

Content Manager

Software Version 9.4

EmailLink Installation and Configuration



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Introduction

About Content Manager EmailLink

Content Manager EmailLink enables users to add email items to a mail folder, which checks them into a pre-defined Content Manager Container record.

This feature allows users to check in mail items quickly to frequently used Content Manager containers without the need to have the Content Manager client installed, or if it is installed, open on their computers.

Users can set up and manage multiple Check In Styles to manage their email items, as required.

CM_EmailLink_x64.msi installs two services on a server that enable this Content Manager functionality.

About this document

This document provides information for you to install and configure Content Manager EmailLink.

EmailLink prerequisites

For prerequisites, see **CM9.4_Spec.pdf** in the Content Manager installation folder.

Installation and configuration

Creating the Domain User

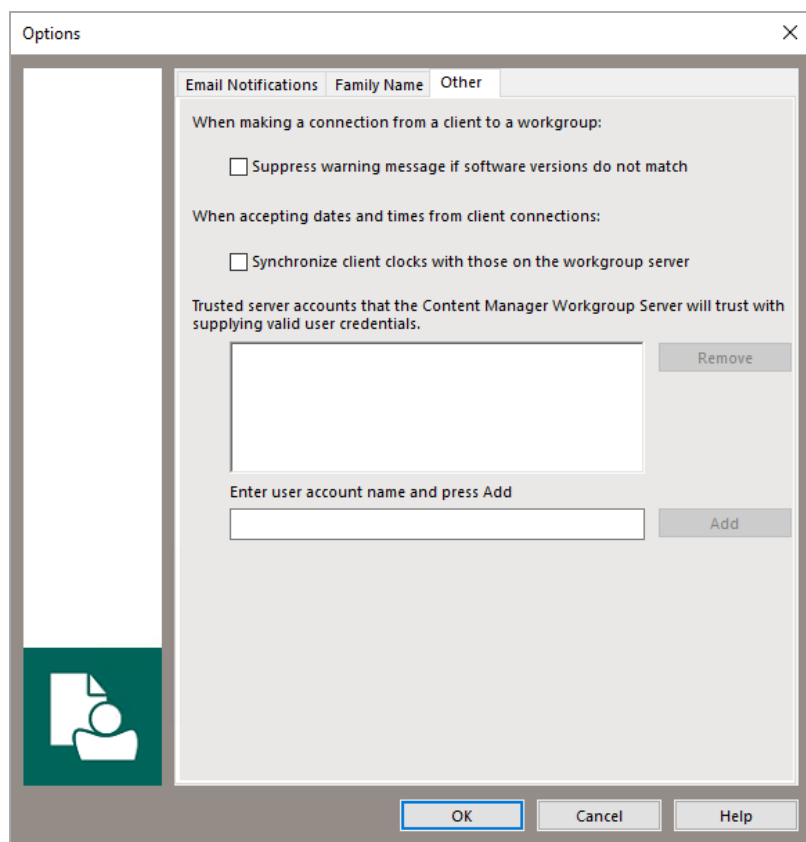
Exchange Authentication

Create a domain user account with the permission **Impersonate** in the Exchange Server.

You can set the user name and password in the **Exchange Credentials** section of the **Admin Console**. Then, if you are setting up EmailLink in the same domain as the Exchange Server, the account to run EmailLink will probably be the same one that also has permission to impersonate in the Exchange Server.

If you are not in the same domain as the Exchange Server, for example, when you are running EmailLink against an Office 365 Exchange Server, you can set the Exchange credentials manually.

If the user account with the permission **Impersonate** is not the account which is used to run the **Content Manager Workgroup Service** in your environment, then add the user to the trusted accounts list using **Content Manager Enterprise Studio** - on the **Home** tab, in the **General** group, click **Options**. On the displayed **Options** dialog, click **Other** and add the trusted accounts.



Gmail Authentication

Create the Credentials

Configuring authentication for Gmail requires the creation of a service account in your Google Apps domain. The steps required for this are documented in the [Google Apps Admin SDK](#). In short, the steps to follow are:

1. Create a Google Apps SDK project.
2. Enable the Gmail API for this project.
3. Create your service account.
4. Create the credentials for your service account.
5. Save the JSON or P12 file in a safe place.
6. Configure the Gmail scope for the service account in the [Google Admin console](#).

