zeroclik

ZEROCLIK FOR M-FILES
USER GUIDE

30 November 2016

Revision 1.0

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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 User Guide only.

The Zeroclik Admin Guide advises how Zeroclik for M-Files can be configured and centrally managed within your environment.

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.

Some adjustments need to be made to the M-Files vault by the M-Files administrator before Zeroclik for M-Files will work. These steps are detailed in the Zeroclik Admin guide.

USER INTERFACE

Once installed, Zeroclik for M-Files will add a few items on the MS Outlook menu ribbon and a menu tab as shown below.
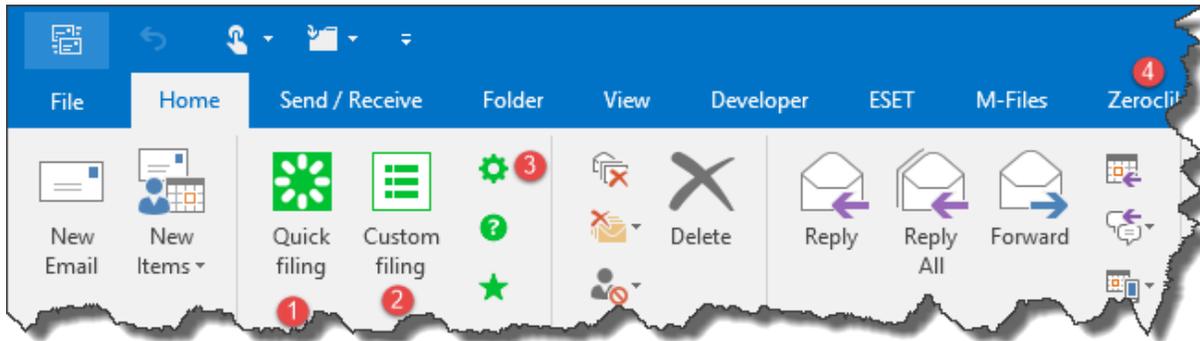

Figure 1 - Zeroclik Add-in shown in MS Outlook 2016

1. The 'Quick filing' will be the main button used for filing emails to M-Files. It launches the Predictor Panel when selected after highlighting an email. The same Predictor Panel is launched when sending emails if the 'Prompt to save emails being sent' setting has been enabled.

2. The 'Custom filing' button will present the standard M-Files metadata card.

3. The 'Settings' button offers many options for filing emails. Many of these settings will be centrally managed by your M-Files administrator.

4. The 'Zeroclik' menu tab allows access to the Zeroclik for M-Files ribbon items in the cases where they do not display.

SAVING AN EXISTING EMAIL TO M-FILES

Existing emails are saved to M-Files by selecting the email in MS Outlook and selecting the 'Quick filing' button. Double click a previous selection of related metadata or select the 'Custom metadata' card If the project or matter you require has not been selected before.
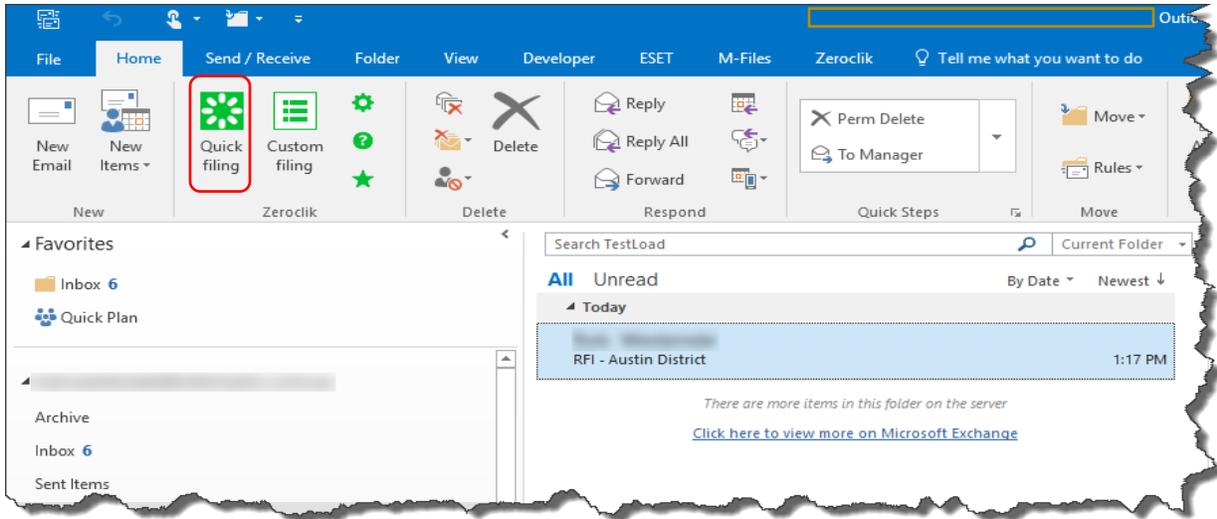

