

novomind iMailLight™

User's Guide

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Contents

1	INTRODUCTION.....	3
2	SYSTEM REQUIREMENTS	4
3	INSTALLING IMAILLIGHT	5
4	STARTING IMAILLIGHT FOR THE FIRST TIME	6
5	USING IMAILLIGHT	8
5.1	"CATEGORIZATION" STATUS BUTTON	8
5.2	"REASSIGN"	8
5.3	CONFIGURATION DIALOG	9
5.3.1	"CATEGORIES" TAB	9
5.3.2	"OTHER" TAB	9
5.3.3	"STATISTICS" TAB.....	10
5.3.4	"INFORMATION" TAB.....	10
6	ANSWERING E-MAILS USING SUGGESTED RESPONSES	11
6.1	CREATING AND ALLOCATION OF RESPONSE TEMPLATES.....	11
6.2	GENERATING E-MAIL RESPONSES AUTOMATICALLY	12
7	ERROR MESSAGES.....	14

1 INTRODUCTION

iMailLight is an application which can be integrated into Microsoft Outlook to enable e-mails to be categorized automatically.

Using iMailLight, you can structure your e-mail inbox more effectively. To train iMailLight, simply create a series of folders and fill these with category-specific e-mails. iMailLight studies the e-mails in these folders to identify recurring patterns. Incoming e-mails are compared with the data already acquired by iMailLight and are assigned a category or sorted into the relevant inbox folder if a match is identified.

To ensure that e-mails are sorted accurately into categories, it is important that you create a suitable inbox folder structure before installing iMailLight. The folders should deal with topics which can easily be differentiated from one another and each folder should contain a minimum of 20 typical e-mails.

This document describes how to install and use the iMailLight software.

2 SYSTEM REQUIREMENTS

The following software components are required to ensure that iMailLight operates effectively:

- Intel Pentium or compatible processor, 500 MHz or higher
- 128 MB main memory or more
- Microsoft Windows 98/ME/2000/XP
- Microsoft Outlook 2000/2002/XP
- Microsoft .NET Framework 1.1 or 2.0

If you have not yet installed .NET Framework on your computer, you can do so via the Windows update available at <http://windowsupdate.microsoft.com/>.

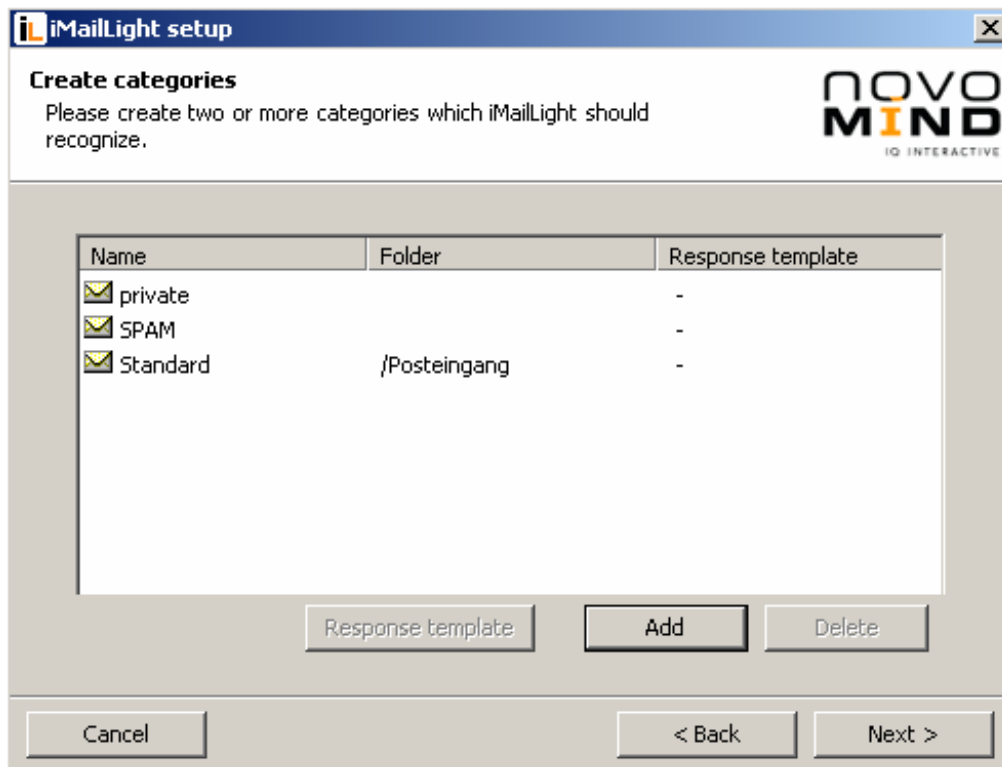
3 INSTALLING iMAILLIGHT

Please close Microsoft Outlook before starting the installation process. Do not start Outlook until the installation has been fully completed.

