Operation PRO.FILE Mail Connector Lotus Notes

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PROCAD

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Table of contents

About this manual

This PRO.FILE manual uses various signs and icons in order to guarantee a good readability and comfortable handling.

Step-by-step instructions:

For quicker finding within the manual, step-by-step instructions are marked with a margin heading.

Menu sequences and function calls
Menu sequences and function calls explained in this manual are marked in bold and in quotation marks.

Example:
"**File**" => "**New**" => "**Document description**"

Buttons and keys
Keys and buttons are highlighted by angle brackets.

Example:
"Confirm with <**OK**>."

Notes and warnings
To highlight special information the following icons are used:

Function call:

"PRO.FILE" => "Extras" => "Options" => "Performance"

Example:

Boxes marked with this icon give subject-relevant examples for the usage of command lines, configuration strings and other software-relevant entries.

Note:

Boxes marked with this icon contain useful hints on the operation, configuration or installation of the PRO.FILE software.

Attention:

All information given in these boxes is very important and should be read carefully! Non-observance of these hints may lead to wrong functioning, display problems or other negative consequences.

Important notes:

The "stop sign" warns you of possible entry or operation errors, which may lead to loss of data!

Attention – Undo not possible:

All entries and configurations described in these boxes have to be made carefully, because they cannot be undone!

1 The PRO.FILE Mail Connector for Lotus Notes

E-Mails can trigger or even control business processes. They must therefore be distributed, made available and archived according to specified rules like any other business document.

The storage of e-Mails and their attachments in the document management system PRO.FILE advances the systemization of business processes and makes sure that e-Mails can be found and stored quickly and securely.

The PRO.FILE Integration in Lotus Notes is the tool for comfortable administration of incoming and outgoing e-Mails. By the integration of PRO.FILE and Lotus Notes, e-Mails and attachments are included in the overall document management and connected to other project- or product-related documents. The saving of e-Mails in PRO.FILE is made directly from the GUI of Lotus Notes. The format and structure of e-Mails remains intact when the document is saved in PRO.FILE.

Functions for incoming e-Mails

- Usage of the function "Save" for incoming e-Mails directly from the Lotus Notes GUI. When an e-Mail is saved, you can select, what is to be saved:
    - The e-Mail including the attachments
    - Only the e-Mails
    - Only the attachments
- Classification of the e-Mails according to the classification system for PRO.FILE documents.
- Automatic structuring according to the e-Mail contents.
- Attachments are stored as individual documents, and can thus be found independently from the E-Mail.
- Automatic transfer of recipient, cc recipients, sender, subject line and date into the document description fields in PRO.FILE.
- Reply to and forwarding of e-Mails stored in PRO.FILE via the corresponding functions in Lotus notes

Functions for outgoing e-Mails

- Usage of the function "Save and send" for outgoing e-Mails directly from the Lotus Notes GUI.
- Attachments are saved as separate documents in PRO.FILE.
- Attachment of PRO.FILE documents in the e-Mail via the function "Attach file".

E-Mail Management within the workflow processes

- Sending of documents saved in PRO.FILE via the function "Notify" to internal and external recipients.
- Sending and receiving of e-Mails in the workflow context.

2   Operating the PRO.FILE Mail Connector for Lotus Notes

The following sections provide general information on how to operate the Mail Connector

2.1   Functionality and requirements

PRO.FILE – Mail Connector for Lotus Notes makes it possible to systematize the information process within the workflow. This guarantees that e-mails are not lost along the way, that they are completely available, and that no recipient is left out.

It is furthermore possible to notify staff members who are not part of the respective workflow.

Objects are not sent as a copy, but as a reference. This is to ensure that anyone can always access the latest version.

The configuration guide contains information on how to specify the distribution list to which messages are to be sent when a certain status change occurs. You can predefine a standardized message text in the corresponding entry screen.

|	
	Note: E-mail addresses of the users
	In order for the involved users to be able to access the Mail Connector functionalities, it is necessary to set up an e-mail address in the user data of the PRO.FILE Management Console. Specify an e-mail address in the user data field **"E-Mail Address"**. Failure to do so will make it impossible to maintain a flow of information as part of the workflow and to manually specify recipients for ad-hoc notification. Please refer to the manual "Installation and administration PRO.FILE Mail Connector Lotus Notes".

