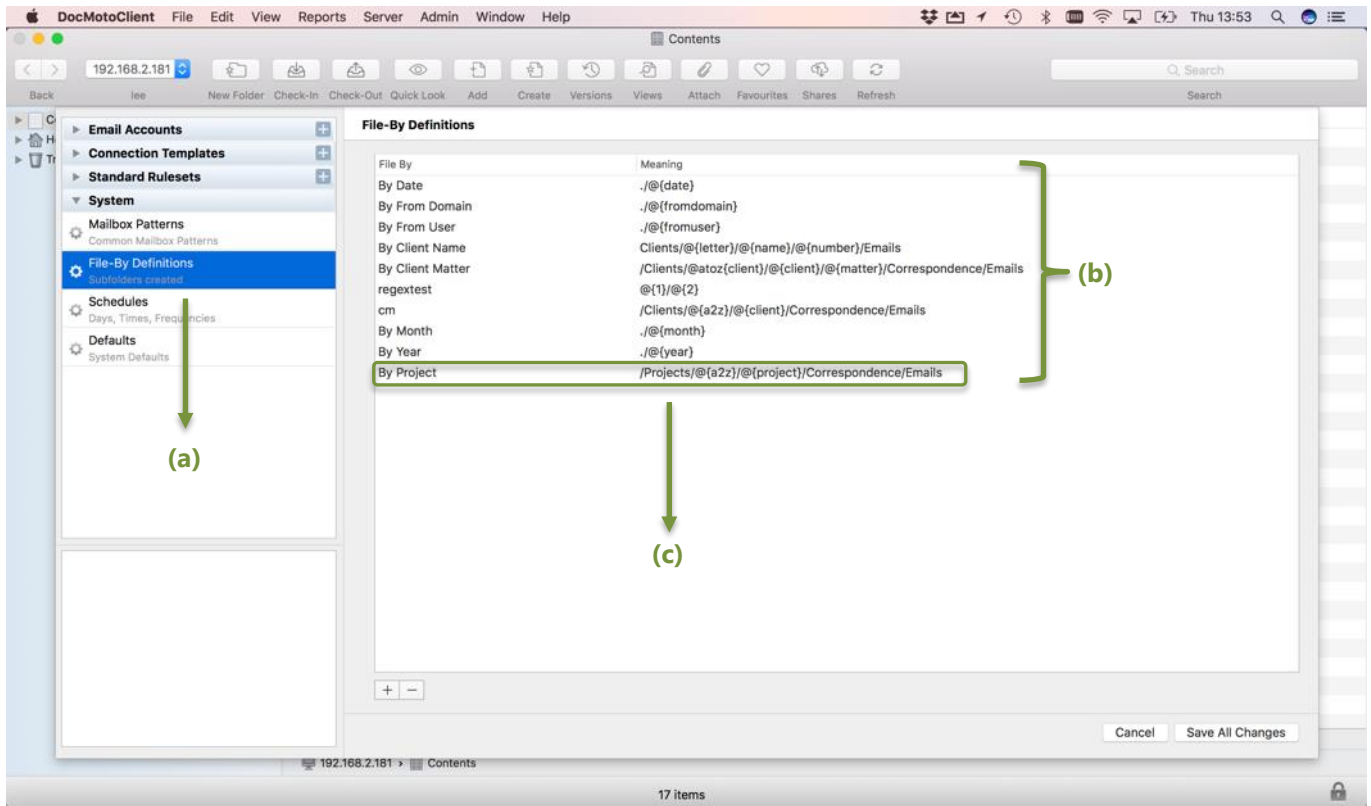
(b) Schedules definitions – Select the **Edit** option to change the:

- **default** – timings.
- **frequent** – timings.
- **infrequent** – timings.

(c) Day(s) of Week – Stipulates the days of the week the routines run; with the following meanings:

- **Days** – 1 = Monday, 5 = Friday etc, 0 or 7 = Sunday and * means every day.
- **Times** – 24-hour clock, 0 = start of the day and 24 = end of the day.

Fig. System – File-By Definitions (example):

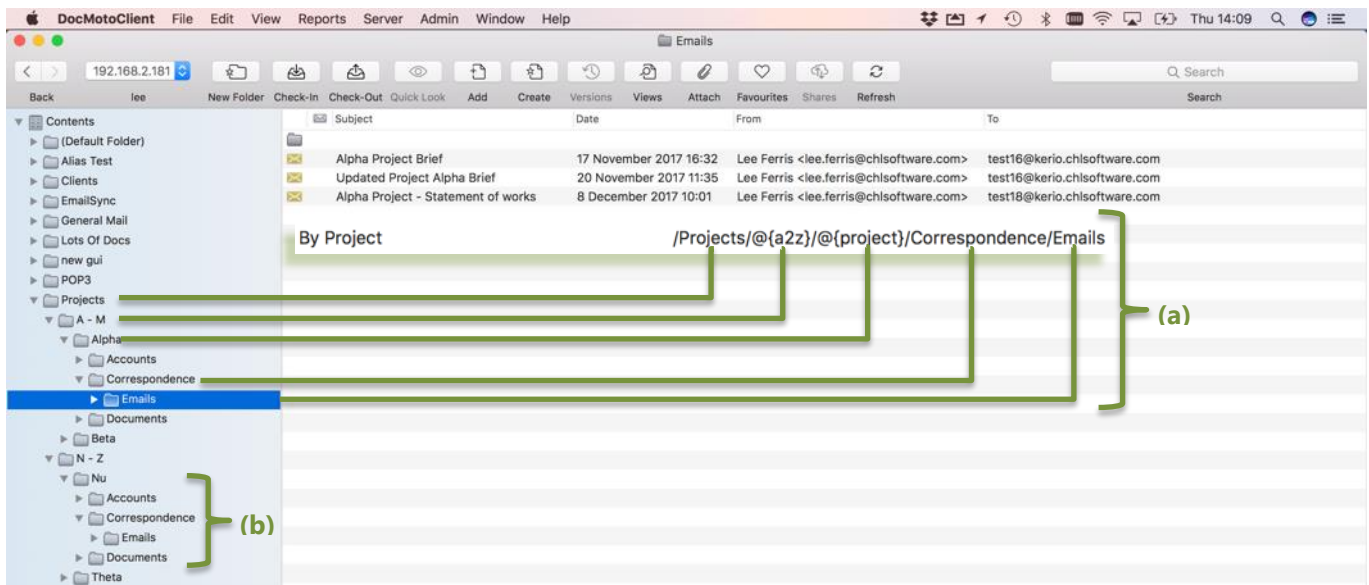


(a) **File-By Definitions GUI** - Select to view or edit **File-By Definitions**.

(b) **File-By Definitions (patterns)** – patterns the Filed-By routines follow.

(c) **By Project** – A custom **Filed-By Definition**. This custom **File-By Definition** works in conjunction with a folder template, namely **New Project** and the folder & file structure within a DocMoto system. [Fig. File-By Definition – By Project](#) – illustrates.

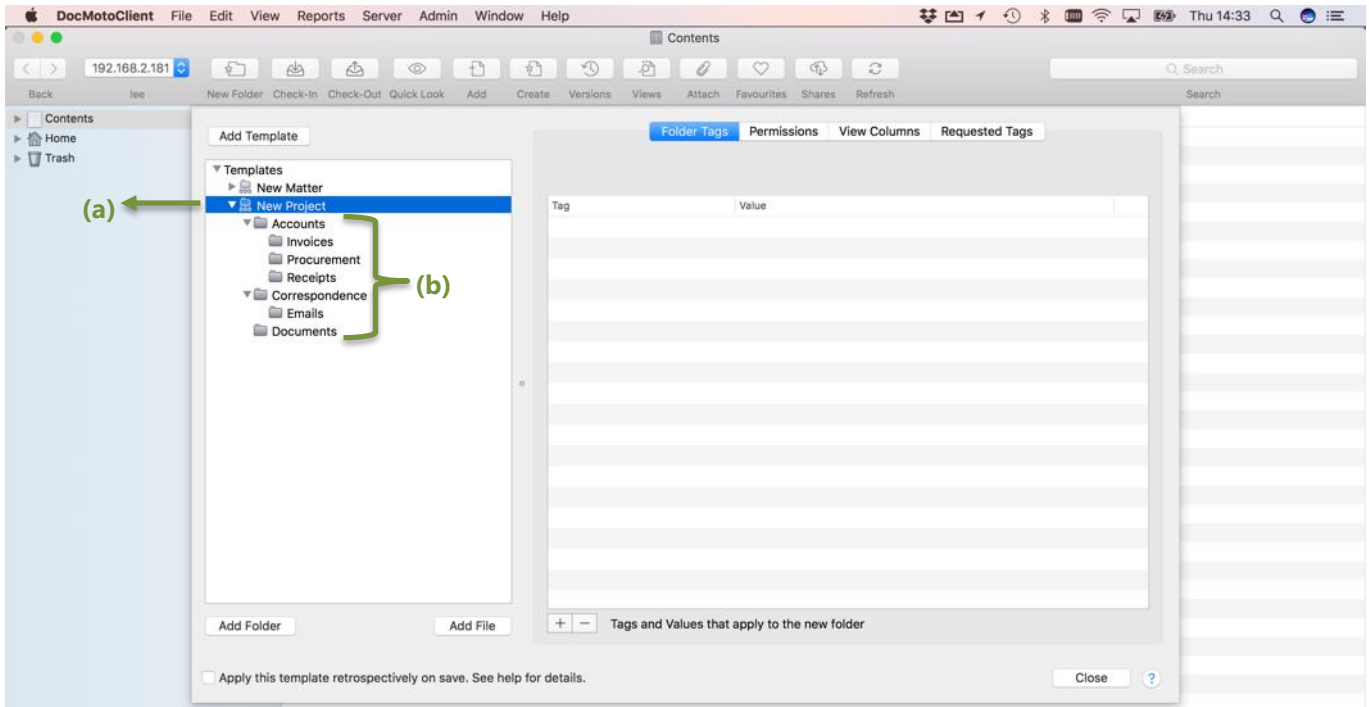
Fig. File-By Definition – By Project (example):



(a) **By Project – File-By Definition** mapping to folder structure in DocMoto. Created by system and folder template.

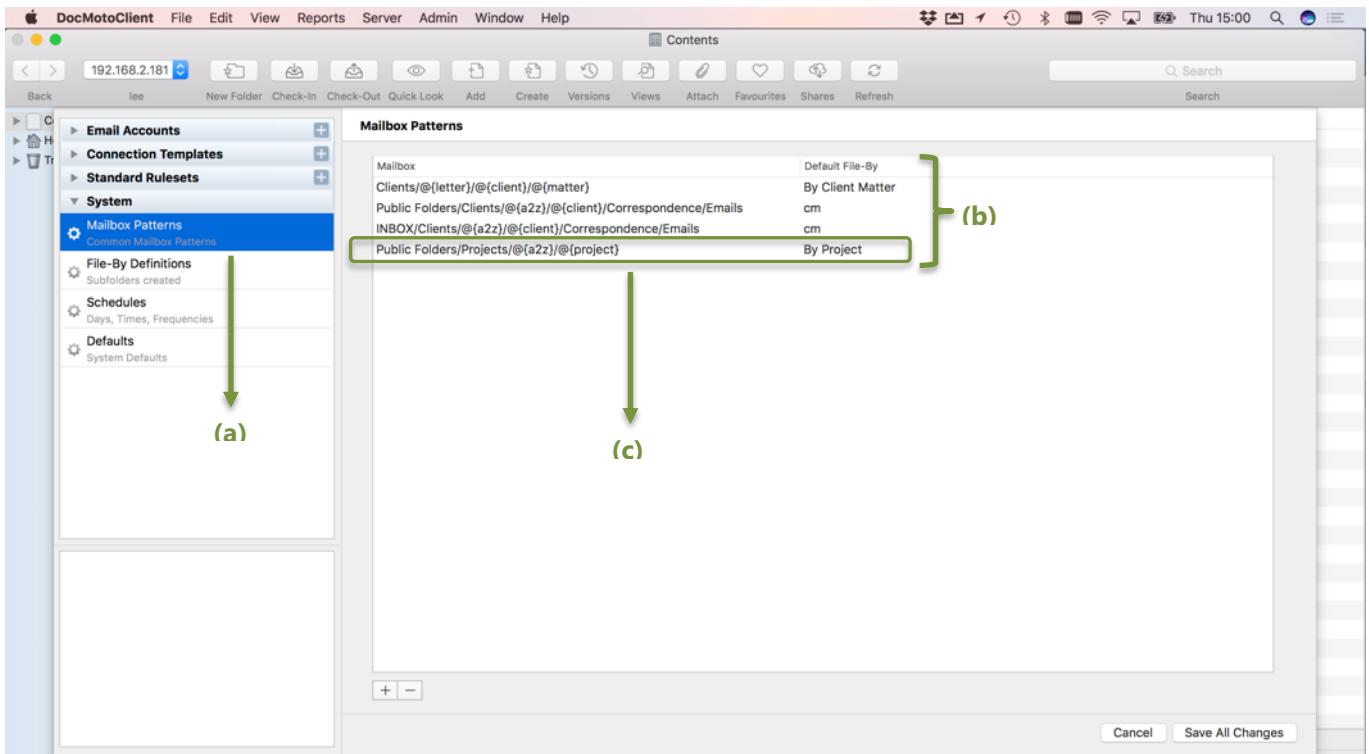
(b) **Nu (project)** – Created by folder template **New Project**. Beta, Theta projects also created by folder template. Refer to [Fig. New Project Folder Template](#).

Fig. New Project Folder Template:



- (a) New Project Folder Template.
- (b) Structure created by the folder template New Project.

Fig. System – Mailbox Patterns:

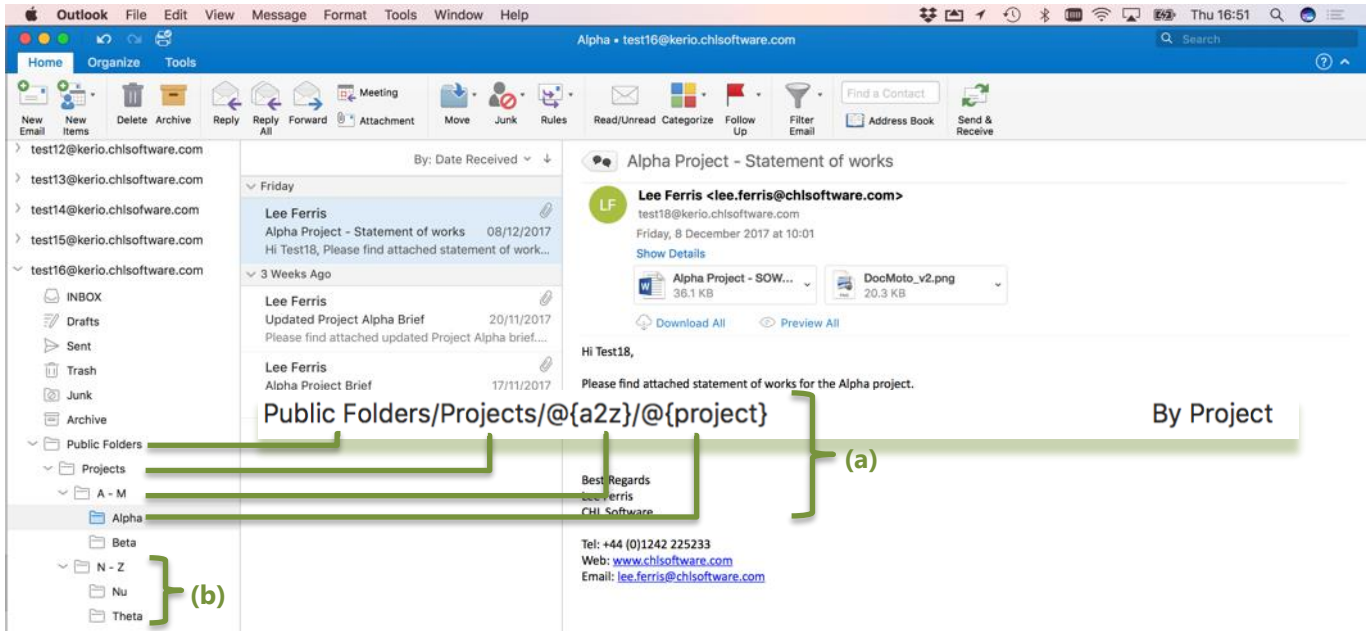


(a) **Mailbox Patterns GUI**- Select to view or edit **Mailbox Patterns**.

(b) **Mailbox Patterns** – Custom patterns DocMoto filters and imports emails via.

(c) **By Project (mailbox pattern)** - A custom **mailbox pattern**. This custom **By Project** mailbox pattern works in conjunction with public folders created on an IMAP mail system. [Fig. Mailbox Pattern – By Project \(example\)](#) – illustrates.

Fig. Mailbox Pattern – By Project (example):



(a) **By Project – Mailbox Pattern** mapping to folder structure in IMAP public folders. The IMAP public folders created by the mail system, this example has a user subscribing to the public folders via MS Outlook. Other mail clients (Apple Mail, Gmail, Postbox, etc) work the same.

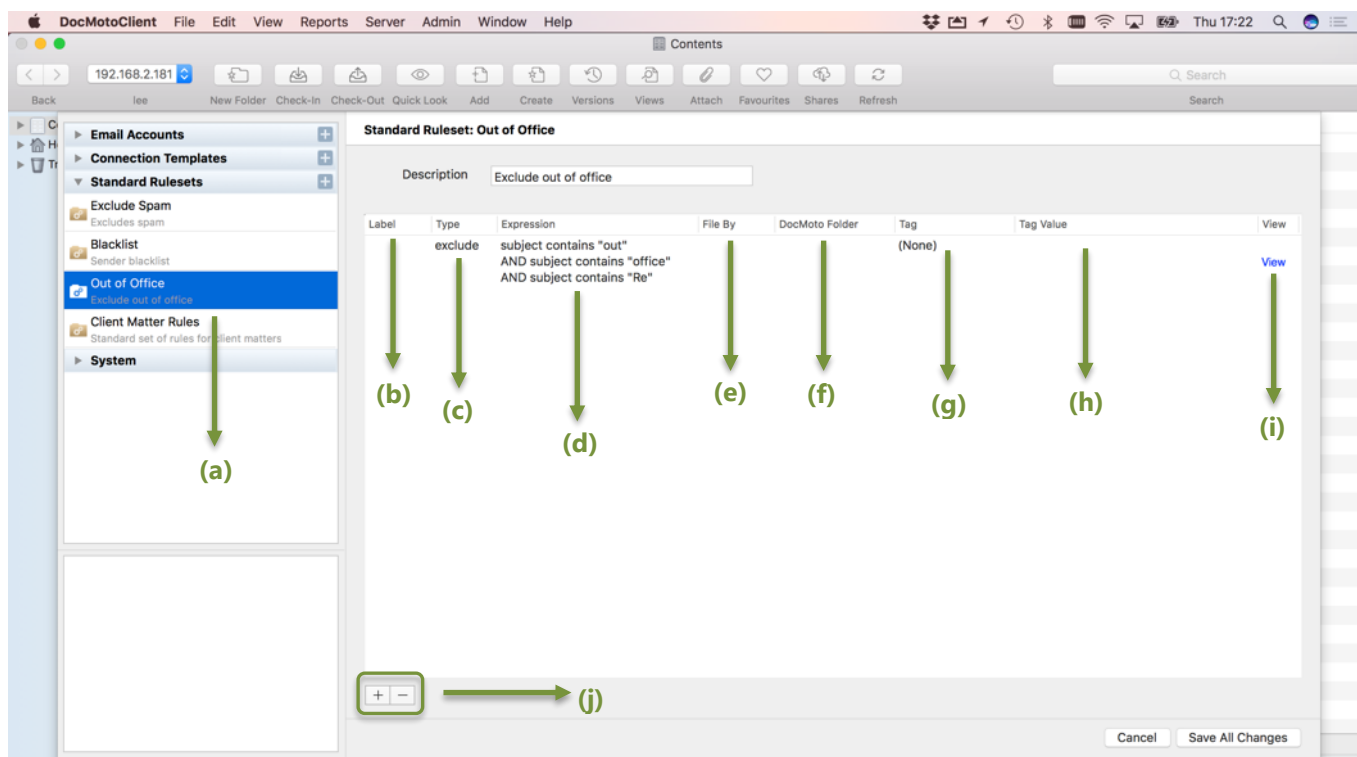
(b) **Project Folders** – IMAP public folders (established through subscription).

Standard Rulesets – Email Import Configuration:

A **Standard Ruleset** is a collection of rules that can be applied to multiple Email accounts. The benefit of using Standard Rulesets is that any amendments made to the ruleset will be automatically applied to all circumstances where the ruleset is used.

Standard Rulesets should be created when rules and multiple rules are to be applied to multiple Email accounts and (or) it is anticipated that rules are likely to require regular modification.

Fig. Standard Rulesets – Out of Office (example):



(a) **Out of Office** – Custom standard ruleset, select to view, edit or add additional conditions.

(b) **Label** – Custom label given to ruleset that can be referred to by other rule sets. In this example, there is none.

(c) **Type** – The type of rule being applied:

- default – the system default.
- include -
- exclude -

(d) **Expression** – The rules stated as an expression.

(e) **File By** – How to file the emails adhering to the rules.

(f) **DocMoto Folder** – The DocMoto folder to store the emails.

(g) **Tag** – The tag to be applied to the imported/filtered emails.

(h) **Tag Value** – The tag value to be applied to the imported/filtered emails.

(i) **View** – Option to view/edit/amend the rules.

(j) + & - To add or remove rules.

Note: Rules are evaluated in order of preference. Rules can be dragged up and down the list.

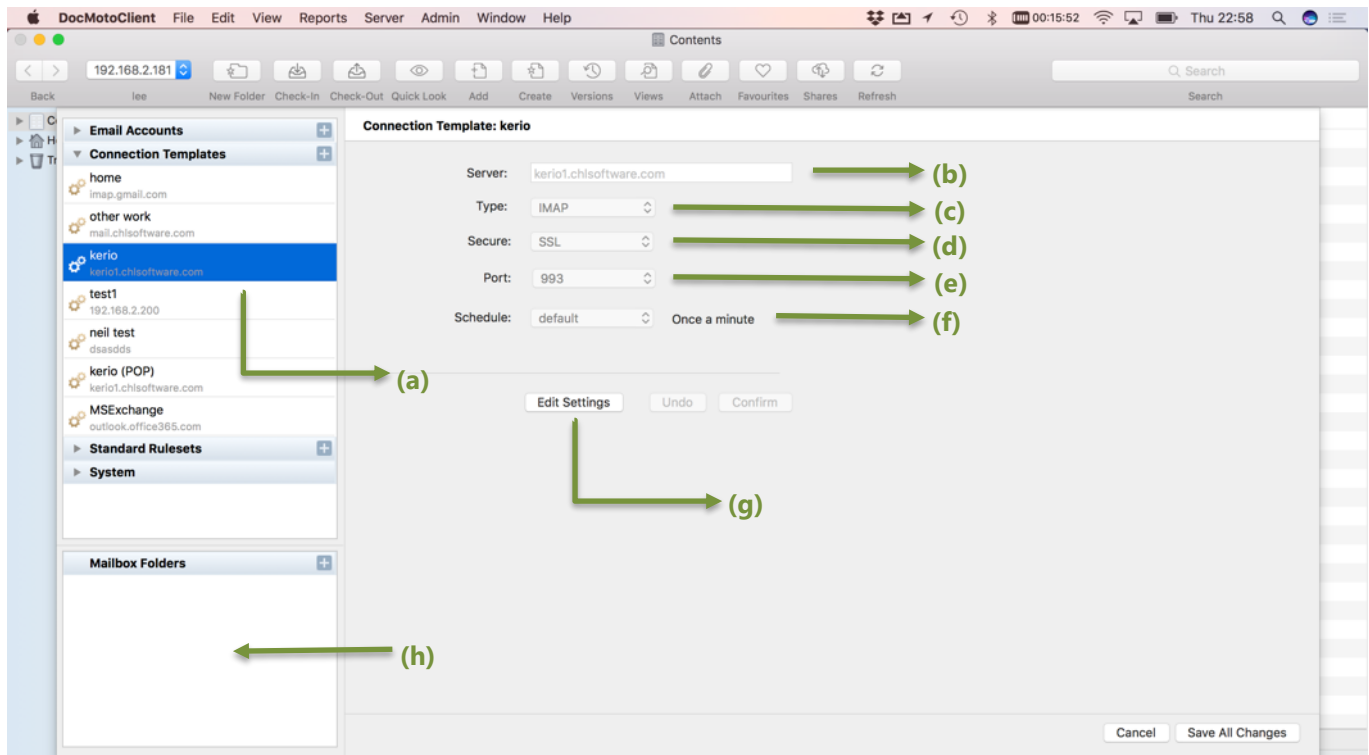
Connection Templates – Email Import Configuration:

Connection Templates allow administrators to save common Email account connection settings and apply them to new Email accounts. This avoids repeatedly having to enter duplicate data as well as removing potential errors when setting up new Email accounts.