Click on the "Setup.exe" file to start the installation. An assistant will take you through the installation step by step. iMailLight can be used immediately after installation and does not require you to restart your computer.

4 STARTING IMAILLIGHT FOR THE FIRST TIME

When you start Outlook for the first time after installing iMailLight, a setup assistant will be displayed to help you configure your individual categories. Following the introductory screen, click on "Next" to move on to the category configuration.



To learn effectively, iMailLight needs to access e-mails. You should move all e-mails for a particular category into an Outlook folder created especially for this category. These pre-structured folders enable iMailLight to sort incoming e-mails into the relevant folders automatically.

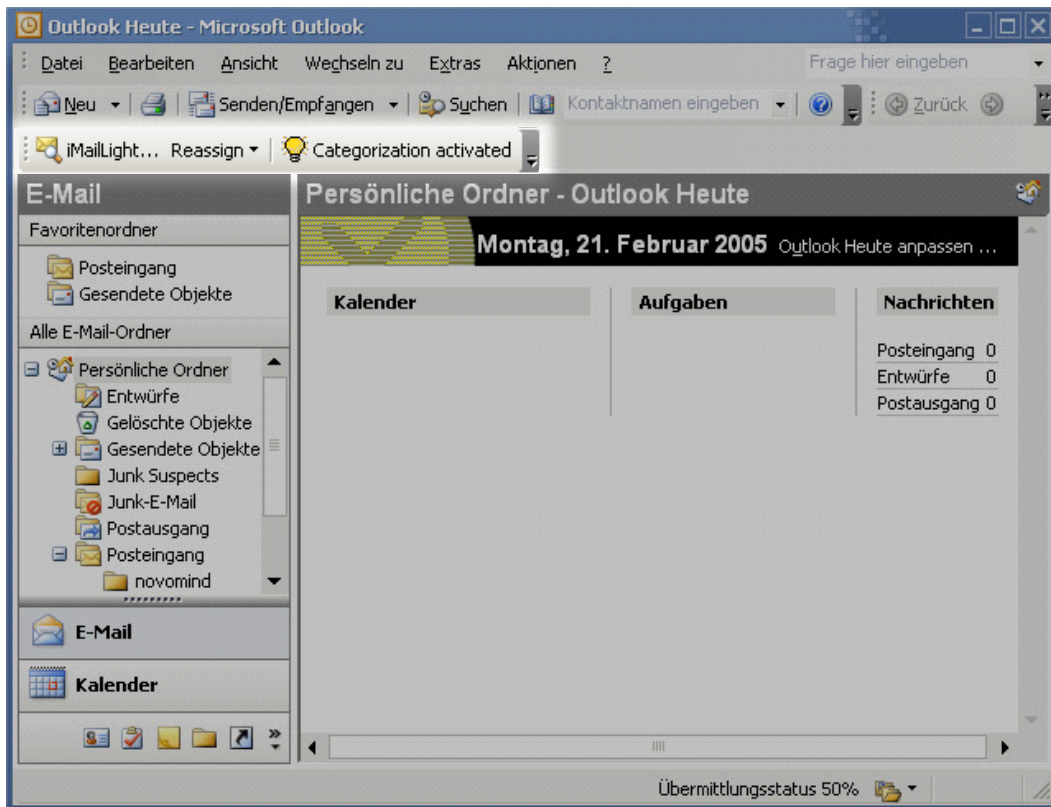
Create a category for each folder which iMailLight should be able to identify. Use the dialog box to enter a suitable name for the category (e.g. "Personal e-mails"). Now select the folder which contains e-mails specific to this category (e.g. a folder containing non-business related correspondence). To enable iMailLight to learn effectively, each folder must contain at least 20 e-mails.

The "Inbox" folder is automatically included as a separate category. It acts as a default category to ensure that even if incoming e-mails cannot be assigned a more specific category, they still remain in the e-mail inbox. This reduces the probability of any sorting errors occurring. If you prefer not to use the default "Inbox" category, simply delete it from the category list.

Once you have created your categories and confirmed the configuration by clicking on "Next", iMailLight initiates its learning process by reading and analyzing your e-mails. Once completing this process, iMailLight is ready to start work.

5 USING IMAILLIGHT

iMailLight installs an add-on Outlook toolbar to enable you to access all iMailLight settings.



