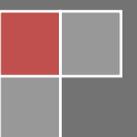V7

AssistMyTeam

SharePoint Publisher

For Outlook

An add-in for Microsoft® Outlook® that makes it very easy and effortless to publish your mails, appointments, tasks or contacts from Outlook to SharePoint either manually or on the fly.

Help Manual

1. Introduction

AssistMyTeam SharePoint Publisher brings SharePoint integration to Microsoft Outlook for seamless publication of Outlook items such as emails, appointments, tasks or contacts to SharePoint, where they can be shared with other users. It exists as an add-in in Microsoft Outlook, and extends the functionality of Outlook by binding within the internal logic and user interface of Outlook.
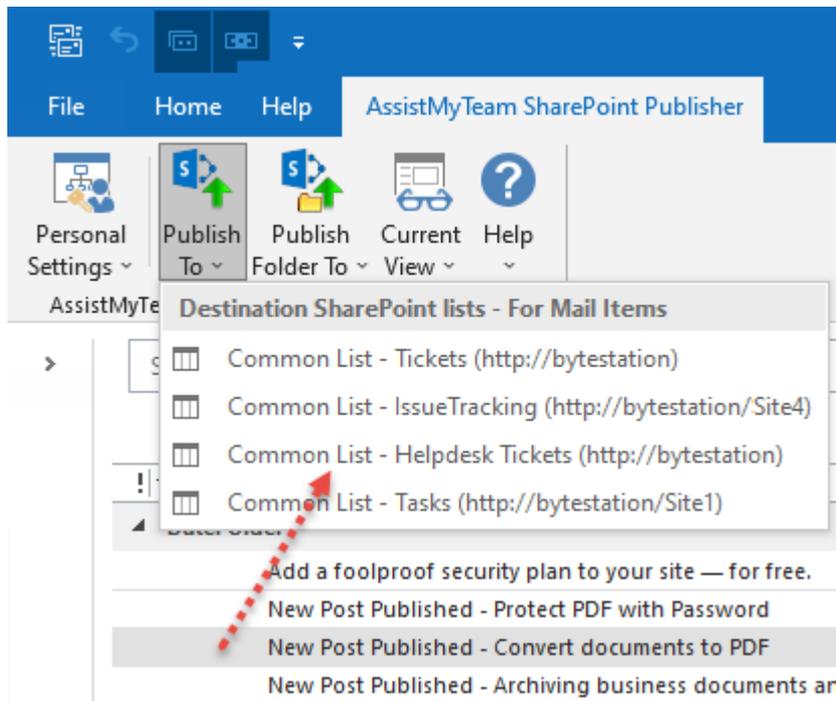

Additionally, it can monitor your mail folders for incoming mails, and synchronize and publish to a SharePoint list automatically as the mails arrive. This linkage and data adaptation from Outlook to SharePoint provides a unique solution for a convenient and controlled email and content management in the organizations.

AssistMyTeam SharePoint Publisher Add-in can be adapted and used for variety of content management purposes in SharePoint, such as:

- For filing trouble tickets to an issue tracking SharePoint list from Outlook emails.
- For submitting personal timesheets from Outlook calendar on work done, to a SharePoint calendar list.
- For submitting meetings and schedules from Outlook calendar to a SharePoint Calendar list
- For publishing attachments and emails (as .msg) on document libraries.
- For email retention and archival purpose in SharePoint.

Highlights

- Seamless integration with Microsoft Outlook and SharePoint.
- Support publishing of pre-defined Outlook fields, custom fields defined for that folder, as well as notes (Plain or HTML Body).
- Define and map as many SharePoint lists common to all Outlook folders, or specific to each Outlook folder.
- Choose any customized form defined for that Outlook folder.
- Centralized administration, configuration and deployment of SharePoint lists and field mappings for all workgroup users.
- Publish the whole contents of the Outlook folder to a SharePoint list in a single click.
- Publish all kind of Outlook items – mails, posts, appointments, tasks, journals or contacts.
- Real-time monitoring and automatic publishing of incoming emails/new items of an Outlook folder, to a SharePoint list.
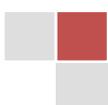
2. Requirements

AssistMyTeam Sharepoint Publisher is available right inside your Outlook as an add-in process. It can be easily deployed through an installer (manually or via a group policy object with MSI) across the entire organization. Please make sure that your systemmeets the following requirements before installing *SharePoint Publisher for Outlook*:

| Requirements	
Windows Version	Windows Vista or Windows 7, 8 and 8.1, 10, 11. Both 32-bit and 64-bit OS are supported.
Outlook Version	Classic Outlook 365, 2026, 2024, 2021, 2019, 2016, 2013, Outlook 2010 (both 32-bit and 64-bit). SharePoint Publisher operates directly inside the Microsoft Outlook application (using Microsoft COM add-in technology). Outlook Express and the 'New' Outlook is not supported.
SharePoint Version	WSS 2.0, 3.0, 4.0 (SharePoint 2010), MOSS 2007, 2010, 2012, 2016, 2019, Office 365
Others	Microsoft .NET Framework 4.8 or higher

.
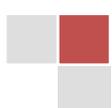
3. Installation

Before you can start publishing Outlook items to SharePoint, you need to install Data Publisher via the SetUp.exe. You can download it from **HERE**.

*Step by step procedure is given below:*

Step 1. Run the *SharePointPublisherSetup.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 also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install an Outlook add-in.
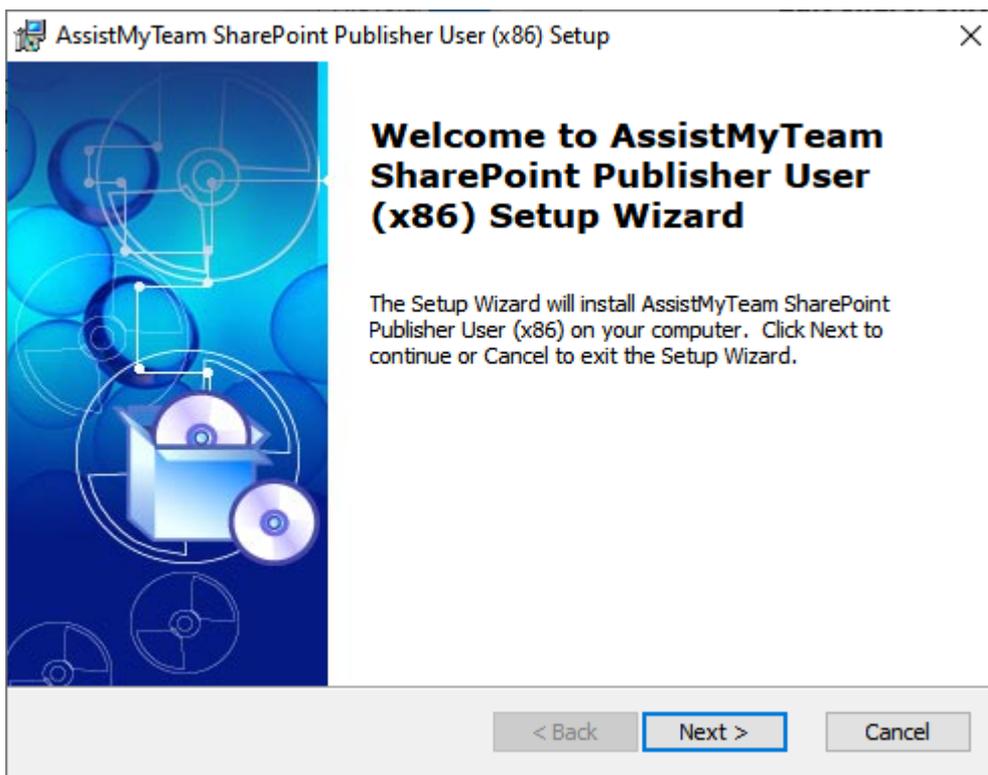

Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your program files folder)
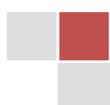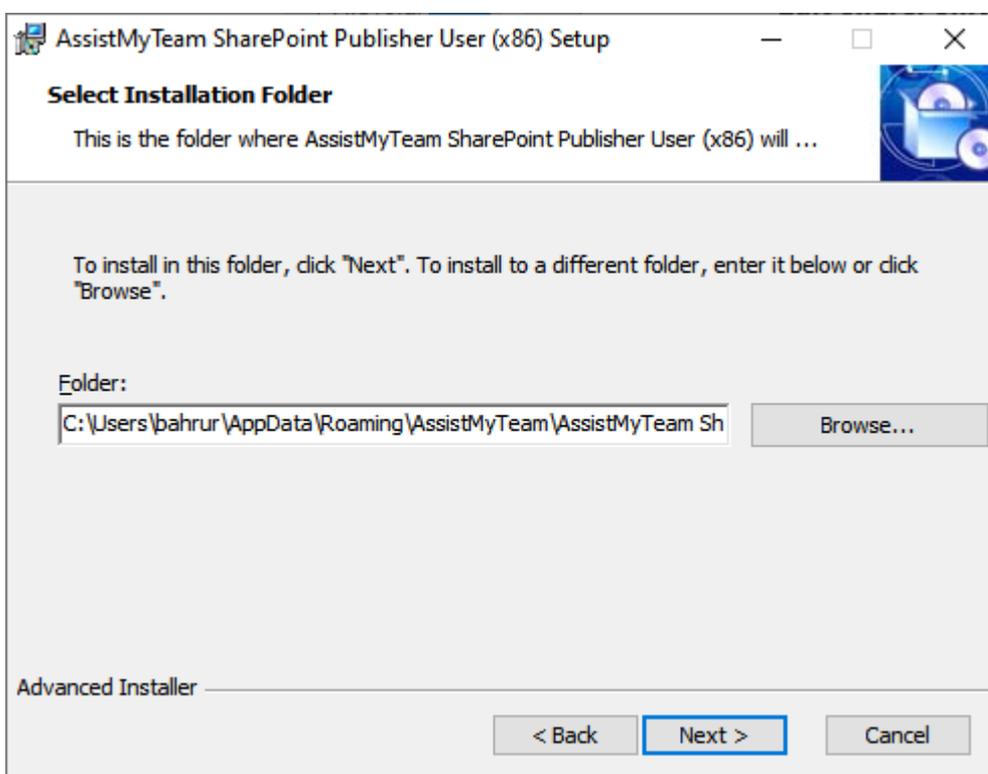
Step 3. Once you have verified the previous steps, click Next to continue the files extraction. It may take a few minutes to complete the whole copying process.
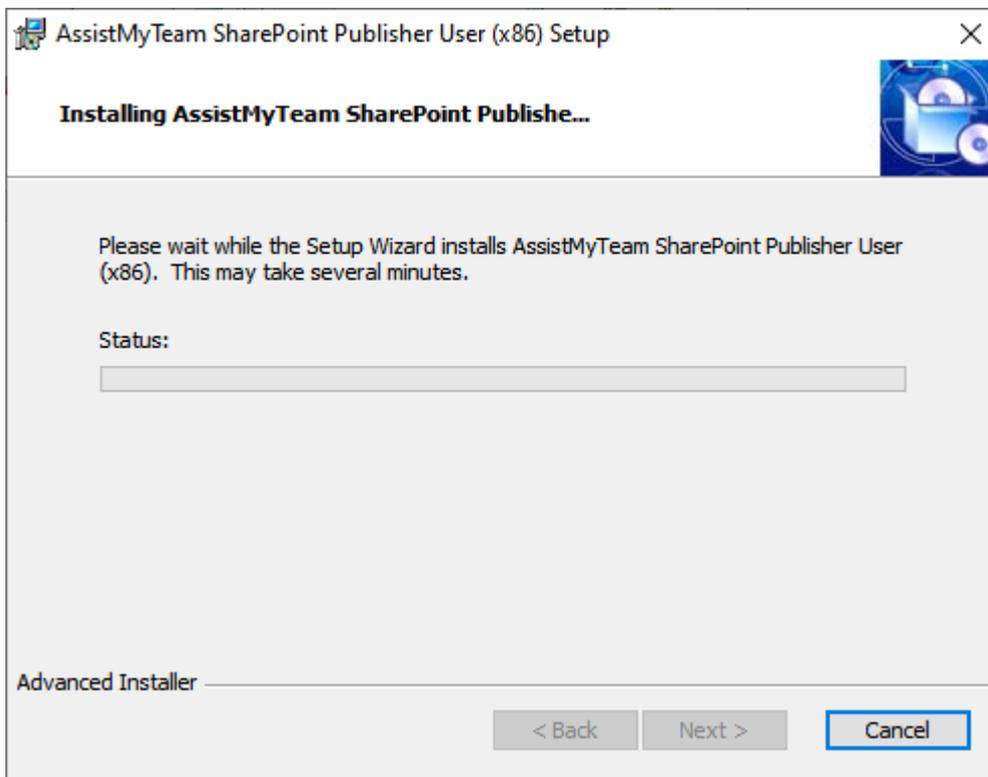
Step 4. Click **'Finish'** to proceed to the server configuration in Microsoft Outlook. This ends the files installation process in your system.
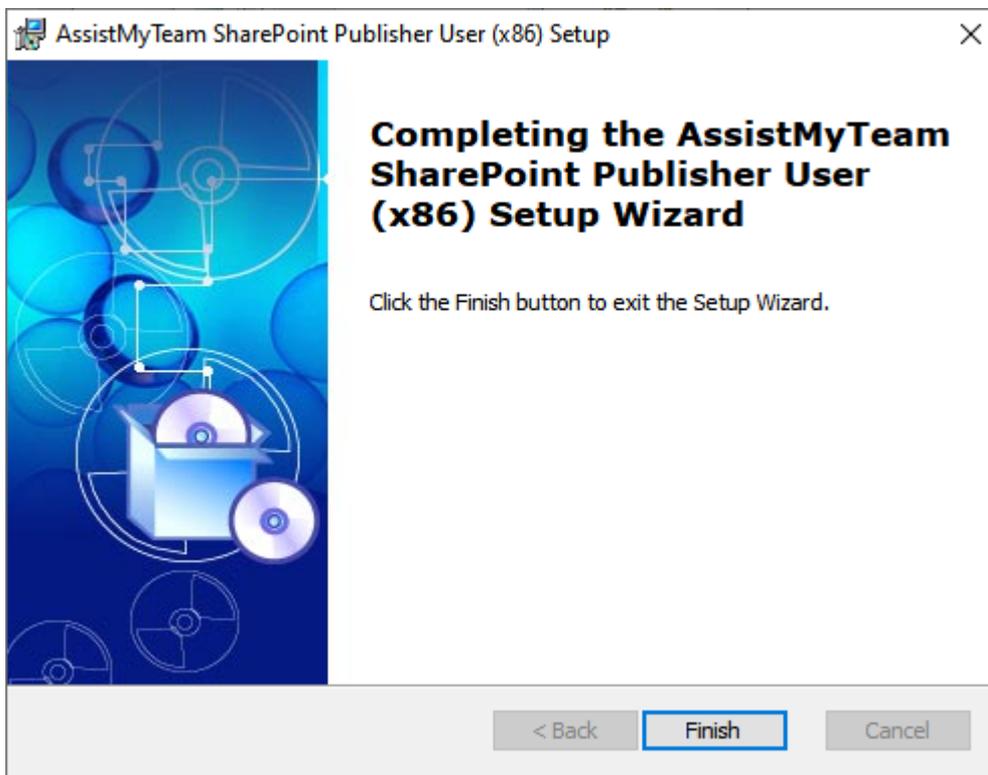

Now start Microsoft Outlook and you will see a dedicated tab with the title *'AssistMyTeam SharePoint Publisher'*.
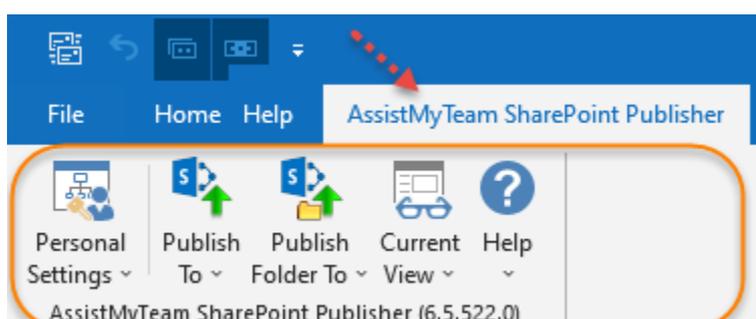
4. How does it work?

With the growing number of emails and enforced limits on mailbox sizes, today's organization needs an environment to effectively manage these information assets and apply the appropriate retention policies for emails containing company records. SharePoint is the ideal platform to facilitate this requirement, and no wonder, many organizations are adopting it to manage and share documents from a central location. Be it, emails, appointments, tasks or contacts, SharePoint facilitates storage, retrieval, search and collaboration on documents enterprise wide.
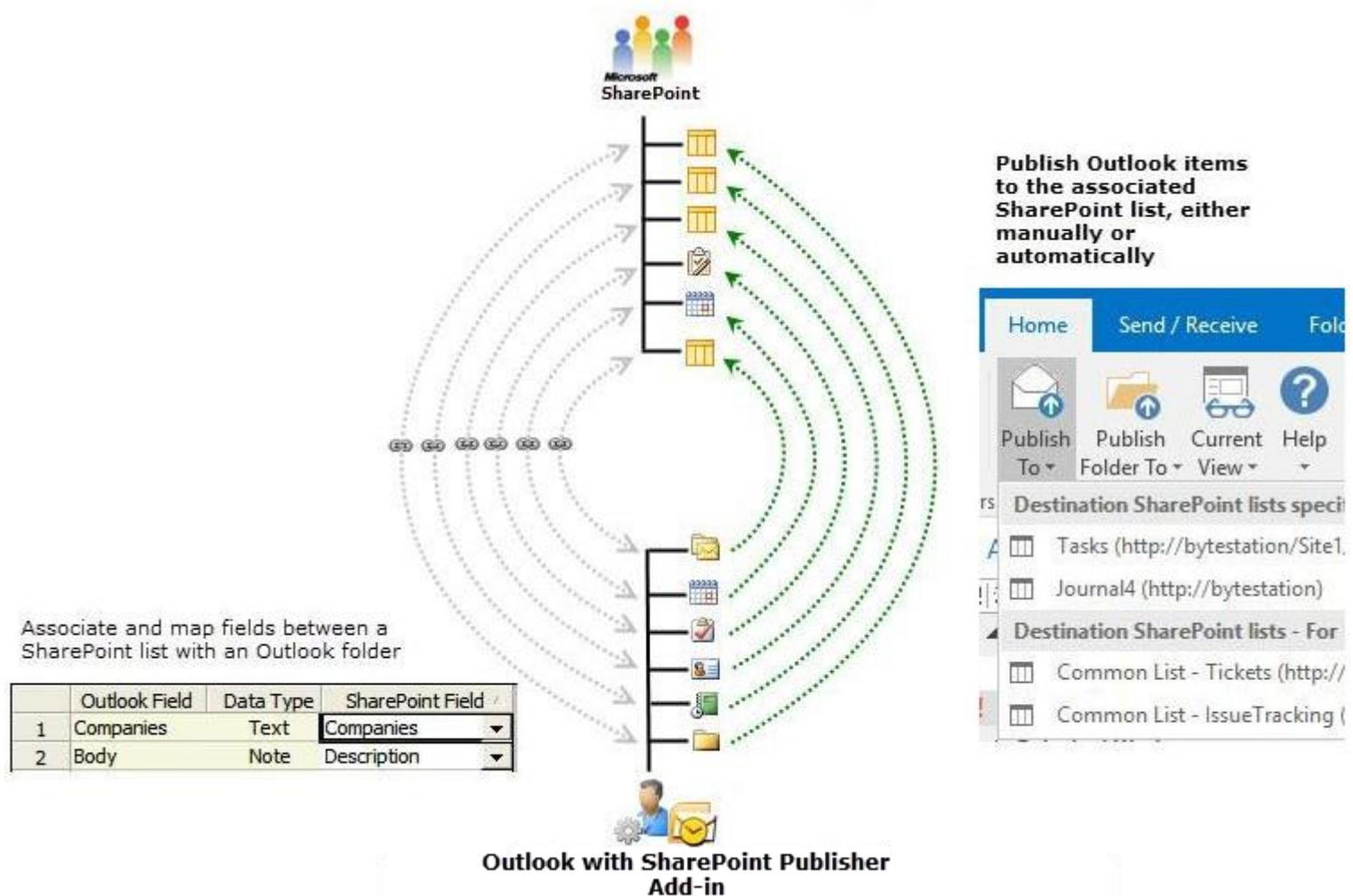
But the process of capturing and publishing of these contents from personal Inboxes and public folders has become a core issue for most organizations. Because, the inbuilt SharePoint integration in Outlook works on folder level, and does not support selective publishing of Outlook items. Moreover, it does not support or does not recognize most of the Outlook metadata (or fields), including those users defined ones. This inability to conveniently place data such as emails, appointments, tasks and contacts from Microsoft Outlook to SharePoint, is an issue being faced by many users today.

