

SharePoint and Outlook uploader tool

Features summary and user guide



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Table of Contents

1. Features summary	4
1.1 Features	4
1.2 Caching	6
1.3 Offline working	6

1. Features summary

1.1 Features

- Show / hide the SPS Upload window by clicking on the 'SPS Upload' button in your Outlook toolbar.
- You can work with multiple portals or team sites by adding them with the 'Setup portals and sites' dialog (displayed when the component is first loaded, or accessed from the 'button' menu at the bottom of the dialog). If you are working with more than one, a dropdown menu is displayed allowing you to switch between them.
- Can display sites and areas from SPS in the following views:
 - **MySite** – shows a hierarchical view of the document libraries in your MySite and of any sub-sites, if you have any.
 - **Portal Home** – shows a hierarchical view that starts with the Portal Home Area and allows you to browse all sub-areas that you have access to and their document libraries.
 - **Top Level Sites** – displays all the 'top-level' team sites (WSS sites) that you have access to, i.e. all the WSS sites that aren't sub-sites of another WSS site.
 - **My Links** – displays the 'My Links' from your MySite. You can use this to easily maintain a list of your most commonly used areas, sites and document libraries so that you don't have to browse for them each time.
- Allows you to *copy*, or *move*, e-mails to Document Libraries. Once you have located your document library in the upload window, drag an e-mail onto it to copy it to that location. Hold down the 'Shift' key if you want to move it there. Hold down the 'Alt' key if you want to type in a name for the e-mail rather than use the subject as the name for the e-mail file.
- You can search for sites, areas and document libraries using the search box. Type in a piece of text to look for in their titles and click the 'Search' button. This will display all the matching areas and sites and let you drill down through them.
- You can open up some advanced search options by clicking the 'More' text next to the search button. These allow you to choose the type of object you are searching for:
 - Portal Areas
 - Top Level Sites
 - Subsites (sometimes called webs)
 - Document Libraries
- In views other than 'my links', you can 'add to my links' from the context menu for an item in the tree view. This lets you add a link, in much the same way you could from MySite, but without having to go there.
- In the 'my links' view, you can remove links using the 'remove link' option on the context menu for each link.

- Items in the tree view can be viewed in the normal way with Internet Explorer by using the 'view in browser' context menu option.
- Folders can be created, deleted or renamed inside document libraries by right clicking on a folder or document library and choosing the appropriate menu option.
- All information retrieved from the server is cached locally. This is to reduce server load and speed up response times in normal use. It also allows for offline usage (see point d below). Sometimes however it can be confusing – if your view of information on the server seems out of date or wrong in some way, have a look at 'caching' below.
- You can still upload e-mails while offline! The SPS Uploader detects whether you are offline by reading Outlook's online/offline status. Any e-mails you drag onto document libraries will be stored locally in a queue until you next go online. It will detect when you change Outlook's status to 'online' and begin uploading the e-mails. See 'offline working' for more.

If you do a move, and subsequently the e-mail cannot be uploaded (e.g. the document library you selected no longer exists), it will prompt you to save the e-mail to disk (if you want to you can then drag it back into Outlook from there). In that scenario refusing to save an e-mail will mean it saves it onto your desktop.

- Holding down the 'alt' key while you drag an e-mail to a document library or folder will pop-up a window for you to type in the desired name of the e-mail once uploaded (the default name is based on the e-mail subject with illegal characters replaced with underscores).
- It won't automatically overwrite files or e-mails already in your document library – if one exists with the same name it will prompt you for whether to overwrite the document or change the name, or cancel the upload.
- It will save your last used view and position on exiting Outlook, so when you reload Outlook it should come back just as you left it.
- You can change the following settings from options on the 'button menu' at the bottom of the dialog:
 - Portals and sites you are working with.
 - Length of time items are cached for before being considered out of date (default is one hour).
 - Credentials used to authenticate to the server – generally you shouldn't need to change these, but useful in a situation where you're working against a demo or dev environment not in the same domain, or in an extranet scenario when you're not logged onto the domain.
 - Whether to append a serial to the name when uploading an e-mail and one with the same name exists at the target location, or whether to prompt to do one of overwrite, choose a new name, or cancel.

1.2 Caching

All information retrieved from the server is cached locally – this is a good thing as it makes everything faster and more responsive, and allows offline usage.

However, this does also mean that your locally cached information may sometimes be out of date – i.e. if someone adds or deletes a document library, area or site, that change won't be immediately reflected in your view. To get around this, data is not cached for more than one hour, unless you are offline.

If you want to force a part of your view to refresh immediately, you can right click on it and choose 'refresh'. This will immediately clear the cache for that part of the view and re-retrieve its data. To clear ALL information from your local cache, click on the 'dropdown menu button' in the bottom left of the window, and choose 'clear cache'.

1.3 Offline working

You can still upload e-mails while offline! The SPS Uploader detects whether you are offline by reading Outlook's online/offline status. Any e-mails you drag onto document libraries will be stored locally in a queue until you next go online. It will detect when you change Outlook's status to 'online' and begin uploading the e-mails.

In order for the program to work offline, it has to have recorded the necessary information while you were online. Because of the caching behaviour, any document libraries you have visited online will be available (unless you have cleared the cache). If you want to explicitly cache a large part of your portal, you can do this by right-clicking on the parent node of the part of the structure you want to cache, and choosing 'cache for offline access'. This will read and cache all the data for that node and its children (note – any data already cached will be reused, this operation does not clear the cache for that information).

If you do a move, and subsequently the e-mail cannot be uploaded (e.g. the document library you selected no longer exists), it will prompt you to save the e-mail to disk (if you want to you can then drag it back into Outlook from there). In that scenario refusing to save an e-mail will mean it saves it onto your desktop.