SharePoint Publisher for Outlook

Installation and Configuration
('Per User Installation' and 'Per Machine Installation')

With this guide, you would be able to quickly and easily configure AssistMyTeam SharePoint Publisher settings, choose and link destination SharePoint lists with Outlook so that you can start publishing Outlook items to SharePoint in asingle click or through automation.

For '**Per User Installation**' *(ideal for standalone single user/workstation)*
SharePointPublisherSetup_x86.zip (*for 32-bit Outlook*)
SharePointPublisherSetup_x64.zip (*for 64-bit Outlook*)

For '**Per Machine Installation**' *(ideal for installing on Citrix and Terminal Servers)*
SharePointPublisherSetup_x86_Citrix.zip (*for 32-bit Outlook*)
SharePointPublisherSetup _x64_Citrix.zip (*for 64-bit Outlook*)

(NOTE: 'Per Machine Installation' setups are only available to Enterprise License users)

Extract these file contents to a folder.

NOTE: 'Per User Installation' and 'Per Machine Installation'
In 'Per User Installation', the SharePoint Publisher install is performed 100% on the local system and nothing is installed on your Exchange or Windows Server. Further, this install is intended to serve only the current logged on user of the system/workstation and will be installed under the user's application data folder (instead of Programs Files folder) and no elevated permission is required. So, there won't be a prompt from UAC to allow this install unless you change the install directory to say, Programs Files which will warrant an elevated permission/UAC prompt. If the same system is used by multiple users, each one need to install the add-in on their profile with the default installation folder location.

'Per Machine Installation': If you have the need to have a single install that serves all users of the system (i.e., the files will be installed under Program files folder and the add-in will be registered under HKEY_LOCAL_MACHINE registry hive rather than HKEY_CURRENT_USER), download the Citrix/Terminal Server version of the setups to perform a per machine installation.

Requirements:

- *.NET framework 4.5 or above*
- *Outlook 2010, 2013, 2016, 2019, 2021 and 365 (both 32-bit and 64-bit versions are supported).*
- Any SharePoint version starting with WSS 2.0 to the latest SharePoint 2016 including online/cloud SharePoint such as Office 365.

There are two (2) sections:
 a) **Files Installation,** and b) **Choose Destination SharePoint Lists**
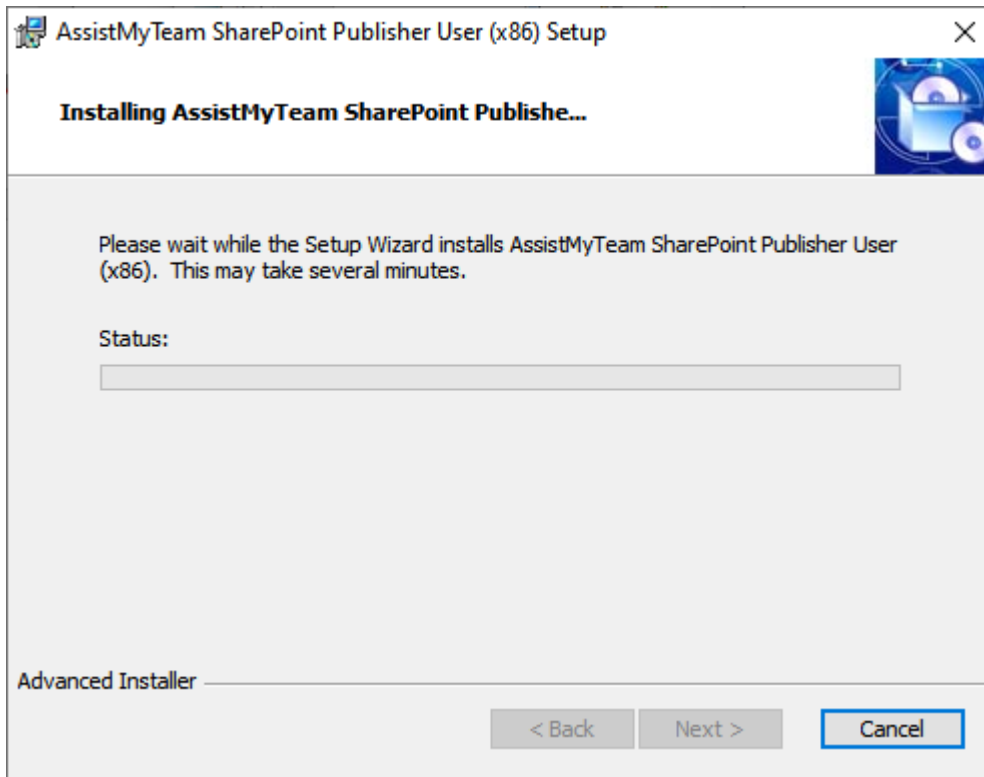
I) Files Installation