AssistMyTeam SharePoint Publisher overcomes this limitation by allowing user to map Outlook fields, including those defined by users to SharePoint list fields. With this arrangement, you can easily file and publish emails, attachments, appointments, tasks or contacts to SharePoint, without worrying for loss of metadata. Additionally, you can set Data Publisher to monitor any number of Outlook folders and mailboxes, such that, when an incoming email hits the mailbox, it would be automatically published to a configured SharePoint list. Streamlining these processes for a group of folders or for all Outlook folders bringsabout a bridging solution for content publishing and management from Microsoft Outlook to SharePoint.

## 5. Configuring SharePoint lists and mappings specific to an Outlook folder

Before you can start publishing Outlook items to SharePoint, you need to choose the destination SharePoint list, to which the captured metadata from Outlook will be stored as a list item. You will also need to define the mapping or association between the Outlook fields and the SharePoint fields.

The first step is to choose a SharePoint list, which will be used to store the published items from Outlook. You can define multiple SharePoint lists for each Outlook folder, or you can define common SharePoint lists that can be used for publication from any Outlook folder. Either way, you have complete control over which data goes to the SharePoint list from Outlook.

To configure a new SharePoint list and map fields with the particular Outlook folder, go to **Personal Settings menu > 'Configure SharePoint Lists for this folder'**.
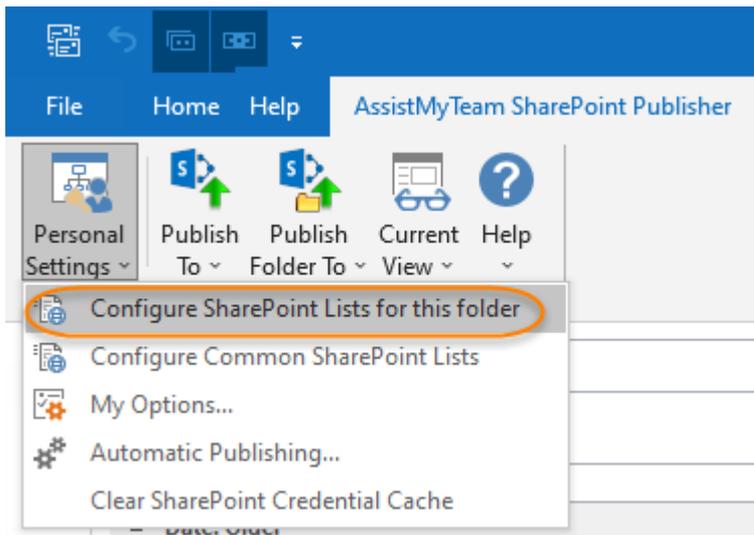
To configure a new SharePoint list and map fields with the particular Outlook folder, go to '**Personal Settings**' drop-down menu, and click the '**Specific to this Outlook Folder Only'** option.
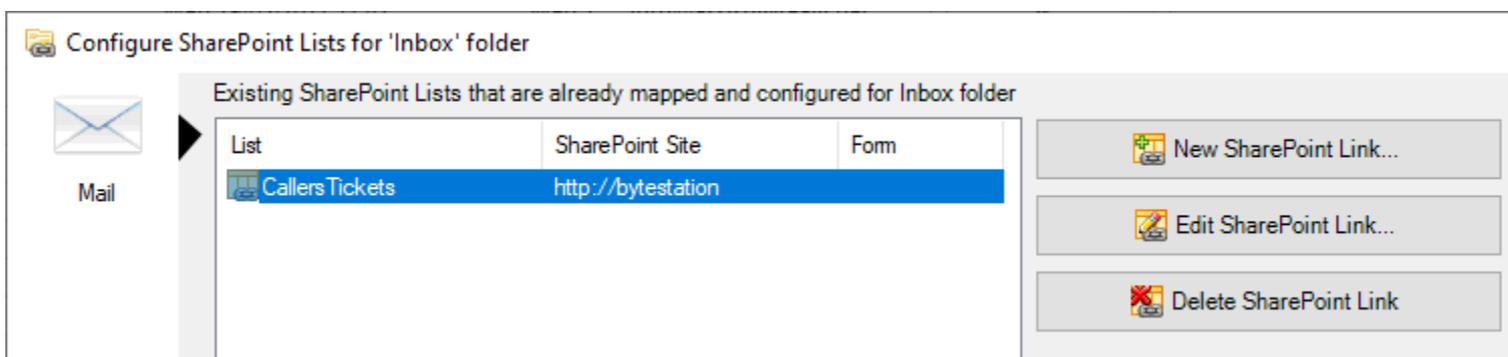

The Configurations Panel (above) shows all the configured SharePoint lists available for this particular Outlook folder. To re-configure mapping of an existing one, select the SharePoint link from the box, and click '**Edit SharePoint Link**' button.

To remove an existing SharePoint link, select the particular SharePoint list from the box and click '**Delete SharePoint Link**' button. This will remove the selected SharePoint link for the current folder. NOTE: The SharePoint list associated with this folder would not be deleted.

To configure a new SharePoint link and map fields to the particular Outlook folder, select '**New SharePoint Link**' button. This will prompt you to enter the SharePoint site URL to choose an existing SharePoint list.

You will then be prompted to enter the SharePoint site URL, and it would allow you to choose a SharePoint list or create a new one.
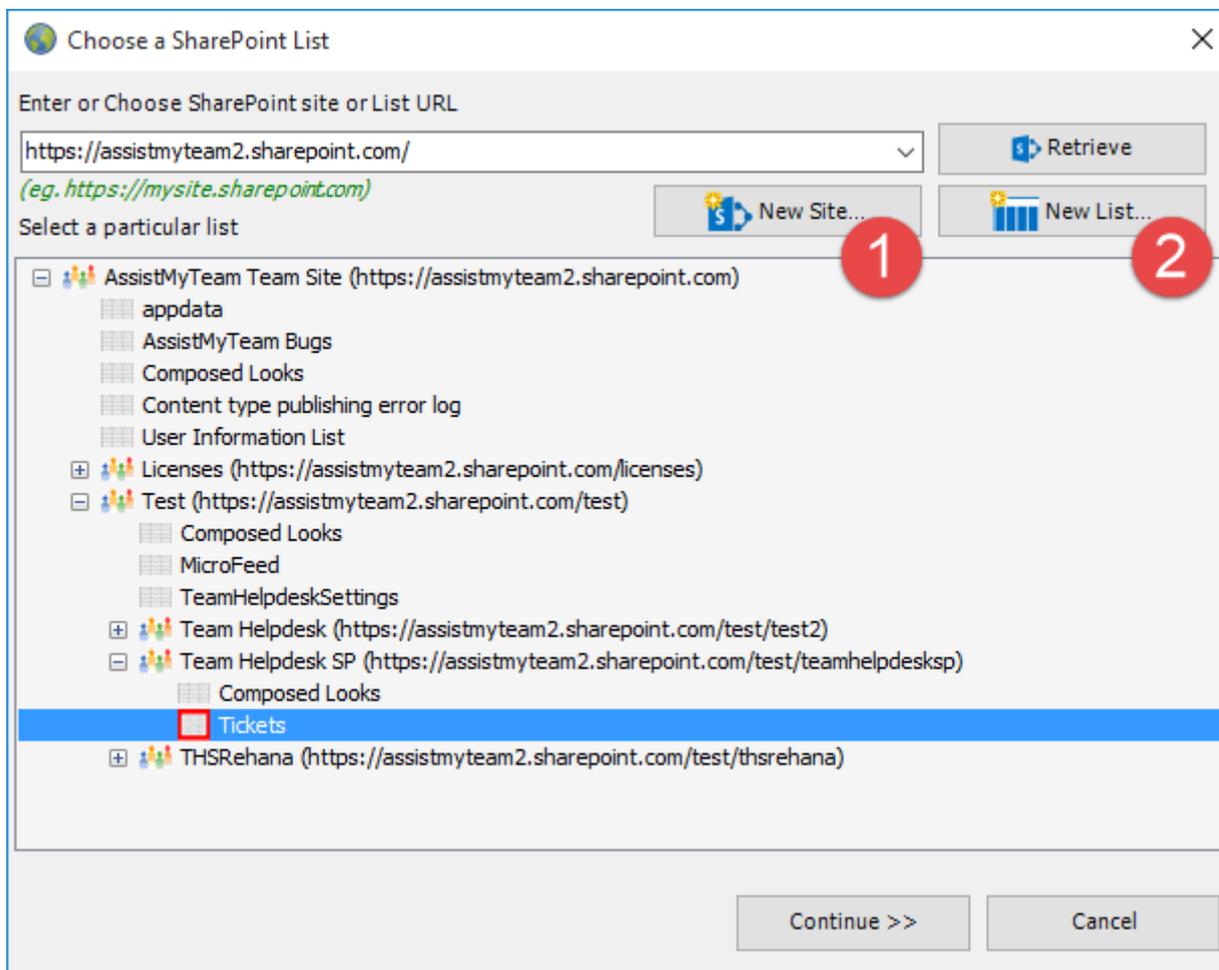
In the case of latter, you can choose to create – new site or list directly from the add-in. No need to go to your web browser.

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 to the corresponding Outlook field. For example, above, Outlook field *'Subject'* is mapped to SharePoint field *'Title'*.

By default, the first option **'Retrieve from the first item'** is selected, and what it does is, to probe the first item of the folder and automatically seek out all the available fields, including any number of user-defined custom fields. It is recommended that you

stick with this option of displaying the fields, unless, you want to retrieve Outlook specific fields only (second option), or want to use a particular custom form out of many defined for that Outlook folder (third option).