5.1 "CATEGORIZATION" STATUS BUTTON

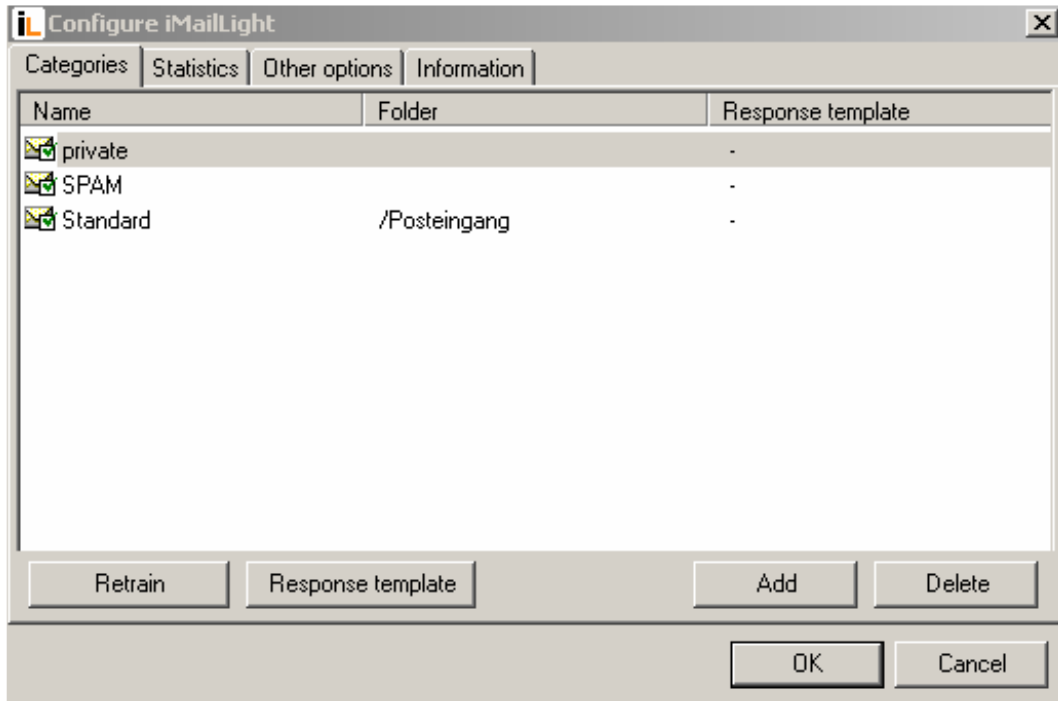
iMailLight automatically sorts new e-mails into the most suitable categories. To deactivate or reactivate this process, simply modify the current status of iMailLight using this toolbar button.

5.2 "REASSIGN"

If iMailLight channels an e-mail into the wrong folder, you should select the e-mail in question and use the "Reassign" menu to move it to the correct folder. iMailLight will initiate a new learning process to avoid making the same mistake in future.

5.3 CONFIGURATION DIALOG

The configuration dialog is accessed using the "iMailLight" toolbar button.



5.3.1 "CATEGORIES" TAB

This tab allows you to add or delete categories at any chosen time. A small symbol located next to the categories indicates whether or not iMailLight will require retraining once you have clicked on "OK". You can also initiate a retraining process manually by clicking on the "Retrain" button. The new learning process will start automatically after the configuration dialog has been closed.

5.3.2 "OTHER" TAB

You can fine-tune iMailLight functionality to boost the accuracy of the categorization process.

The list of non-relevant words can be used to exclude specific terms from the learning process. The default input box already contains a standard list of English and German-language terms for exclusion.

The option "Include e-mail subject" enables you to define whether or not iMailLight should analyze the e-mail text body only, or additionally take into account the contents of the e-mail subject line. We recommend that you activate this option.

The "Exclude HTML tags" option is used to define whether or not e-mails in HTML format should remain in the original format or be converted to text-only format. We recommend that you deactivate this option if you have set up a category for spam e-mails. Most junk mail contains HTML markups which make it easier to identify.

The "Exclude signature" option allows you to define whether or not the signature text included at the end of some e-mails should be taken into account during the learning process.

5.3.3 "STATISTICS" TAB

iMailLight provides recognition rate statistics to enable you to check how effectively it is operating according to category. The "E-mails for training" column displays the number of e-mails used to train iMailLight. The column marked "Correct" displays the number of e-mails which were correctly allocated to this category. Incorrectly-sorted e-mails which were re-categorized using the "Reassign" function are listed in the column marked "Incorrect".

