

V6

AssistMyTeam

# SharePoint Publisher

For Outlook

An add-in for Microsoft® Outlook® that makes it very easy and effortless for workgroup users to publish their mails, appointments, tasks or contacts from Outlook to Microsoft® SharePoint®.

# Help Manual



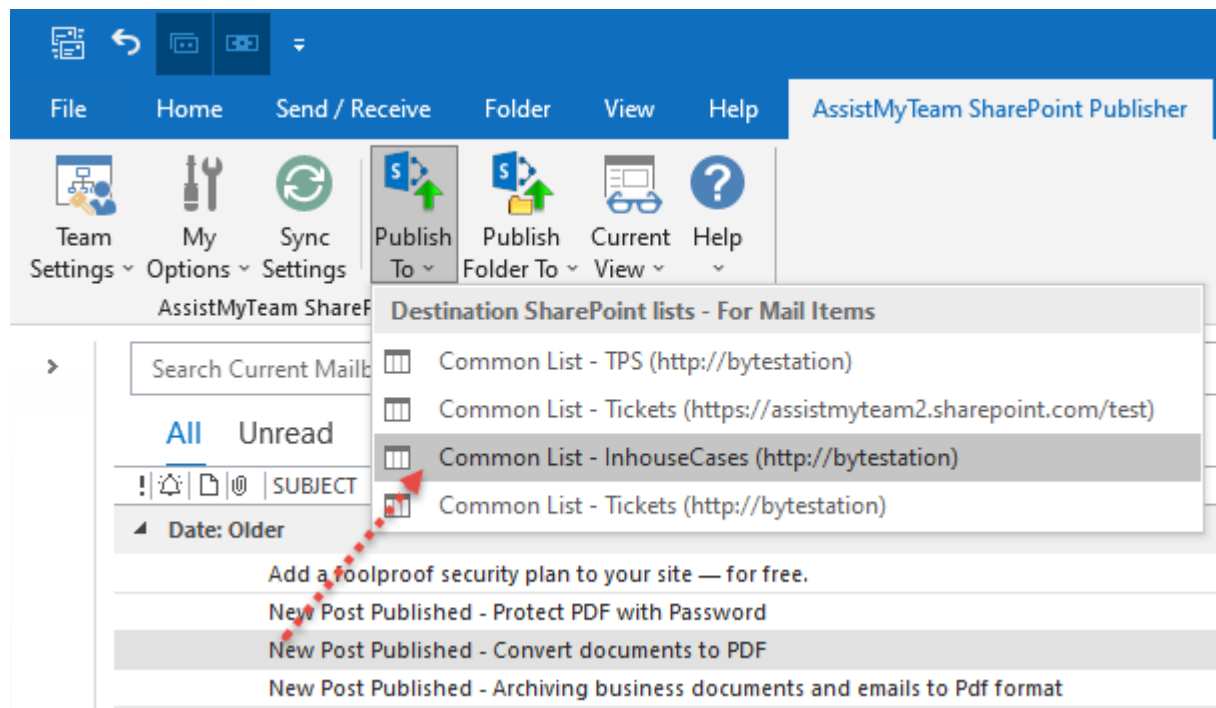
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## 1. Introduction

AssistMyTeam SharePoint Publisher provides an easy way for workgroup users to bring Outlook contents to SharePoint. It is just a click way to publish mails, appointments, tasks, journals or contacts from Outlook and share with other users in SharePoint, providing a seamless user experience. To be even more productive, individual user can set SharePoint Publisher to monitor their 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 for the entire team provides a unique solution for a convenient and controlled email and content management in the organizations.*



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

- ✓ Filing trouble tickets to an issue tracking SharePoint list from Outlook emails.
- ✓ Submitting personal timesheets from Outlook calendar on work done, to a SharePoint calendar list.
- ✓ Submitting meetings and schedules from Outlook calendar to a SharePoint Calendar list
- ✓ Publishing attachments and emails (as .msg) on document libraries
- ✓ 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 system meets the following requirements before installing *SharePoint Publisher for Outlook*:

### Requirements

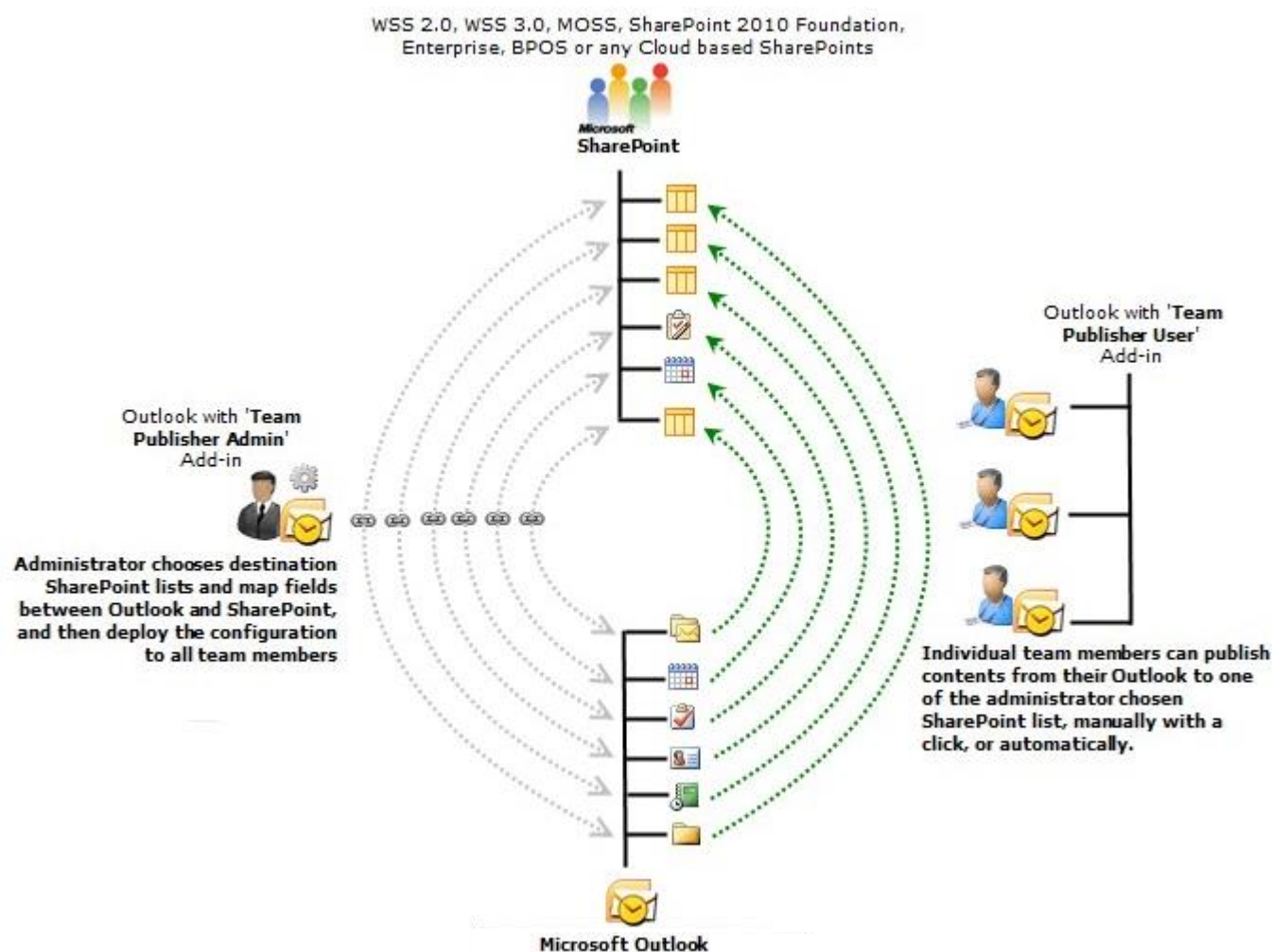
<b>Windows Version</b>	Windows Vista or Windows 7, 8 and 8.1, 10, 11. Both 32-bit and 64-bit OS are supported.
<b>Outlook Version</b>	Outlook 365, 2021, 2019, 2016, 2013, Outlook 2010 (both 32 bit and 64 bit). SharePoint Publisher operates directly inside the Microsoft Outlook application (using Microsoft's "COM add-in" technology). Outlook Express is not supported.
<b>SharePoint Version</b>	WSS 2.0, 3.0, 4.0 (SharePoint 2010), MOSS 2007, 2010, 2012, 2016, 2019, Office 365
<b>Others</b>	Microsoft .NET Framework 4.5



### 3. 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. As of now, SharePoint integration in Microsoft Outlook is limited to bringing the content of a SharePoint list offline in Outlook, and syncing any changes made to those items made in Outlook back to the particular SharePoint list. There is no direct provision or support for exporting or syncing your existing personal Outlook items such as emails, appointments or tasks to a SharePoint list. And even if you find a way (for example, with scripts or third-party applications), you will often find that it does not support or does not recognize most of the Outlook metadata (or fields), including custom fields. 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 the administrator to specify any number of SharePoint lists where the published items from Outlook will be stored, followed by mapping Outlook fields to SharePoint fields. 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).

Administrator can then deploy the configuration and mapping settings to the entire organization, allowing workgroup users to easily file and publish emails, attachments, appointments, tasks or contacts to the administrator's specified SharePoint list and fields. Streamlining these processes for all users of the organization brings about a bridging solution for content publishing and management from Microsoft Outlook to SharePoint.

## 4. Installation

AssistMyTeam SharePoint Publisher for Outlook is a groupware solution consisting of two portions – Admin and User install.

- **Admin install** is for managers and administrators who would choose and setup SharePoint lists, map fields between Outlook and SharePoint, configure publishing behaviors etc.
- **User install** is for individual team member and user who will be publishing their Outlook contents such as emails, appointments, tasks or contacts to one or more of the Administrator chosen SharePoint lists.

Before you and your other users can start publishing Outlook items to SharePoint, you need to install the Admin tool (for configuring a centralized configuration) and the user tool. You can download it from [HERE](#).

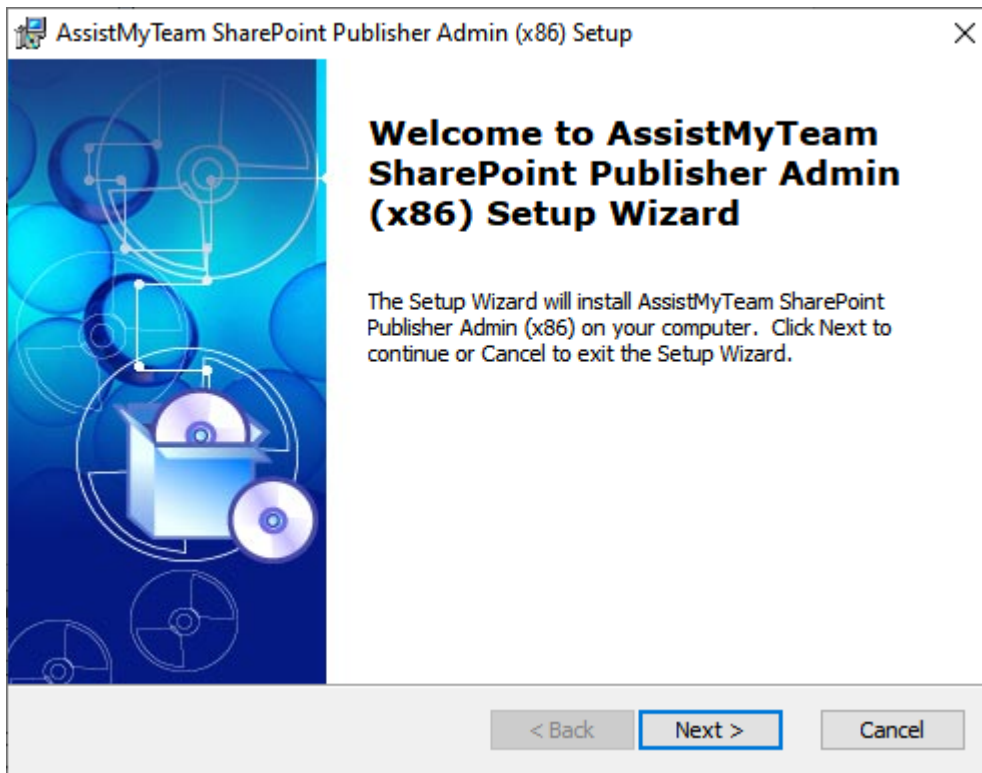




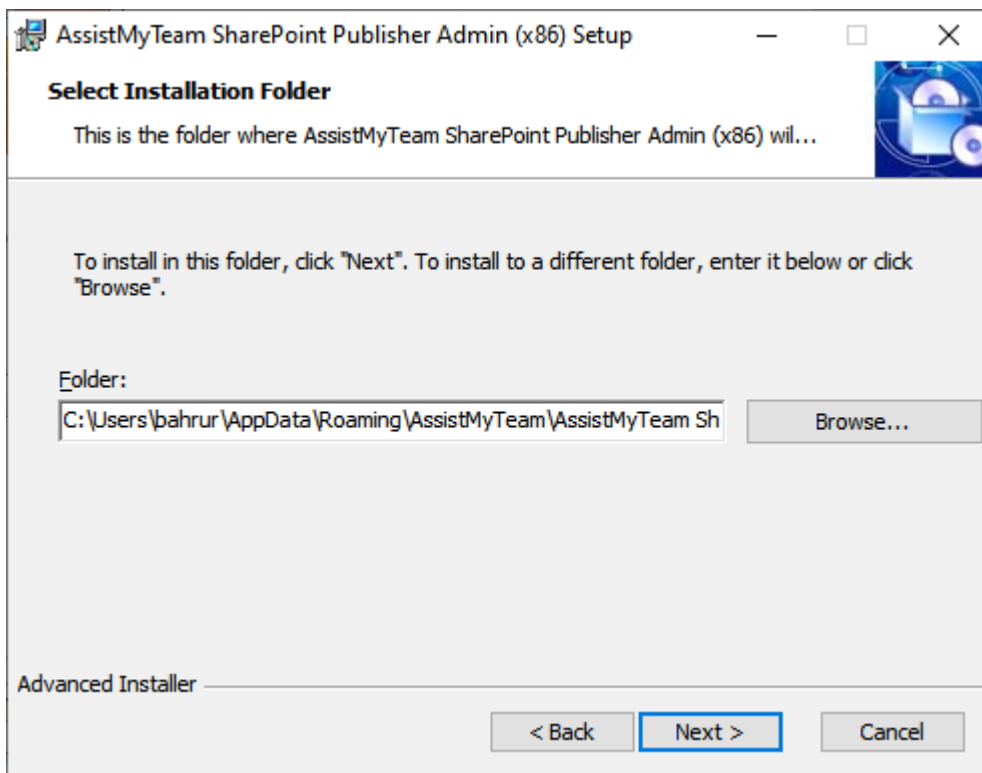
## 4.1 Admin Installation and Configuration

Step by step procedure is given below:

