

Attachment Manager for Outlook

Enterprise Deployment Guide

Steps for pushing pre-configured settings of Attachment Manager add-in to multiple systems

With this guide, you would be able to quickly and easily pre-configure common settings of Attachment Manager and push to multiple systems for a centralized administration and deployment.

Why push pre-configured settings to multiple systems?

Simply put, to provide the administrator with complete control over output i.e., the way attachment files are stored, accessed and formatted in the organization. Pre-configuring settings and pushing to multiple users/systems also free up the requirement for individual user to perform the settings of the application on their own at the first place.

For instance, let us consider one of the most important option that administrator will want to configure - specifying a folder location on the office network that will store all the attachments detached from emails by users from their Outlook. By default, in normal single user installation, detached files from emails are designed to be stored under the local disk of the system.

i.e., C:\Users\[USERNMAME]\Documents\My Attachments

However, if users on your windows network don't have a fixed workstation or can logon from any systems, the storing the attachments on the local system would be not be suitable. Rather, for such environment, attachments should be stored on a central location that is accessible by the respective user logged from any systems such as a network folder. Something like *i.e., \\Server\Attachments\[USERNMAME]*

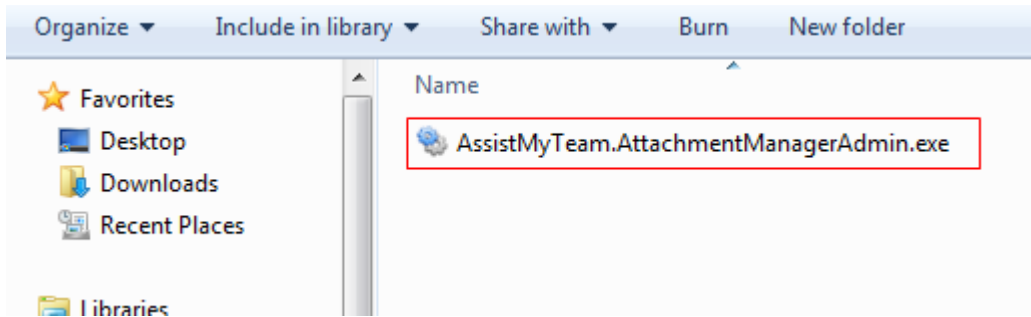
But such configuration can't be set by individual user easily on their own (as they might need administrator's rights as well as knowledge of settings permission to the folder). Even if they can, it would be cumbersome and unproductive.

So the solution is for the administrator to pre-configure these Attachment Manager settings and push it to all systems. The administrator can also set other common configurations, such as file overwrite policy, naming scheme of the detached files, and what information regarding the detached files are used when embedding the links/references to the emails, and which particular file extensions/formats to be skipped and exempted from being detached etc.

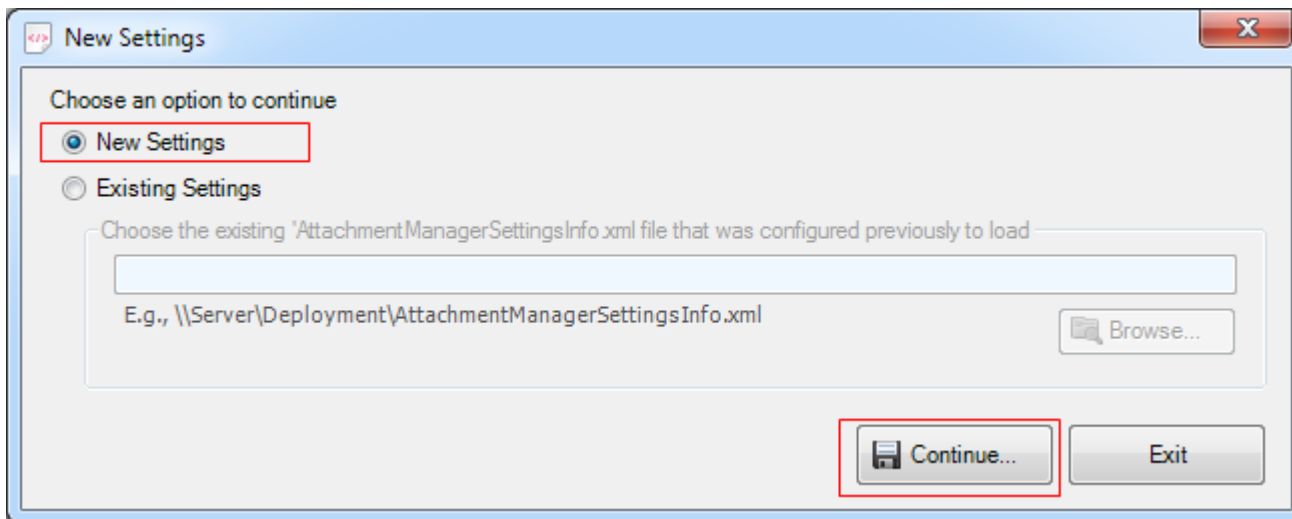
What you need?

