OUTLOOK ATTACHMENT EXTRACTOR 3

PROGRAM HELP

1 TABLE OF CONTENTS

2   START

Outlook Attachment Extractor is a flexible solution to extract attachments from emails received with Outlook automatically. The program allows you to use properties of emails for dynamic naming of the storage folder or file name of the attachment to be extracted. For example, you can integrate the receipt year or the email sender name into the folder name. By using the filter, emails to be processed can be strictly limited. All settings made, for example, the Outlook folders to be monitored or the filter criteria are stored in individual profiles.

The help describes the features of the program and gives instructions for using Outlook Attachment Extractor.

3   MAIN MENU

3.1   MENU ENTRIES OF THE GROUP MENU

3.1.1   Options...
Use this menu item to open the dialog box for customizing the program options.

3.1.2   Enter license key...
This menu entry opens the registration dialog to enter the license key respectively to unlock the full version of the program.

3.1.3   Help
Clicking on this menu item opens the online help in the default browser. To use the online help, an active Internet connection is required.

3.1.4   About...
Using this menu item, the dialog window to display the program version of the license state will be opened. This dialog window contains also links to contact the technical support, the product's web page etc.

3.1.5   Other

3.1.5.1   Create error report
In case of technical problems, you can create a bug report by using this menu item. The created file is named "Outlook Attachment Extractor - error report" and located on the Desktop. You can then send us the error report attached to an email with a short description of the problem.

3.1.5.2   Backup application data...
This menu item allows you to store the entire application data (profiles, log, etc.) as ZIP archive in a directory to be selected. After saving the ZIP archive is highlighted in the Explorer.

3.1.5.3   Restore application data...
This menu entry can be used to restore previously saved application data.

3.1.5.4   Restore attachments
Opens a dialog window for mass recovery of attachments that have been replaced by a link file in the e-mail (ATTLNK file).

3.1.5.5 *Adjust path in link files*

Opens a dialog window for mass adjusting the path of outsourced attachments. This allows you to view or restore the stored attachments even after moving the storage folder.

3.1.6 Exit

Use this menu item to exit the program.

3.2 MENU ENTRIES OF THE GROUP PROFILES

3.2.1 Apply all profiles subsequently...

This menu entry opens a new window in which the period for an email receipt date can be defined. After confirmation, all emails received during this period (in the monitored folders) are subsequently processed using all active profiles. The limitation of the period is optional.
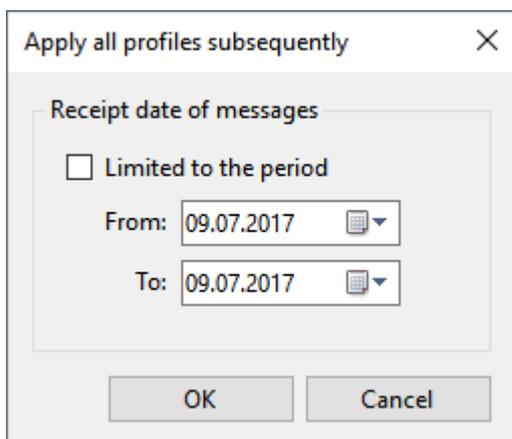
3.2.2 Activate all profiles

With this button, you can set all profiles to the status Active, i. e. the profiles are applied to newly received emails.

3.2.3 Deactivate all profiles

This button sets all profiles to the status Inactive, i. e. the profiles are ignored when processing newly received emails.

3.2.4 Delete all profiles

Clicking this button deletes all profiles after a confirmation prompt.

