

**Isidore Email Logger** 

**Installation Instructions** 

Version 1.0

# Installation of the Isidore Email Logger

Following are the instruction for the installation of the Isidore Email Logger. These instructions assume that the personal installing the Email Logger has the 3 files (although only 2 are mentioned below as the form contains 2 files without need to add each individually)

The 3 Email Logger files must be saved to folder which is accessible to the person following these instructions (loading the Email Logger onto their Outlook/machine).

The Email Logger should be able to access all Inboxes and sub-folders of the user who is installing the Email Logger.

The Email Logger Excel file is not mentioned in these instructions, but should be saved to a location accessible to the person/machine installing the Email Logger for selection when the Email Logger is run (see Email Logger User Manual). It is recommended to keep a master copy of the Email Logger Excel workbook so new reports can be copied from it and saved as separate files, without losing the original workbook format for reference.

## 1. Open MS Outlook

This should be the version/machine/PC which the Email Logger will be run on (by the user currently logged in)

## 2. Open the Developer Tab

The developer tab should appear at the top of Outlook (image 1.)

File	Home	Send / Receive	Folder	View	Developer	Objective	$\ensuremath{\mathbb{Q}}$ Tell me what you want to do
			- /	_			

#### Image 1.

## 3. Display the Developer Tab (optional)

If the developer tab is not visible, display the developer tab

- 3.1 Click on "File" in the top menu (image 1.)
- 3.2 Click on "Options" in the file menu (image 2.



Image 2.

3.3 Select "Customize Ribbon" and make sure the check box is checked next to "Developer" (image 3.)



## Image 3.

## 3.4 Click Ok

The Developer should now display at the top of Outlook. If not close Outlook and open again.

## 4. Open Visual Basic

Click on the Developer tab, then click on the "Visual Basic" button (image 4.)



## Image 4.

This will open the visual basic window (image 5.)



Image 5.

Import the Email Logger Files
 Right-click the Forms folder and select Import from the Menu (image 6.)





6. Select Email Logger Form

Select the Email Logger Form file (frmEmailLogger.frm) and click "OK" image 7.

der				
*	Name	Date modified	Туре	1
*	📋 frmEmailLogger.frm	03/09/2021 11:28 AM	FRM File	
*	mdlEmailLogger.bas	03/09/2021 11:28 AM	BAS File	
*				
*				

Image 7.

## 7. Select Email Logger Module

Repeat steps 5,6 and 7 for the Email Logger bas file (mdlEmailLogger.bas) as per image 7. And check that the files are now in the Visual Basic window image 8.



## Image 8.

## 8. Customise Outlook Ribbon

Go back to Outlook and click on the Developer tab, then right-click on the blank area to the right of the last icon and select "Customize the Ribbon..." option (image 9.

Fold	ler View	Developer	${\mathbb Q}$ Tell me what you want to do
2			
Disabled Choose Design		n	Customize Quick Access Toolbar
ltems	Form a Form		Show Quick Access Toolbar Below the Ribbon
ins	Custom Forms		Customize the <u>R</u> ibbon
Searc	h Current Mailbo	ox (Ctrl 🔎 🛛 🔾	Collapse the Ribbo <u>n</u>

Image 9.

## 9. Add Ribbon Group

In the Menu which pops-up click once on the Developer text in the right-hand-side menu then click on the "Add Group" button. Image 10.