- The Attachment Manager Admin tool, namely, **AssistMyTeam.AttachmentManagerAdmin.exe** which is made available to Enterprise license holders. If you don't have it, contact us.
- A network attachments repository folder e.g., *\\Server\Attachments*
- Another network shared folder for storing the pre-configured settings XML file e.g., *\\Server\Deployment*

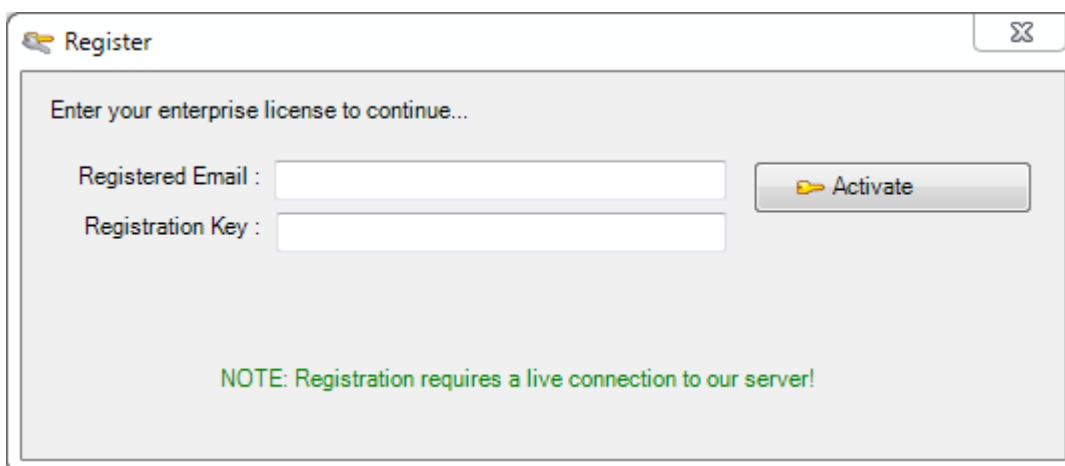
Step 1. Extract the **AssistMyTeam.AttachmentManagerAdmin.exe** application that you had received as part of your Enterprise license to a local disk in your system. We recommend that you place this file in a permanent location for future use (in the case that you want to modify the pre-configured settings in later date). You can create a shortcut to this .exe to your desktop for quick access.



