

# **Mail2Innovator**

## **Installation and User Guide**

## Table of content

1. Introduction .....	3
2. Installation .....	4
2.1. The Innovator file import.....	4
2.2. The IMAP server .....	5
2.2.1. Start the Mail2InnovatorSetup.msi.....	5
2.2.2. Choose installation folder and user .....	6
2.2.3. Innovator server and database.....	7
2.2.4. Confirm installation.....	8
2.3. Uninstall .....	8
3. Administration .....	9
3.1. Setting up IMAP folders.....	9
3.2. Setting up permissions on the folders.....	10
3.3. Adding the server to an e-mail client .....	11
3.4. How to transfer e-mails to the Innovator .....	12
3.5. Reply-Feature .....	13

## **1. Introduction**

Mail2Innovator is an open solution to transfer e-mails from any e-mail client supporting the IMAP protocol, to the Aras Innovator server.

The Mail2Innovator solution contains two main components. The first component is the IMAP server. This server acts as a gateway between the e-mail clients and the Aras Innovator server. For the connection between your e-mail account and the IMAP server, you just use the IMAP server as an incoming e-mail server.

The second part of the Mail2Innovator solution are the Aras Innovator item types.

Innovator e-mails can be handled as any other Item in the Aras Innovator. They might be linked to parts or any other item of your choice. By default, the e-mail object item type is not linked to any other objects, but it is easy to adapt the e-mail item type in Aras Innovator to your business needs.

It is possible to transfer the Innovator e-mails back to the email client by using the Reply-Feature.

## 2. Installation

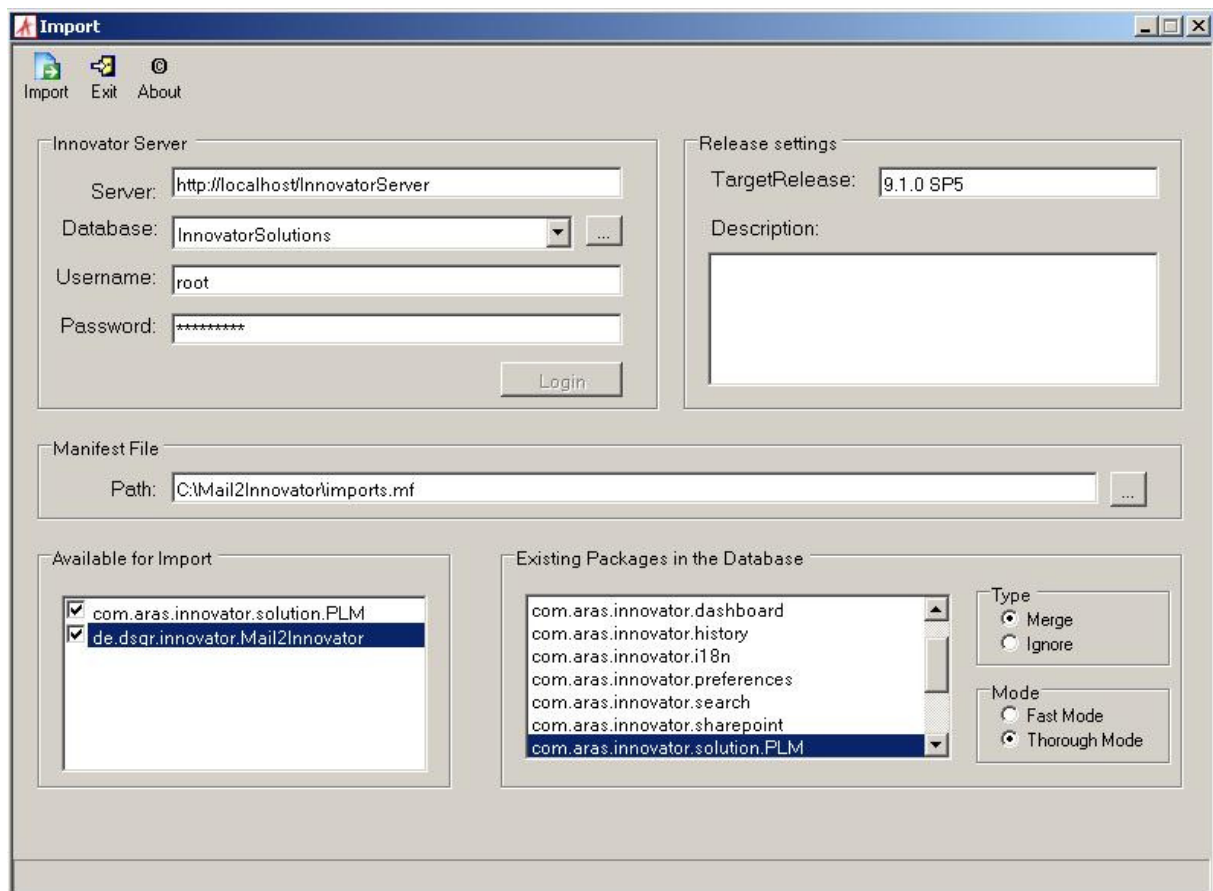
The installation is separated into two parts. The Mail2Innovator package import and the IMAP server installation.