**Step 1.** Run the *SharePointPublisherAdminSetup.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.

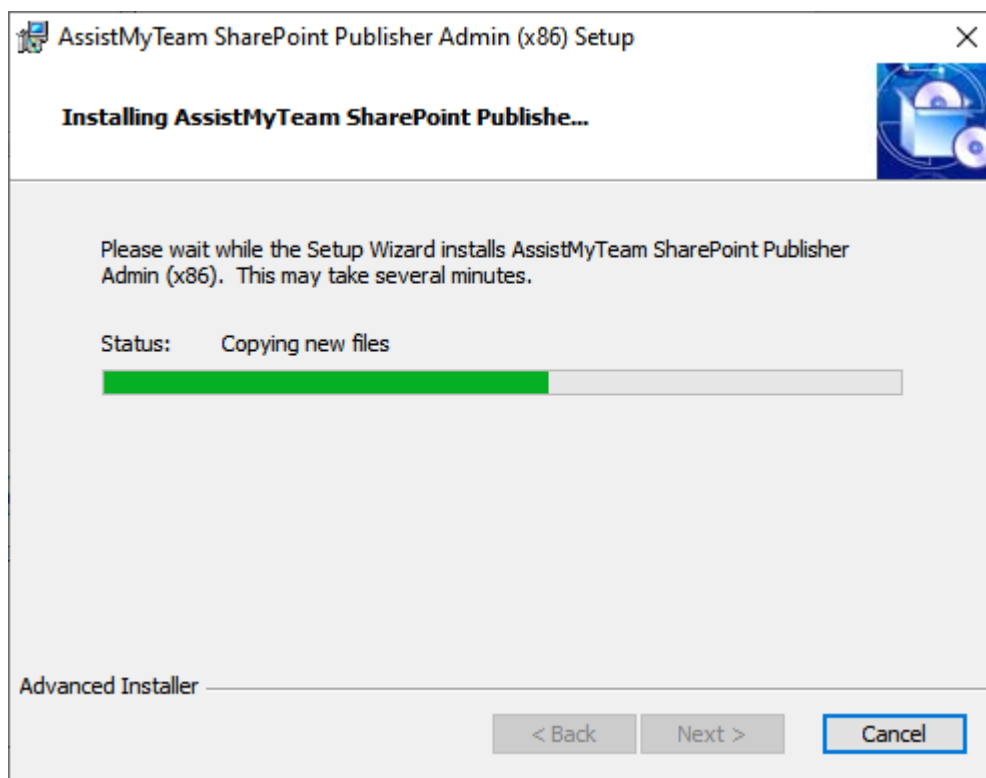


**Step 2.** Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your program files folder)

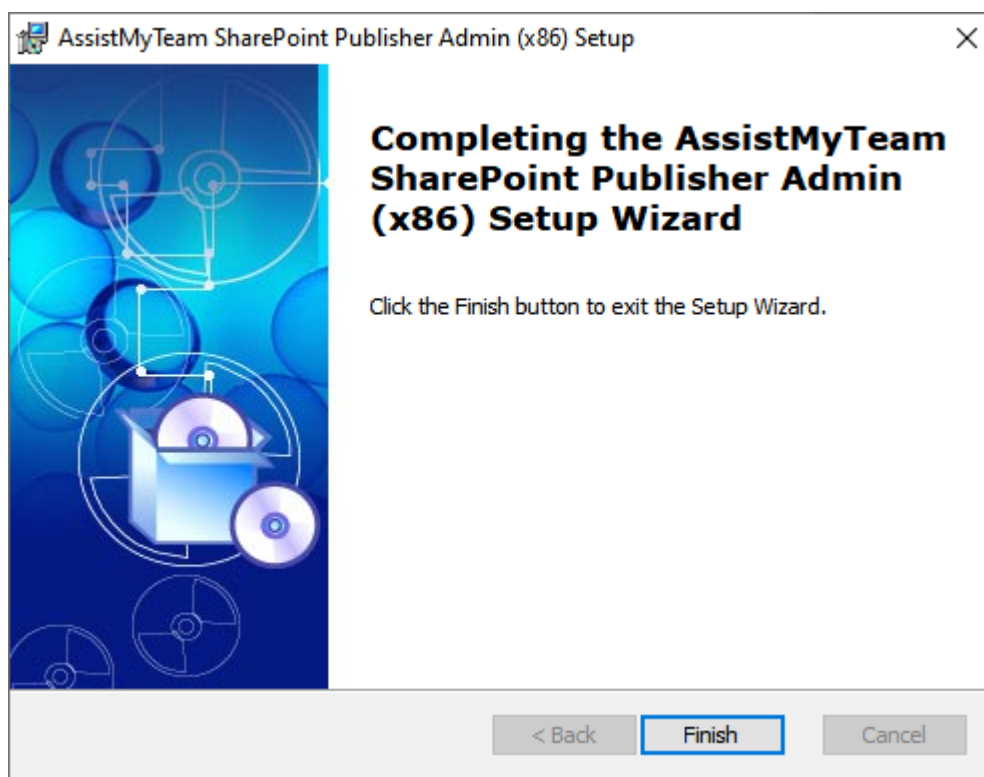


**Step 3.** Once you have verified the previous steps, click Next to continue the files extraction. It may take a few minutes to complete the whole copying process

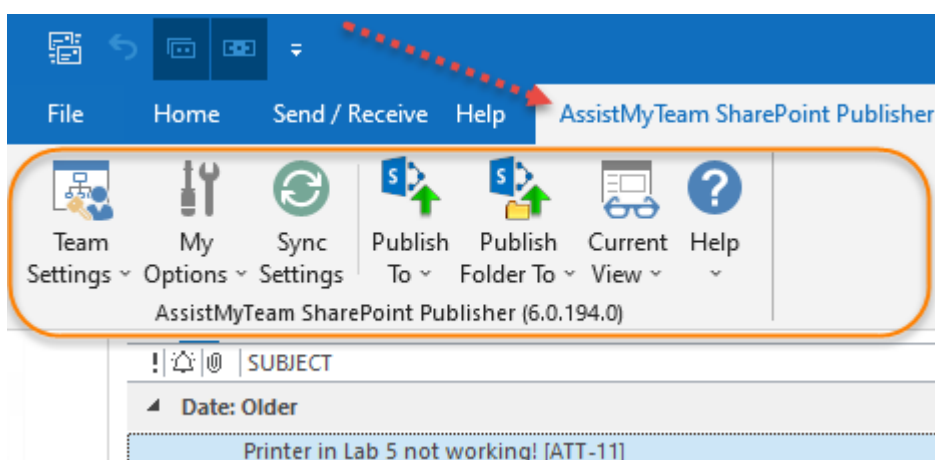




**Step 4.** Click '**Finish**' to proceed to the server configuration in Microsoft Outlook. This ends the files installation process in your system.



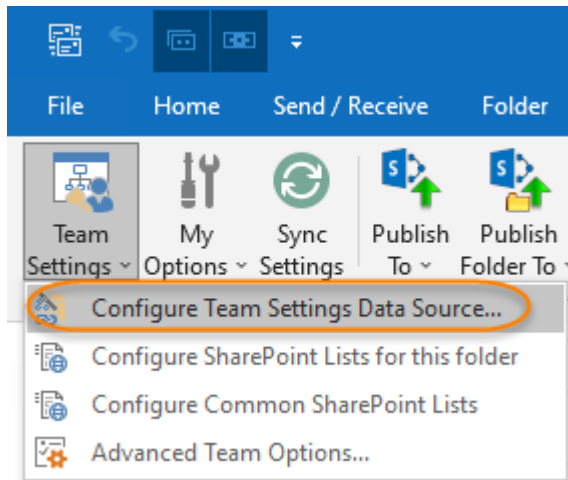
Once installed, start Outlook and you will see a dedicated tab in Outlook ribbon with the title 'AssistMyTeam SharePoint Publisher'



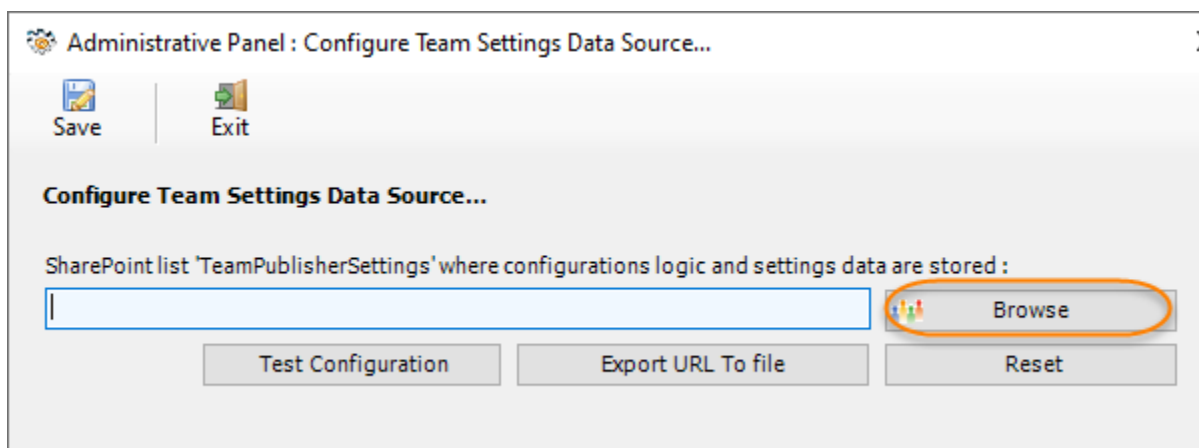


The next step is to choose a SharePoint site, under which, a new list titled '*TeamPublisherSettings*' would be created, to store the metadata and mapping settings as performed by the administrator. In short, this list will act as a Team Settings data source, and other users with the SharePoint Publisher User add-in would connect to it.

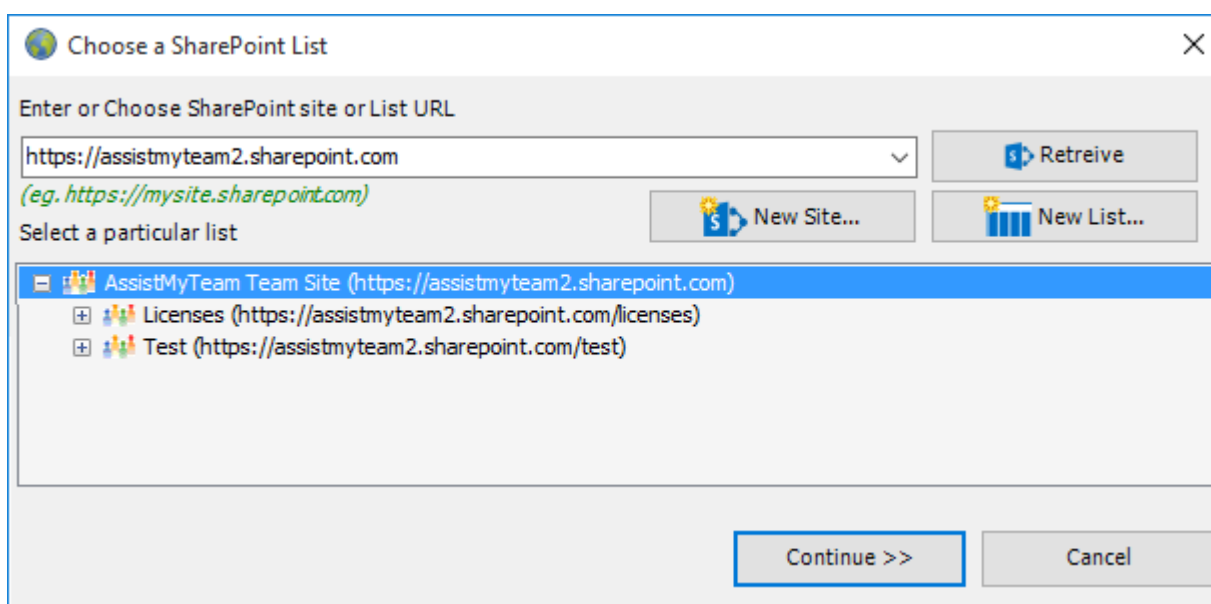
Start Outlook and you would be automatically prompted with the 'Team Settings Data Source...' panel. If it is not visible, you can invoke it from **Team Settings > Configure Team Settings Data Source...**



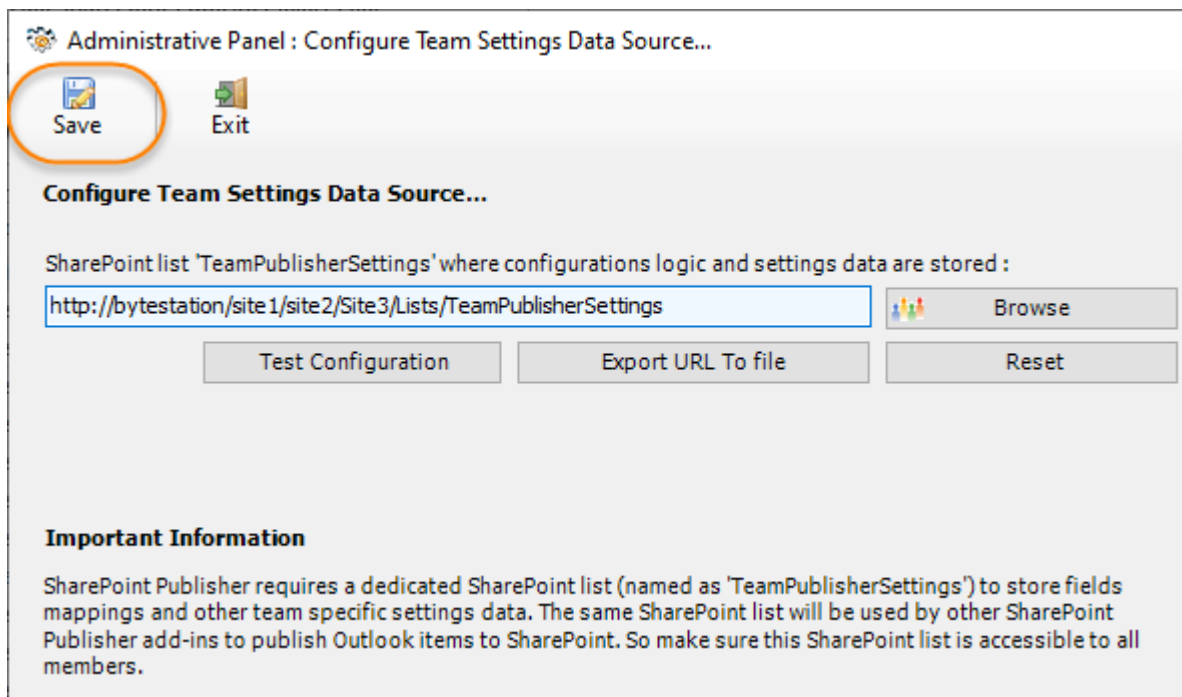
To specify a SharePoint site, click the '*Browse...*' button.



This would allow you to enter the URL of the SharePoint. When entering the URL, always use the parent site URL in the format *http://mySharePointsite*. And click '**Retrieve**' to show all available sub-sites and lists.



Select the particular site to which the Settings list would be created, and then click 'Continue'.



**NOTE:** This special list '*TeamPublisherSettings*' should not be manually created in your SharePoint site. Doing so, would break the trial/functionality of the add-in. You should only allow the SharePoint Publisher Admin add-in to create it on the fly from the '**Team Settings Data Source panel**' in Outlook.