3.2.5 Import profiles from CSV file...

This menu item is used to import profiles from a CSV file. First, select the file to import, and then assign the appropriate profile properties to the contained columns. The following profile properties must be assigned:

- Email folder(s) to monitor
- Base directory of the storage location

For logical values applies: Specify the value 1 for an activated and 0 for a deactivated check box

For enumerations/pick lists applies: The value to be specified corresponds to the zero-based index within the list

Example:
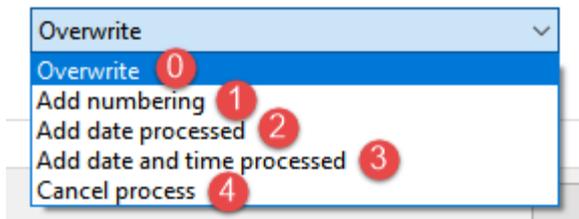
Note: Please ensure that the file to be imported is not opened in Excel and therefore locked. Multiple email folders to be monitored within a profile to be created must be separated by a semicolon. ***The selected profile can be exported as template into a CSV file via the context menu of the profile list.***
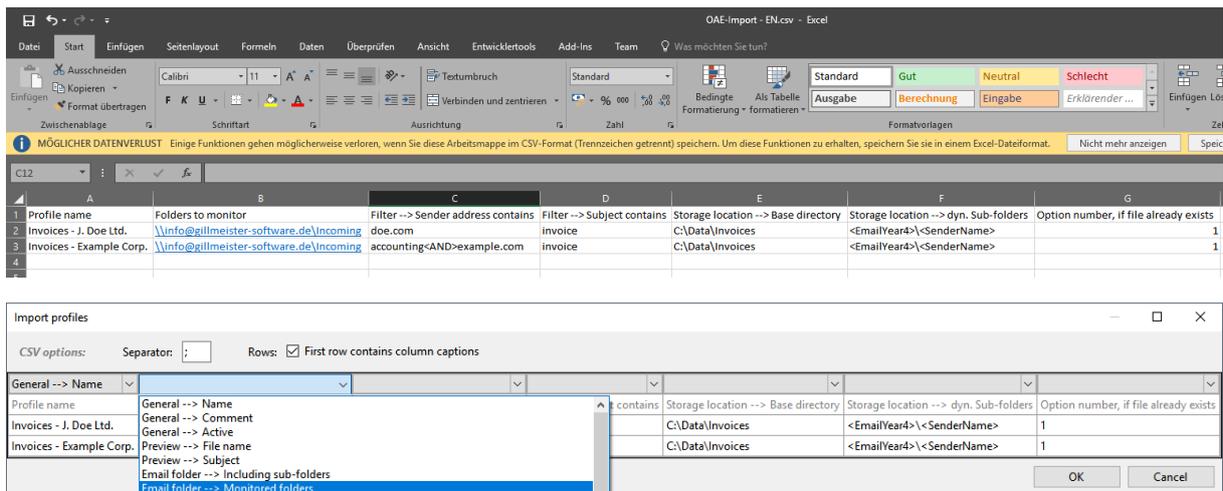
3.3   Toolbar buttons "Profile"

3.3.1   New…
Clicking this button opens the dialog window for creating a new profile.

3.3.2   Edit…
This button opens the window for editing the settings of the currently selected profile in the list. Alternatively, double-click the profile you want to edit.

3.3.3   Duplicate
Creates a copy of the selected profile. To create a larger number of profiles, you should also consider the CSV import of profiles.

3.3.4   Catch up…
Clicking this button opens a new window in which the period for an email receipt date can be defined. After confirmation, all emails received during this period (in the monitored folders) are subsequently processed using the currently selected profiles. The limitation of the period is optional.

3.3.5   Activate
With this button, you can set the selected profiles to the status Active, i. e. the profiles are applied to newly received emails.

3.3.6   Deactivate
This button sets the selected profiles to the status Inactive, i. e. the profiles are ignored when processing newly received emails.

3.3.7 Delete

By clicking the button, you can delete the selected profiles after a confirmation prompt.