Step 1. Run the *SharePointPublisherSetup_xXX.exe* to start the installation. Click '**Next**' to Continue. If Outlook 2010 or later is not installed, the setup wizard will not be able to proceed. Please ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install an Outlook add–in.
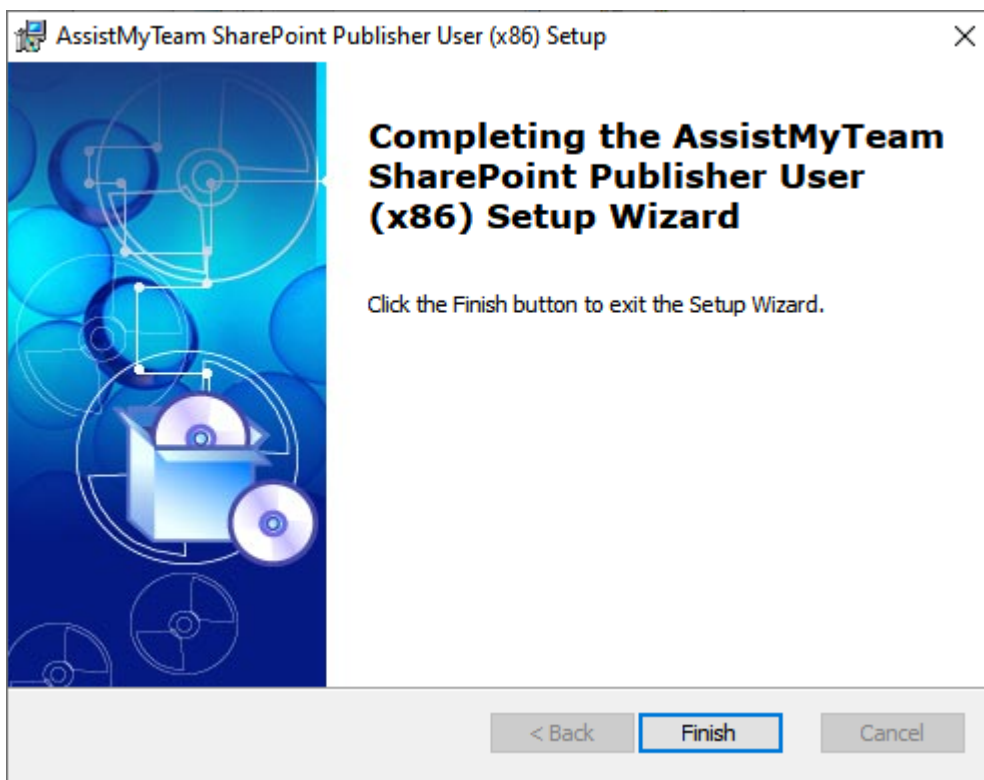

Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission.
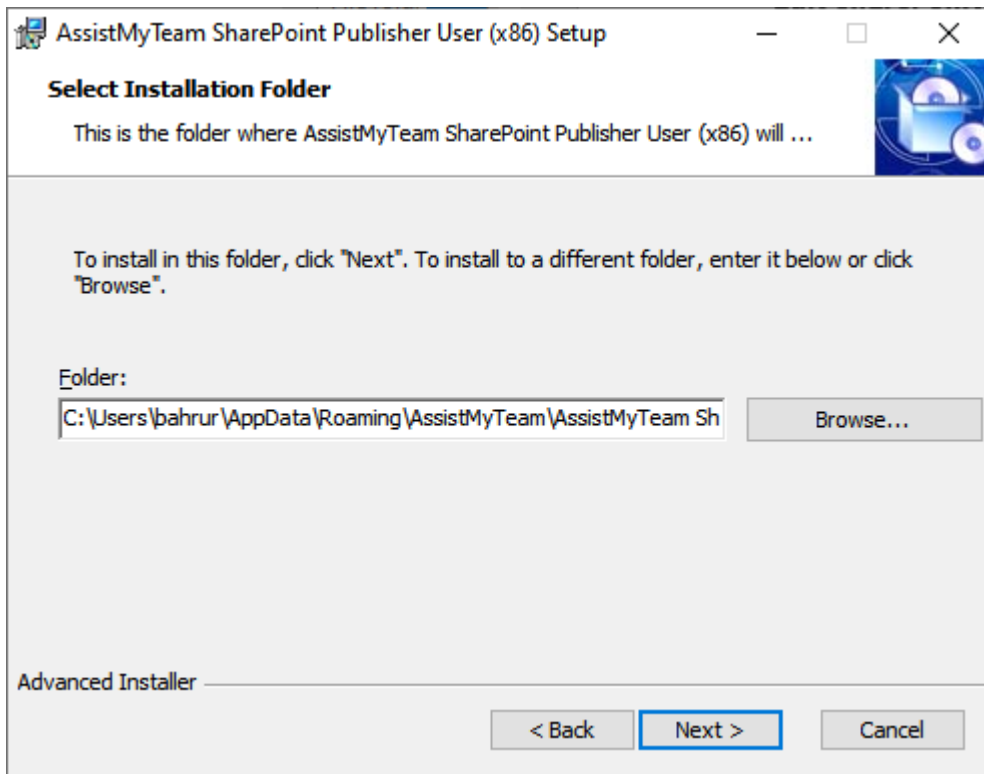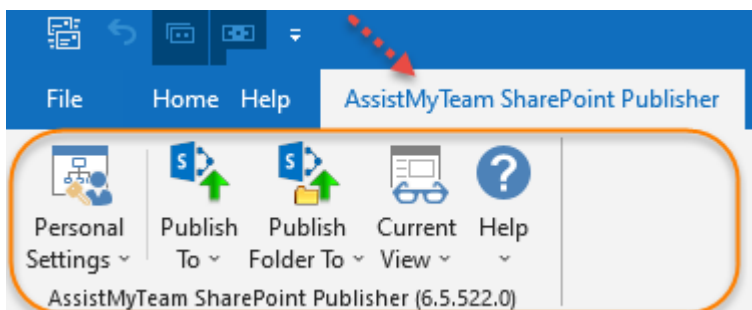
Step 3. It just takes a few minutes to complete the whole copying process.