5.3.4 "INFORMATION" TAB

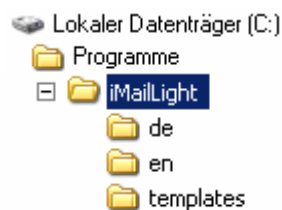
This tab provides iMailLight data, a contact address and information about the version currently in use.

6 ANSWERING E-MAILS USING SUGGESTED RESPONSES

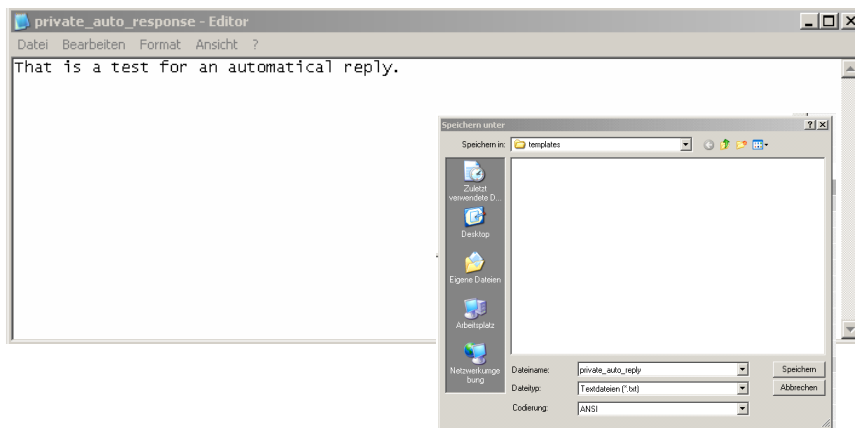
iMailLight enables you to easily allocate a suggested response to a specific e-mail category. As soon as a response has been allocated to a category, a draft will automatically be saved to the Outlook draft folder for each e-mail which has been classified as that particular category by iMailLight. The draft contains both the suggested response and the original e-mail text.

6.1 CREATING AND ALLOCATION OF RESPONSE TEMPLATES

A special "Templates"-folder in which the suggested responses are created is automatically generated and added to the iMailLight program folder.



To create a suggested response for a category, simply open Microsoft Editor or TextPad, type the relevant text (in plain text) and save the file to the directory "~/iMailLight /templates".



As soon as suggested responses have been added to the templates directory, the "response template" button in the iMailLight configuration can be used to allocate suggested responses to categories.

Now click on the button marked "response template", select the relevant suggested response and then click on the "Open" button. The allocated suggested response will now be displayed in the "Template" column in the iMailLight configuration.

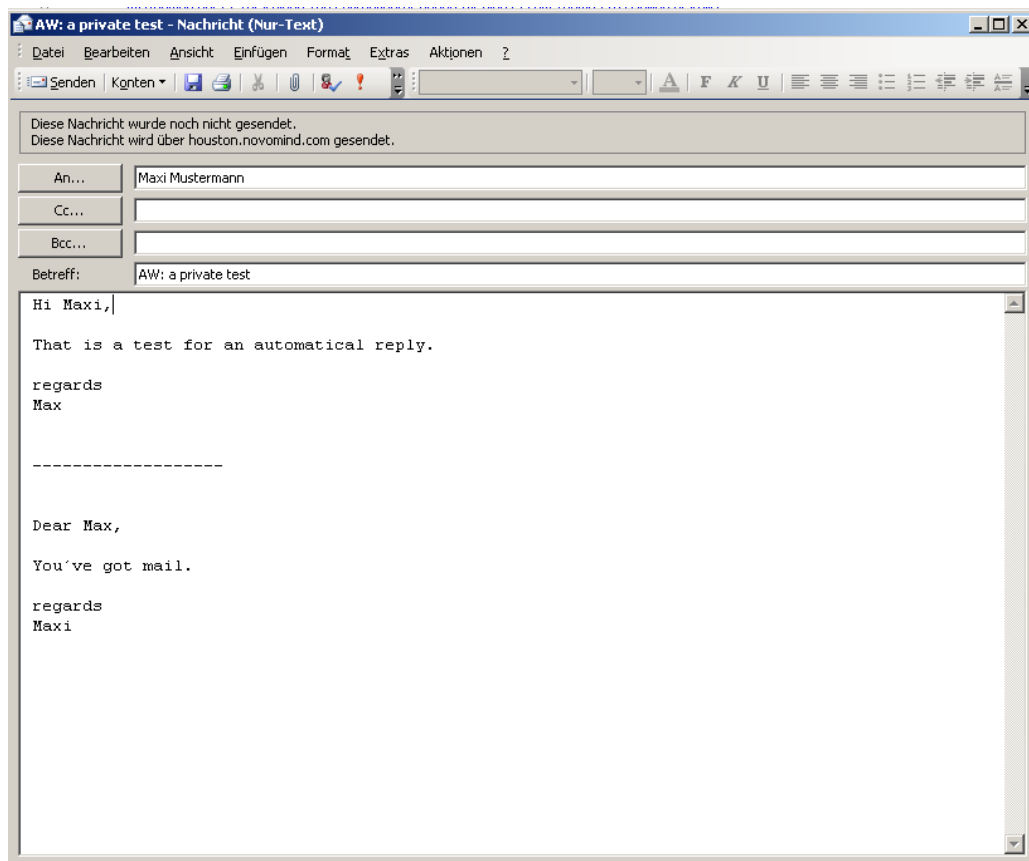
The response allocation will be valid until a new suggested response is allocated or when the original allocation is cancelled by clicking on the "response template" button and then selecting the option "Cancel" in the dialog box that is displayed.

