

# ZEROCLIK FOR M-FILES ADMIN GUIDE

7 December 2016

Revision 1.2

## CONTENTS

Overview.....	3
Requirements.....	3
Part 1 - Configuring a M-Files vault to support Zeroclik for M-Files .....	4
Creating the Conversation Object .....	4
Add key Properties and Aliases required for Zeroclik for M-Files.....	5
Part 2 – Configuring Key Filing Classes and Properties.....	6
Key Settings which should be Centrally Managed .....	6
Opening the Settings Panel.....	6
Configure M-Files properties.....	6
Unlocking the Settings Options – Administrative Settings.....	7
Other Administrative Settings .....	8
Autofiling Options.....	8
Attachment Filing Options .....	8
Naming Template Options.....	9
Subject Stripping Options .....	9
Prompting Options.....	9
Other settings .....	10
Administrative Settings.....	11
Appendix A – Using the Company / Contact Person Relationship.....	12
Step 1. Enable the Company and Contact relationshipS.....	12
Edit or add the following Objects and properties to the M-Files vault .....	13
Appendix B – Hide Email Properties with M-Files Metadata Card Grouping.....	14
Appendix C - Central Settings File Management.....	16

## OVERVIEW

Zeroclik for M-Files is a Microsoft Outlook add-in designed to file emails automatically to the M-Files DMS / ECM system. Once an email is filed from Outlook to M-Files, future emails in the same conversation are automatically filed to M-Files.

Zeroclik for M-Files is ideally suited to M-Files environments where there are a high number of emails being filed to M-Files classes designed to capture emails from Outlook (Project teams, Lawyers, Accountants etc.). Zeroclik will file about 90% of these emails to M-Files totally automatically, the remainder being assisted by a metadata Predictor Panel. This level of email filing automation will ensure all important emails are filed and allow the user to maintain focus on the task at hand.

This document is a Admin Guide only. It focuses in configuring the target vault settings, the Outlook add-in settings and central management of the client configuration settings.

The Zeroclik User Guide is a separate document.

Note: Please refer back to the Zeroclik.com web site for periodic updates to the Zeroclik software and this manual.

## REQUIREMENTS

Zeroclik for M-Files is designed to work with Microsoft Outlook 2010, 2013 and 2016 for MS Windows, supported by Microsoft Exchange or Office 365 email services. An M-Files Desktop Client for Windows is required and by extension a M-Files Server vault (on-premises or cloud) is also required.

Typically, the person assigned to install Zeroclik for M-Files will either be an M-Files Partner or internal IT staff that understand and administer the M-Files vault in question.

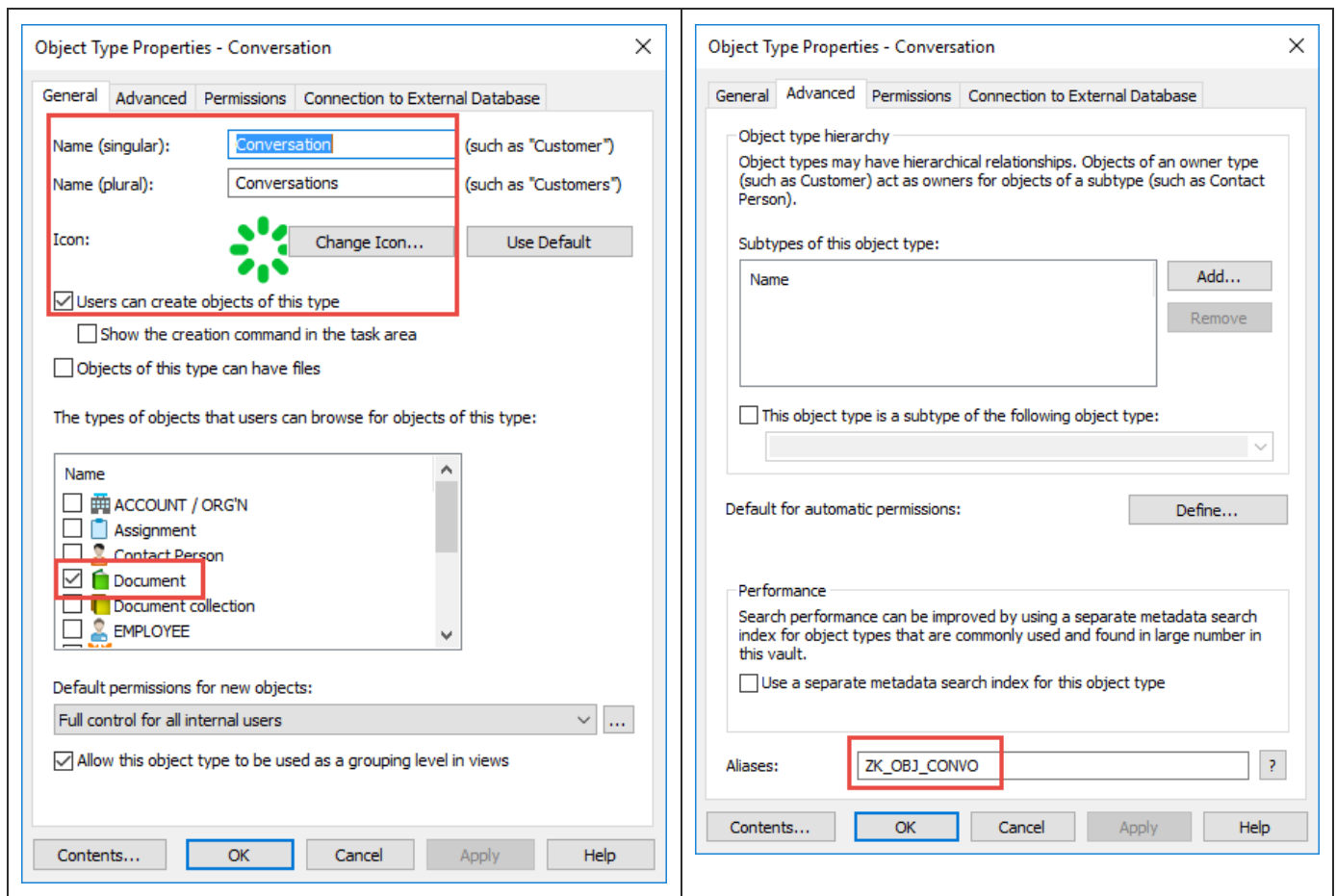
A typical Zeroclik for M-Files installation requires some configuration to the target vault and the deployment of the Outlook add-in and settings to M-Files Desktop PCs. The vault configuration involves the creation of one (1) Conversation object, a half dozen simple properties (if not present already) and aliases assigned to each.