NOTE: When creating the credential key file select JSON or P12.

Configure in EmailLink

Once the credentials are created, in the Content Manager EmailLink Admin console, <http://localhost:1338/Preferences>, on the **Configuration** page, expand **Authentication** and select Gmail. Complete the details as follows:

1. Enter your mail domain (e.g. acme.com) in the Domain field.
2. Enter any text in the User Name, this field is not used for Gmail authentication.
3. Enter the service account email address (e.g. tutorial-service-account@tutorial-project-1348.iam.gserviceaccount.com) in the Service Account Email Address field.
4. Navigate and select the JSON or P12 key file.
5. Add the credentials and re-start the Content Manager EmailLink Sync Service.

For additional details on setting up the EmailLink Authentication for Exchange and/or Gmail, see the EmailLink help that is accessible via the EmailLink Admin console, <http://localhost:1338/help/>.

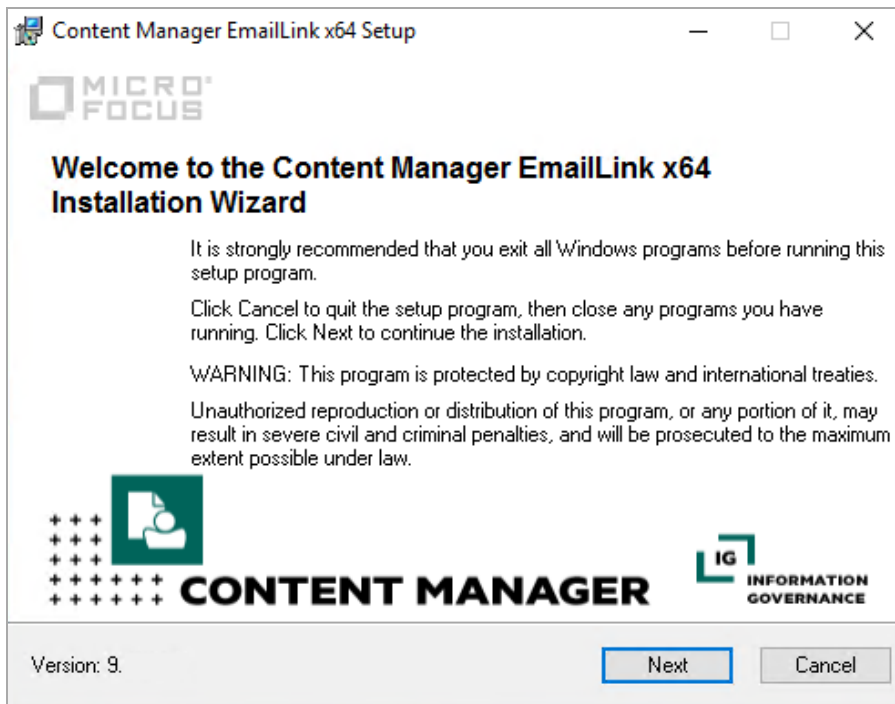
Installing EmailLink

CAUTION:

After running the **CM_EmailLink_x64.msi** (see below for details), ensure both Content Manager EmailLink Services are started.