2.2   HTML-Mail

As of release 5 of Lotus Notes, it is possible to send e-mails in HTML format. Previously, PRO.FILE could only send e-mails in text format. The availability of the HTML format now allows you to format the design of your e-mails.

HTML format gives you, among others, the following functionalities:

- Tabular representation of data

- Different fonts

- Different font sizes

- Different highlight colors

HTML e-mails are sent in the same manner as e-mails in text format. See the next chapter for more details.
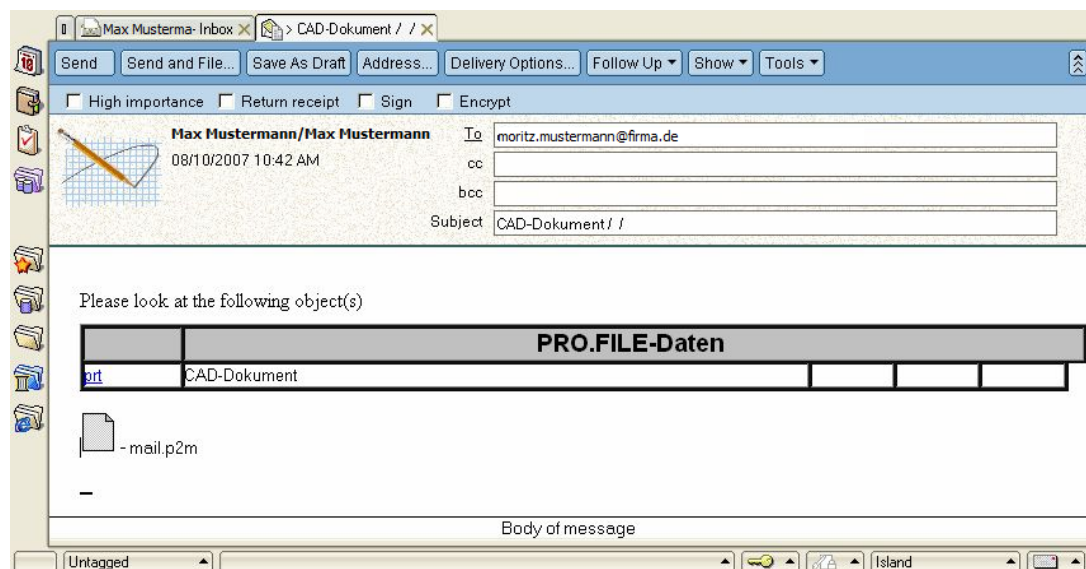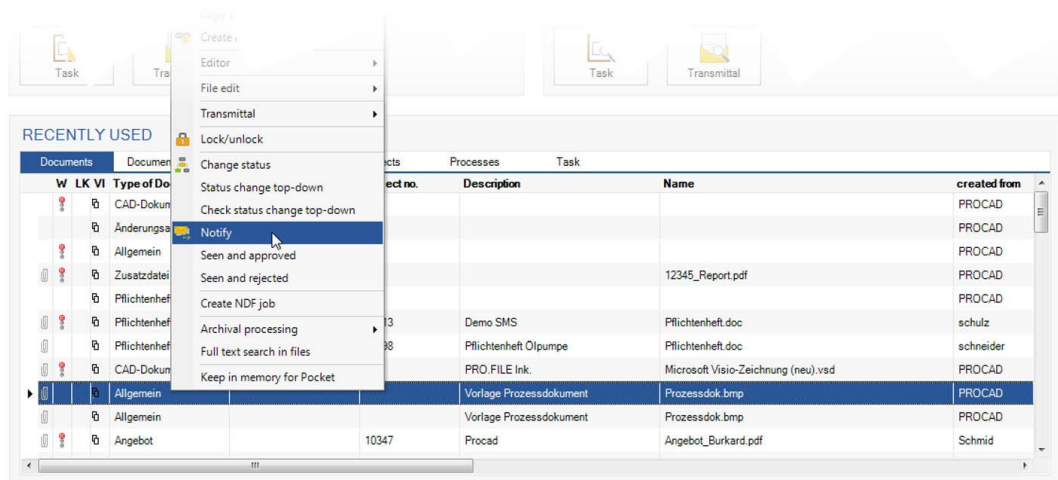
2.3   Sending information

The **"Notify"** function in the PRO.FILE **"Edit"** menu allows you to include objects as a referenced attachment to your e-mail and to send it to other users. .