Before you and other users 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. There are two ways of doing it:

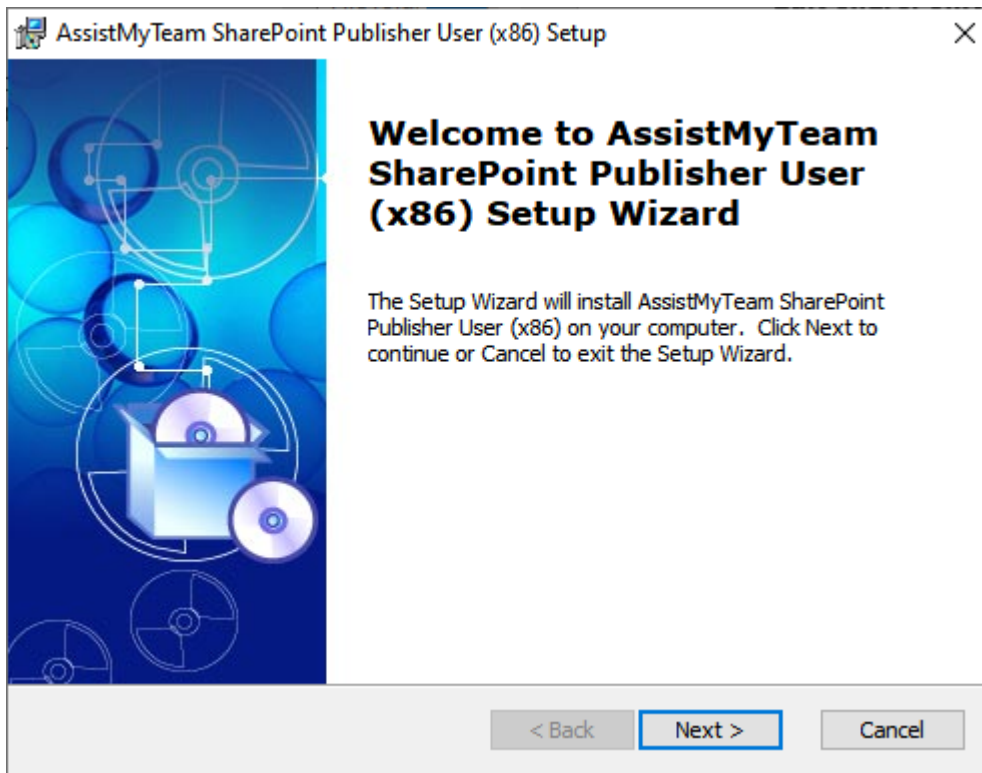
- Team Settings: [Configuring SharePoint lists specific to an Outlook folder](#)
- Team Settings: [Configuring SharePoint lists common to all Outlook folders](#)



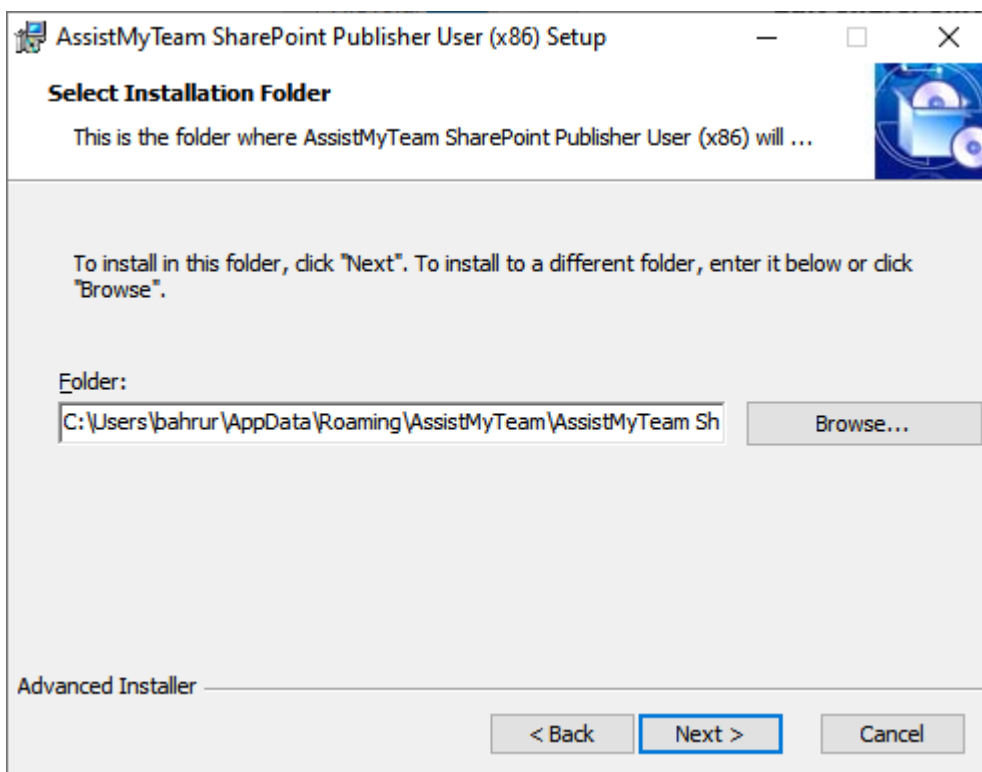
## 4.2 User Installation and Configuration

Step by step procedure is given below:

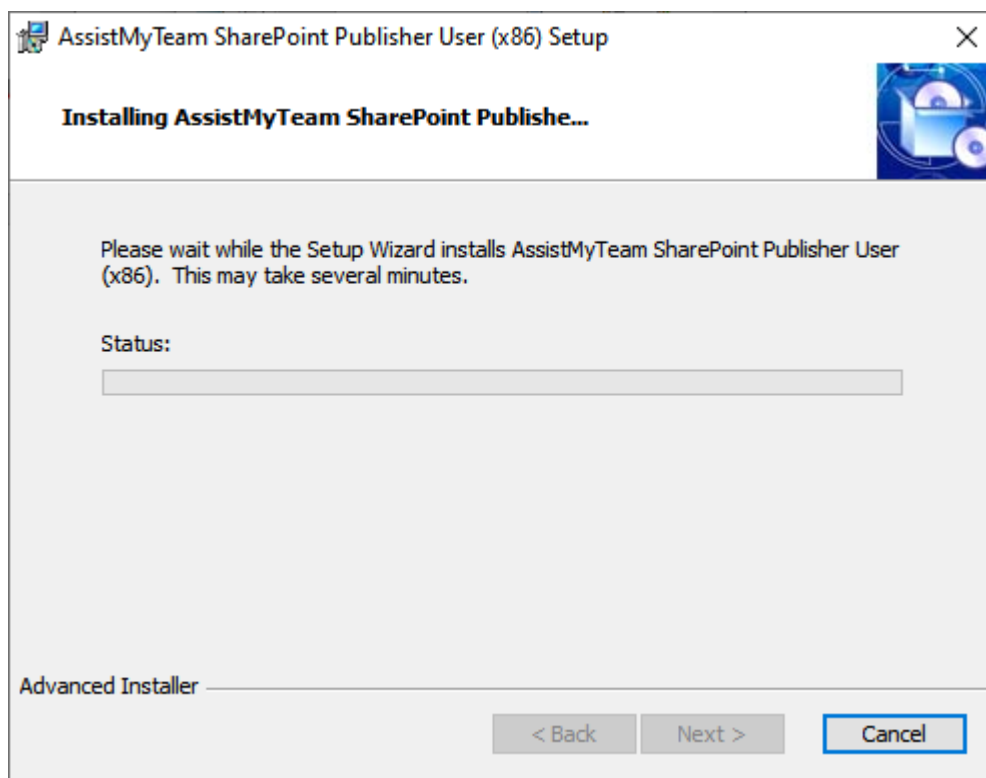
**Step 1.** Run the *SharePointPublisherUserSetup.exe* to start the installation. Click Next to Continue. If Outlook 2010 or later is not installed, the setup wizard will not be able to proceed. Please also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has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



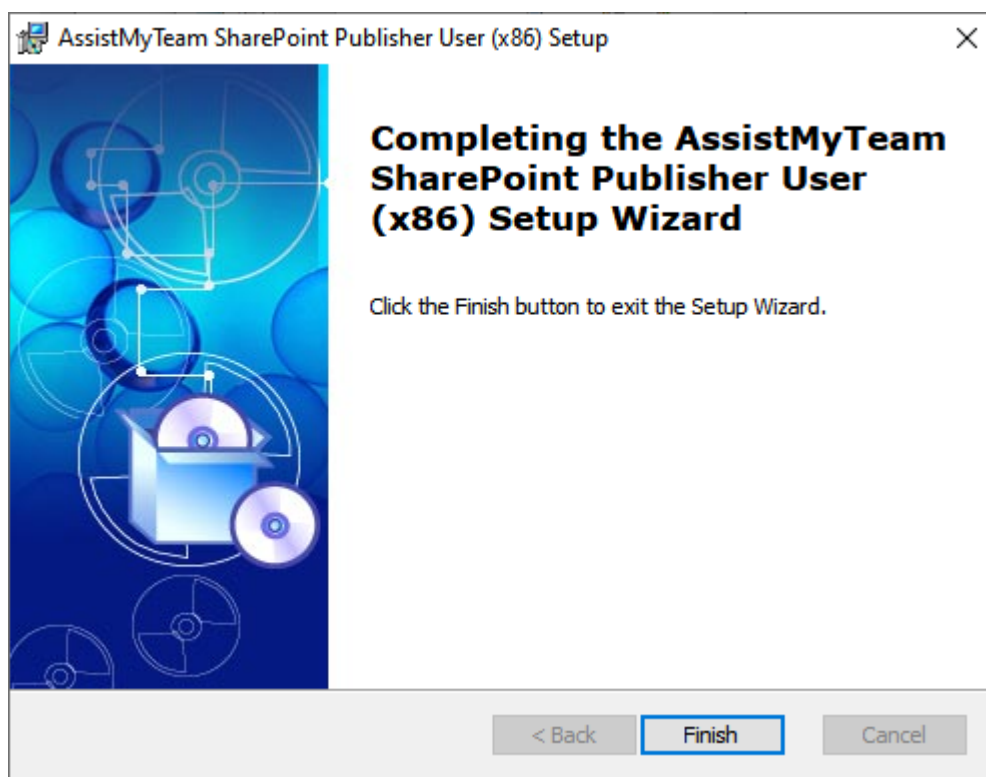
**Step 2.** Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your program files folder)



**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

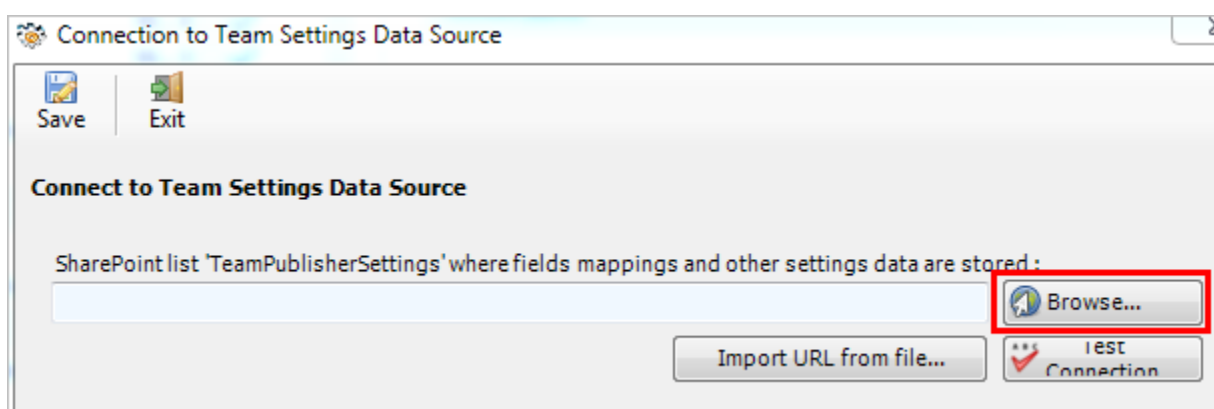


**Step 4.** Click '**Finish**' to proceed to the server configuration in Microsoft Outlook. This ends the files installation process in your system.



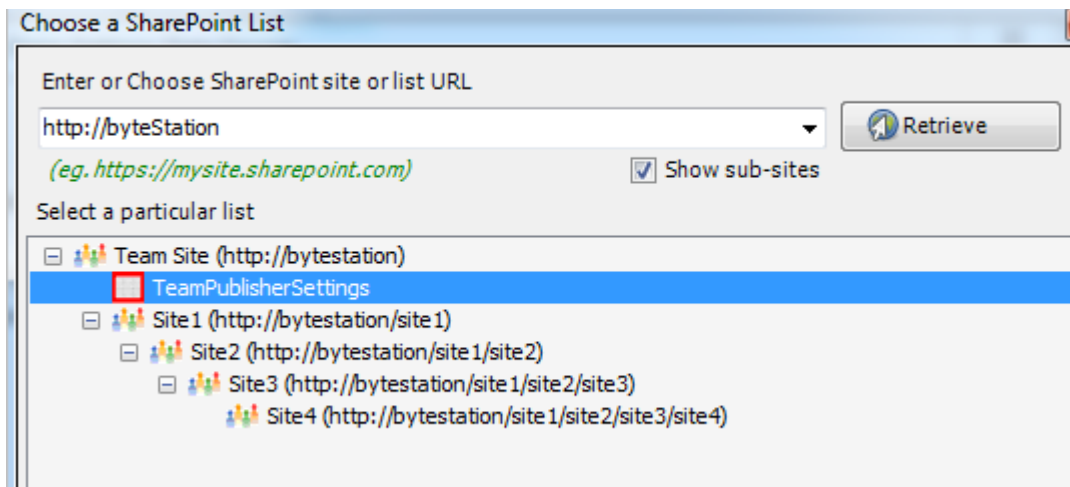
Once installed, the user will be prompted to specify the Team SettingsData Source, which is nothing, but a special SharePoint list having the title '*TeamPublisherSettings*', which was configured previously by your administrator.

If the 'Team Settings Data Source' panel does not show up, you can invoke from the **My Options menu > Set Team Settings Data Source...**

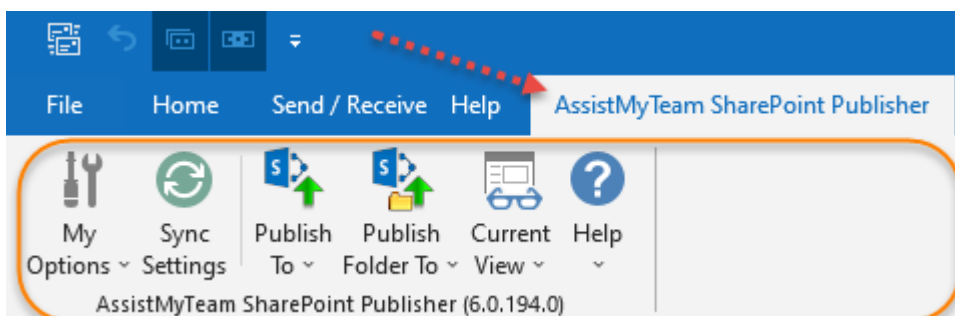
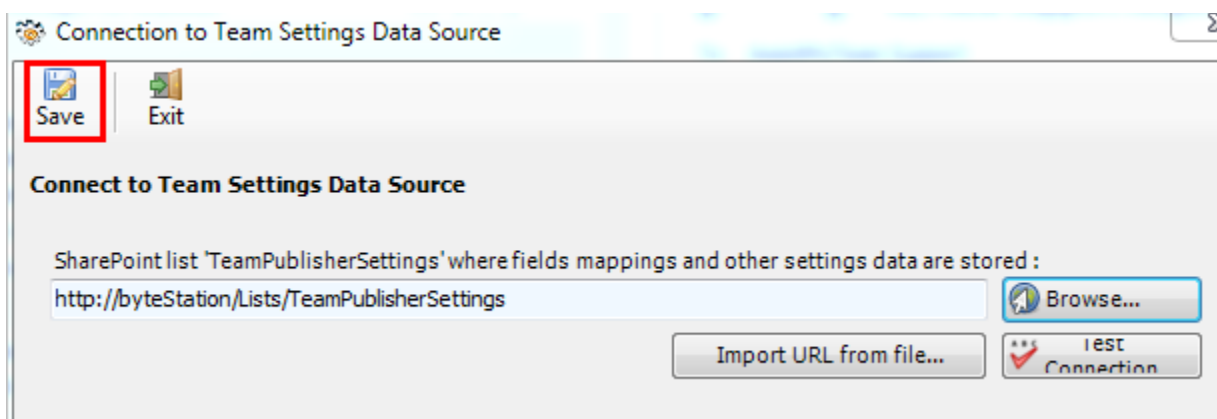


Click '**Browse...**' to specify the SharePoint site where the '*TeamPublisherSettings*' list is located

If your administrator had already configured SharePoint Publisher, there would be a list '*TeamPublisherSettings*' which stores metadata information to configured SharePoint lists and their mapping settings with Outlook.