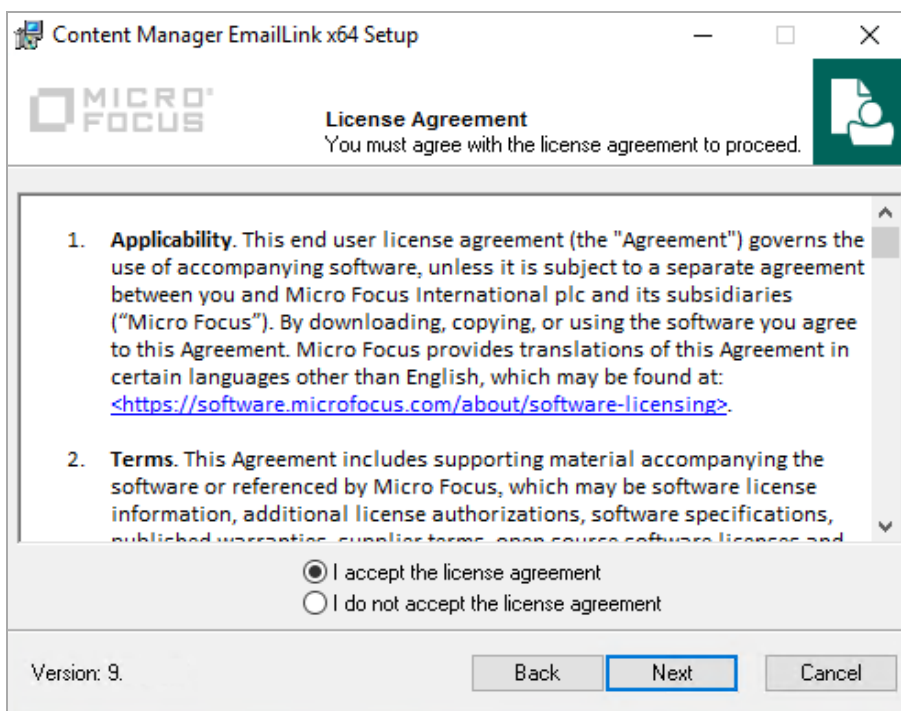
1. With elevated user rights, from the installation media, run **CM_EmailLink_x64.msi** file

The **Welcome** dialog appears:



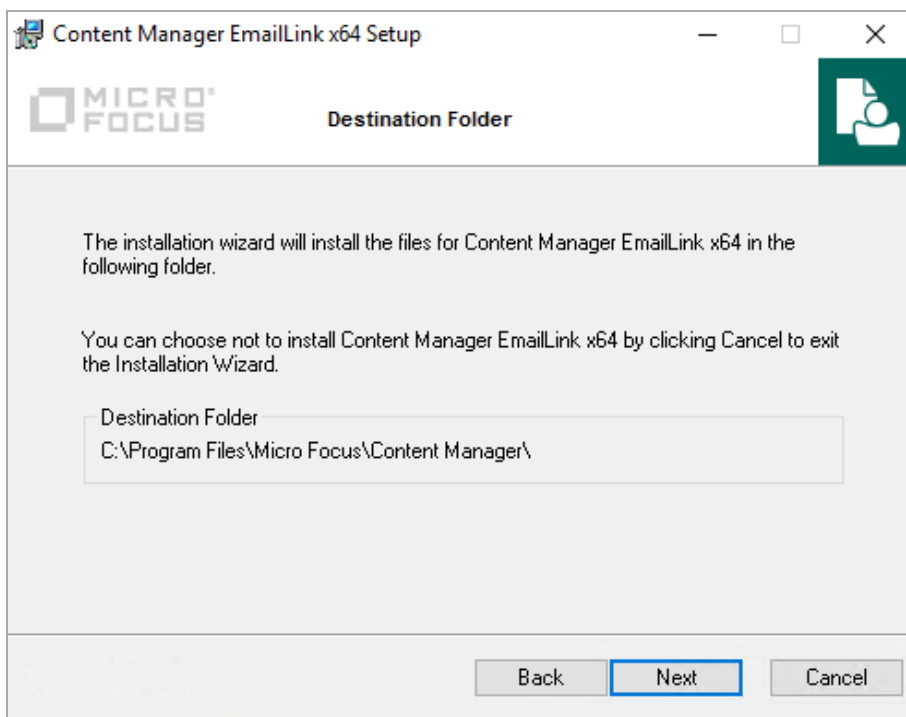
2. Click **Next**.

