
Installation Help for the TeamConnect Office and Outlook Plugins

The guide details the prerequisites, system requirements, and step-by-step installation instructions, and troubleshooting for the TeamConnect Office and Outlook plugins.

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Introduction

The information and instructions on this page apply to version 2.X of TeamConnect Office Suite.

TeamConnect Office integrates into Microsoft Word, Excel, and PowerPoint.

TeamConnect Outlook integrates with Microsoft Outlook.

You must install each add-in separately

- First, you have to install the TeamConnect Plugin Module,
- Then, you install the Office Plugin,
- Lastly, you install the Outlook Plugin.

Performance Note:

Performance will vary depending on the number of integrated search views and the number of projects returned by those search views. Testing of Office Suite 2.0 indicates the following results

- An environment with 23 integrated search views can be initialized in 5 seconds.
- An environment with 54 integrated search views can be initialized in 11 seconds.

These numbers might be affected by other factors such as PC configuration (RAM, CPU, etc.) as well as the network limitations (speed, latency, etc.).



Prerequisites and System Requirements

Prerequisites

- Users must have *Administrative Access* within the TeamConnect system in order to successfully install.
- Admins must enable the following permissions (in TeamConnect) for users and groups for Office Suite **2.0** to function:
 - View Office Integration Settings Records
 - View Office Integration Settings all categories
 - View Office Integration Settings all custom fields

System Requirements

- Must be able to run installer as an administrator
- TeamConnect Enterprise 3.3 SP2 or later
- IMAP, POP3, or Google Sync
- **For TeamConnect Office:** Microsoft Word, Excel, and PowerPoint 2007, 2010, 2013, and 2016
- **For TeamConnect Outlook:** Microsoft Outlook 2007, 2010, 2013, and 2016.
- Prior to moving to Office Suite **2.X**, users with the following versions of TeamConnect must download the respective patches or updates listed below:

Version	Patch
TC 3.3 SP2	TeamConnect 3.3 SP2 Office Suite 2.1
TeamConnect 3.3 SP3	TeamConnect 3.3 SP3 Office Suite 2.1
TeamConnect 3.4	TeamConnect 3.4 Office Suite 2.1
TeamConnect 3.4 SP1	TeamConnect 3.4 SP1 Office Suite 2.1 TeamConnect 3.4 SP1 Update 20 Patch 11
TeamConnect 4.0	TeamConnect 4.0 Office Suite 2.1 TeamConnect 4.0.10 Patch 3
TeamConnect 5.0	TeamConnect Office Suite 2.1

Upgrade Considerations:

TeamConnect Office Suite 2.1.2.3 can be upgraded from any 2.1 version of TeamConnect Office Suite.

Users with versions **prior to 2.1** must first upgrade through the 2.1 installer on the Available Updates in TeamConnect.



Users upgrading to Office Suite 2.1.2.3 from a version before Office Suite 2.1.0.1 must sync for pre-existing document to show up in searches. For more detail, please see Search Filtering in the Office Suite User Guide.

Installing the TeamConnect Plugins

1. Go to **Available Updates**, click the **Install Now** button.
 - You should receive an "Installation Successful" message.
 - If the installation is unsuccessful you will be redirected to the `/fatalError.jsp` page. **DON'T PANIC, YOU WILL BE ALRIGHT.**
2. After a successful installation, you won't be able to see anything in TeamConnect because you will not have the correct rights.
3. All users wanting to connect to the Office Suite have to have the following rights:
 - a) View Office Integration Settings records
 - b) View Office Integration Settings all categories
 - c) View Office Integration Settings all custom fields
4. After you give yourself rights, you will need to access the Office Integration Settings object in the UI and click Save. There was literally no way at all we could automate this or have a default copy of the settings be created during installation so please don't ask.
5. After the module is installed in TeamConnect, you can download the plugin installers on the Available Updates page.

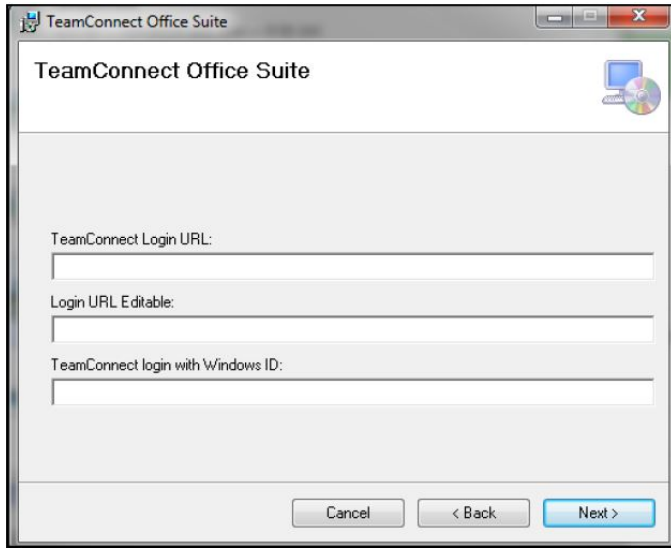
Installing the Office Plugin

1. Select the appropriate x86 or x64 installer based on your version of Office.
 - **x86** is used for 32-bit Office
 - **x64** is used for 64-bit Office

