



DocMoto

Working with Emails

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Introduction

This document will outline how users can work with Emails within the DocMoto system. It will cover four key areas:

1. Importing
2. Creating
3. Viewing
4. Searching

1. Importing Emails:

DocMoto is file independent and can import any type of electronic file including emails. Many areas of the DocMoto system are configurable including the column headers within the main view. If users want to store Emails within the system, it is advisable to change the column headers (either on creation or post creation) to reflect the file type being stored. i.e. Subject, Date, From, To, CC, etc.

To adjust the column headers of a folder on creation:

1. Navigate to the area where the folder needs creating.
2. Select the **"New Folder"** option from the **"File"** menu (OR via the right mouse click OR the short-cut cmd + shift + n)
3. A dialog will be presented allowing the user to enter the name of the new folder and the ability to adjust the folder's properties.
4. Select the **"Folder Columns"** tab. The five default columns (Name, Version Size, Checked-In On, Created By, Comment) will be listed. Remove these columns by selecting **"Name"** and then the **"-"** button to remove.
5. Once the default columns have been removed, select the **"+"** button to add new column headers.
6. A dialog will be presented allowing the user to select (and add) the new columns. Navigate to the **"Emails"** section, expand and select the desired columns as shown below in **Fig. Email Folder - Adjusting Column Headers**.
7. The selected Email columns will be added and the user can adjust the order by dragging the columns in order of appearance.
8. Select the **"OK"** button to confirm the folder creation.
9. The folder will be created with the appropriate columns as shown below in **Fig. Email Folder - Column Headers**.

Note: To adjust an existing folders properties or to create a folder template the user has to have administrative rights.

Fig. Email Folder - Adjusting Column Headers

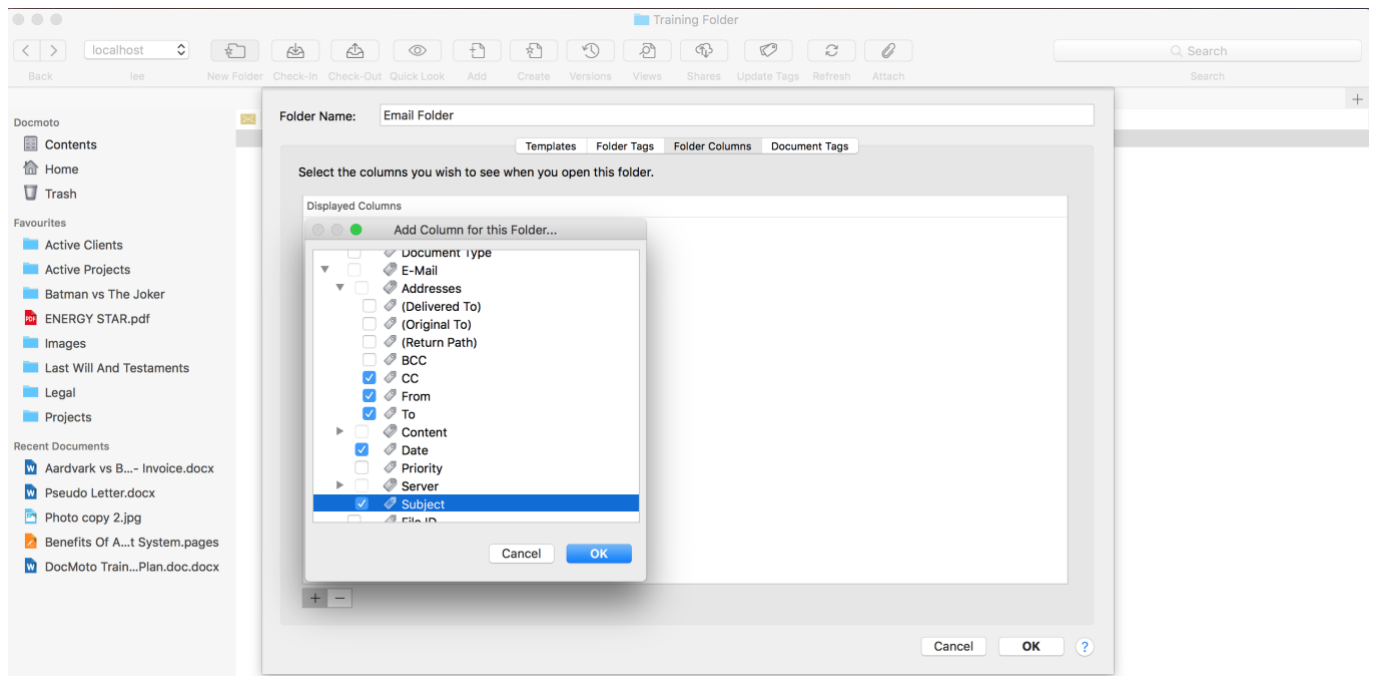
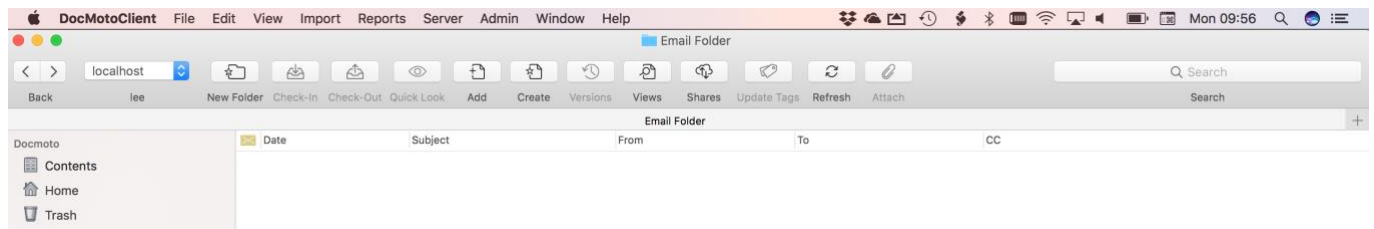


Fig. Email Folder - Column Headers



Email Folder - Additional Note:

Email folders can be created from a folder template, either as a “stand alone” folder or as part of a hierarchical structure. Please refer to this video tutorial - [Creating Folder Templates](#)

Importing:

Once the email folder is created, users can import emails into this folder by a simple drag and drop method from their email client (Apple Mail, Microsoft Outlook & Mozilla Postbox) directly into the folder. Please refer to this video tutorial - [Importing Emails](#)

Importing - Additional Note:

Each native email client has its advantages and disadvantages when working with the DocMoto system. These have been listed below.

Technical Note - What's a promise?

A promise represents an operation that has not completed yet, but is expected to in the future.

Apple Mail:

Pros:

- Native Apple product.
- Supports DocMoto Link technology, specifically "**x-docmoto -> Rich Text**" link.
- Supports the ability for third-party applications (such as DocMoto) to remove emails (in DocMoto's case - on a successful upload). This would be enabled if businesses want one (and only one) definitive email store.

