

Seagate Info

The Info Desktop for Outlook

Overview

With the Seagate Info extension for Microsoft Outlook, users can employ the Outlook Client as an Info Desktop. Users will be able to connect to Info APS machines and have the information from these displayed within the Outlook environment. Users will be able to select report, query, and Info OLAP cube instances from Outlook's Messages pane and launch these in the appropriate viewer directly from Outlook.

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System Requirements

Info Outlook Server

- 10MB of RAM
- 20MB free disk space for install
- 20MB free disk space on Exchange Server for storing client install programs (only if the Exchange Server connection method is used)

Info Desktop for Outlook

- 3MB RAM for folders in Outlook + 7MB when viewing a report
- Disk space: 1.3MB + 7MB (if Info Worksheet is installed) + 10MB (if Info Analyzer is installed) + 0.5 MB for each set of folders

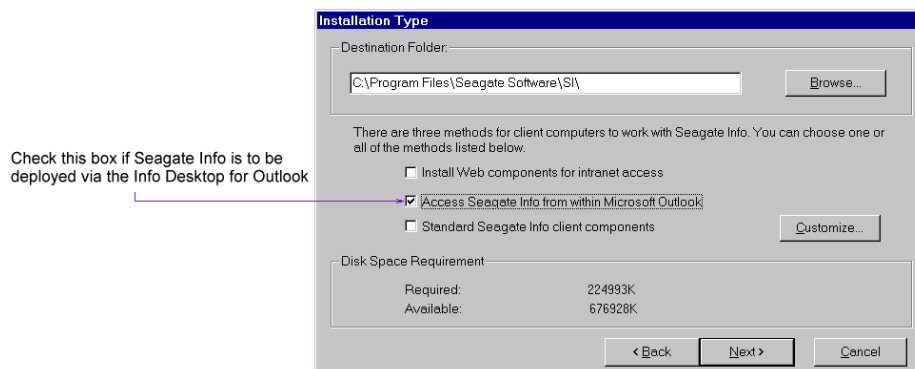
Communications Overview

Info Desktop for Outlook clients will be able to communicate with the server either through the Exchange Server public folders or through TCP/IP. When communicating through the Exchange Server public folders, the Info Desktop for Outlook puts two "posts" into the specified public folder on the Exchange Server. These posts are then edited and polled as the Info Outlook Server communicates with the Info APS and Info Desktop for Outlook.

When communicating through TCP/IP, the Info Desktop for Outlook connects to the Info Outlook Server with a stream. All communication between the client and server occurs through the stream and no information is sent through the Exchange Server.

Setting Up

Users who intend to use the Info Outlook Server will need to select the corresponding option during the Seagate Info 7 install:

