

Connected Systems

Outlook 2007 Add-in for SharePoint 2010 (Foundation and Server)

User Guide

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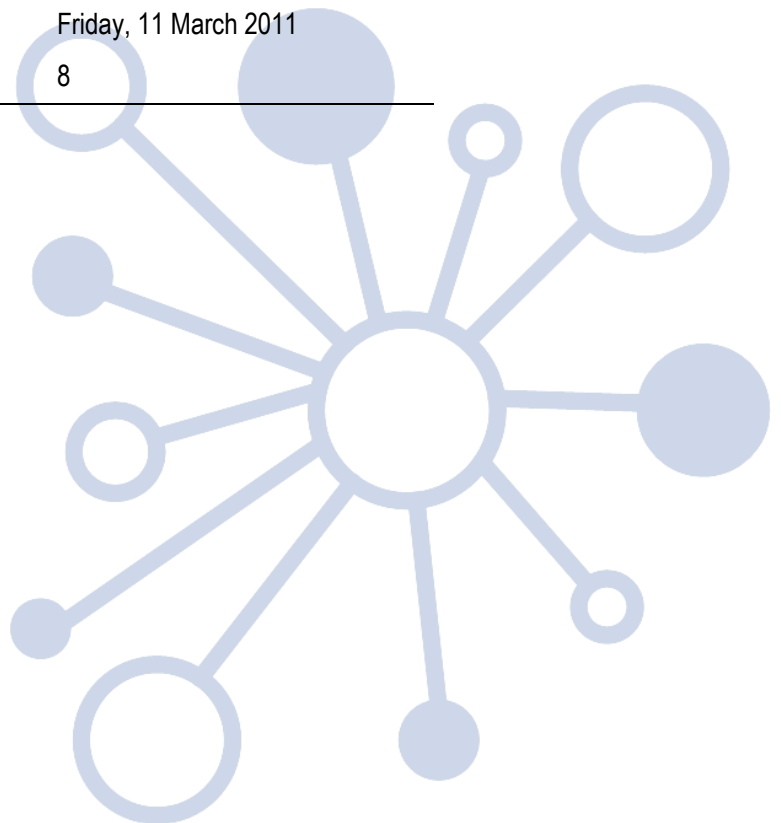


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1 Introduction

It is undeniable the importance email plays in any organisation. In most modern businesses, it is the primary means of business communication and collaboration. A large portion of everyone's working day is spent in Outlook. Email is now considered as important or in some cases more important than an organisation's phone system. Even though many people curse the amount of email they receive and respond to, it is also undeniable that email provides critical productivity gains.

Given the critical importance of email, coupled with the amount of time spent using the Outlook client each day, the idea of leveraging Outlook for easy storage of emails in SharePoint 2010 is very compelling and helps achieve a seamless user experience.

The Connected Systems Outlook 2007 Add-in for Microsoft SharePoint 2010 helps customers move and copy emails from Outlook 2007 to any SharePoint document library they have access to.

The easy to use interface, fully integrates with SharePoint 2010 to deliver seamless union between Outlook emails and the SharePoint repository. The aims of the Connected Systems Outlook 2007 Add-in for SharePoint 2010 are to improve on the SharePoint platform by delivering:

- ❖ Secure and seamless Outlook 2007/SharePoint 2010 Integration
 - Copy/move emails to SharePoint libraries
 - Respects SharePoint User context security, security trims what user cannot access.
 - Supports both "use default credentials" and alternate credentials to connect securely to SharePoint.
 - Respects check-in/out settings on document libraries
 - Selectable/Bulk check-in supported per document library
 - Supports folders within document libraries
 - Support setting metadata fields for mandatory fields
 - Steps through each email upload prompting user for metadata.
 - Setting the name of the email message filename before copying to SP 2010
 - Attachments embodied with MSG file and saved to SharePoint.
- ❖ Outlook 2007 menus support
 - Supports right-click context menu – "Send to SharePoint"
 - Supports toolbar menu – "Send to SharePoint" button
 - Supports the Tools menu for configuration and "About Me" screens.
- ❖ Fast, easy to use
 - Settable "Confirm Successful Copy" to notify user of result (Successful/Unsuccessful).
 - Settable "Confirm Overwrite" to warn user of file overwrites
 - On demand loading to assist with performance issues for very large SharePoint sites and libraries.
- ❖ Easy configuration and management
 - Outlook Tools menu access to configuration settings
 - Log tab tracks events for easy troubleshooting.
 - Easy installation process.

