

Connected Systems

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

Installation Guide

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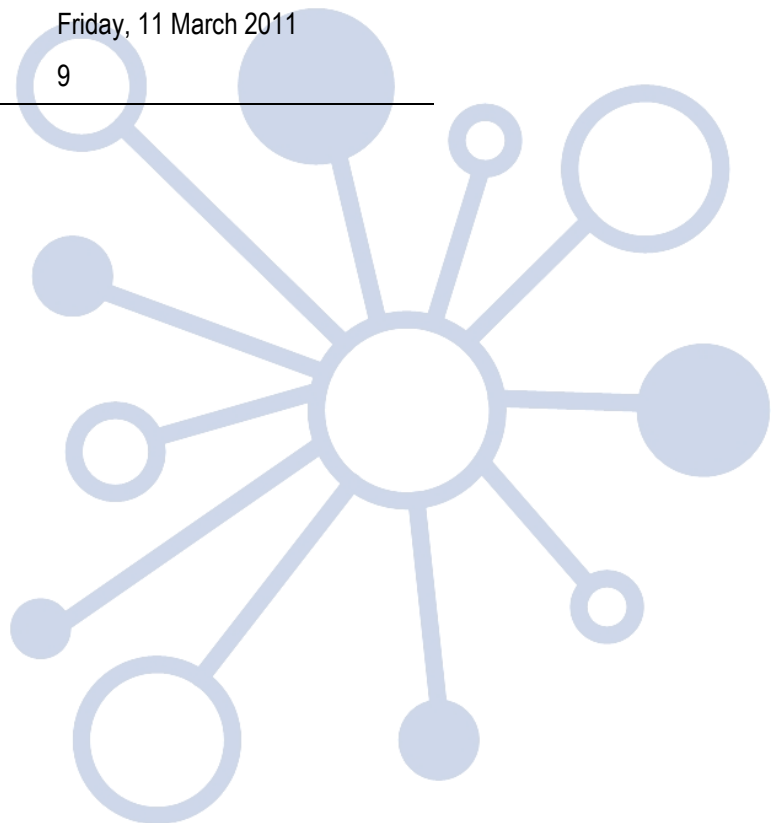


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1 Installation

The Connected Systems Outlook 2007 SharePoint Add-in is a VSTO¹ program that is used in conjunction with Outlook 2007 to send email messages to SharePoint 2010 document libraries. The purpose of the add-in is to make the process of uploading mail messages to the SharePoint document libraries as easy and as seamless as possible.

1.1 Requirements

1.1.1 Software Requirements

The following software is required to install VSTO the CS Outlook 2007 Add-in for SharePoint 2010:

- Windows XP SP3, Vista or Windows 7 (either 32-bit or 64-bit).
- Office 2007. Specifically Outlook 2007 (64-bit Office is not supported). Later service packs are recommended.
- SharePoint 2010 on the server

The Outlook Add-in setup will fulfil all other requirements:

- .NET framework 3.5
- Office 2007 Shared PIA
- Outlook 2007 PIA

1.1.2 Hardware Requirements

The following are the recommended minimum hardware requirements to run the VSTO addin.

Component	Requirement
Processor	1 GHz processor. Recommended: 1.4 gigahertz (GHz) processor or better
Free RAM	192 MB for the Visual Studio Tools for Office runtime. 100 MB for the Add-in Recommended: 512 MB.
Available Hard Disk Space	1 GB of available space required on system drive.
Operating System	Windows XP + Service Pack 3, VISTA + Service Pack 2 or Windows 7
Video	1024 x 768, 16-bit colour.
Mouse	Microsoft Mouse or compatible pointing device.