2.3.1   Calling the "Notify" function "

In order to notify users of objects, highlight the object descriptions that are to be sent. Then select **"Notify"** from the **"Edit"** menu. Alternatively, you can also access the "Notify" function by right-clicking your mouse.

When sending messages to internal and external partners, the following conditions apply: The Mail Connector is used for sending internal information. The Lotus Notes integration is required for sending external information. Here, two e-mails are sent: an internal (p2m file as a copy of the original file) and an external e-mail (here, the file that is attached to the document master is sent out).

## 2.3.2   Specifying the internal and the external recipient

PRO.FILE will open a dialog that lets you specify one or more PRO.FILE users in the "Internal Recipients" field or select a recipient from the drop-down menu. Multiple recipients must be separated with commas. It is possible to select multiple users in one step - press and hold <Ctrl> to select multiple users. In the message body, you can include additional comments to complement the default entry "Please look at the following object(s)."..
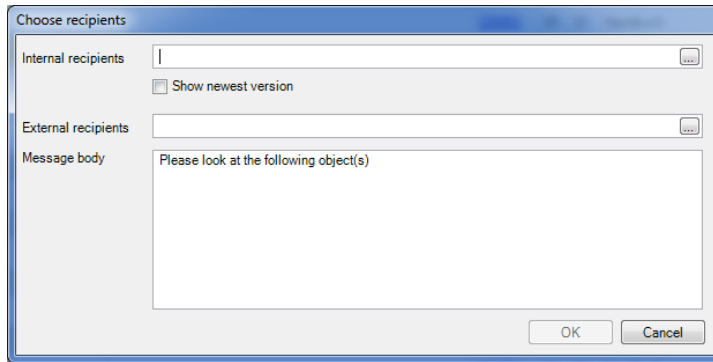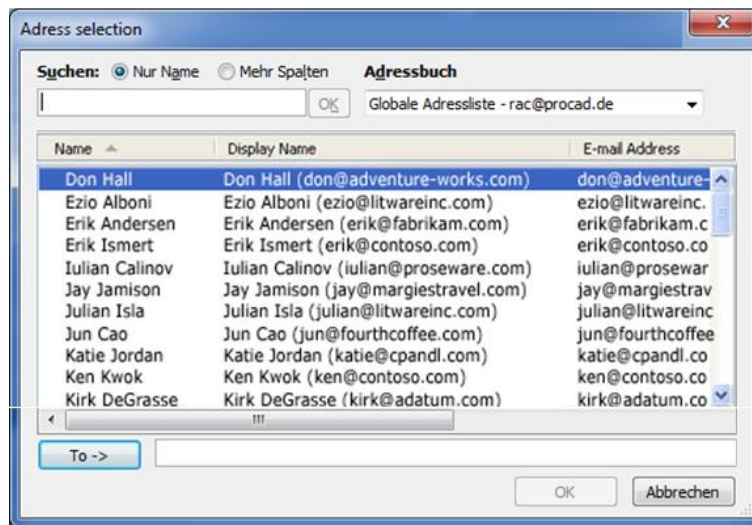
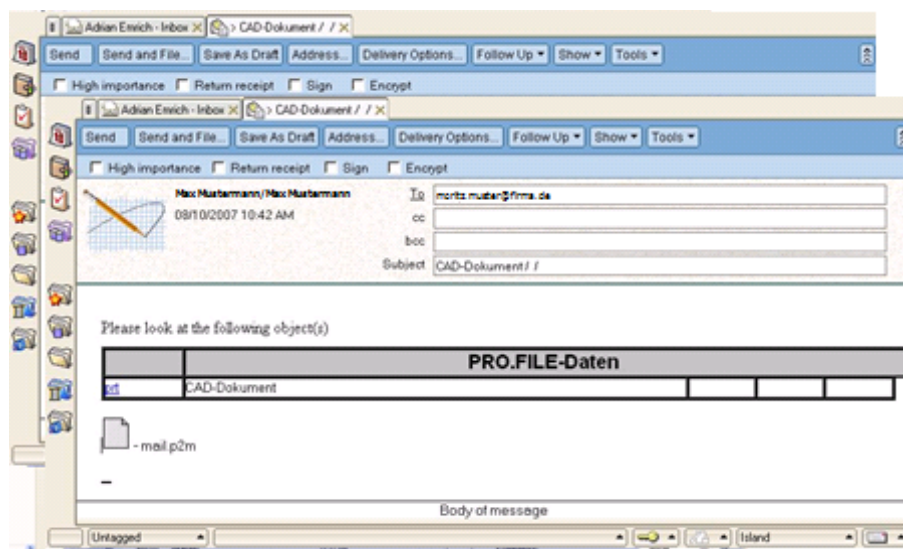Use the drop-down menu on the far right side to select the internal recipients from a list.