PLEASE NOTE: Category/suggested response allocations are not cancelled if the text file is simply deleted from the templates folder. If no alternative allocation or non-allocation is defined in the iMailLight configuration, the previous allocation remains valid, regardless of whether or not the respective text file is still located in the templates folder. This also means that modifications to the text file can only be activated by re-allocating that particular response template to the category using the configuration.

6.2 GENERATING E-MAIL RESPONSES AUTOMATICALLY

If an incoming e-mail is categorized by iMailLight and a suggested response has been defined for that particular category, a suggested response is automatically generated and saved to the draft folder.

The example below shows a private e-mail which was categorized as "Private" and for which the following suggested response was automatically created.



To answer e-mails which have been categorized by iMailLight, therefore, simply open the drafts folder and select the relevant e-mail by double clicking on the relevant file. You can, of course, add any additional texts and attachments as required.

7 ERROR MESSAGES

Message:	Please select a folder which contains e-mails.
Occurrence:	While attempting to select a folder during the category creation process.
Description:	The folder which you have selected is not an e-mail folder. The "Calendar" or "Contacts" folders are two examples of folders which are not designed to contain e-mails.
Solution:	Select a folder which contains only e-mails.

Message:	A category already exists for the selected folder.
Occurrence:	While attempting to select a folder during the category creation process.
Description:	A category has already been assigned to the folder which you have selected.
Solution:	Select a folder which is not currently being monitored by iMailLight.

Message:	The selected folder contains less than 20 e-mails. This may lead to a lower recognition rate when categorizing e-mails automatically.
Occurrence:	While attempting to select a folder during the category creation process.
Description:	The folder which you have selected does not contain the minimum number of e-mails required to train iMailLight effectively (20 e-mails).
Solution:	To boost the recognition rate, select and move relevant e-mails to the folder in question until 20 e-mails are available. Now use this folder/category to (re)train iMailLight.

Message:	You must create at least two categories.
Occurrence:	While creating a category in the setup assistant.
Description:	You have created less than two categories.
Solution:	Create a minimum of two categories to enable you to work with iMailLight.

Message:	Please select at least one category.
Occurrence:	After clicking on "Suggested response".
Description:	You have not selected a category to which the suggested response can be allocated.

Solution:	Select a category and click on "response template" again.
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Message:	Training data could not be loaded. To carry out the training process, please restart Outlook now.
Occurrence:	While starting Microsoft Outlook.
Description:	The iMailLight training file could not be found or is corrupt. The training process must be repeated.
Solution:	Close and restart Outlook. iMailLight will display the setup assistant again.

Message:	You have moved or deleted a folder which is monitored by iMailLight. This will cause problems during the automatic categorization process. Please retrain iMailLight.
Occurrence:	While attempting to move/delete a folder which is currently being monitored by iMailLight.
Description:	A folder required by iMailLight has been deleted/moved. The training process must be repeated.
Solution:	Reopen the configuration dialog and define all the required categories again.

Message:	Category "xyz" corrupt. Please retrain iMailLight.
Occurrence:	During the categorization process for incoming e-mails.
Description:	The iMailLight classification file is corrupt.
Solution:	Reopen the configuration dialog and define all the required categories again.

Message:	An error has occurred in iMailLight. Please close and then restart Outlook.
Occurrence:	Unknown.
Description:	An unknown error has occurred.
Solution:	Close and restart Outlook. If the error recurs, please contact the iMailLight Support Team for further assistance.