Step 4. Click '**Finish**'. This ends the files installation process in your system.

Now start Microsoft Outlook and you will see a dedicated tab with the title *'AssistMyTeam SharePoint Publisher'*.

## II) Choose Destination SharePoint Lists

Before you can start publishing Outlook emails, appointments or tasks to SharePoint, you need to choose the destination SharePoint lists, to which the captured metadata from Outlook items will be published. You will also need to define the mapping between the Outlook fields and the SharePoint fields. There are two ways of doing it:

### First Technique: Specify SharePoint Lists for Outlook item types

You can define any number of common SharePoint lists that will be used for publishing from any Outlook folder. Commonly configured SharePoint lists and mappings act as a template for all Outlook folders and would appear in the **'Publish To'** drop-down menu in the SharePoint Publisher toolbar or ribbon.
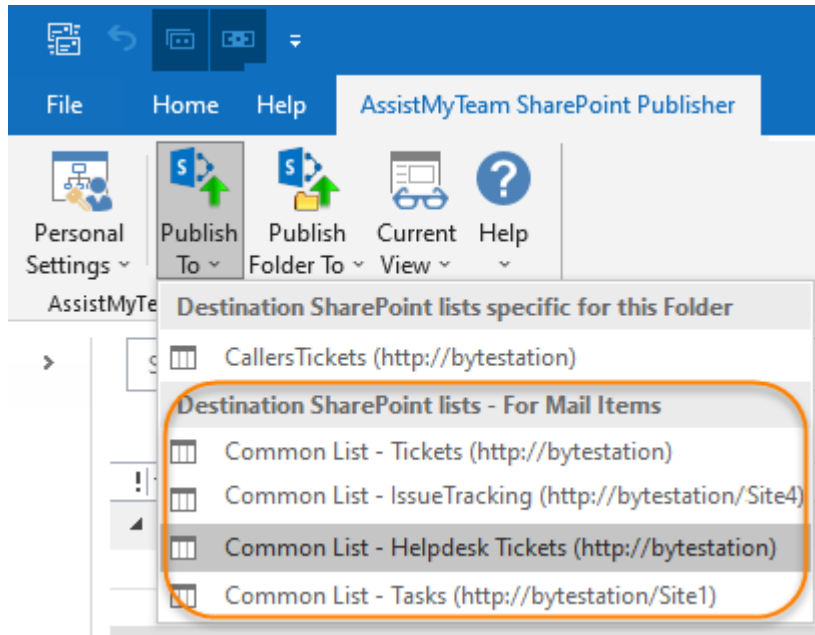