Cons:

- Does NOT support the ability to export and subsequently import into DocMoto multiple emails, including whole conversation threads in one go.
- No longer supports a promise (please see above for technical description), this was removed in OS X Mavericks. The ability to drag and drop a file (or folder) directly from DocMoto into an existing mail.

Microsoft Outlook:

Pros:

- Supports the ability to export and subsequently import into DocMoto multiple emails, including whole conversation threads in one go.
- Supports DocMoto Link technology, specifically "**x-docmoto -> Rich Text**" link.
- Supports the ability to take a promise. What means the ability to drag and drop a file (or folder) directly from DocMoto into an existing mail.

Cons:

- Additional costs

Mozilla Postbox:

Pros:

- Same as Microsoft Outlook

Cons:

- Additional costs

2. Creating Emails

Master documents are used as the basis for creating new documents. Most organisations will already have some kind of master documents. Often located in a shared folder on the network. These can be loaded directly into DocMoto by dragging them into the **“DocMotoConfig/MasterDocuments/”** folder.

Using Master documents ensures that all users create documents with a common look, style and content.

Master documents can be any file type, not just documents. Images, spreadsheets, Emails, etc. In fact anything where there is a desire to have a common style/content.

Creating:

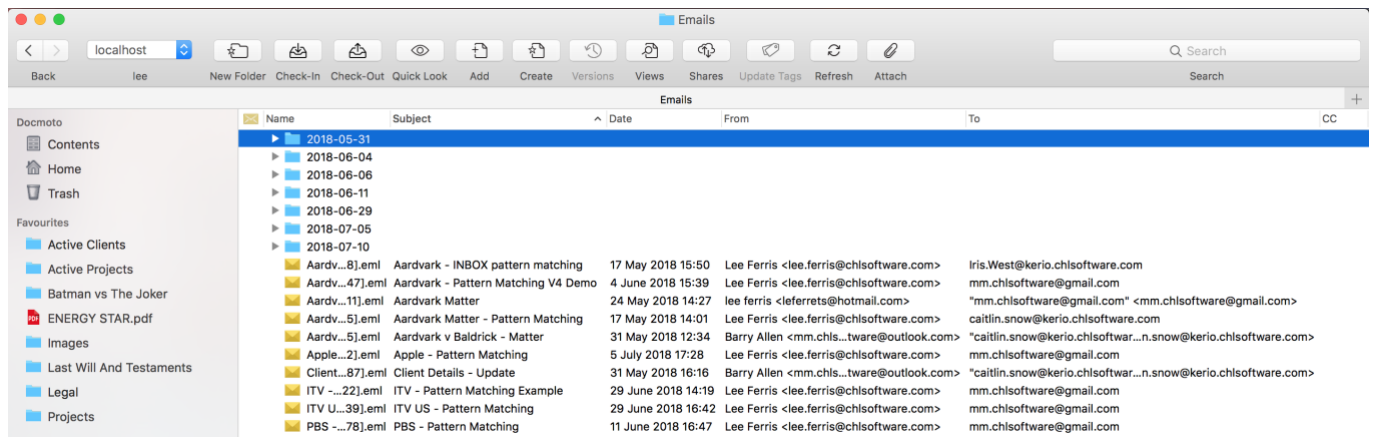
To enable users to create an email from a master template, please refer to this video tutorial - [Creating Emails from a master template](#)

3. Viewing Emails

DocMoto has utilised Apple's Quick Look libraries so users can view/preview files (documents, emails, videos, audio, etc) without opening them. This section is going to illustrate tips and tricks with reference to using the Quick Look function in DocMoto to view/preview emails.

The screenshot below (**Fig. Email Folder - Contents**) illustrates an email folder configured so that the columns are representative of viewing an email listing (Subject, Date, From, etc).

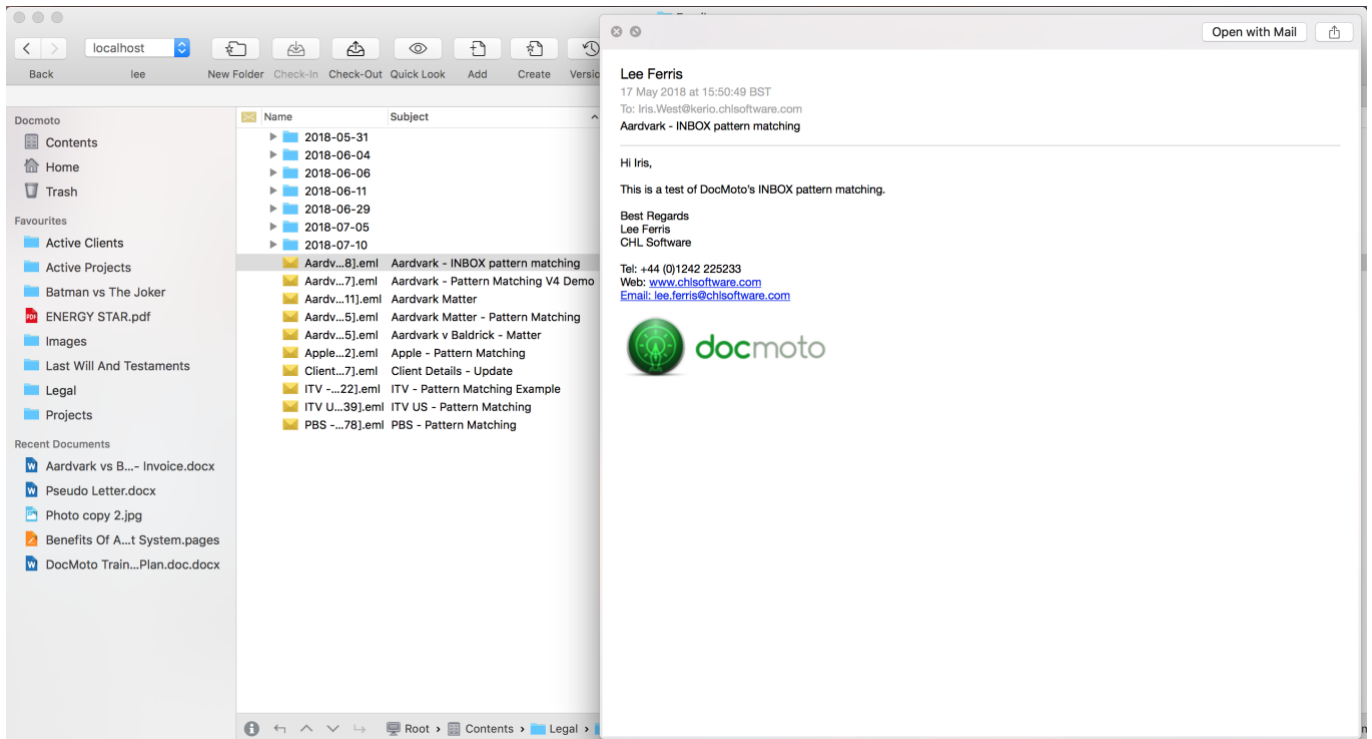
Fig. Email Folder - Contents



To view any/all of these emails listed in **Fig. Email Folder - Contents**:

1. Select the Email to view
2. Select either: **(a)** The spacebar **(b)** The Quick Look button on the toolbar **(c)** The Quick Look option from the **"File"** menu **(d)** The Quick Look option from the right mouse click menu.
3. A Quick Look preview will be generated and presented to the user. As shown in **Fig. Email - Quick Look**

Fig. Email - Quick Look



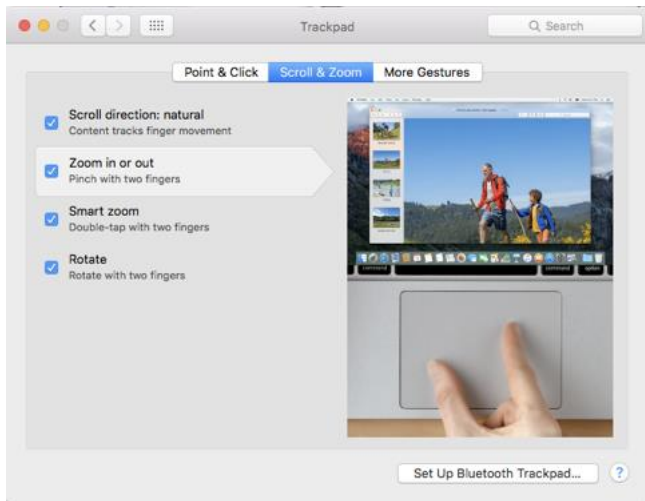
4. Ensuring the DocMoto Client is the computers main application focus; the user can use either the mouse or the arrow keys on the keyboard, to move up and down through the email listing and the Quick Look preview will display each email on selection. Once the user has finished previewing the Emails, select the “x” button in the top-left hand corner of the preview or select the spacebar.

Quick Look Tip & Trick:

Sometimes the Quick Look preview is not a sufficient size to view the contents of an email efficiently. Listed below are two tips & tricks which will assist users improve the size of: **(a)** The preview dialog **(b)** The preview content.

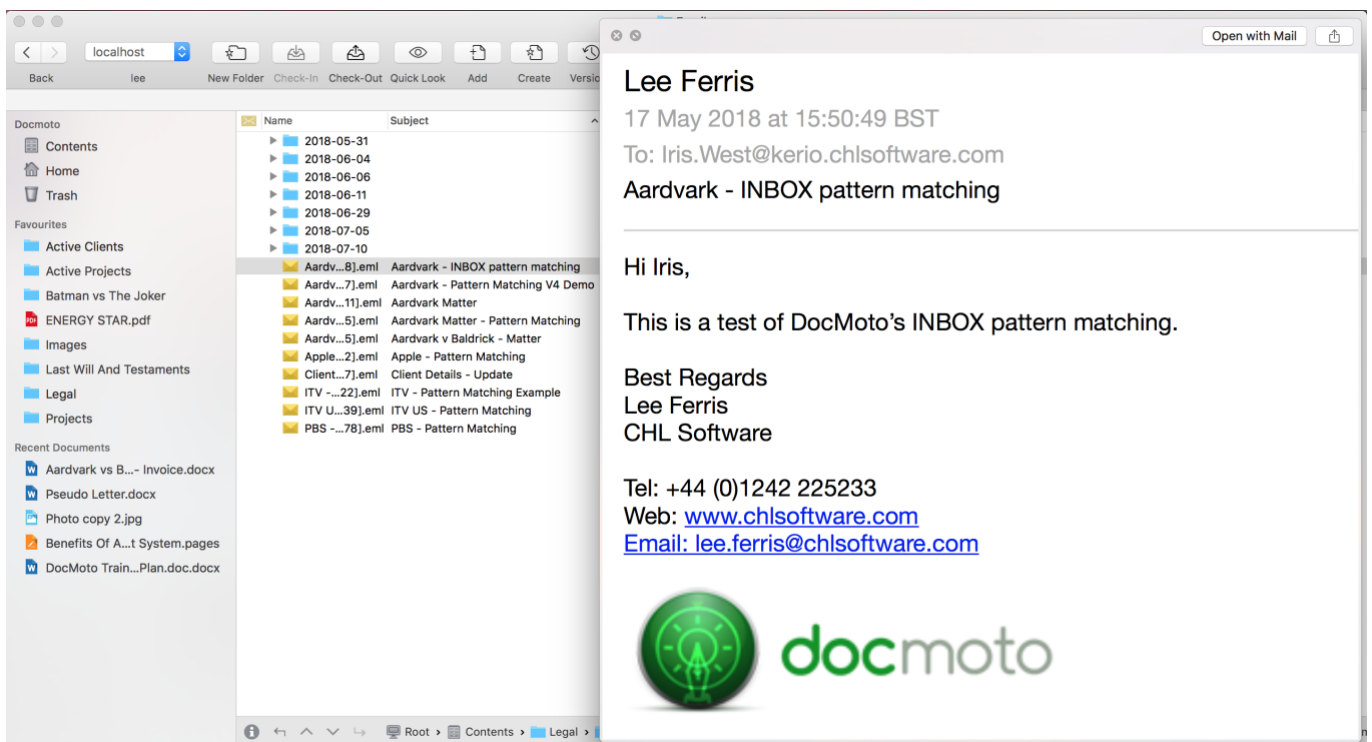
- (a) The Quick Look preview dialog can be resized by simply placing your cursor on the edge of the dialog (the mouse will change from a pointer to a resize icon) and drag the dialog until the user is satisfied with the size.
- (b) The content of the Quick Look preview can be resized with a gesture. Gestures are supported on: (i) The trackpad (see **Fig. Zoom gesture - Trackpad**) (ii) Magic Mouse.

Fig. Zoom gesture – Trackpad



If the user makes the Quick Look preview dialog the computers main application focus and then uses the "Zoom in or out" gesture - the content will zoom in or out accordingly. As shown in **Fig. Email - Quick Look with Zoom.**

Fig. Email - Quick Look with Zoom.



4. Searching Emails

DocMoto has a comprehensive search engine which enables users to search against: **(a)** File Name **(b)** Folder Name **(c)** Content **(d)** Meta-data or Tags **(e)** Combinations of **a+b+c+d**.

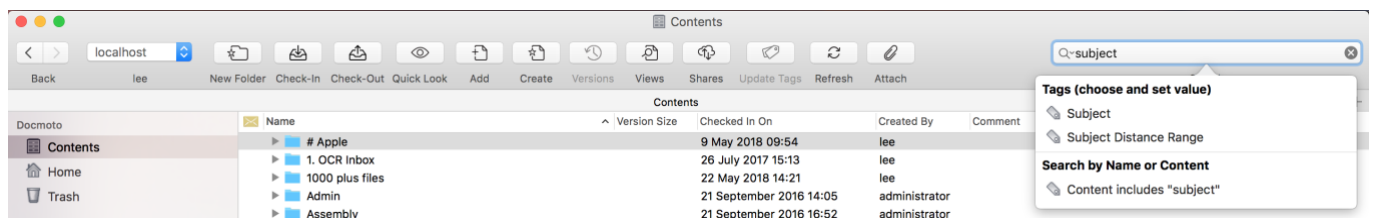
DocMoto offers predictive search capabilities to the end user so all that is required is for the end user to use a "key word" (key words = **a+b+c+d** listed above) within the search user interface and DocMoto will offer the most likely matches.