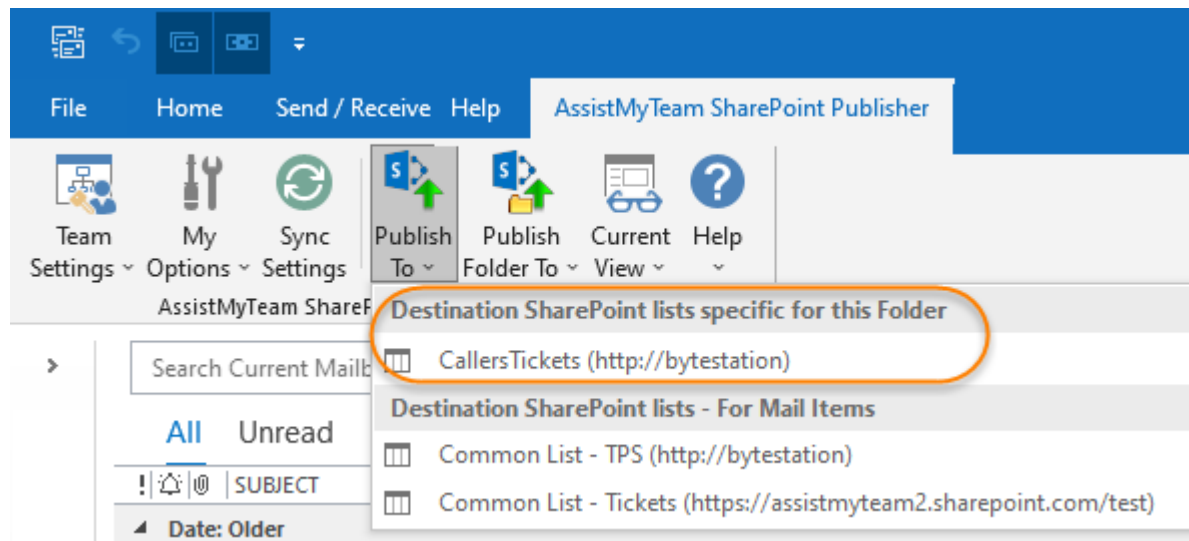


Now, click the **Save** button, to confirm the connection to the Team Settings Data Source. SharePoint Publisher is now ready to start publishing Outlook contents to the administrator chosen SharePoint lists, in a single click.



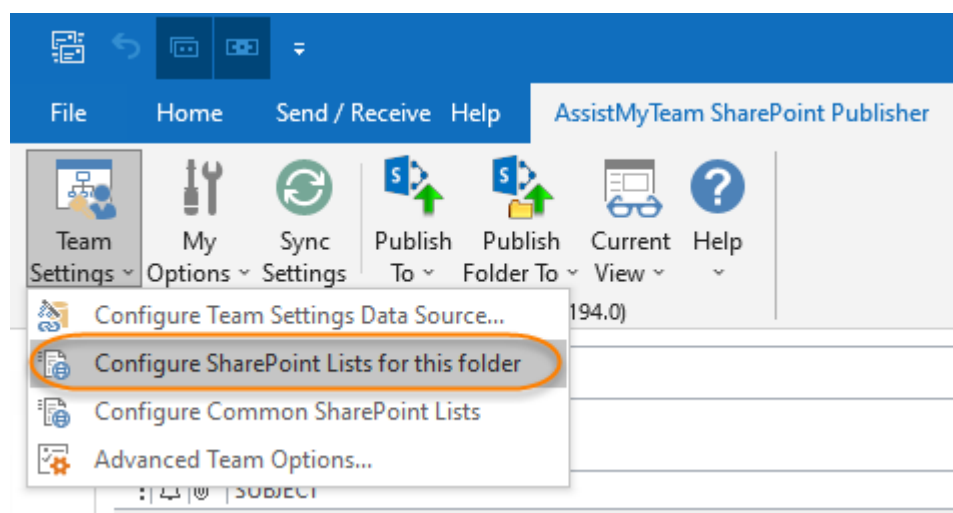
## 5. Team Settings: Configuring SharePoint lists specific to an Outlook folder

Before you and other users 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.

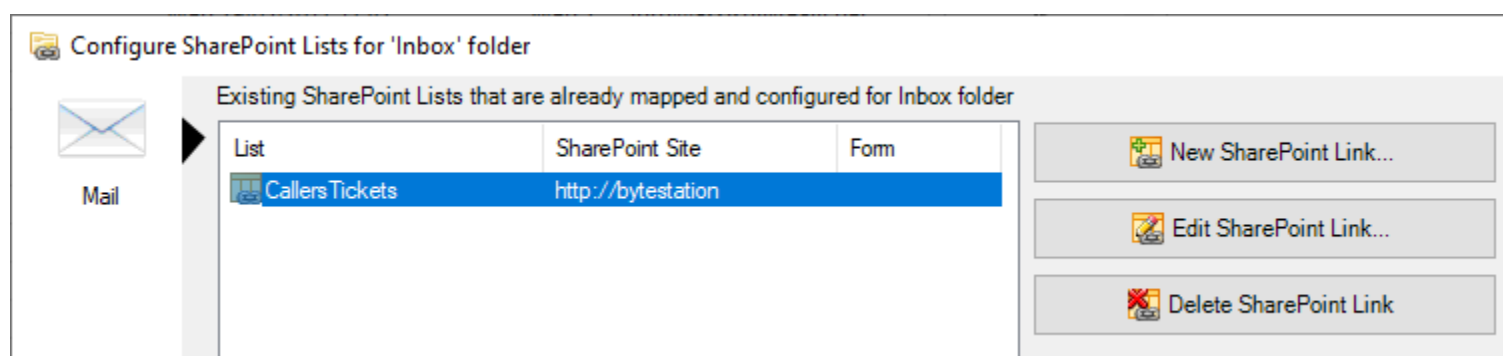


The first step is to choose a SharePoint list, which will be used to store the published items from Outlook. You can define multiple SharePoint lists for each Outlook folder, or you can define common SharePoint lists that can be used for publication.

To configure a new SharePoint list and map fields with the particular Outlook folder, go to **Team Settings menu > 'Configure SharePoint Lists for this folder'**.



Here, you can choose 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.



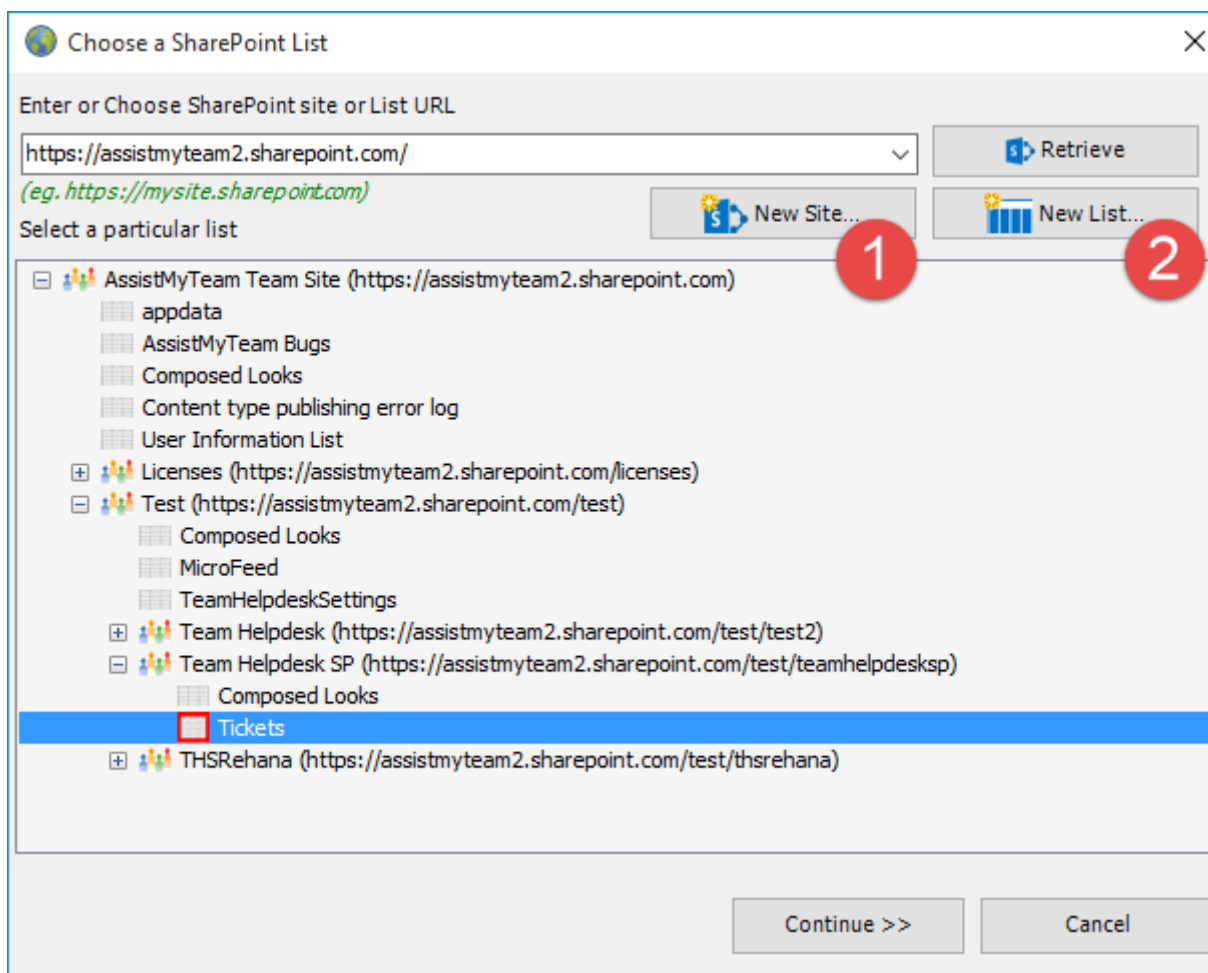
The Configurations Panel (above) shows all the configured SharePoint lists available for this particular Outlook folder. To re-configure mapping of an existing one, select the SharePoint link from the box, and click **'Edit SharePoint Link'** button.

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.

	Outlook Field	Data Type	SharePoint Field
32	ReminderTime	Date/Time	
33	ReplyRecipientNames	Text	
34	SenderEmailAddress	Text	SenderEmailAddress
35	SenderName	Text	SenderName
36	Sensitivity	Choice	
37	SentOn	Date/Time	
38	SentOnBehalfOfName	Text	
39	Size	Numeric	
40	Subject	Text	Title
41	To	Text	To
42	ToEmailAddress	Text	ToEmailAddress
43	VotingResponse	Text	

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.



*Mapping of fields between Outlook and SharePoint*

	Outlook Field	Data Type	SharePoint Field
8	Companies	Text	
9	ConversationTopic	Text	
10	CreationTime	Date/Time	
11	DeferredDeliveryTime	Date/Time	
12	DeleteAfterSubmit	Yes/No	
13	ExpiryTime	Date/Time	
14	FlagRequest	Text	
15	HTMLBody	Note	
16	Importance	Choice	

Field name

Specify a unique name for the new field.

OK

Cancel

Companies

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.

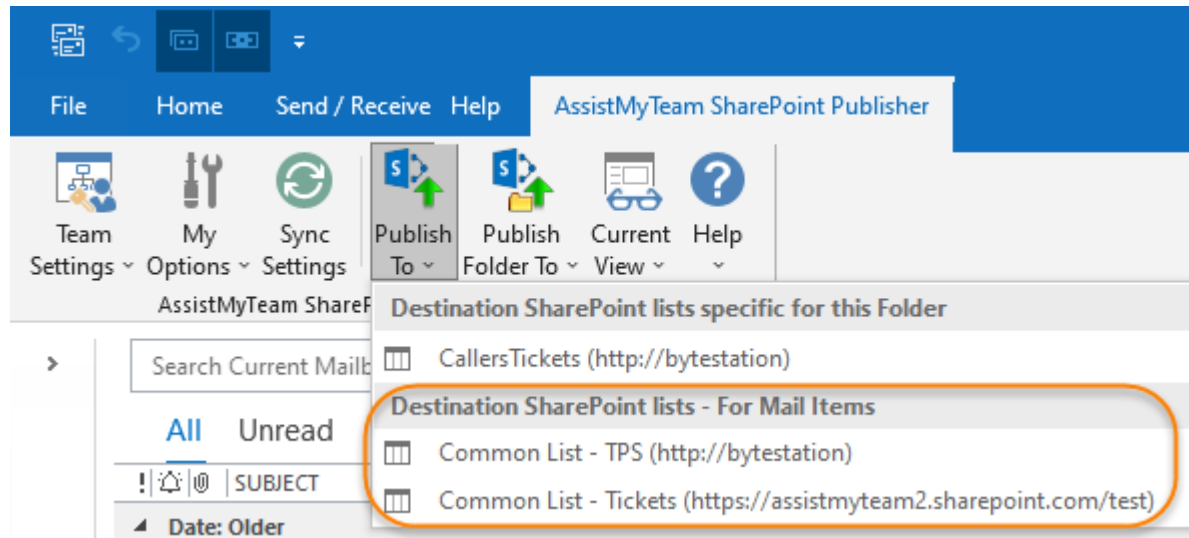
*Mapping of fields between Outlook and SharePoint*

	Outlook Field	Data Type	SharePoint Field
5	Body	Note	
6	Categories	Text	Categories
7	CC	Text	CC
8	Companies	Text	Companies
9	ConversationTopic	Text	

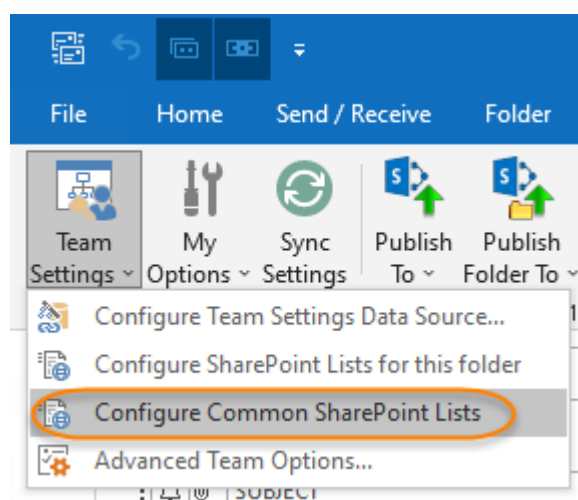


## 6. Team Settings: Configuring SharePoint lists common to all Outlook folders

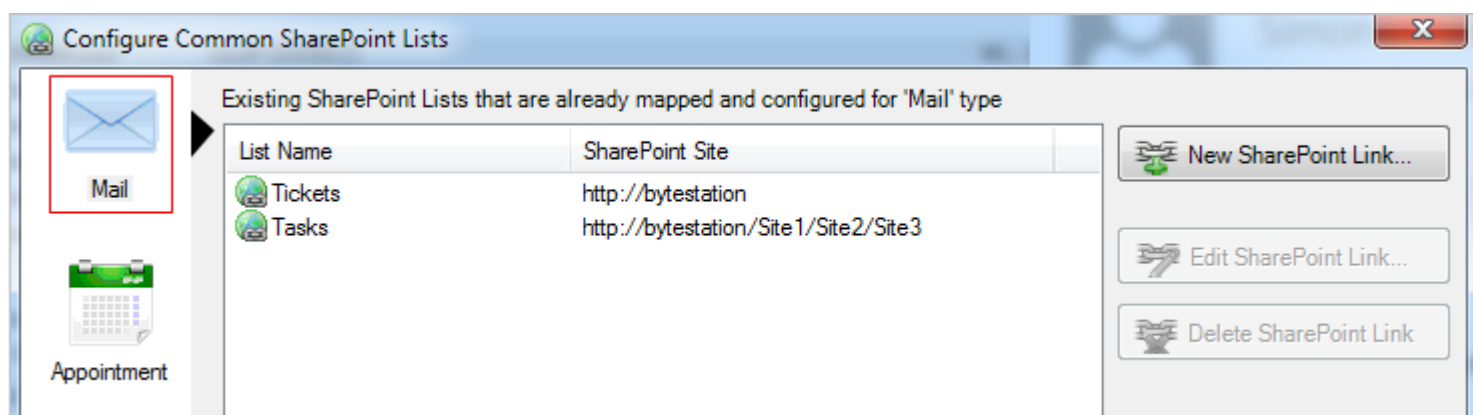
You can define any number of common SharePoint lists that will be used for publishing from any Outlook folder. Commonly configured SharePoint lists and mappings act as a template for all Outlook folders and would appear in the '**Publish To**' dropdown menu in the SharePoint Publisher toolbar or ribbon.