4 PROFILE LIST
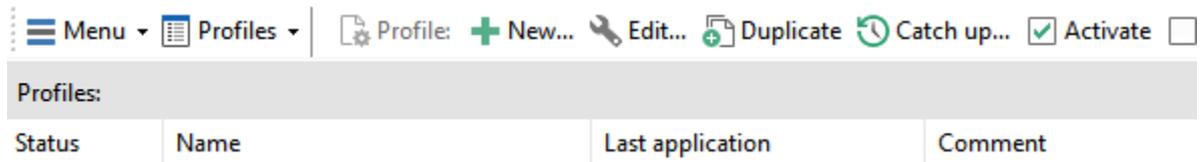
4.1 STATUS

Newly created profiles are given the status "active". All profiles with this status will be applied to incoming emails. To disable a profile, click the check box at the beginning of each row. The status then changes to "inactive".
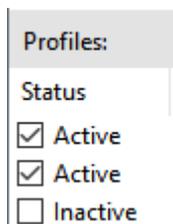
4.2 NAME

The name of the profile.

4.3 LAST APPLICATION

Shows date and time of the last successful application of the profile.

4.4 COMMENT

An optional comment to the profile.

4.5 CONTEXT MENU

The context menu of the profile list contains the following entries:

- Select all
- Select nothing
- Invert selection
- Export profile to CSV file

5 PROFILE SETTINGS

5.1 GENERAL

5.1.1 Name

Here you can give the profile a meaningful name.

5.1.2 Comment
Optionally, you can enter a comment that will be displayed in the profile list.

5.2 EMAIL FOLDER
Here you can add one or more email folders. The profile is applied to all added email folders, if the specified filter criteria are met. When the option "Including sub-folders" is activated, additionally, all emails from folders which are subordinate to the added folders are processed.

5.3 FILTER
Here you specify the (optional) conditions that must be met by the email properties. Only if all filter criteria are met, the email is processed. You can use logical comparison operators to set several conditions for an email property. In this case, the "AND" operator takes precedence over the "OR" operator. The filter is case insensitive - no distinction is made between uppercase and lowercase letters of the entered terms. Wildcards as the asterisk are not supported.

5.3.1 Sender name contains/does not contain
Enter an optional name or partial name of the sender of the email to be processed.

5.3.2 Sender address contains/does not contain
Enter an optional email address or a partial address of the sender.

5.3.3 Recipient name contains/does not contain
Enter an optional name or partial name of the recipient of the email to be processed.

5.3.4 Recipient address contains/does not contain
Enter an optional email address or a partial address of the recipient.

5.3.5 Subject contains/does not contain
Enter here optional the subject or a part of a subject.

5.3.6 File name contains/does not contain
Enter here an optional file name or part of a file name of an email attachment.

To process only certain file types such as PDF files, simply enter the term ".pdf". If a specific word (for example, invoice) should additionally be contained in the attachment filename, the entry would look like this: .pdf<AND>invoice

If the option "Storage location - Save all attachments into the same folder" is enabled, the filters Filename Contains/Does Not Contain are only used to define an attachment to be used for dynamic

naming, i. e. to use certain parts of the name of the attachment defined by the filter for the folder or file name.

5.3.7 Message header contains/does not contain

Enter here optional, for example, an email address or a part of an email address. This filter option is, inter alia, helpful when using alias email addresses. Normally, you should prefer the filter for the sender or recipient address.

5.3.8 Message text contains/does not contain

Optionally enter the message text or a part of the message text.

5.3.9 Attachment's file size

Optionally, specify here the allowed file size of the attachment. The default setting is "not evaluated". The following restrictions can be defined:

- File size is less than
- File size is greater than
- File size is between two values

In the program options, you can specify whether the value displayed in Outlook or the actual file size should be used to determine the file size.

5.4 STORAGE LOCATION

Here you determine where the extracted attachments should be stored. In the input field labeled "Directory" you specify the base folder e.g., "C:\My email attachments\". This path cannot contain dynamic name parts. The input field "Folder" can be left blank - but there is also the possibility to assemble the folder name from parts of the respective email properties such as the receipt year. More levels of subfolders can be formed by adding the appropriate path separator "\". The input field for the file name can also be left blank or contain placeholders for individual email properties. The preview shows the complete path to let you check the result in advance. The spaces at the beginning and end of each folder are only for better clarity and are not included in subsequent use of the profile. If a file with the specified name already exists, the chosen name collision rule will be applied.

5.4.1 Folder

Select the base directory where the attachments should to be stored by clicking on the button with the label "...".