If you select the second option **'Default form'**, it will list all the inbuilt fields associated with the particular Outlook item type. *For example, Mail type.*

Likewise, if you select the third option **'Custom Form'**, it will list all the inbuilt fields, plus any user defined fields that were added by the user.

Let us consider the example of an Outlook folder that contains a custom form *'IPM.Post.AMTSupportCase'*. Assuming there are custom fields defined in that custom form, and there are hundreds of items in this folder that were generated using this custom form. So, if you want to include the custom data on these items when published to SharePoint, you can use the custom form to include and map the custom fields to the SharePoint fields. All you need to do is enter the custom form name *'AMTSupportCase'*.

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 also 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 SharePoint site.

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.

6. Configuring SharePoint lists and mappings common to all Outlook folders

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.
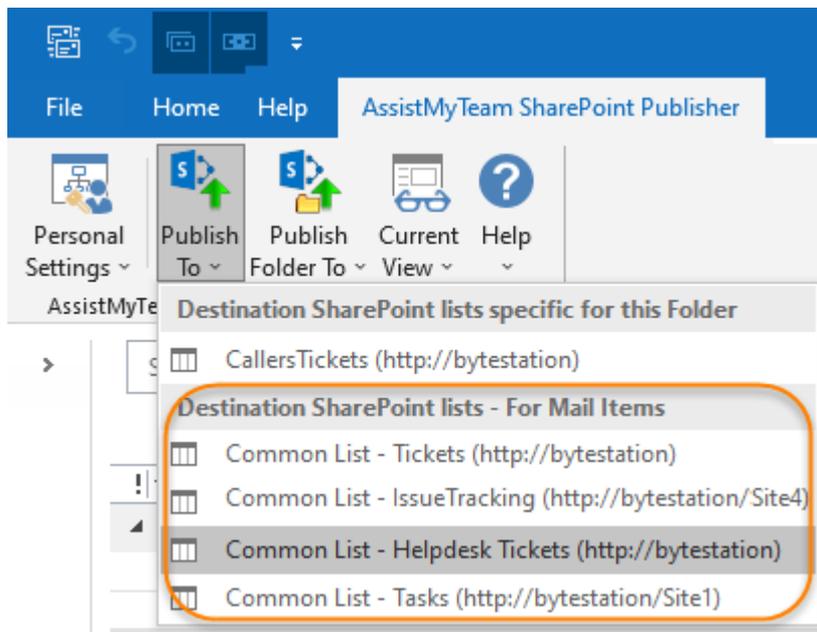
To define a common SharePoint list and mapping for all Outlook folders, go to **Personal Settings menu > 'Configure Common SharePoint lists'**, as illustrated on the below:
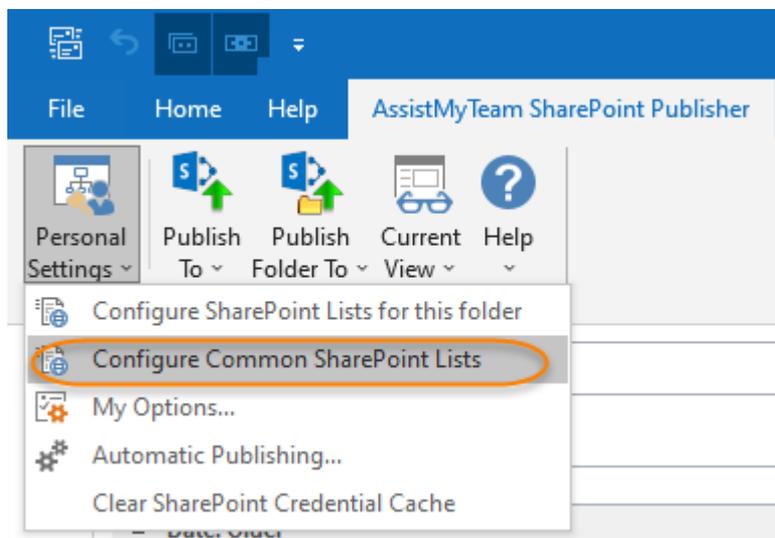
In this common SharePoint lists panel, you can choose for which particular type of Outlook item, will the configured SharePoint list and mapping be associated with. Type of items can be *mail, appointment, task, journal or contact.*
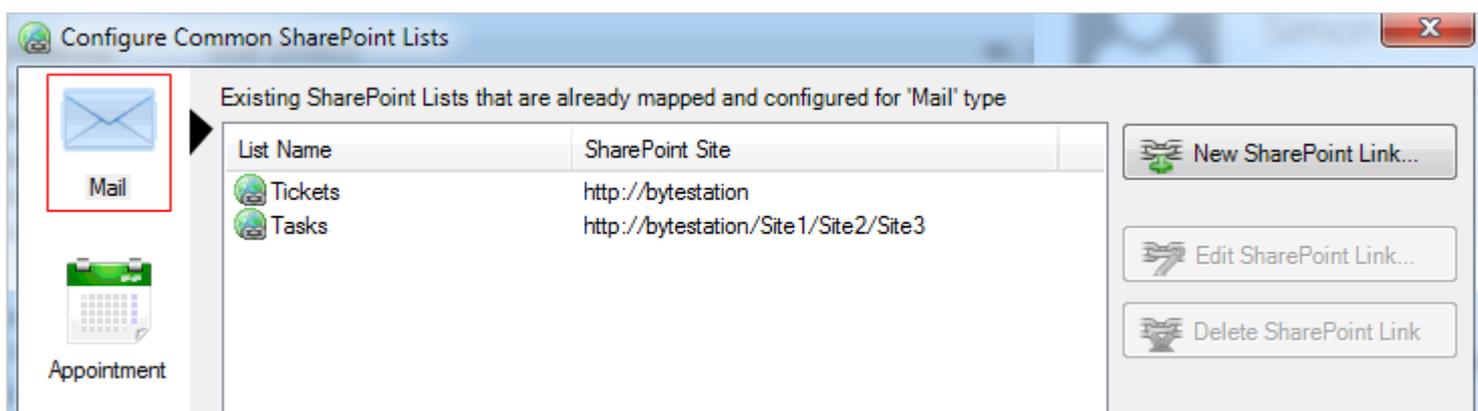
To link a SharePoint list to a particular Outlook item type, say 'Mail', click **'New SharePoint Link…'**. This will prompt you to enter the SharePoint site URL to choose an existing SharePoint list.

Likewise, you can specify SharePoint lists that will store published appointments from Outlook.
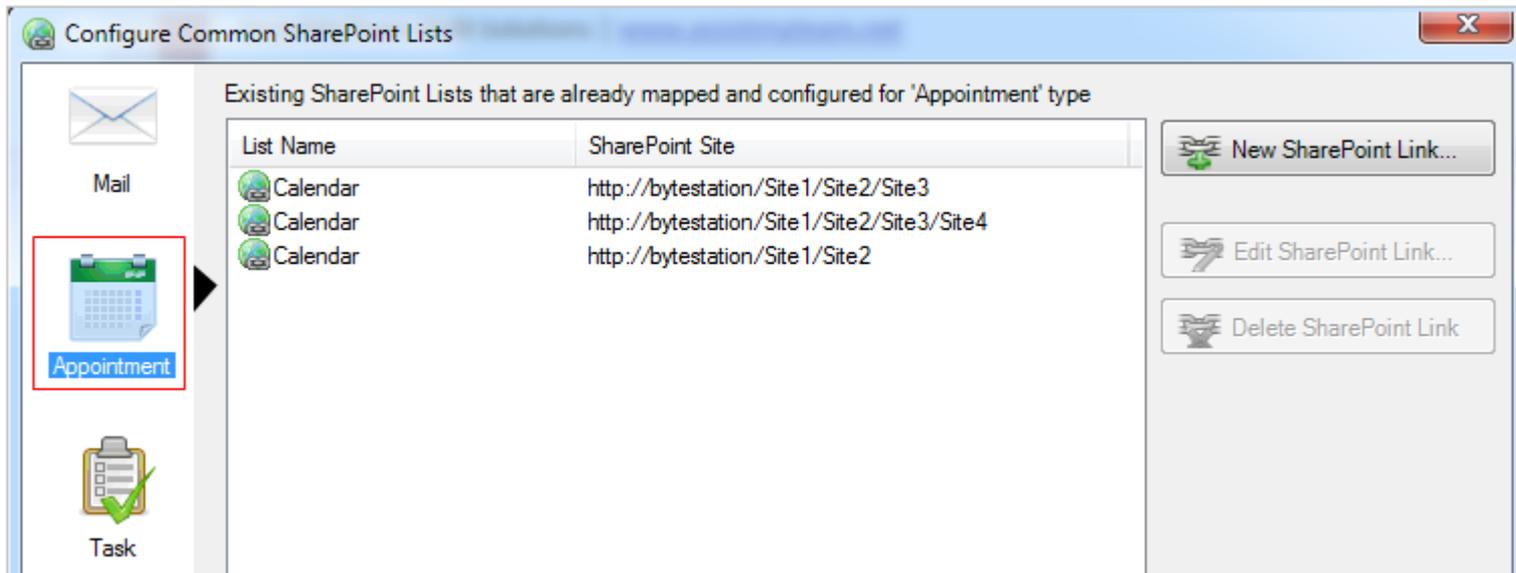
At any time, if you want to re-edit the mapping configuration of a linked SharePoint list, just select the list and click **'Edit SharePoint Link…'**.