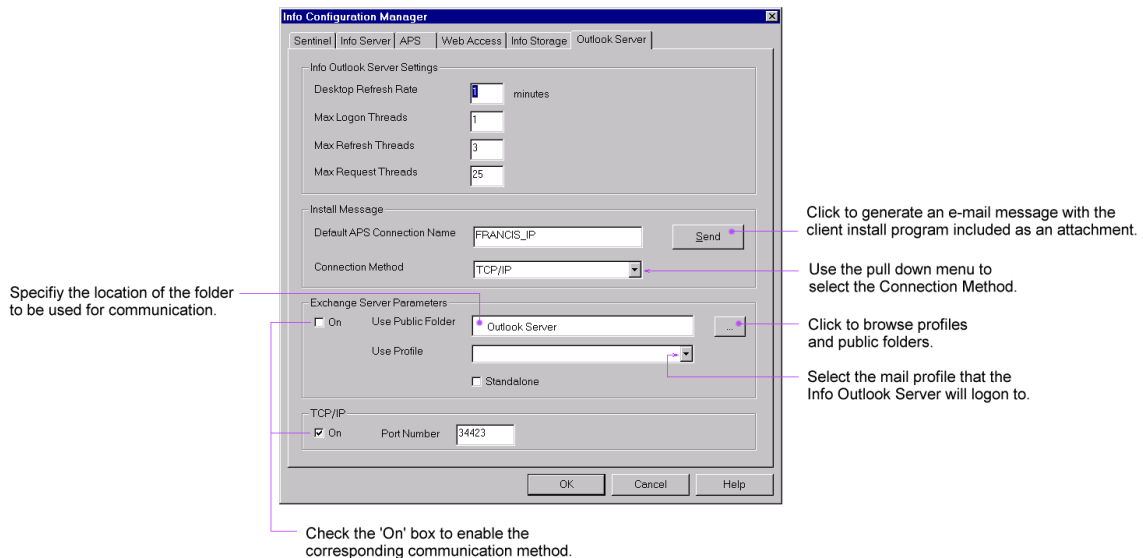


Preparing for Configuration: Exchange Server Communications

In order to use the Exchange Server public folders for communication between the Info Outlook Server and Outlook clients, the Info Outlook Server must be the owner of the public folder that is used for communication (This folder should be non-replicated). In order to use the folder, the Info Outlook Server must log on to mail, and as such, a mail profile must be available. Two things then, must be set up prior to configuring the Info Outlook Server: a mail account and a public folder that is owned by that mail account.

Configuration

To configure the Info Outlook Server, start the Info Configuration Manager and navigate to the Outlook Server Tab:



Administrators will need to assign their Outlook Server Settings, specify the connection method to be used, and send the client installation to their intended users.

Info Outlook Server Settings

A number of parameters can be set via the Info Outlook Server Settings group.

- The Desktop Refresh Rate for the Info Desktop for Outlook clients controls how often the desktop information is updated in minutes.
- Administrators can specify the maximum number of Logon, Refresh, and Request threads. Note that as a multi-threaded application, the Info Outlook Server is suitable for multi-processor machines.

Connection Method

The Info Outlook Server can serve clients via Exchange Server and TCP/IP simultaneously, Exchange Server only, or TCP/IP only, depending on the desired configuration. (The 'On' check boxes in the lower two frames are used to turn on the communication method specified in each pane).

With TCP/IP turned ON, clients will be able to download components (Java Plug-In, Info Worksheet, Info Analyzer) from the server machine directly instead of using the Exchange Server public folders.

Note that with the Exchange Server connection method, user limitations of the Info Outlook Server are directly related to the limitations of the involved Exchange Server. In general, when using the TCP/IP connection method, the Info Outlook Server can support more users than it could by using the Exchange Server method.

Setting the Exchange Server Connection Method

In the Exchange Server Parameters group, type in the name of the public folder that you want to use for communication. Use '\' to separate names in the folder hierarchy. (If running the Info Outlook Server in standalone mode then instead of using the public folders the Outlook Server and Info Desktop for Outlook Client will use the local folders. This feature is for backward compatibility and was intended solely for demonstrating the Info Desktop for Outlook when the Exchange Server was not accessible. Selecting the 'Standalone' check box will turn it on).

Next, select the mail profile that the Info Outlook Server will use in the "Use Profile" combo box. (If you did not set up a mail profile, you can click the "..." button and create a new one).

Setting TCP/IP Connection Method

Specify the TCP/IP Port Number. As with all applications that accept TCP/IP connections, a unique port number must be assigned to the Info Outlook Server. Setting the Info Outlook Server to use a port number in use by another application will result in unpredictable results. If you change the port number then all current TCP/IP type clients must reinstall the Info Desktop for Outlook in order to connect to the server again.

Starting the Server

After you have set up the server, click "OK". Users will be warned that the server must be restarted (if it is already running) in order for the changes to take affect.

The Info Outlook Server can be started as a process from the Seagate Info 7 NT program group or as a service. Once you restart the Info Outlook Server, there may be a delay as it will initialize the public folder with data and the correct permissions for itself and clients (only if the Exchange Server communication method is turned on).

Client Install Message

Administrators can set up clients by sending them the install message from the Outlook Server Tab in the Info Configuration Manager. The install message contains a program which, when run, will install the Info Desktop for Outlook on the client's machine. The client must know their Seagate Info user name and password in order to complete the install.

In order to send the message, start the Info Configuration Manager if it is not already running. In the Install Message group of the Outlook Server Tab, type in the name of the APS that you want the users to be able to connect to. Then use the drop down menu in the 'Install Message' pane to specify the connection method to be used by clients.

Note: The connection method used by the Info Desktop for Outlook client is determined when sending the install message to the client. Administrators who want to switch clients from the Exchange Server connection method to the TCP/IP connection method can simply send them an install message specifying the TCP/IP connection method. This will update all connections that the client has to the specified APS (instead of adding new connections).