By templating the setting values of a connection an administrator can repeatedly create new connections quickly and accurately.

Connection Templates are comprehensive structures that can also contain Mailbox Folder definitions making the addition of Email accounts with sophisticated Mailbox rules simple and easy to administer.

Fig. Connection Templates – kerio (example):

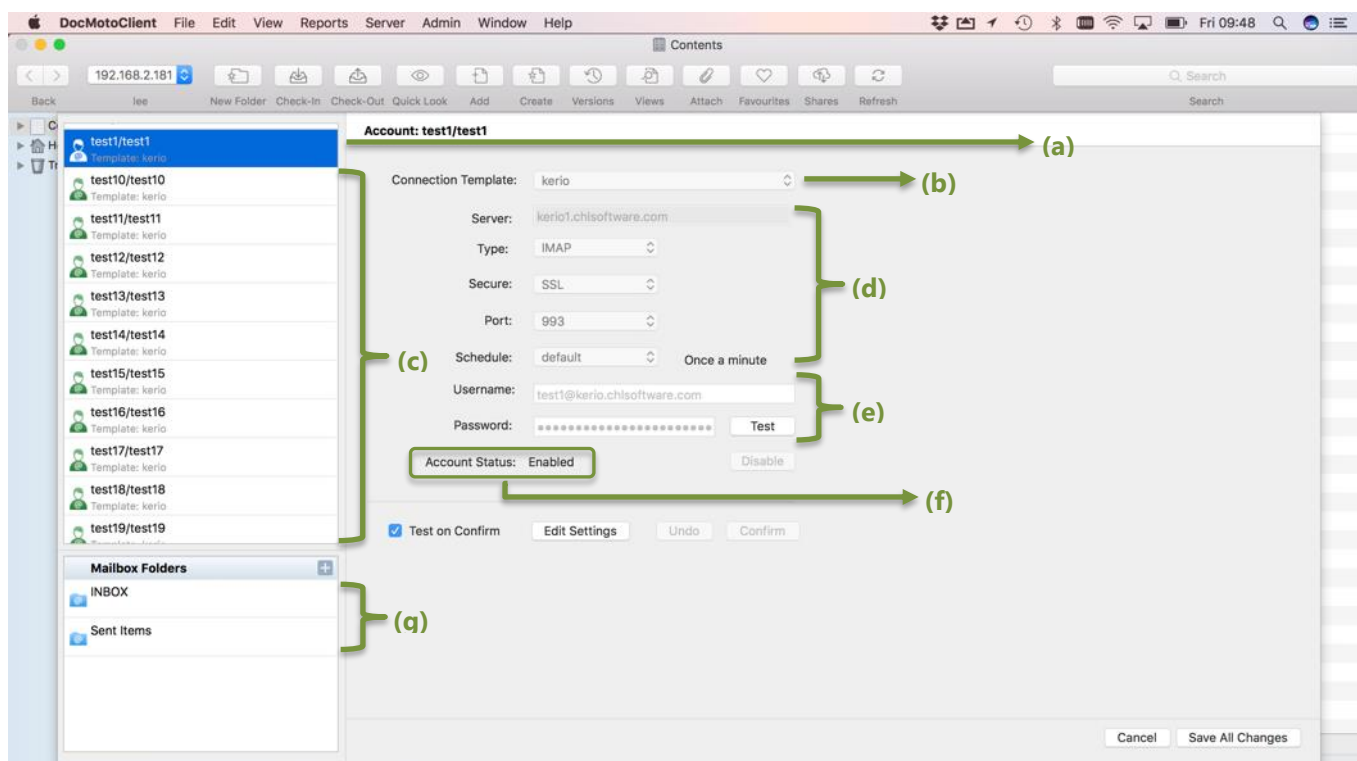


- (a) **kerio** connection template – connection details for kerio mail server.
- (b) **Server:** - email server address.
- (c) **Type:** - type of email service run by the email server. Support available for:
 - IMAP
 - POP3
- (d) **Secure:** - security for the connection to the mail server. Support available for:
 - Non-SSL
 - SSL
- (e) **Port:** - port the email server communicates on.
- (f) **Schedule:** - frequency the email importer application poles the email server.
- (g) **Edit Settings** – select to edit the connection template.
- (h) **Mailbox Folders** – ability to set mailboxes against a connection template.

Email Accounts – Email Import Configuration:

An Email Account is either a POP or IMAP account. The Email Import application supports unlimited email accounts and this includes supporting multiple accounts per user.

Fig. Email Accounts – test1 (example):



- (a) **test1/test1** – user email account.
- (b) **Connection Template** – used to connect email account to email server.
- (c) **Email Accounts** – user email accounts registered and active within Email Import Application.
- (d) **Connection Details** – email server connection details.
- (e) **Username & Password** – for the users email account.
- (f) **Account Status** – of the account selected, in this example the status is enabled.
- (g) **Mailbox Folders** – to monitor.

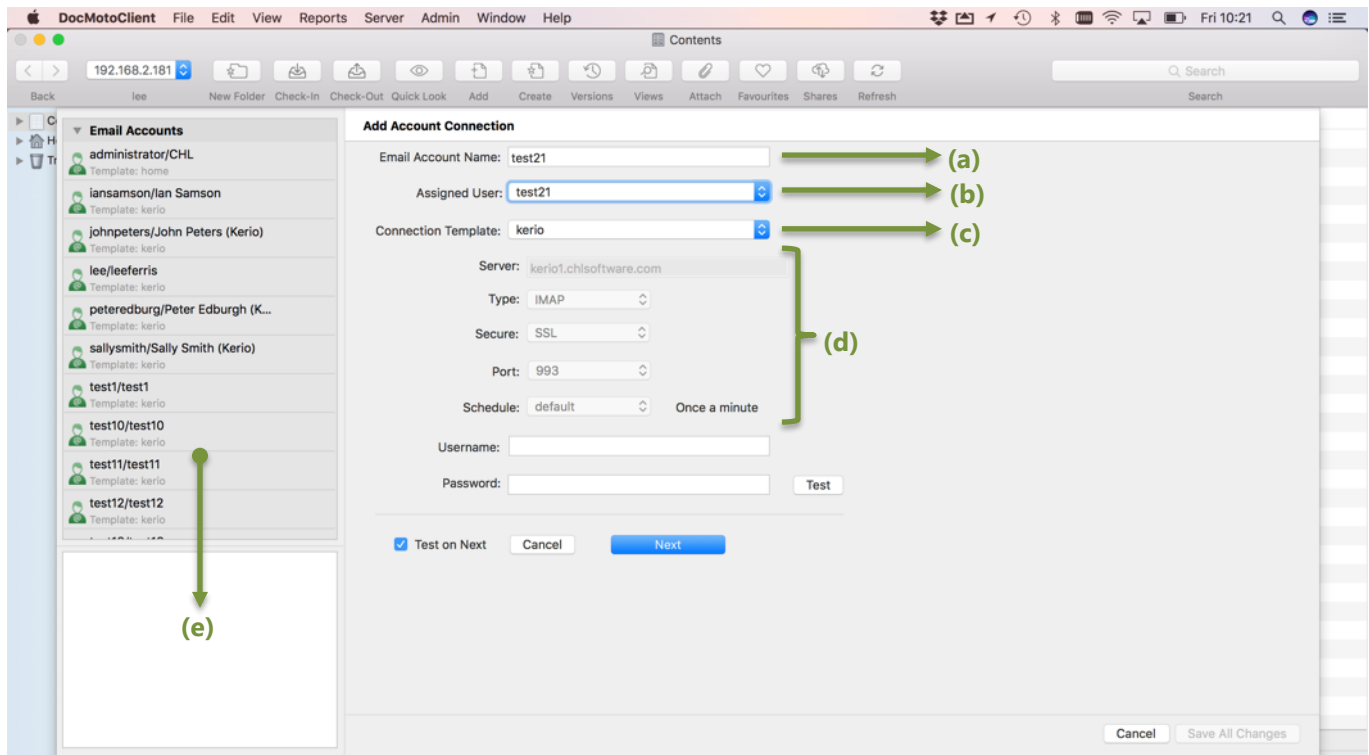
How To:

Add an email account:

This section covers how administrators and users can add an email account into the Email Import Application. The examples assume the **“Email Import Configuration”** option from the **“Admin”** menu has been selected.

1. Select **“Add”** or **“+”** on the **“Email Accounts”** section header (top left-hand corner of user interface). An **“Add Account Connection”** dialog is presented.
2. Enter the details for the users email account. As shown in [Fig. Add Account Connection](#).

Fig. Add Account Connection:

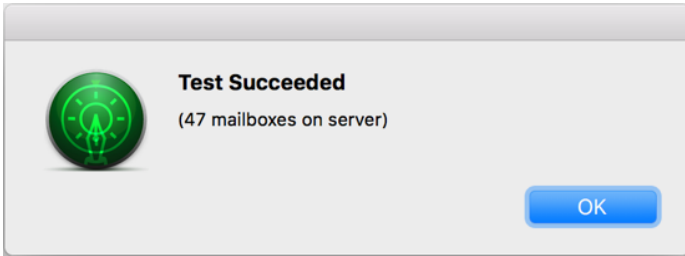


- (a) **Email Account Name:** – name assigned to the user’s email account details.
- (b) **Assigned User:** - DocMoto user assigned to account details.
- (c) **Connection Template:** - template connection used.
- (d) **Connection Details:** - details of the connection, stipulated by the connection template.
- (e) **Email Accounts:** - whilst in edit mode not selectable.

At this stage, the Username & Password has not been entered. This section assumes the administrator knows the user’s credentials, there is a [supplementary section](#) explaining the process if the administrator does not have the user’s credentials.

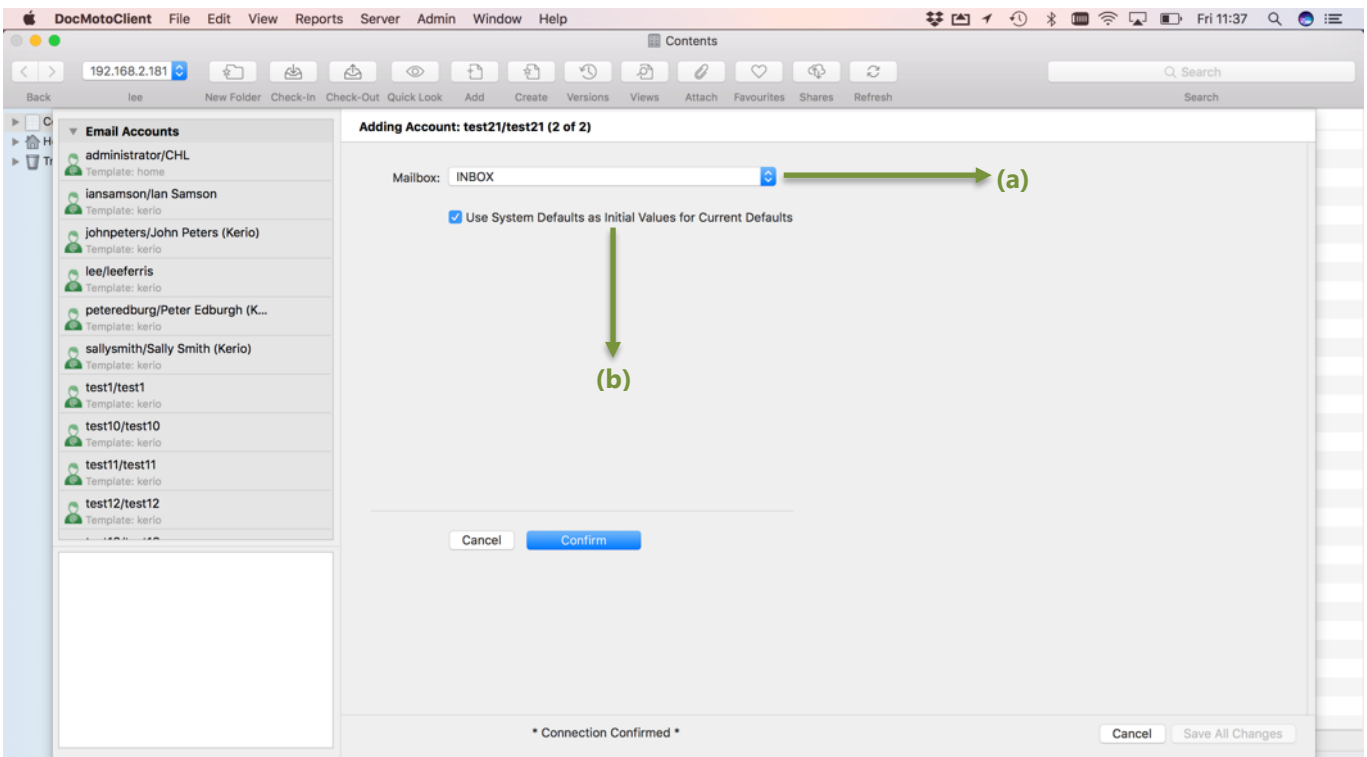
3. Enter the Username & Password for the user’s email account. The details can be tested by selecting **“Test”**. The system confirms the connection. See [Fig. Test Succeeded](#).

Fig. Test Succeeded:



4. Select **"Next"** to move forward. An Adding Account: <username>/<user connection> (2 of 2) dialog is presented. Select a Mailbox to monitor from the **"Mailbox"** list. All mailboxes available for this account and system patterns are listed. In this example, the administrator selected the **"INBOX"** mailbox. See [Fig. Adding Account: <username>/<user connection> \(2 of 2\)](#).

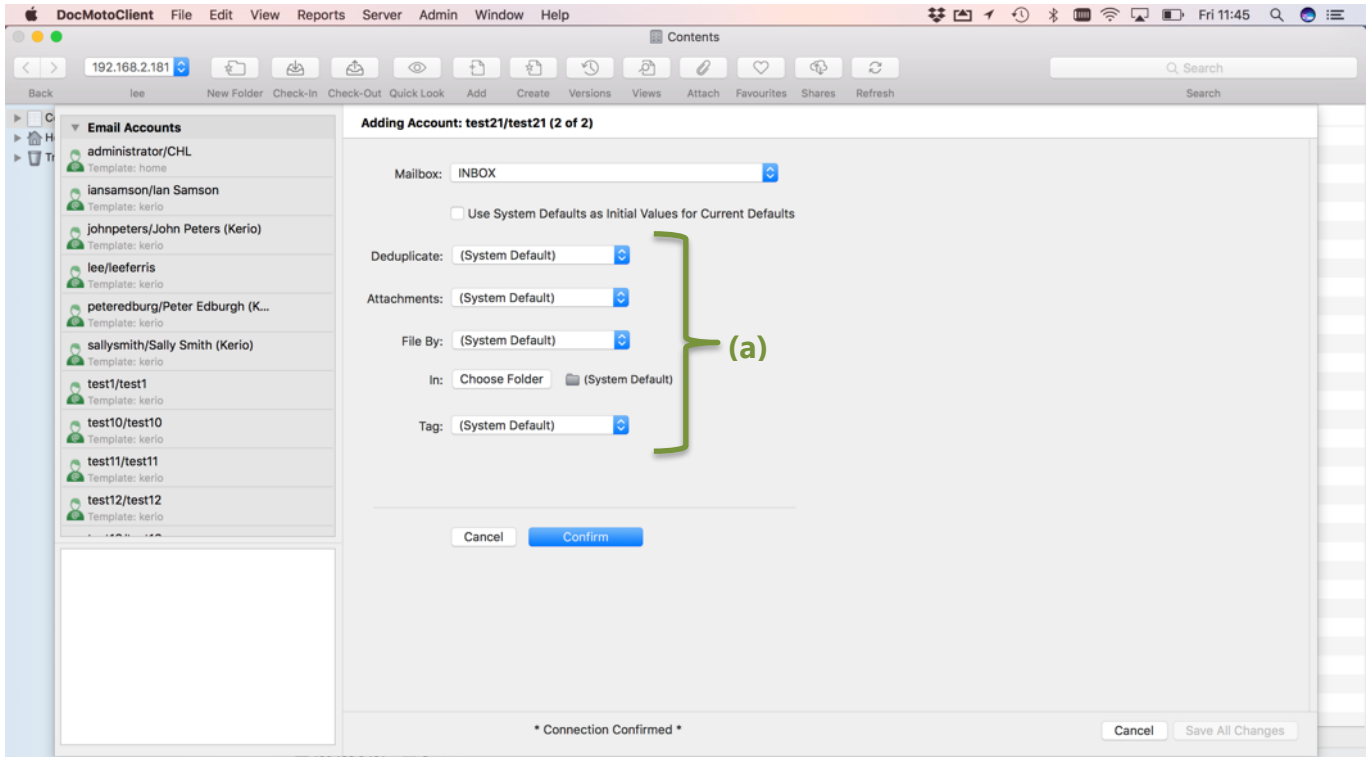
Fig. Adding Account: <username>/<user connection> (2 of 2):



(a) Mailbox: - to monitor.

(b) User System Defaults as Initial Values for Current Defaults – If left selected the system defaults are used for this connection. If the administrator deselects then the following options are available – please refer to [Fig. Non-System Defaults as Initial Values for Current Defaults](#).

Fig. Non-System Defaults as Initial Values for Current Defaults:



(a) System Defaults: - as set by the administrator:

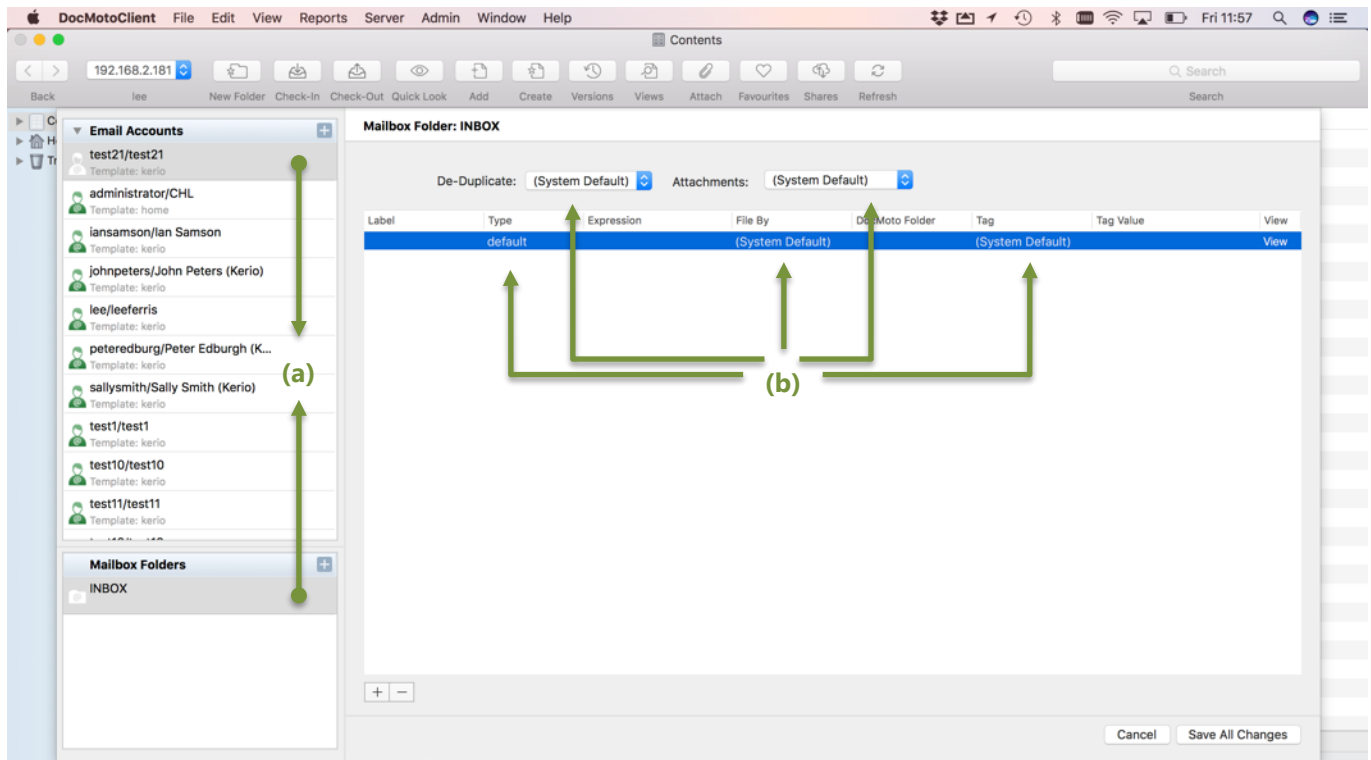
- De-duplicate
- Attachments
- File By
- In
- Tag

Note: Refer to [Fig. System - Defaults](#) for more info.

In this example, the administrator has the **User System Defaults as Initial Values for Current Defaults** checked.

5. Select **“Confirm”**. The user’s email account is registered with the accompanying mailbox and the system defaults applied. See [Fig. Email Account Registered](#).

Fig. Email Account Registered:



(a) **test21/test21** – email account and INBOX registered.

(b) **System Defaults** – applied as initial entry.

Note: At this stage, the administrator can create additional rules against this user's mailbox. This functionality is covered later in this document.

6. Select **"Save Changes"** to confirm all.

Add an email account (supplementary section):

As mentioned in the section [Add an email account](#), it is possible to enable users to either create and register their own email accounts or enable them to enter the password for their account. The Email Import Application has two configuration files which allow administrators to enable this functionality.