## PART 1 - CONFIGURING A M-FILES VAULT TO SUPPORT ZEROCLIK FOR M-FILES

Zeroclik for M-Files maps to aliases of properties in the vault. Zeroclik for M-Files currently requires a number of default properties to be available with aliases. If your vault already has properties that can be reused, then just add the Zeroclik for M-Files aliases to them. Otherwise, the required properties will need to be created with the matching alias.

### CREATING THE CONVERSATION OBJECT

Create the 'Conversation' object with its alias as follows. This object is used to relate all emails of the same conversation thread.

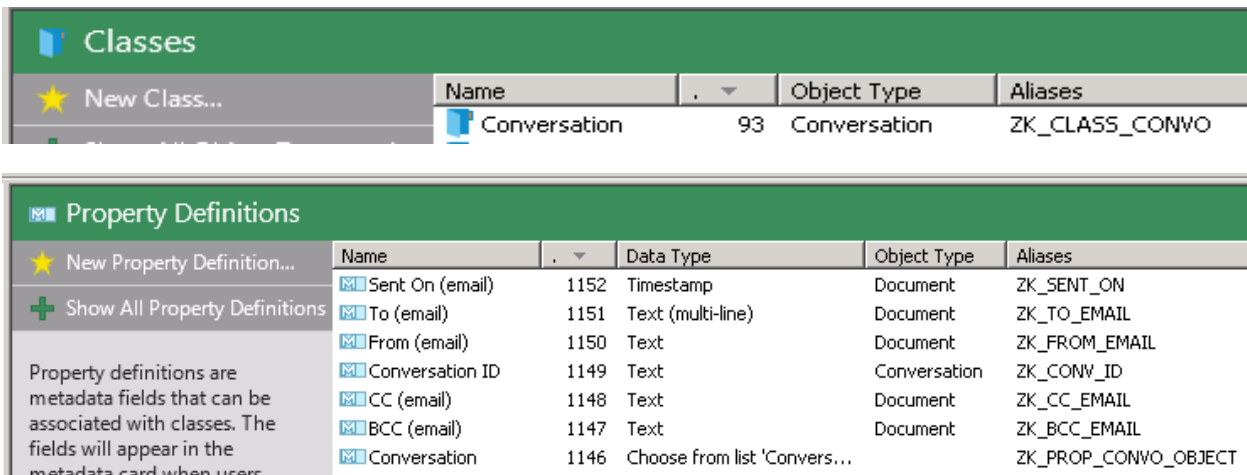


Optionally, you may use Zeroclik icon provided for the object.

This icon can be found in the "C:\Program Files (x86)\Latitude IT Ltd\Zeroclik" folder on a PC with Zeroclik installed.

## ADD KEY PROPERTIES AND ALIASES REQUIRED FOR ZEROCLIK FOR M-FILES

The following screenshot and alias list show the items required, their settings and the alias names required. If the target vault already has properties that represent a key email property (eg. To or From email) with the correct data type as shown, then the existing property can be reused by adding the alias shown.



The screenshot shows two panels from the ZeroClík interface. The top panel, titled 'Classes', contains a table with the following data:

Name	Object Type	Aliases
Conversation	93 Conversation	ZK_CLASS_CONVO

The bottom panel, titled 'Property Definitions', contains a table with the following data:

Name	Data Type	Object Type	Aliases
Sent On (email)	1152 Timestamp	Document	ZK_SENT_ON
To (email)	1151 Text (multi-line)	Document	ZK_TO_EMAIL
From (email)	1150 Text	Document	ZK_FROM_EMAIL
Conversation ID	1149 Text	Conversation	ZK_CONV_ID
CC (email)	1148 Text	Document	ZK_CC_EMAIL
BCC (email)	1147 Text	Document	ZK_BCC_EMAIL
Conversation	1146 Choose from list 'Convers...		ZK_PROP_CONVO_OBJECT

Note 1: The names of properties can vary as required (existing properties or different languages etc.), however the alias name and data type must match exactly as shown. The Zeroclík for M-Files add-in will display warning message if the aliases or data types don't correspond.

Note 2: If an existing alias already has an alias, add an ";" to the existing alias and append the Zeroclík for M-Files alias.

The table below is provided to the exact names of the aliases to the properties into your vault.

Conversation Object, Class & Property Aliases	Core Email Property Aliases
ZK_OBJ_CONVO	ZK_SENT_ON
ZK_CLASS_CONVO	ZK_TO_EMAIL
ZK_PROP_CONVO_OBJECT	ZK_FROM_EMAIL
	ZK_CONV_ID
	ZK_CC_EMAIL
	ZK_BCC_EMAIL

Note: Refer to Appendix A & B for optional configuration settings to use Company and Contact relationships and hide email properties with a metadata label.