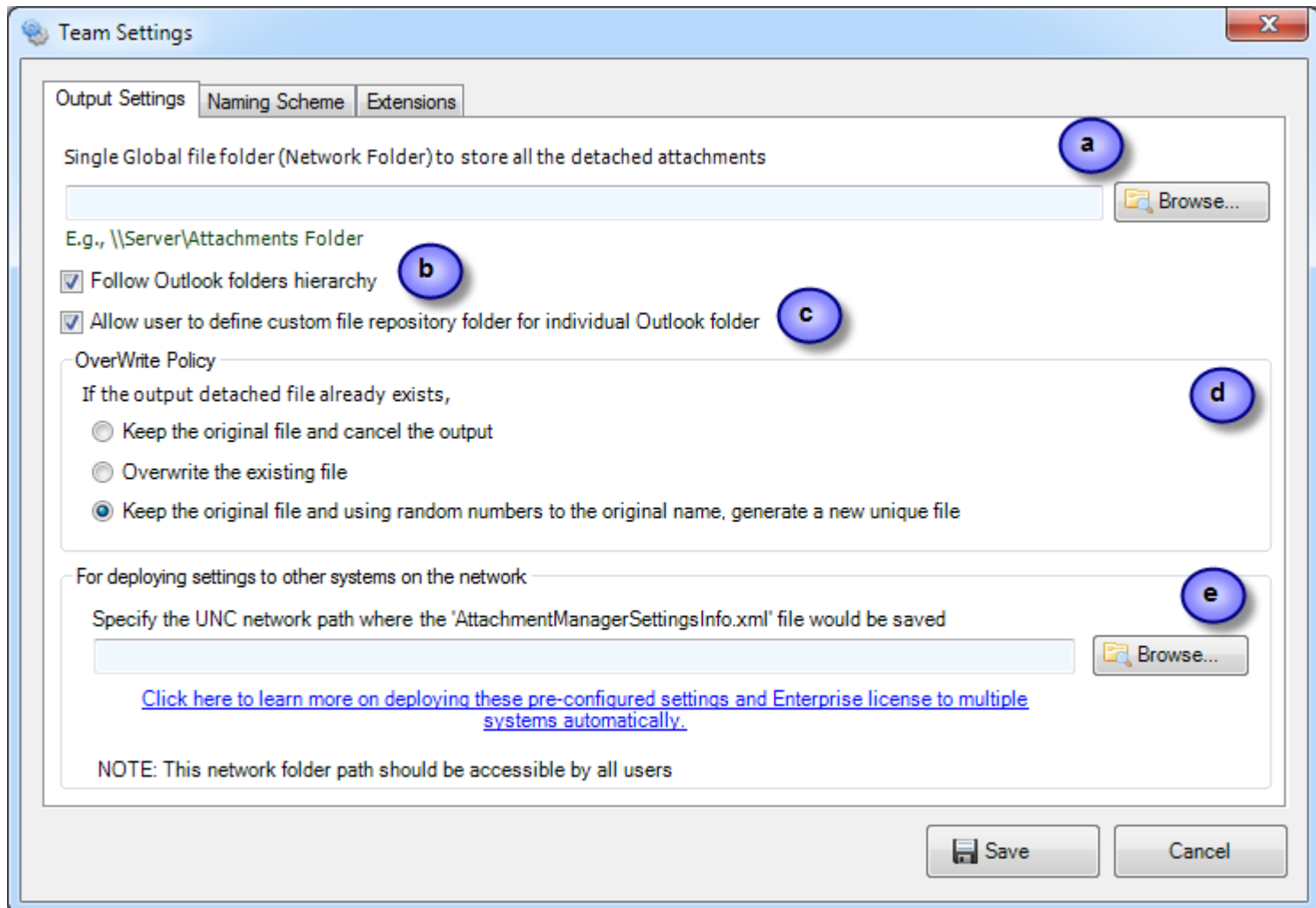
Step 2. As this is the first time running this tool on your system, it will show you the 'New Settings' dialog option. Here, you can choose to start with a new settings or connect to or load an existing setting XML file (*AttachmentManagerSettingsInfo.xml*). Choose 'New Settings' option and click 'Continue'.



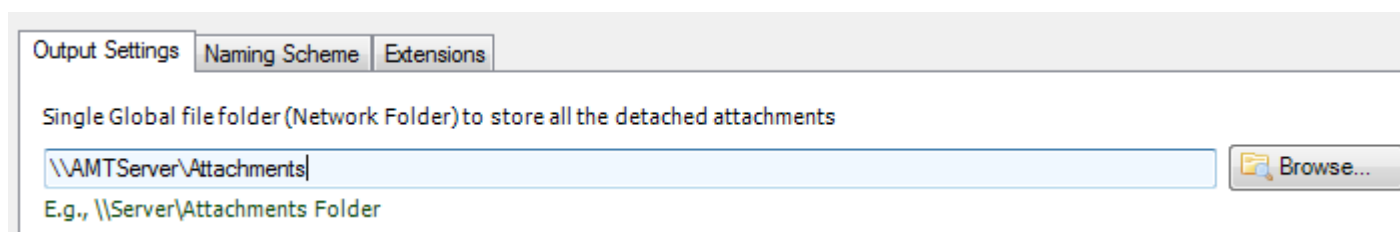
Step 3. Enter your enterprise license to authenticate. Only when the authentication succeeds, the tool will allow you to perform the pre-configuration of the settings for all users.



Step 4. Configure the team settings that would be pushed to all systems on the network.