To view/check the configuration files:

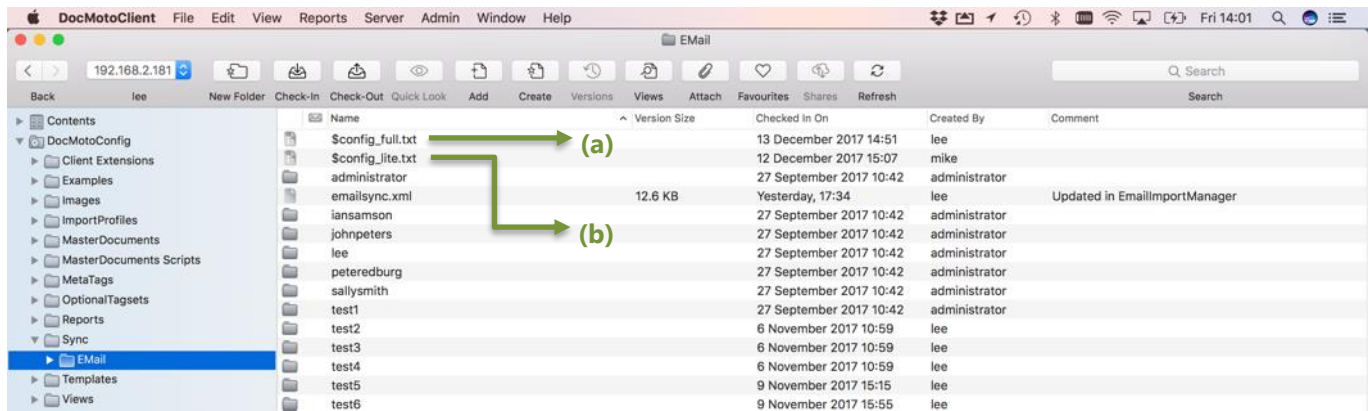
1. Select **"Show Admin Folders"** from the **"Admin"** menu.
2. Navigate to the **"DocMotoConfig/Sync/Email/"** folder.

Two configuration files can be found in the **"DocMotoConfig/Sync/Email/"** folder, namely:

1. \$config_full.txt
2. \$config_lite.txt

See [Fig. Email Import Application – Configuration Files](#):

Fig. Email Import Application – Configuration Files:



(a) **\$config_full.txt** – If the security & permissions are not changed on this file, users have the ability to create/edit their own email account(s) and mailbox rules. If the security & permissions are set to **“No Access”** users will NOT have the ability to create/edit their own email account(s) and mailbox rules.

(b) **\$config_lite.txt** – If the security & permissions are not changed on this file, users have the ability to set their own passwords against their email account(s). If the security & permissions are set to **“No Access”** users will NOT have the ability to set their own passwords against their email account(s).

This section covers both scenarios, initially we deal with users having full rights i.e. create/edit their own email account(s) and mailbox rules.

Add an email account (as user):

This example assumes the user is logged into the DocMoto system.

1. Select **“Email Import Configuration”** from the **“Admin”** menu. An email accounts dialog is presented to the user.
2. Select **“Add”** or **“+”** on the **“Email Accounts”** section header (top left-hand corner of user interface). An **“Add Account Connection”** dialog is presented. See [Fig. Add Account Connection \(as user\)](#):
3. Enter Username & Password for the user’s email account. The details are tested by selecting **“Test”**. The system confirms the connection. See [Fig. Test Succeeded \(as user\)](#).

Fig. Test Succeeded (as user):

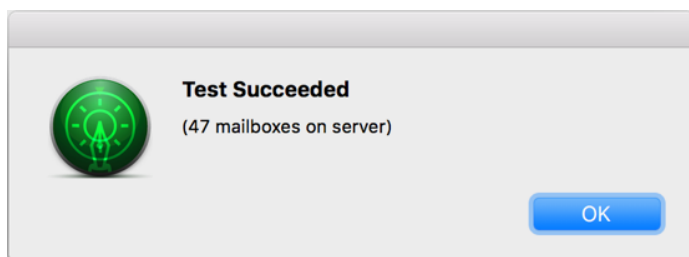
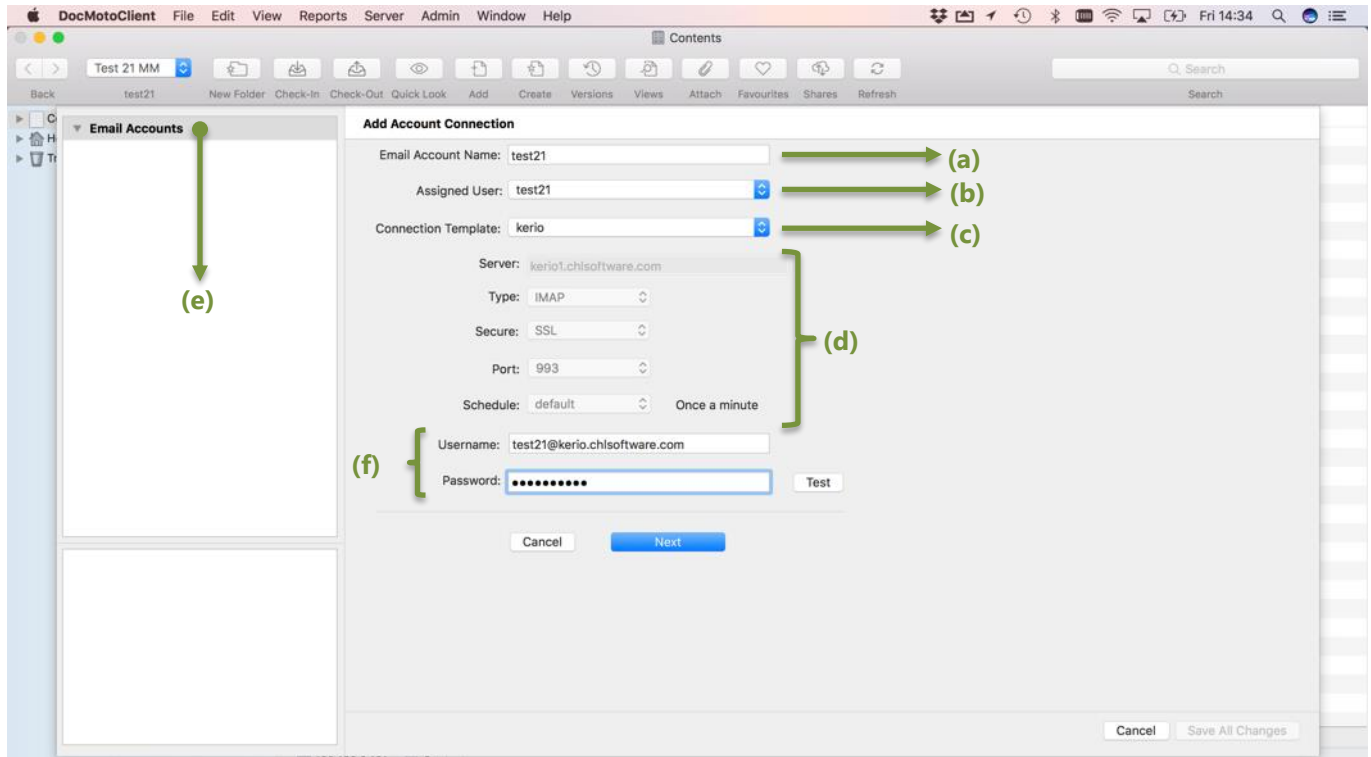


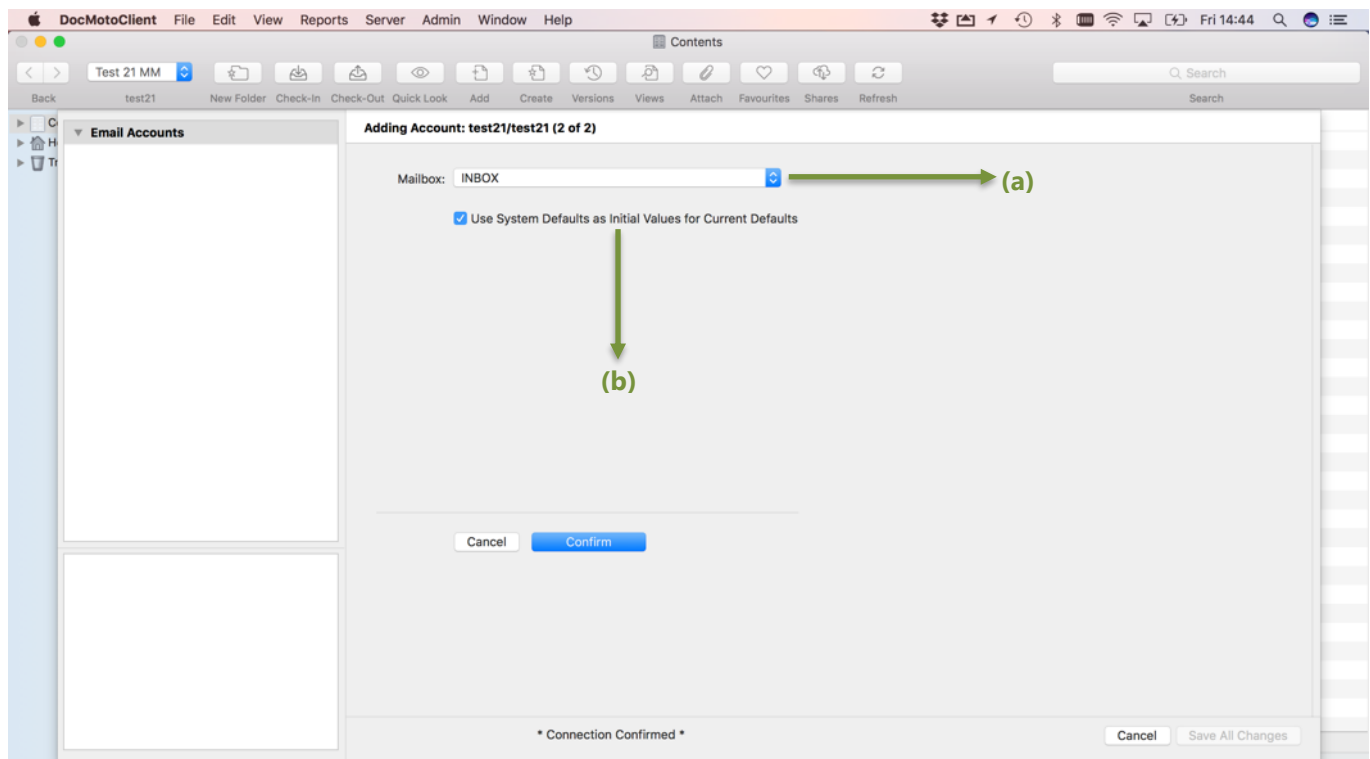
Fig. Add Account Connection (as user):



- (a) **Email Account Name:** – name assigned to the user’s email account details.
- (b) **Assigned User:** - DocMoto user assigned to account details.
- (c) **Connection Template:** - template connection used.
- (d) **Connection Details:** - details of the connection, stipulated by the connection template.
- (e) **Email Accounts:** - No accounts registered.
- (f) **User Credentials:** - Username & Password for email account.

4. Select **“Next”** to move forward. An Adding Account: <username>/<user connection> (2 of 2) dialog is presented. Select a Mailbox to monitor from the **“Mailbox”** list. All mailboxes available for this account and system patterns are listed. In this example, the administrator selected the **“INBOX”** mailbox. See [Fig. Adding Account: <username>/<user connection> \(2 of 2\) \(as user\).](#)

Fig. Adding Account: <username>/<user connection> (2 of 2) (as user).

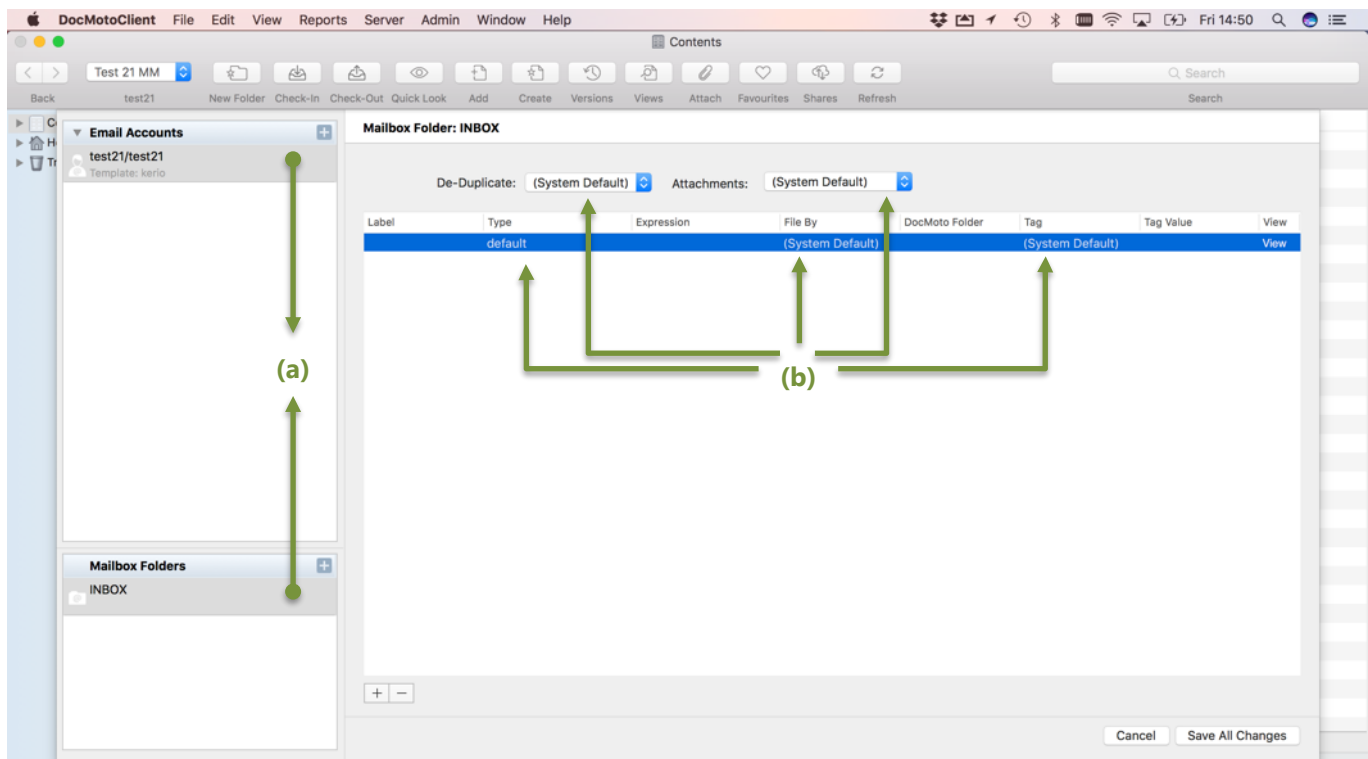


(a) Mailbox: - to monitor.

(b) User System Defaults as Initial Values for Current Defaults – If left selected the system defaults are used for this connection. If the user deselects, the following options are available – please refer to [Fig. Non-System Defaults as Initial Values for Current Defaults](#) (for more info).

5. Select **“Confirm”**. The user’s email account is registered with the accompanying mailbox and the system defaults applied. See [Fig. Email Account Registered \(as user\)](#).

Fig. Email Account Registered (as user):



(a) **test21/test21** – email account and INBOX registered.

(b) **System Defaults** – applied as initial entry.

Note: At this stage, the user can create additional rules against this user’s mailbox. This functionality is covered later in this document.

6. Select **“Save Changes”** to confirm all.

Setting the password for an email account (as user):

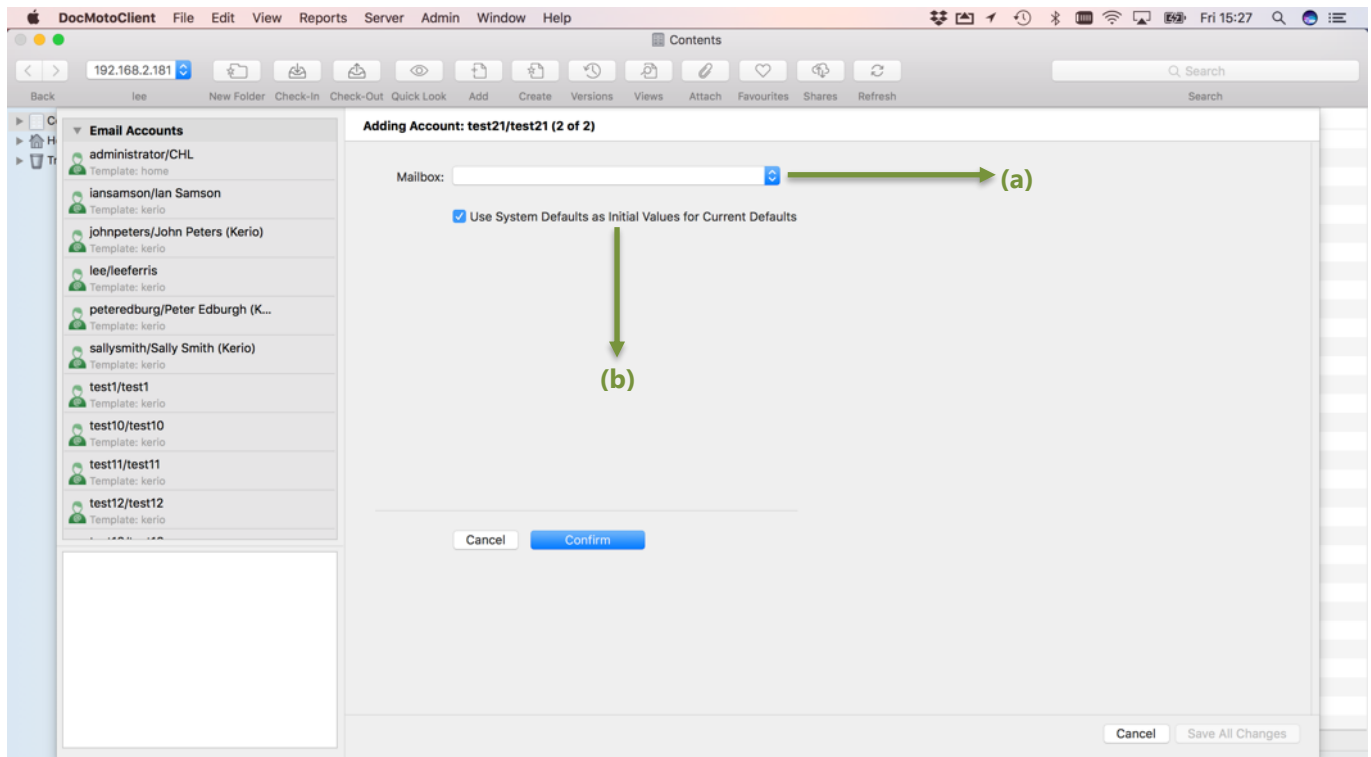
The next section covers users setting their passwords for their email accounts registered by an administrator. **Note:** The administrator must set the configuration to support this functionality – refer to [Fig. Email Import Application – Configuration Files](#):

Stage one of this process is identical to [Add an Email Account](#) – steps 1 & 2 (including [Fig. Add Account Connection](#)). Instead of entering the user’s credentials (username & password) for the email account:

1. Deselect **“Test on Next”** checkbox and select **“Next”**. An Adding Account <username>/<user connection> (2 of 2) dialog is presented. See [Fig. Adding Account <username>/<user connection> \(2 of 2\) Pwd.](#)

Note: If a mailbox has been associated to the connection template used to mount the user’s email account, the mailbox (INBOX for example) is automatically selected – in the mailbox list. In this example, no mailbox has been associated to the connection template used to mount the user’s email account.

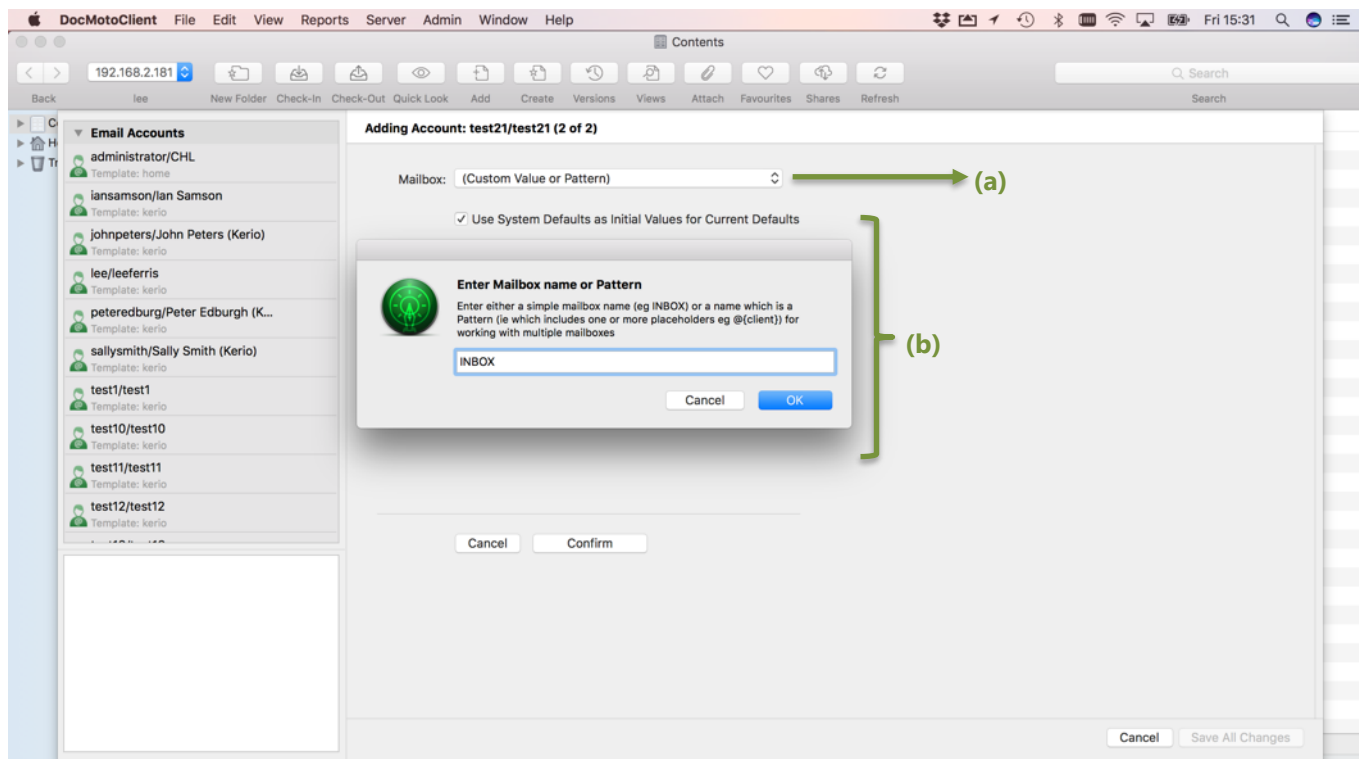
Fig. Adding Account <username>/<user connection> (2 of 2) Pwd:



(a) **Mailbox:** - In this example no mailbox is registered as the connection template used does not have one defined.
(b) **User System Defaults as Initial Values for Current Defaults** – If left selected the system defaults are used for this connection. If the user deselects the following options are available – please refer to [Fig. Non-System Defaults as Initial Values for Current Defaults](#) (for more info).

2. Select “**(Custom Value or Pattern)**” from the “**Mailbox:**” list. A dialog is presented enabling the administrator to enter the name of the mailbox. In this example, the administrator choses **INBOX**. See [Fig. Custom Value or Pattern](#).
3. Select “**OK**” to confirm. The **INBOX** is registered as the mailbox to monitor.