The **License Agreement** dialog appears:



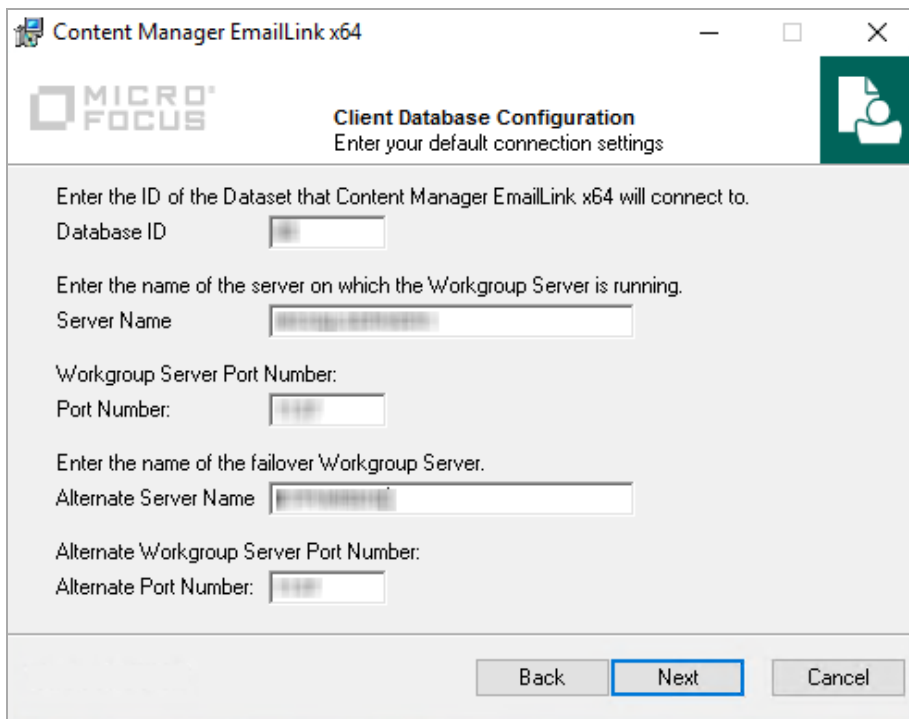
- 3. Select **I accept the license agreement** and click **Next**.

The **Destination Folder** dialog appears:



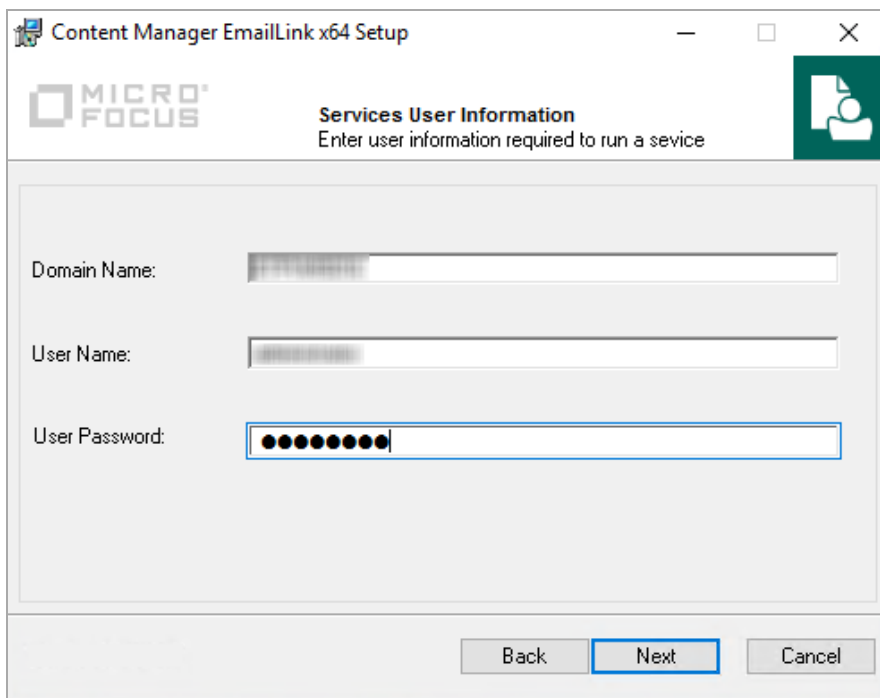
- 4. Click **Next** to keep the default installation folder (recommended).