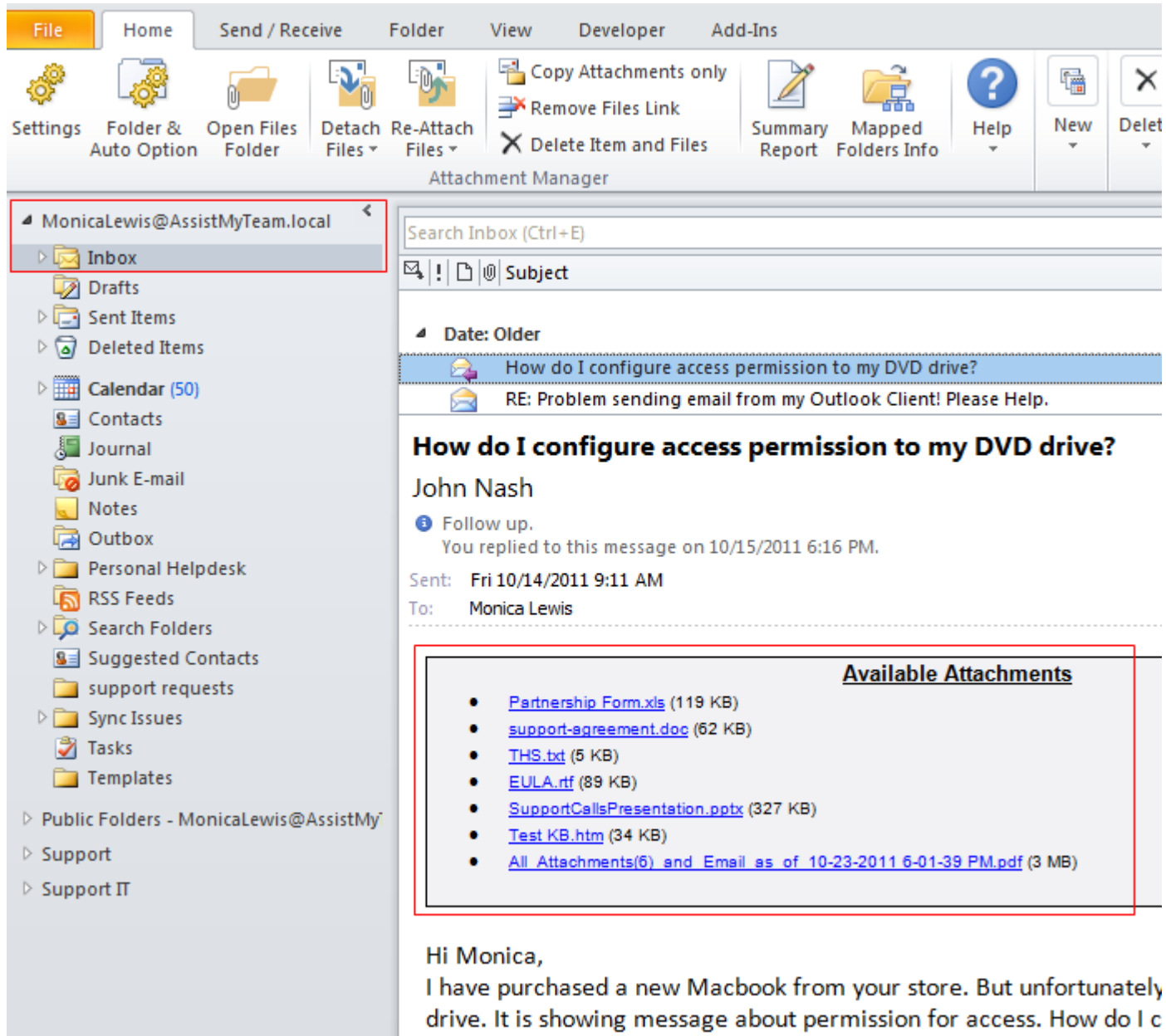
a) Single Global file folder (Network Folder) to store all the detached attachments: Specify a global network folder that will act as the root for storing all detached files. It is very important that this folder path be accessible to all users on the network. If required, adequate permissions must be granted for each user on this folder such that the add-in can create new subfolder or place new files into the chosen network folder. *E.g., \\Server\Attachments.*