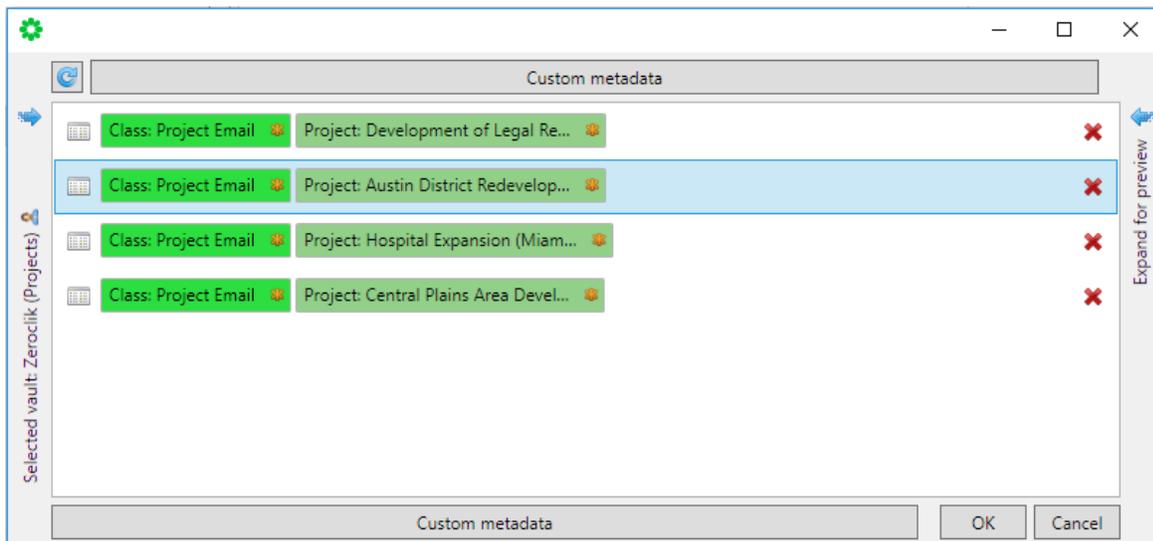**Figure 2 - Saving an existing email**

Figure 3 - The Predictor Panel

Once saved to M-Files, the email will be marked as such with a tick or colored category depending on which has been selected in the settings.
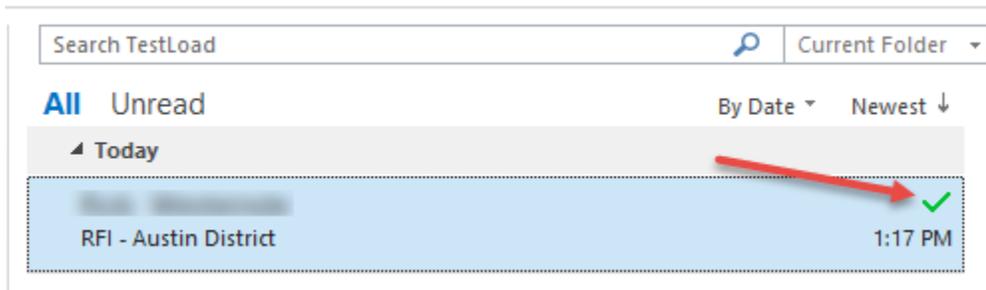
Figure 4 - Showing email marked as saved to M-Files by Zeroclik

Note 1: This mark may display as a category based on settings

Note 2: Any new emails, sent or received, part of the same conversation will be automatically filed.