When **external recipients** are to be selected, the selection window of recipients looks as follows:
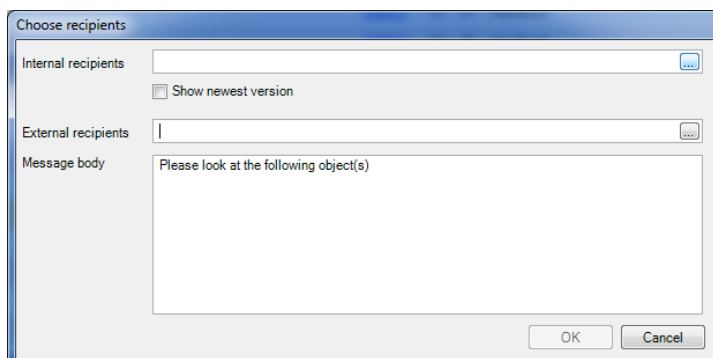
Here you can select your recipients from the list:

If internal and external recipients are notified simultaneously, two messages are generated:


The mail integration will now initiate the transfer of the data.

A window appears to notify the user that the mail integration is sending information to the mail system. In the mail system, you can further format the message if the messages are not sent automatically

2.3.3   Displaying and editing messages before they are sent

The information that is to be sent will be displayed in an e-mail form if the configuration allows these e-mails to be edited. If not, the e-mail will be sent without being displayed again
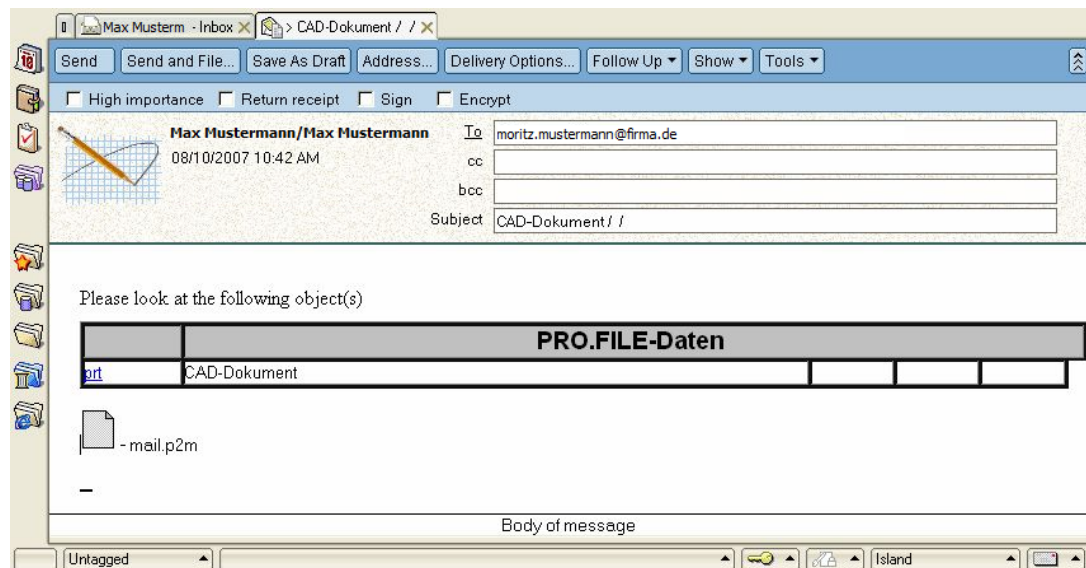
The e-mail form already contains the e-mail addresses of the selected recipients. Furthermore, the reference icon and the predefined message text with the ID number of the object(s) are displayed by default.