### 2.1. The Innovator package import

The import tool from Aras should be used to import the Mail2Innovator packages. Open the import tool and select the packages:

- ☐ de.dsqr.innovator.Mail2Innovator
- ☐ com.aras.innovator.solution.PLM

Keep in mind that the PLM package is slightly modified, so make sure that only a merge is done with the import tool.



List of imports:

- Mail2Innovator\ Mail2Innovator \Import\Action\ DsqrEmailReply.xml
- Mail2Innovator\ Mail2Innovator \Import \FileType\ MHTML.xml
- Mail2Innovator\ Mail2Innovator \Import \Form\ Dsqr\_EmailFolder.xml
- Mail2Innovator\ Mail2Innovator \Import \ItemType\ Dsqr\_EmailFolder.xml
- Mail2Innovator\ Mail2Innovator \Import \Method\ DsqrEmailReply.xml
- Mail2Innovator\ Mail2Innovator \Import \Method\ DsqrRunEmailReply.xml
- Mail2Innovator\ Mail2Innovator \Import \ RelationshipType\  
Dsqr\_EmailFolder\_Document.xml
- Mail2Innovator\ PLM \Import\Form\ E-Mail Document.xml
- Mail2Innovator\ PLM \Import\ ItemType \ Document.xml
- Mail2Innovator\ PLM \Import\Sequence\ doc\_nr.xml

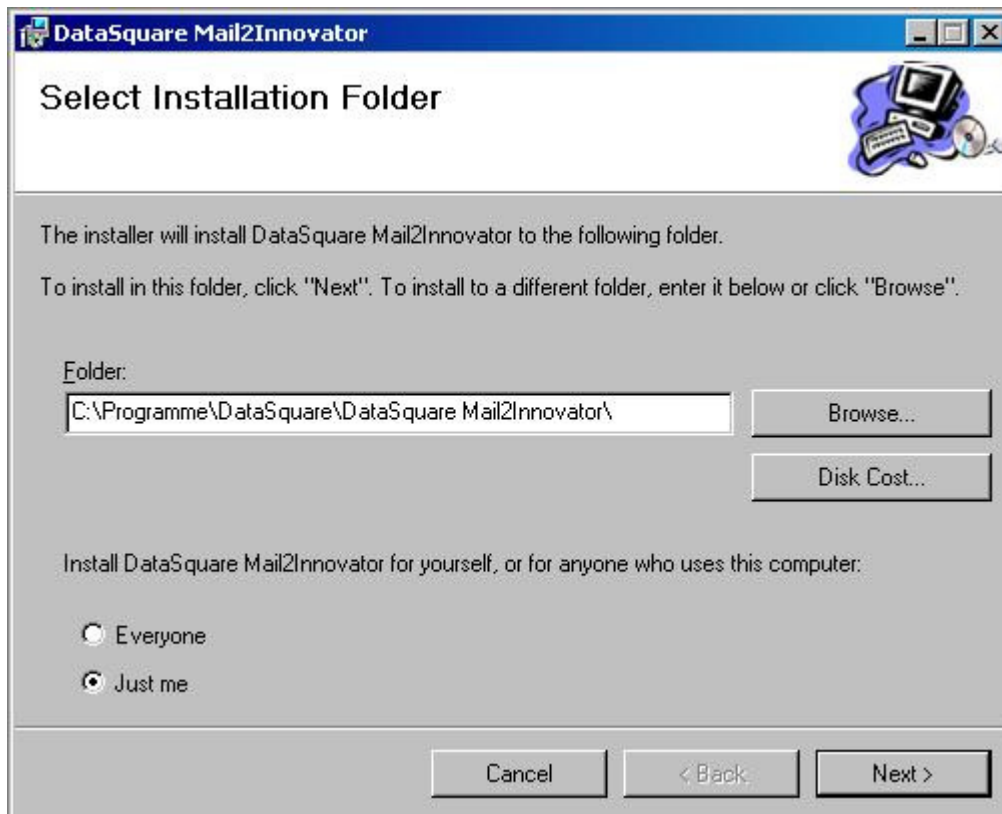
## 2.2. The IMAP server installation

The IMAP server may be installed on your Innovator server, but it can also be installed on every server inside the LAN. It is a windows service and starts automatically on startup.