To remove an existing field 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.*

If you have added multiple SharePoint lists in SharePoint Publisher add-in for a particular Outlook item type, you will notice that the **Publish To'** drop down menu shows all of them. You and other users can then simply choose the destination SharePoint list to which a new Outlook item will be published from the selected Outlook items.
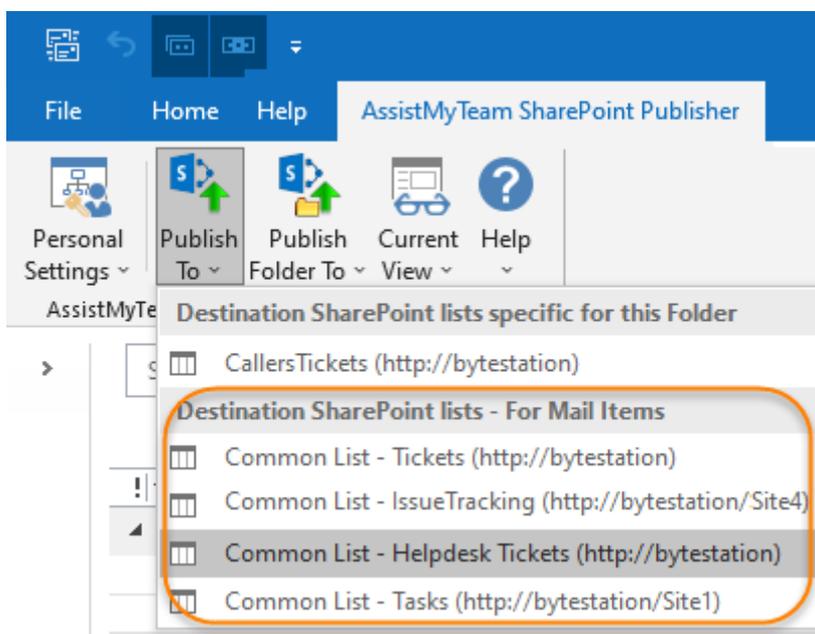
7. Publishing Outlook Items to SharePoint

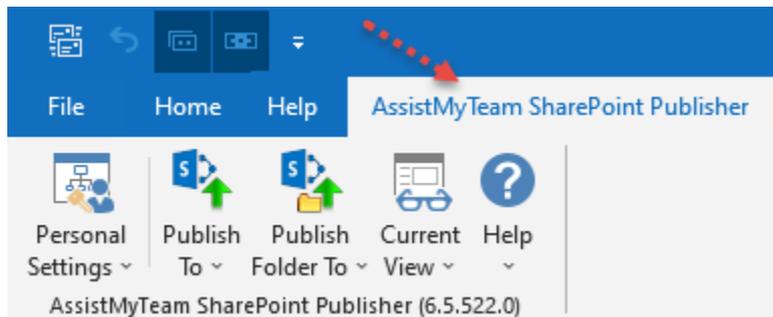When you navigate to any Outlook mail, appointment or contact, the SharePoint Publisher toolbar and ribbon are available in the Outlook explorer and inspector window.

SharePoint Publisher specific toolbar available as a dedicated tab in Outlook Explorer window.

SharePoint Publisher specific ribbon available as dedicated tab of the Outlook mail inspector window.
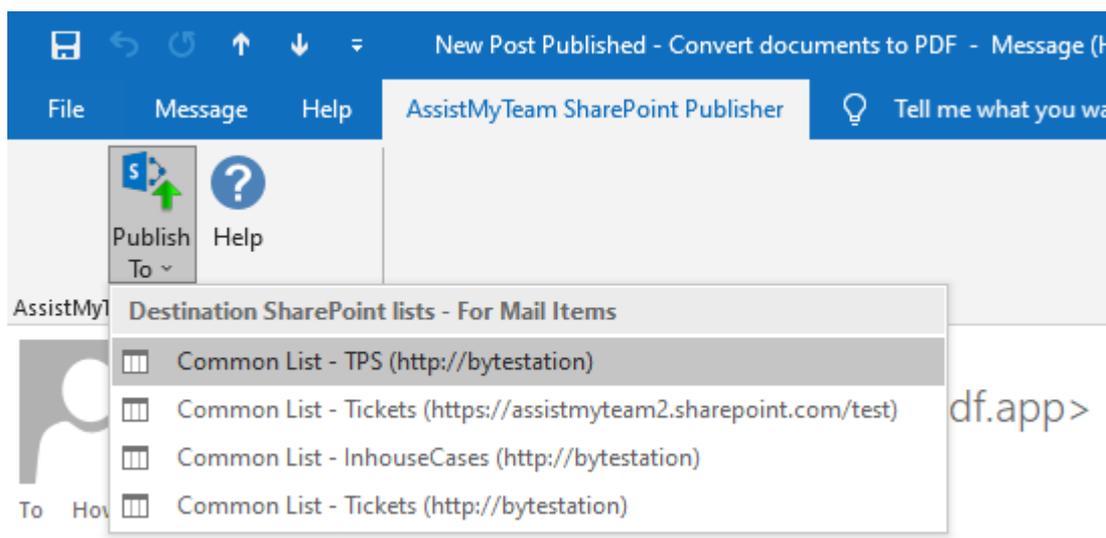
To publish an Outlook item to one of the administrators chosen SharePoint list, simply click the corresponding the SharePont list name from the **'Publish To'** drop down. When you do this, relevant metadata will be extracted from each of the selectedOutlook items, based on the fields mapping settings and exported to the SharePoint list of your choosing.
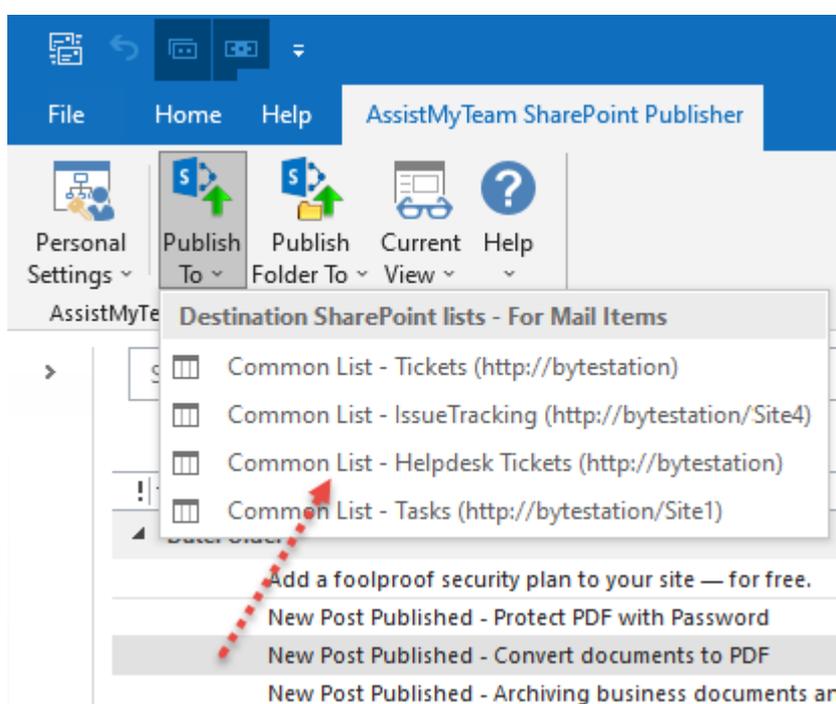
Once an Outlook item is successfully published, it will be tagged as being published internally in Outlook and will get an embedded hyper-link in the body field containing the ID of the published item of the SharePoint (*e.g., SharePoint URL #1*).
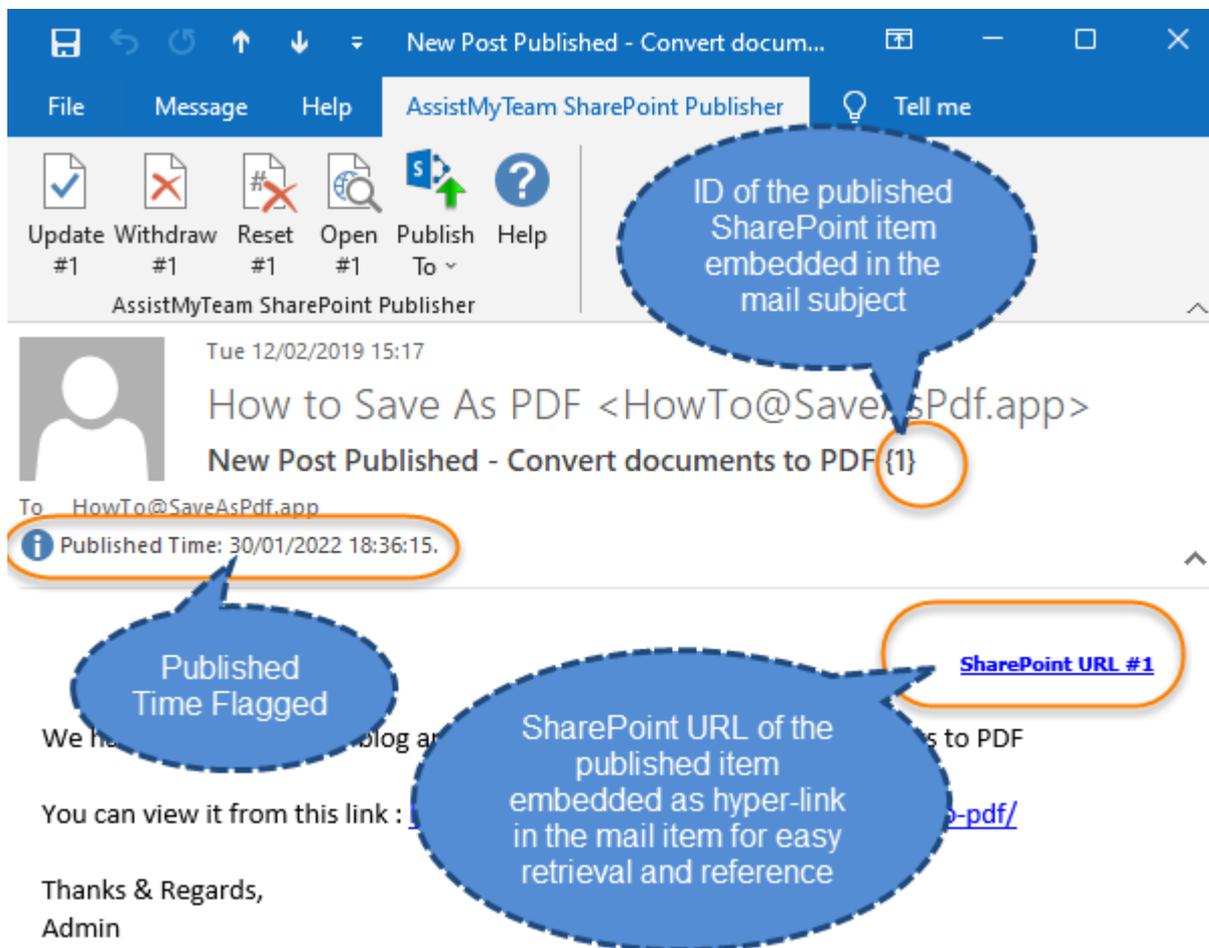
At any point, you can change the data in this particular Outlook item and re-publish it again to update the corresponding SharePoint item seamlessly.