To define a common SharePoint list and mapping for all Outlook folders, go to **Team Settings** menu > '**ConfigureCommon SharePoint lists**', as illustrated on the below:

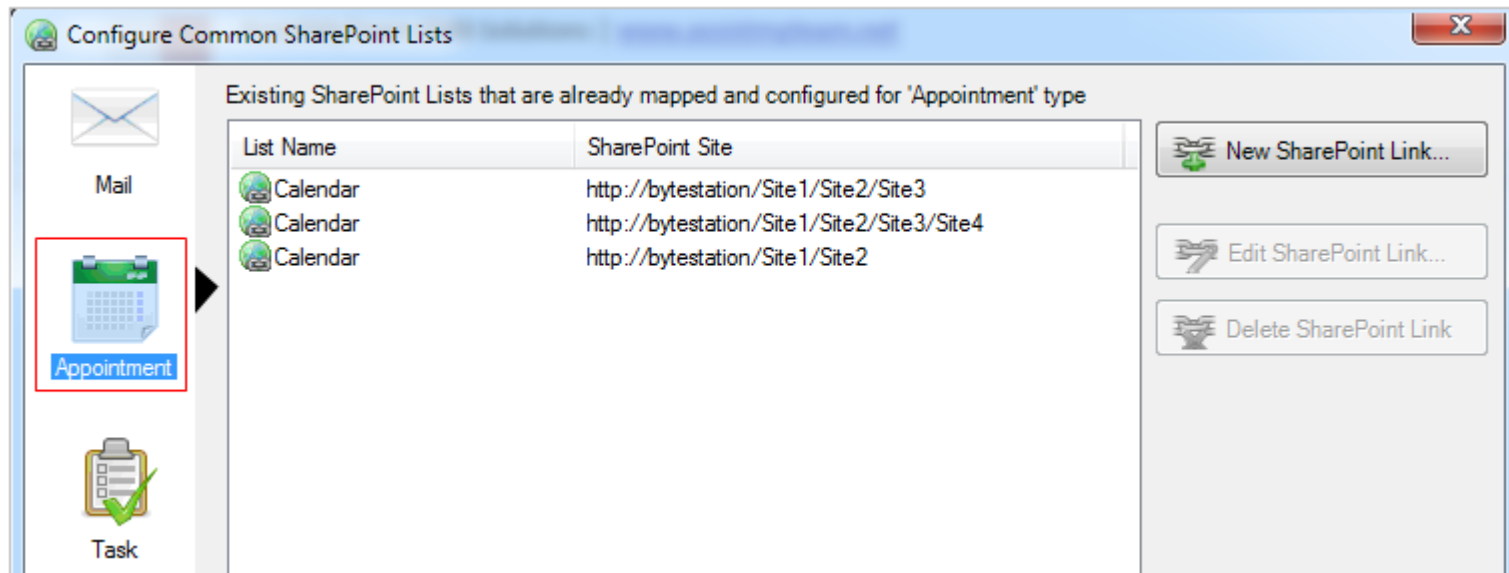


In this common SharePoint lists panel, you can choose for which particular type of Outlook item, will the configured SharePoint list and mapping be associated with. Type of items can be *mail*, *appointment*, *task*, *journal* or *contact*.



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.

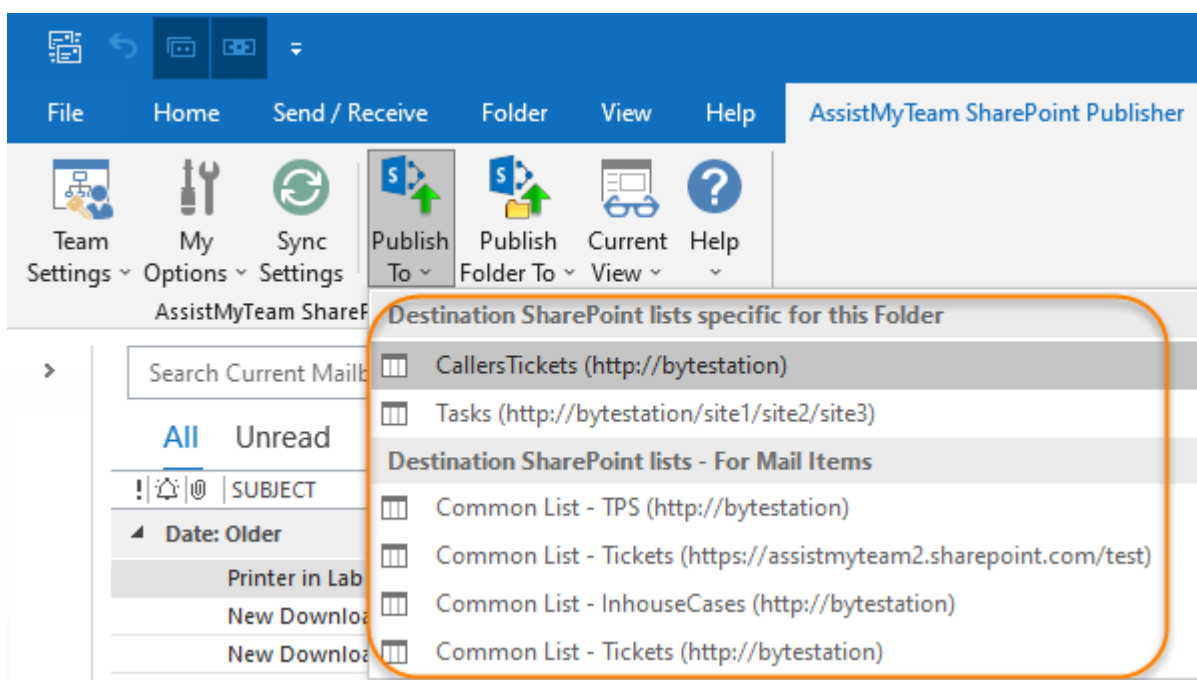
Likewise, you can specify SharePoint lists that will store published appointments from Outlook.



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 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.*

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.

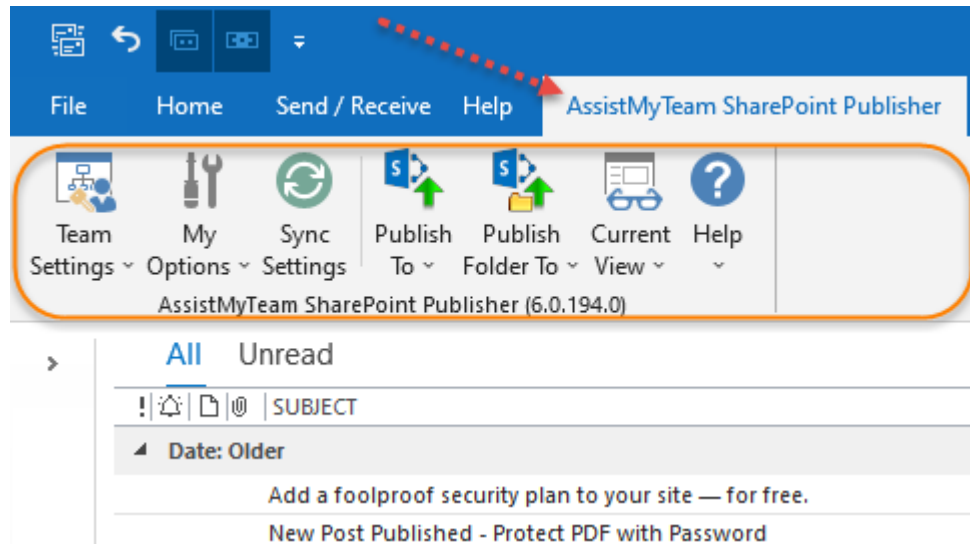




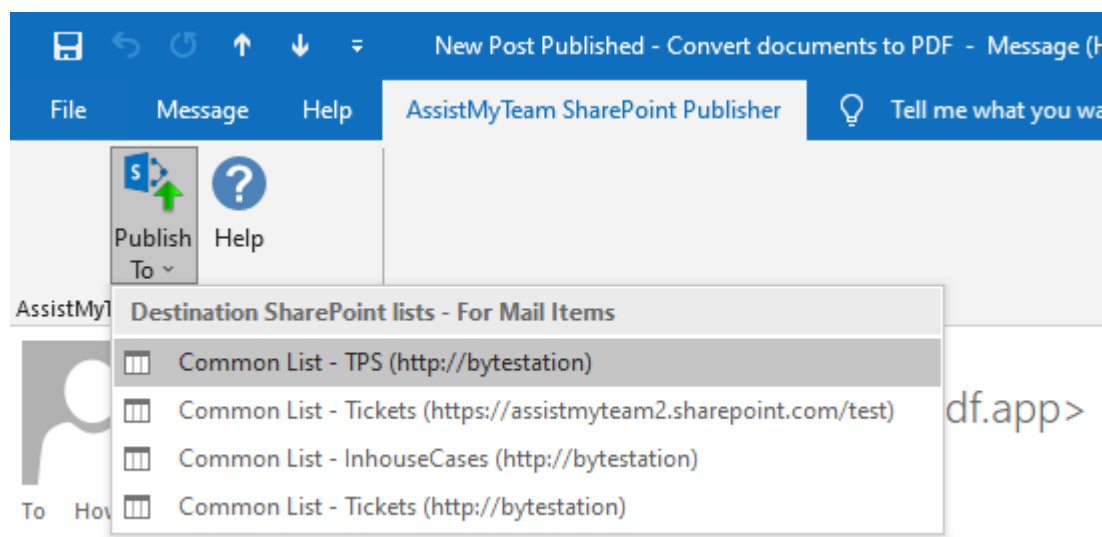
## 7. Publishing Outlook Items to SharePoint

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.

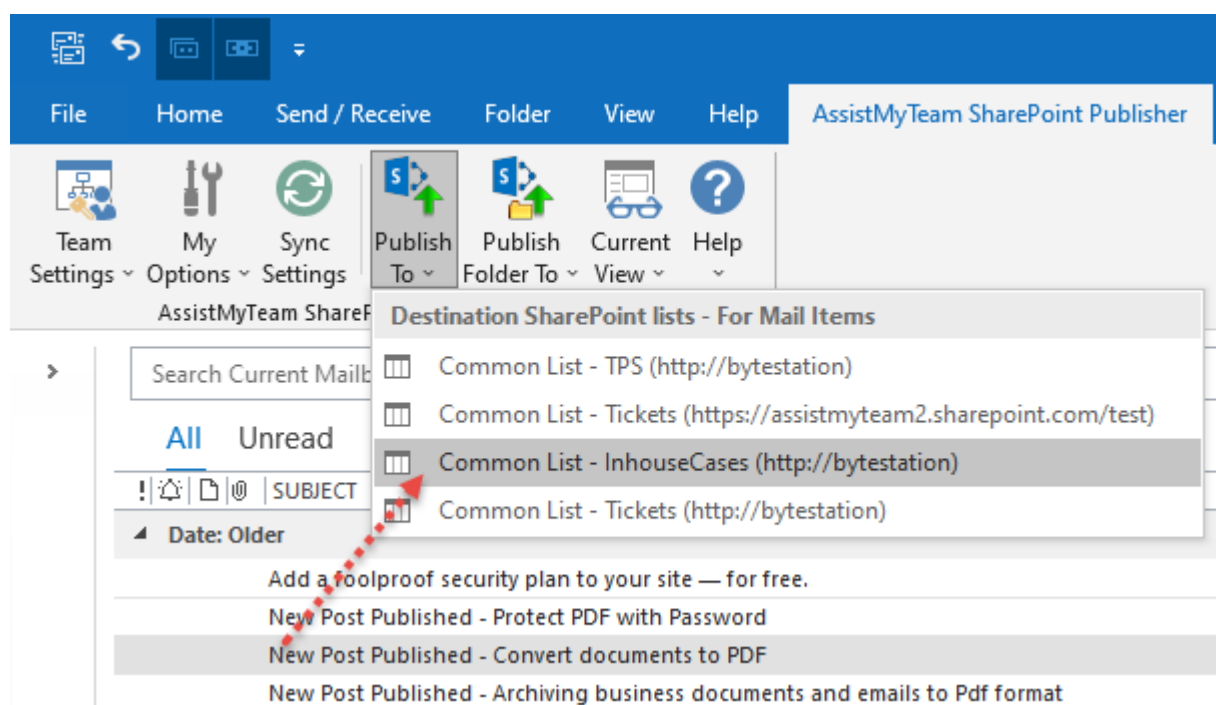
SharePoint Publisher specific toolbar available as a dedicated tab in Outlook Explorer window.



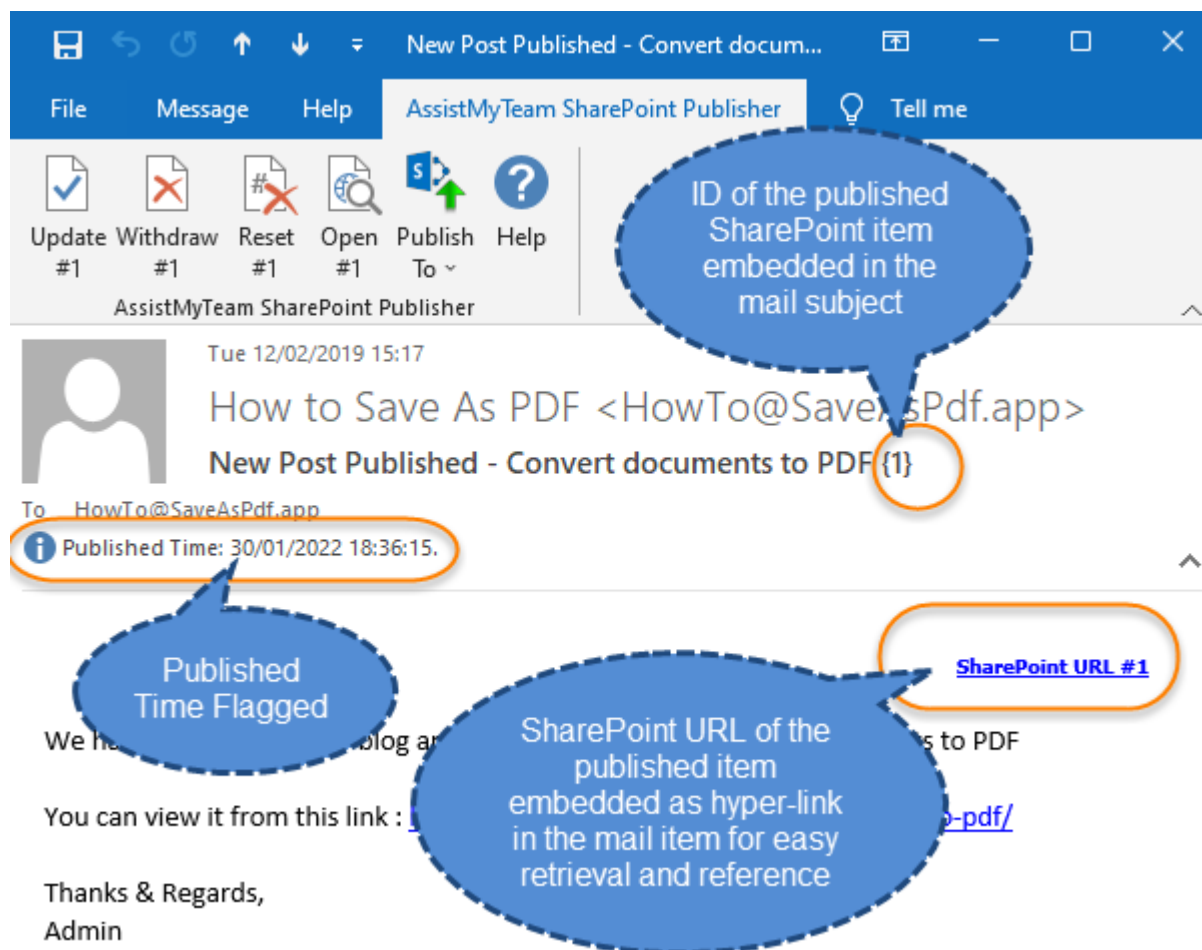
SharePoint Publisher specific ribbon available as dedicated tab of the Outlook mail inspector window.



