

iEmail v3 User Guide & Installation Manual

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iEmail is a utility that integrates Microsoft Outlook™ with the iMIS membership database. It enables staff to search the iMIS database for email addresses, log outgoing and incoming emails as iMIS activities, and synchronise Tasks and Appointments between iMIS and Outlook.

Current Version	3.2.7 (July 2023)
Outlook Support	Outlook 2016 or higher (classic/COM)
Windows Support	Windows 10 or higher
iMIS Support	iMIS 15.2, 20.1, 20.2 (2017)
.NET Framework	v4.6.2 or higher
Support	support.imis.com

1. iEmail Overview

iEmail is a utility that integrates Outlook™ with your iMIS database. Key capabilities include:

- Search the iMIS database for email addresses and add them to the To, Cc, or Bcc fields in Outlook.
- Insert emails directly into iMIS as activities, along with text and attachments. You may insert at send time or after an email has been sent or received.
- Import Tasks and Appointments from iMIS into Outlook's Tasks and Calendar.
- Allow the System Administrator to limit user access and set maximum recipient counts (iEmail is not a mass-emailing tool).

Note: This guide covers iEmail v3. Support for iEmail v2 ended July 1, 2022. If you need to upgrade, email support.imis.com.

Important: Microsoft's New Outlook does NOT support COM Add-ins. iEmail is a COM Add-in and will not run under New Outlook. The cloud-based replacement is **iEmail Cloud** (docs.csiinc.com/iemail-cloud/).

2. System Requirements

iEmail Web Services (Server)

Component	Requirement
SQL Server	2008R2 / 2012 / 2014 (32-bit and 64-bit)
RAM	1,024 MB minimum
Disk space	100 MB free
.NET Framework	v4.6.2

iEmail Client (Workstation)

Component	Requirement
OS	Windows 10 or higher
Outlook	Microsoft Outlook 2016 or higher (not O365 web interface)
iMIS	15.2, 20.1, 20.2 (2017)
RAM	1,024 MB minimum
Disk space	100 MB free
.NET Framework	v4.6.2

Note: Installation assumes a default environment (Default Website, Port 80 open, no unusual firewall restrictions). Non-standard configurations are outside the standard support agreement and may be billable.

3. Architecture — Three Components

iEmail v3 is composed of three separate programs that must all be installed and kept at matching major/minor versions:

#	Component	Where installed
1	iEmail IQA Web Service	On the iMIS casual-view web server (same folder as iMIS)
2	iEmail Web Services	On the application/web server with IIS and SQL access
3	iEmail Client (COM Add-in)	On each workstation running Outlook

Note: Licensing for iEmail v3 is per-user. You must add the role **CSI-iEmail** in iMIS and assign it to each licensed user.

4. Installing iEmail for the First Time

Step 1: Configure Your Application/Web Server

Install IIS 6 Management Compatibility components. The required sub-feature is **IIS 6 Metabase Compatibility**. Procedure varies by OS:

Windows Server 2012 or higher — Server Manager:

1. Click Start > Windows Administrative Tools > Server Manager.
2. From the dashboard select **Add Roles and Features**.
3. Ensure Role-Based or Feature-based installation is selected. Click Next.
4. Expand **Web Server (IIS) > Management Tools > IIS Management Compatibility**.
5. Select **IIS 6 Metabase Compatibility**, **IIS 6 Management Console**, and **IIS 6 WMI Compatibility**.
6. Click Next on the Features screen without changes.
7. Click **Install**, then **Close**.

Step 2: Install iEmail (IQA) Web Services

The IQA web service must reside on the same server as the iMIS casual website.

1. Unzip the iEmail installation files received from ASI/CSI.
2. Browse to the folder **Web Services IQA**.
3. Run **iEmail Webservices Deployment IQA Setup** and click through the wizard.

4. Run the installed **iEmail Web Services Deployment IQA** program.
5. Enter the physical path to the iMIS casual website (include \NET at the end of the path).
6. Enter the iMIS Staff website URL (exclude /CS at the end). Click **Browse URL** to verify.
7. Click **Install**. You should receive 'Web service was successfully installed.' Allow iMIS to restart.

Important: iMIS will restart at the completion of the IQA installation. Ensure no users are working in iMIS during this step.

Step 3: Install the iEmail v3 Web Services Deployment Program

From the **Web Services** folder, double-click **iEmail Webservices Deployment Setup** and complete the wizard. Then launch the deployment program from Start > CSI Programs.