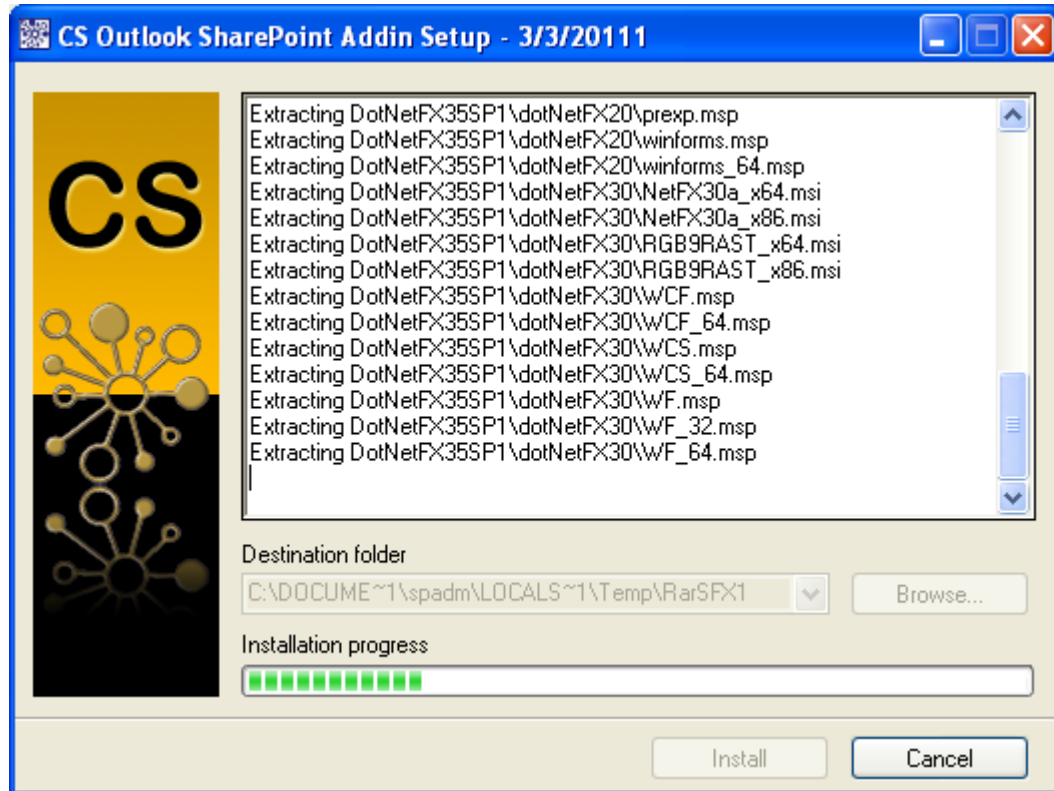
Please Note: Increasing your RAM above the recommended system configuration will increase your performance.

¹ Visual Studio Tools for Office (VSTO) is a set of development tools available in the form of a Visual Studio add-in (project templates) and a runtime that allows Microsoft Office 2003 and later versions of Office applications to host the .NET Framework Common Language Runtime (CLR) to expose their functionality via the .NET type system.

1.2 Add-in Installation

The OA_Install.exe² is a self-extracting archive containing all the files necessary for installing the Add-in. Clicking on this executable will launch the Add-in setup. The first part of the installation is for the extraction and fulfilling the Add-in requirements (the current directory is used for the install. It is therefore recommended that this archive is moved to a temporary folder and run from there).

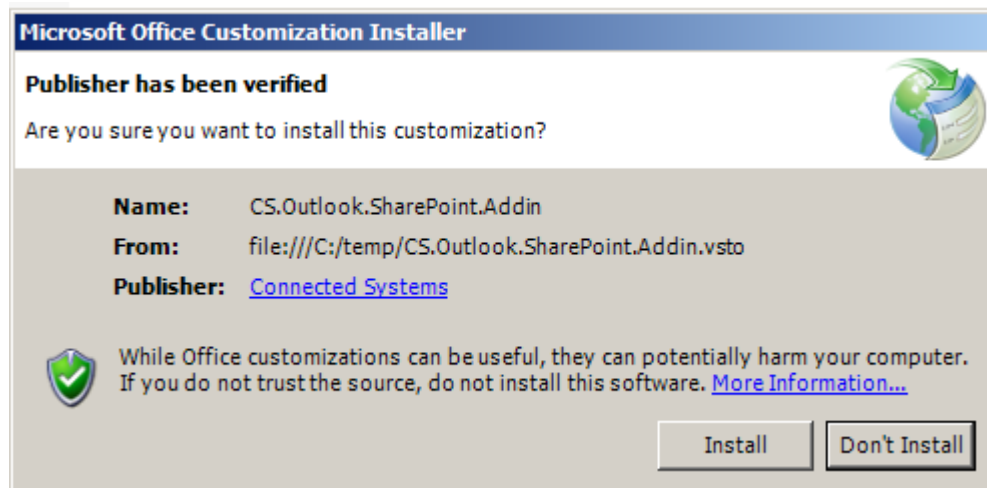
All requirements are fully automated and may take a while to complete.



The last part of the installation is registration of the Add-in.

² The fully extracted version of the installation is provided on the DVD as a matter of convenience. To start the installation run the Launch.exe

1.2.1 VSTO Installer



Click the Install button to complete the process. The Add-in will now be automatically launched when Outlook 2007 is started.