### 2.2.1. Start the *Mail2InnovatorSetup.msi*

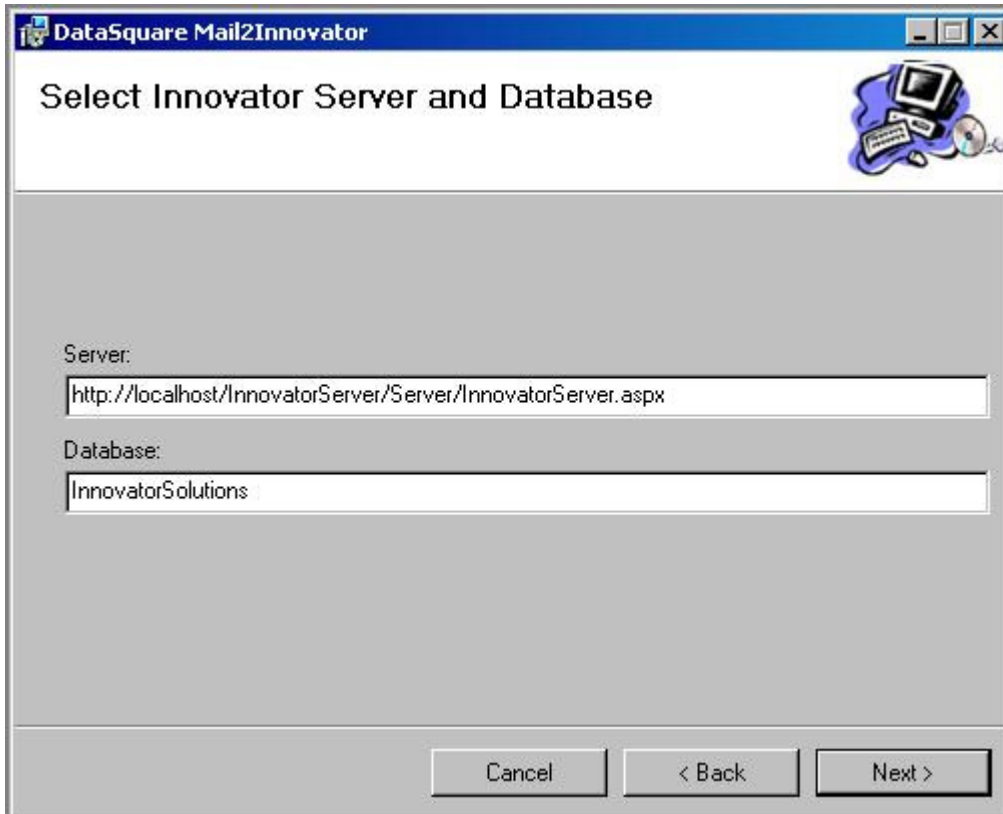


### 2.2.2. Choose installation folder and user



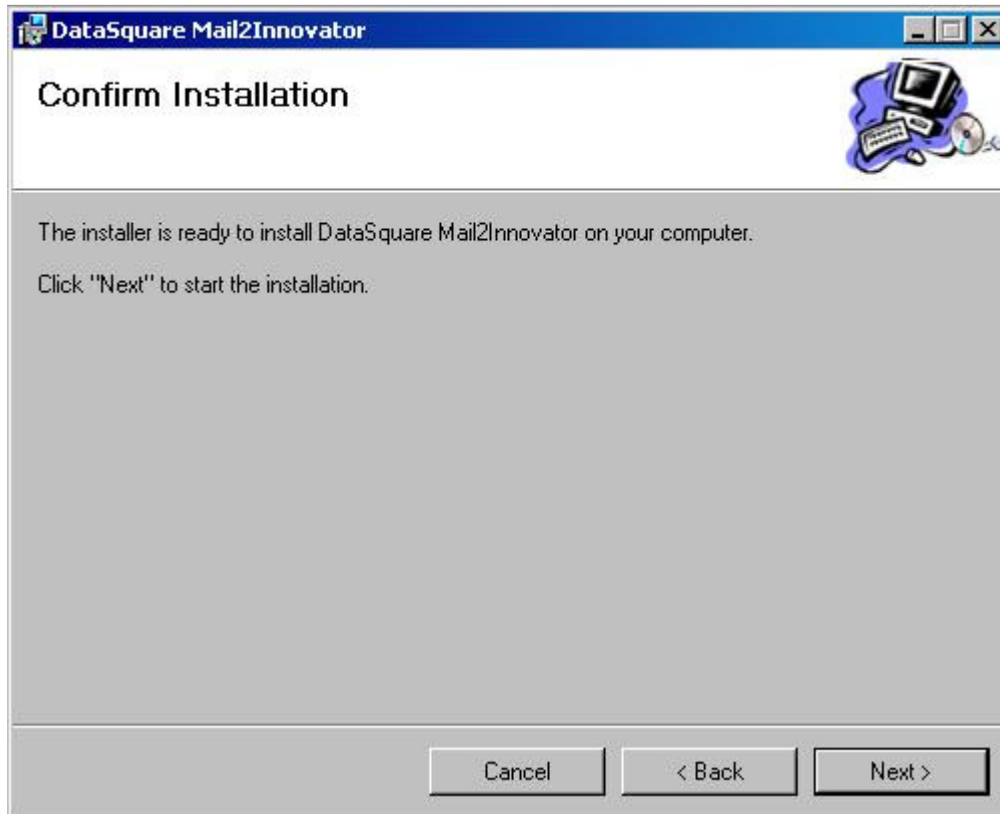
### **2.2.3. Innovator server and database**

Choose the Innovator server and the database (make sure this is the same, where the packages have been imported)



The screenshot shows a Windows-style dialog box titled "DataSquare Mail2Innovator". The main heading inside the dialog is "Select Innovator Server and Database". In the top right corner of the dialog, there is a small icon depicting a computer monitor, a keyboard, and a CD-ROM. The dialog contains two text input fields. The first field is labeled "Server:" and contains the text "http://localhost/InnovatorServer/Server/InnovatorServer.aspx". The second field is labeled "Database:" and contains the text "InnovatorSolutions". At the bottom of the dialog, there are three buttons: "Cancel", "< Back", and "Next >".

#### **2.2.4. Confirm installation**



If the IMAP server service is correctly installed, a service called 'DataSquare Mail2Innovator' should appear in the Services tab of the Windows Administrative Tools.

### **2.3. Uninstall**

The 'install or remove programs' tool in the windows control panel should be used to uninstall the IMAP server service.



### 3. Administration

#### 3.1. Setting up IMAP folders

An entry called 'Email Folder' will be created during the package import and can be found in the Administrators TOC. All Folders added to this entry, will be shown in the e-mail clients of the users (see 3.2). To use the Reply functionality it is required to create a folder with the Name 'Reply'.

The screenshot displays the Aras Innovator web application in a Windows Internet Explorer browser. The left-hand navigation pane shows a tree structure under 'Administration', with 'Email Folder' selected. The main content area shows the details for the 'Email Folder' entry, including its creation and modification dates and user. Below this, a table lists the contents of the 'Email Folder'.