The Connected Systems Outlook 2007 Add-in for SharePoint 2010 adds significant value to Microsoft SharePoint 2010 by allowing customer to securely and easily copy and move emails and attachment to SharePoint document libraries.

2 How to use the Outlook 2007 Add-in for SP 2010?

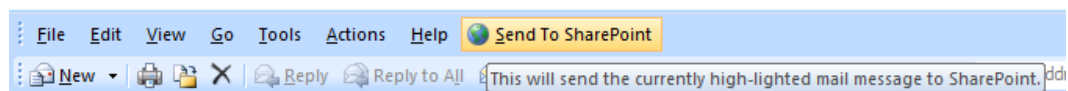
2.1 What does it install?

The Outlook 2007 Add-in for SharePoint 2010 installs the following components:

- ❖ Core
 - Outlook 2007 VSTO Add-in
 - Digital Certificate
- ❖ VSTO Requirements
 - Windows Installer 3.1
 - .NET Framework 3.5
 - 2007 Microsoft Office Primary Interop Assemblies
 - Visual Studio Tools for the Office system 3.0 Runtime

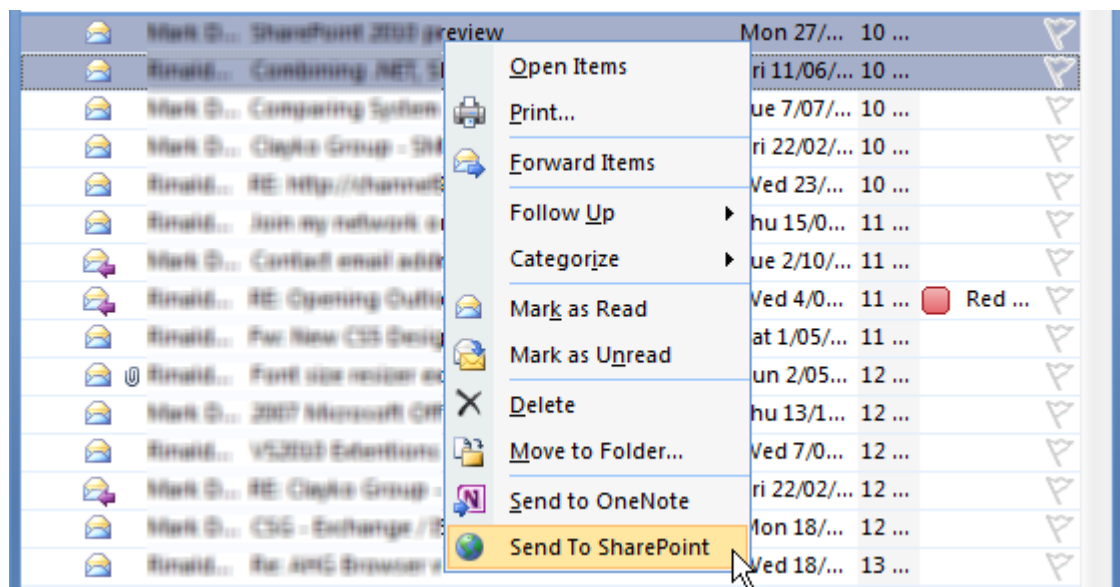
2.2 Within Outlook 2007

Once configured with the correct SharePoint 2010 site name, the Outlook 2007 Add-in will automatically load with Outlook.