## PART 2 – CONFIGURING KEY FILING CLASSES AND PROPERTIES

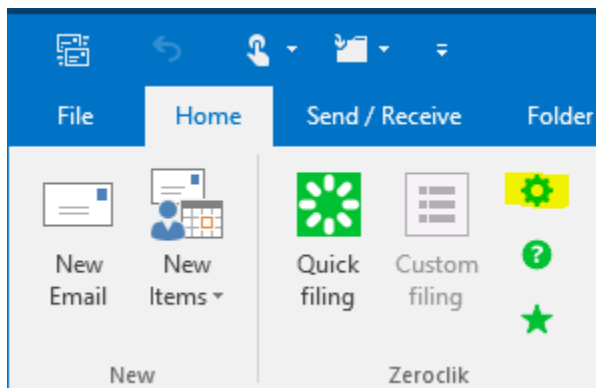
The Zeroclik for M-Files Outlook add-in has a number of settings. In a multi-user environment, many of these settings should be set to be exactly the same for each user and centrally managed. This section will show what the settings are, how they are configured and how they can be centrally managed.

The Zeroclik for M-Files Outlook add-in windows installer file is a standard Microsoft .msi software installer file and can be installed manually or via any software deployment mechanism while MS Outlook is closed. Details regarding deploying the Zeroclik.msi software installer will vary for each software deployment system and are beyond the scope of this document.

### KEY SETTINGS WHICH SHOULD BE CENTRALLY MANAGED

#### OPENING THE SETTINGS PANEL

To access the Zeroclik for M-Files Settings Panel select the highlighted icon from the Outlook menu ribbon after Zeroclik for M-Files is installed.

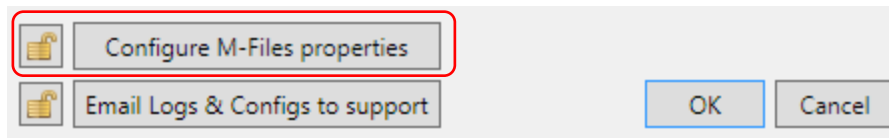
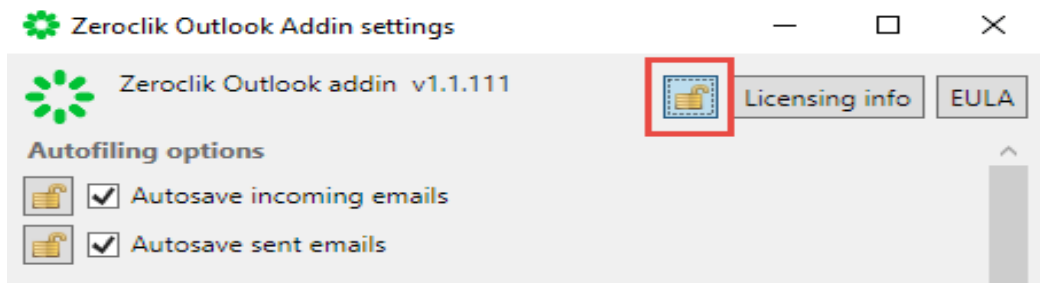


#### CONFIGURE M-FILES PROPERTIES

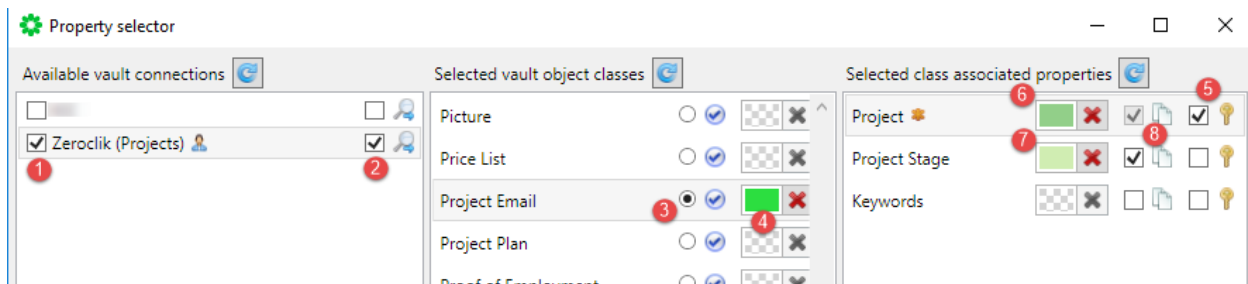
The Zeroclik for M-Files settings page will appear. Select the Configure M-Files properties as marked at the bottom of the page.

## UNLOCKING THE SETTINGS OPTIONS – ADMINISTRATIVE SETTINGS

By holding the Ctrl Alt keys down together and using the mouse to select the padlock icon shown, each setting can either be locked or left unlocked for the central settings configuration file.



Select the target vault displayed in the left panel and the options as described.



1. Select the vault for Zeroclik for M-Files to file emails. Zeroclik for M-Files supports filing to multiple vaults.
2. The 'Search Fallback' option allows the user's Zeroclik for M-Files session to look for emails filed by colleagues they have been CC'd or BCC'd on. If found, these emails will show marked as filed automatically.
3. Select the radio button for the class which should be the default class pre-selected when the Custom Metadata button is selected.
4. Change the colour of the key class's. Different colours can be used to quickly differentiate between the key filing classes.
5. Tick the properties that should be considered key properties. These will typically be properties that need to be copied across to the conversation object.