To define a common SharePoint list and mapping for all Outlook folders, go to **Personal Settings** menu > **'Configure Common SharePoint lists'**:
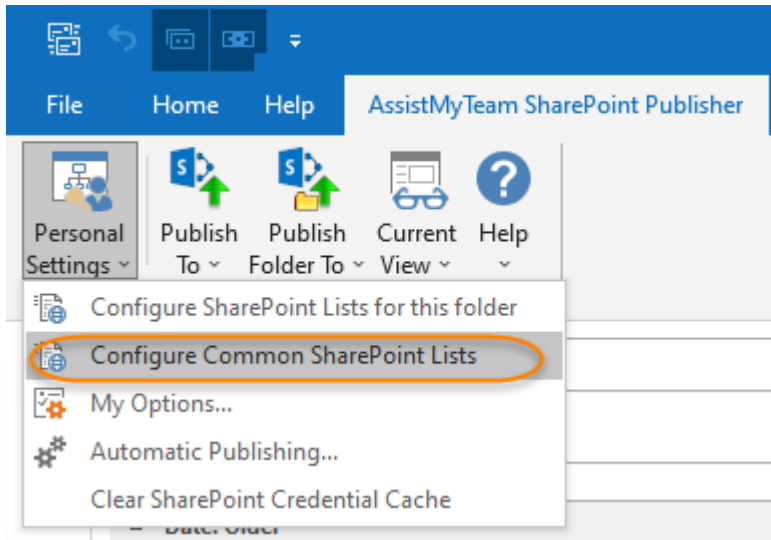
In this common SharePoint lists panel, you can choose for which particular type of Outlook item, will the configured SharePoint list and mapping be associated with. Type of items can be *mail, appointment, task, journal or contact*.
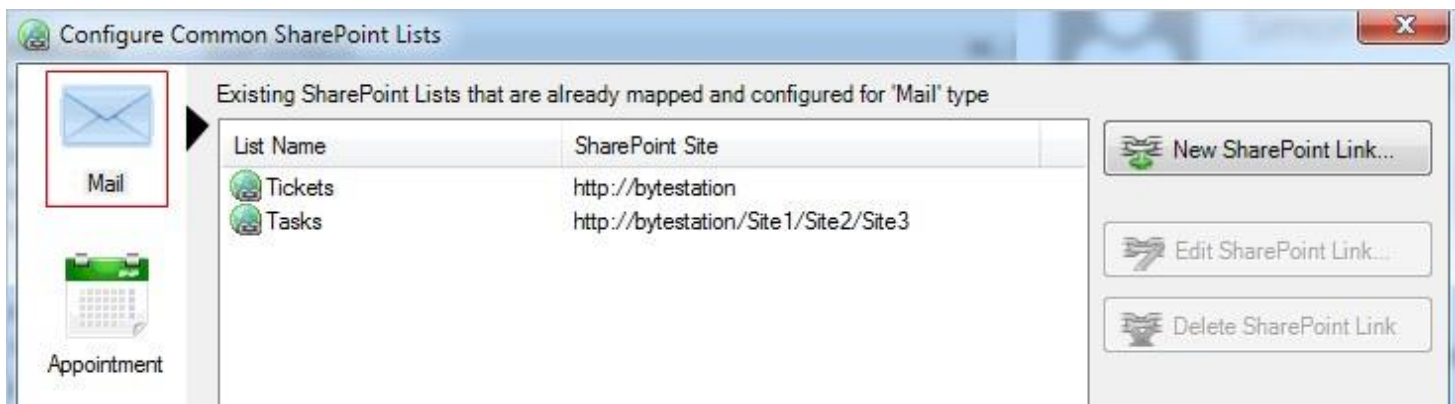
To link a SharePoint list to a particular Outlook item type, say 'Mail', click **'New SharePoint Link…'**. This will prompt you to enter the SharePoint site URL to choose an existing SharePoint list, or create a new list directly from the add-in.
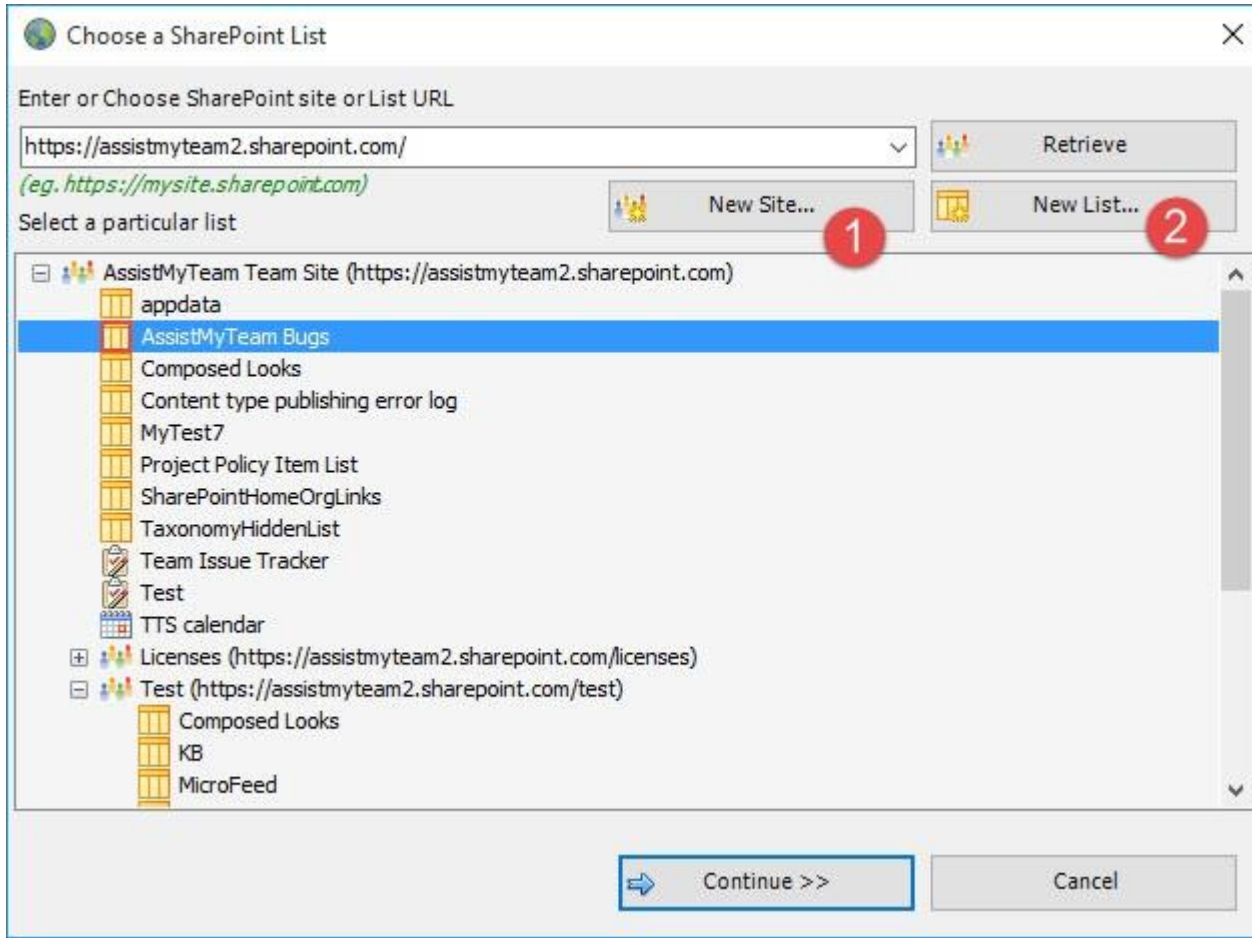
You can choose to create – new site or list directly from the add-in. No need to go to your web browser.