This section will illustrate to end users the best methods for Email related searching.

Searching - Meta-data or Tags:

1. Select the search user interface (top right hand corner of DocMoto Client user interface).
2. Type in a "key word" to load into the search engine. In this example the "key word" is "**Subject**" (Email) as shown below in **Fig. Searching - Keyword "Subject"**. The predictive search has suggested two matches both are meta-data or tags matches "**Subject**" & "**Subject Distance Range**". Select the "**Subject**" tag.

Fig. Searching - Keyword "Subject"



3. A search panel will be presented with the "**Subject**" tag (meta-data) field loaded into the search engine. As a "**Subject**" field could contain any text the search panel offers the end user the option to place some further criteria against the search. Specifically does the "**Subject**" field (a) Contains (b) Begins With (c) Ends With (d) Is.
4. In this example the criteria set for the search is the "**Subject**" contains the term "**Trial**" as shown below in **Fig. Searching - Subject Contains 'Trial'**.

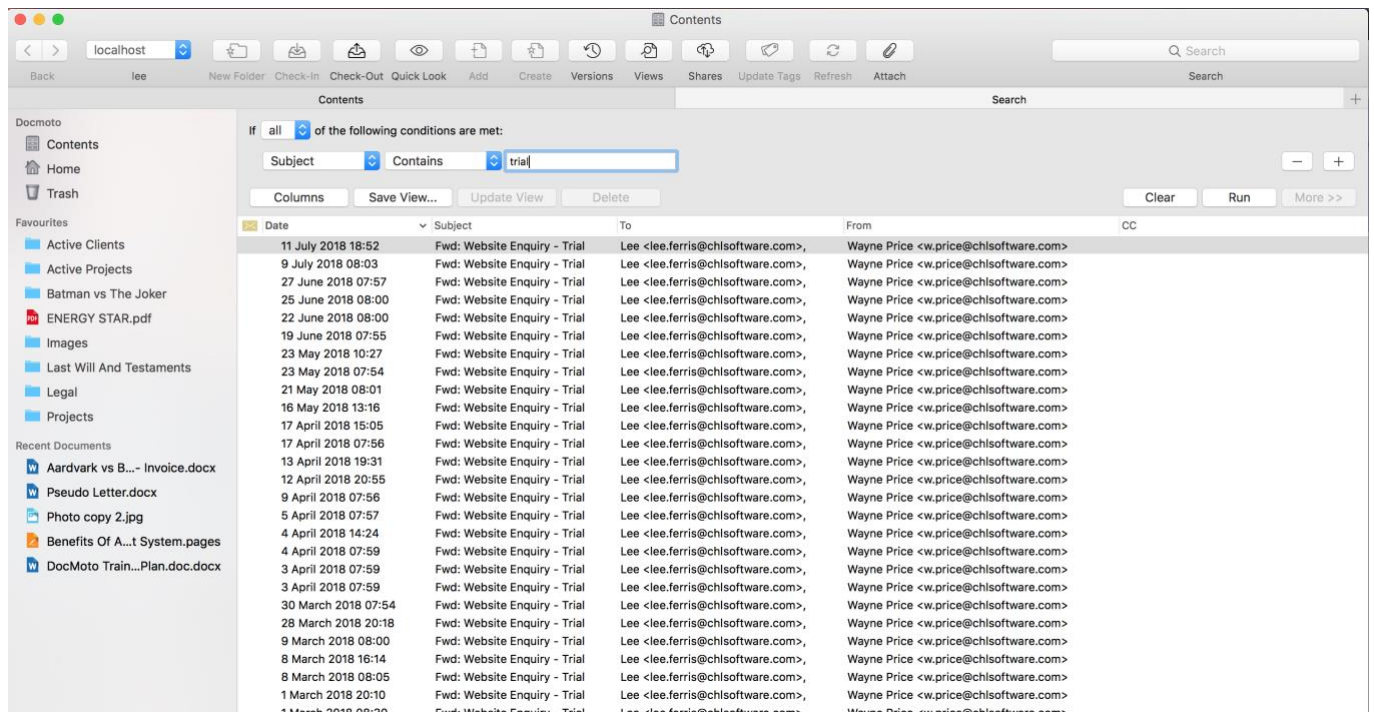
Search Tip & Trick:

Before users run a search it's advisable to consider whether the default column headers (Name, Version Size, Checked-In On, Created By, Comment) are appropriate for the information being retrieved. This section is about searching emails and the results posted by a search should reflect the media type one is searching i.e. Subject, Date, From, To, CC, etc. To change the columns:

1. Select the "**Columns**" button from the search panel.
2. A dialog will be presented with the default columns listed.
3. Select the columns to be removed and subsequently select the "-" button to remove.

4. Select the “+” button to add new columns.
5. A dialog will be presented with all the columns that are available within the system. Navigate to the “Emails” group heading and expand.
6. Select the columns from the “Emails” group to be added and select the “OK” button to confirm.
7. The new columns will be listed within the Display Columns dialog. These columns can be further sorted (in terms of user preference) by simply dragging columns up and down the list.
8. Select the “Close” button to confirm.

Fig. Searching - Subject Contains 'Trial'



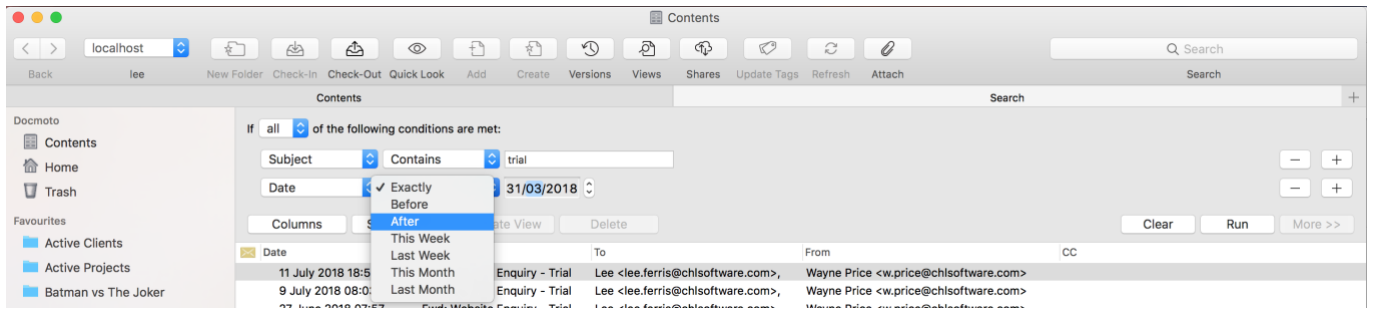
Searching - Refining a search:

The example search (above - **Searching - Subject Contains 'Trial'**) has yielded a reasonable amount of hits and can be refined by adding criteria. This section will illustrate how to refine a search using the example (**Searching - Subject Contains 'Trial'**) as the basis of this example.