Fig. Custom Value or Pattern:

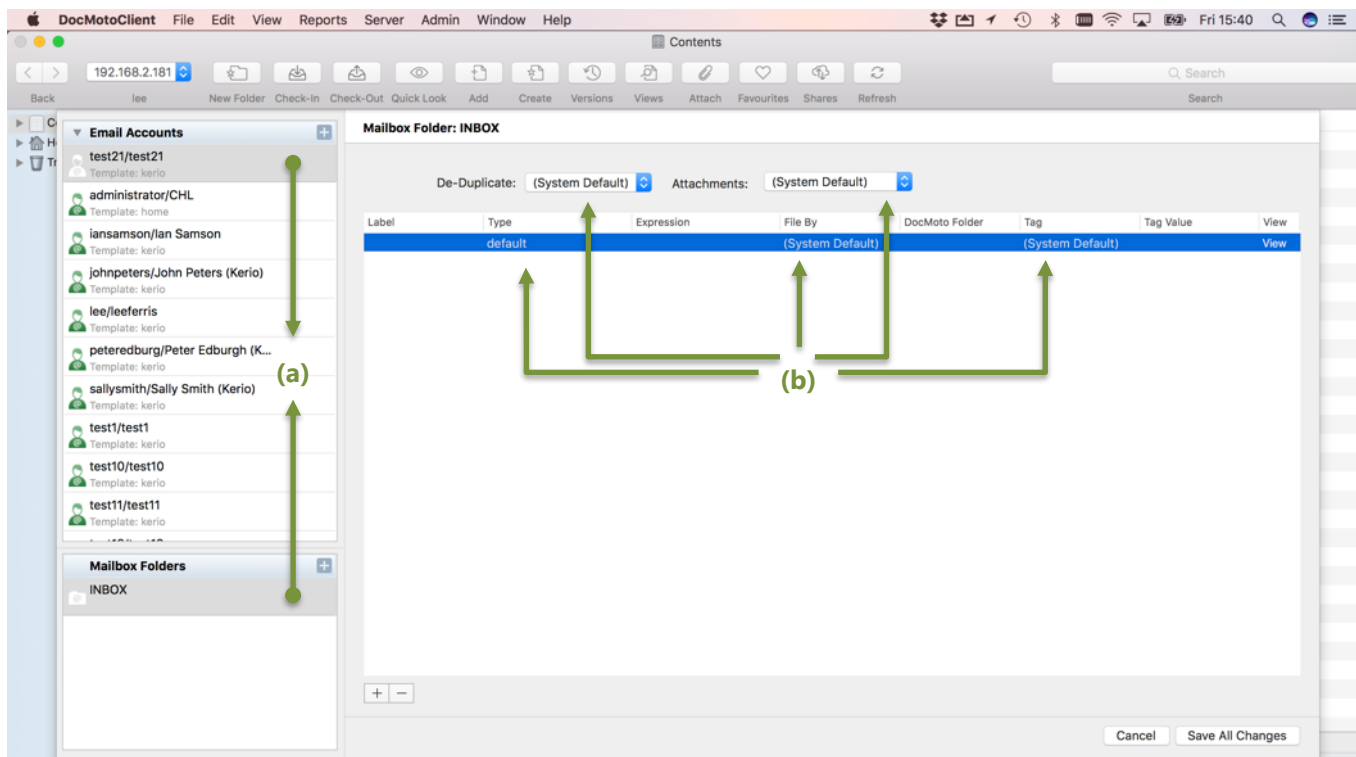


(a) Mailbox: - Set to (Custom Value or Pattern) to enable administrator to associate a mailbox to monitor for this account.

(b) Enter Mailbox name or Pattern: - Set to **INBOX**.

4. Select **“Confirm”**. The user’s email account is registered with the accompanying mailbox and system defaults applied. See [Fig. Email Account Registered \(password not set\)](#).

Fig. Email Account Registered (password not set):



- (a) **test21/test21** – email account and INBOX registered.
- (b) **System Defaults** – applied as initial entry.

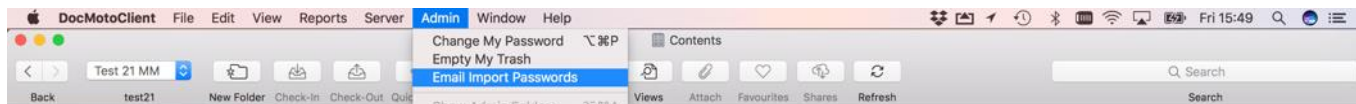
At this stage, the user’s email account and mailbox (INBOX) are registered but the account is not fully active until the user enters their credentials.

User completes process by entering their credentials:

This section assumes the user is logged into the DocMoto system.

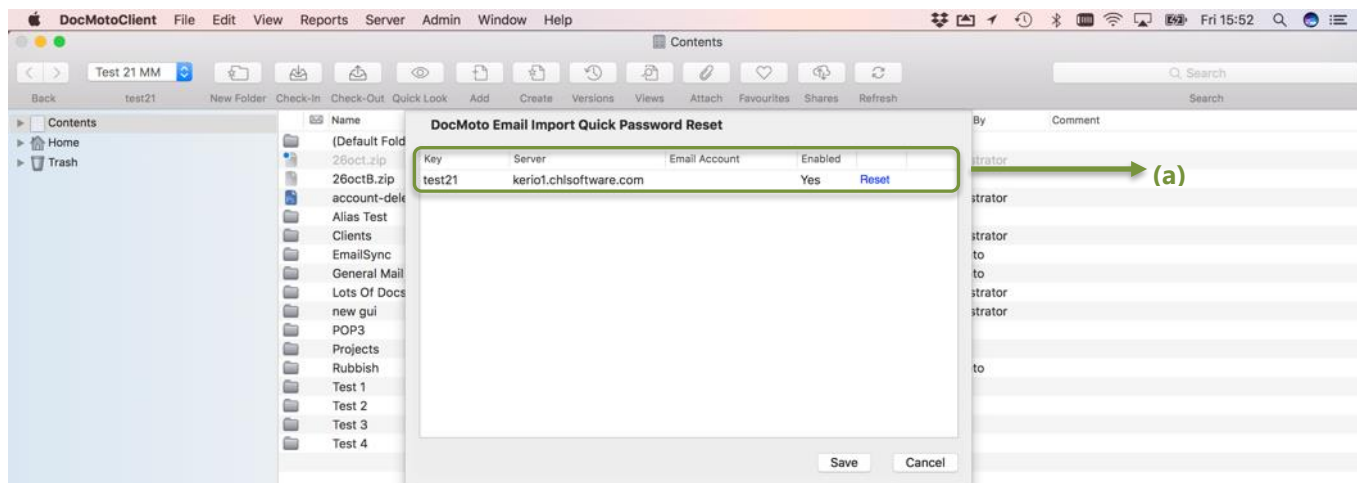
1. Select **“Email Import Password”** option from the **“Admin”** menu. See [Fig. Email Import Password – Menu Item](#).

Email Import Password – Menu Item:



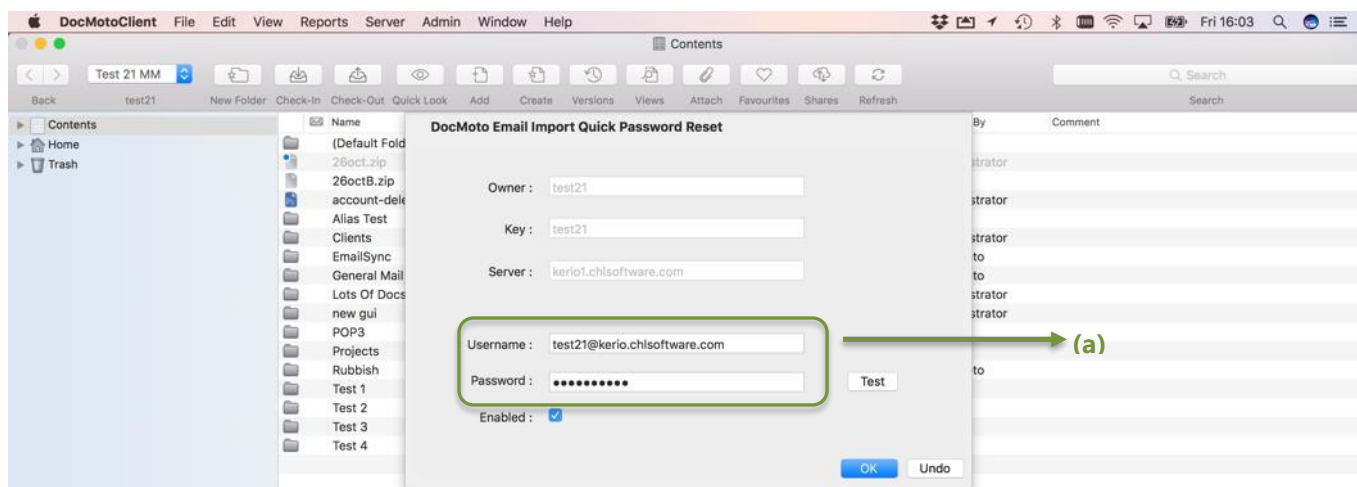
2. A DocMoto Email Import Quick Password Reset dialog is presented with the user’s details. See [Fig. Email Import Password – dialog](#).
3. Click on the **“Reset”** option (top right-hand side of dialog). A dialog is presented enabling the user to fill in the blanks (Username and/or Password). In this example, both items are required.
4. Enter username & password and select **“Test”** to check details. See [Fig. Email Import Password – dialog 2](#).
5. Select **“Test”** to check details. The system confirms the connection. See [Fig. Test Succeeded \(password reset\)](#).

Fig. Email Import Password – dialog:



(a) Email account details with option to reset.

Fig. Email Import Password – dialog 2:



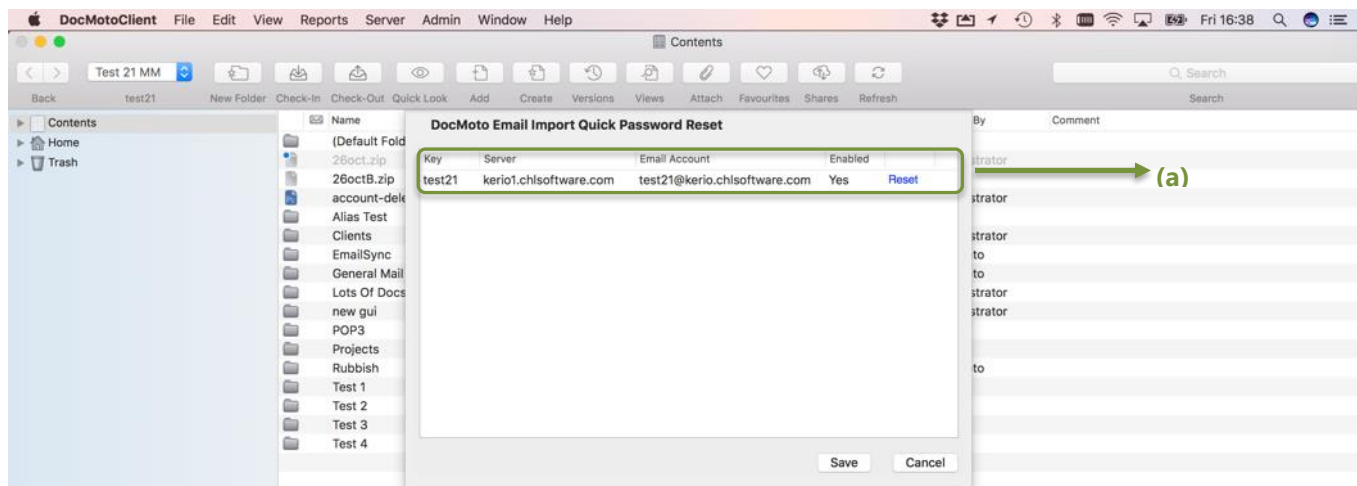
(a) User credentials – username & password.

Fig. Test Succeeded (password reset):



6. Select **“OK”** to confirm the test results. Select **“OK”** to confirm the user credentials. The user is presented with the initial Email Import Password dialog with the credentials listed (complete). See [Fig. Email Import Password dialog 3](#).
7. Select **“Save”** to complete the process.

Fig. Email Import Password – dialog 3:



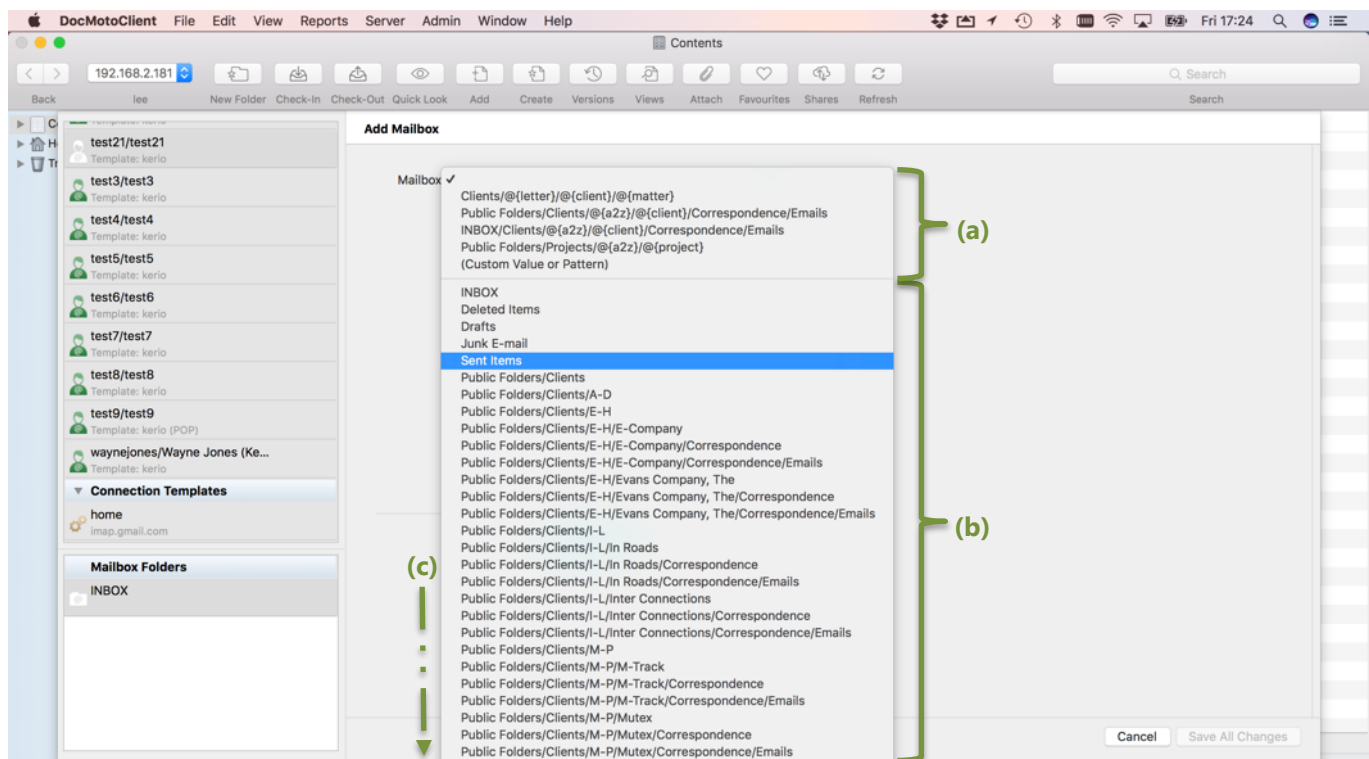
(a) User credentials complete – account registered.

Add additional mailboxes to a user's email account:

This section covers how administrators and users can add additional mailboxes to a user's email. The examples assume the **"Email Import Configuration"** option from the **"Admin"** menu is already selected.

1. Select the user's email account from the **"Email Accounts"** section (top left-hand corner of interface). The mailbox folders for this account are listed under the **"Mailbox Folders"** section (bottom left-hand corner of interface).
2. Select either the **"Add"** or **"+"** option on the **"Mailbox Folders"** section header. An Add Mailbox dialog is presented
3. Select the Mailbox from the **"Mailbox"** list. [See Fig. Mailbox List](#). In this example, the administrator has selected **"Sent Items"** as the additional mailbox.

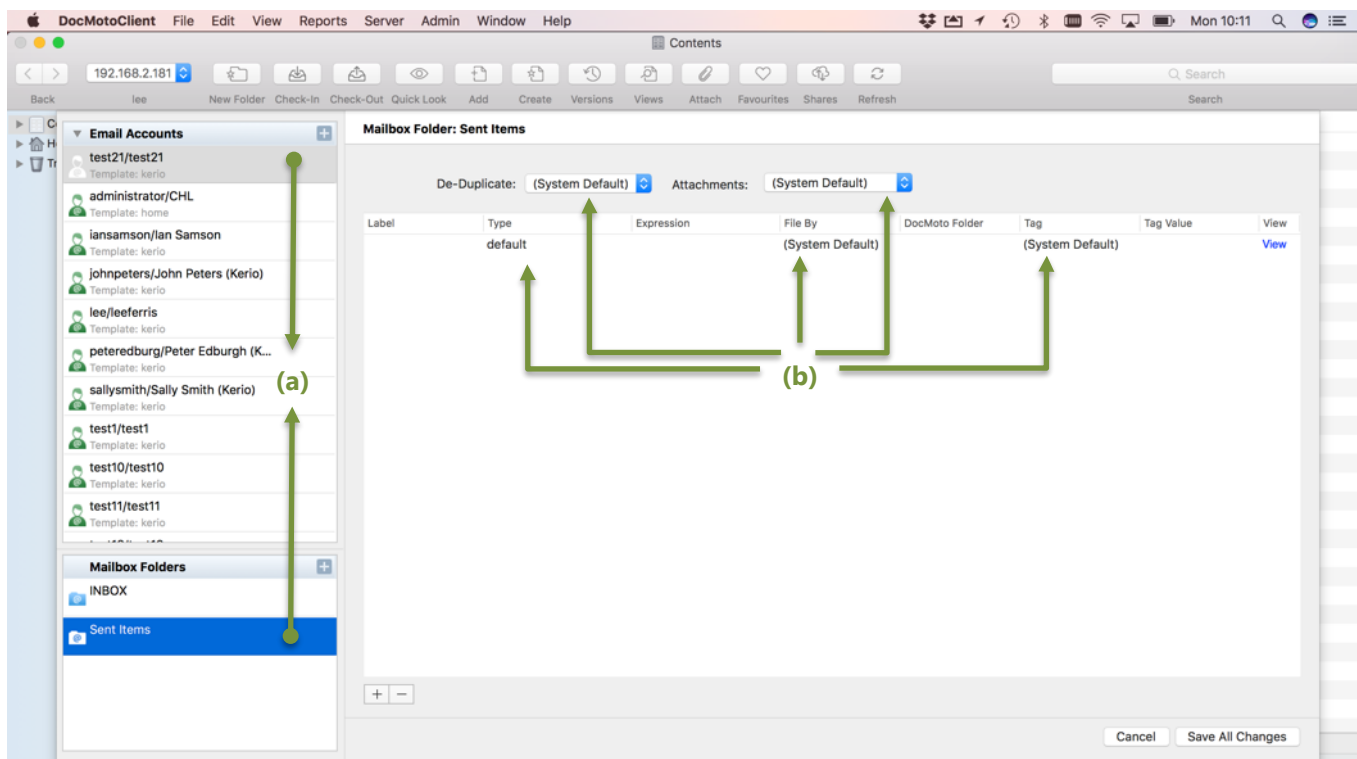
Fig. Mailbox List:



- (a) Custom mailbox patterns – defined by the administrator.
- (b) Mailboxes – as listed by the IMAP server.
- (c) Further mailbox listings available.

4. Select **"Confirm"**. The user's **"Sent Items"** mailbox will be added to the user's email account and the system defaults applied. See Fig. Sent Items mailbox added to user's email account.

Fig. Sent Items mailbox added to user's email account:



- (a) **test21/test21** – email account and Sent Items registered.
- (b) **System Defaults** – applied as initial entry.

5. Select **“Save All Changes”** to confirm and save.

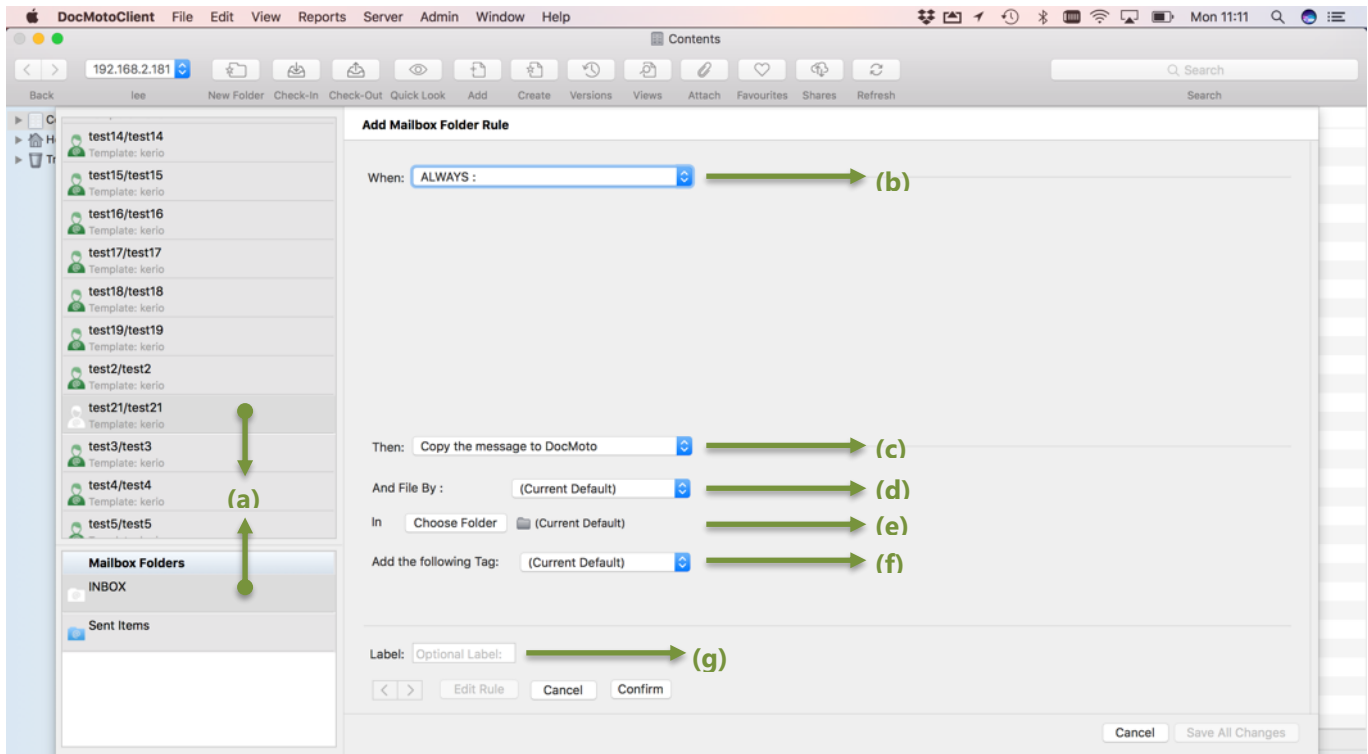
Note: If the user has been given permission to administer their own email account the process for adding additional mailboxes is exactly the same as above.

Adding a mailbox folder rule:

This section will cover how administrators and users can add a mailbox folder rule. The examples assume the “**Email Import Configuration**” option from the “**Admin**” menu is selected.

1. Select the user’s email account from the “**Email Accounts**” section.
2. Select the user’s mailbox to apply a ruleset. In this example, the INBOX mailbox folder.
3. Select “+” (bottom left-hand corner of interface) to add a mailbox folder rule. An **Add Mailbox Folder Rule** interface is presented. See Fig. Add Mailbox Folder Rule.