1 **New Site** – Create a new site directly under the chosen parent site to be used exclusively for SharePoint Publisher add-in. By default, the site will be created as a blank site, unless a different site template is specified.
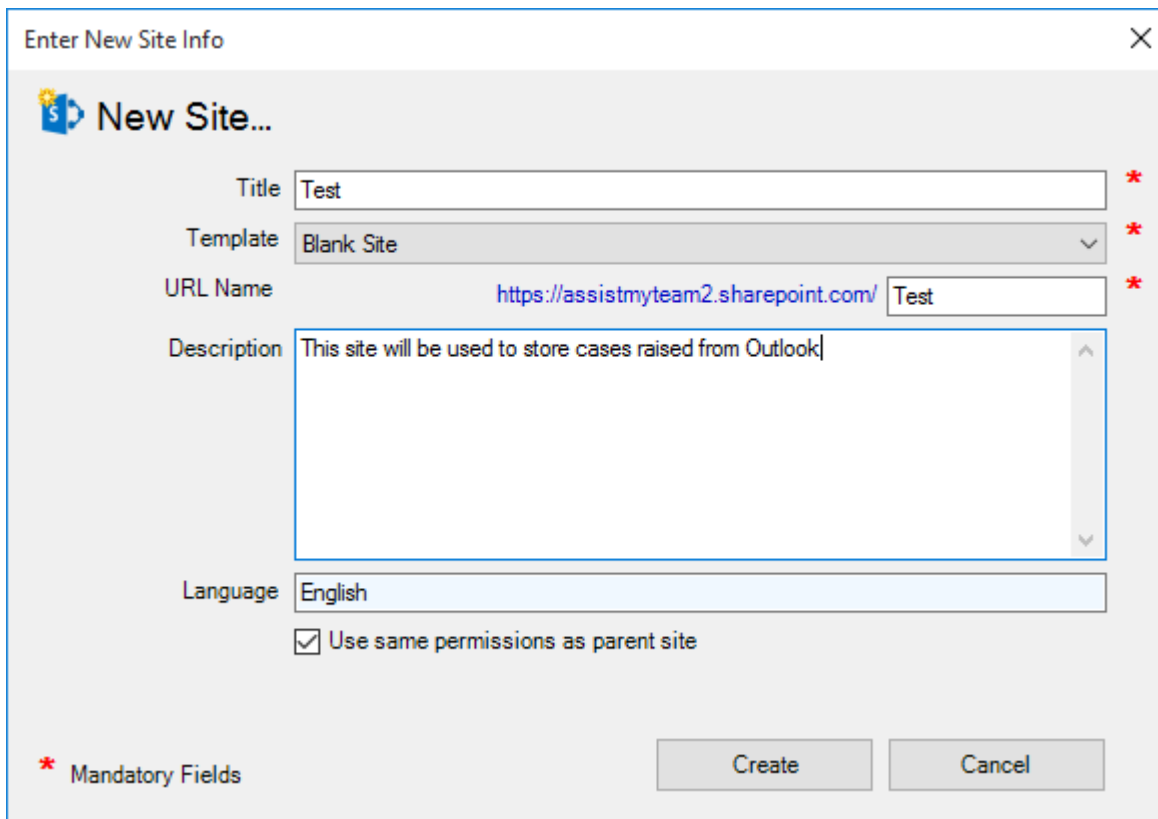
2   **New List** – You can choose to create a new list directly under the chosen site. By default, the list would be created using the 'Issue Tracking' template available in your SharePoint. However, you can change the template from the drop down.

After choosing a destination SharePoint list (either by creating a new one, or by selecting an existing list), you can proceed to start mapping the fields between Outlook and SharePoint.

Here is the mapping panel which will show up and this is where you need to map fields between Outlook mail and the fields of the chosen SharePoint list.


A mapping is nothing but an association between an Outlook field *(e.g., subject of the mail item)* to a specific SharePoint list field *(e.g., Title)*. You have complete control over which data goes to the SharePoint list from Outlook. In the mapping dialog box (above), the first column lists all the email fields as available in Outlook. The

second column displays the data type of the field. In the last column, there is a drop-down list on each row, consisting of all available SharePoint fields. Simply choose a SharePoint field from the drop-down box to map it tothe corresponding Outlook field. For example, in the screenshot above, Outlook field *'Subject'* is mapped to SharePoint field *'Title*.

You can also choose to auto create the fields in the SharePoint list as well as auto-map the fields between Outlook and SharePoint.