5.4.2 Subfolders

Use the Link Menu above the input field to select email properties that should be used to create an optional subfolder structure within the base directory.

Folder:

D:\Geschäftliches\Rechnungen\Eingang   [...]

Subfolder(s) (dynamically generated from ...)   Insert placeholder

<EmailYear4>\Hetzner

File name (dynamically generated from ...)   Insert placeholder

5.4.3   File name

Use the Link Menu above the input field to select email properties from which the file name should be generated. If you leave this field empty, the original name of the email attachment is used.

5.4.4   Preview File Name

Enter here optional the expected (or a similar) file name of the attachment to be processed. This can be useful if you want to compose a new file name from parts of the original attachment file name. To change the preview file name, click on "Preview".

5.4.5   Preview Subject

Enter here optional the expected (or a similar) subject of the emails to be processed. This can be useful if you want to use parts of the subject for the folder or file name. To change the Preview Subject, click on "Preview".

5.4.6   Save all attachments into the same folder

This option is required if the storage location is to be dynamically generated from the name or a part of the name of a specific attachment (for example, if an order number should be part of the name of a sub-folder) and all additional attachments should be stored into the same folder. In this case, enter into the field with the label "File name contains" the name or a part of the name of the attachment to be used as reference and enable the option.

If this option is enabled, the filters Filename Contains/Does Not Contain are only used to define an attachment to be used for dynamic naming, i. e. to use certain parts of the name of the attachment defined by the filter for the folder or file name.

5.4.7   Name collisions

If a file with the distinguished name already exists, the collision rule determined here will be applied. Decide whether the program should: overwrite the file, add a number or the processing date to the name, or cancel the operation.

5.5   ZIP ARCHIVES

5.5.1   Extract files from ZIP archives

If this option is enabled, all files in a ZIP archive are extracted. If necessary, a password for the ZIP archive can be stored. By using the optional filter for the name of the files to be extracted, these can be restricted. You can also specify whether the ZIP archive should additionally be stored in the storage folder.

5.6   SUBSEQUENT

5.6.1   Mark message as read

Here you can set whether the email should be marked as read after successful processing. If the access type "Use add-in" is selected in the program options (section Outlook), it can also be distinguished whether a requested read receipt will be sent. Otherwise, the Outlook options to send a read receipt apply.

5.6.2   Move email

Here you can specify whether the email should be moved into a specified email folder after successful processing.

5.6.3   Forward email

Up to three email forwardings can be set up here. For each forwarding, you can specify which of the original attachments to include.

5.6.4   Replace extracted attachments with links

If this option is activated, the stored attachments of the email will be replaced by a link file. This contains the path to the file and has the file extension ".attlnk". By double-clicking on the replaced attachment of the email, a drop-down menu appears with the following options:

- Open extracted file
- Select extracted file in Explorer
- Restore all email attachments

In the program options on the tab Other, you can specify that instead of displaying the selection menu, one of the three options above is always executed.

The stored attachments are not replaced in the following cases:

- The email is encrypted.
- The extracted file is part of a ZIP archive and the option "Also save the ZIP archive in the storage folder" has not been activated.

5.6.5   Run program

For automatic further processing, the path of the extracted attachment can be passed to a program as parameter. Here, you can optionally enter the path of a program that should be executed after the successful extraction of an attachment.

5.6.6   Parameter

Optionally enter one or more parameters that should be passed to the program to be executed by using the link menu.

5.6.7   Play sound

Here you can optionally select a wave file that you want to play after successful processing.

6   LOG

6.1   LOG LIST

The log list contains information about all processed emails within the period that is specified in the program options. By default, this period is 30 days. With a click on the respective column header, the sorting of the list can be adjusted.

The context menu contains the following entries:

- Select saved file in Explorer
  (opens the Explorer and selects the saved file)

- Hide selected entries
- Hide all entries

7 PROGRAM OPTIONS

7.1 GENERAL

Here you can define settings such as the language of the user interface and the starting behavior.