It is possible to view PRO.FILE files without having to install PRO.FILE on your computer. In that case, a link in the e-mail could look like this:

In order to receive this link, a FS Link server has to be installed on the server side. Please see the manuals "Installation PRO.FILE Server Components " and "Administration PRO.FILE".

PRO.FILE will now display the e-mail form before the e-mail is sent to give you the opportunity to edit the text that is to be sent.

The message can be supplemented with additional information in the message body.

Click the **<Send>** button in your mail system to send your message. The information will now be sent to the selected recipients.

If internal recipients are notified as described above, an entry is made in the **mail log** for the respective objects.

The mail log provides an overview of which internal recipient was notified, when, and with which message

The **status log** gives you an overview of the status of a document as well as information on which internal user was notified of status changes.

2.4   The flow of information in case of status changes

The PRO.FILE Mail Connector lets you define which user is to be automatically notified when a certain status change is made. It is also possible to automatically notify users when an object has arrived at a certain target status.

If the system was configured to provide automatic notifications for a certain status change (see the configuration guide), PRO.FILE will send a notification to all specified recipients when this status change occurs.

As soon as the last user on whom the final realization of the status change depends gives his or her approval for the status change, PRO.FILE will automatically initiate the sending of the notifications.

This user will receive the following message:
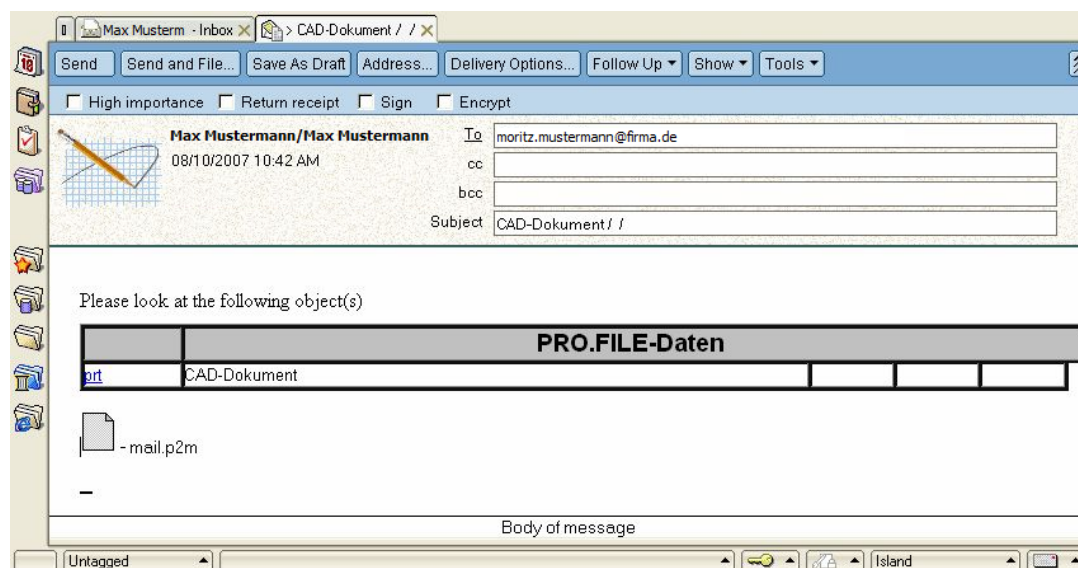
Here too, it is possible to view PRO.FILE files without having to install PRO.FILE on your computer. In that case, a link in the e-mail could look like this:

In order to receive this link, a FS Link server has to be installed on the server side. PRO.FILE will now display the e-mail form before the e-mail is sent to give you the opportunity to edit the text that is to be sent.

The e-mail form contains a reference icon for the sent PRO.FILE objects. Furthermore, the predefined message text, the ID number of the objects, as well as the source and target status are displayed. The sender can supplement this information if desired.

Confirm the content of the e-mail form by clicking **<Send>**. The message regarding the status change will now be sent to the specified recipients.

The following chapter provides information on how to receive and access these messages.

	Note: Status log
	After the message is sent, no further entry is made in the status log except for the one that is made when a status change occurs.

2.5   Receiving and accessing messages

Receiving messages

If PRO.FILE messages were sent using the "Notify" function or because of a status change, the selected recipients will receive a mail system notification that a message was received. However, in order for this to work, users need to enable the notification function in their e-mail systems. The received message can be accessed like any other e-mail.