SAVING A NEW EMAIL WITH ZEROCLIK SAVE ON SEND ENABLED

Sending a new email or replying to an existing email will display the Zeroclik Predictor Panel. Typically, a recently selected item can be selected from the list by double clicking the item (1).
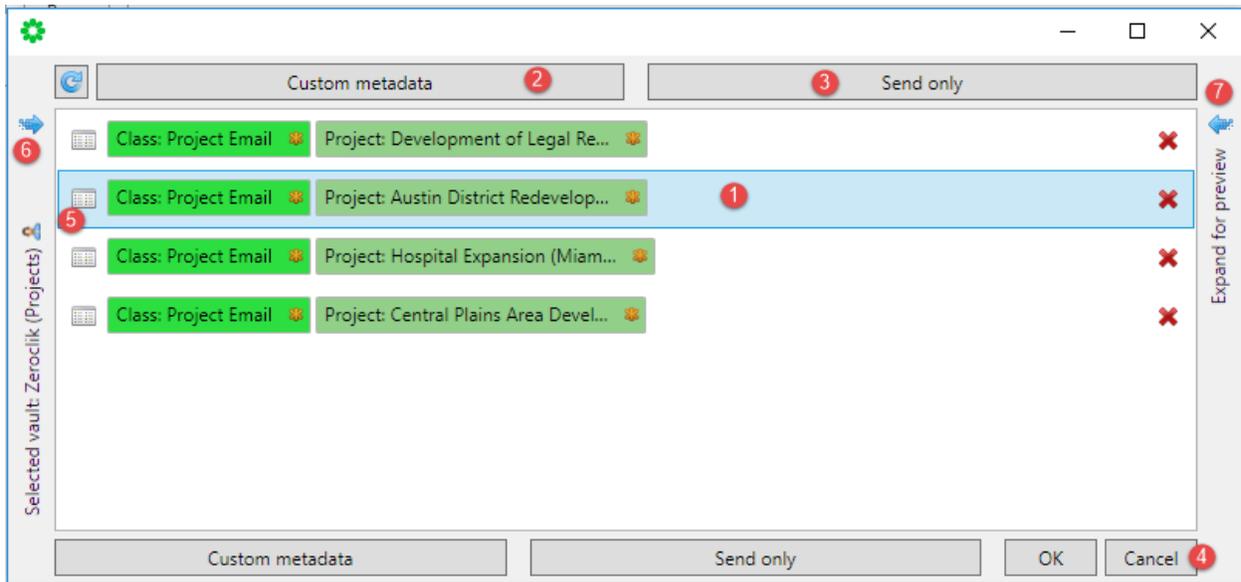

Figure 5 - Predictor Panel options

Alternatively, a number of other options are available as shown.

2. Open the M-Files metadata card to input new values
3. Send Only, do not save to M-Files. All future emails in the conversation will be ignored
4. Cancel. Don't send or save to M-Files and return to the email being edited
5. Same as (1) but selects prevision selections one action
6. Expand the vault selector panel
7. Expand the previously selected properties panel relating to the selection

Predictions can be removed from the list by selecting the red 'X' symbol.

Note: Any new emails, sent or received, part of the same conversation will be automatically filed.

VIEWING EMAILS IN M-FILES

Right clicking on an email saved to the M-Files vault by Zeroclik will show a few extra options. To quickly view all saved emails in the same conversation, select the option shown below.