In the deployment tool, configure the following fields:

Website	Default Website (highly recommended)
Virtual Directory	iEmailWebServices (recommended default)
Application Pool	iEmail App Pool (recommended default)
Physical Location	C:\inetpub\iEmailWebServices (recommended default)
iMIS Web Server URL	Your iMIS staff site URL — must start with HTTPS:// — exclude /CS
Database Server Name	SQL Server hosting iMIS
Database User Name	SQL Administrator username (not your iMIS username)
Database Password	SQL Administrator password
Database Name	The iMIS database name

Click **Validate Database** — the button turns green when successful. Then click **Update** to create the web service. Allow 1–2 minutes to complete.

Note: You may get a timeout error on the iMIS Web Server URL. Wait 1 minute and retry. If it fails, verify the URL opens in a browser (using HTTPS).

Step 4: Install SSL Certificate for iEmail Web Service (Optional)

Recommended if you will use iEmail outside your firewall or with a hosted iMIS database. Create a self-signed certificate in IIS and bind it to port 443 (HTTPS).

Step 5: Install the iEmail Client Outlook Add-in

Close Outlook completely before proceeding.

1. Right-click **iEmail Client Outlook Add-in 3.X.XX.exe** and select **Run as Administrator**.
2. If prompted to uninstall a previous version, select **Yes**.

3. When asked about installing for all users or current user, select **Yes** for all users (typical).
4. Accept the licence agreement and follow the installer prompts.
5. Launch Outlook to confirm the iEmail toolbar is present.

Note: Silent install command: "iEmail Client Outlook Add-in 3.X.X.X.exe" /S

Step 6: Create the License Role in iMIS

In the iMIS Staff site (as System Admin), go to **Security > Roles** and click **Add a role**. Create a role with the code **CSI-iEmail** and save.

Step 7: Assign the CSI-iEmail Role to Licensed Users

In the iMIS Staff site go to **Security > Users**. For each licensed user, open the user record, click **Add role** under User Information, select **CSI-iEmail**, and click OK.

Step 8: Add/Edit Email Activity Type in iMIS Desktop

Navigate to **Customers > Set up Module > Activity Types**. Click **New** to add or select an existing type to edit. Set the Activity Type to EMAIL and save.

Step 9: Add/Edit Email Activity Type in iMIS Staff Site

Navigate to **Settings > Contacts > Activity Types**. Click **Add new activity type** (or click an existing type to edit). Configure the EMAIL type and click **Save & Exit**.

5. Running iEmail for the First Time

1. Launch Outlook and start a new email.
2. Click the **iMIS** icon in the Outlook toolbar.
3. On the iEmail Login Screen enter your iMIS Logon, Password, and the iEmail Web Service URL (NOT the iMIS Server URL). The URL must start with HTTPS://.
4. Click **Logon**. Your credentials are saved for future sessions.

Note: If Outlook disables the iEmail add-in, go to File > Manage COM Add-Ins, find **iEmail Outlook COM Add-in**, and select **Enable this add-in**.

About the License Key

When you first log in, iEmail calls a CSI API to validate your license. If valid, it self-licenses. Without a license key, iEmail can only connect to an iMIS Demo database. New-computer installations do not require re-entering the license key.

6. Updating iEmail

Each upgrade requires updates to **both** the client COM Add-in and the server web services (and the IQA web services if installed). The first two version numbers (major.minor) must match between client and server.

Update order:

1. **Close Outlook** and confirm it is not running in Task Manager.
2. Run **iEmail Client Setup.exe** on the workstation and follow prompts.
3. On the server, run the **iEmail Web Services Deployment installer** and complete the wizard.
4. Launch the deployment tool from Start, click **Validate Database** (turns green), then click **Update**.
5. If using IQA: on the iMIS casual website server run the **iEmail Web Services Deployment IQA Setup** and click **Install** to update.

7. Using iEmail

7.1 Searching for Addresses

From a new email in Outlook, click the **iMIS** icon to open the iEmail Address Book. iEmail offers five search methods:

Tab	Description
Search	Search by iMIS fields (Name, Company, ID, user-defined indexes, etc.)
Committee	Browse and select from iMIS committees; filter by type, term, or sort order
Ad Hoc	Run any Ad Hoc query stored in your iMIS database
Events	Drill down by Event → Function → Registrants
Views	Search using User Defined or System views that include an Email field
Query Architect (IQA)	Browse IQA folder structure and run queries; requires IQA web service

After selecting recipients, click **To**, **Cc**, or **Bcc** to insert addresses, then click **Save** (or **OK**). Use Ctrl+A to select all, or hold Ctrl to select individual records. Right-click the result grid for shortcut actions.