Clicking this would open the particular SharePoint item in your default web browser.
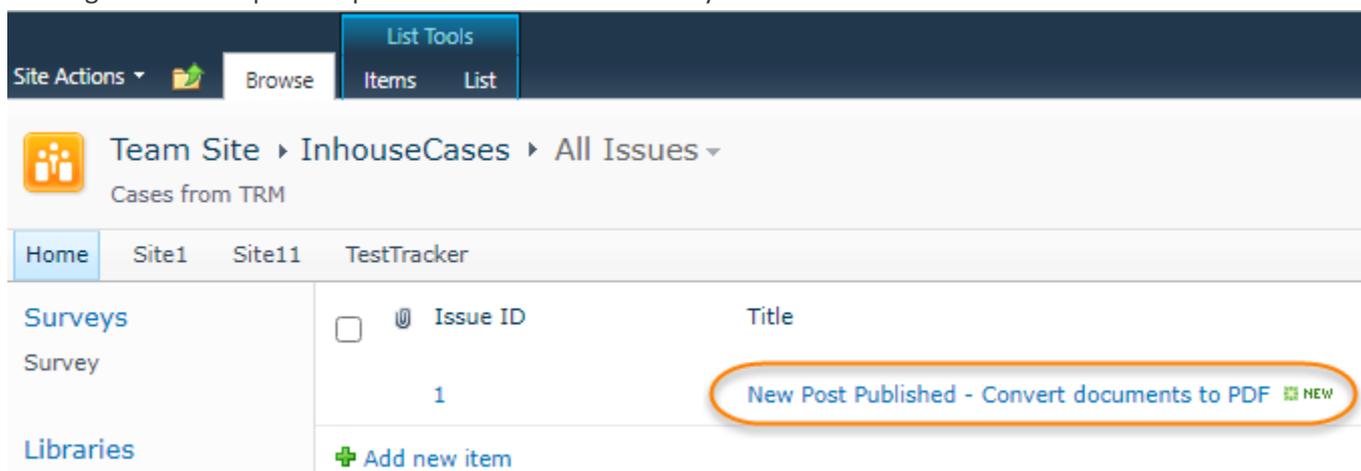
If you open the published SharePoint item in your web browser, you will see that the SharePoint fields are populated with the metadata information extracted from the corresponding Outlook item. You will also notice that, attachments, the formatting and style of the body field, the inline images and links are also retained in the SharePoint copy of the item.

This is how the published SharePoint item #1 looks like in your SharePoint site (mapped to the 'Mails' list)

Site Actions ▾　　Browse　　View

Edit Item

Version History
Manage Permissions
Delete Item

Manage

Alert Me

Actions

Title	New Post Published - Convert documents to PDF
Assigned To	
Issue Status	Active
Priority	(2) Normal
Description	We have published a new blog article on our website : Convert documents to PDF

You can view it from this link : https://saveaspdf.app/convert-documents-to-pdf/

Thanks & Regards,
Admin

You received this email because in the past you have provided us your email address : HowTo@SaveAsPdf.app to receive notifications when new updates are posted.

No longer interested in emails from How to Save As PDF? Please click here to unsubscribe. |
Category	(2) Category2
Related Issues	
Comments	No existing entries.
Due Date	
To	HowTo@SaveAsPdf.app
SenderName	How to Save As PDF
CC	
BCC	
SenderEmailAddress	HowTo@SaveAsPdf.app
ReceivedTime	2/12/2019 8:47 PM

8. Make Revision or withdraw published SharePoint items

Once you have published an Outlook item to an administrator chosen SharePoint list, the published item ID that was generated in the SharePoint list will be tagged to the particular Outlook item for reference. And you will then see additional buttons (*i.e., Update, Withdraw and Untag*) in the SharePoint Publisher toolbar or ribbon.
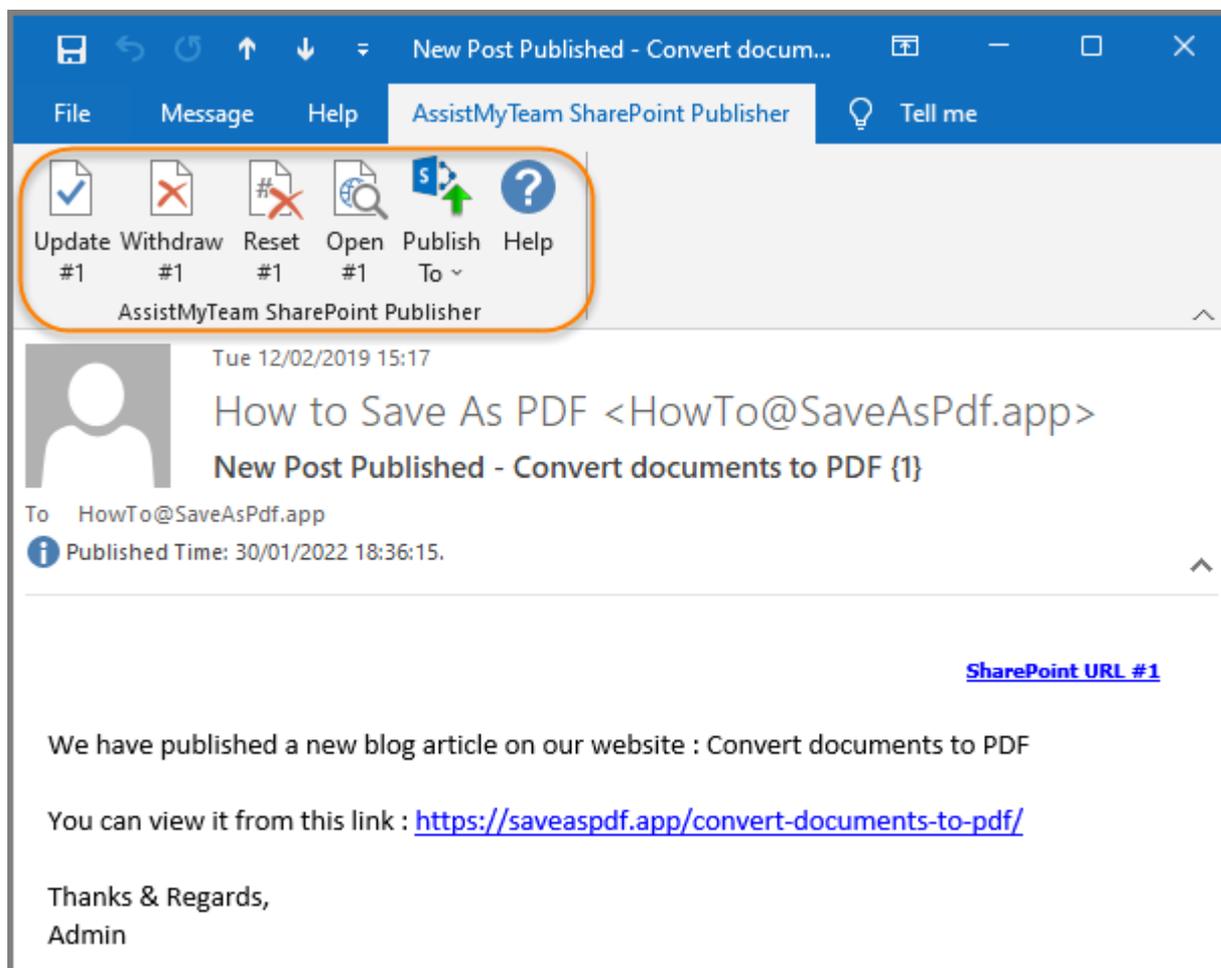
Note that, the functionality to make update and revision or withdraw published SharePoint item depends on the administrative settings. If the administrator had enabled it, individual member can make revision update or withdraw the published SharePoint item directly from the corresponding Outlook item.

You can use the '*Untag*' button to remove all references and links to the published SharePoint item from the Outlook item. This will reset the Outlook item, and you can then re-publish to a different SharePoint list.