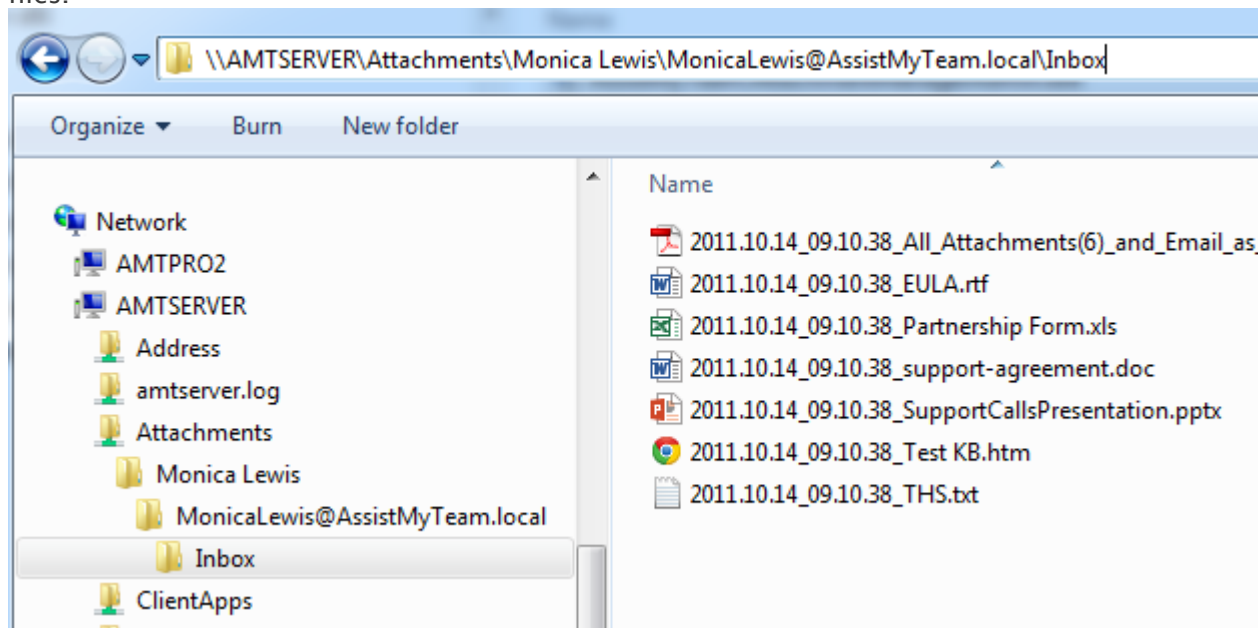
When this pre-configured setting is pushed to every system on your office network, the Attachment Manager add-in of each user will create new subfolders beneath the root network folder having the name of the user. For example, if the user of the system is 'Monica Lewis', a new subfolder '\\Server\Attachments\Monica Lewis' would be created automatically and any detached attachments by that user would be stored on this particular subfolder.

b) Follow Outlook folders hierarchy: If this option is enabled, the add-in will output the detached files into subfolders similar to hierarchical ordering of the Outlook folder. For instance, if the email is located in the personal Inbox (*MonicaLewis@assistmyteam.local > Inbox*) folder, the attachments from that email will be detached to folder path similar to '\\Server\Attachments\Monica Lewis\MonicaLewis@assistmyteam.local\Inbox'. Such dynamism provides for an organized way of storing and filing attachments in subfolders which is easier to navigate, find and access files quickly and intuitively.

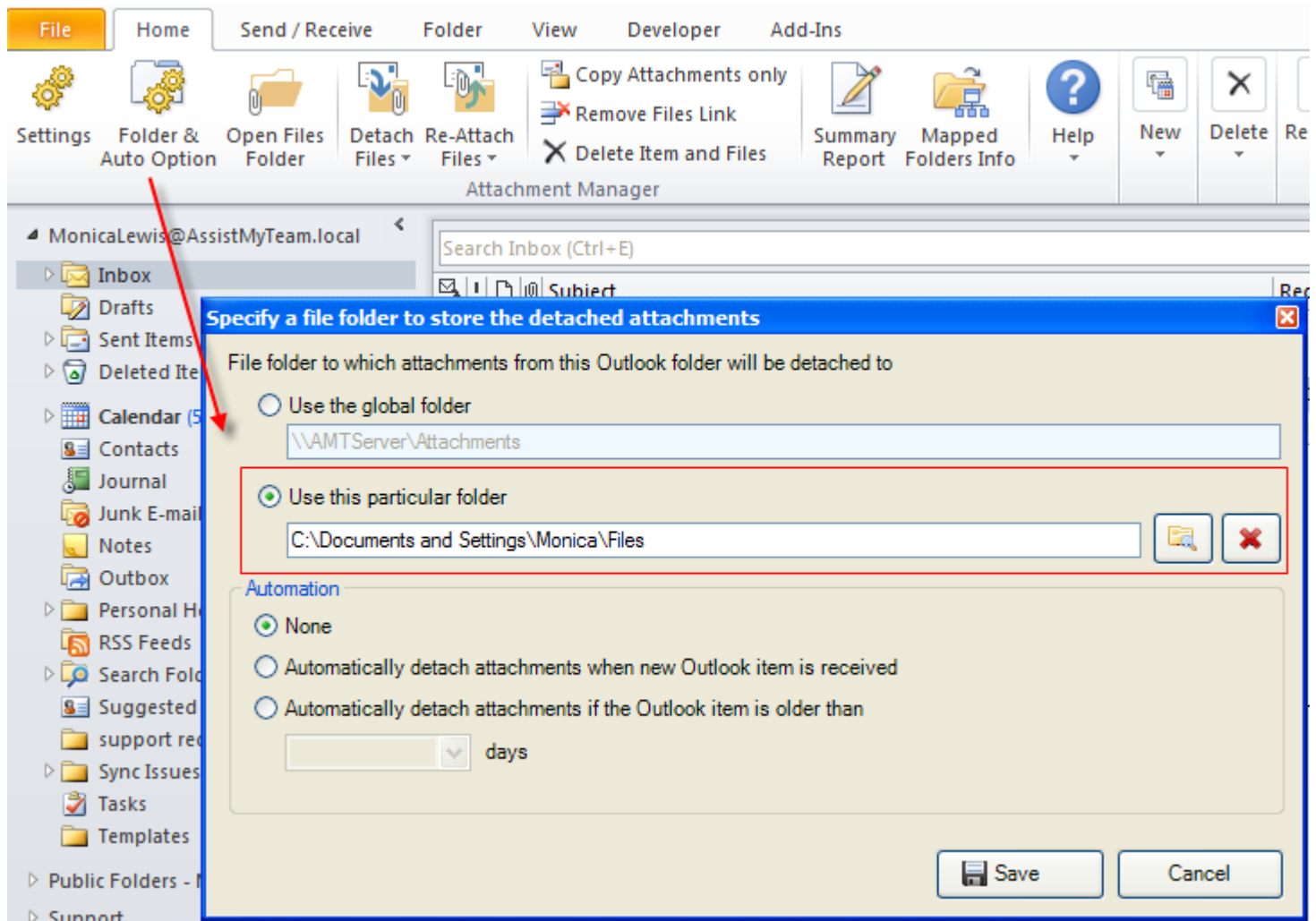
For example, here is a screenshot of an email in Inbox (*MonicaLewis@assistmyteam.local* > *Inbox*) after detaching the attachments:



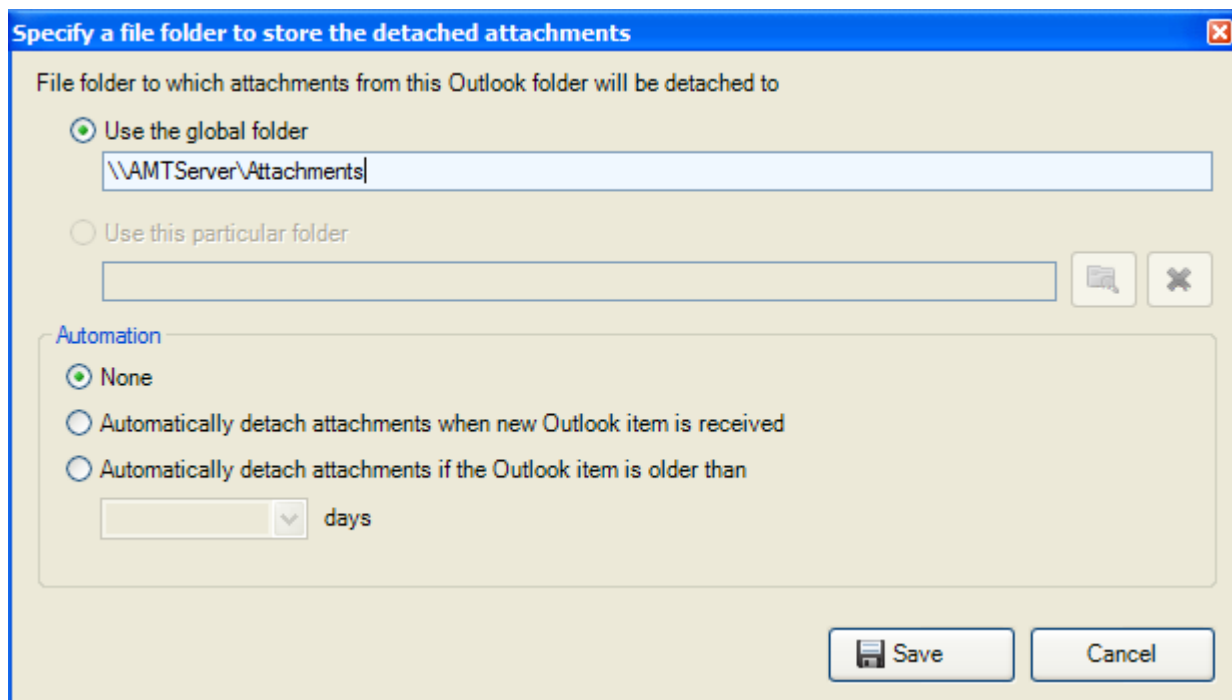
And here is the screenshot of the folder hierarchy that is dynamically created by the add-in to store the detached files.



c) **Allow user to define custom file repository folder for individual Outlook folder:** If this option is enabled, the add-in will provide individual user with support for specifying a separate attachment folder for each Outlook folder, even if the administrator had pushed a pre-configured Network folder folder. This allows for the user to specify a local folder to detach the attachments from emails for a particular Outlook folder, bypassing the admin's choice.