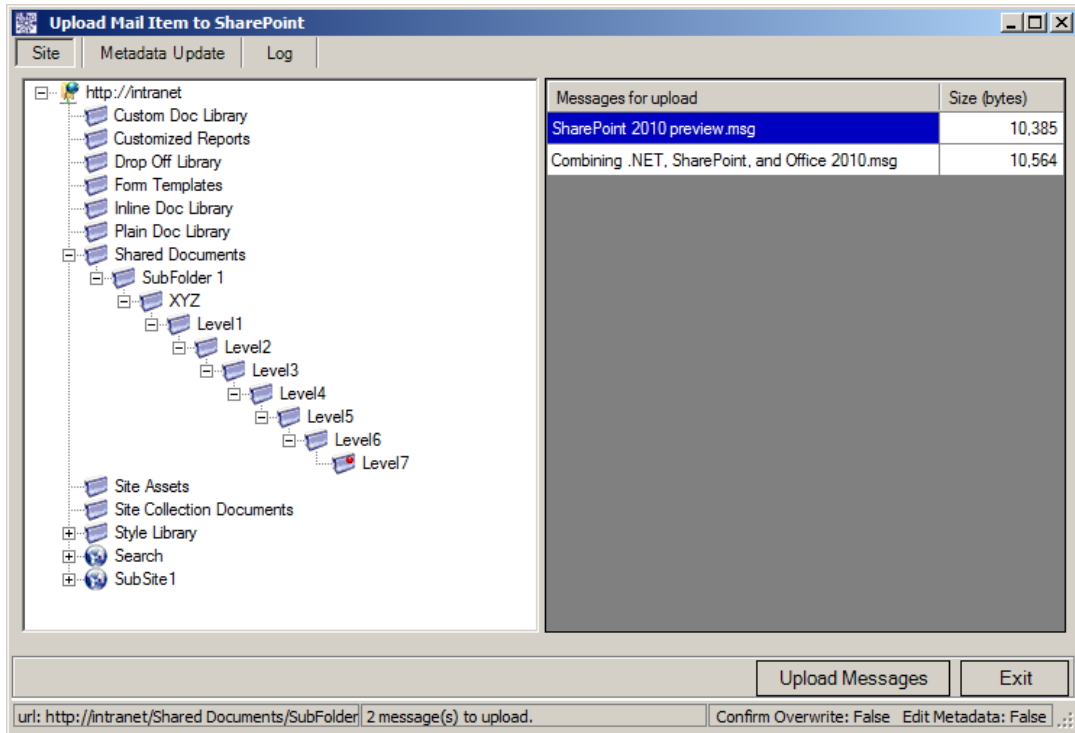


An easy to use button is added to the menu for users to select.

A user may select one or more messages and then initiate sending them to SharePoint by either selecting the button on the toolbar (as mention above), or right-mouse clicking and selecting the 'Send To SharePoint' context menu item



Please Note: A keyboard shortcut "Alt S" (Send to SharePoint) is also available to perform the same task.



You may be prompted for credentials to connect to the SharePoint site.

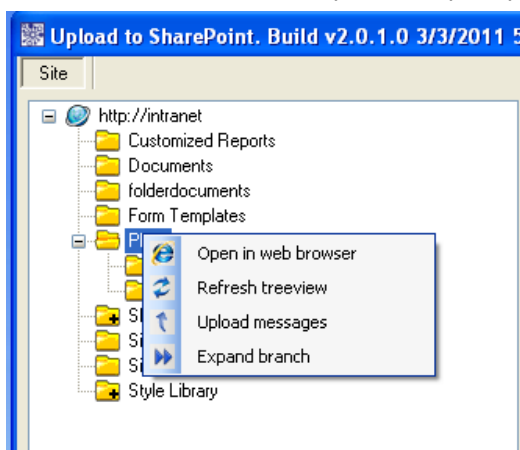
2.2.1 Check-in/out

Selecting a document library that has check-in/out enable will toggle the ability to do bulk check-ins. The check-in check box will display to the left of the Upload Messages button.



2.2.2 Site tab

The Site tab provides two panels. On the left is a graphical treeview representation of the SharePoint web site including all the document libraries that the user has access to. The treeview itself has a context popup menu which may be displayed by right-mouse-clicking on a tree node.



2.2.2.1 Renaming Email (MSG file) before saving to SharePoint

The Outlook 2007 Add-in for SharePoint 2010 allows users to rename the email message file (.msg) before saving to SharePoint. By default, the filename is set to the subject text of the email.