9. Publish whole contents of an Outlook folder

If you wish to publish the whole contents of an Outlook folder to SharePoint, you can do so from the *SharePoint Publisher toolbar > Publish Folder To*. All you need to do is, specify a particular SharePoint list.
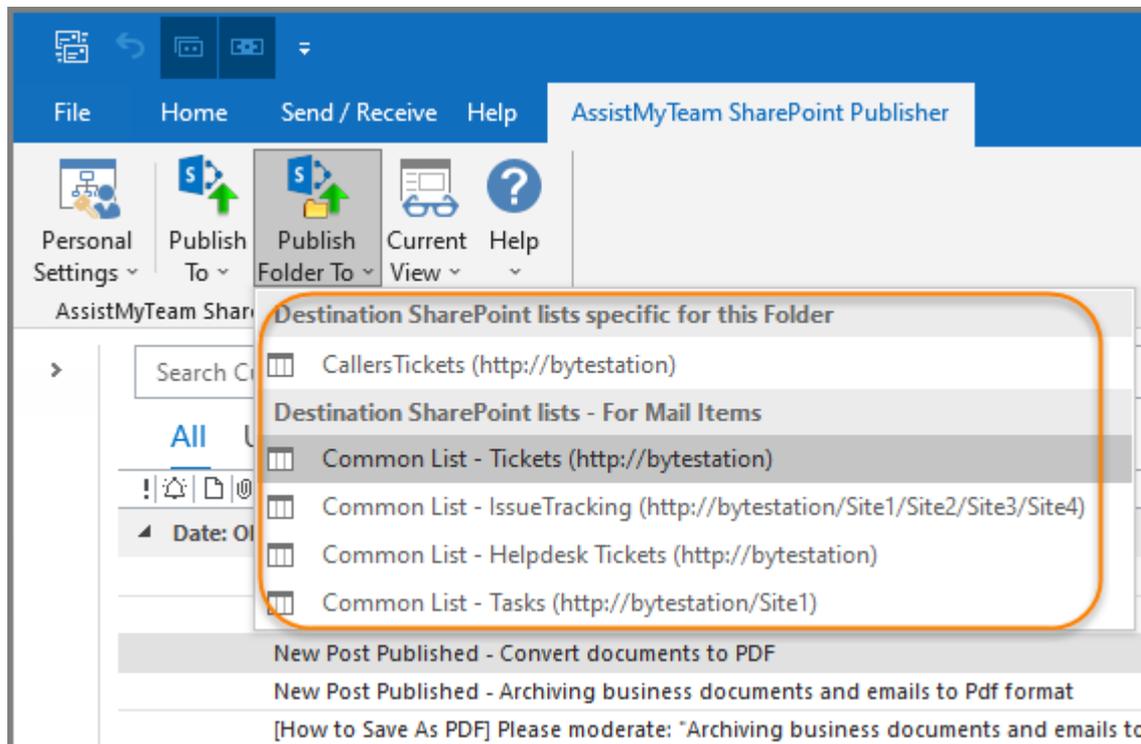
Doing so, all the items in the current Outlook folder would be processed in batch and publish to the specified SharePoint list. You can monitor the progress of the batch publishing process with the dialog below. You can press 'Cancel' to stop and interrupt the publishing.
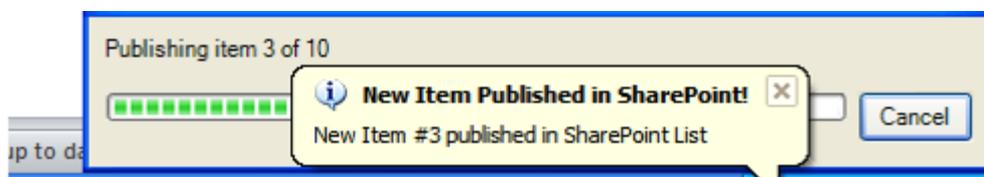
Once all the items from the current folder are published successfully to the specified SharePoint list, it will open the SharePoint list in a web browser.
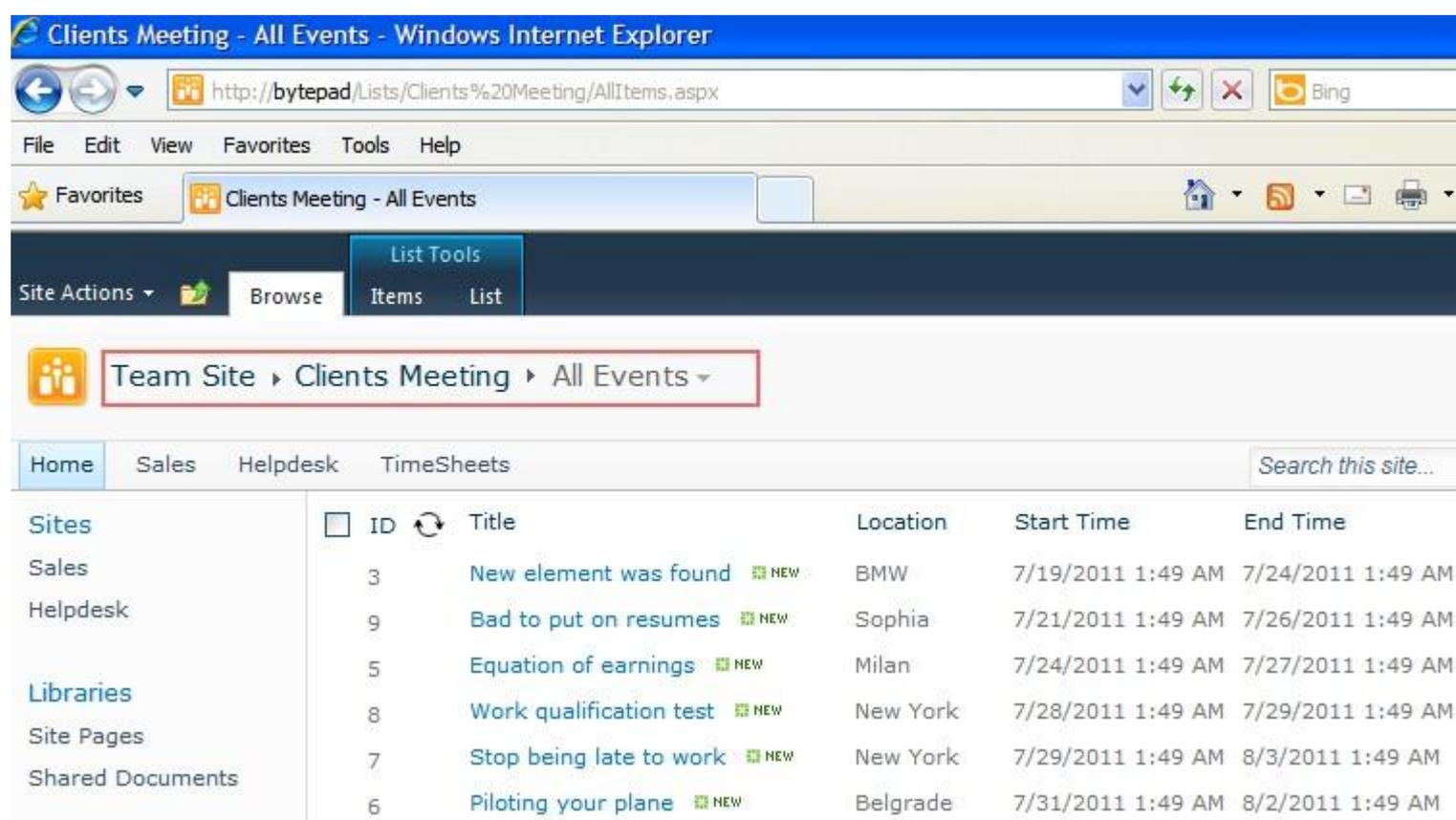
10. Automatic publishing of Outlook items to SharePoint

SharePoint Publisher supports real-time monitoring of any number of Outlook folders, to automatically publish incoming mails or newly added appointments, tasks or contact items to a SharePoint list of your choosing, without requiring your intervention. Such automation comes very handy and useful, in maintaining a parallel copy or backup of your current Outlook items in SharePoint. This spares you from having to do that laborious work of copying and pasting the data from Outlook to SharePointmanually.
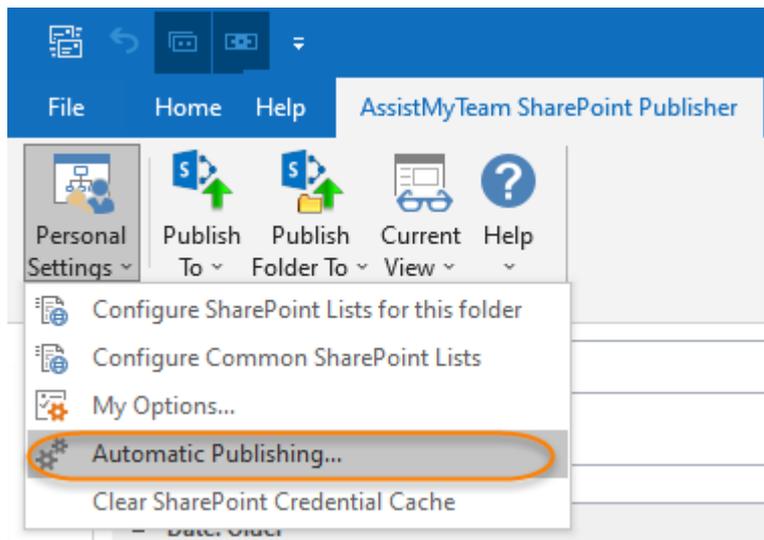
To configure the Automatic Publishing feature, go to **'Personal Settings'** menu, and click **'Automatic Publishing'** option.

This Configuration Panel shows all the monitored Outlook folders. You can monitor any number of Outlook folders, either public folders or shared mailbox folders.
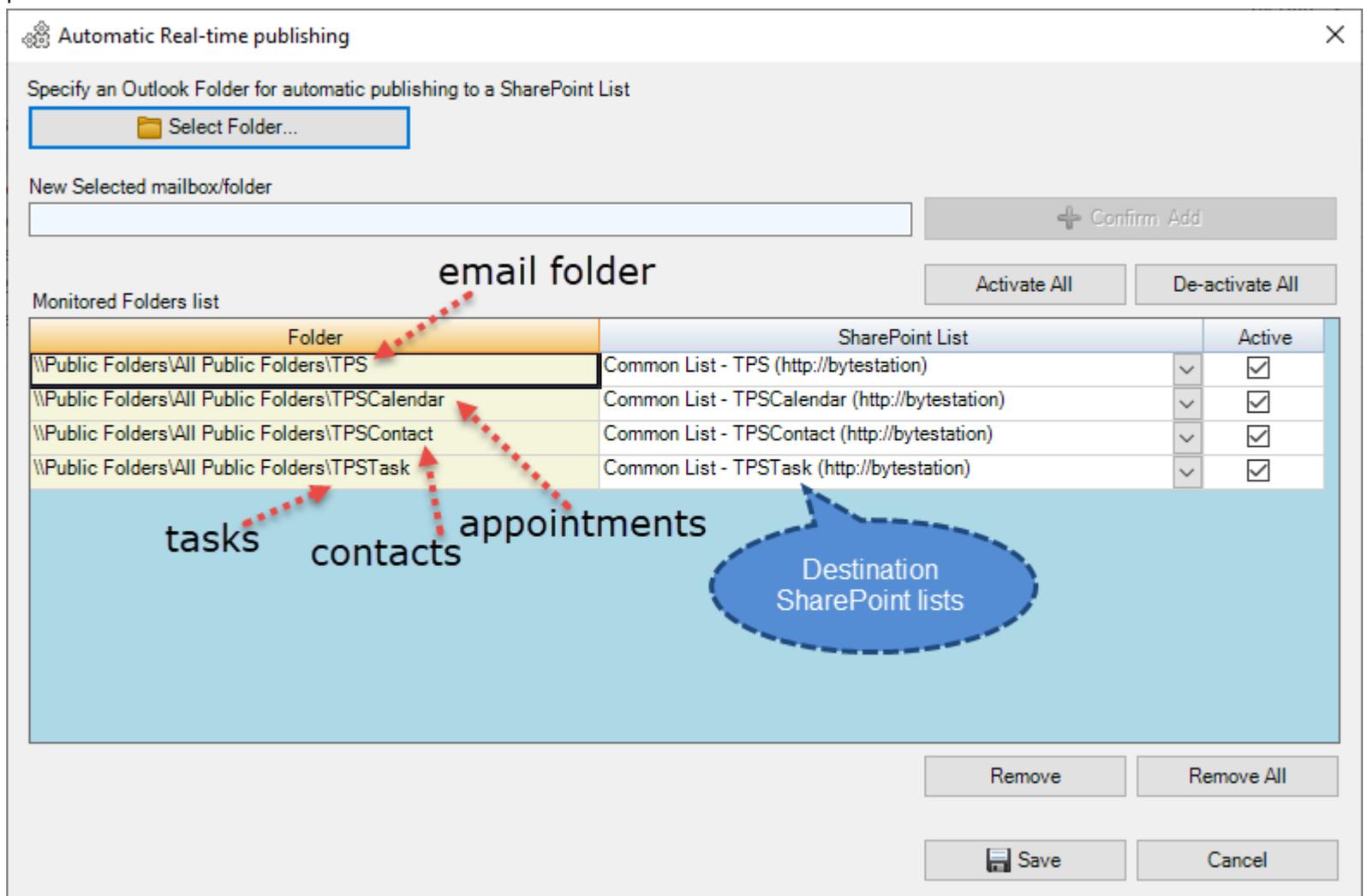
To monitor a new Outlook folder, press the 'Select Folder...' button and choose the desired Outlook folder from the prompt dialog. And then click the button 'Confirm & Add' to add in the monitored lists grid. You can then select to which SharePoint list you like the Outlook items of this folder to publish automatically. You can also deactivate or activate the automatic publishing from the monitored folder with the 'Active' checkbox.