Name	created_on [...]	created_by_id [...]
Projects	1/12/2010 3:12:10	Super User
Reply	1/15/2010 11:05:50	Super User

An inset window shows the 'Email Folder - Projects' view, where the 'Permissions' menu is open, displaying options like 'View', 'Create Private', and 'Administrators [Default]'.



### 3.2. Setting up permissions on the folders

This should be done by adding a private permission to each folder separately. If a user has access-rights to a folder, he will see this folder in his e-mail client. Keep in mind there is no real existing folder in the Innovator. All e-mails are stored in Documents TOC and the folder name is stored as a property of the e-mail document and may be used for advanced business logic (e.g. create relationships automatically when a special folder is used).

### 3.3. Adding the server to an e-mail client

This solution should work on any e-mail client that supports the IMAP protocol e.g. Outlook.

**Neues E-Mail-Konto hinzufügen**

**Internet-E-Mail-Einstellungen**  
Alle Einstellungen auf dieser Seite sind nötig, damit Ihr Konto richtig funktioniert.

**Benutzerinformationen**

Ihr Name: Testi Tester

E-Mail-Adresse: Testi.Tester@datasquare.de

**Serverinformationen**

Kontotyp: IMAP

Posteingangsserver: dsqr.local.Mail2InnovatorSrv

Postausgangsserver (SMTP): dsqr.local.exchange

**Anmeldeinformationen**

Benutzername: TTester

Kennwort: \*\*\*\*\*

☒ Kennwort speichern

☐ Anmeldung mithilfe der gesicherten Kennwortauthentifizierung (SPA) erforderlich

**Kontoeinstellungen testen**

Wir empfehlen Ihnen, das Konto nach dem Eingeben aller Informationen in diesem Fenster zu testen, indem Sie auf die Schaltfläche unten klicken (Netzwerkverbindung erforderlich).

