

# Email Signature Manager Agent 2.3 for Mac

User Guide Revision 2.

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## Introduction

The Email Signature Manager Agent for Mac is a native macOS agent to update Outlook signatures integrating with Symprex Email Signature Manager. System requirements are MacOS version 10.14 Mojave or later and Outlook using Legacy UI (AppleScript is not supported with New UI).

## Installation

The package installer (PKG) installs the Email Signature Manager Agent for Mac.

The agent requires a configuration file and will use the first it finds in the following order:

1. /Library/Symprex/Email Signature Manager Agent/Symprex Email Signature Manager Agent.plist
2. /Library/Symprex/Email Signature Manager Agent/Symprex Email Signature Manager Agent.txt
3. ~/Library/Application Support/Symprex/Email Signature Manager Agent/Symprex Email Signature Manager Agent.txt

If “Symprex Email Signature Manager Agent.txt” exists in the same directory as the installer, the installer will copy the configuration file to the user Library folder “~/Library/Application Support/Symprex/Email Signature Manager Agent”.

The agent is started automatically when the installation completes.

The configuration file includes the following settings:

```
UpdateFrequency=1
AllowConfigureDefaultSignatures=1
ShowConfigurationMenu=1
ShowViewLogMenu=1
ShowExitMenu=1
SignatureServerAddress=
SignatureServerPort=5757
SuppressErrorMessage=0
UserEmailAddress=
```

The settings have the following meanings:

`UpdateFrequency` specifies how frequently to update signatures. Default is 1 for 1 hour.

`AllowConfigureDefaultSignatures` specifies if the agent functionality is enabled to make signatures default in Outlook settings. Default is 1 for enabled.

`ShowConfigurationMenu` specifies if the Configure menu is available. Default is 1 for enabled.

`ShowViewLogMenu` specifies if the View Log menu is available. Default is 1 for enabled.

`ShowExitMenu` specifies if the Exit menu is available. Default is 1 for enabled.

`SignatureServerAddress` specifies the server name or IP address of the server that is running Symprex Email Signature Manager.

`SignatureServerPort` specifies the TCP port the Email Signature Manager Client Access Service is listening on. Default is 5757.

`SuppressErrorMessage`s specifies if connection errors should be suppressed. Default is 0.

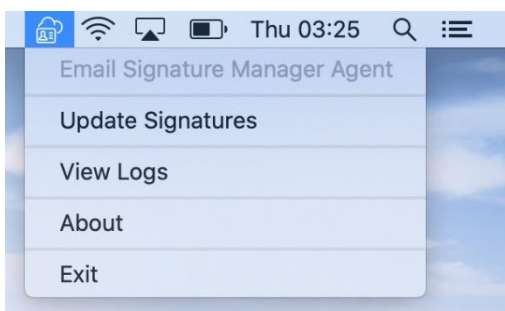
`UserEmailAddress` specifies a fixed email address to use to get user signatures from the server. Default is none meaning the agent will use the email address from the default Outlook profile.

The server address setting must be configured before installation:

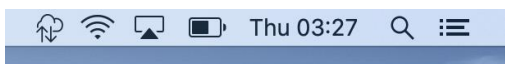
Before installing the `SignatureServerAddress` value must be set to the name or IP address of the server where Symprex Email Signature Manager is running, for example `esm.domain.com` or `10.10.1.50`.

## Using

The Email Signature Manager Agent appears as an icon in the macOS menu extras:



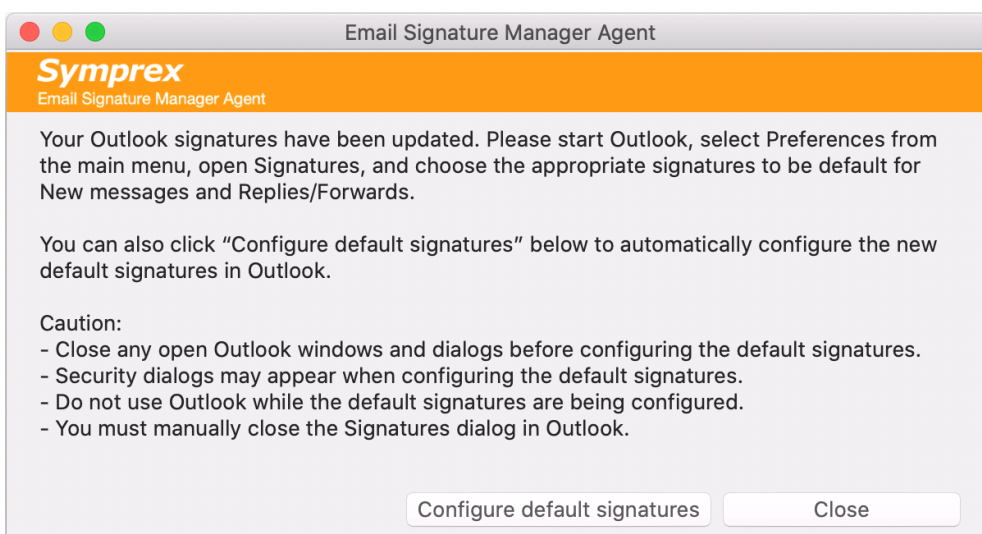
The agent icon changes to show when the agent is communicating with the server:



The agent updates Outlook signatures in the background by default every 1 hour.