11. Work with Outlook Views

Outlook views are a wonderful tool to automatically sort, quickly find information andrapidly re-arrange Outlook items in any folder. Views can also be organized to group and filteritems to make a particular feature of your information obvious at first glance.

In every Outlook folder or calendar or contact, SharePoint Publisher automatically adds four (4) special Outlook views to help organize, sort and track Outlook items in a simpler and sensible way. Theseviews can be accessed through the '**Current Views**' drop-down menu, available in the SharePoint Publisher toolbar or ribbon.
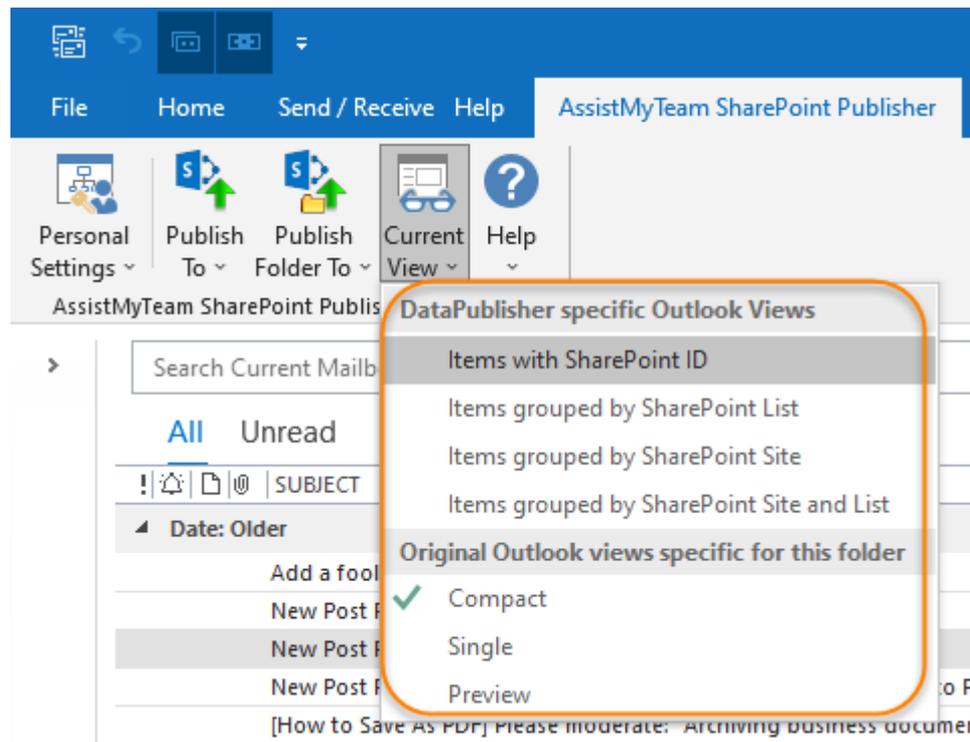
View 1 – Items with SharePoint ID

This a table view, where the Outlook items are arranged by the unique item 'ID' of the published SharePoint list item in descending order. The SharePoint List Name and Site Name are also available in the view.

View 2 – Items grouped by SharePoint list

This is a table view, where all the Outlook items are grouped by the Published SharePoint List name. Along with the list name, you will see the sub total number of items in that group under the bracket.

ID	! ⌂ ▯ ⑩	From	Subject	Site	Received ▼
◢ List Name: Issue Tracking (3 items)					
55	✉	Becca	I broke it.	http://bytepad/H...	Sat 2/12/2011 3:56 AM
54	✉	Hanke-Gyßling, T...	AW: Question Team Helpdesk for O...	http://bytepad/H...	Fri 2/11/2011 8:02 PM
53	✉	Bob Clift	Attachment Manager	http://bytepad/H...	Wed 7/28/2010 8:16 PM
◢ List Name: Mails (1 item)					
60	✉⑩	Lisa Bub	Submit Button & TWA Issues	http://bytepad/H...	Sat 2/12/2011 6:28 AM
◢ List Name: Sales 2011 (4 items)					
5	✉	Sharon Elmes	Invoice Details Required	http://bytepad/S...	Tue 7/27/2010 2:07 PM
4	✉	Ben Nel	RE: Outlook database exporter	http://bytepad/S...	Mon 7/26/2010 4:37 PM
3	✉	Andrew Wheelho...	Screen shot	http://bytepad/S...	Tue 7/6/2010 11:55 PM

View 3 – Items grouped by SharePoint Site

This is a table view where the Outlook items are grouped by the published SharePoint site URL.

ID	! ⌂ ▯ ⑩	From	Subject	List Name	Received ▼
◢ Site: http://bytepad/Helpdesk (4 items)					
60	✉⑩	Lisa Bub	Submit Button & TWA Issues	Mails	Sat 2/12/2011 6:28 AM
55	✉	Becca	I broke it.	Issue Tracking	Sat 2/12/2011 3:56 AM
54	✉	Hanke-Gyßling, T...	AW: Question Team Helpdesk for Outlook	Issue Tracking	Fri 2/11/2011 8:02 PM
53	✉	Bob Clift	Attachment Manager	Issue Tracking	Wed 7/28/2010 8:16 PM
◢ Site: http://bytepad/Sales (7 items)					
5	✉	Sharon Elmes	Invoice Details Required	Sales 2011	Tue 7/27/2010 2:07 PM
4	✉	Ben Nel	RE: Outlook database exporter	Sales 2011	Mon 7/26/2010 4:37 PM
3	✉	Andrew Wheelho...	Screen shot	Sales 2011	Tue 7/6/2010 11:55 PM
2	✉	info@assistmytea...	New Enquiry Submitted from Contact Page	Sales 2011	Tue 6/29/2010 10:18 PM
3	❗ ✉	Lynn Nuckols	Document Exporter	Tasks	Fri 6/25/2010 1:58 AM
2	✉	Dan Tang	Fw: New Support Request: SupportCalls ...	Tasks	Wed 6/23/2010 11:54 PM
1	✉	Upload.com	How will you get ahead?	Tasks	Wed 6/23/2010 5:00 AM

View 4 – Items grouped by SharePoint Site and List

This is a table view, where all the Outlook items are first grouped by the published SharePoint Site URL, and then further sub-grouped by the published SharePoint List name. This gives you a hierarchy tree representation of all Outlook organized and summarized in a better way.

ID	! ⌂ ▯ ⑩	From	Subject	Received ▼
◢ Site: http://bytepad/Helpdesk (4 items)				
▷ List Name: Issue Tracking (3 items)				
▷ List Name: Mails (1 item)				
◢ Site: http://bytepad/Sales (7 items)				
◢ List Name: Sales 2011 (4 items)				
5	✉	Sharon Elmes	Invoice Details Required	Tue 7/27/2010 2:07 PM
4	✉	Ben Nel	RE: Outlook database exporter	Mon 7/26/2010 4:37 PM
3	✉	Andrew Wheelhouse	Screen shot	Tue 7/6/2010 11:55 PM
2	✉	info@assistmyteam.n...	New Enquiry Submitted from Contact Page	Tue 6/29/2010 10:18 PM
◢ List Name: Tasks (3 items)				
3	❗ ✉	Lynn Nuckols	Document Exporter	Fri 6/25/2010 1:58 AM
2	✉	Dan Tang	Fw: New Support Request: SupportCalls with Ou...	Wed 6/23/2010 11:54 PM
1	✉	Upload.com	How will you get ahead?	Wed 6/23/2010 5:00 AM

12. Uninstalling SharePoint Publisher

To uninstall the SharePoint Publisher from your computer, follow the steps outlined below:

Step 1: Go to 'Control Panel > Programs and Features'. Scroll down to select 'AssistMyTeam SharePoint Publisher for Outlook' and click 'Uninstall' as illustrated below:

Step 2: A dialog confirmation follows asking for confirmation. Click Yes.

Step 3: The SharePoint Publisher setup will now start the un-installation process. Make sure that Microsoft Outlook is not running(even under the task manager). You can click 'Cancel' to exit the current setup.

13. Important Links

AssistMyTeam SharePoint Publisher for Outlook - Home page
Go to the official website of AssistMyTeam SharePoint Publisher for Outlook.

Support Maintenance contract
At AssistMyTeam, we're committed to give you the best support for all the products that we offer and more! The AssistMyteam Support Contract helps you use our products more efficiently and work out any issues that you encounter during the course of their use.

Submit an online support ticket
Use this web form to create a ticket with AssistMyTeam Technical Support.