To publish an Outlook item to one of the administrators chosen SharePoint list, simply click the corresponding the SharePoint list name from the '**Publish To**' drop down. When you do this, relevant metadata will be extracted from each of the selected Outlook items, based on the fields mapping settings and exported to the SharePoint list of your choosing.

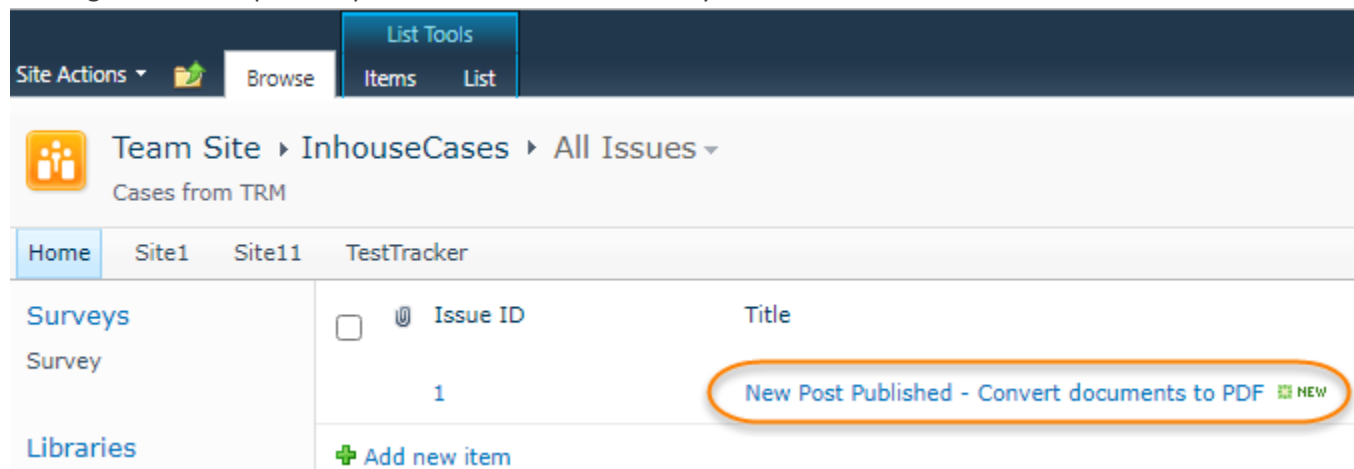


Once an Outlook item is successfully published, it will be tagged as being published internally in Outlook and will get an embedded hyper-link in the body field containing the ID of the published item of the SharePoint (e.g., *SharePoint URL #1*).



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

Version History

Alert Me

Manage Permissions

Manage

Delete Item

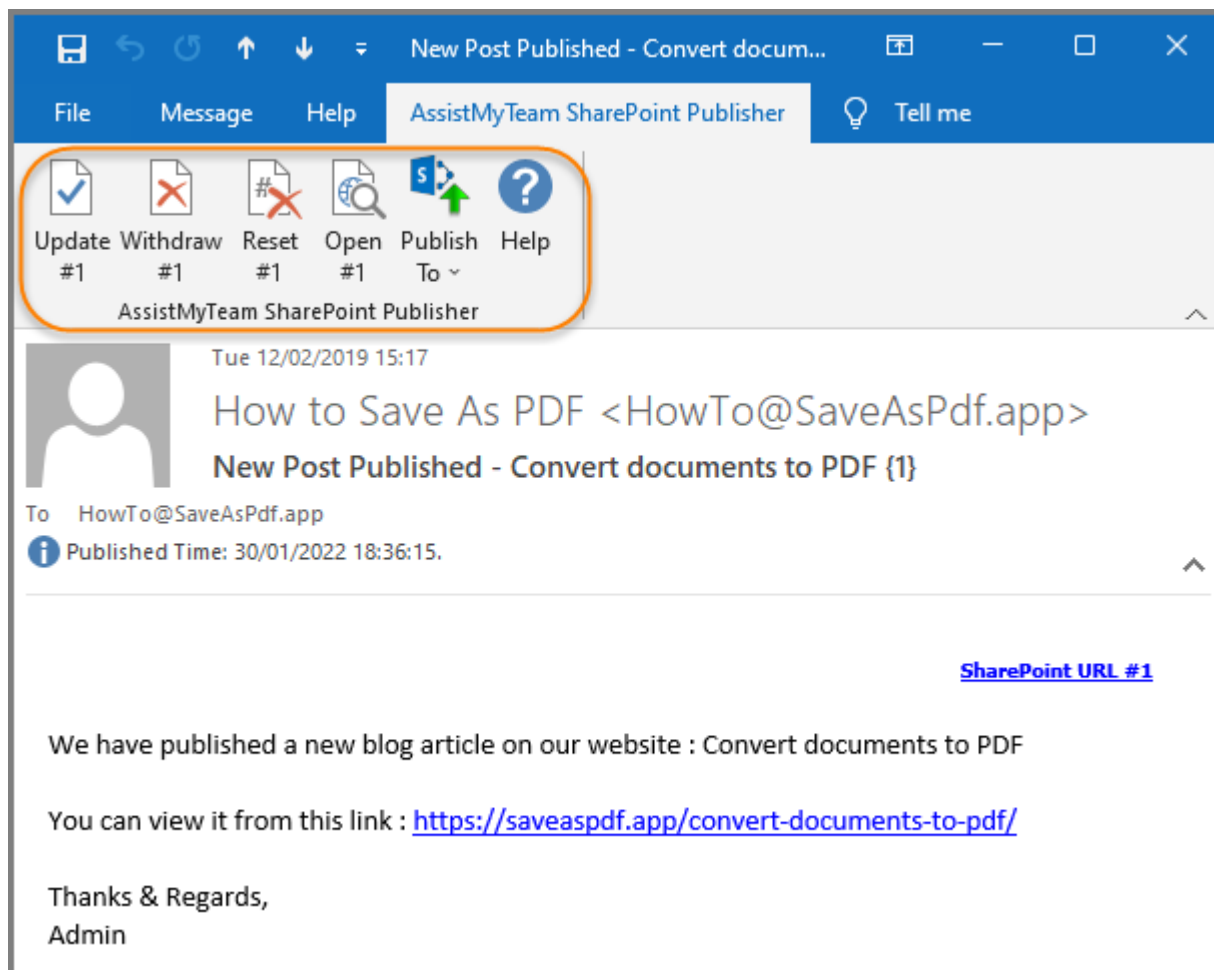
Actions

Edit Item

Title	New Post Published - Convert documents to PDF
Assigned To	
Issue Status	Active
Priority	(2) Normal
Description	<div> <p>We have published a new blog article on our website : Convert documents to PDF</p> <p>You can view it from this link : <a href="https://saveaspdf.app/convert-documents-to-pdf/">https://saveaspdf.app/convert-documents-to-pdf/</a></p> <p>Thanks &amp; Regards, Admin</p> <p>You received this email because in the past you have provided us your email address : <a href="mailto:HowTo@SaveAsPdf.app">HowTo@SaveAsPdf.app</a> to receive notifications when new updates are posted.</p> <p>No longer interested in emails from How to Save As PDF? Please <a href="#">click here</a> to unsubscribe.</p> </div>
Category	(2) Category2
Related Issues	
Comments	No existing entries.
Due Date	
To	<a href="mailto:HowTo@SaveAsPdf.app">HowTo@SaveAsPdf.app</a>
SenderName	How to Save As PDF
CC	
BCC	
SenderEmailAddress	<a href="mailto:HowTo@SaveAsPdf.app">HowTo@SaveAsPdf.app</a>
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.

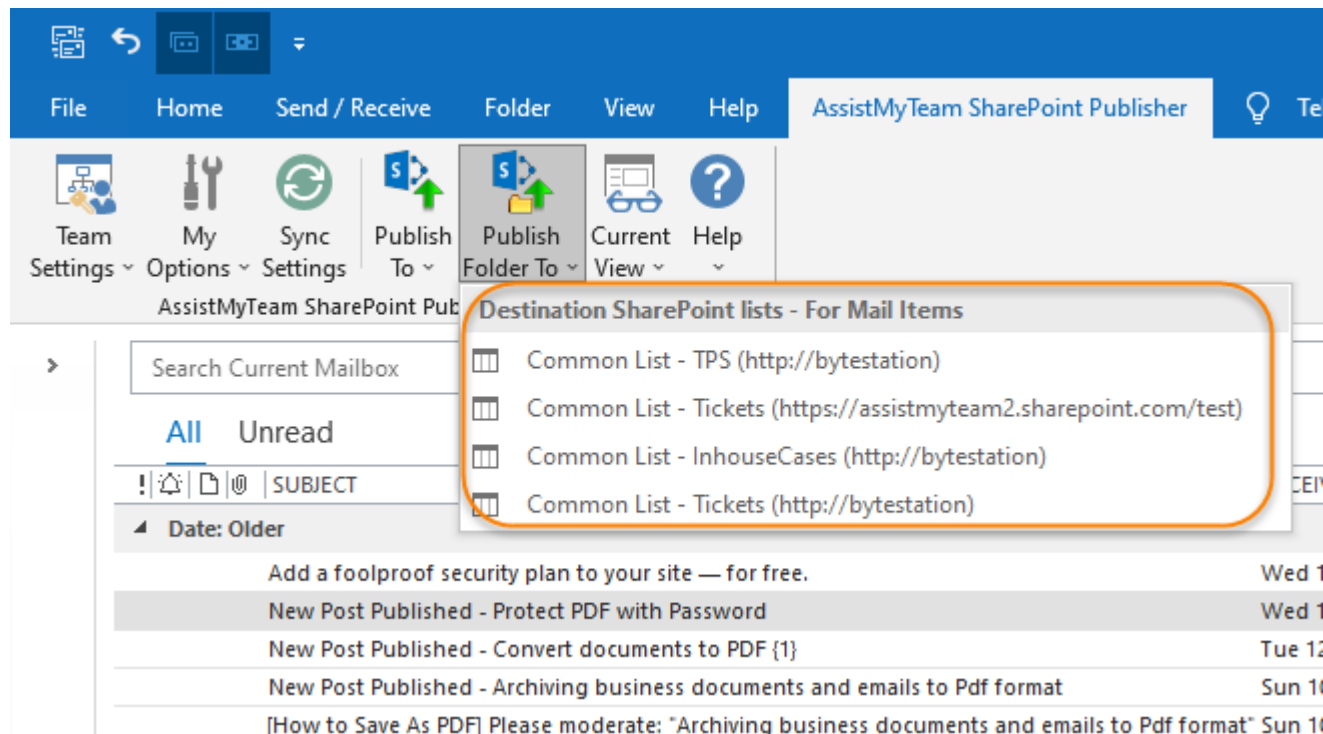


Note that, the functionality to make update and revision or withdraw published SharePoint item depends on the administrative settings. If the administrator had enabled it, individual member can make revision update or withdraw the published SharePoint item directly from the corresponding Outlook item.

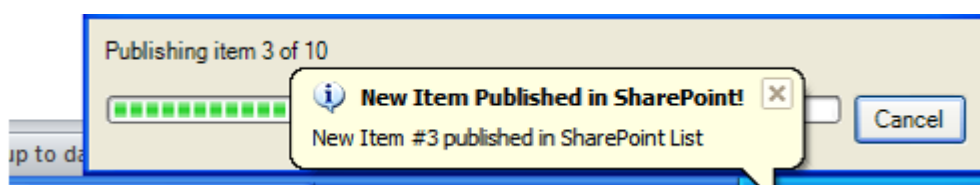
You can use the '*Untag*' button to remove all references and links to the published SharePoint item from the Outlook item. This will reset the Outlook item, and you can then re-publish to a different SharePoint list.

## 9. Publish whole contents of an Outlook folder

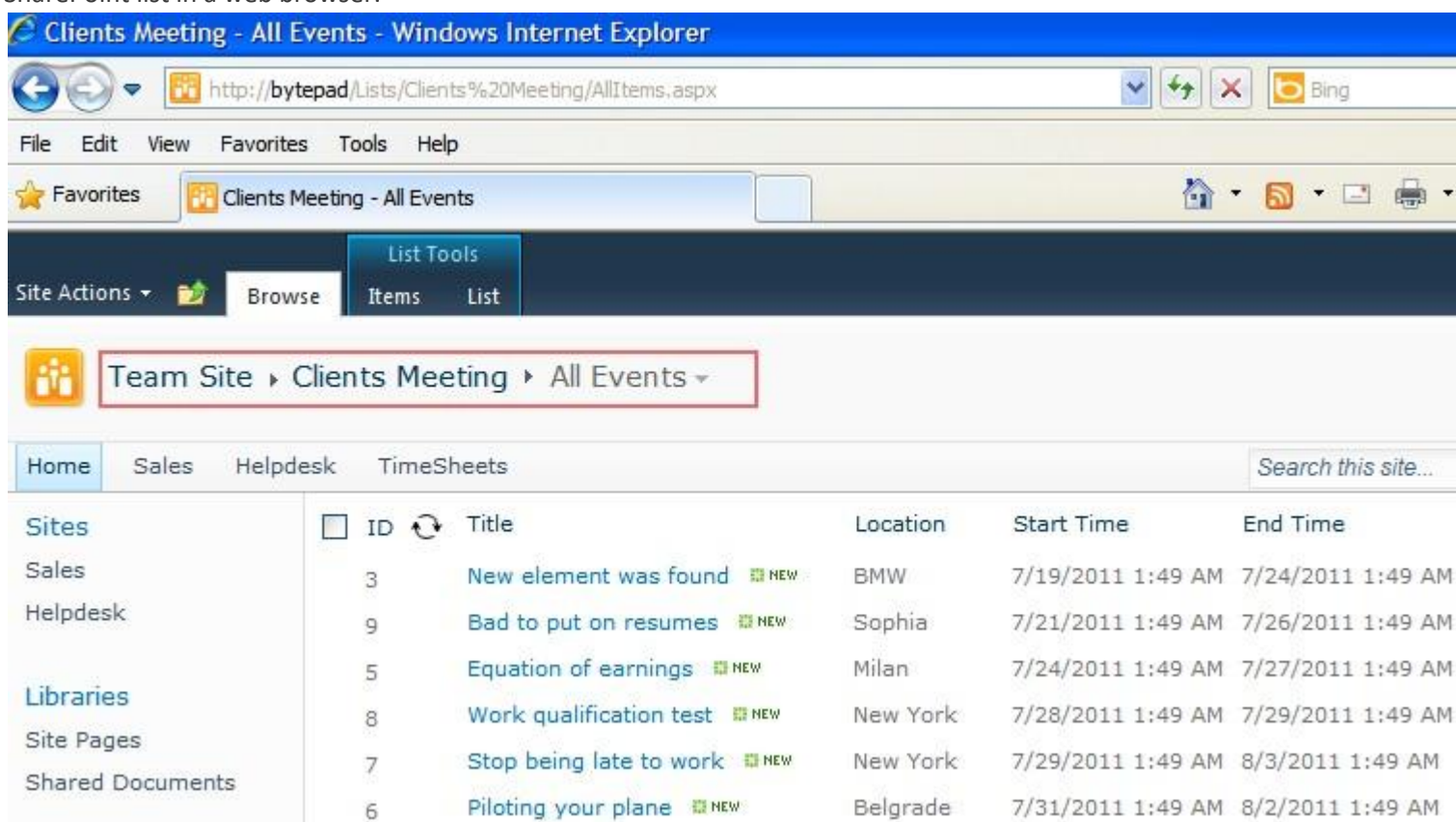
If you wish to publish the whole contents of an Outlook folder to SharePoint, you can do so from the *Advanced drop-down menu > Publish Folder To*. All you need to do is, specify a particular SharePoint list.