After you specify the clients APS and Connection method, click the "Send" button. You will be presented with a new mail message containing an attachment that is the install program for the Info Desktop for Outlook. Send the mail to whomever you want to use the system.

General Considerations

Multiple Exchange Servers

If multiple Exchange Servers are used, administrators will have to run one Info Outlook Server for every Exchange Server. It is not recommended that the Exchange public folder be replicated across Exchange Servers. Another option is to move all of the user accounts that will be using the Info Outlook Desktop to a single Exchange Server and run only one Info Outlook Server. Of course if the clients connect using TCP/IP there need be no concern about the Exchange Server public folders.

Performance

For optimal performance with the Exchange server connection method, the Info Outlook Server should be run on the Exchange Server. If using the TCP/IP connection method, being 'closer' to the Info APS will improve performance since all calls must be directed there.

User Rights for Exchange Server Connection Method

All users will need the following rights to the public folder that the Outlook Server will use:

- Create and read items.
- Edit and delete own items

The account that the Info Outlook Server is using should be the owner of the public folder. (If the Info Outlook Server is the owner of the public folder, it will set all the rights).

Running the Info Outlook Server as an NT Service

The Info Outlook Server can be run as an NT service. As a service, if the Exchange Server connection method is being used, it must be run under a user account that is a member of the NT Administrators group on the machine configured to use Outlook/Exchange. The Info Outlook Server is also dependent on the Info Sentinel service. The Info Sentinel must be run under a user account.

As a general rule, if only the TCP/IP connection method is on, users do not need to be concerned with the Exchange Server because it will not be used by the Info Outlook Server or the Info Desktop for Outlook.

Note: The Info Outlook Server writes error messages to the Event Log even when not running as a service.

Step-by-Step Instructions

Production Version

Preliminaries:

If using the Exchange Server Connection method:

- i. Obtain an Exchange mail account for the Info Outlook Server.
- ii. Create a public folder that is owned by the mail account from step (i).

1. Install the Info Outlook Server and the Info Sentinel on a machine.
2. Start the Info Configuration Manager and navigate to the Outlook Server Tab.
3. Specify the required parameters for the connection method to be used:

For the Exchange Server Connection method:

- i. Fill in the name of the public folder from step (ii) in the “Exchange Server Parameters” panel in the “Use Public Folder” textbox. Separate sub folder names with ‘\’ (e.g. – “Outlook Server\MyIOS”).
- ii. Select a profile that logs on to the mail user from step (i). Use the “Use Profile” selection list.
- iii. Select the corresponding OK check box.

For the TCP/IP Connection method:

- i. Specify the port number to be used.
- ii. Select the corresponding OK check box.

4. Click OK and start the Info Outlook server for the changes to take affect.
5. Re-enter the Info Configuration Manager.
6. In the “Install Message” panel, type in the name of your APS into the “Default APS Connection name” textbox.

7. Specify the connection method to be used by the clients by using the corresponding drop down menu.
8. Press "Send".
9. Send the message to the clients.
10. Now each client must run the install program they get in the mail and type in their Seagate Info user name and password.

Standalone Version

1. Start Info Configuration Manager from the Seagate Info 7 program group. In the Install Message group, type in the name of the APS you want to connect to.
2. Specify the required parameters for the connection method to be used:

For the Exchange Server Connection method:

- i. Select the 'Standalone' check Box.
- ii. Specify the mail profile you want to use with Outlook.
- iii. Select the corresponding 'OK' check box.

For the TCP/IP Connection method:

- i. Specify the port number to be used.
- ii. Select the corresponding 'OK' check box.

3. Click OK and start the Info Outlook Server.
4. Re-enter the Info Configuration Manager and press "Send Install Message" button.
5. Send the mail to yourself.
6. Leave the server running. The server must be running before you try to connect using Outlook.

- **In Outlook**

7. Start Outlook. It can already be running too.
8. Run the setup program attachment in the mail you just sent yourself.
9. Type in the User name and password for the APS you connected to.
10. In Outlook, click on the "Seagate Info" folders and you should be connected.

Contacting Crystal Decisions for Technical Support

We recommend that you refer to the product documentation and that you visit our Technical Support web site for more resources.

Self-serve Support:

<http://support.crystaldecisions.com/>

Email Support:

<http://support.crystaldecisions.com/support/answers.asp>

Telephone Support:

<http://www.crystaldecisions.com/contact/support.asp>