Accessing messages

In the mail system, open the received message. In order to work with the PRO.FILE objects (part master data, CAD data, documents) that were included in the message as a reference, simply click on the PRO.FILE reference icon to activate it. PRO.FILE will be automatically started. The user may have to log on to PRO.FILE and will then be displayed a list of the objects that were included as a reference. The following requirements must be satisfied in order for the recipient to be able to view the respective objects:

- The recipient must have access to PRO.FILE and to the database in which the objects are stored. The recipient must have the appropriate rights to access the objects. The information process with PRO.FILE Mail does not affect the read and write rights of the individual users.

|	Attention: missing PRO.FILE relation
	If the recipient cannot open the e-mail or if it does not contain a PRO.FILE reference icon, then the PRO.FILE Mail Connector is not installed correctly on the recipient's computer. In this case, the "p2m" files have to be associated with "showdata.exe". Contact your system administrator if necessary.

> **Note: linked documents**
>
> Documents that are displayed with the link cannot be modified.

2.6   Seen and approved

After viewing the object, the user can decide what to do with it. He or she highlights the respective objects and selects **"Seen and approved"** from the **"Edit"** menu. An entry is made in the status log that indicates that the user has granted approval for this object.
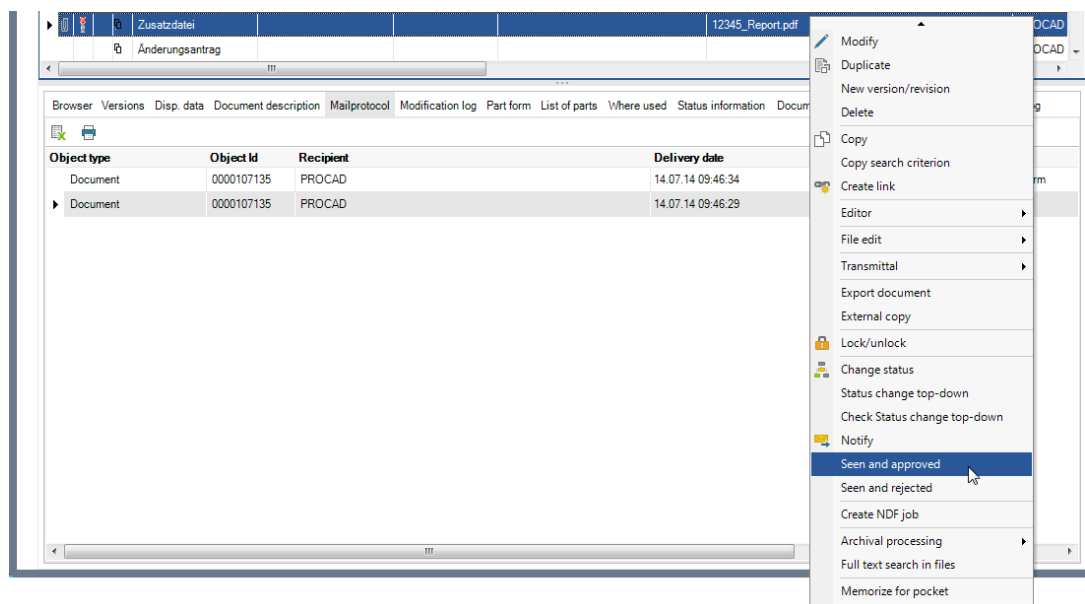
2.7   Seen and rejected

