

HP Records Manager

Software Version: 8.2

ExchangeLink Installation and Setup

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Introduction

About HP Records Manager ExchangeLink

HP Records Manager ExchangeLink enables users to file email items to a mail folder, which checks them in to the equivalent HP Records Manager container record.

This enables users to file mail items quickly to frequently used HP Records Manager containers without the need to have the HP Records Manager client open on their computers.

Users can set up and manage multiple email links of this type, as required.

HPRM_ExchangeLink_x64.msi installs two services on a server that enable this HP Records Manager functionality.

About this document

This document provides information for you to install and configure HP Records Manager ExchangeLink.

ExchangeLink prerequisites

For prerequisites, see **RM8.2_Spec.pdf** in the HP Records Manager installation folder.

Installation and configuration

Creating the domain user

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 ExchangeLink in the same domain as the Exchange Server, the account to run ExchangeLink 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 ExchangeLink 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 **HP Records Manager Workgroup Service** in your environment, then use HP Records Manager Enterprise Studio **General – Miscellaneous** option **Trusted server accounts ...** to add the user to the trusted accounts list.

Installing ExchangeLink

Warning



Before upgrading HP Records Manager ExchangeLink, stop the HP Records Manager ExchangeLink Admin Service and the HP Records Manager ExchangeLink Synch Service. After running the HPRM_ExchangeLink_x64.msi (see below for details), ensure both HP Records Manager ExchangeLink Services are started.

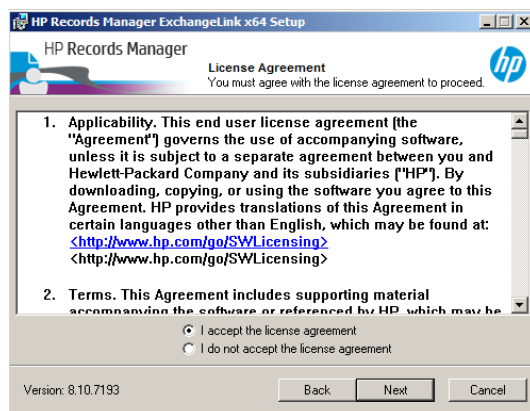
1. Using the credentials of the domain and HP Records Manager user of user type **Administrator**, install **HPRM_ExchangeLink_x64.msi** from your installation media from the command prompt.

The **Welcome** dialog appears:



2. Click **Next**.

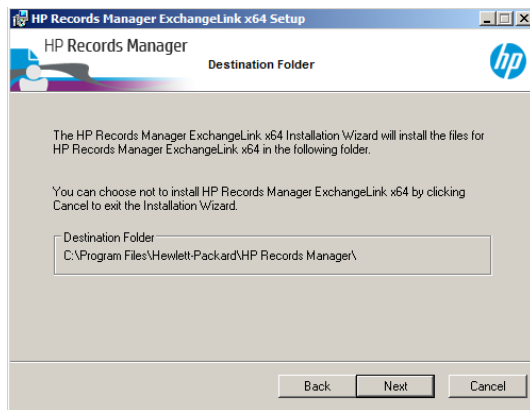
The **License Agreement** dialog appears:



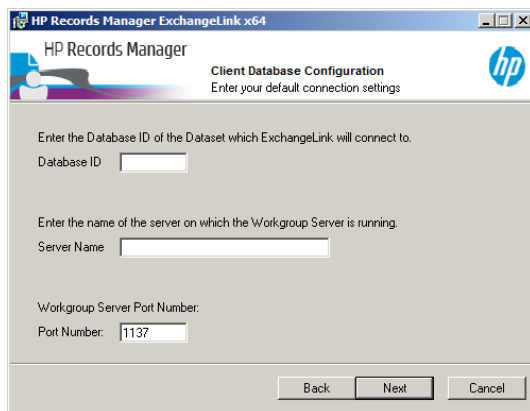
3. Select **I accept the license agreement** and click **Next**.

The **Destination Folder** dialog appears:

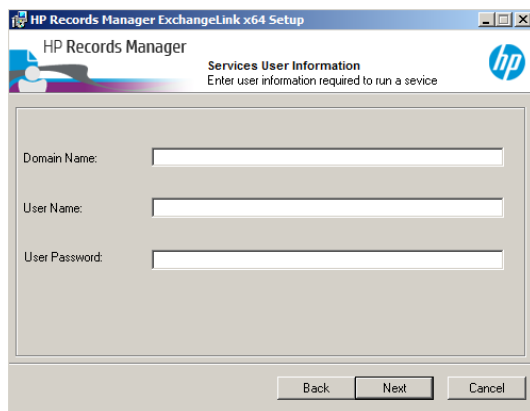
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4. Click **Next** to keep the default installation folder (recommended). The **Client Database Configuration** dialog appears:



5. Fill in the fields and click **Next**:
 - **Database ID** – HP Records Manager dataset ID that ExchangeLink should link to the Exchange Server mail accounts
 - **Server Name** – the HP Records Manager Workgroup Server ExchangeLink should connect to
 - **Port Number** – the Workgroup Server port number to use. Default: **1137**.
6. The **Services User Configuration** dialog appears:

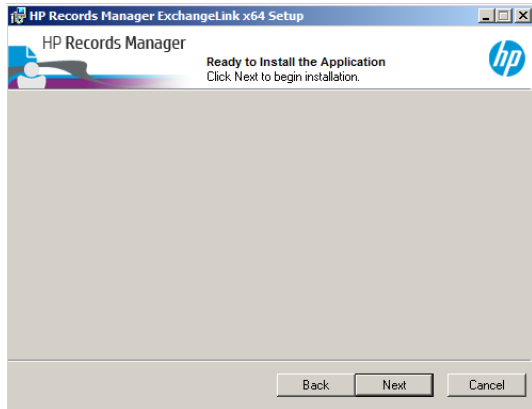


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7. Fill in the fields and click **Next**:

- **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 ExchangeLink is installed.
- **User Password**

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



9. Click **Next**.

The confirmation dialog appears:



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

- **HP Records Manager ExchangeLink Admin Service**
- **HP Records Manager ExchangeLink Synch Service**

The installation has also created the folders:

- **C:\HP Records Manager\ExchangeLink**
- **C:\Program Files\Hewlett-Packard\HP Records Manager\ExchangeLink.**

The **HP Records Manager ExchangeLink Admin Service** starts automatically. If it does not, the installer will notify you and you should try to fix the problem, for example, missing permissions.

10. Use the ExchangeLink 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.

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11. Use the Windows **Services** function to start the HP Records Manager ExchangeLink Synch Service
12. As an HP Records Manager administrator, use the **Administration – System Options – Features** tab to select the feature **Email Links** and click **OK**
13. Restart the HP Records Manager clients, if they were running, to enable the new functionality.
HP Records Manager users with an electronic address against their user profile and a matching email account on the Exchange Server can now create links to HP Records Manager containers using the record context menu **Send To – Add To Email Links**.