7.2 OUTLOOK

7.2.1 Type of remote control

Determines how Outlook will be accessed. The following options are available:

- Use add-in
  (This is the recommended type of access for older version of Outlook (2007 and 2010). In case there are problems or conflicts with other Outlook add-ins, the type should be changed to "direct access", which generally works fine.)

- Directly access Outlook
  (Typically, this type of access works fine and is especially recommended when using Outlook 2013 or newer. However, in case of an inactive antivirus program or outdated virus definitions, it can happen that a warning window appears with a reference to accessing Outlook. Typically, this window will appear only once at startup. This can be prevented by either customizing the Outlook security settings or using an active antivirus program with up-to-date virus definitions whose status is also recognized by the Outlook Trust Center and the Windows Security Center.)

7.2.2 Outlook instance

Determines whether the program creates its own Outlook instance for automation. The following options are available:

- Use own instance
  (This option should be used if there are multiple Outlook profiles available to logon to. The program will create its own Outlook instance and logon to the standard profile.)

- Use user's instance
  (This option can be used if there is only one Outlook profile that the program can logon to. There are no advantages to using this option - depending on the individual system, one or the other variant may be better supported.)

7.2.3 Independently call the "Send/Receive all" function to receive new emails

If this option is activated, the program automatically calls the Outlook function "Send/Receive all" at the interval set below, if Outlook is not opened.

7.3 PROCESSING

7.3.1 Check Interval

Determines at what interval (in seconds) "Outlook Attachment Extractor" checks whether new messages have been received.

7.3.2 Suppress error messages during processing

By default, errors that occur when saving an attachment are displayed in a dialog box. The program flow is interrupted until acknowledgement is confirmed (by clicking OK). Activating this option will disable this behavior. Any errors that may have occurred are then only visible in the log.

7.3.3 Process only one message per (regular) run

With this option you can limit the number of messages to be processed per run. In addition, when using the Catch-Up function with this option activated, a pause of the length of the defined interval is made after each processed email.

7.3.4 Cancel the execution of the task after one minute

This option should only be activated if the program hangs in the processing of a particular email. Some emails may differ from the standard or contain corrupted information. When the option is activated, the time available to process an email is limited. However, this increases the likelihood that your Outlook installation cannot be automated by the program.

7.3.5 Set file date of saved attachments to email receipt date

If this option is activated, the file date (date of creation, last modification and last access) of the saved attachments is set to the date of receipt of the respective email.

7.4 FILTER

Here you can specify whether the value displayed in Outlook or the actual file size should be used to determine the file size. Since the calculation of the actual file size is considerably more expensive, it is recommended to use the value displayed in Outlook. The option "Insert ZIP archive name as prefix into the name of the extracted files" allows the unique naming of the files to be extracted if their names are always the same and instead the names of the ZIP archives vary.

7.5 LOG

7.5.1 Maximum period of storage (in days)

Here you can specify the retention period of the log entries. The value set here determines the oldest recorded email receipt date and is relevant if emails are moved manually or subsequently into the monitored folder. Subsequently moved emails are only processed if their date of receipt is newer than the oldest email date recorded in the log.

7.5.2 Color differentiation of the entries

If you activate this option, the log list entries are colored alternately, depending on the current sort criterion.

7.6 OTHER

7.6.1 Replace non-alphanumeric characters with an underscore in e-mail properties that are used for naming

This option serves to simplify the automated further processing of the attachments, since only letters, numbers, underscores and a dot to separate the file extension remain in the file name.

7.6.2 Remove the following prefixes from the subject, if it is used for the folder name

The option allows to remove subject prefixes such as "FW:", "Re:" etc. from a subject to be used for the folder name. Separate multiple prefixes with a semicolon.

7.6.3   When double-clicking on a replaced attachment

By double-clicking on the attachment that has been replaced with a link file, per default a drop-down menu with the following options appears:

- Open extracted file
- Select extracted file in Explorer
- Restore all email attachments

Here you have the option to specify instead one of the actions listed above, which should be executed without further asking.

8   EULA

The license agreement can be found at the following address: https://www.outlook-attachment-extractor.com/download.aspx