To refine a search (**Searching - Subject Contains 'Trial'**):

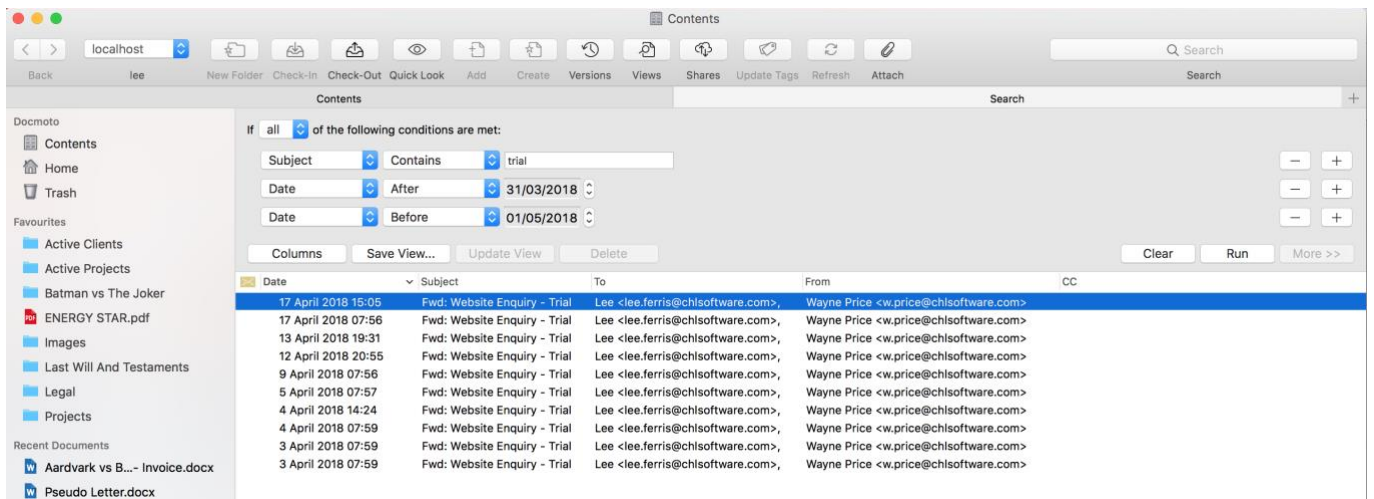
1. Select the “+” button within the search panel (top right hand corner).
2. The systems Tag library will be reloaded into the search engine and added as additional criteria.
3. Navigate to the Tag which will be used as additional search criteria. In this example - a date range will be added so that the system will retrieve all Emails which have an Email subject containing “Trial” between the dates “31/03/2018” & “01/05/2018” (where date = DD/MM/YYYY). With this in mind, the first additional criteria to be added will be “Date” listed under the “Email” section. As shown below in **Fig. Searching - additional Date criteria**”.

Fig. Searching - additional Date criteria”



4. Select the **“After”** condition and subsequently adjust the date-time picker to the appropriate date - in this example **“31/03/2018”**.
5. Select the **“+”** button within the search panel (top right hand corner).
6. The systems Tag library will be reloaded into the search engine and added as additional criteria.
7. Select the **“Date”** tag listed under the **“Email”** section.
8. Select the **“Before”** condition and subsequently adjust the date-time picker to the appropriate date - in this example **“01/05/2016”**.
9. Select the **“Run”** button to reissue the search with the new criteria.
10. The search will filter the original result set to match the new criteria. As shown in **Fig. Searching - Email Subject & Date range**.

Fig. Searching - Email Subject & Date range



Searching - Email Subject & Date range: Additional Note:

The columns within the search results view are fully sortable (ascending & descending). Sorting is applicable to one column only.

Searching - Email Content:

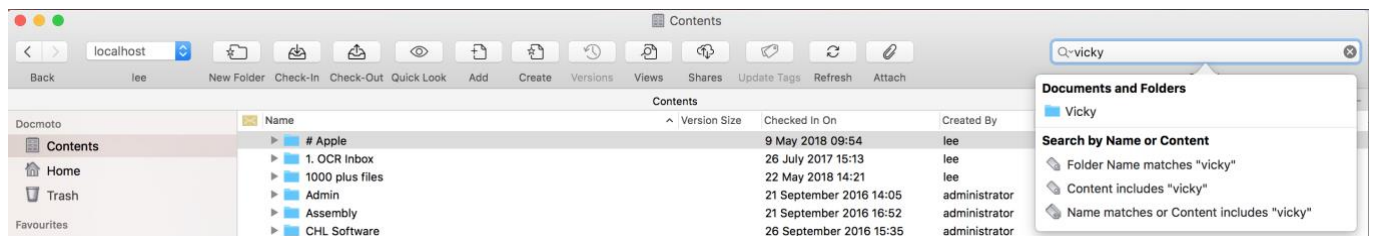
As previously stated, DocMoto offers predictive search capabilities to the end user so all that is required is for the end user to use a “key word” (key words = **a+b+c+d** listed above in the first Searching Emails section) within the search user interface and DocMoto will offer the most likely matches.

This section will illustrate to end users the best methods for Email content related searching.

Searching - Content:

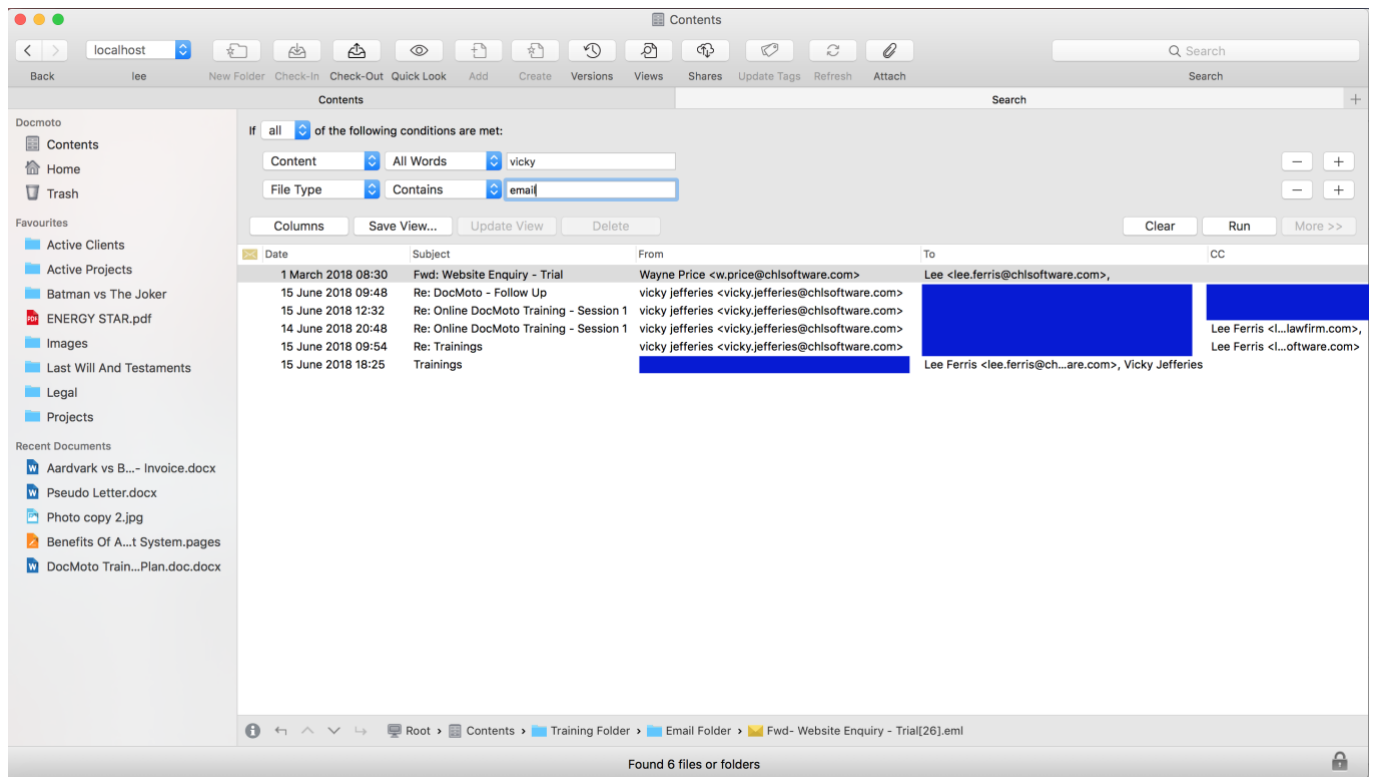
1. Select the search user interface (top right hand corner of DocMoto Client user interface).
2. Type in a “key word” to load into the search engine. In this example the “key word” is going to be content within an email, specifically the term (or word) “**Vicky**” as shown below in **Fig. Searching Email content**. The predictive search has suggested one match, a folder called “**Created by Vicky**” and offers additional options of: **(a)** Folder Name matches “vicky”, **(b)** Content matches “vicky”, **(c)** Name matches or Content matches “vicky”. Select the Content option.

Fig. Searching Email Content



3. On selection of the Content option the search engine will list all files (including emails) with the term (or word) “**vicky**” included within the file. **Note:** By default the content search will use an “**All Words**” condition. For a more detailed explanation of all conditions available for content searches, see section below labelled “**Search Content Tip & Trick:**”
4. To refine the file types so that only emails are listed - add additional criteria to the search by select the “+” button within the search panel (top right hand corner).
5. The systems Tag library will be reloaded into the search engine and added as additional criteria.
6. Select the “**File Type**” tag and leave the condition set to “**Contains**”.
7. Enter “**email**” within the “**File Type**” criteria.
8. Select the “**Run**” button to reissue the search with it’s new criteria.
9. The search will filter the original result set to match the new criteria. As shown in **Fig. Searching - Email Content using File Type filter**

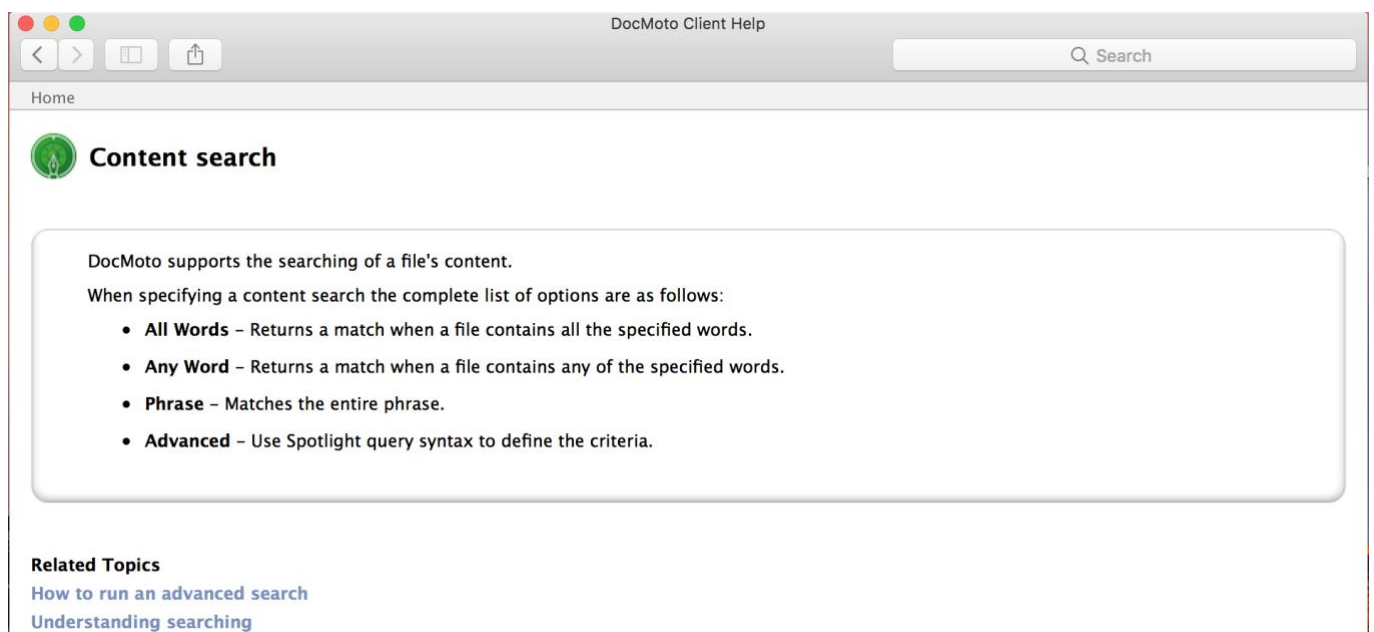
Fig. Searching - Email Content using File Type filter



Search Content Tip & Trick:

DocMoto offers a range of different content search conditions. The screenshot “Fig. DocMoto Help - Content Search” illustrates the range of possibilities.