6. Change the colour of the key property. Consider using a slightly lighter colour than that used for the class.
7. If secondary properties are used, change the colour and indicate if they should be key properties key properties or just reusable properties.



Change settings for other key classes configured to file email messages as required.

Select "OK" to save the configuration



**IMPORTANT NOTE:** It is not necessary to associate the core email properties Zeroclik for M-Files uses to an email class. Zeroclik will add them as additional properties. If they must be associated with the email class they should not be tagged as a key or reusable property in the configuration panel.

## OTHER ADMINISTRATIVE SETTINGS

### AUTOFILING OPTIONS




<div data-bbox="203 976 690 1144" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Autofiling options</b></p> <p> <input checked="" type="checkbox"/> Autosave incoming emails</p> <p> <input checked="" type="checkbox"/> Autosave sent emails</p> </div> <p>Default settings shown</p>	<p>These options enable sent and incoming emails part of an existing filed conversation to be automatically saved to M-Files</p> <p>Typically, both of these options will be enabled to allow Zeroclik for M-Files to achieve the high levels of automation intended.</p> <p>It's up to the administrator to decide if the setting should be locked or unlocked.</p>
--	--

### ATTACHMENT FILING OPTIONS




<div data-bbox="203 1396 808 1554" style="border: 1px solid #ccc; padding: 5px;"> <p><b>Attachment filing options</b></p> <p> <input type="checkbox"/> Save attachments to email multi-file document</p> <p> <input type="checkbox"/> Strip attachments from original email file</p> </div> <p>Default settings shown. Set and lock as appropriate.</p>	<p>By default, Outlook emails are saved as .msg files.</p> <p>The first option will save emails as a multi-file document if the email has attachments. While the second will discard the .msg and only keep the attachment.</p> <p>This is currently a global setting which would apply to all classes being filed by Zeroclik to the vault. Future versions will allow this setting to be selectable for a specific class profile.</p>
---	---








## NAMING TEMPLATE OPTIONS

<p><b>Name template options</b></p> <ul style="list-style-type: none"> <li> Attachment name template options</li> <li> Conversation name template options</li> <li> Filed email name template options</li> </ul> <p>Default: Email Subject is the default for each. Adjust and lock as appropriate.</p>	<p>The default settings will name Emails and Conversations based on the subject or the email and attachments as provided.</p> <p>These options allow a multitude of naming variations.</p> <p>Recommendations:</p> <p>Add the date YYYYMMDD to prefix the conversation object.</p> <p>Add the Sent / Received mark to the emails to indicate direction.</p>
--	---






## SUBJECT STRIPPING OPTIONS

<p><b>Subject Re: and Fw: stripping options</b></p> <ul style="list-style-type: none"> <li> <input type="checkbox"/> Enable Re: and Fw: subject stripping for filed emails</li> <li>Fw: subject stripping spelling options</li> <li> Fw:</li> <li>Re: subject stripping spelling options</li> <li> Re:</li> </ul> <p>Default: Not enabled. Set and lock as appropriate.</p>	<p>These options allow stripping of the Re: and Fw: email subject prefixes if required. The text can be changed to support different languages.</p>
---	---

## PROMPTING OPTIONS

<p><b>Prompting options</b></p> <ul style="list-style-type: none"> <li> <input type="checkbox"/> Do not show duplicate filing warning again</li> <li> <input checked="" type="checkbox"/> Prompt to save emails being sent</li> <li> <input type="checkbox"/> Disable 'Send only' button &amp; enforce filing</li> <li> <input type="checkbox"/> Allow user to bypass filing for internal messages</li> <li> Enter domain name <input type="text"/></li> </ul> <p>Defaults shown. Set and lock as appropriate.</p>	<p>Options to hide duplicate file warning, Prompt to save emails being sent and disable 'Send Only' button.</p> <p>Typically, the new M-Files 11.3 save on send option should be disabled if shown 'Prompt to save ...' is enabled.</p>
---	---

## OTHER SETTINGS

<p><b>Prompting options</b></p> <p> <input type="checkbox"/> Do not show duplicate filing warning again</p> <p> <input checked="" type="checkbox"/> Prompt to save emails being sent</p> <p> <input type="checkbox"/> Disable 'Send only' button &amp; enforce filing</p> <p> <input type="checkbox"/> Allow user to bypass filing for internal messages</p> <p> Enter domain name <input type="text"/></p>	<p>Zeroclik support filling from multiple mail boxes. An extra license is required to be allocated for this to function.</p>
<p>Default settings shown</p>	<p>Zeroclik can automatically relate Company and Contact relationships in the same way M-Files email filing does. See Appendix B to see the extra vault configuration settings required to support these options.</p>
	<p>Enable conversation object key property duplication transfers the key properties (Project, Matter or Entity, Property etc.) set on the email class to the conversation object</p>
	<p>Hides the Zeroclik group on the Outlook menu ribbon.</p>

## ADMINISTRATIVE SETTINGS

The Administrative settings section is used to save the configuration settings to a file. Typically, once the settings have been saved they can be saved to a central configuration file by selecting a location (with .json) extension) and selecting the purple save file icon. It may be one configuration for all users or separate once for different groups or departments or users.