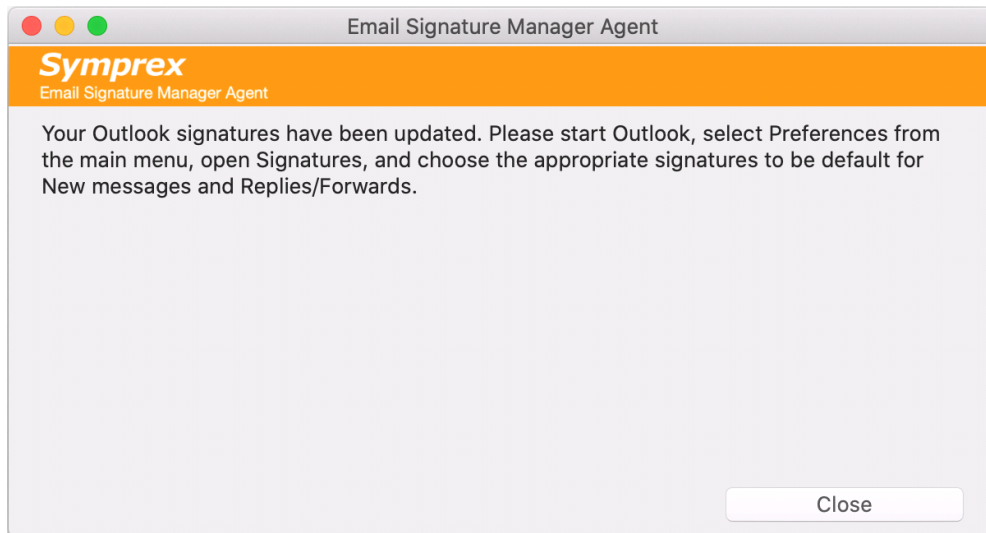
Clicking the agent icon shows a dropdown menu, which also allows the user to manually force an update of Outlook signatures.

When Outlook signatures have changed or been manually updated, the following dialog shows on the screen:



Technical limitations mean the agent cannot change which signatures are default in Outlook for New Messages and Reply/Forwards. The user can click the “Configure default signature” button to update the defaults. On macOS, Outlook default signatures can only be configured using UI automation. The Outlook Preferences dialog will open, and the default signatures selected.

If the feature to configure default signatures is disabled in the configuration file, the “Configure default signature” button is hidden, and the dialog shows as below:



In this case the user must manually choose default signatures in Outlook following the instructions.

## Limitations

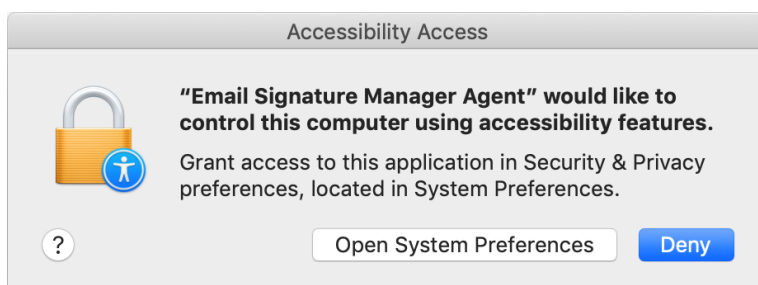
The agent cannot determine which signatures are chosen in Outlook as default for New Messages and Reply/Forwards. This is a technical limitation on Mac. During automatic background updating the user will therefore not be notified if the currently chosen defaults in Outlook are not correctly selected. However, using the manual signature update method, the agent offers the option to set default signatures in Outlook (unless this feature is disabled in the configuration file).