Fig. DocMoto Help - Content Search



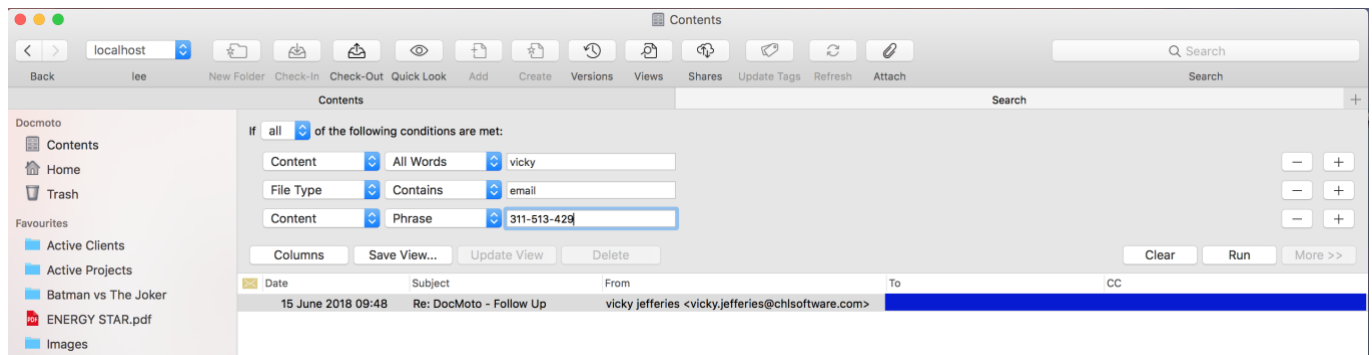
Searching - Refining a content search:

The example search (above - **Searching - Email Content using File Type filter**) has yielded a reasonable amount of hits and can be refined by adding criteria. This section will illustrate how to refine a search using the example (**Searching - Email Content using File Type filter**) as the basis of this example.

To refine a search (**Searching - Email Content using File Type filter**):

1. Select the “+” button within the search panel (top right hand corner).
2. The systems Tag library will be reloaded into the search engine and added as additional criteria.
3. Navigate to the Content Tag which will be used as additional search criteria. In this example - the additional criteria is going to be additional content within an email, specifically the phrase “311-513-429” as shown below in **Fig. Searching Email content - refined**. Select the “Run” button to reissue the search with it’s new criteria.

Fig. Searching Email content - refined



5. Supplementary Section

Using DocMoto Reports to carry out complex boolean content searches.

One of the key new features released in DocMoto 3.6 is reporting. Designed specifically to provide essential management information the reporting feature is another tool to help increase efficiency, improve customer service and drive down costs. For more details - click [here](#).

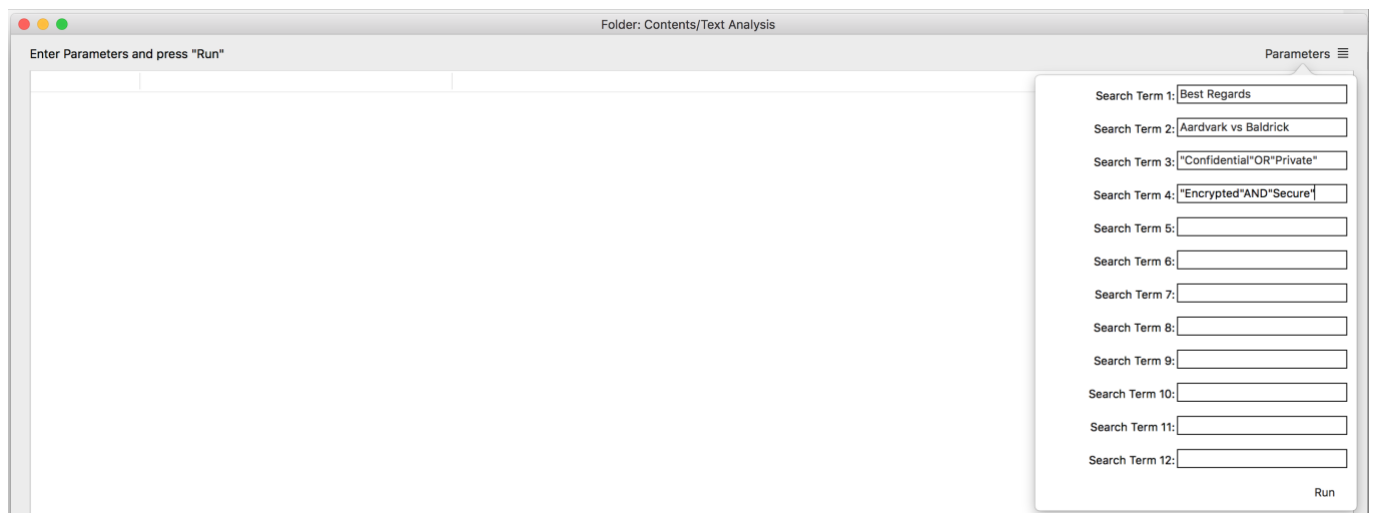
This section will illustrate the methods for Email content related searching using DocMoto's reporting features.

DocMoto is shipped with a report named **"Text Analysis"** which can be found under the **"Reports"** menu, specifically - **"Reports/Folder: <Name of folder>/Text Analysis"**. For more details on the **"Text Analysis"** report - click [here](#).

To run the report which allows users to carry out complex boolean content searches:

1. Select the **"Text Analysis"** report from the **"Reports/Folder: <Name of folder>/"** menu item.
2. A Dialog will be presented enabling the user to enter multiple terms or phrases as part of a comprehensive content search. As shown below in **Fig. Text Analysis - Content Searching**.

Fig. Text Analysis - Content Searching



3. Enter the terms or phrases to content search and then select the **"Run"** button. In this example - **"Best Regards"** & **"Aardvark vs Baldrick"** & **"Confidential"OR"Private"** & **"Encrypted"AND"Secure"** are the terms used as the search conditions. **"Best Regards"** is used to ensure lots of emails are returned, **"Aardvark vs Baldrick"** & **"Confidential"OR"Private"** & **"Encrypted"AND"Secure"** are used as a control conditions. As shown above in **Fig. Text Analysis - Content Searching**.
4. A report is generated listing all the files that match one or both of the conditions set. As shown below in **Fig. Text Analysis - Results**.

Fig Text Analysis - Results.

