

Mail2Innovator

Installation and User Guide

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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.

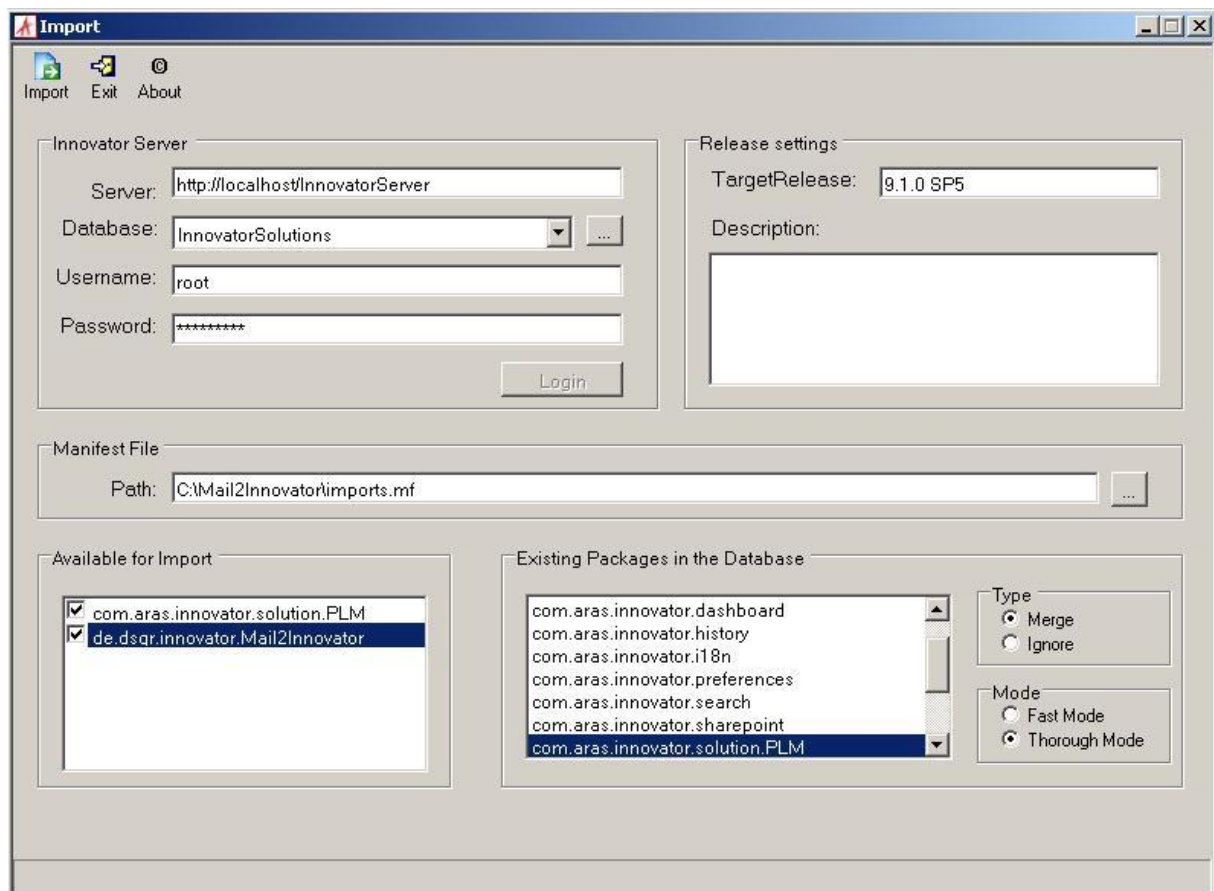
2.1. The Innovator package import

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

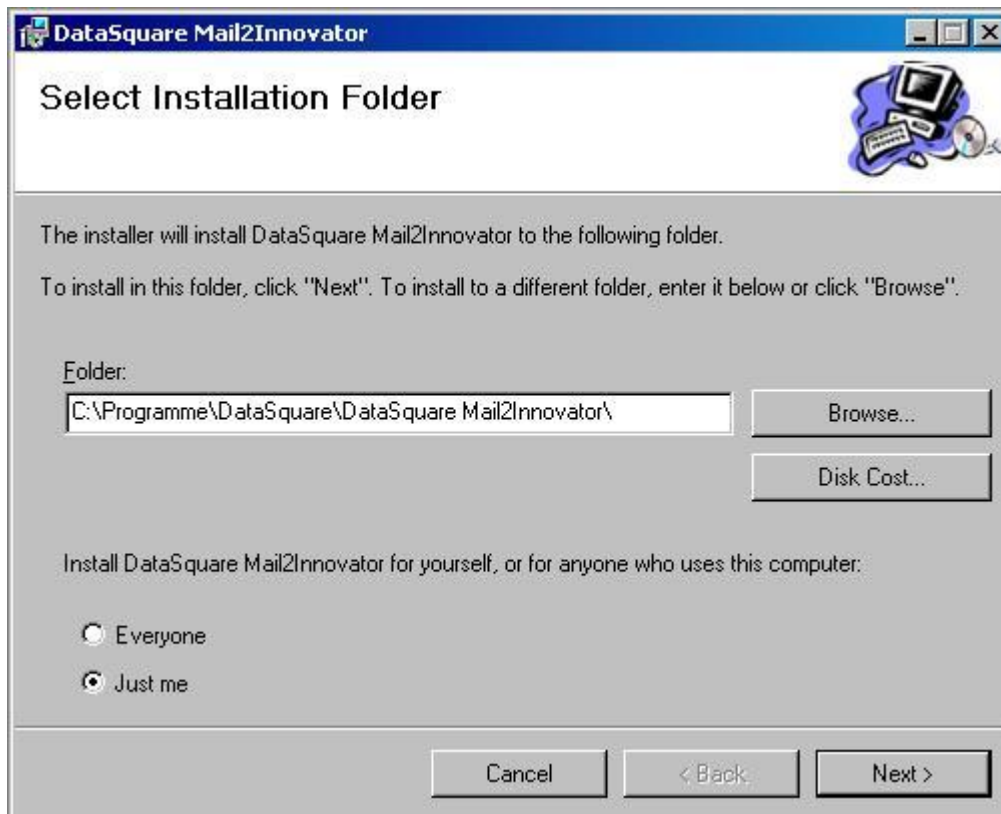
2.2. The IMAP server installation