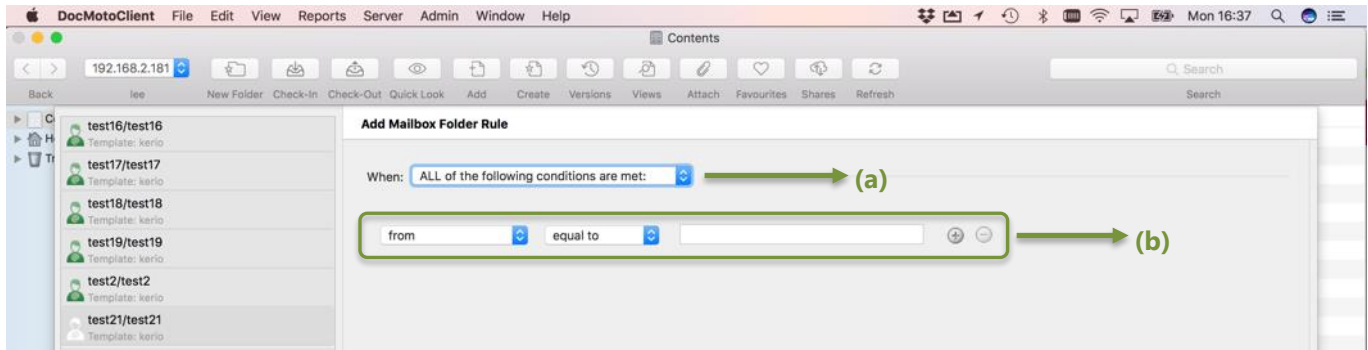
Add Mailbox Folder Rule:



- (a) **INBOX** –applying a mailbox folder rule to test21’s INBOX (mail folder).
- (b) **When:** - the conditions when to apply the rule(s). Conditions as follows:
- Always:
 - ALL of the following conditions are met:
 - ANY of the following conditions are met:
- (c) **Then:** - the actions to take when a rule is adhered too. Actions as follows:
- Copy the message to DocMoto
 - Skip over the message
 - Goto label of another rule
 - - Evaluate a Set of Standard Rules
 - Default values for Subsequent Rules
- (d) **And File By:** - how to file the email(s) that adhere to the rule(s). File By as follows:
- None
 - By Date
 - By From User Domain
 - By From User
- (e) **In:** - the folder in DocMoto to store the email(s).
- (f) **Add the following Tag:** - tags to apply to the imported email(s).
- (g) **Label:** - for other rules to potentially call by.

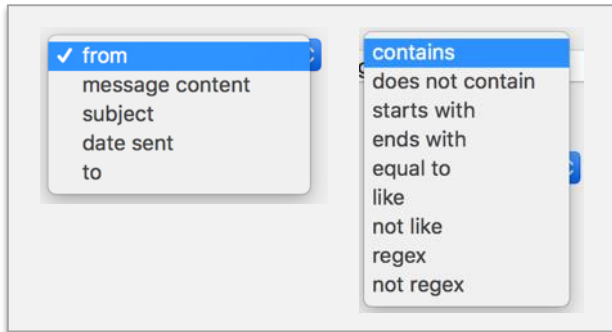
- Select the condition when to apply the rule(s). In this example, “**When: ALL of the following conditions are met**”. The first line of the conditions becomes available. See [Fig. Add Mailbox Folder Rule – First Condition](#).

Fig. Add Mailbox Folder Rule – First Condition:

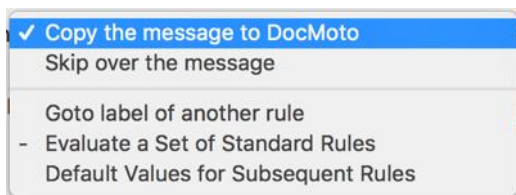


- Conditions to apply** – When ALL of the following conditions are met (AND condition).
- First conditional line** available with + key to add more conditions.

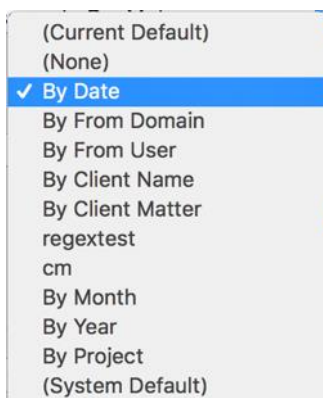
- Select the conditions for the rule. In this example, the administrator has chosen the **Subject equal to** “automatic email import”. Administrators can choose from the following conditions:



- Select from the **Then:** list box what to do with the email, if it adheres to the rule. In this example, the administrator has chosen to **Copy the message to DocMoto**. Administrators can choose from the following actions:



- Select from the **And File By:** list box how to file the email, if it adheres to the rule. In this example, the administrator has chosen **By Date**. Administrators can choose from the following file by methods:

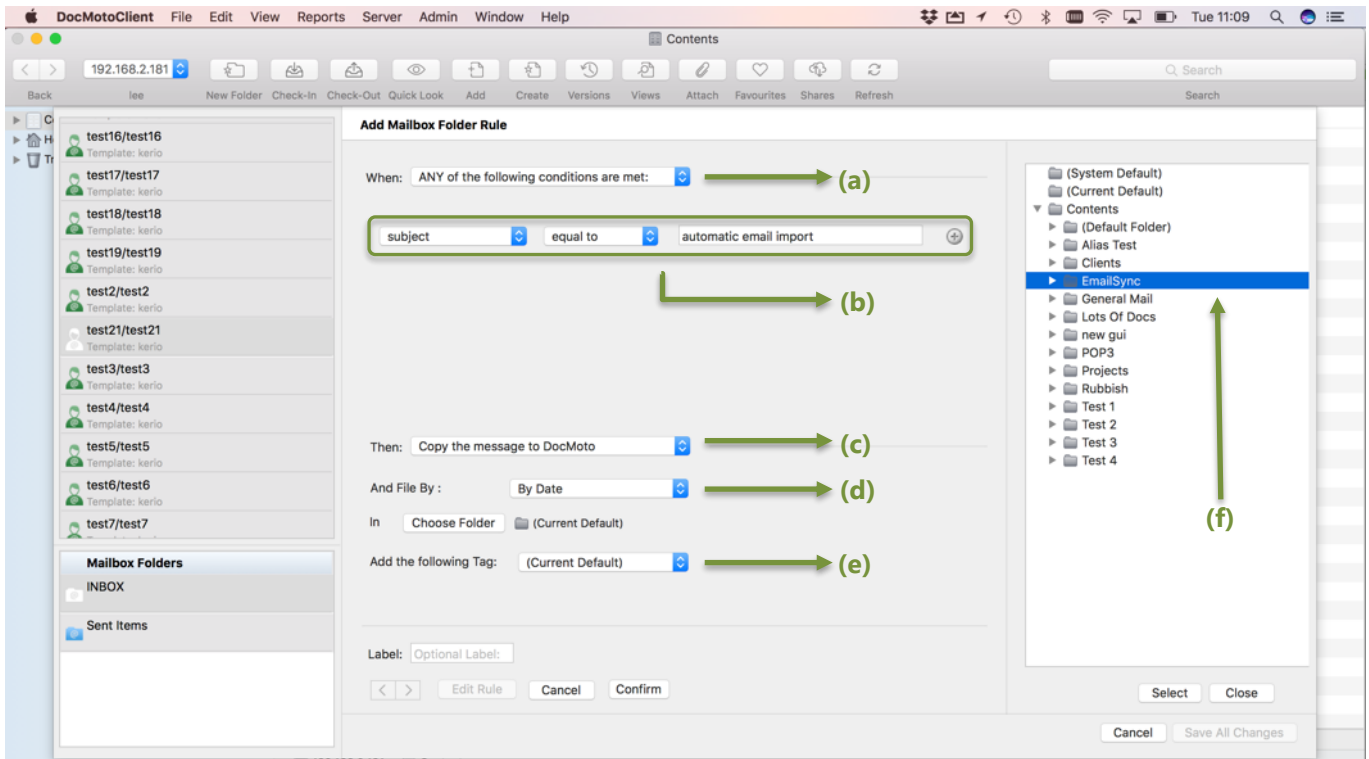


Note: The following **File By** actions are custom:

- By Client Name
- By Client Matter
- cm
- By Project

- Select the folder (to file the email(s) that adhere to the rule) by selecting **“Choose Folder”**. **Note:** If no folder is selected the email(s) will be filed into the default folder. On selection of **“Choose Folder”** the administrator is presented with DocMoto’s repository. In this example, the **“EmailSync”** folder is chosen. See [Fig. DocMoto repository](#).

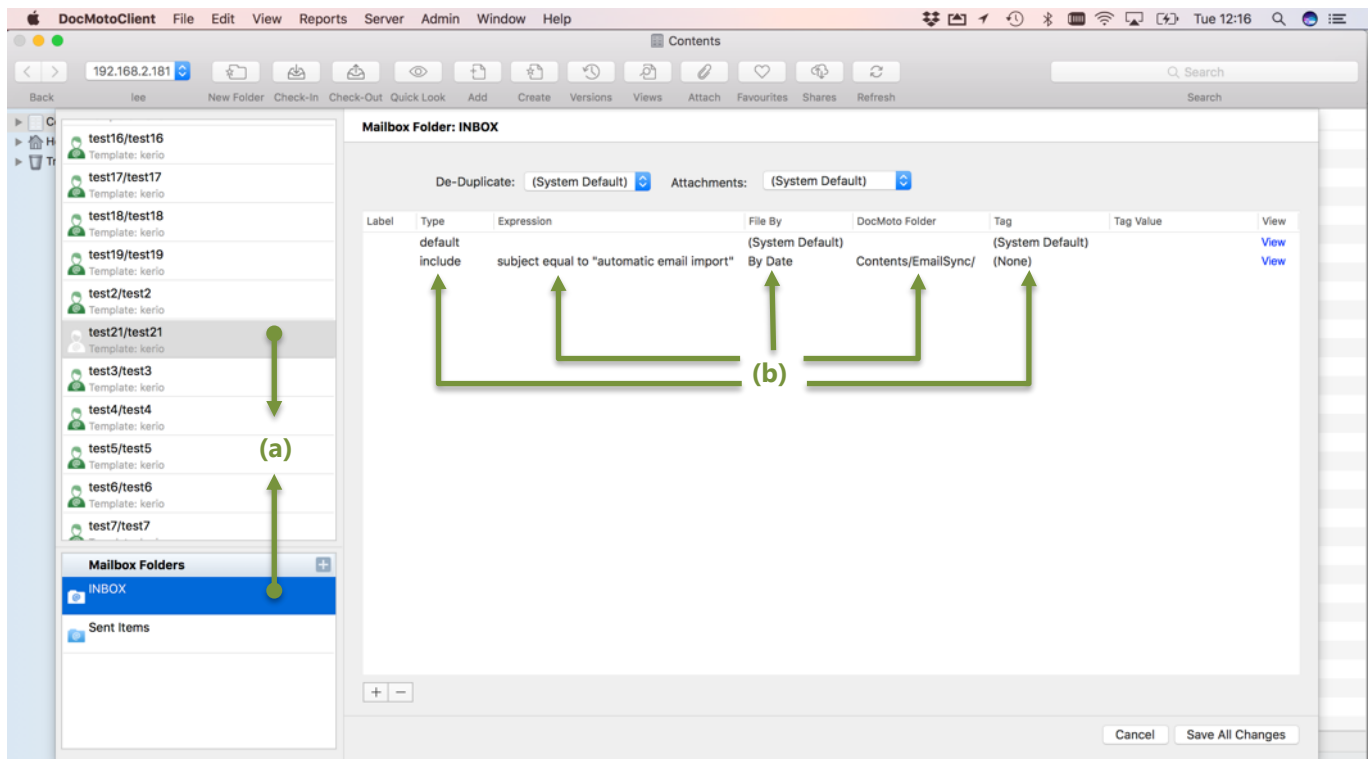
Fig. DocMoto repository:



- (a) **Conditions to apply** – When ALL of the following conditions are met (AND condition).
- (b) **Condition(s)** – the condition(s)/rule(s) to be applied. In this example, if the **Subject** of the email is **equal to** “automatic email import”.
- (c) **Then:** - the actions to take when a rule is adhered too. In this example, **Copy the message to DocMoto**.
- (d) **And File By:** - how to file the email(s) that adhere to the rule(s). In this example, **By Date**.
- (e) **Add the following Tag:** - tags to apply to the imported email(s). In this example, the default tag will be applied.
- (f) **DocMoto Folder:** - the DocMoto folder to import the email(s) that adhere to the rule.

- Select **“Select”** once the folder to import the emails into is selected. The interface confirms the folder by listing it next to the **In – Choose Folder** listing.
- Select **“Confirm”**. The rule will be added to the user’s **INBOX** - mailbox folder. See [Fig. INBOX – mailbox folder rule](#).

Fig. INBOX – mailbox folder rule:



- (a) test21/test21 – INBOX – mailbox folder.
- (b) Rule – The new created rule.

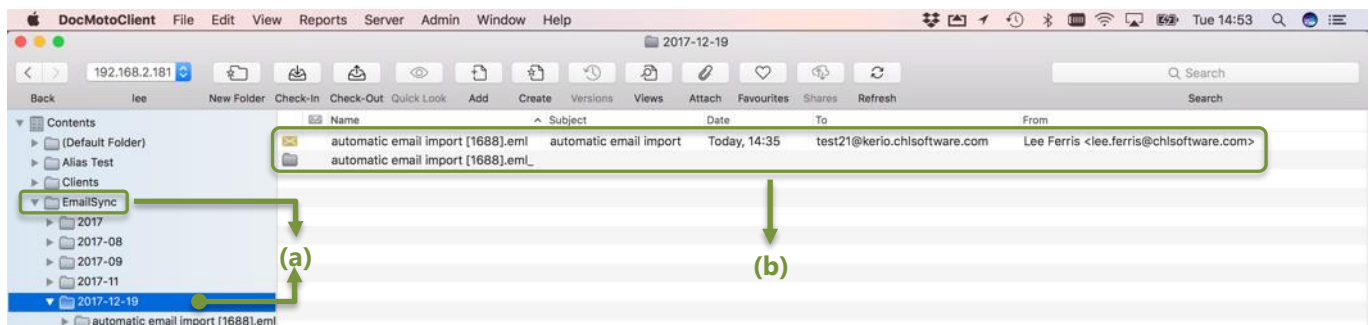
Note: Rules are listed in order of evaluation. Administrators can change the order by dragging rules up and down the list accordingly.

11. Select **"Save All Changes"** to save and confirm all changes.

Additional Note: The administrator can add as many rules as necessary before saving all changes.

Any emails sent to the user **"test21"** with the subject equal to **"automatic email import"** are automatically filed into a date/time folder (created if folder does not already exist) as a child folder of the EmailSync folder in DocMoto. See [Fig. INBOX – mailbox rule results](#).

Fig. INBOX – mailbox rule results:



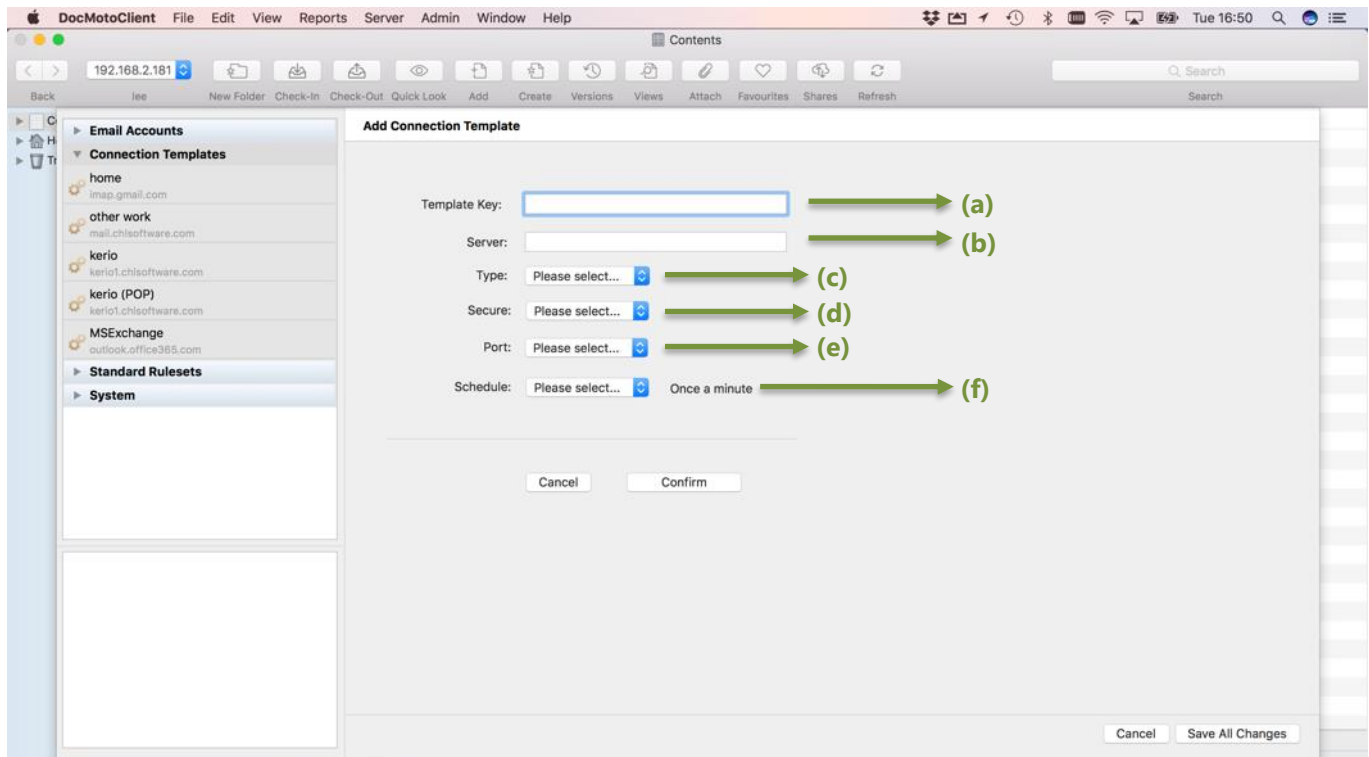
- (a) EmailSync/2017-12-19 – DocMoto folder to store emails imported via mailbox rule.
- (b) Email – imported into the system in accordance with INBOX mailbox rule.

Adding a Connection Template:

This section covers how administrators add a connection template. The examples assume the “**Email Import Configuration**” option from the “**Admin**” menu is selected.

1. Select “**Add**” or “**+**” on the “**Connection Templates**” section. An Add Connection Template interface is presented. See [Fig. Add Connection Template](#).

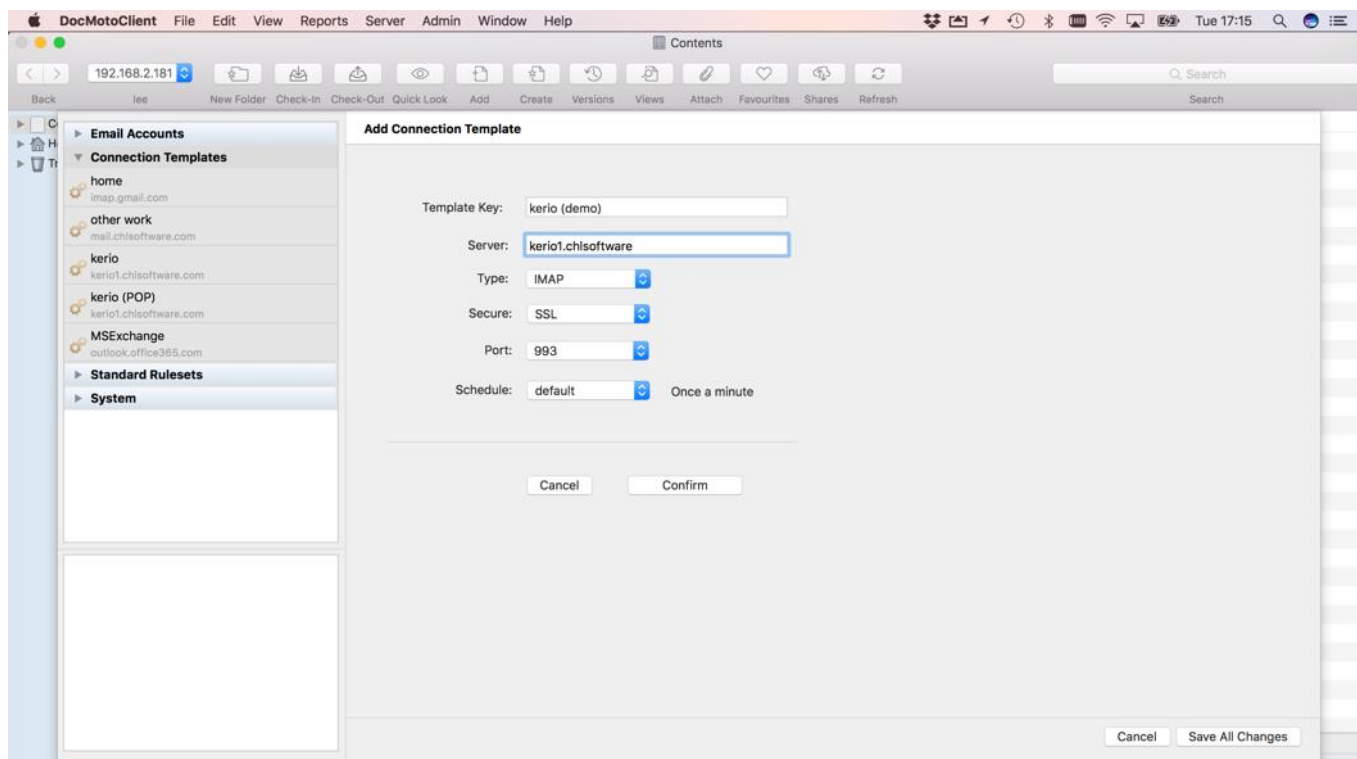
Fig. Add Connection Template:



- (a) **Template Key:** - Key or label for the connection template.
- (b) **Server:** - Address of the email server.
- (c) **Type:** - The Type of email server:
 - IMAP
 - POP3
- (d) **Secure:** – SSL (secure socket layer) or Non-SSL.
- (e) **Port:** - The port the email server communicates on.
- (f) **Schedule:** - The frequency the system pols the email server:
 - default (as defined in System)
 - frequent (as defined in System)
 - infrequent (as defined in System)
 - Every 5 minutes

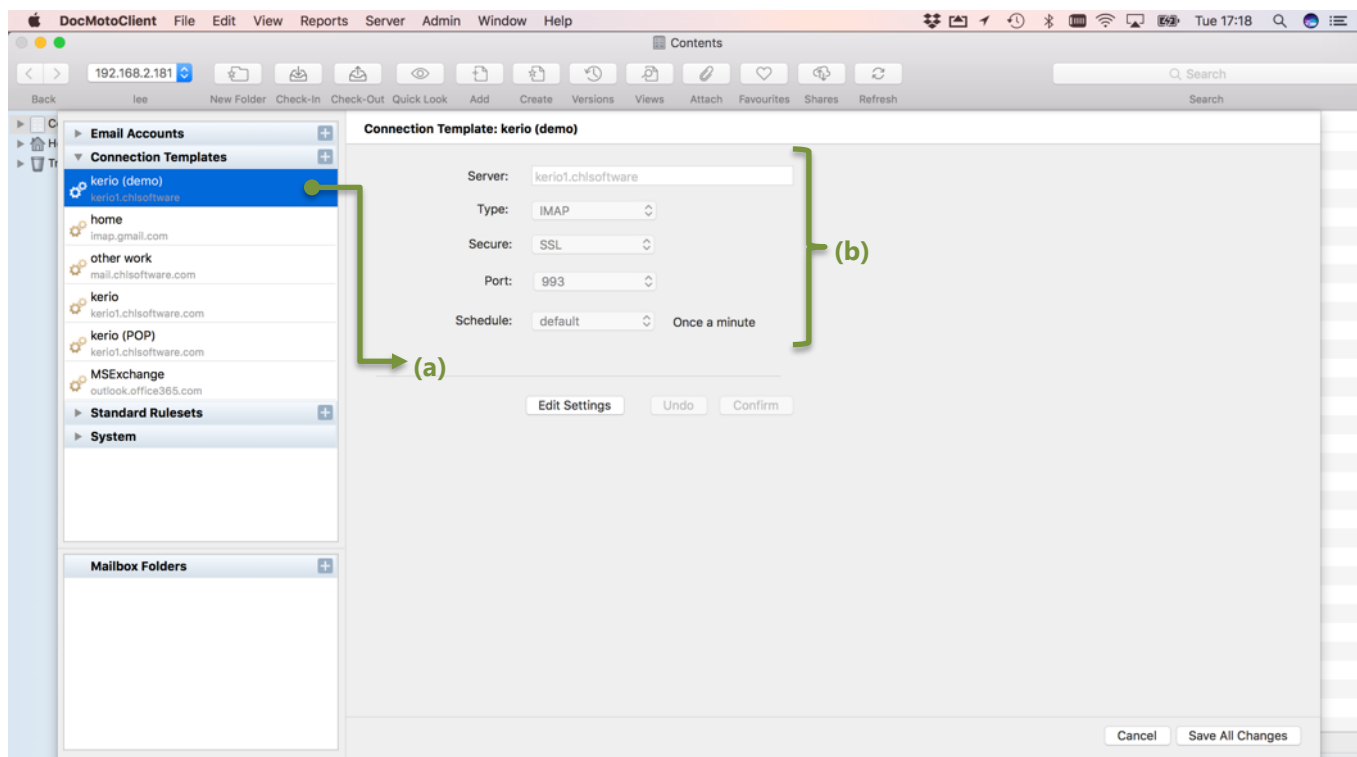
2. Enter or select the values to enable the system to connect to the mail server. See [Fig. Add Connection Template – with values](#):

Fig. Add Connection Template – with values:



3. Select **“Confirm”**. The Connection Template **kerio (demo)** is created, saved & listed under the connection templates section. See [Fig. Connection Template – saved](#).