Name	Last Checked-In	Last Checked-In By	Best Regards	Aardvark vs Baldrick	"Confidential"OR"Private"	"Encrypted"AND"Secure"
Standard Rule Set [16454].eml	10 July 2018 14:43		✓	✓		
Standard Rules [16391].eml	5 July 2018 17:30		✓	✓		
V US - Std Rules [16327].eml	29 June 2018 16:43		✓	✓		
Client Briefing [16516].eml	Today, 13:52		✓	✓	✓	✓
Re- Website Enquiry - Trial(1).eml	Today, 10:44	lee	✓			
Re- Website Enquiry - Trial.docx	Today, 10:44	lee	✓			
Engagement Agreement.docx	2 October 2017 17:05				✓	
Confidentiality Agreement.docx	3 July 2018 14:50	lee			✓	
Engagement Letter Template.docx	21 July 2017 14:26	lee			✓	
Engagement Letter Template x.docx	21 July 2017 16:17	lee			✓	
Monthly Status Report.docx	11 August 2017 17:17	lee			✓	
Monthly Status Report x.docx	22 September 2017 12:05	lee			✓	
Monthly Status Report.docx	7 December 2017 12:26	lee			✓	
Standard Rule Set [16473].eml	11 July 2018 10:55		✓			
Theta Project - Check List [15895].eml	1 June 2018 14:46		✓			
Theta Project - Standard Rules [8094].eml	17 May 2018 13:59		✓			
Re: Theta Project - Standard Rules [8112].eml	17 May 2018 16:43		✓			
Theta Project - Pattern Matching [8090].eml	17 May 2018 12:26		✓			
Test Test [16065].eml	11 June 2018 15:04		✓			
Project Theta - INBOX pattern matching [8103].eml	17 May 2018 15:22		✓			
Pattern Matching [16476].eml	11 July 2018 11:04		✓			
Confidentiality Agreement.docx	11 July 2018 10:37	lee			✓	
Standard Rule Sets [16272].eml	21 June 2018 17:07		✓			
Omega Pattern Test [16249].eml	19 June 2018 11:05		✓			
Pattern Matching [16283].eml	21 June 2018 17:48		✓			

- The report will have the following columns: **(a)** Path, **(b)** Name, **(c)** Last Checked-In, **(d)** Last Checked-In By, **(e)** Current Size **(f)** Comment AND the search terms in order of preference, formatted as follows - **"search term"**, in this example – **Best Regards, Aardvark vs Baldrick, "Confidential"OR"Private", "Encrypted"AND"Secure"**.
- The files which contain the search term are marked with a **"✓"** to signify the file does contain the term. In this example, the file (Email) highlighted should be the Email the user is most interested in as all conditions evaluate to true.

Report Tip & Trick:

Users can use the Quick Look preview within any report generated by the DocMoto system. As shown below in **Fig. Reports - Quick Look**.

Ensuring the report is the computers main application focus; the user can use either the mouse or the arrow keys on the keyboard, to move up and down through the report listing and the Quick Look preview will display each file on selection. Once the user has finished previewing the files, select the "x" button in the top-left hand corner of the preview or select the spacebar.

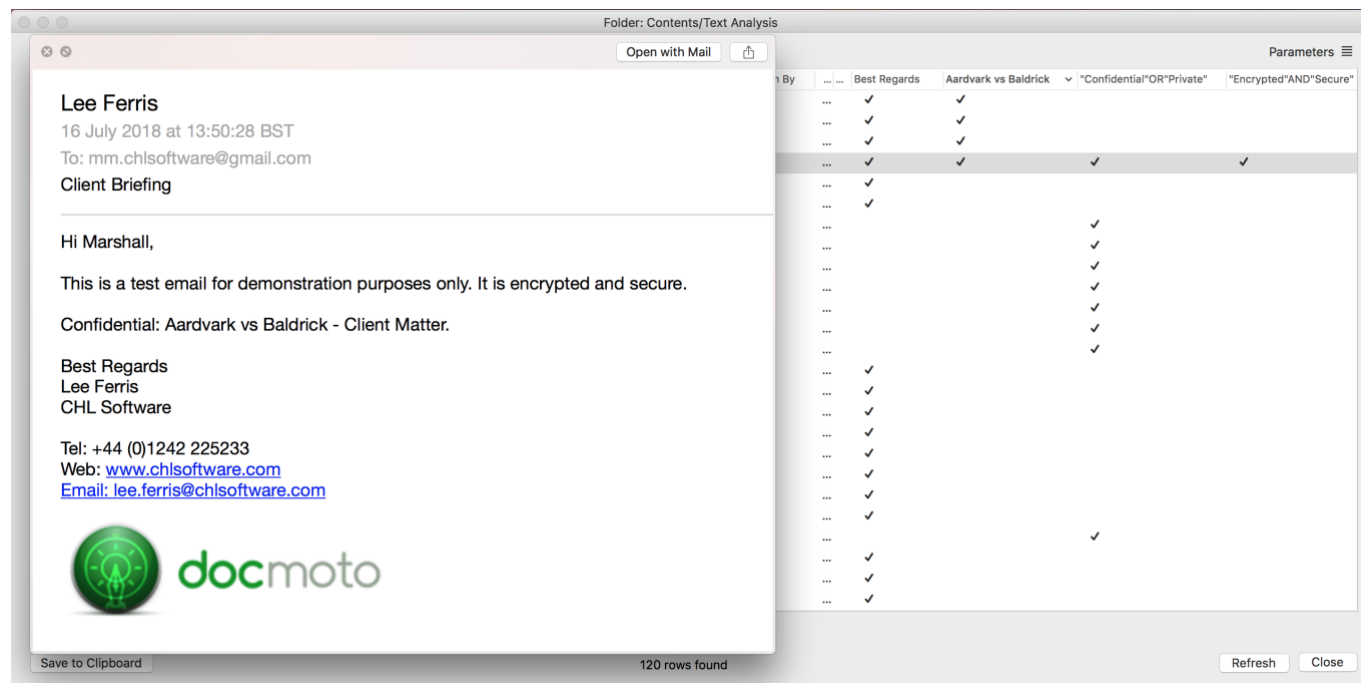
Fig. Reports - Quick Look

The screenshot displays a software interface with a window titled "Folder: Contents/Text Analysis". On the left, an email preview is shown for "Lee Ferris" dated "16 July 2018 at 13:50:28 BST". The email content includes a "Client Briefing", a greeting to "Hi Marshall", a disclaimer "This is a test email for demonstration purposes only. It is encrypted and secure.", and contact information for Lee Ferris at CHL Software. The Docmoto logo is also present. On the right, a search results table is visible with columns for "By", "Best Regards", "Aardvark vs Baldrick", "Confidential OR Private", and "Encrypted AND Secure". The table contains multiple rows, with one row highlighted in blue. At the bottom of the interface, it indicates "120 rows found" and includes "Refresh" and "Close" buttons.

The example above (**Fig. Reports - Quick Look**) illustrates a preview of the email highlighted in **Fig Text Analysis - Results** (above). Specifically the search terms **Aardvark vs Baldrick**, **"Confidential"OR"Private"**, **"Encrypted"AND"Secure"**.

With the Quick Look preview open users can also zoom in and out as stated above in the **Quick Look Tip & Trick:** section. As shown below in **Fig. Reports - Quick Look Zoom In**.

Fig. Reports - Quick Look Zoom In



Additional Note:

All DocMoto reports can be exported as a CSV file by:

1. Select the "Save to Clipboard" button in the bottom left hand corner of the report.
 2. Open any spreadsheet application (i.e. Microsoft Excel, Apple Numbers, Open Office Spreadsheet, etc) and create a new empty spreadsheet
 3. Select all cells and subsequently select the "**Paste**" option.
- The spreadsheet will be populated with the data from the DocMoto report.