Note: If Ad Hoc search changes in iMIS are not reflected in iEmail, go to Options > Web System Setup and click **Recycle Application**.

7.2 Creating an Email Activity in iMIS

Option 1 — Send and Insert simultaneously:

Use the **Send/Insert Activity** button (instead of the standard Send button). iEmail sends the email and opens the Insert Activity window. Click **Save**.

Option 2 — Insert after sending or receiving:

1. Select the email in Outlook (inbox, sent, or any folder).

2. Click the **Insert Activity** icon on the iEmail toolbar.
3. Choose which address box iEmail should search (From, To, or both).
4. Optionally enable **Save Mail Message as EML file attachment**.
5. Click **Save**, then **Yes** to confirm. iEmail creates an activity for each matched recipient.

Note: When replying or forwarding, pop the email out of the Reading Pane first (click the pop-out icon), then use Send/Insert Activity — otherwise reply text will not appear.

7.3 Activity Field Mappings

In Options > Insert Activity Setup > Setup Activity Types, map email fields to iMIS activity fields:

Token	Description
[SentOn]	Date the email was sent
[Subject]	Email subject line
[Body]	Full email body text
[Username]	iMIS logged-in username
[Recipients]	Comma-separated list of all recipient addresses
[From]	Sender address
[To]	To addresses
[Cc]	Cc addresses
[Bcc]	Bcc addresses
[Today]	Current date (e.g. 4/12/2019 12:00 AM)
[Now]	Current date and time (e.g. 4/12/2019 9:30 AM)

7.4 Creating an Email Interaction in iMIS

Click **Create Interaction** in the Outlook toolbar. In the Create Interaction window:

1. Review matched recipients on the **Recipients** tab. Unmatched addresses appear in 'E-mail Address Not Found' — use **Find** to locate them.
2. Change the filter (To only / From only / From+To) as needed.
3. View the email on the **Message** tab; manage attachments with the **Attachment** button.
4. Optionally check **Save Mail Message as EML file attachment**.
5. Click **Save** then **OK**.

7.5 Syncing Tasks and Appointments

Import Tasks from iMIS to Outlook:

Click **Sync Tasks** in Outlook. Select a task and click the Import icon. Click the Synchronize button to push completed Outlook tasks back to iMIS.

Import Appointments from iMIS to Outlook:

Click **Import Appointments** in Outlook. Double-click an appointment to see details; click **Import** to add it to your Outlook Calendar.

Insert Appointment Activity into iMIS from Outlook:

For a new meeting, click **New Meeting** in Outlook, optionally add attendees via iEmail, then click **Insert Activity** before sending. For an existing appointment, open it and click **Insert Activity**.

8. System Setup

Access via Outlook > New Email > iMIS icon > **Options > System Setup**. Requires iMIS Sys Mgmt. authorization level 8 — System Setup. Settings apply to all iEmail users.

Setting Area	Description
Search Options	Enable/disable Address Book tabs (Search, Ad Hoc, Committee, Events, Views, IQA). Access Keywords override per user. Enable Primary Chapter Search to use Name.Chapter instead of Subscriptions.
Search Filtering	Define which Committees (or Committee Groups) and Views are available. Move items to Hidden to remove them; move Views to Available to expose them. Remove Views from iEmail before removing from SQL.
IQA Options	Set the Root Path for the Query Architect tab (e.g. \$/ContactManagement/...). Narrower paths reduce the folder tree shown to users.
Recipient Options	Set the maximum number of recipients in To, Cc, and Bcc. CSI recommends no more than 200 total.
Activity Insert Options	Enable/disable Insert Activity, attachment saving, and Product Code lookup. Use Activity Type Setup to map email fields to iMIS activity fields.
View Profiles Options	Set the Profile URL for linking to iMIS Staff site member profiles.

Custom Access Keywords

Keyword	Grants access to
IEM_ADMIN	All tabs
IEM_SEARCH	Search tab
IEM_ADHOC	Ad Hoc tab
IEM_COMMI	Committee tab
IEM_EVENT	Events tab

IEM_VIEWS	Views tab
IEM_IQA	Query Architect tab
IEM_INSACT	Insert Activity function

9. Known Issues

- After inserting an address, the draft email is saved even if cancelled. Create an Outlook rule to delete blank-body or blank-subject drafts automatically.
- Creating and then cancelling an Appointment may leave a blank meeting on your Calendar.
- When using Send/Insert Activity, some versions place a copy of the email in Deleted Items (the activity is still created and the email goes to Sent Items normally).