1.2.2 Configuration File

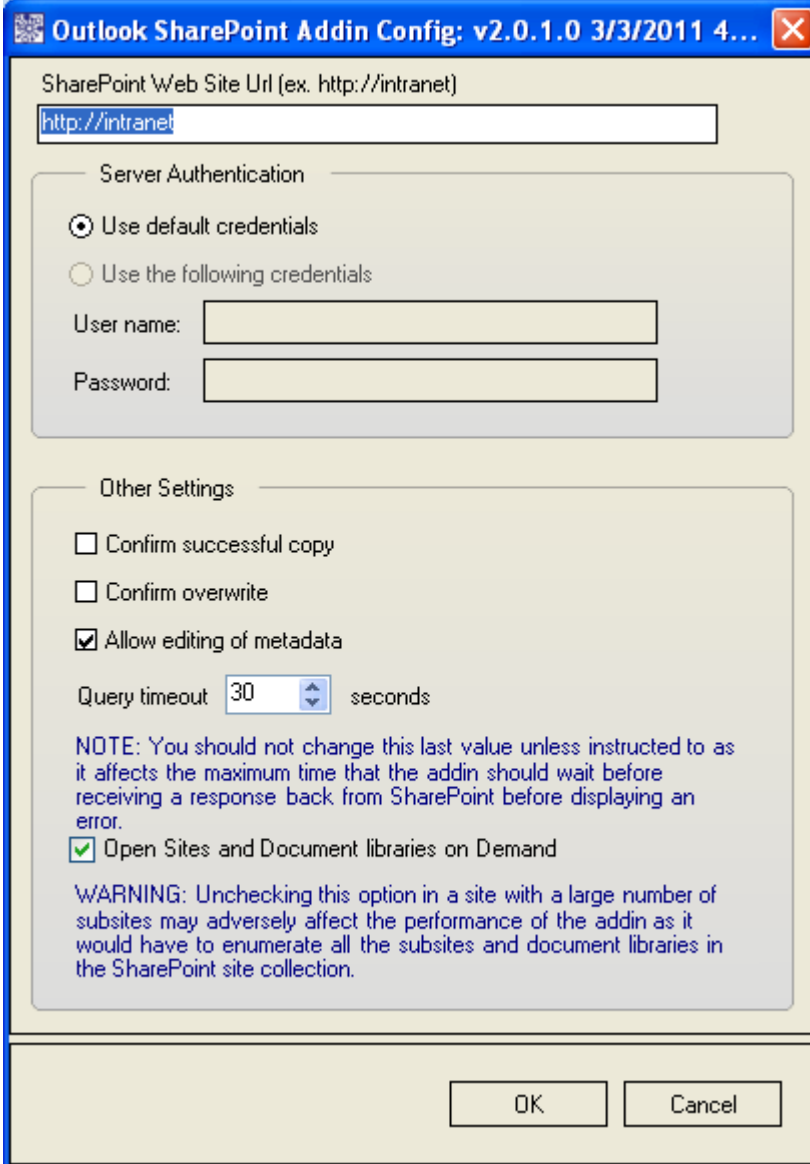
When you start Outlook for the first time, the Add-in will look for and optionally create a configuration file in the %APPDATA% path (CSOutlookAddin.config) of the users' hard disk. This config file contains program information for the Add-in. The following is an example config:

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>
    <add key="SharePointSiteUrl" value="http://intranet" />
    <add key="SharePointSiteName" value="intranet" />
    <add key="SharePointDialogMode" value="True" />
    <add key="FirstRun" value="no" />
    <add key="UseImpersonation" value="False" />
    <add key="ImpersonatedUser" value="" />
    <add key="ConfirmSuccessfulCopy" value="False" />
    <add key="ConfirmOverwrite" value="False" />
    <add key="AllowMetadataEdits" value="True" />
    <add key="TimeoutValueSetting" value="30000" />
    <add key="FormState" value="0" />
    <add key="FormXSetting" value="100" />
    <add key="FormYSetting" value="100" />
    <add key="FormWSetting" value="930" />
    <add key="FormHSetting" value="548" />
    <add key="NodeThatWasLastSelected" value="http://intranet" />
  </appSettings>
</configuration>
```

Please Note: This configuration file should not be manually edited.

1.3 Configuration Process

Once installed, run Outlook 2007. The first time Outlook 2007 is launched after the successful installation of the Add-in, the Add-in will display a configuration menu will display. The main configuration item here is the SharePoint Web Site Url. This is required by the Add-in so can locate the SharePoint site.



The screenshot shows a dialog box titled "Outlook SharePoint Addin Config: v2.0.1.0 3/3/2011 4...". The dialog is divided into several sections:

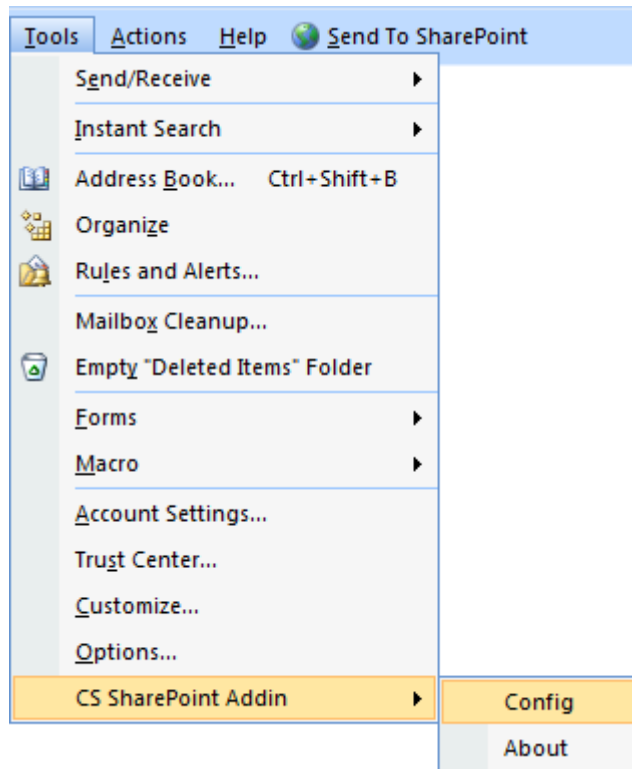
- SharePoint Web Site Url (ex. http://intranet):** A text input field containing "http://intranet".
- Server Authentication:** A section with two radio buttons:
 - Use default credentials
 - Use the following credentialsBelow these are two text input fields labeled "User name:" and "Password:".
- Other Settings:** A section with three checkboxes:
 - Confirm successful copy
 - Confirm overwrite
 - Allow editing of metadataA "Query timeout" spinner is set to "30" seconds. Below this is a blue "NOTE" text: "NOTE: You should not change this last value unless instructed to as it affects the maximum time that the addin should wait before receiving a response back from SharePoint before displaying an error." At the bottom of this section is a checked checkbox: Open Sites and Document libraries on Demand. Below this is a blue "WARNING" text: "WARNING: Unchecking this option in a site with a large number of subsites may adversely affect the performance of the addin as it would have to enumerate all the subsites and document libraries in the SharePoint site collection."