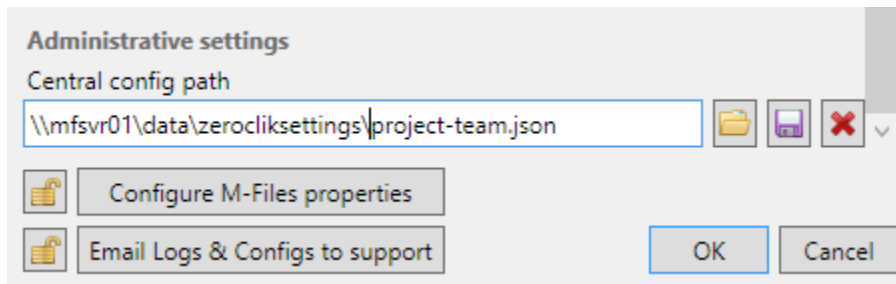


Figure 1- Using network folder for settings file.

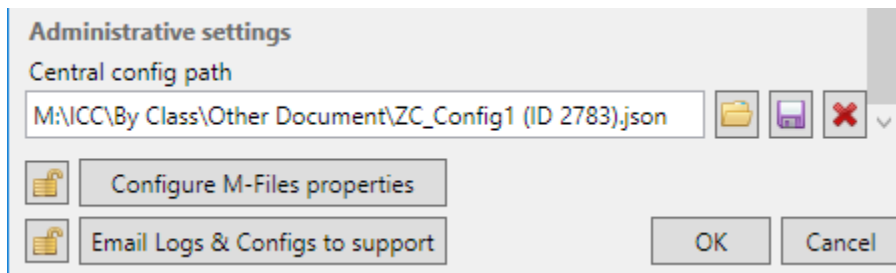


Figure 2 - Using M-Files to host settings file.

Note1: The settings files are saved in a .json format.

Note2: The settings file may be located in the M-Files vault. This approach will be M-Files drive letter dependent however. Please contact [support@zeroclik.com](mailto:support@zeroclik.com) if you wish to use M-Files to store the settings file in M-Files and require drive letter independence.

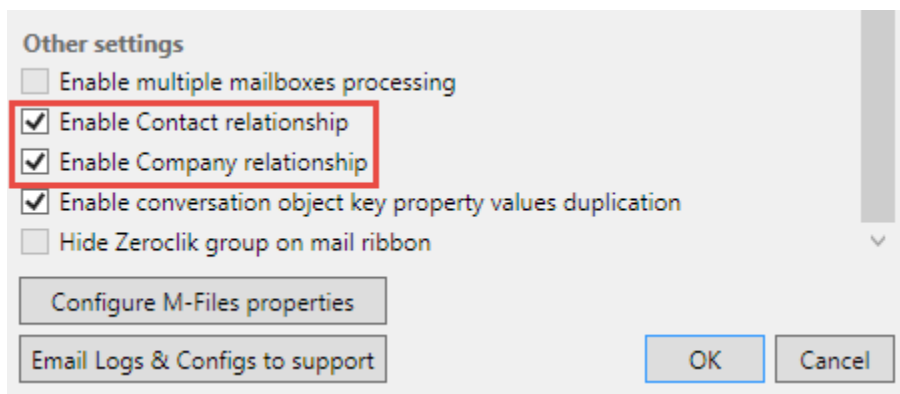
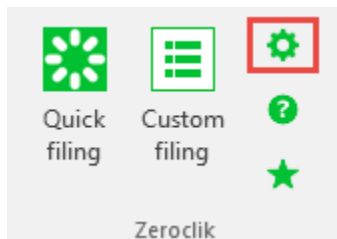
Refer to Appendix C for information on how to arrange for all PCs to refer to a central settings file.

## APPENDIX A – USING THE COMPANY / CONTACT PERSON RELATIONSHIP

Zeroclik can save emails to M-Files and relate them to a Company and Contact Person type object if a match can be made to website or email address. The following settings and configuration to the vault is required to enable this feature.

### STEP 1. ENABLE THE COMPANY AND CONTACT RELATIONSHIPS

Open the Zeroclik settings menu and enable the Company and Contact checkboxes.



## EDIT OR ADD THE FOLLOWING OBJECTS AND PROPERTIES TO THE M-FILES VAULT

For Zeroclik to match a Company type object to filed emails a text property with the matching website is required to be associated to the Company object. The names of the Object and website property are not important however the alias associated to each is required to match exactly.

The same applies to Contact Person type objects which need an associated Email address property.

The screen shots below show aliases matched to objects and properties in the Zeroclik sample vault. The names of these may differ however the alias names must match.

Object Types				
★ New Object Type...				
+ Show All Object Types and Classes				
Object type is the top-level concept of the metadata structure in M-Files. Specify object types for modeling				
Name		Type	Aliases	
Document		0 Internal		
Document collection		9 Internal		
Project		101 Internal		
Customer		136 Internal	ZK_OBJ_COMPANY	
Contact person		149 Internal	ZK_OBJ_CONTACT	
Employee		156 Internal		
Conversation		161 Internal	ZK_OBJ_CONVO	

Contact person	1081	Choose from list "Contact persons" (m...		ZK_PROP_CONTACT_OBJECT
E-mail address	1060	Text	Contact person	ZK_PROP_CONTACT_EMAIL
Web site	1086	Text	Customer	ZK_PROP_COMPANY_WEBSITE
Customer	1079	Choose from list "Customers" (multi-sel...		ZK_PROP_COMPANY_OBJECT

Note: The Website property must be associated to the Customer type object and the E-mail address property associated with the Contact Person type object via their respective classes.

The following list of aliases is provided to facilitate copy / paste of alias names.