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.



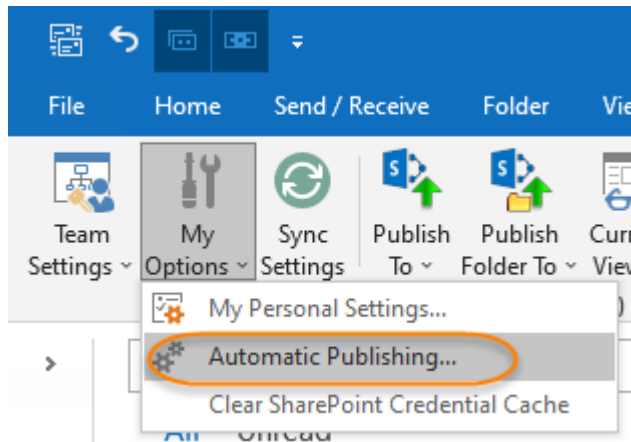
Once all the items from the current folder are published successfully to the specified SharePoint list, it will open the SharePoint list in a web browser.



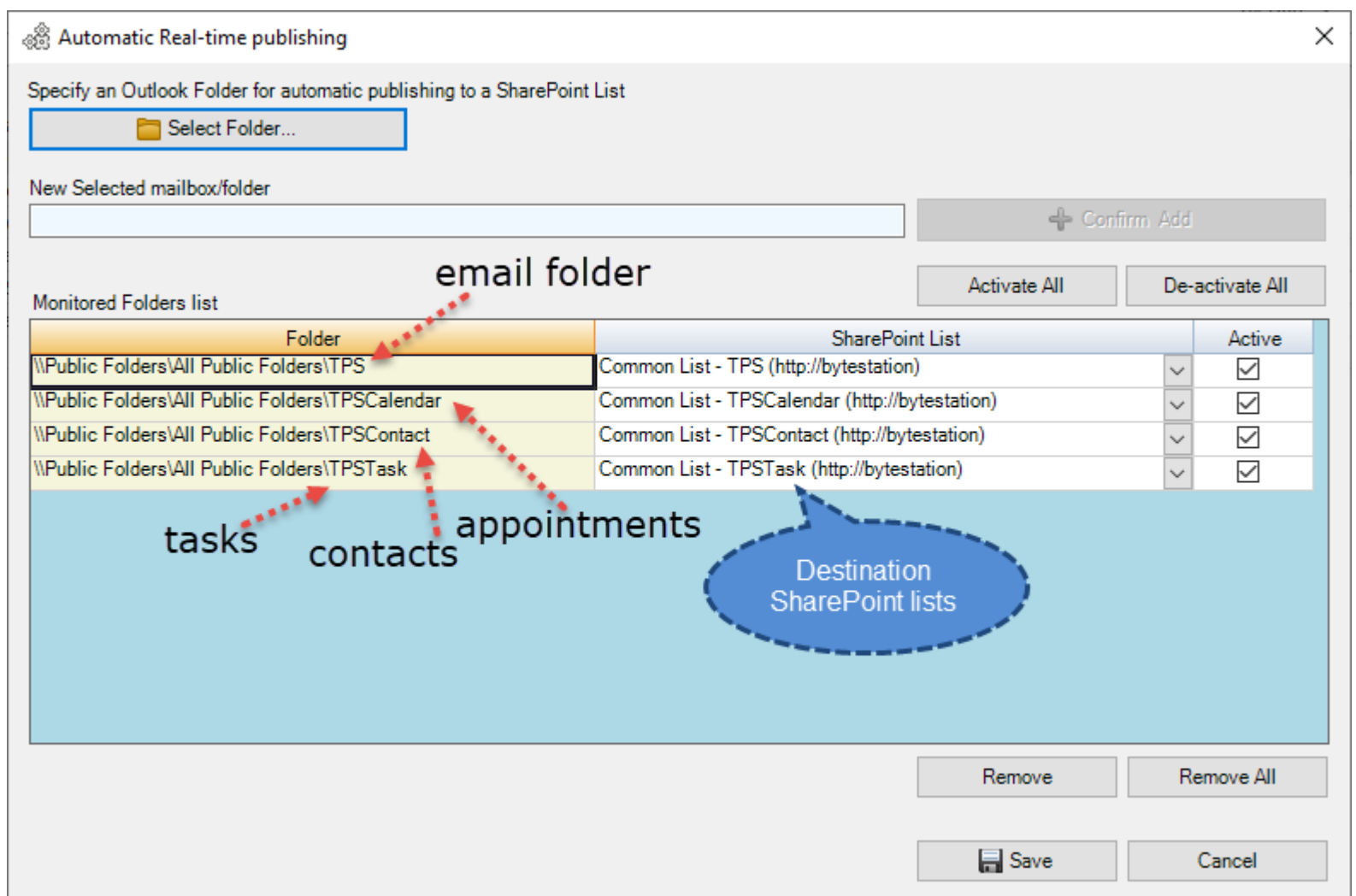
## 10. Automatic publishing of Outlook items to SharePoint

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 SharePoint manually.

To configure the Automatic Publishing feature, go to 'My Options' 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.



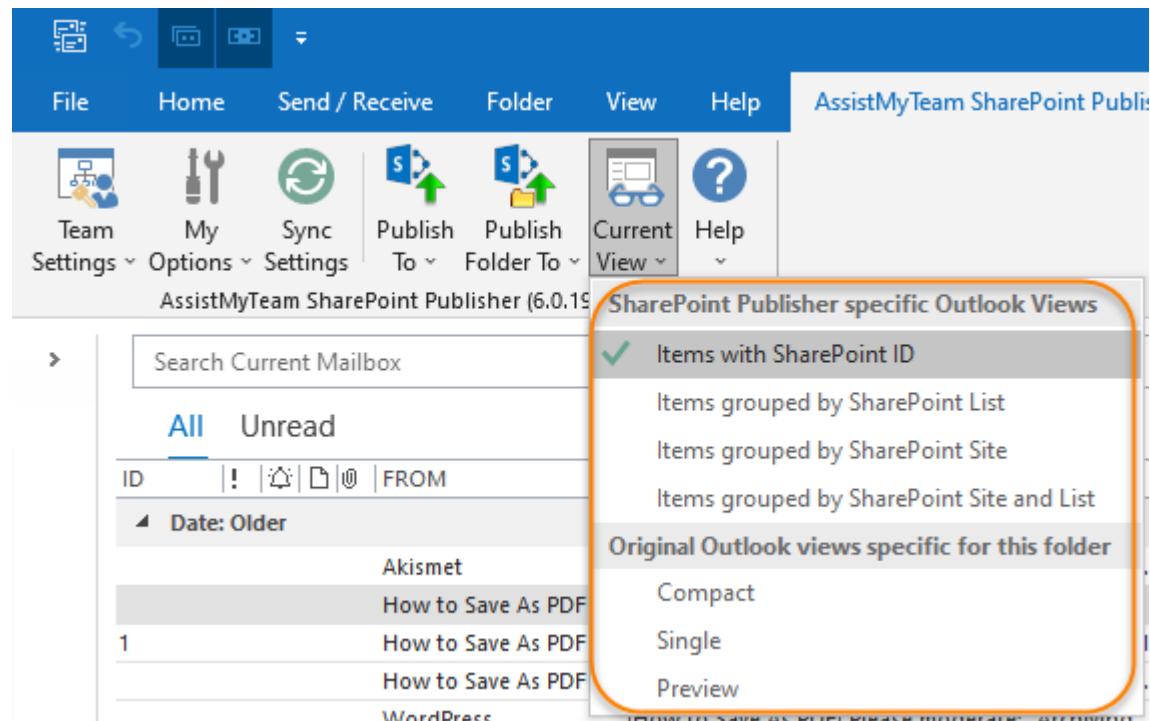
To monitor a new Outlook folder, press the 'Select Folder...' button and choose the desired Outlook folder from the prompt dialog. And then click the button 'Confirm & Add' to add in the monitored lists grid. You can then select to which SharePoint list you like the Outlook items of this folder to publish 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 and rapidly re-arrange Outlook items in any folder. Views can also be organized to group and filter items 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. These views 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 is 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.

ID	From	Subject	List Name	Site	Received
Date: Older					
60	Lisa Bub	Submit Button & TWA Issues	Mails	http://bytepad/Helpdesk	Sat 2/12/2011 6:
55	Becca	I broke it.	Issue Tracking	http://bytepad/Helpdesk	Sat 2/12/2011 3:
54	Hanke-Gyblin...	AW: Question Team Helpdes...	Issue Tracking	http://bytepad/Helpdesk	Fri 2/11/2011 8:0
53	Bob Clift	Attachment Manager	Issue Tracking	http://bytepad/Helpdesk	Wed 7/28/2010 8
5	Sharon Elmes	Invoice Details Required	Sales 2011	http://bytepad/Sales	Tue 7/27/2010 2:
4	Ben Nel	RE: Outlook database exporter	Sales 2011	http://bytepad/Sales	Mon 7/26/2010 4
3	Andrew Whee...	Screen shot	Sales 2011	http://bytepad/Sales	Tue 7/6/2010 11:
2	info@assistm...	New Enquiry Submitted from...	Sales 2011	http://bytepad/Sales	Tue 6/29/2010 10
3	Lynn Nuckols	Document Exporter	Tasks	http://bytepad/Sales	Fri 6/25/2010 1:5
2	Dan Tang	Fw: New Support Request: S...	Tasks	http://bytepad/Sales	Wed 6/23/2010 :
1	Upload.com	How will you get ahead?	Tasks	http://bytepad/Sales	Wed 6/23/2010 :



**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	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	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	From	Subject	List Name	Received
Site: http://bytepad/Helpdesk (4 items)				
60	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

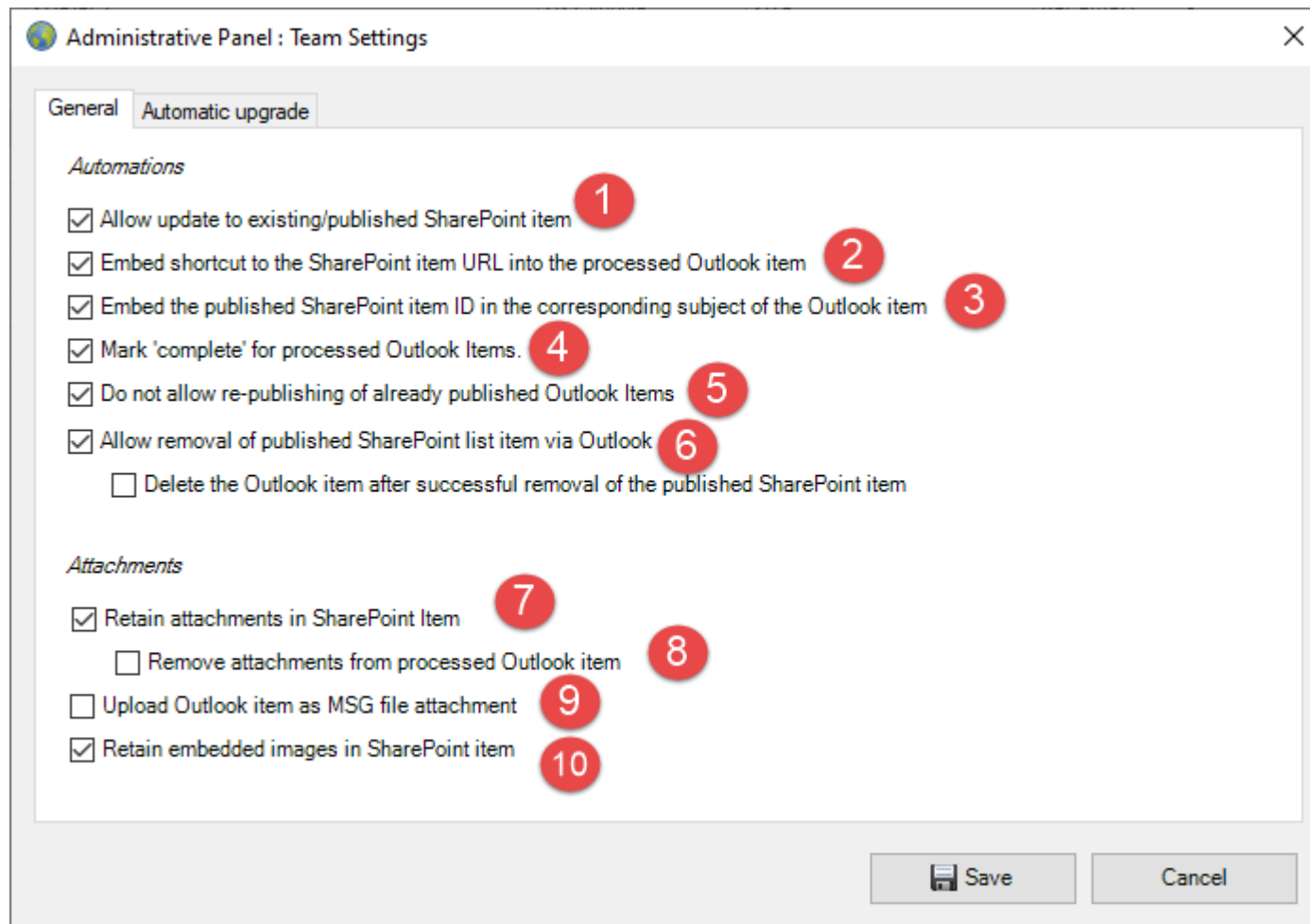
**View 4 – Items grouped by SharePoint Site and List**

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	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

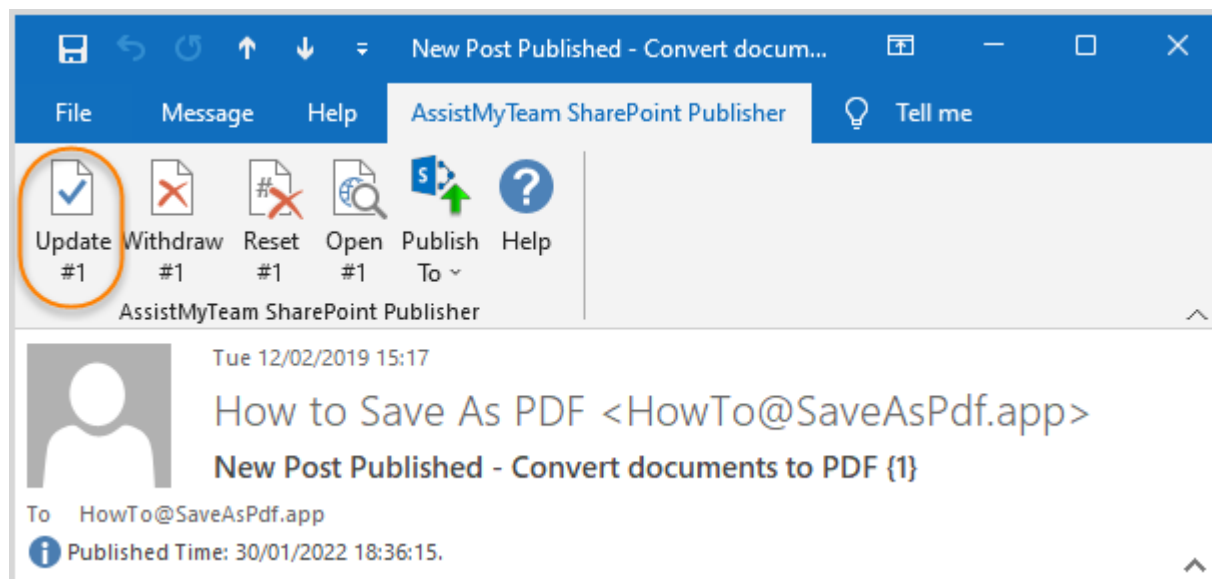
## 12. Settings

Administrator can also control and streamline the behavior on how all members publish contents from Outlook to SharePoint, with these settings (**Team Settings > Advanced Options**)