Fig. Connection Template – saved:



- (a) **kerio (demo)** – Connection Template created & saved.
- (b) **Email server values** – mail server connection details.

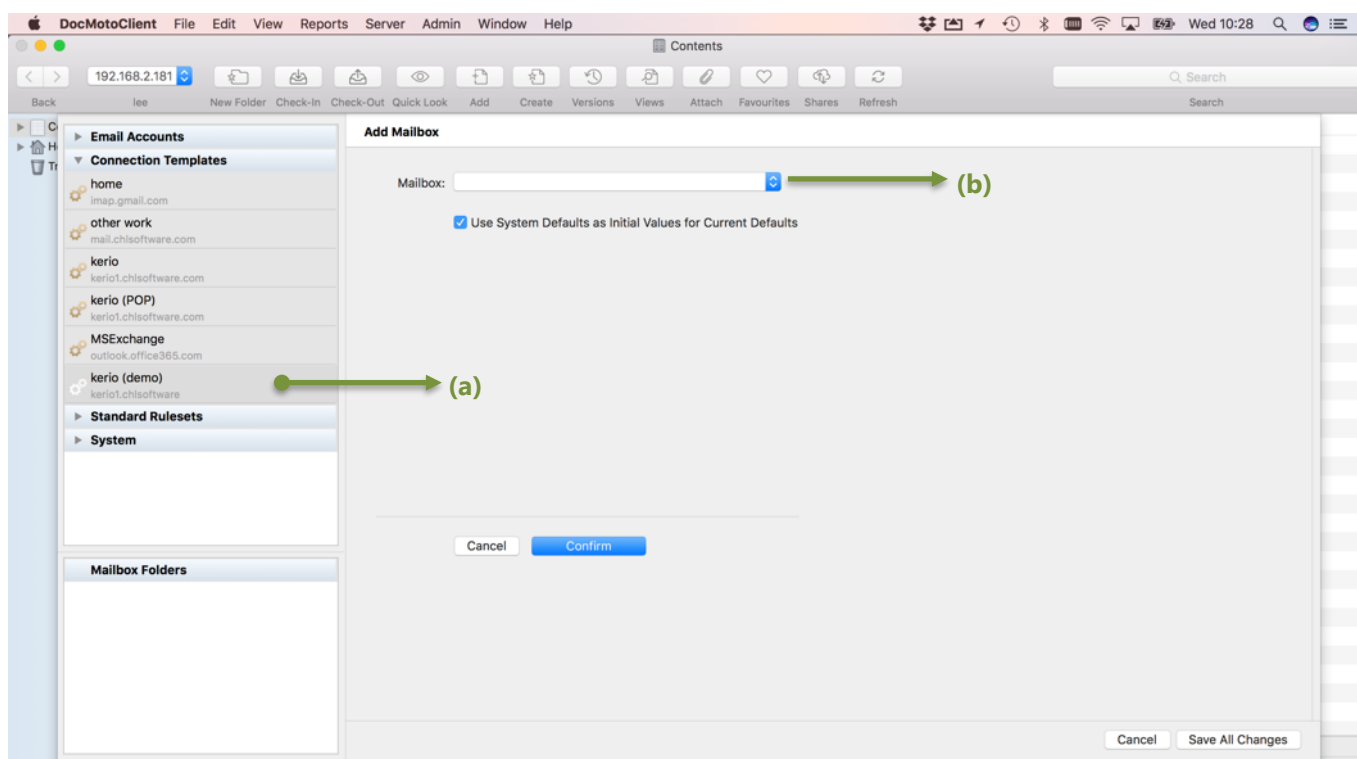
The connection template is now ready for use (if the **Save All Changes** option is selected). It is also possible to add mailboxes to connection templates, ensuring a connection to the mail server with mailboxes automatically registered against a user's account.

Adding a mailbox to a connection template:

This section covers how administrators add a mailbox to a connection template. This example leads directly on from the last section where the **kerio (demo)** connection template was created.

1. Select the connection template to add a mailbox too. In this example, we are using the connection template **kerio (demo)** created in the last example.
2. Select **Add** or "+" on the Mailbox Folders section. An Add Mailbox interface is presented. See [Fig. Add Mailbox interface \(connection template\)](#).

Fig. Add Mailbox interface (connection template):

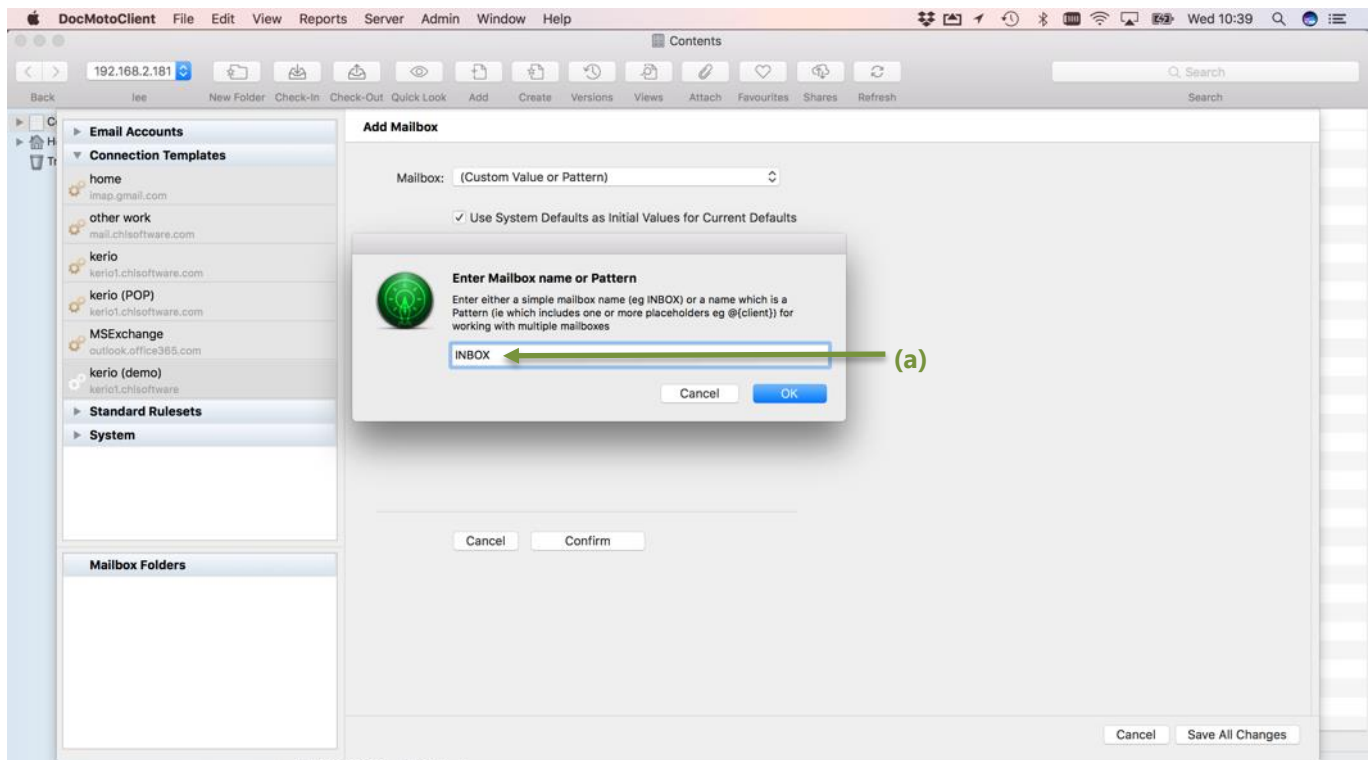


(a) **kerio (demo)** – connection template.

(b) **Mailbox:** - list of custom mailbox patterns. As no mail server is being interrogated for mailboxes, this list only includes custom patterns.

3. Select **(Custom Value or Pattern)** from the Mailbox: list.
4. A dialog is presented to the administrator enabling them to enter the name of the mailbox or a pattern to match mailboxes. In this example, the administrator enters **INBOX** as the mailbox. See [Fig. Add Mailbox - Custom Value or Pattern](#)

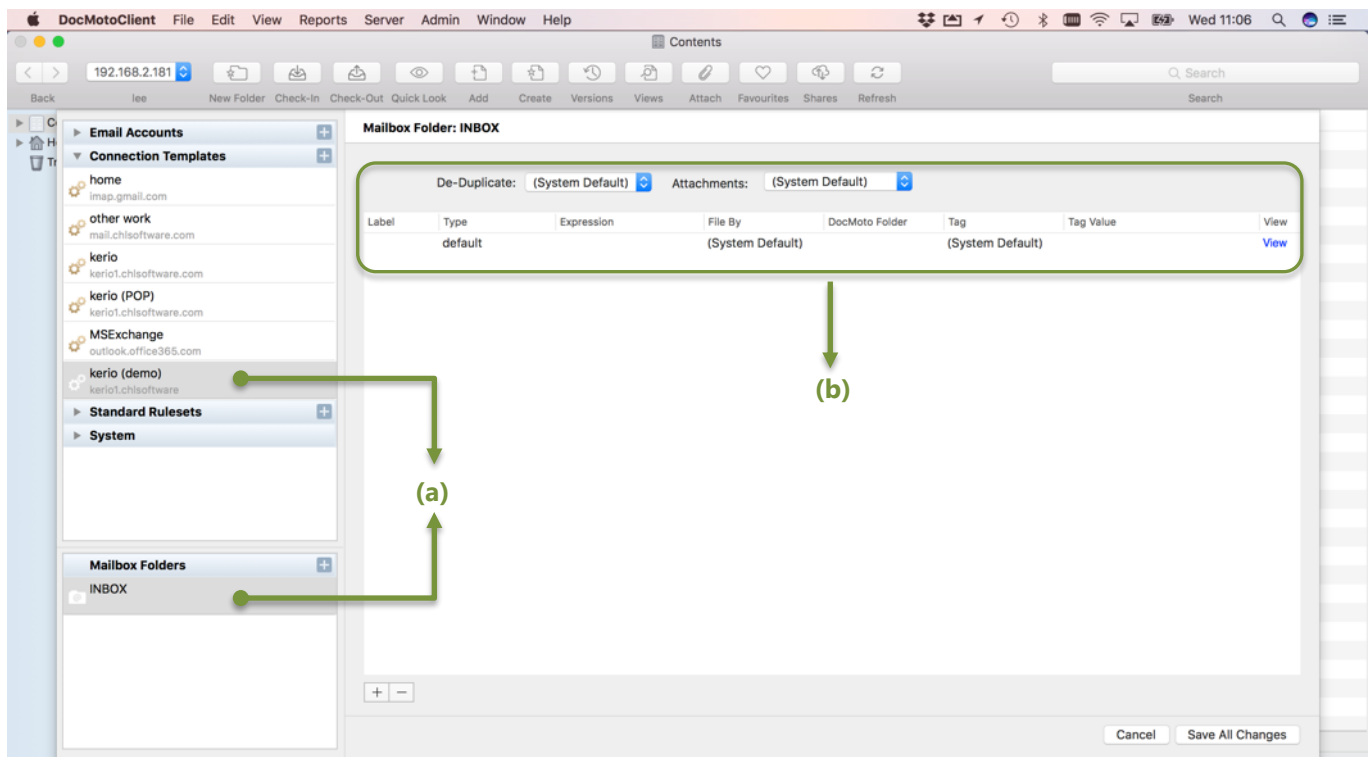
Fig. Add Mailbox – Custom Value or Pattern:



(a) **INBOX** – mailbox registered to kerio (demo) connection template.

5. Select **“OK”** to register the **INBOX** as a mailbox folder for the connection template.
6. Select **“Confirm”** to save the changes. See [Fig. Add Mailbox \(INBOX\) to kerio \(demo\) connection template.](#)

Fig. Add Mailbox (INBOX) to kerio (demo) connection template:



- (a) kerio (demo) connection template with INBOX registered as part of connection template.
- (b) defaults applied automatically to INBOX.

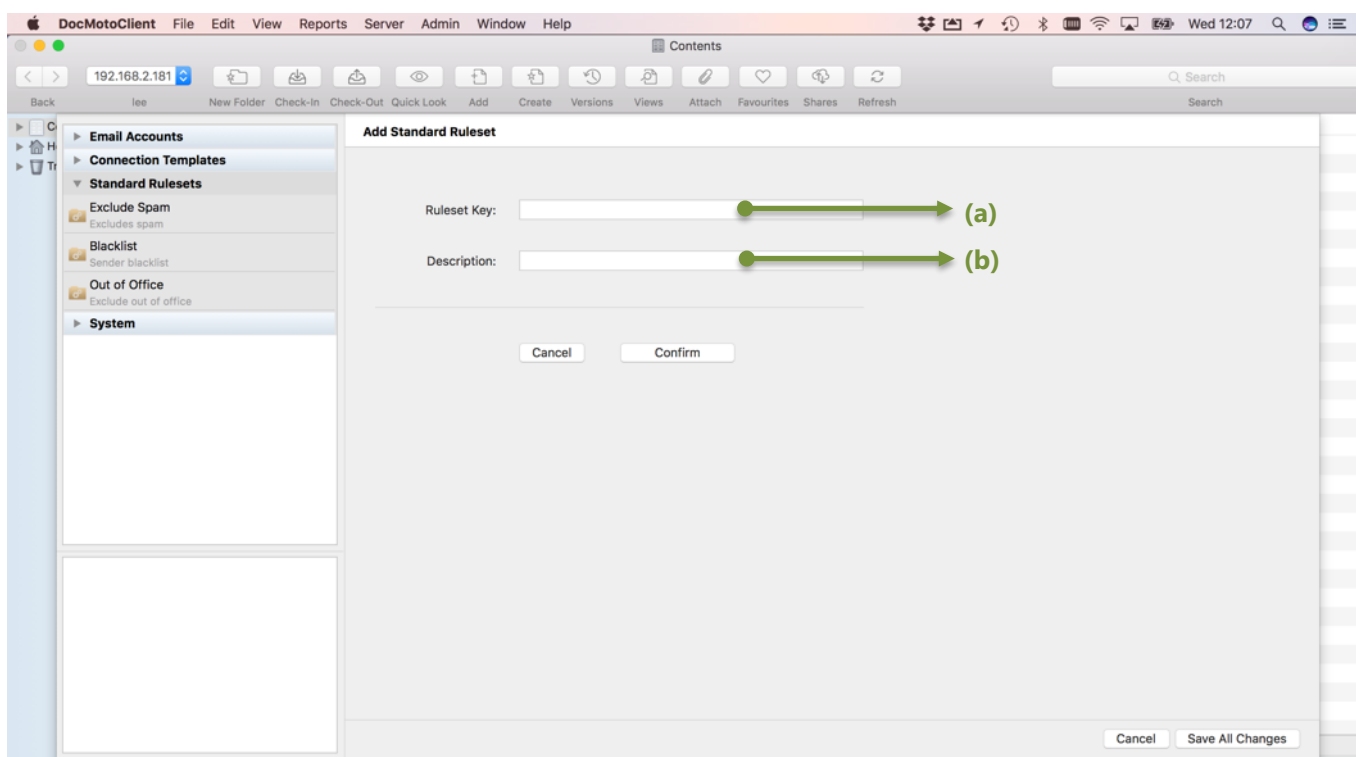
7. Select **“Save All Changes”** to complete process.

Adding a Standard Ruleset:

This section covers how administrators add a standard ruleset. The examples assume the **“Email Import Configuration”** option from the **“Admin”** menu is already selected.

1. Select **“Add”** or **“+”** on the section header **Standard Rulesets**. An Add Standard Ruleset interface is presented. See [Fig. Add Standard Ruleset](#).

Fig. Add Standard Ruleset:

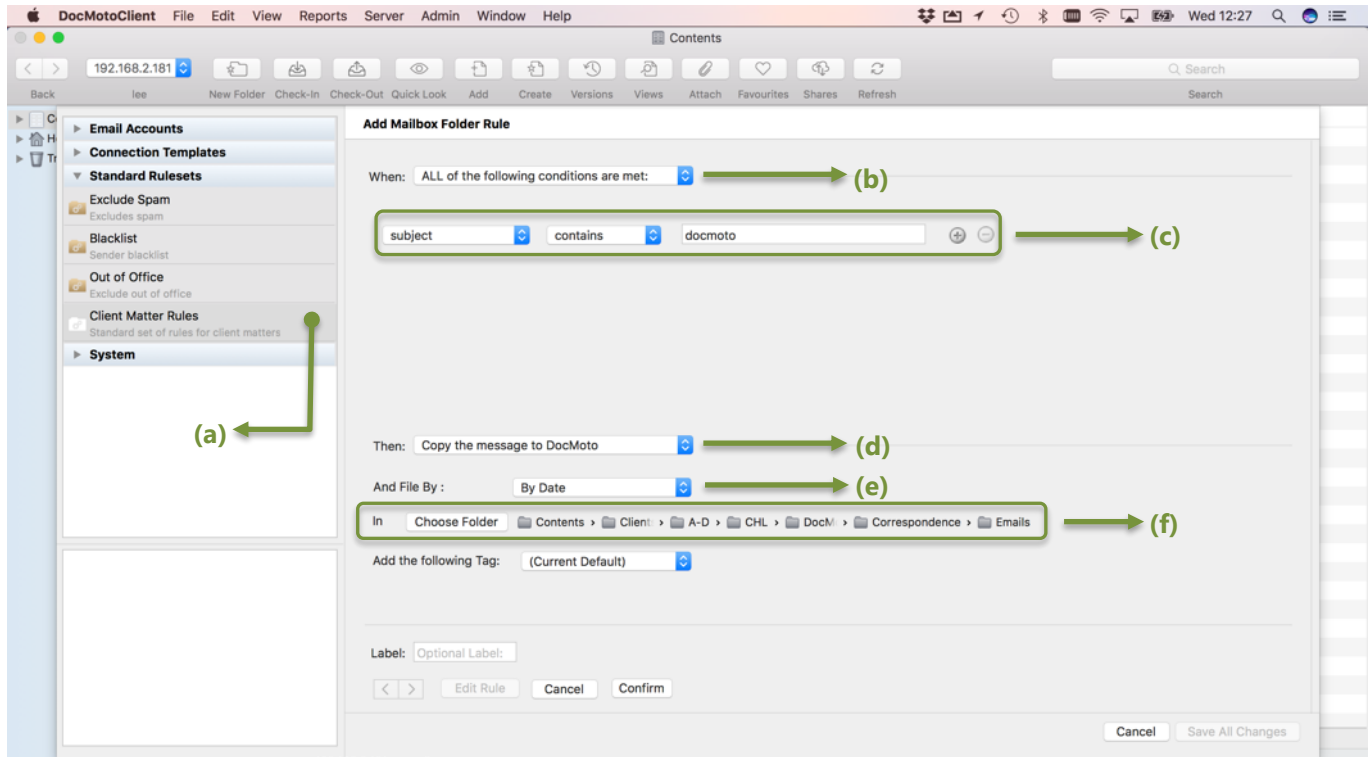


(a) **Ruleset Key:** - Key or label for the ruleset. Referred to by mailbox rules.

(b) **Description:** - As stated.

2. Enter a **Ruleset Key** & **Description** for the ruleset. In this example, the **Ruleset** Key is set to “Client Matter Rules” and the Description is set to “Standard set of rules for client matters”. Select **“Confirm”** to create.
3. Ensuring the **“Client Matter Rules”** ruleset is selected, select the **“+”** button (bottom left-hand corner of Standard Ruleset: Client Matter Rules interface) to add rule. An Add Mailbox Folder Rule interface is presented.
4. Edit and set the rule accordingly. See [Fig. Adding first rule to ruleset](#).