Kontoeinstellungen testen ...

Weitere Einstellungen

< Zurück Weiter > Abbrechen

On other e-mail clients it will look different, but the base information will remain the same:

Account type: IMAP

Incoming server: The machine with the IMAP server is installed.

Outgoing server: standard smtp-server

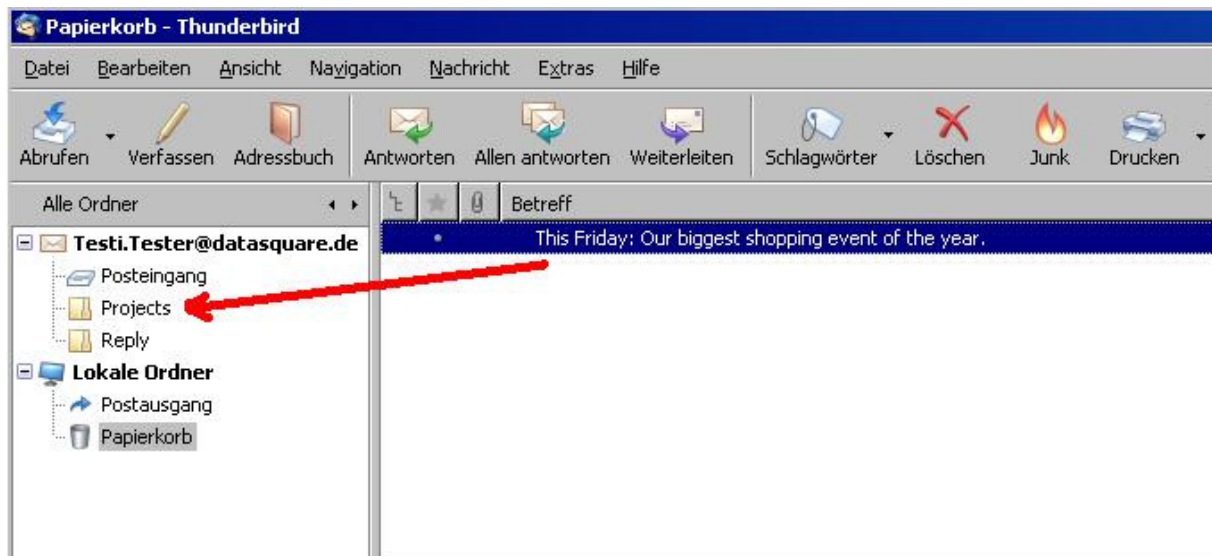
Username and password: Innovator login and password

### 3.4. How to transfer e-mails to the Innovator

To transfer an e-mail to the Innovator it can be moved or copied to an Innovator folder on the e-mail client.

If an e-mail is moved into an Innovator-Folder it will be deleted from the e-mail client after it was successfully transferred to the Innovator.

If the e-mail shall remain in the e-mail client, it has to be copied to the Innovator-Folder instead of moving it.



### 3.5. Reply-Feature

Once e-mails are stored in the Innovator it might be needed to send a reply to an e-mail. There exists a feature to transfer any e-mail back to the mail client. The change button can be used to mark an e-mail for reply.

The screenshot shows the 'Document' details for document 7803 in the DataSquare Innovator web interface. The interface is displayed in a Windows Internet Explorer browser window. The document is of type 'E-Mail' and was created on 1/12/2010 by 'tester deluxe'. It was modified on 1/15/2010 by 'Super User'. The document is locked by 'A' and is in the 'Preliminary' state. The 'Sent By' field contains 'News@InsideApple.Apple.com;'. The 'Date' field contains '11/24/2009'. The 'CC' field is empty. The 'Sent To' field contains 'Daniel.vomBauer@meais.de;'. The 'E-Mail' field contains a URL: '3b862edd-7006-463a-a880-0b0469502547.mhtml'. The 'Subject' field contains 'This Friday: Our biggest shopping event of the year.'. The 'Description' field contains 'leer'. The 'Folder' is 'Projects'. The 'Reply' checkbox is checked and highlighted with a red circle, and the 'Change' button is next to it. The bottom of the interface shows a 'Ready' status bar and a message '0 Items found.'.

If an e-mail is marked for reply, it will be transferred to the Reply-folder of the e-mail client for further processing.