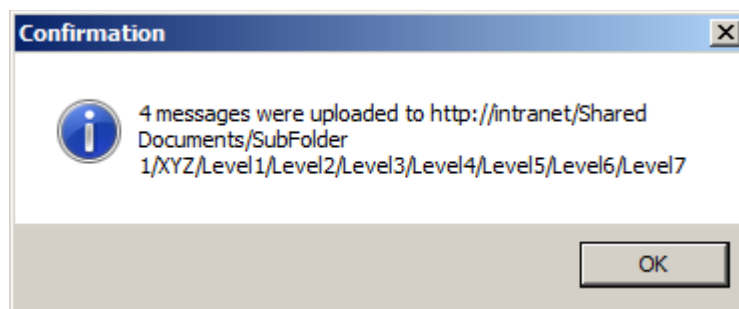
In the right-hand panel of the Site tab, select each entry and press either F2 or click inside the name field to rename the file.

2.2.2.2 Upload Messages – GO!

Once the user is happy with the email file names, they can select Upload messages. During this process, the Add-in can return certain messages back to the user based on the configuration settings.

2.2.2.2.1 Confirm successful copy

If the “Confirm successful copy” check box is selected in the configuration, the Add-in will display a ‘Copy Confirmation Feedback Message’ at the end of the copy procedure. This dialog tells the user how many messages were copied to SharePoint and to which document library.



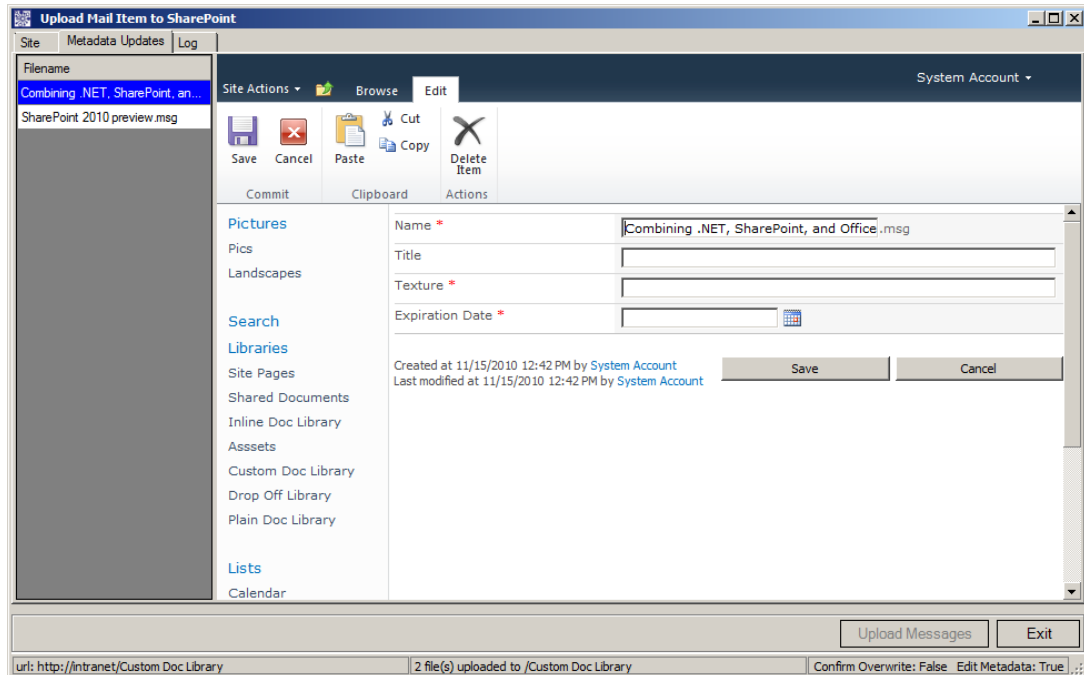
2.2.2.2.2 Confirm Overwrite

If the “Confirm overwrite” check box is selected in the configuration, the Add-in will prompt the user to overwrite a file in a document library if it exists.



2.2.3 Metadata update tab

The 'Metadata Updates' tab of the upload form allows the user to edit metadata for each document that has been uploaded.



The Metadata Updates screen is split into two panels. The left panel allows the user to select the files that have uploaded. The highlight item on the left corresponds to the metadata panel on the right. The right panel is a web browser dialog that displays the metadata which can be updated by filling the fields and clicking the Save button for each one.

The next item on the left panel is presented automatically after each subsequent metadata screen has been saved.

2.2.4 Log/Messages tab

This tab displays a log of events; these can contain both success messages and failure messages. This tab's purpose is to assist with troubleshooting any issues relating to failures.