ZK\_OBJ\_COMPANY

ZK\_OBJ\_CONTACT

ZK\_PROP\_CONTACT\_OBJECT

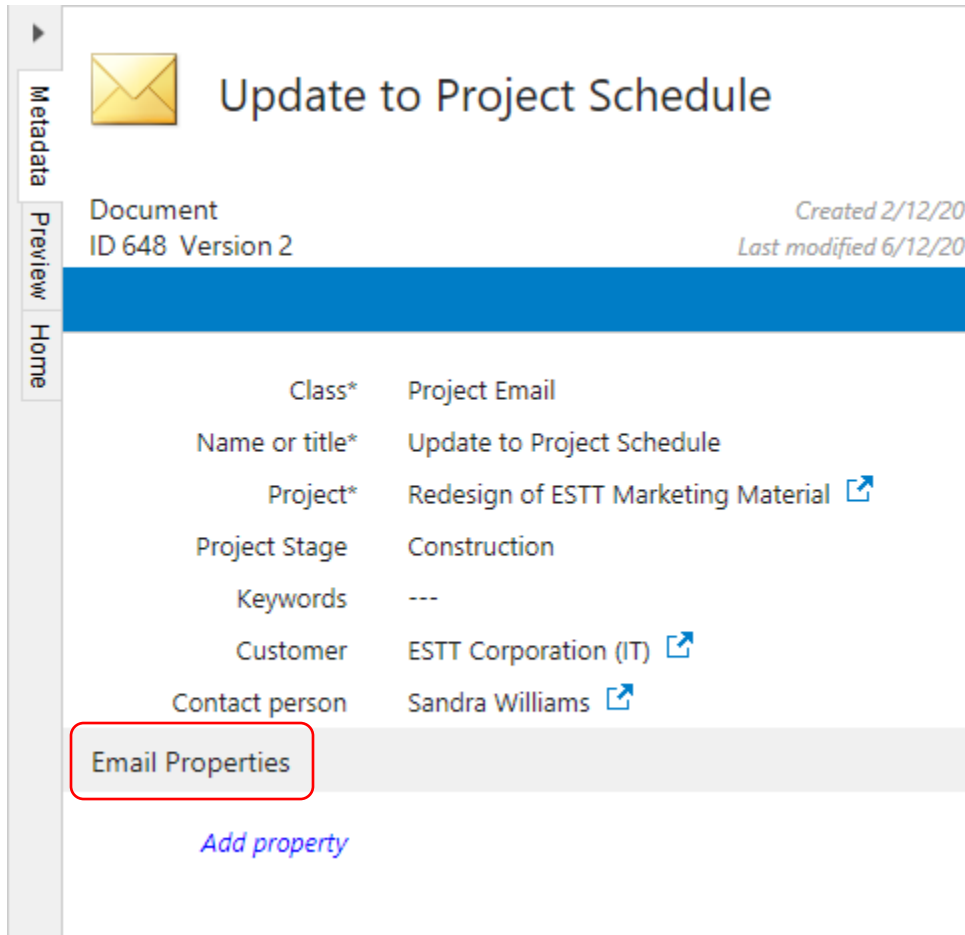
ZK\_PROP\_CONTACT\_EMAIL

ZK\_PROP\_COMPANY\_WEBSITE

ZK\_PROP\_COMPANY\_OBJECT

**APPENDIX B – HIDE EMAIL PROPERTIES WITH M-FILES METADATA CARD GROUPING**

If the core email properties are not required to be seen on the metadata card when selecting an email saved by Zeroclik for M-Files they can be hidden by using a collapsible 'Group' label using standard M-Files metadata configuration.



**Update to Project Schedule**

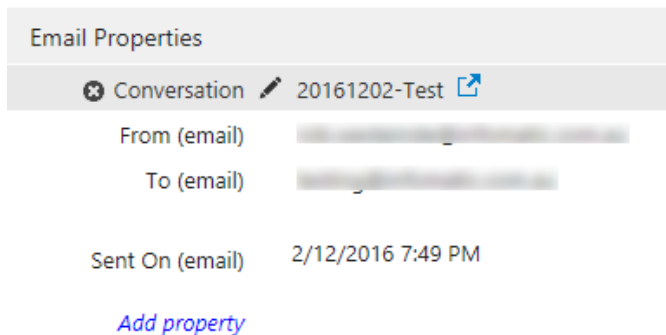
Document ID 648 Version 2 Created 2/12/20: Last modified 6/12/20:

Class*	Project Email
Name or title*	Update to Project Schedule
Project*	Redesign of ESTT Marketing Material <a href="#">↗</a>
Project Stage	Construction
Keywords	---
Customer	ESTT Corporation (IT) <a href="#">↗</a>
Contact person	Sandra Williams <a href="#">↗</a>

**Email Properties**

[Add property](#)

Expanding the collapsed label will show the other properties in the group.



**Email Properties**

✕ Conversation [✎](#) 20161202-Test [↗](#)