The "Search in M-Files" will list previously filed key objects like project or matters opening a view for all documents related to that key property.
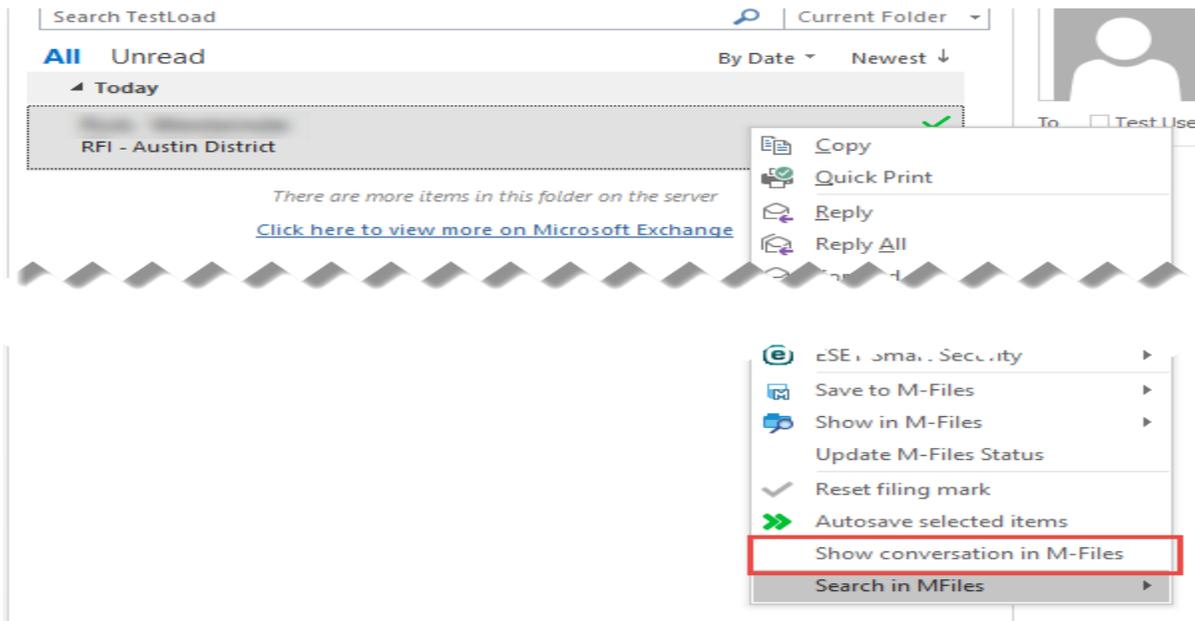

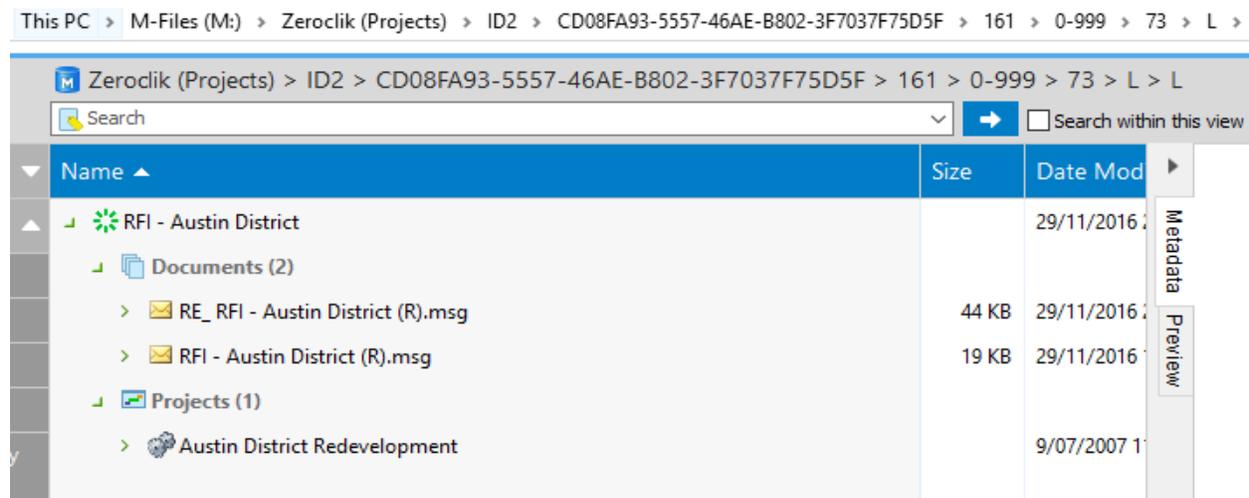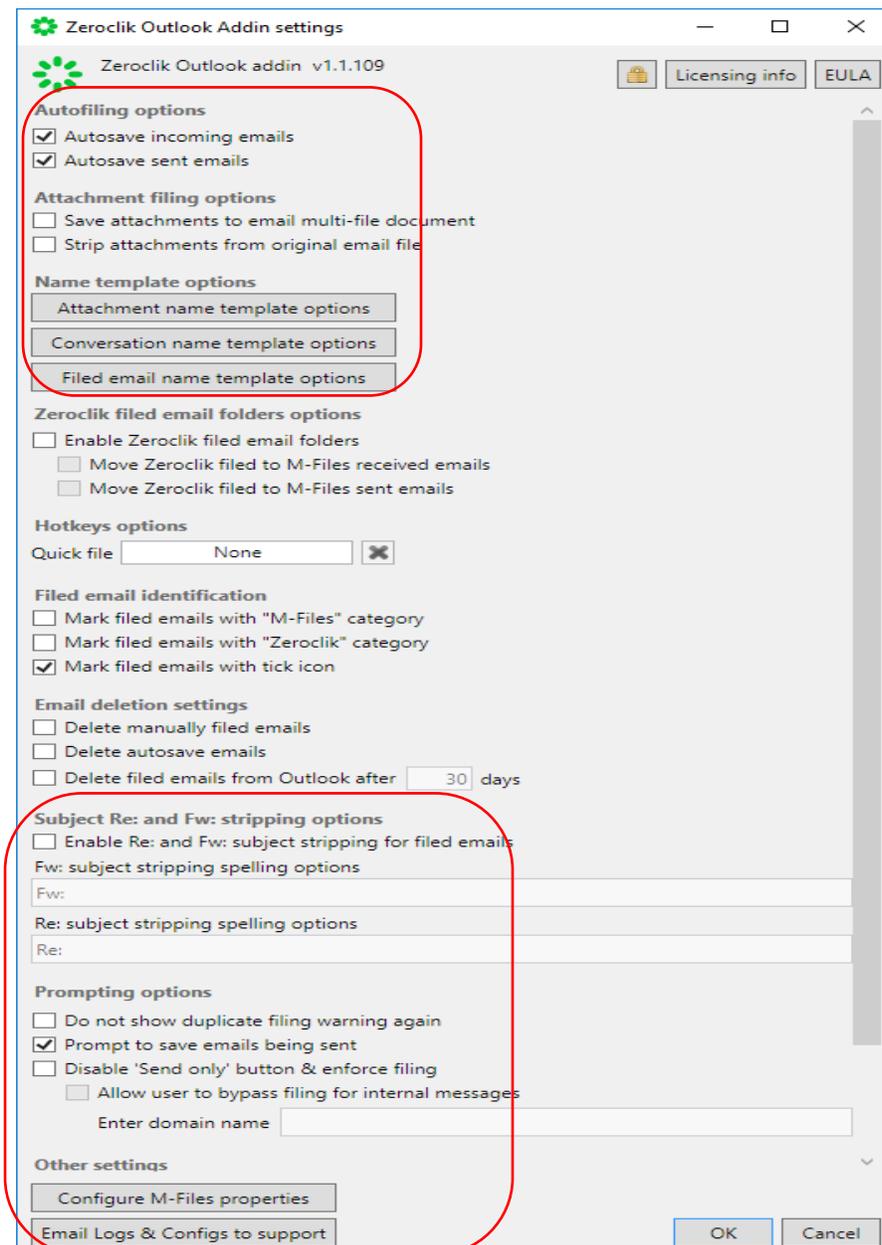Figure 6 - Showing the Zeroclik right click menu