1   **For all unmapped fields** – Click this option under the *'Auto Create & Map fields'* menu to create all the Outlook fields (that have not been mapped yet) in the chosen SharePoint list and complete the mapping automatically. If the chosen SharePoint list have any matching existing fields, instead of creating new ones, the add-in will try to use them to map with the Outlook fields. For instance, if the chosen SharePoint list was created based on the 'Calendar', the list already contains predefined fields such as *Title, Start Date, End Date, Description* etc. which could be re-used.

**2**   **For the following fields** – Click this option under the *'Auto-Create & Map fields'* menu to choose specific Outlook fields of interest that will be auto-created in the chosen SharePoint and mapped automatically.
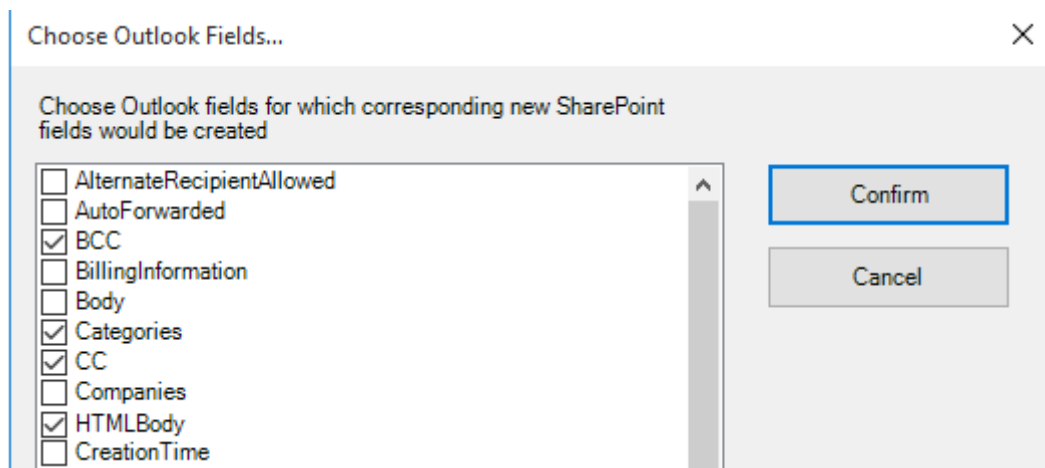

Optionally, to have finer control, you can also manually create new fields in the chosen destination SharePoint list and map with the outlook fields.

Create New SharePoint Field - on the fly

In the drop-down list of the SharePoint field, you will notice that there is an item **'[NEW LIST FIELD]'**. You can select this item to create a new field in the particular SharePoint list, directly from this mapping tool, so that you can map the specific Outlook field to this new SharePoint field, without requiring you to create it in your SharePointsite.
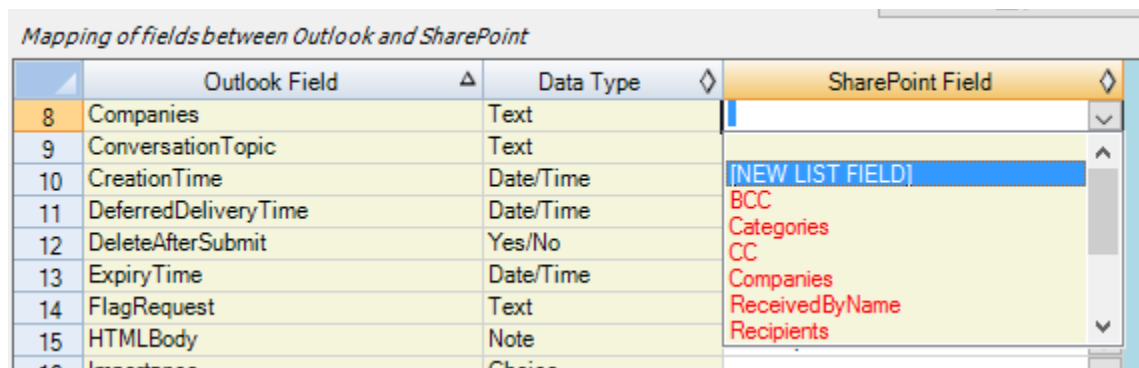
Specify a field name that you would like to appear in the SharePoint list. Only input valid characters and avoid using special characters such as symbols.
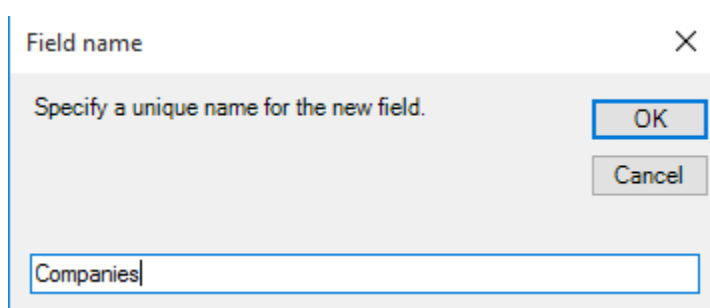
The new SharePoint field will have the same data type as that of the corresponding Outlook field.