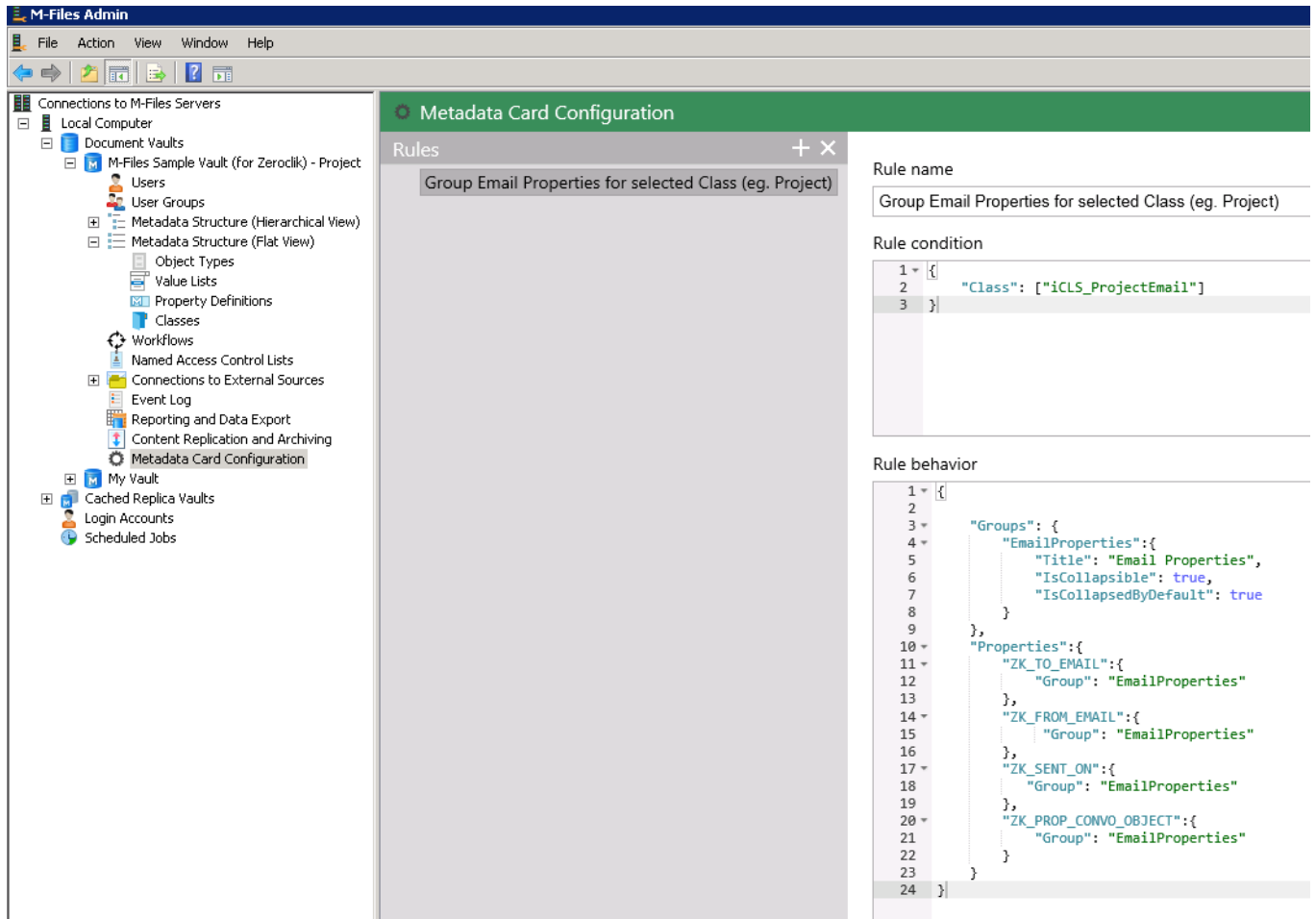
From (email) [redacted]

To (email) [redacted]

Sent On (email) 2/12/2016 7:49 PM

[Add property](#)

The Metadata Card Configuration settings, shown below, indicate how the property grouping can be configured in the Metadata Card. These settings are a guide only since they may vary on each vault.



The screenshot shows the 'M-Files Admin' application window. The left sidebar contains a tree view of system components, with 'Metadata Card Configuration' selected. The main area is titled 'Metadata Card Configuration' and contains a 'Rules' section. A rule named 'Group Email Properties for selected Class (eg. Project)' is selected. The configuration details for this rule are as follows:

**Rule name:** Group Email Properties for selected Class (eg. Project)

**Rule condition:**

```

1 {
2   "Class": ["iCLS_ProjectEmail"]
3 }

```

**Rule behavior:**

```

1 {
2
3   "Groups": {
4     "EmailProperties": {
5       "Title": "Email Properties",
6       "IsCollapsible": true,
7       "IsCollapsedByDefault": true
8     }
9   },
10  "Properties": {
11    "ZK_TO_EMAIL": {
12      "Group": "EmailProperties"
13    },
14    "ZK_FROM_EMAIL": {
15      "Group": "EmailProperties"
16    },
17    "ZK_SENT_ON": {
18      "Group": "EmailProperties"
19    },
20    "ZK_PROP_CONV_OJECT": {
21      "Group": "EmailProperties"
22    }
23  }
24 }

```

## APPENDIX C - CENTRAL SETTINGS FILE MANAGEMENT

Zeroclik for M-Files supports a number of options to provide central management of the settings file. Typically, only one is used depending on your environment.

The two key tasks required to manage the settings file are to;

- a) Save the Zeroclik settings file(s) in a central location for the users Zeroclik software to access.
- b) Choose and adjust a pointer mechanism to point to the centrally located settings file.

Typically, a Zeroclik settings file will be located on a network share or in M-Files itself.

The options for settings file pointer mechanism are listed below and are executed in a following order of priority;

1. Licence server assignment by serial number
2. Registry Key
3. Text file
4. Manually applied policy path as seen on the Zeroclik ADMIN settings
5. Local user configuration

### 1. Zeroclik Licence server configuration deployment

It is possible to assign the required path by assigning it to a Zeroclik Licence at the Zeroclik license server. Currently this can be done by emailing us at [support@zeroclik.com](mailto:support@zeroclik.com) Please provide the full path and filename and if you have more than one Zeroclik licence please specify which licence the configuration should apply to.

### 2. Registry Key

The users' registry key can be modified by script or policy to specify the relevant settings file. This value may be set the same for all users or be different for user groups.