The **Client Database Configuration** dialog appears:



- **Database ID** – Content Manager dataset ID that EmailLink should link to the Exchange Server mail accounts.
 - **Server Name** – the Content Manager Workgroup Server EmailLink should connect to.
 - **Port Number** – the Workgroup Server port number to use. Default: **1137**.
 - **Alternate Service Name** – the secondary Content Manager Workgroup Server EmailLink can connect to if required.
 - **Alternate Port Number** – the secondary Content Manager Workgroup Server port number to use.
5. Click **Next**.

The **Services User Configuration** dialog appears:

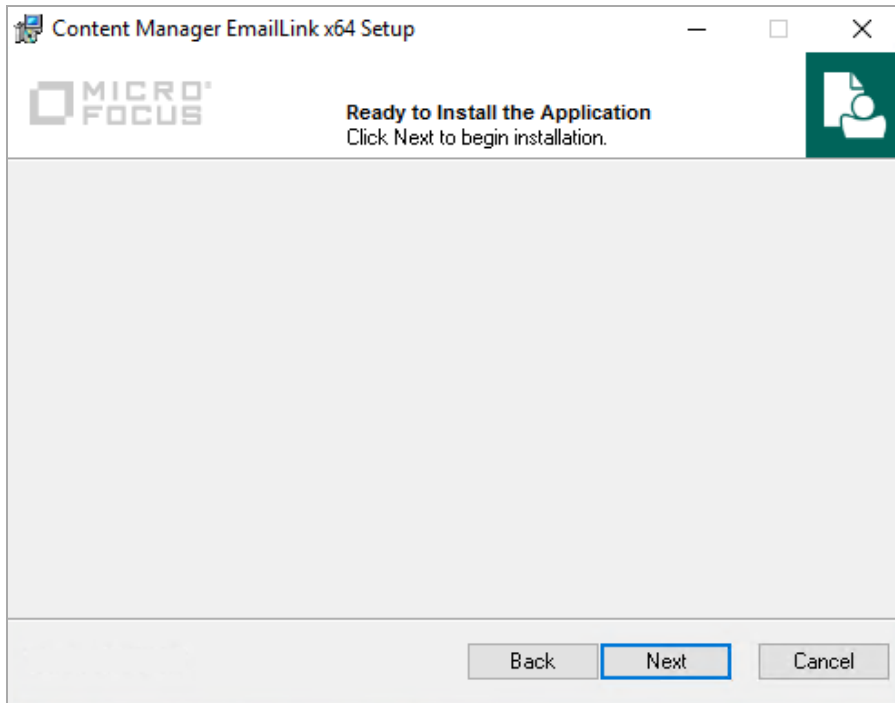


- **Domain Name**
- **User Name** – the name of the user to run the services. See [Creating the domain user](#) above for more detail on the requirements for this user.

NOTE: This service user must be an administrator on the server where EmailLink is installed.

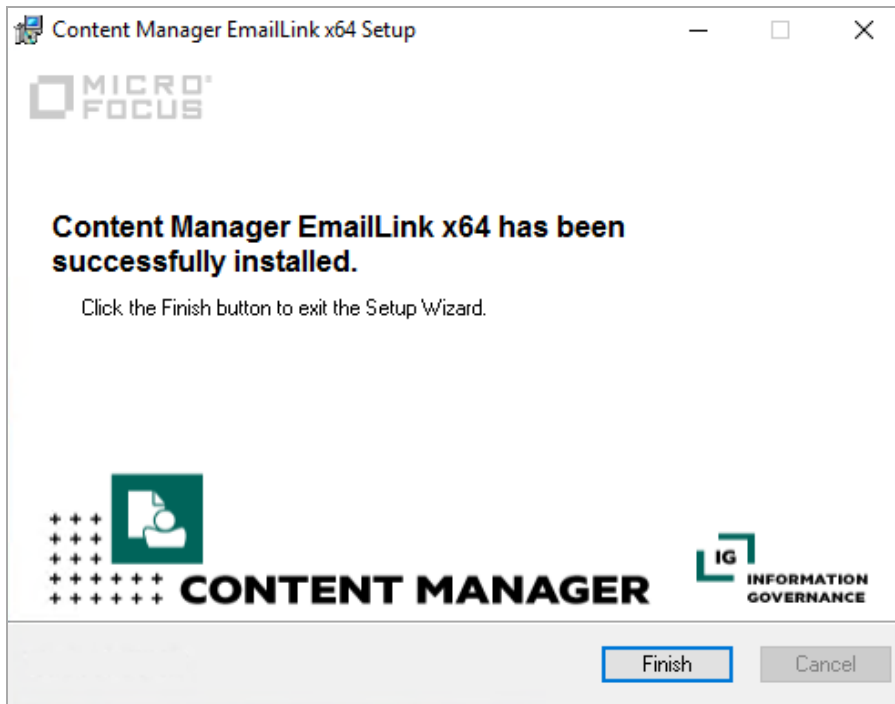
- **User Password**
6. Click **Next**.