Fig. Adding first rule to ruleset:

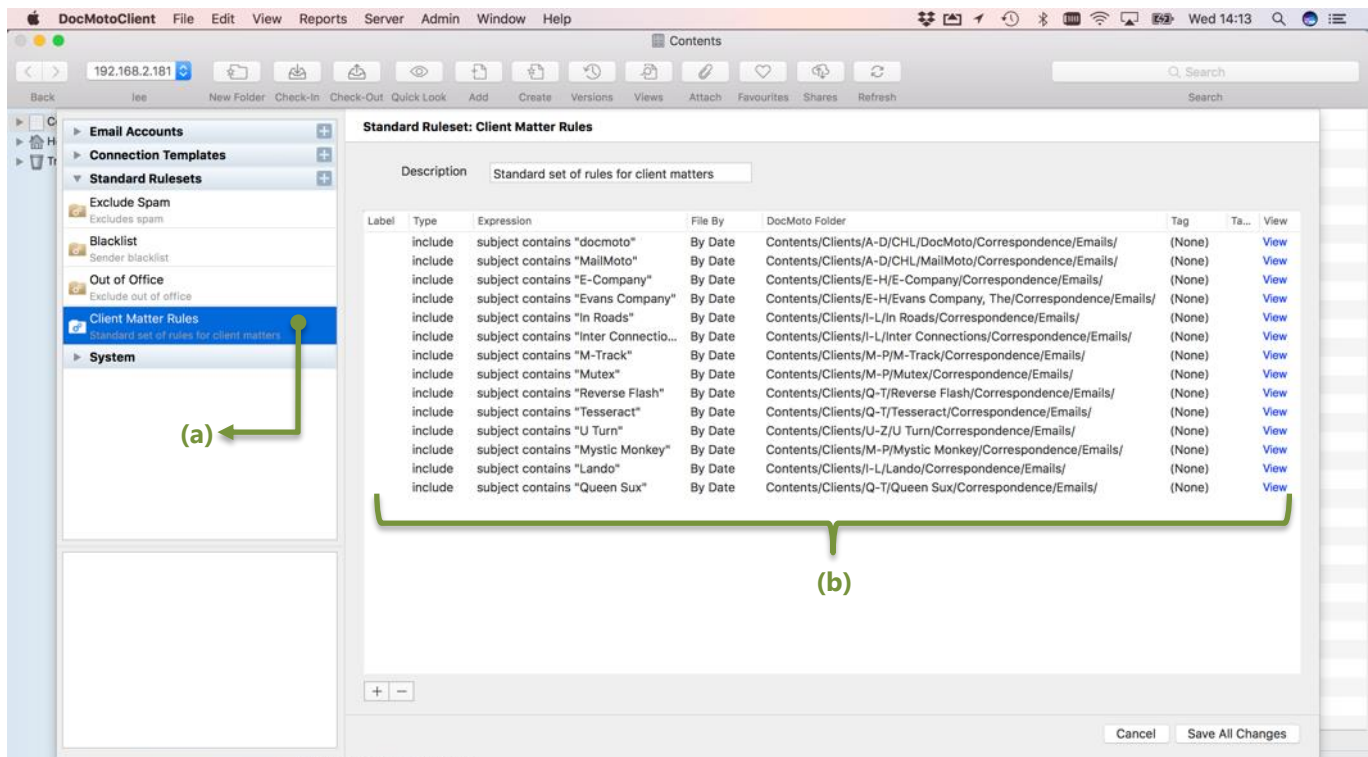


- (a) **Client Matter Rules** – newly created ruleset.
- (b) **Conditions to apply** – When **ALL** of the following conditions are met (AND condition).
- (c) **Condition(s)** – the condition(s)/rule(s) to be applied. In this example, if the **Subject** of the email **contains** “docmoto”.
- (d) **Then:** - the actions to take when a rule is adhered too. In this example, **Copy the message to DocMoto**.
- (e) **And File By:** - how to file the email(s) that adhere to the rule(s). In this example, **By Date**.
- (f) **DocMoto Folder:** - the DocMoto folder to import the email(s) that adhere to the rule. In this example, **Contents/Clients/A-D/CHL/DocMoto/Correspondence/Emails**

Repeat steps 3 – 4 for as many rules needed. See [Fig. Complete Ruleset](#).

5. Select **“Save All Changes”** to confirm.

Fig. Complete Ruleset:



(a) **Client Matter Rules** – Standard set of rules for client matters.

(b) **The Rules** – to be assessed and applied in order of sequence.

Adding a Standard Ruleset (supplementary section):

This section illustrates to administrators how to associate a standard ruleset to either:

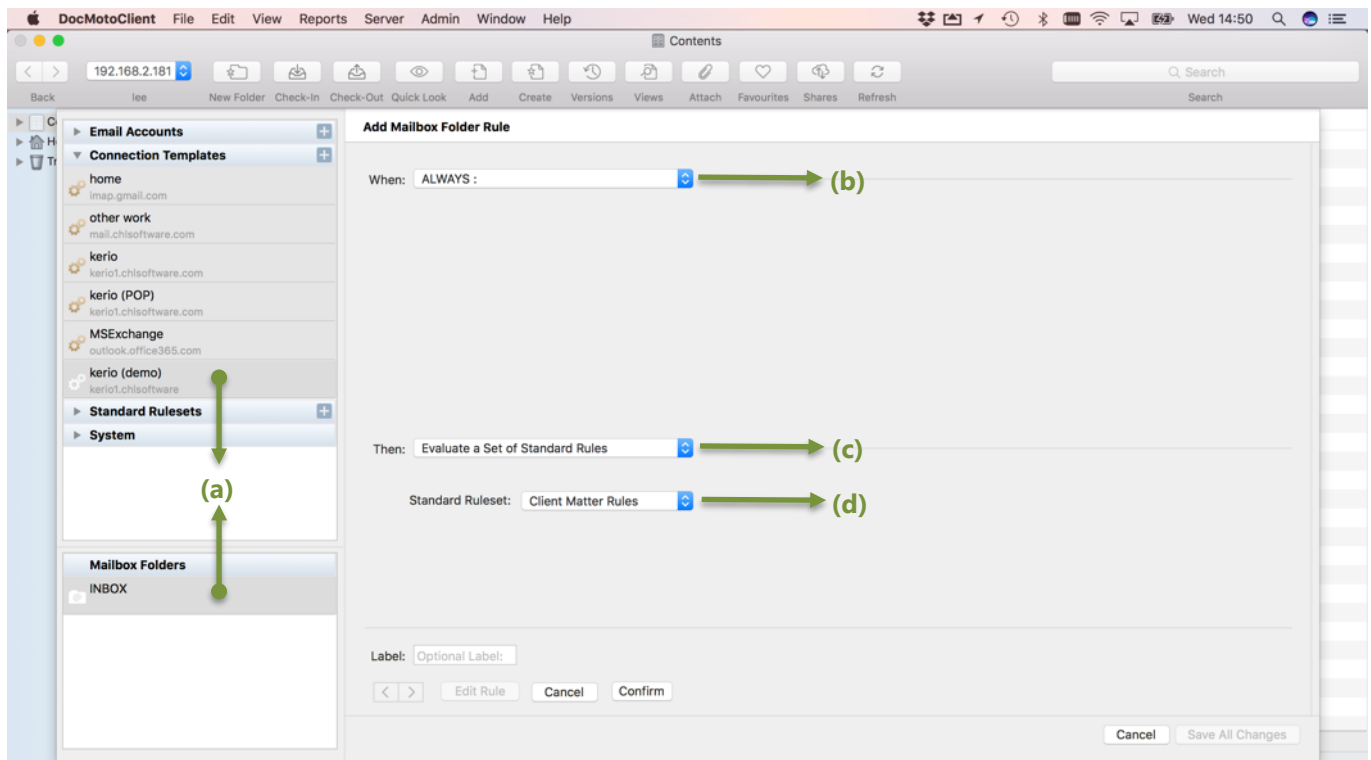
1. A connection template.
2. A user's mailbox rule.

Adding a standard ruleset to a connection template:

The examples assume the "Email Import Configuration" option from the "Admin" menu is already selected.

1. Select the Connection Template from the Connection Templates section. In this example, the **kerio (demo)** connection template created in an earlier example.
2. Select the Mailbox Folder associated to the connection template (**kerio (demo)**). In this example, the **INBOX** mailbox folder added to the connection template **kerio (demo)**, added in an earlier example.
3. A Mailbox Folder interface will be presented. Select "+" (bottom left-hand corner of interface) to add rule.
4. Leave the "When:" condition to "ALWAYS".
5. Select "Evaluate a Set of Standard Rules" option from the "Then:" list.
6. Select Standard Ruleset from the Standard Ruleset list. In this example, the "Client Matter Rules" ruleset. See [Fig. Adding a standard ruleset to a connection template.](#)

Fig. Adding a standard ruleset to a connection template:



- (a) **kerio (demo) connection template & INBOX** mailbox folder.
- (b) **When:** Always apply.
- (c) **Then:** - Evaluate a Set of Standard Rules.
- (d) **Standard Ruleset** – Client Matter Rules.

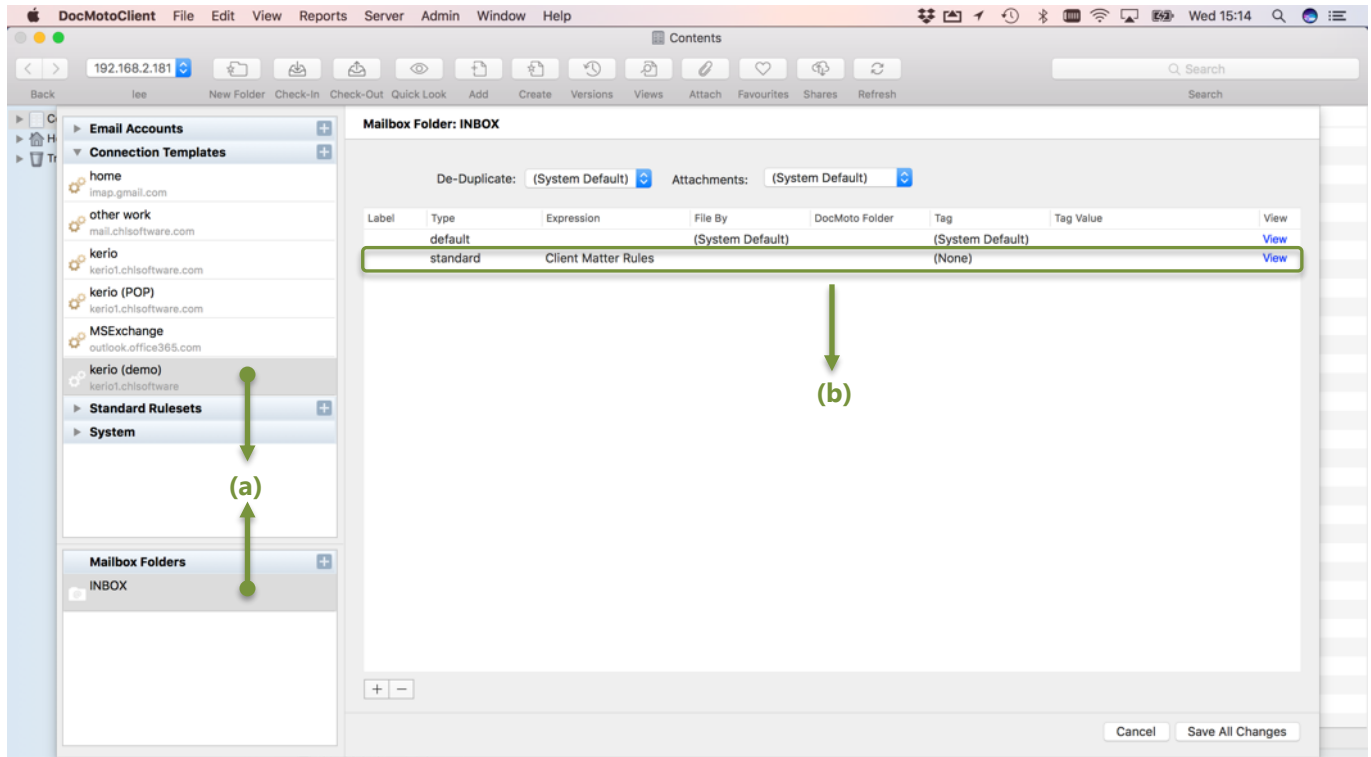
7. Select **“Confirm”**. The standard ruleset **“Client Matter Rules”** is set against the user’s INBOX mailbox folder as part of the connection template **kerio (demo)**.

NOTE: By creating a standard ruleset for all ongoing matters (or projects, clients) this can be included as part of the connection template for all mailboxes required (INBOX, Sent Items, etc). Furthermore; administrators can update the standard ruleset (**Client Matter Rules** – in this example) when a new client matter (or project, clients) is opened and the rule is applied to all users simultaneously. When administrators have to create a new user account they will pick up the rules automatically.

See [Fig. Standard Ruleset applied to connection template.](#)

8. Select **“Save All Changes”** when complete.

Fig. Standard Ruleset applied to connection template.



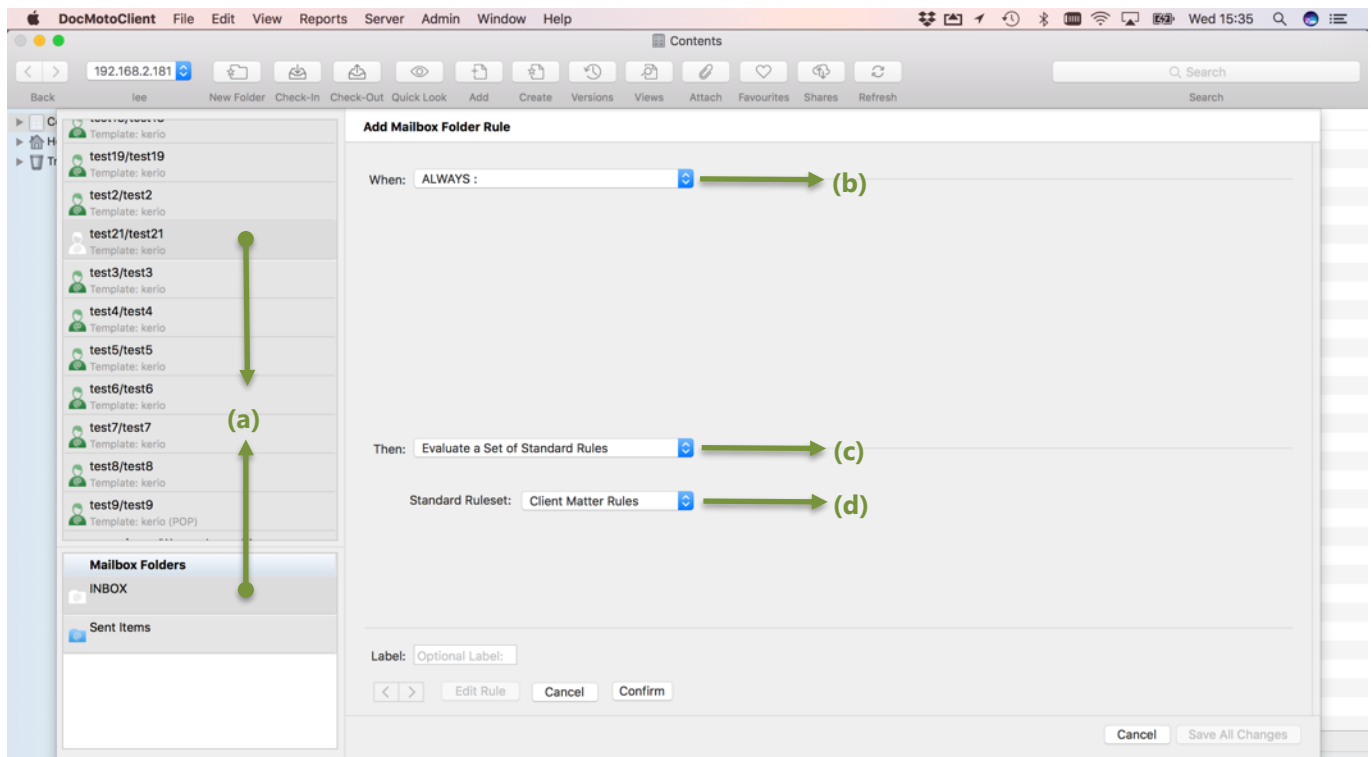
- (a) kerio (demo) connection template & INBOX mailbox folder.
- (b) Client Matter Rules.

Adding a standard ruleset to a user's mailbox:

The examples assume the "Email Import Configuration" option from the "Admin" menu is already selected.

1. Select the user's email account from the "Emails Accounts" section. In this example, test21.
2. Select Mailbox Folder from the "Mailbox Folder" section. In this example, INBOX.
3. A Mailbox Folder interface is presented. Select "+" (bottom left-hand corner of interface) to add rule.
4. Leave the "When:" condition to "ALWAYS".
5. Select "Evaluate a Set of Standard Rules" option from the "Then:" list.
6. Select Standard Ruleset from the Standard Ruleset list. In this example, the "Client Matter Rules" ruleset. See [Fig. Adding a standard ruleset to a user's mailbox.](#)

Fig. Adding a standard ruleset to a user's mailbox:



(a) test21/test21 (user email account) & **INBOX** (mailbox folder).

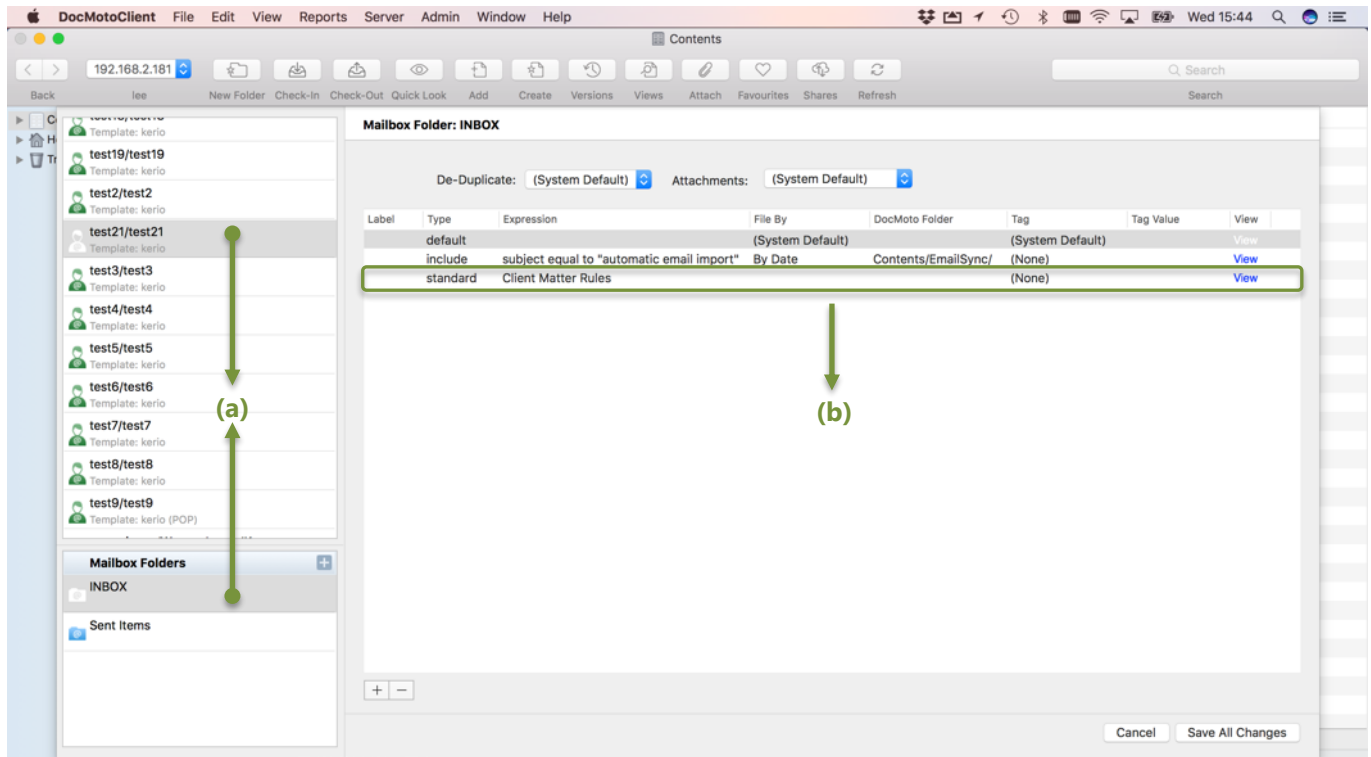
(b) When: Always apply.

(c) Then: - Evaluate a Set of Standard Rules.

(d) Standard Ruleset – Client Matter Rules.

7. Select "**Confirm**". The standard ruleset "**Client Matter Rules**" is set against the user's (test21) INBOX mailbox. See [Fig. Standard Ruleset applied to user's mailbox](#).
8. Select "**Save All Changes**" when complete.

Fig. Standard Ruleset applied to connection template.



- (a) **test21/test21** (user email account) & **INBOX** (mailbox folder).
- (b) Client Matter Rules.

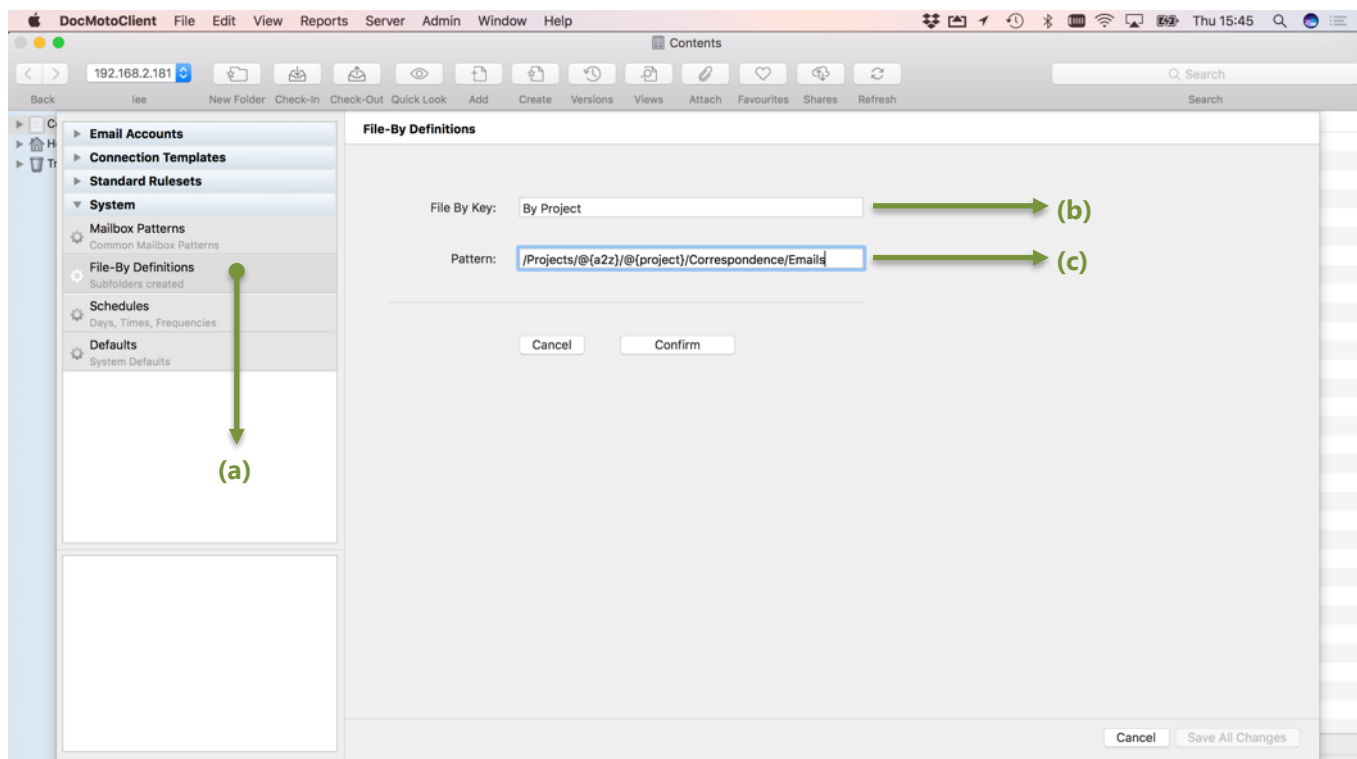
Adding a File-By Definition:

This section covers how administrators can add a File-By definition. A File-By definition enables the system to intelligently file emails (adhering to a rule) in DocMoto, creating sub-folders as necessary.

The examples assume the **"Email Import Configuration"** option from the **"Admin"** menu is already selected.

1. Select **"File-By Definitions"** from the **"System"** section.
2. Select **"+"** (bottom left-hand corner) to add new definition. A File-By Definition interface is presented enabling the administrator to enter:
 - a. File By Key
 - b. Pattern
3. Enter values for **File By Key** & **Pattern**. See [Fig. New File-By Definition](#).
4. Select **"Confirm"** to save File-By definition. See [Fig. Saved File-By Definition](#).