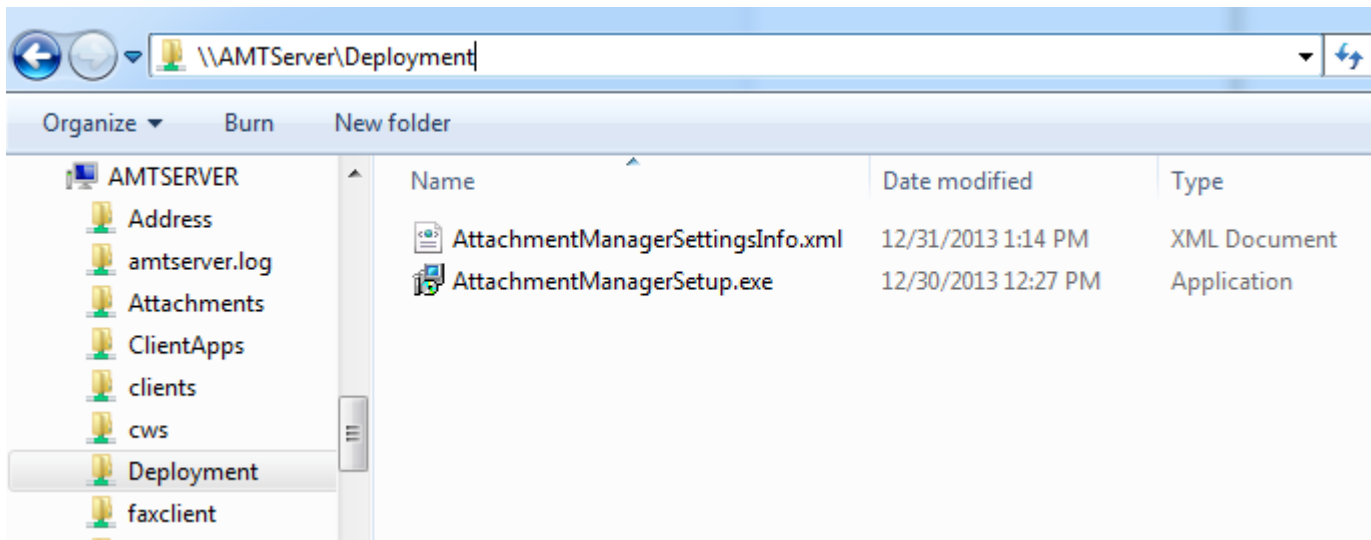


However, if this option is disabled, user will not be able to change the destination folder and instead will continue to use the admin specified network folder.



d) Overwrite Policy: You can choose what kind of overwrite policy would the add-in follow when it encounters that the detached file already existed in the particular network folder. By default, the 3rd option 'Keep the Original file and using random numbers to the original name, generate a new unique file' is enabled.