Figure 7 - The resulting email conversation object and related emails

SETTINGS

Zeroclik for M-Files has numerous setting options as can be seen in the screen shot below. The Zeroclik for M-Files settings marked with the RED boarder should be set by the M-Files administrator to be identical for all users in saving to a given vault. The remaining settings can be typically made available for users to set their own individual preferences. The M-Files administrator may choose to lock some or all settings. If settings are managed centrally and locked they will appear as greyed out.

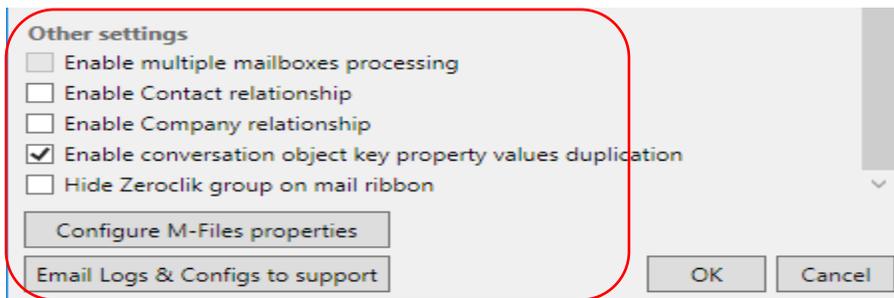The more advanced settings grouped in RED will be discussed in the Zeroclik for M-Files Admin manual. The remainder are self-explanatory.

Figure 8 - Settings Panel