10. Troubleshooting

Issue: Email attachments don't appear in Insert Activity, or exceeds file size limit.

Resolution: Contact your System Admin to verify Activity Attachments is enabled in iMIS Desktop (File > System Setup) and the Max file size is adequate.

Issue: Error: 'Maximum request length exceeded' on Insert Activity.

Resolution: Add `<httpRuntime maxRequestLength="20240" />` immediately after `<system.web>` in the iEmail Web.Config file.

Issue: CSI Toolbar appears multiple times in Outlook.

Resolution: If Microsoft Word is your default mail editor, open Word > Tools > Templates and Add-Ins > Organizer > Toolbars tab. Delete any CSI Toolbar entries, then restart Outlook.

Issue: 'There was no endpoint listening...' error on login.

Resolution: Verify the iEmail Web Service URL in Options > Connect to Web Service. In IIS, check that the Application Pool is set to Integrated mode with .NET 4.0 framework.

Issue: iEmail COM Add-in not visible after installation.

Resolution: Close Outlook. In Registry Editor, delete keys `HKCU\Software\Microsoft\Office\Outlook\Addins\CSI.iEmail` and `HKLM\SOFTWARE\Microsoft\Office\Outlook\Addins\CSI.iEmail`. Re-open Outlook and go to File > Options > Add-Ins to verify or re-add the add-in.

Issue: Cannot connect after upgrade to iMIS 2017.

Resolution: In the iEmail Web Services Deployment tool, update the iMIS Web Server URL to use HTTPS. Also check for IIS Rewrite rules on the Default Web Site that may be inherited by iEmailWebServices.

Issue: Wrong bitness installed (redemption.dll error).

Resolution: Uninstall iEmail and install the correct version for your Outlook bitness. Check Outlook bitness at File > Office Account > About Outlook.

Web Service Verification Checklist

Use this checklist to systematically verify your iEmail web service installation:

1. Download the latest iEmail version from the ASI Product Download site.
2. Install and run the iEmail Web Services Deployment Tool on the app/web server.
3. Verify the web service from the server: browse to <http://localhost/iEmailWebServices/Public.asmx> — you should see a web service page.
4. Identify the server name (right-click My Computer > Properties).
5. Verify from a workstation: browse to <http://ServerName/iEmailWebServices/Public.asmx>.
6. Verify the iMIS Membership Web Service: browse to <https://imis.yourorg.org/iMIS/AsiCommon/Services/Membership/MembershipWebservice.asmx>.
7. Log into iEmail: click the iMIS icon, enter iMIS credentials and the web service URL (omit /Public.asmx from the end).
8. If using IQA, verify: <http://localhost/DEMOIMIS/iEmail/QueryDetails.asmx>.

11. Release Notes

Version	Date	Changes
3.2.7	Jul 2023	Add-In Express loader files digital signature; Outlook Redemption v6.4.0
3.2.5	Jan 2023	Outlook Redemption v6.3.0
3.2.4	Jun 2022	Fix duplication of email addresses with multiple entries in the Email field
3.2.3	May 2022	Remove per-device user lock; Add-in Express 10.1; Redemption 6.1; EMS on-prem support
3.1.30	May 2022	Installer fix for Outlook 2013 64-bit
3.1.29	Sep 2021	Outlook Redemption v6.0
3.1.27	May 2021	Reduce license expiration from 20 to 10 minutes
3.1.25	Apr 2021	Outlook Redemption v5.27
3.1.22	Feb 2021	Redemption v5.26; 500-error handling; Add-In Express v9.5; simplified setup/zip
3.1.16	Jan 2021	Allow DELETE verb; disable WebDAV in web config
3.1.11	Jul 2020	Fix authentication issue with set-cookie on login
3.1.10	Jul 2020	Fix login issues from deprecated preferences
3.1.9	Jun 2020	Fix auth token expiration validation and renewal
3.1.0	Aug 2019	Multi-factor authentication support
3.0.1	Jan 2019	New major release; Interactions feature added

2.5.39	Jun 2018	Location field support in Insert Appointment Activity
2.5.37	Mar 2018	New View Profile feature
2.5.33	Jan 2018	TLS 1.2 support; library updates
2.5.31	Jan 2018	Find/Search text on Committee tab; new system options for Committee/Task Data search
2.5.14	Aug 2016	Alternate authentication via membership web services; IQA fixes for iMIS 20.2.x
2.5.10	Dec 2015	Fix Outlook 2016 64-bit detection in setup launcher