The **Ready to Install the Application** dialog appears:



7. Click **Next**.

The confirmation dialog appears:



The installation of EmailLink is complete and has installed two services on the computer:

- **Content Manager EmailLink Admin Service**

— Content Manager EmailLink Synch Service

The installation has also created the folders:

— C:\Micro Focus Content Manager\EmailLink

NOTE: This folder is not created until after the Content Manager EmailLink Admin Service is started.

— C:\Program Files\Micro Focus\Content Manager\EmailLink.

8. Use the **EmailLink Preferences** console for further configuration by using your web browser to navigate to: <http://localhost:1338/Preferences>. The console has a help button to assist with configuration issues or questions you may have.
9. Use the Windows **Services** function to start the **Content Manager EmailLink Synch Service**.
10. Open the Content Manager client as an Content Manager administrator and on the **Administration** tab, in the **Options** group, click **System Options**. From the **Features** tab select the feature **Check In Styles** and click **OK**.
11. Restart the Content Manager clients, if they were running, to enable the new functionality. Content Manager users with an electronic address against their user profile and a matching email account on the Exchange and/or Gmail Servers can now create links to Content Manager containers using the record context menu **Send To – Add To Check In Styles**.

Installing EmailLink from a Command Line

1. Open a command prompt as administrator, for example, right-click it in the **Start** menu, and then click **Run as administrator**.
2. Edit the below sample command lines to suit your own needs.
3. Copy and paste the commands line to the Command prompt window and press Enter.

Sample Command Line for installing EmailLink

```
"C:\Users\username\Desktop\CM_EmailLink_x64.msi" /q /! *vx
"C:\Users\username\Desktop\Installlog.txt" EXL_WG="PrimaryWorkgroup" EXL_WG_
ALT="secondaryWorkgroup" EXL_ADMIN_PORT="AdminPortNo" EXL_DBID="DBID" EXL_
PORT="PortNo" EXL_PORT_ALT="AltPortNo" EXL_DOMAINNAME="DomainName" EXL_
SERVICEUSER="username" EXL_SERVICEPASS="Userpassword"
```

Upgrading from ExchangeLink to EmailLink

The ExchangeLink feature was introduced in HP Records Manager 8.1. In Content Manager, this feature was enhanced and renamed to EmailLink.

CAUTION:

Before upgrading to Content Manager EmailLink, stop the **EmailLink Admin Service** and the **EmailLink Synch Service**.

To upgrade ExchangeLink to EmailLink, on the machine where ExchangeLink is installed, run **CM_EmailLink_x64.msi** as an administrator. Follow the installation steps described in [Installing EmailLink, on page 7](#)

Depending on the version of ExchangeLink that was previously installed, the root directory for ExchangeLink may be either C:\HP Records Manager or C:\HPE Records Manager. After upgrading, in that default location, there will now be a folder called **EmailLink**, as well as the ExchangeLink folder.

Once upgraded, navigate to the default root directory where both the ExchangeLink and EmailLink folders are, right-click on the **EmailLink** folder and click **Delete**. Once the folder has been deleted, right-click on the **ExchangeLink** folder and click **Rename** and rename this folder to **EmailLink**.