To do this please create the following key –

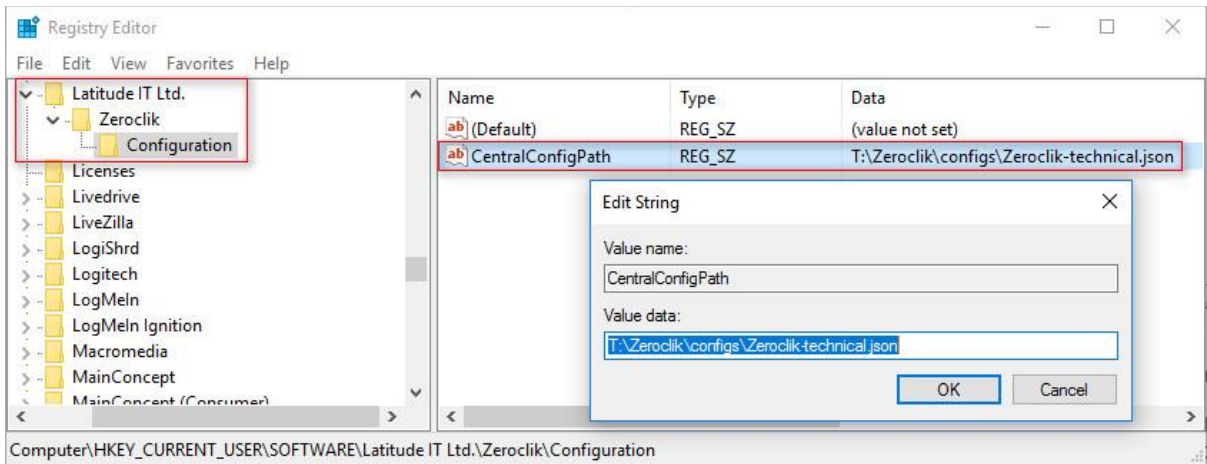
HKEY\_CURRENT\_USER\SOFTWARE\Latitude IT Ltd.\Zeroclik\Configuration

**Note: The full stop appended to Ltd. In the key name.**

Once the key is created please create the following string value –  
CentralConfigPath

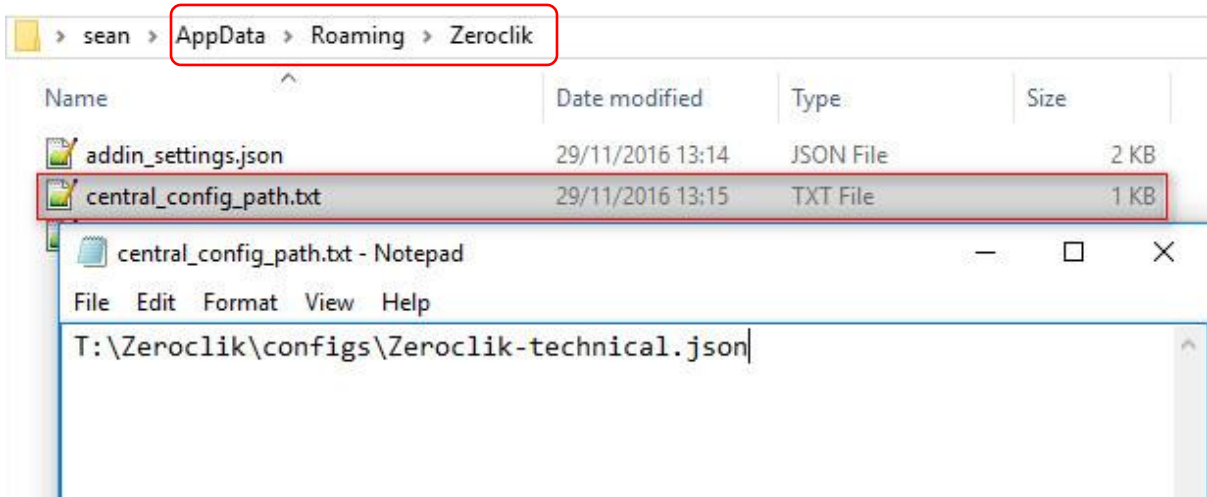
Lastly assign it a value including the full path and filename of the policy configuration as shown in the example below, substituting the name of user settings file.





### 3. Text File

It is possible to place a simple text file called `central_config_path.txt` into the users Zeroclik profile. The text file should contain the full path and filename to the desired policy configuration as shown in the example below.

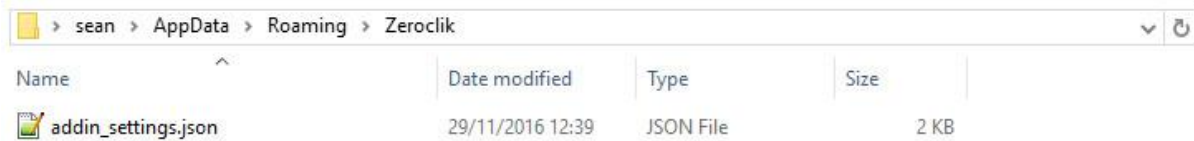


#### 4. Common Settings File

If you only have a handful of users to manage and you simply want to save and work from a central configuration, simply save the policy configuration to a shared folder on the first computer and open the configuration on the second computer.

#### 5. Default Settings File

Finally, if no policy configuration is specified or found the local configuration file will be used. The local configuration is found in the users roaming profile as shown in the example below.



Testing the Central Settings Configuration file can be achieved by changing a setting in the central settings file and restarting Outlook on another PC to see if the Zeroclik settings change accordingly.