If you have added multiple SharePoint lists in SharePoint Publisher add-in for a particular Outlook item type, you will noticethat the **Publish To'** drop down menu shows all of them. You can then simply choose the destination SharePoint list to which a new Outlook item will be published from the selected Outlook items.
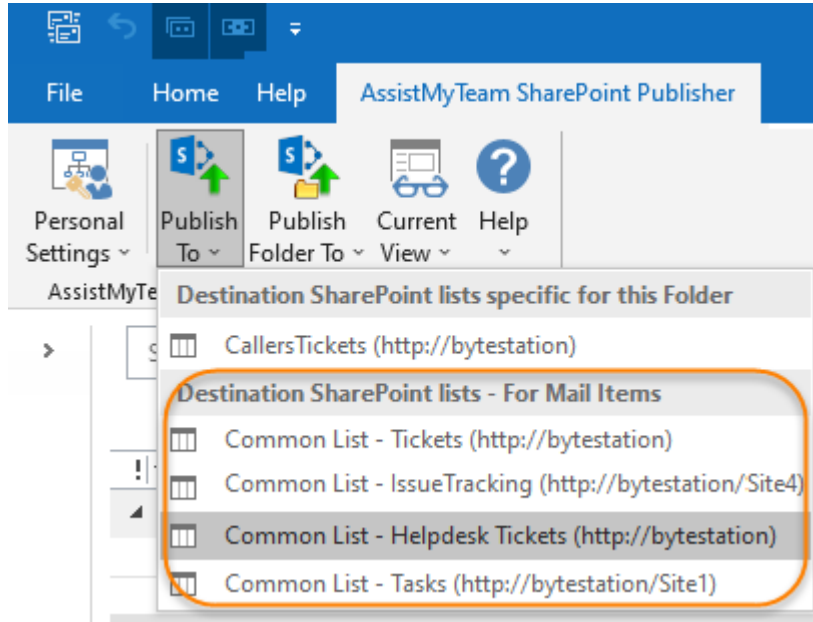
Likewise, you can specify SharePoint lists that will store published appointments from Outlook.
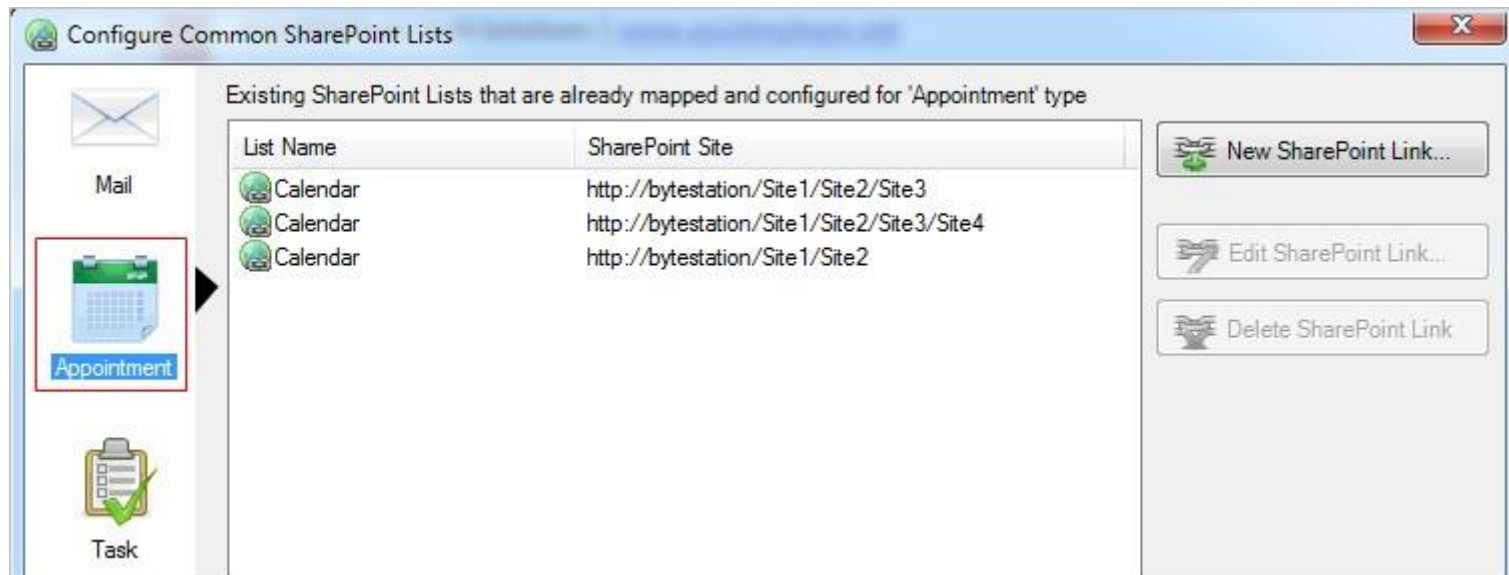
At any time, if you want to re-edit the mapping configuration of a linked SharePoint list, just select the list and click **'Edit SharePoint Link…'**.

To remove an existing fields mapping, select the particular list item and click **'Delete SharePoint Link'** button. This will permanently remove the selected mapping settings. *NOTE: The SharePoint list associated with this mapping is not deleted.*

SharePoint Authentication

If the SharePoint site uses the NTLM or windows authentication, the add-in will use the default credential to connect to the SharePoint. However, for form based or claimed based authentication (for example, Office 365 SharePoint online), it may prompt you to enter credential.