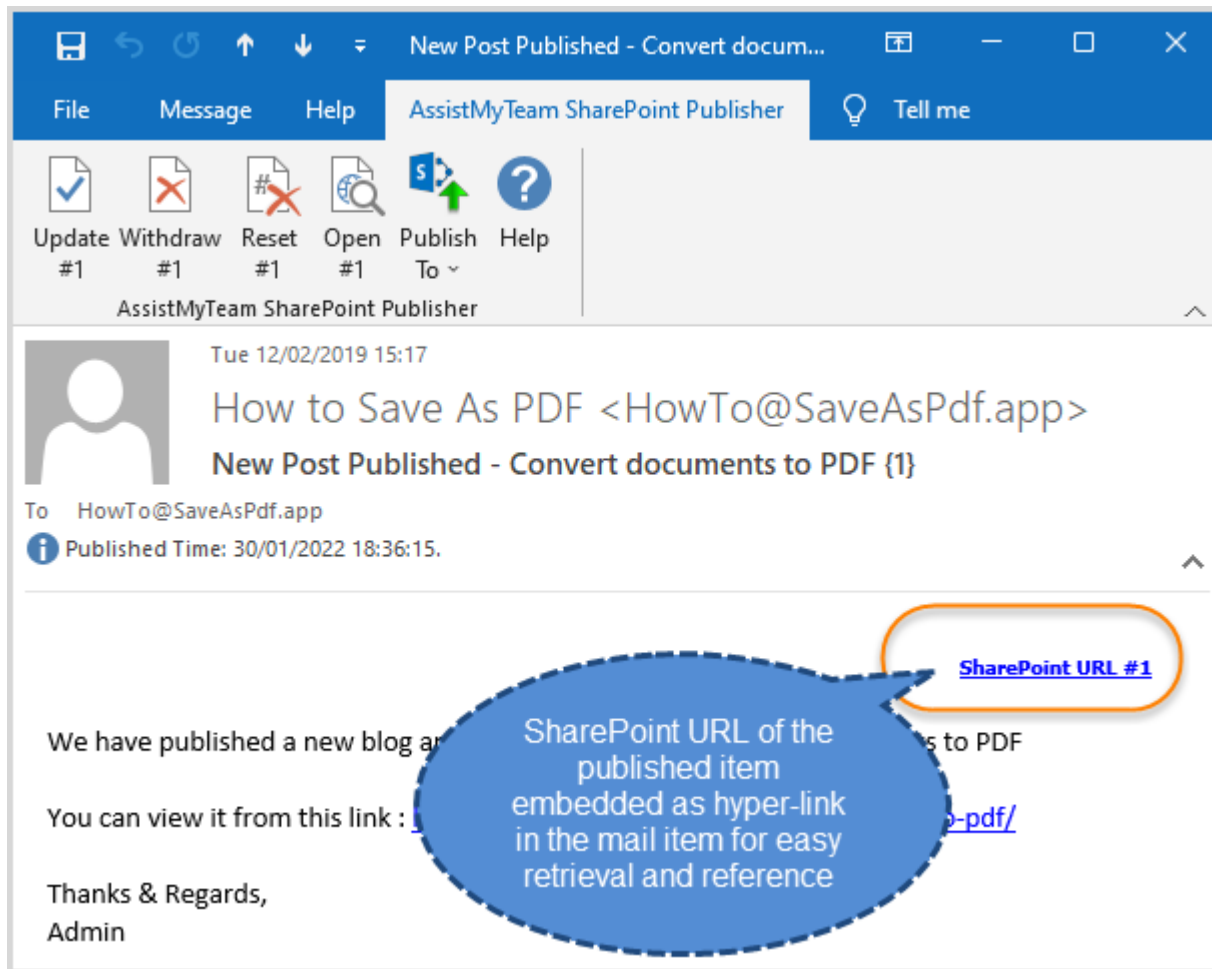
**1**

**Allow update to existing/published SharePoint item** - When enabled, you can perform update and revision to an already published SharePoint item from the corresponding Outlook item. If you open a processed (published) Outlook item, you will see that there is a button option '**Update #ID**', clicking which will update the corresponding SharePoint list item, and any new changes done on the Outlook item, would be reflected in the SharePoint copy too. This process helps in keeping the published items in both your Outlook and SharePoint in sync.



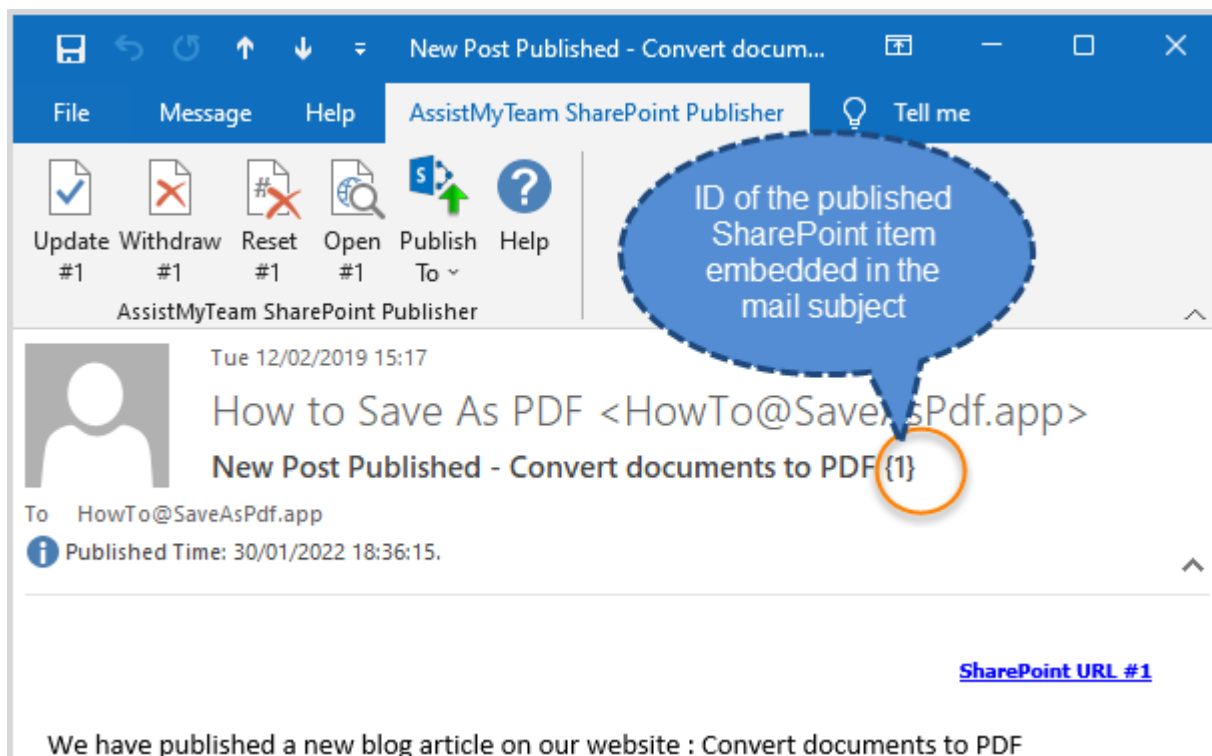
2

**Embed shortcut to SharePoint item URL into processed Outlook item** – If enabled, SharePoint Publisher will insert an URL hyperlink of the SharePoint list item to the Outlook item that was just published. Clicking this hyperlink will open the corresponding SharePoint item in your web browser.



3

**Embed the published SharePoint item ID in the corresponding subject of the Outlook item** – If enabled, SharePoint Publisher will embed the SharePoint item ID in the subject of the Outlook item (within curly bracket) from which it was published. E.g., {1}.

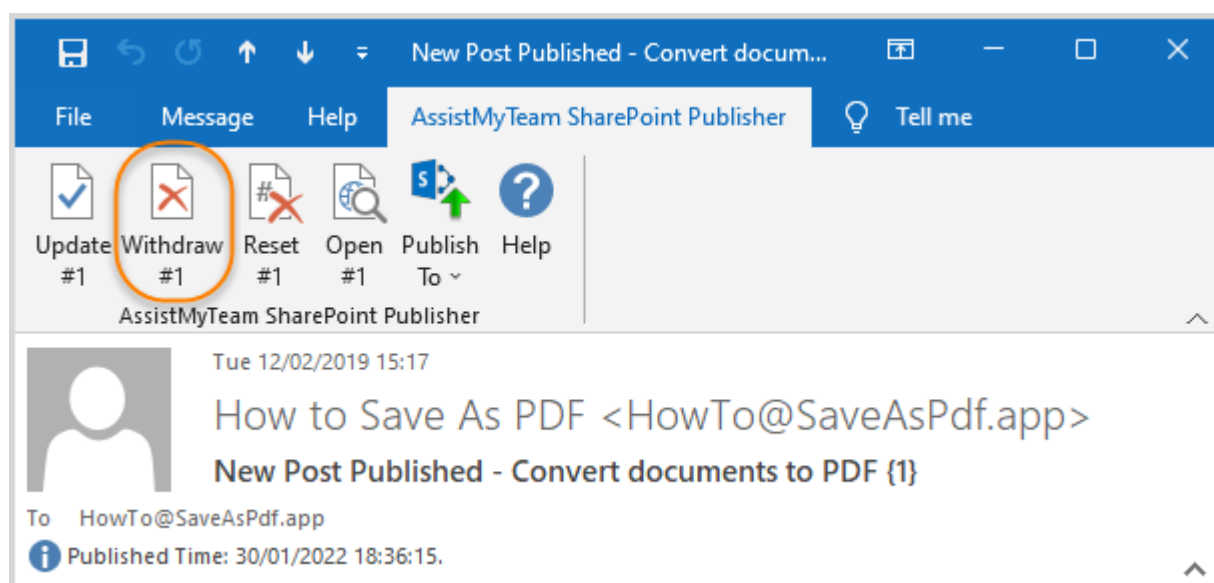


- 4 Mark 'Complete' for processed Outlook Items** – If enabled, the add-in will flag the processed Outlook items (i.e., published to SharePoint) a complete. Such items in Outlook will appear as 'tick' under Flag Column.

!	SUBJECT	RECEIVED	SIZE	CATEGORIES	
▲ Date: Older					
	Add a foolproof security plan to your site — for free.	Wed 13/02/2019 1...	76 KB	<input type="checkbox"/>	▶
	New Post Published - Protect PDF with Password	Wed 13/02/2019 0...	10 KB	<input type="checkbox"/>	▶
	New Post Published - Convert documents to PDF {1}	Tue 12/02/2019 15:...	47 KB	<input checked="" type="checkbox"/>	▶
	New Post Published - Archiving business documents and emails t...	Sun 10/02/2019 20:...	11 KB	<input type="checkbox"/>	▶
	[How to Save As PDF] Please moderate: "Archiving business docu...	Sun 10/02/2019 19:...	10 KB	<input type="checkbox"/>	▶

- 5 Do not allow re-publishing of already published Outlook items** – If enabled, the add-in will not show the 'Update' button in the toolbar for those Outlook item that were already published to SharePoint previously. This mean, the user can't make changes to the Outlook item and update the changes back to the corresponding item in SharePoint.

- 6 Allow removal of published SharePoint list item via Outlook** - When this option is enabled, you can remove the published list item in SharePoint from the corresponding Outlook item. If you open a processed/published Outlook item, you will see a new button option '**Withdraw #ID**' in the SharePoint Publisher toolbar or ribbon in Outlook. Clicking which will connect to SharePoint and remove the list item with the particular ID from SharePoint. This action will also reset the Outlook item and any references to the SharePoint item will be removed. In short, it will be ready for publishing to the same or another SharePoint list.



**Delete the Outlook item after successful removal of the published SharePoint item** – If this option is enabled, SharePoint Publisher will also delete the Outlook item after the corresponding SharePoint item was removed.

- 7 Retain attachments in SharePoint item** - If enabled, SharePoint Publisher will also upload the associated attachments from Outlook to SharePoint. And the attachments will appear as hyperlinks at the bottom of the SharePoint list item.

	Lisa
Jnread	No
Companies	
Categories	
Priority	Normal
Billing Information	
Attachments	<a href="#">CaseStudyHMO.pdf</a> <a href="#">AddressEntryProperties.docx</a> <a href="#">image003.jpg</a> <a href="#">image001.jpg</a> <a href="#">image002.jpg</a>

**Attachments are uploaded automatically to SharePoint, and can be easily retrieved from these links**



8

**Remove attachments from processed Outlook item** – if enabled, SharePoint Publisher will delete the attachments from the particular Outlook item that was just successfully published to SharePoint. This action is ignored, if the 'Retain attachments in SharePoint item' option was disabled.

9

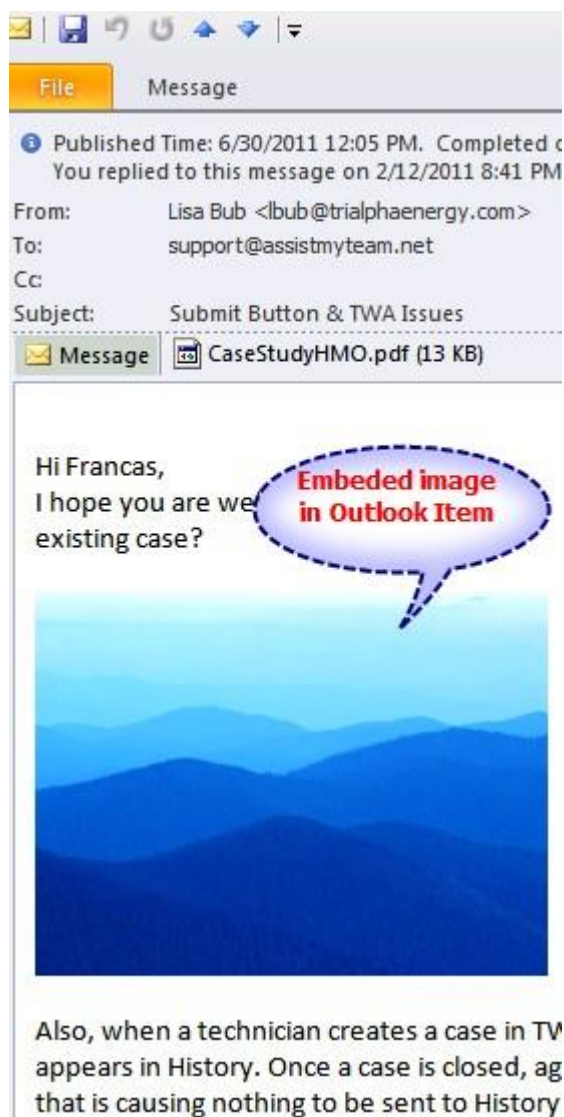
**Upload Outlook item as MSG file attachment** - If this is enabled, SharePoint Publisher will generate an MSG file format of the Outlook item, and will be uploaded as attachments to the published SharePoint list item.

Companies	
Categories	
Priority	Normal
Billing Information	
Attachments	<a href="#">CaseStudyHMO.pdf</a> <a href="#">image002.jpg</a> <a href="#">AddressEntryProperties.docx</a> <a href="#">OutlookItem.msg</a> <a href="#">image001.jpg</a> <a href="#">image003.jpg</a>

10

**Retain embedded images in SharePoint item** – If this is enabled, any embedded or inline images that may exist in the Outlook item, will also be retained in the published SharePoint list item.

*In Outlook Item:*



*In SharePoint list item:*





## 13. 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 Admin**' or '**AssistMyTeam SharePoint Publisher User**' and click '**Uninstall**'.

**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.



## 14. Important Links

### [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.