## Permissions

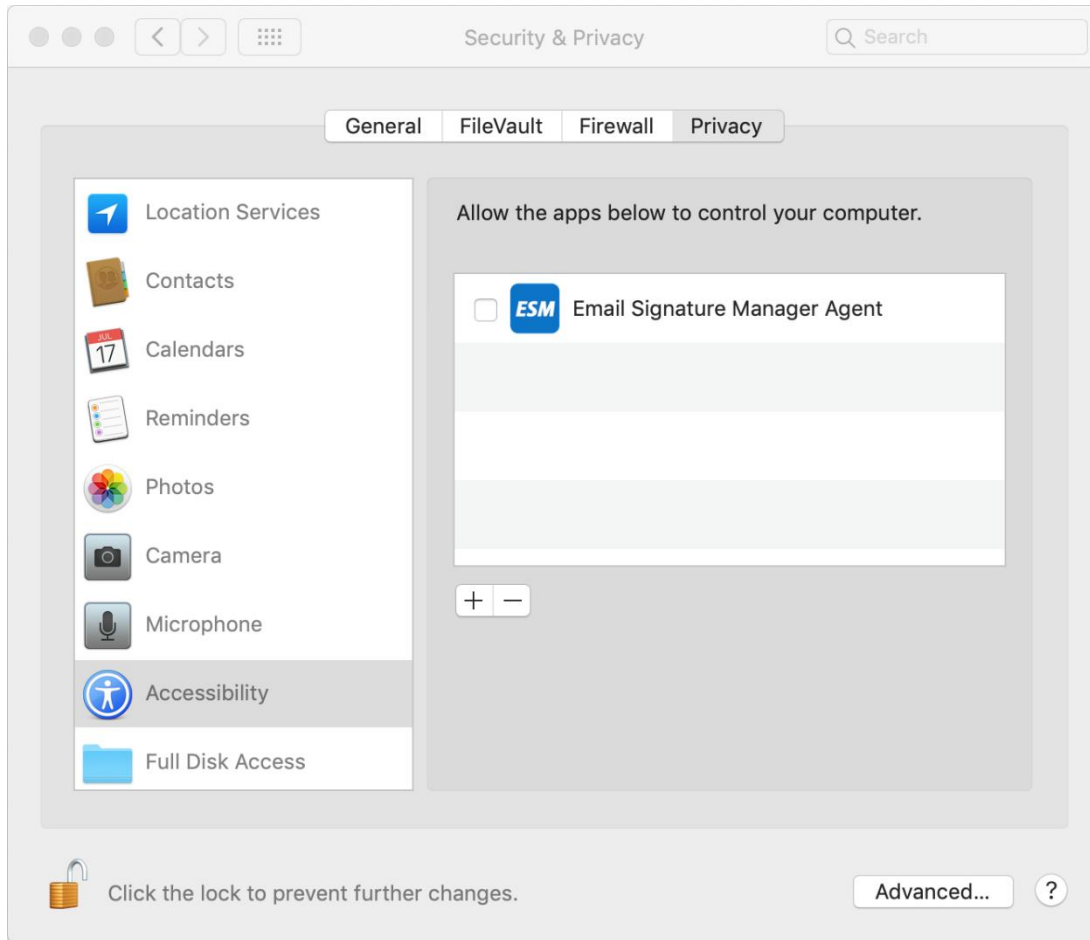
The permissions required to use this agent on macOS Mojave and later are described below.

## Accessibility

If this access is not granted, the following message will appear when using the agent:



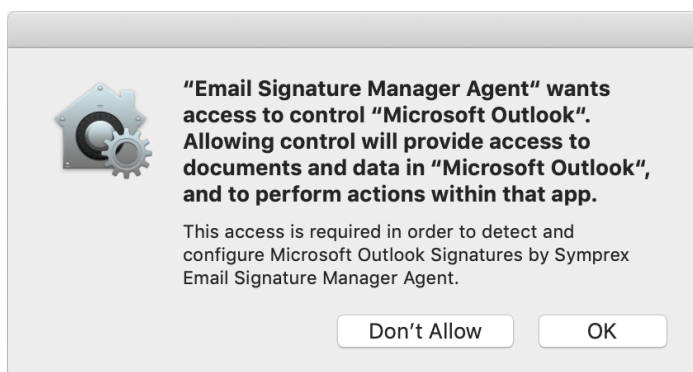
Click “Open System Preferences” to open the “Security & Privacy dialog”:



Click the padlock and authenticate, then check the “Email Signature Manager Agent” app and close the dialog.

### Microsoft Outlook

If this access is not granted, the following message will appear when using the agent:



Click “OK” to allow access.

### System Events

If this access is not granted, the following message will appear when using the agent:



**"Email Signature Manager Agent" wants access to control "System Events". Allowing control will provide access to documents and data in "System Events", and to perform actions within that app.**

This access is required in order to detect and configure Microsoft Outlook Signatures by Symprex Email Signature Manager Agent.

Don't Allow

OK

Click "OK" to allow access.