If the user decides to deny approval for the respective object, he or she has to select "Seen and rejected" from the "Edit" menu. An entry is made in the status log that indicates that the user has denied approval for this object.
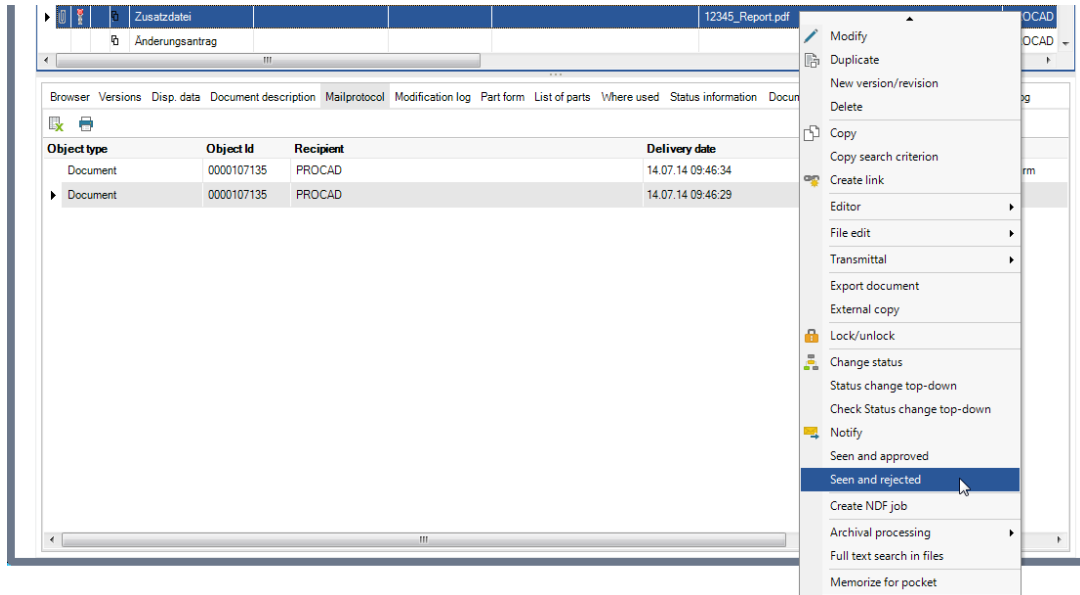
Note: consequences for a status

The notification of a user using the **"Notify"** function or following a status change does not affect the status of an object. If a user is notified and he or she responds with **"Seen and approved"** or **"Seen and rejected",** this will only result in an entry in the status log. A status change will neither be reversed nor will the user who has sent the message be notified that the recipient has denied approval for the object.

The following example shows the entries that PRO.FILE makes in the status log:

3 Operation of the integration PRO.FILE – Lotus Notes

With the integration PRO.FILE – Lotus Notes sent and received e-Mails and e-Mail drafts can be saved in PRO.FILE directly from the e-Mail program. The functions for saving and sending are integrated into the menu bar of the e-mail program.
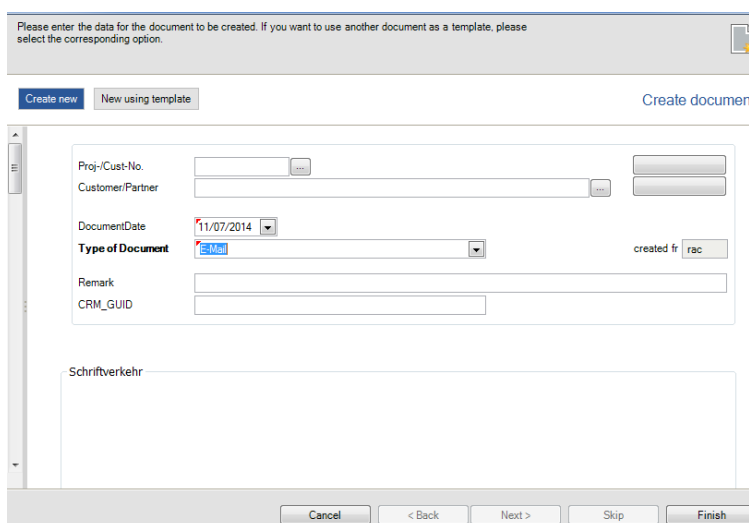
3.1 Saving and sending new e-mail messages in PRO.FILE

In order to send an e-mail and to simultaneously save it to the PRO.FILE database, you can choose between **"PRO.FILE Send and…"** => **"Check-in"** or **"PRO.FILE Send and…"** => **"Attach-in"** in the e-mail message in the Lotus Notes client.
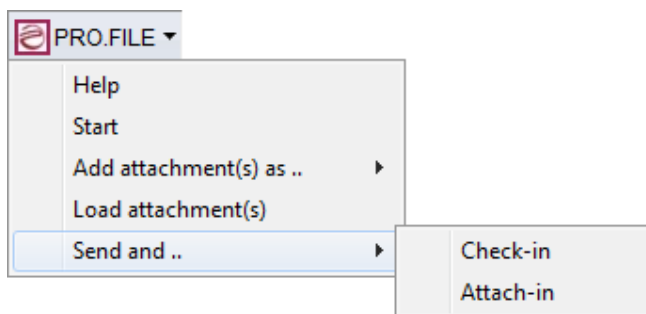
"PRO.FILE Send and…" => **"Check-in"** will create a new document structure in PRO.FILE, while **"PRO.FILE Send and…"** => **"Attach-in"** will use an existing structure to save the message.