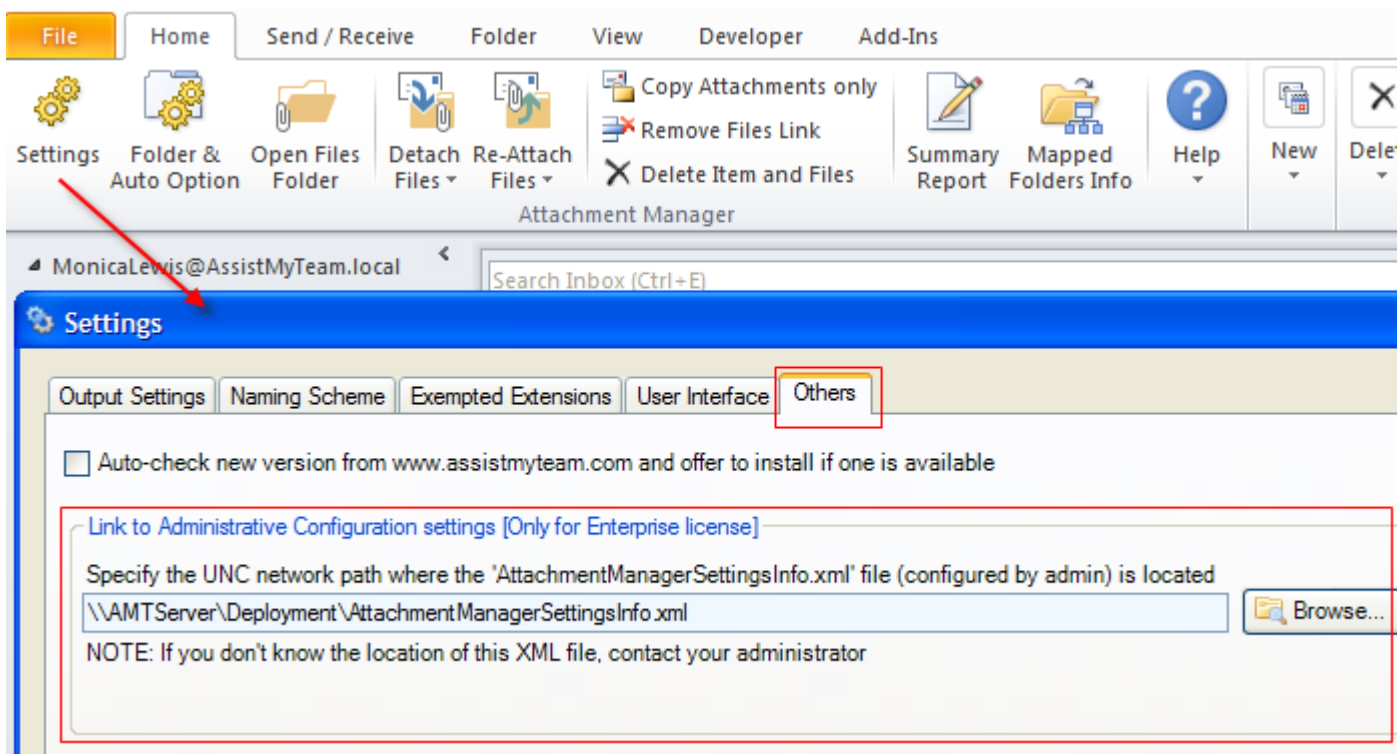
e) For deploying settings to other systems on the network: This is the network folder path where the admin preconfigured settings and enterprise license are stored in the form of a XML file '*AttachmentManagerSettingsInfo.xml*'. And the installation setup file '*AttachmentManagerSetup.exe*' for Attachment Manager should be placed in the same folder as this XML file for pushing the pre-configured settings and license to other systems. This means, individual user needs to run the '*AttachmentManagerSetup.exe*' directly from this network folder to install Attachment Manager add-in to their respective system. And only this way, the pre-configured settings and license set by the administrator will be inherited to the local system automatically without any additional steps.



Alternatively, you can also distribute the setup.exe along with the XML file (say in a zip file) to each user. And user can then extract both these files to a local folder and the run the setup to install Attachment Manager on his/her system. And this technique will also apply the admin pre-configured settings and license to that system automatically.

In a nutshell, as long as the setup.exe can access the XML file '*AttachmentManagerSettingsInfo.xml*' in the same directory, the pre-configured settings/license would be pushed to the current machine automatically when the add-in is installed.

What if the user had already installed Attachment Manager add-in without the presence of '*AttachmentManagerSettingsInfo.xml*'? In this case, the user needs to go Outlook > Attachment Manager Toolbar > Settings panel > Others tab, and feed the direct UNC network path of the '*AttachmentManagerSettingsInfo.xml*'. Doing so, the add-in would inherit and apply the pre-configured settings/license to the local system.



This is how the settings panel on the user's Attachment Manager add-in would look when the pre-configured settings and license is pushed to other systems:

The screenshot shows the 'Settings' dialog box with the 'Output Settings' tab selected. The 'Attachment Repository Folder' is set to '\\AMTServer\Attachments'. The 'Follow Outlook folders hierarchy' checkbox is checked, and 'Allow custom file repository folder for individual Outlook folder' is unchecked. Under 'OverWrite Policy', the option 'Keep the original file and using random numbers to the original name, generate a new unique file' is selected.

The screenshot shows the 'Settings' dialog box with the 'Naming Scheme' tab selected. The 'Naming Scheme for detached File' is set to 'Received Date (yyyy.mm.dd_hh.mm.ss) + Attachment name'. The 'Link Location' is set to 'Top'. The 'Attachment Reference Link' options are 'Show the attachment name only' (selected) and 'Show File Size' (checked). Under 'Optional Links to Embed', 'Embed Mac friendly path' and 'Embed HTTP friendly path' are unchecked. The 'Web URL of the folder' field is empty, and the 'Only embed Mac/HTTP path on automatic detachment' checkbox is unchecked.

Notice that, once the pre-configured settings are applied to the Attachment Manager add-in installed on the local system, the user can't change or overwrite those settings from the settings panel. This way, administrator can make sure the Attachment Manager add-ins on all systems behave and operate in the same way.

You will find additional settings under the '**Naming Scheme**' and '**Extensions**' tabs that you can configure and push to other systems.