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*

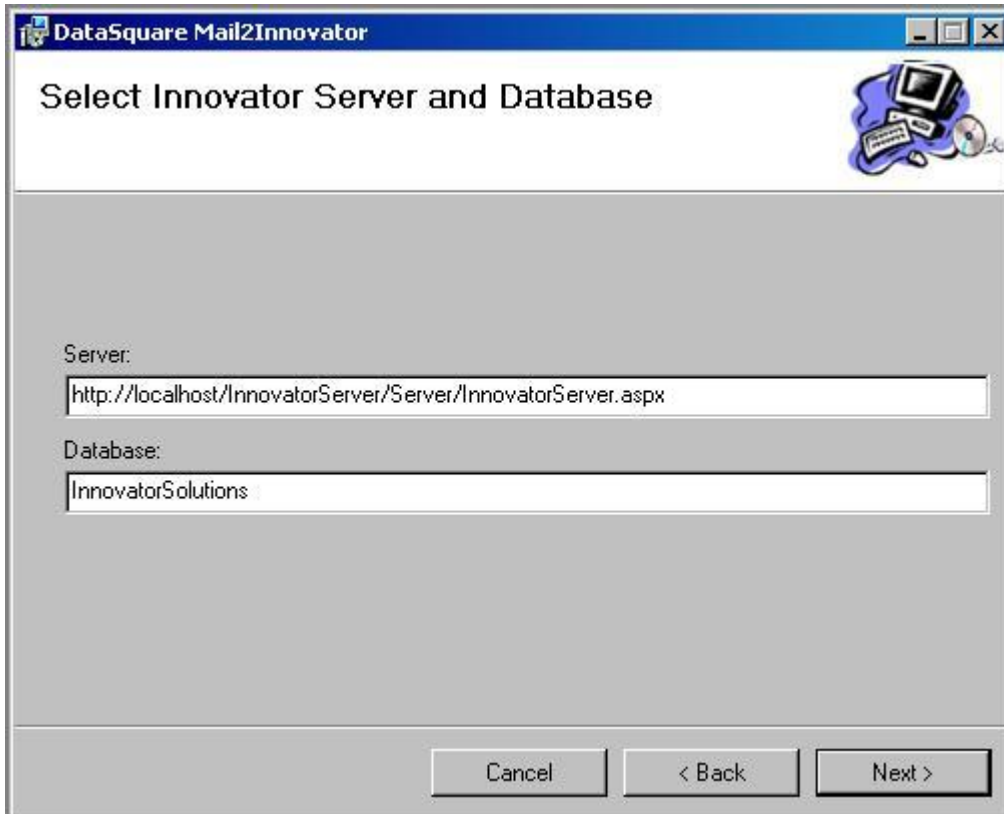


2.2.2. Choose installation folder and user



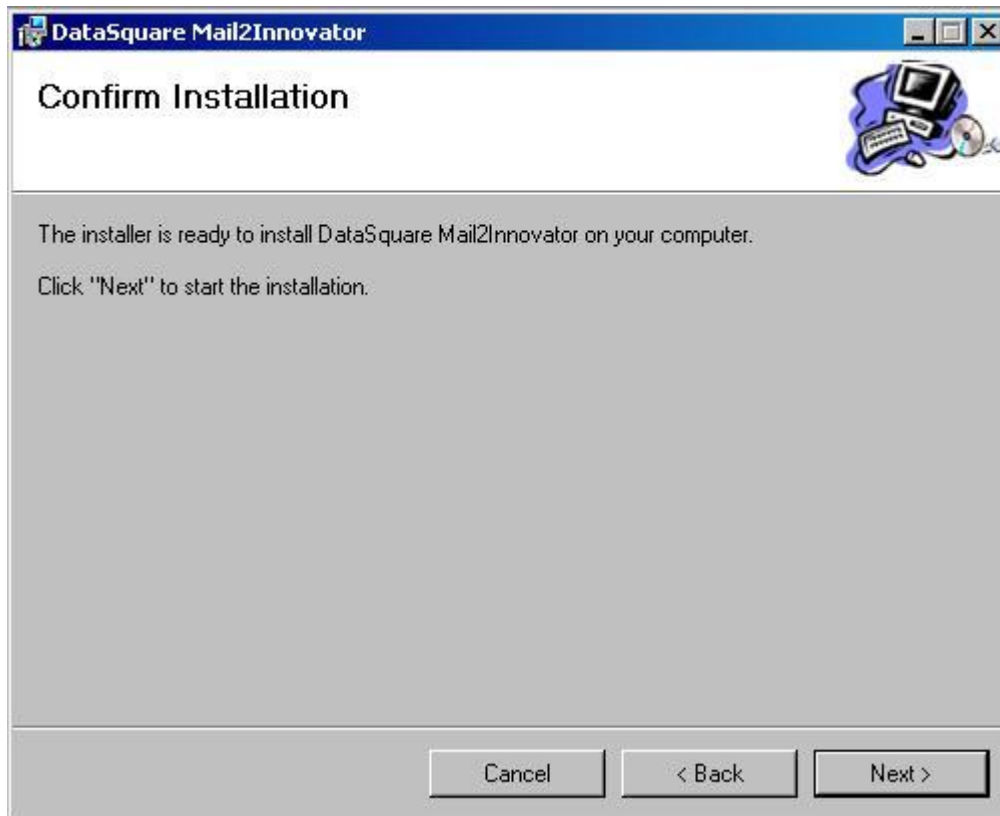
2.2.3. Innovator server and database

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'.

http://localhost/ - Aras Innovator - Windows Internet Explorer

aras INNOVATOR®

File Edit View Search Actions Reports Tools Help

Administration

- Actions
- Calendars
- Dashboards
- Database Upgrades
- Email Folder**
- E-Mail Message
- Files
- FileTypes
- Forms
- Grids
- Identities
- ItemTypes
- Languages
- Life Cycle Maps
- Lists
- Locales
- Methods
- PackageDefinitions
- Permissions
- Preferences
- RelationshipTypes
- Reports
- Revisions
- Saved Searches
- Sequences
- SharePoint Libraries
- SQLs
- Users
- Variables