Fig. New File-By Definition:

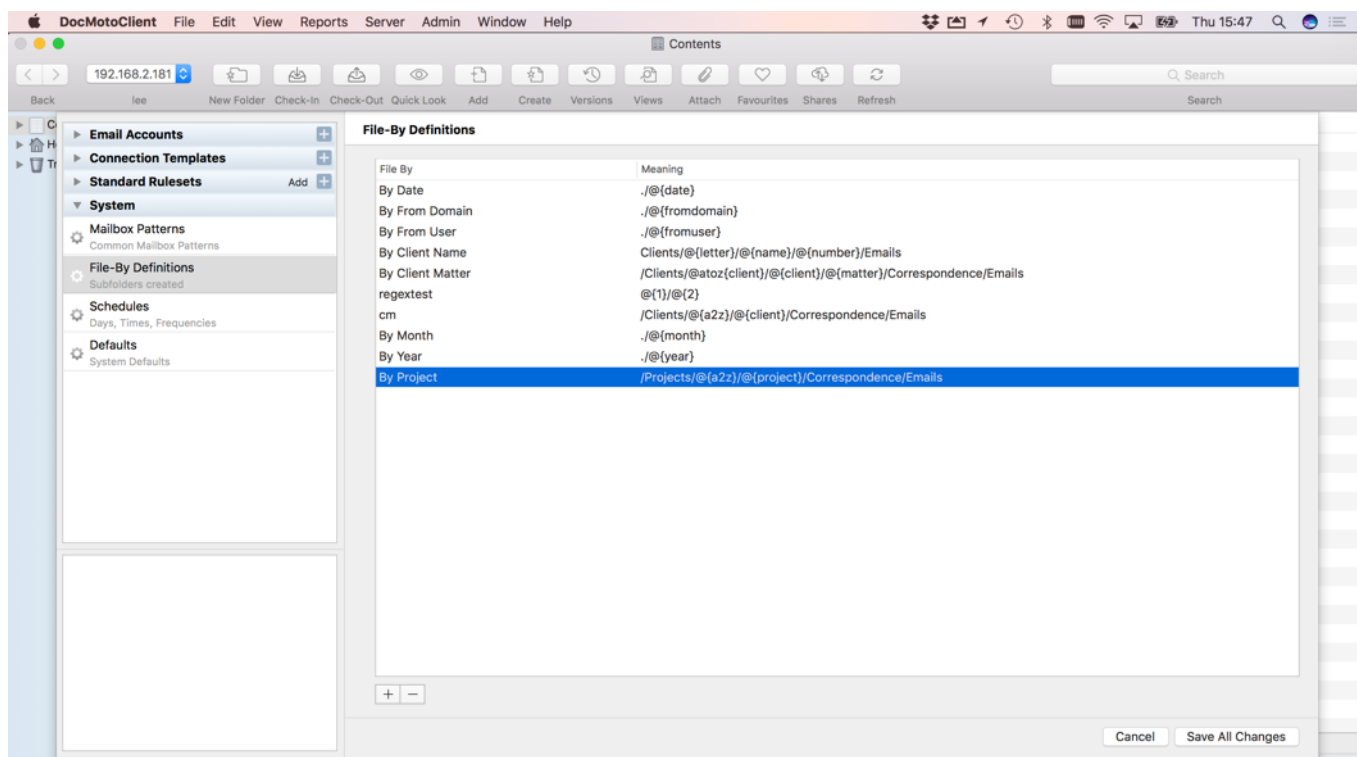


(a) File-By Definitions – How to file the emails that adhere to the rule.

(b) File By Key: - Key or label to be referred to by pattern matches (this will be covered later in this document).

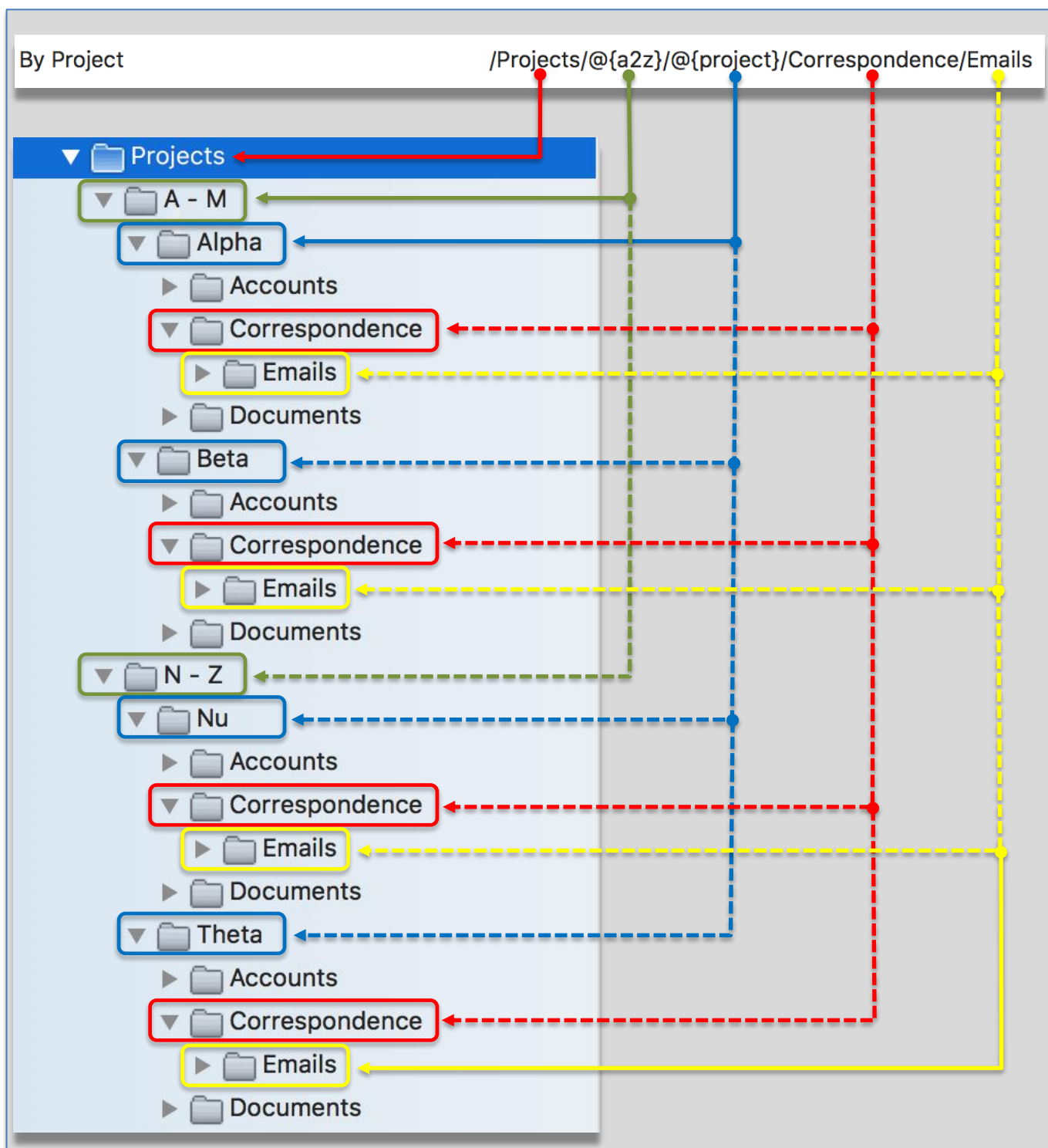
(c) Pattern: - intelligent folder matching for filing purposes. A more in depth look at the example pattern illustrated above can be found below.

Fig. Saved File-By Definition



File-By Pattern example - In depth look:

The File-By pattern matches the pattern to folders in DocMoto using a combination of variables (or placeholders) and existing folders within DocMoto. It breaks down as follows:



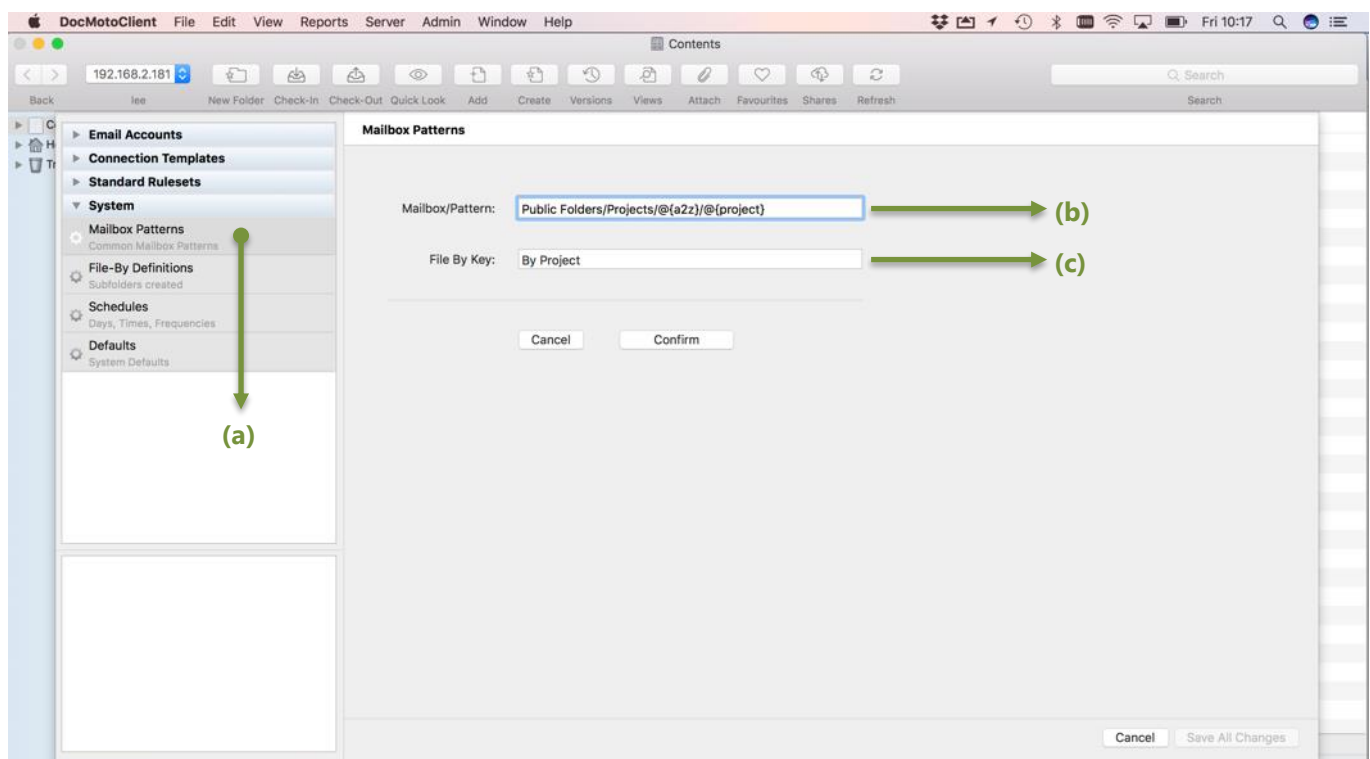
The projects listed (above) in DocMoto were created via a folder template ensuring continuity and consistency in terms of the folder structures created. This makes pattern matching far easier. If File-By definitions are used in conjunction with Mailbox Patterns the mail import routines are truly automated and self-learning.

Adding a Mailbox Pattern:

This section covers how administrators can add a Mailbox Pattern. A Mailbox Pattern enables the system to intelligently file emails (adhering to a rule) in DocMoto, creating sub-folders as necessary. The examples assume the **“Email Import Configuration”** option from the **“Admin”** menu is already selected.

1. Select **“Mailbox Patterns”** from the **“System”** section.
2. Select **“+”** (bottom left-hand corner) to add new definition. A Mailbox Pattern interface is presented enabling the administrator to enter:
 - a. Mailbox/Pattern
 - b. File-By Key
3. Enter values for **Mailbox Pattern & File By Key**. See [Fig. New Mailbox Pattern](#).
4. Select **“Confirm”** to save Mailbox Pattern. See [Fig. Saved Mailbox Pattern](#).

Fig. New Mailbox Pattern:

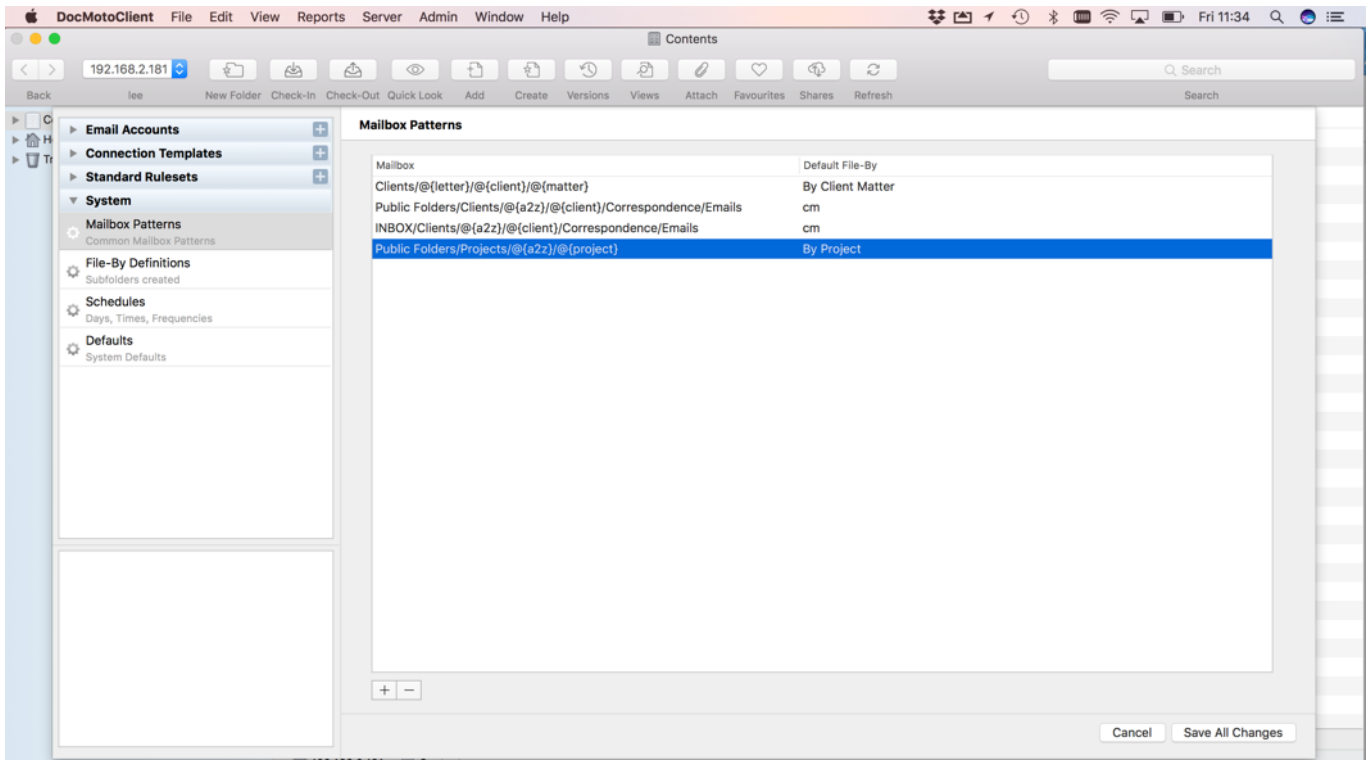


(a) Mailbox Pattern – Common mailbox patterns.

(b) Mailbox/Pattern: - intelligent mailbox pattern matching. A more in depth look at the example pattern illustrated above can be found below.

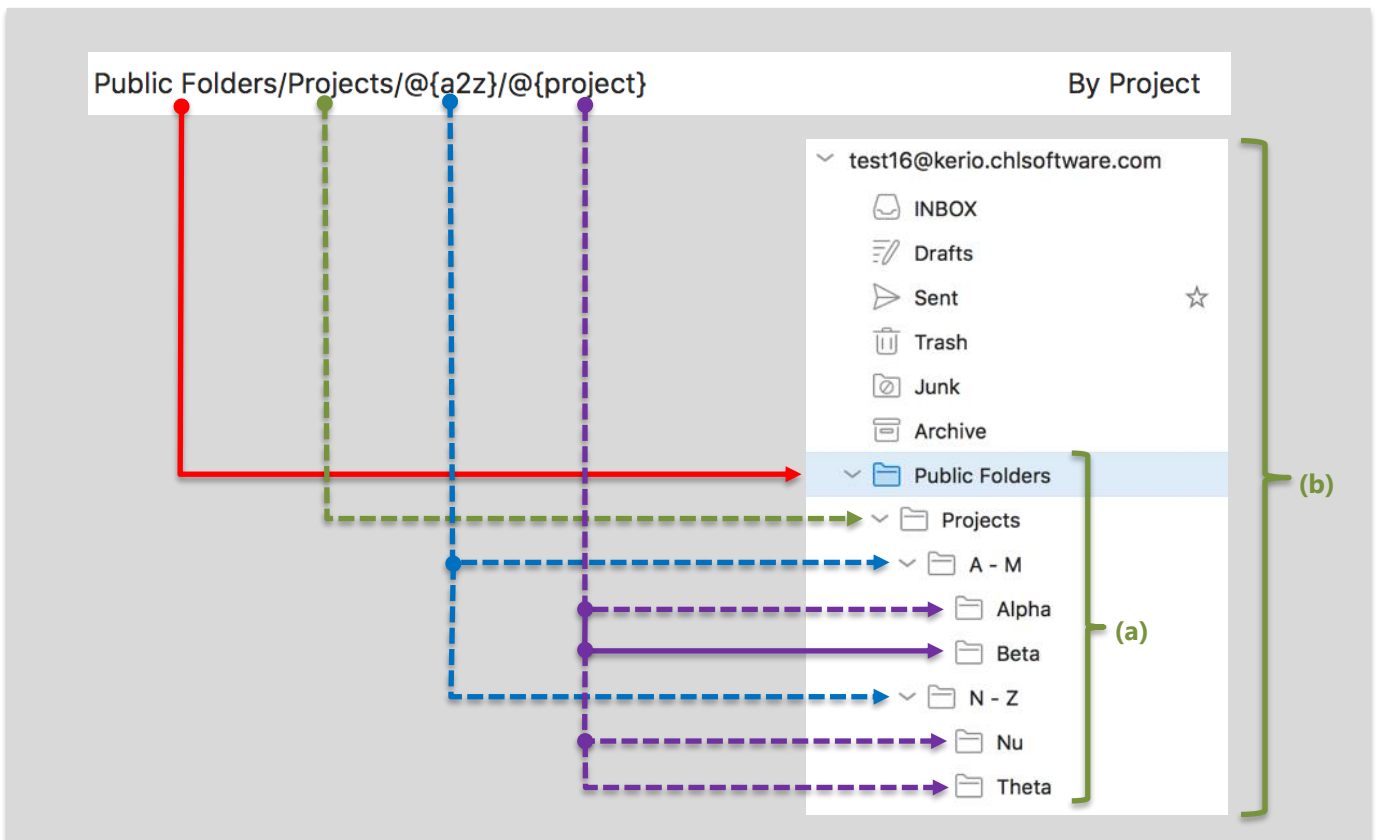
(c) File By Key: - Key or label to be referred to by pattern matches

Fig. Saved Mailbox Pattern:



Mailbox Pattern example - In depth look:

The Mailbox Pattern matches the pattern to mailbox folders in the mail servers using a combination of variables (or placeholders) and existing folders within the mail server's IMAP folders. It breaks down as follows:



(a) **Public Folders** – IMAP public folder (users must be subscribed to public folders). If users need to create public folders they must have permission.

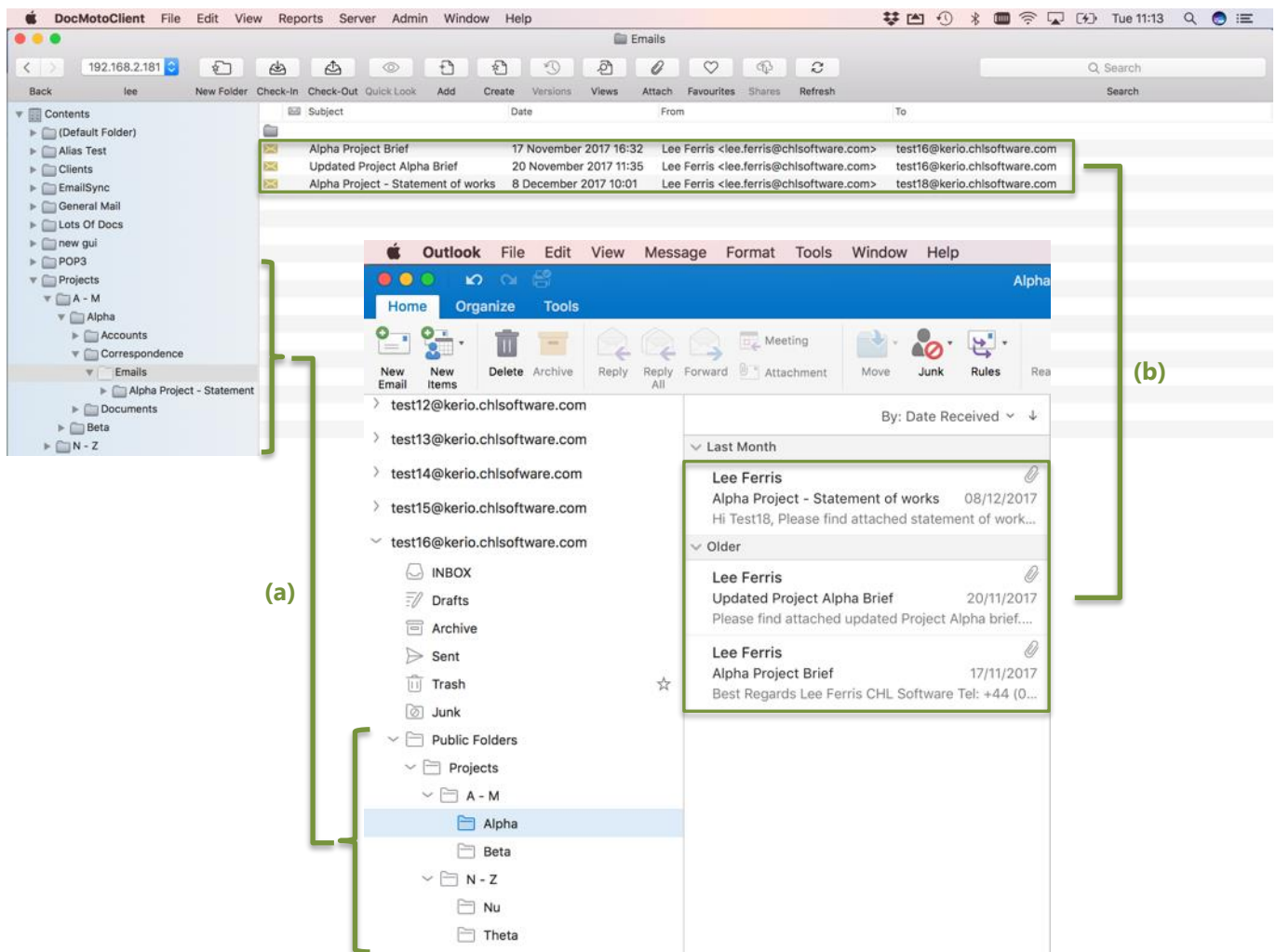
(b) **test16@kerio.chlsoftware.com** - User's email account mounted in MS Outlook. User has subscribed to the IMAP public folder "**Projects**".

Any Emails filed into the public project folders (contained within the IMAP public folder "**Projects**"):

1. Alpha
2. Beta
3. Nu
4. Theta

Will be imported into DocMoto via the **Projects "File-By"** definition. See [Fig. Emails filed via Pattern Matching.](#)

Fig. Emails filed via Pattern Matching:



(a) DocMoto Project folders pattern matched to IMAP Public Folder Projects.

(b) Emails filed into IMAP Public Folder Projects imported directly into DocMoto folder via **Project File-By** definition.