General       Mail         Calendar       Choose commands from: ③       Customize the Ribbon.         People       Popular Commands       Main Tabs         Tasks       Account Settings       Main Tabs         Address Book       Automatic Replies       B → Home (Calendar Table View)         Language       Automatic Replies       B → Home (Calendar Table View)         Advanced       Mainage Rules & Alerts       B → Home (Calendar)         Quick Access Toolbar       New Appointment       B → Home (Contacts)         Add-ins       New Task       Options       B → Home (Gorupal)         Save All       Save All Folders       B → Home (Gorupal)       B → Home (Gorupal)         Main Tabs       Save All Folders       B → Home (Contacts)       B → Home (Contacts)         Add-ins       Print       Save All Folders       B → Home (Gorupal)       B → Home (Gorupal)         Main Tabs       Save All Folders       B → Home (Calendar)       B → Home (Calendar)       Customize the Ribbon         Quick Access Toolbar       New Task       Add ->>       Custom contact       B → Home (Calendar)       Custom contact         Madi-ins       New Contact       New Contact       Main Tabs       Custom contact       Custom contact       Custom contact	Outlook Options		?	×
Mail       Choose commands from:①       Customize the Rigbon:①         Calendar       Popular Commands       ✓         People       ✓       Main Tabs       ✓         Tasks       Account Settings       ✓       ✓         Search       Automatic Replies       E Mome (Calendar Table View)       ●       ✓         Language       Manage Rules & Alerts       ●       ✓       Home (Calendar)         Advanced       ●       New Appointment       ●       ✓       Home (Calendar)         Quick Access Toolbar       New Task       ●       Home (Iournals)       ●       ✓       Home (Iournals)         Add-ins       ●       New Task       Options       ●       ✓       Home (Custom)       ●       ✓         Yiew       Save All Attachments       Save All Attachments       Add >>       <	General	Customize the Ribbon		
Calendar       Customize the Rigbon: ③         People          Tasks       Account Settings         Address Book       Main Tabs         Language       Automatic Replies         Advanced       Close All Items         Quick Access Toolbar       New Contact         Quick Access Toolbar       New Task         Add-ins       Print         Trust Center       Save All Attachments         Send/Receive All Folders       Undo         Work Offline       Send/Receive All Folders         View          More Table       New Group         Remove       © Objective         New Task       New Offline	Mail			
Popular Commands       ✓         People         Tasks         Search         Language         Advanced         Customize Ribbon         Quick Access Toolbar         Add-ins         Trust Center         Main Tabs         Mai	Calendar	Choose commands from: ① Customize the Ribbon: ①		1
People         Tasks         Search         Language         Advanced         Customize Ribbon         Quick Access Toolbar         Add-ins         Trust Center         Seave As         Seave As         Send/Receive All Folders         Undo         Work Offline		Popular Commands   Main Tabs	*	]
Customizations: Reset	People Tasks Search Language Advanced Customize Ribbon Quick Access Toolbar Add-ins Trust Center	Account Settings   Address Book   Automatic Replies   Close All Items   Manage Rules & Alerts   Meeting   New Appointment   New Contact   New Contact   New Task   Options   Print   Save All Attachments   Save As   Send/Receive All Folders   Undo   Work Offline     Add >>     Add >>     Main Tabs   Home (Calendar Table View)   Home (Calendar)   Home (Contacts)   Home (Insks)   Home (Insks)	) Rena <u>m</u> e ) <b>v</b> ()	

Image 10.

## **10.** Add Email Logger Procedure To Button

Select "Macros" from the "Choose Commands From" drop-down list at the top of the lefthand side list, select the "OpenEmailLogger" procedure in the left-hand-side list, then click the "Add>>" button in the middle of the screen. This should add the OpenEmailLogger to the New Report Group in the Right-hand-side list. (image 11.)

Customize the Ribbon.					
Choose commands from:		Customize the Ribbon: 🛈			
Macros	*	Main Tabs 🔻			
<ul> <li>CreditCardReports.CreditCard.</li> <li>CreditCardReports.Process.Ch.</li> <li>CreditCardReports.MakeXML</li> <li>CreditCardReports.Process.Ch.</li> <li>CreditCardReports.Process.Ch.</li> <li>CreditCardReports.Process.Ch.</li> <li>CreditCardReports.Process.Ch.</li> <li>CreditCardReports.SendCAPS.</li> </ul>	▲ Add >> << <u>R</u> emove Macro: OpenEmailLogge	Main Tabs <ul> <li>✓ Home (Calendar Table View)</li> <li>✓ Home (Calendar)</li> <li>✓ Home (Calendar)</li> <li>✓ Home (Contacts)</li> <li>✓ Home (Contacts)</li> <li>✓ Home (Isks)</li> <li>✓ Home (Iournals)</li> <li>✓ Home (Journals)</li> <li>✓ Home (Group)</li> <li>✓ Send / Receive</li> <li>✓ Folder</li> <li>✓ View</li> <li>✓ Developer</li> <li>① Code</li> <li>○ Add-ins</li> <li>① Custom Forms PDF Extractor (Custom)             </li> </ul> <li>Mew Group (Custom)</li> <li>✓ Add-ins</li> <li>⑦ Objective</li> <li>✓</li>			
		OK Cancel			

## Image 11.

#### **11.** Rename Button and Finalise

Select the OpenEmailLogger item under the New Group (custom) row in the right-hand-side list, then click the "Rename..." button under the right-hand-side menu. This will open the rename dialogue. Change the name to "Email Logger" (spaces and no starting text if there is any) and select a nicer image (the page with lightning). Then click the "OK" in the Rename Dialogue then "OK" in the main Customize Ribbon menu. This will add the new button to the Developer tab. (image 12.)



## Image 12.

## **Installation Complete**

This completes the installation of the Email Logger, which can be run at any time by clicking on the new Open Email Logger button!

The same process can be repeated on any other person's PC/machine. This can also be repeated if the button drops-off the ribbon (after some updates and restarts this may occur).

For more help, please contact Isidore or go to the Isidore website www.isidore.com