This will open a dialog box in which you can provide the information necessary for saving the e-mail or select a document structure if you chose to attach the e-mail to an existing structure

Confirm your entries with **<Finish>**. Once the e-mail was saved in PRO.FILE, the Lotus Notes window will open again and the sent and saved e-mail will be closed.

Click **<Cancel>** to exit without saving. A message window will open to inform you that the operation was canceled.

3.2 Attaching PRO.FILE documents to an e-mail

In order to attach a PRO.FILE document to a newly created e-mail message, use the " PRO.FILE" => "**Add attachment(s) as ..**" => "**File(s)**" function in the e-mail window:
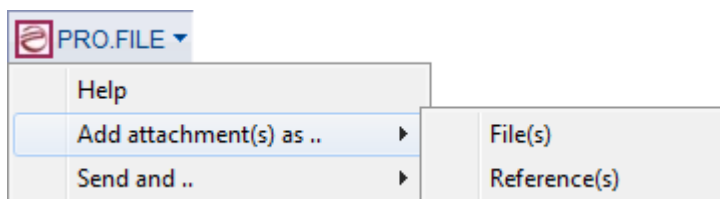

This function allows you to attach one or more references to documents saved in PRO.FILE.

PRO.FILE will open and ask you to select one or more documents that are to be attached to the e-mail.

Once you have selected one or more documents in PRO.FILE, a wizard will guide you the selection process and ask you to confirm your selection.

3.3   Saving existing e-mails in PRO.FILE

In order to save existing e-mails to the PRO.FILE database, use the "PRO.FILE Check-In - ..." or "PRO.FILE Attach-in" function in the e-mail window. These features are available to you in your inbox and in the open e-mail message.
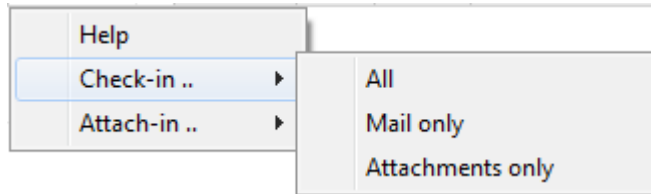
After you have highlighted or opened the desired e-mail(s), you can choose whether you wish to save the message body, the selected file attachments, or the message body and all file attachments in PRO.FILE. PRO.FILE will open a dialog box in which you can provide the information necessary for saving the e-mail.

- "PRO.FILE Check-in - all"
  will save the message body and all file attachments. All file attachments will be removed from the original mail. A file attachment to the original mail is created that lets you start PRO.FILE with the corresponding archive entry. **"PRO.FILE CheckIn – Mail only"**
  will save the message body. A file attachment to the original mail is created that lets you start PRO.FILE with the corresponding archive entry.

- "PRO.FILE Check-in – Attachments only"
  will save selected file attachments only.

- "PRO.FILE Check-in – Mail only"
  will save only the e-Mail message

- "PRO.FILE Attach-in – all"
  will save the message body and all file attachments to an existing document structure in PRO.FILE. All file attachments will be removed from the original mail. A file attachment to the original mail is created that lets you start PRO.FILE with the corresponding archive entry.

- "PRO.FILE Attach-in – Mail only"
  will save the message body to an existing document structure in PRO.FILE. A file attachment to the original mail is created that lets you start PRO.FILE with the corresponding archive entry.

- "PRO.FILE Attach-in – Attachments only"
  will save selected file attachments to an existing document structure in PRO.FILE.

Once the e-mail was saved in PRO.FILE, a Lotus Notes window will open again.

If you open an e-mail that is already saved in PRO.FILE, the above described features will no longer be available. The e-mail will contain information on the PRO.FILE data and the reference icon that allows you to find the data in PRO.FILE. To open the PRO.FILE files, click the **"PRO.FILE"** => **"Start"** button in the toolbar.

4   Index