At the bottom of the dialog are "OK" and "Cancel" buttons.

1.3.1 SharePoint Web Url

The only required field is a valid SharePoint Url . Once this has been has been provided, the user can click the OK button and the Add-in is ready to use.

Please Note: The configuration screen above is available from the Outlook 2007 > Tools menu, as indicated in the graphic below.

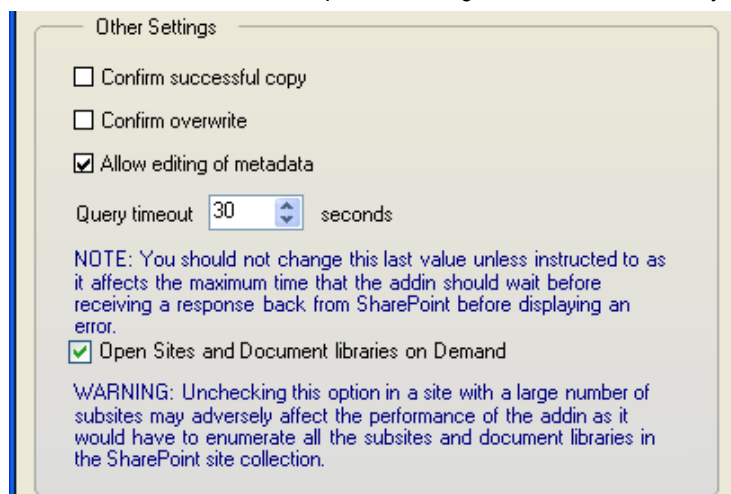


1.3.2 Server Authentication

The default setting for authenticating against the SharePoint web site is to use the credentials of the currently logged on user. This means that the user must have a valid SharePoint login as well as access to the SharePoint Sites and Document Libraries of the target site collection.

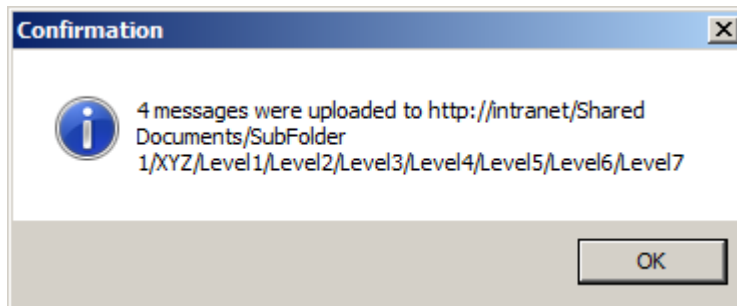
1.3.3 Other Settings

The Add-in has a few other optional settings which control the way we interact with SharePoint:



1.3.3.1 Confirm successful copy

Ticking this will tell the Add-in to 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.



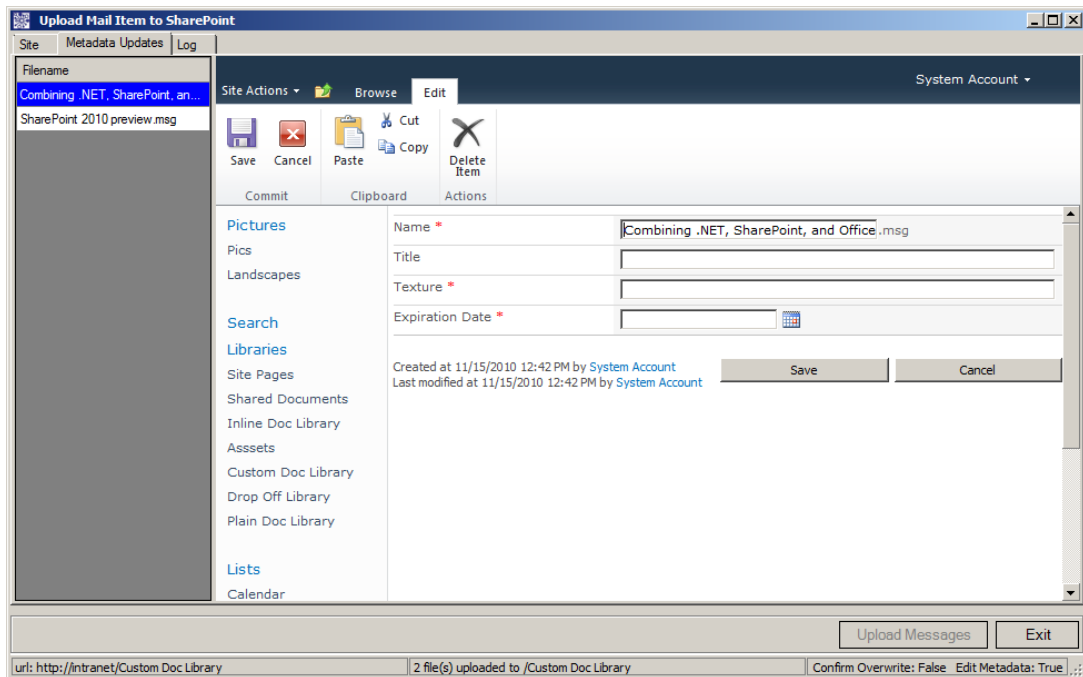
1.3.3.2 Confirm Overwrite

When this checkbox is set the Add-in will prompt the user to overwrite a file in a document library if it exists.



1.3.3.3 Allow editing of metadata

This option is a special mode which allows the user to update any metadata that is required by the SharePoint document library. The 'Metadata Updates' tab of the upload form allows the user to edit metadata for each document that has been uploaded.



The Metadata Updates tab has a data grid on the left. This grid allows the user to select the files that have uploaded. A corresponding web browser to the right of the dialog displays the metadata which can be updated by filling the fields and clicking the Save button for each one (See Figure 7: Updating metadata.).

1.3.3.4 Query Timeout

The Add-in has been written utilising the Microsoft SharePoint 2010 client API. Ultimately this API makes use of web services which have a Request Timeout value associated with them (the amount of time that a request is directed to wait in the event of no response back from the server). By default this is of the order of 180 seconds which may be too much in some instances since the user may not get feedback that SharePoint is unavailable for a full 3 minutes. A more realistic value would be around 30 seconds. In most circumstances this timeout value should never be changed.