Check **'Remember'** so that SharePoint Publisher add-in can use thesame credential to logon to the SharePoint site in subsequent connection.

You can also specify the authentication mode that is used byyour SharePoint to allow connection to it. For instance, if your SharePointis configured for Windows authentication, choose **'NTLM'**. If your SharePoint site is secured with ADFS, you can also specify the STS site URL under the ADFS server to get the authorization token.

If the site uses a form-based authentication, then choose **'Forms'**whereas if it uses a claimed based authentication (for Office 365 SharePoint Online), choose **'Office 365'**.

## What SharePoint permissions is required?

You should have at least **'Contribute'** permission on the chosen SharePoint lists to publish and store any items from Outlook.

You can use any SharePoint version starting with SharePoint 2010 to the latest SharePoint 2016. You can also use Office 365 SharePoint Online too.

Second Technique: Specify SharePoint lists specific for a particular Outlook folder

You can choose also SharePoint lists that will only store items published from a specific Outlook folder. This is useful, when you have a custom form defined for that particular Outlook folder, and you want to be able to publish user defined data collected from the custom form to SharePoint.

To define a SharePoint list and mapping for a specific Outlook folder, go to **Personal Settings menu > 'Configure SharePoint lists for this folder'**:
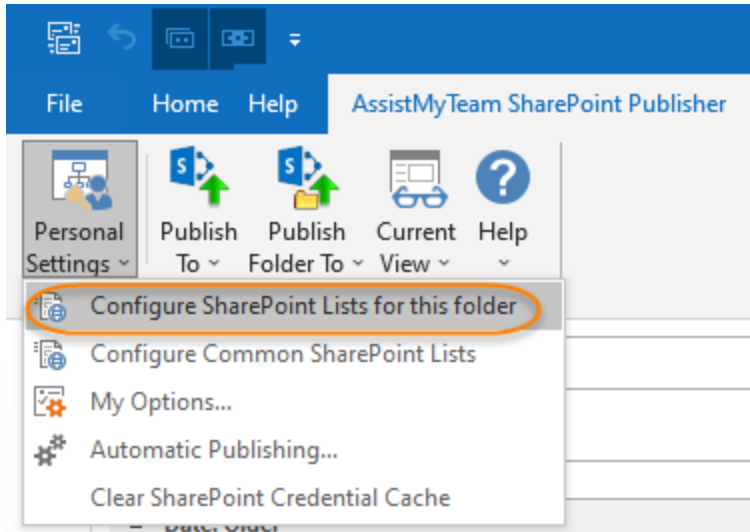
This Panel shows all the configured SharePoint list mappings done for this particular Outlook folder.
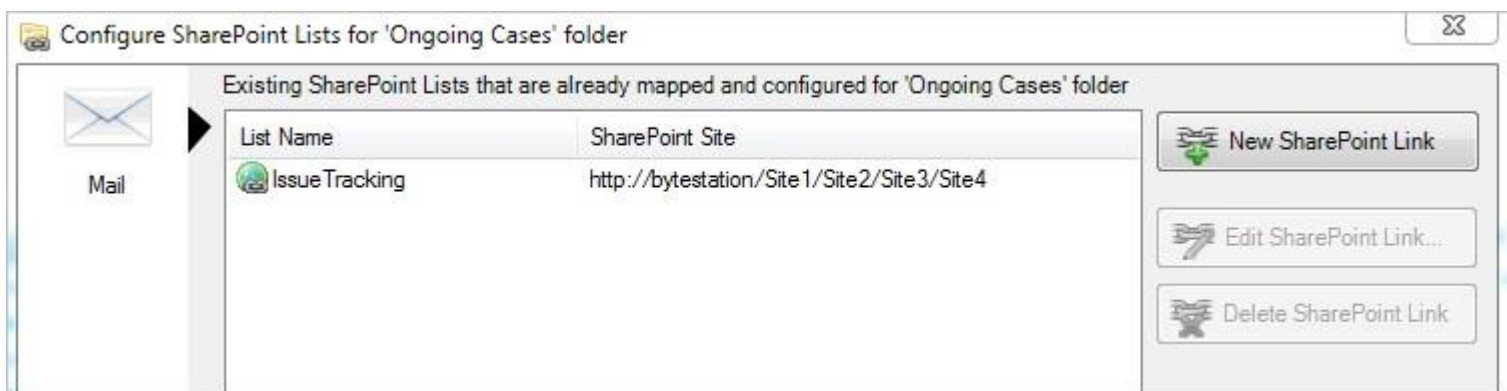
Click the **'New SharePoint Link'** button to configure a SharePoint list for use with this particular Outlook folder.

SharePoint Publisher add–in is now ready to publish new Outlook items to one or more of the chosen/linked SharePointlists.

*For more references and helps on performing these administrative configurations, refer to the PDF Help Manual, which can be invoke from **SharePoint Publisher toolbar or ribbon > Help > Help Topics**.*

You can also download the full PDF help manual directly from this link*.*

---- End of Install Guide