Email Folder

Created By: **Super User**
 Created On: **1/12/2010**
 Modified By: **Super User**
 Modified On: **1/15/2010**
 Locked By: **Super User**
 Major Rev: **A**
 Generation: **1**
 State:

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

http://localhost/ - Email Folder - Projects - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Permissions

- View
- Create Private
- ☒ Administrators [Default]

History

Revisions

Where Used

Structure Browser

Workflow

LifeCycle

Documents

Actions Pick Related

Document Number	Revision	Name	Type

Ready 0 Items found. aras INNOVAT



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

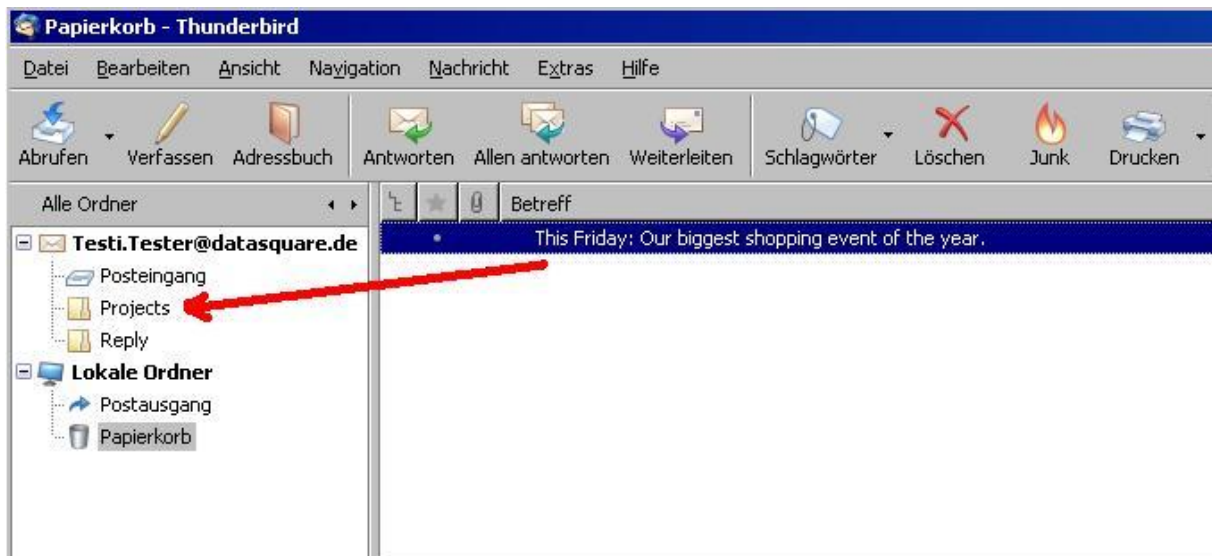
Username and password: Innovator login and password

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 a web browser window displaying the DataSquare Innovator interface. The main content area shows a document titled 'Document - 7803 (read only)'. The document details include:

- Document Number:** 7803
- Name:** (empty field)
- Type:** E-Mail
- Sent By:** News@InsideApple.Apple.com;
- Date:** 11/24/2009
- CC:** (empty field)
- Folder:** Projects
- Sent To:** Daniel.vomBauer@meais.de;
- E-Mail:** 3b862edd-7006-463a-a880-0b0469502547.mhtml
- Subject:** This Friday: Our biggest shopping event of the year.
- Description:** leer

On the left side, there is a 'Document' section with metadata:

- Created By: tester deluxe
- Created On: 1/12/2010
- Modified By: Super User
- Modified On: 1/15/2010
- Locked By:
- Major Rev: A
- Release Date:
- Effective Date:
- Generation: 3
- State: Preliminary

In the top right corner of the document details, there is a 'Reply' checkbox (checked) and a 'Change' button, which are circled in red. Below the document details, there is a 'Files' section with a 'Changes' tab and a 'Simple Search' field. The bottom status bar shows 'Ready' and '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.