Note: This is not based on your version of the Windows Operating System.
To find what version of Office you have, go to **File > Account > About Word**. You can check any Microsoft Office system, it doesn't have to be Word (e.g. PowerPoint, Excel, etc.)
2. In the `\\TeamConnect Office Add-ins\Office\lx86 - For 32-bit Office installs`, right-click the **setup.exe** file and select **Run as Administrator**. The plugin will not install correctly if you do not run as admin.
 - **Note:** *This is the recommended file to run regardless of if you have a 32- or a 64-bit machine*
3. Follow the steps in the Wizard to complete the install.
4. Click **Next** from the *Mitratech TeamConnect Outlook Add-in* window.
5. If you want to change the location of where this is stored, click the **Browse** button. Otherwise click the **Next** button to use the default folder.
6. From the *Mitratech Setup* window, enter the URL for your instance of TeamConnect.
Be sure to include **http://** at the beginning of the URL, and a **/** at the end of the URL (e.g. <http://testsite:1234/4.0.2/>).



Note: If you want to preset the login URL for your users, enter "false" in the URL editable entry field. This will ensure that users cannot edit the log-in URL. Entering "false" will not work if there is no log-in URL. Enter "true" if you would like to make the URL editable. All fields left blank will default to "true."



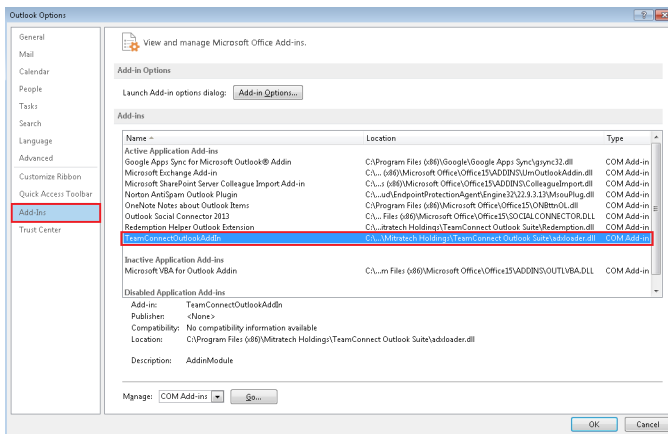
7. Click **Next** to begin the installation.
8. Click **Next** from the *Mitratech Setup* window.
9. Click **Close** to exit the installer.

After successful installation, the **TeamConnect tab** appears in **Microsoft Word, Excel, and PowerPoint**.

Confirm that the plugin was installed successfully

Once the add-ins are installed, open *Office* and/or *Outlook* and verify you can see the TeamConnect Plugin pane. If **you cannot** see the pane on the right hand side, then you may need to confirm the add-in is enabled:

1. Under **File > Options > Add-ins > click "Go..."**
 - next to "**Manage: COM Add-ins,**" verify the check box is checked for "**TeamConnectOfficeAddIn**"



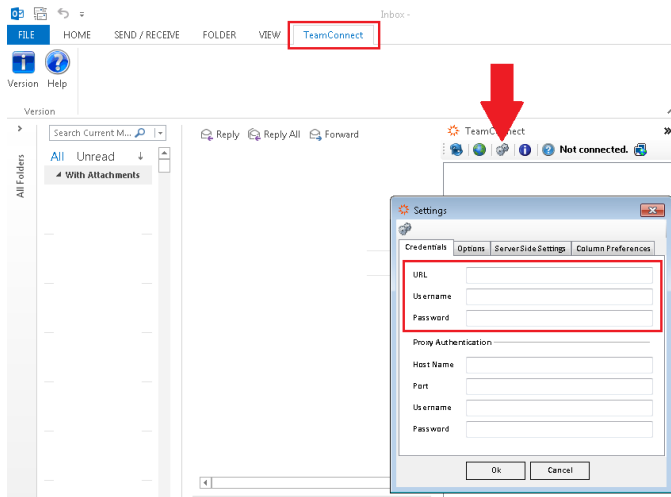
2. Once you have confirmed that the plug-in is enabled in Office/Outlook, if the pane is still not showing, then check the **.ini file** for the user on the machine to verify that the views are enabled.

- C:\Users<user name>\AppData\Roaming\Mitratech\Office Settings\OfficeSettings.ini
 - **Note:** you may need to set Windows Explorer to show hidden items, in Windows X, this is done by going to **View > checking the 'hidden items' box**
- If the boolean is set to "True," then it will be visible within Outlook.

```
[Column1settings] ←
TEXT=File Name
WIDTH=60
VISIBLE=True
DISPLAYINDEX=0
[Column2settings]
TEXT=Author
WIDTH=60
VISIBLE=True
DISPLAYINDEX=1
[Column3settings]
TEXT=Category
WIDTH=60
VISIBLE=True
DISPLAYINDEX=2
[Column4settings]
TEXT=Date Created
WIDTH=60
VISIBLE=True
DISPLAYINDEX=3
[Column5settings]
TEXT=Date Modified
WIDTH=60
VISIBLE=True
DISPLAYINDEX=4
[Column6settings]
TEXT=File Type
WIDTH=60
VISIBLE=True
DISPLAYINDEX=5
[Column7settings]
TEXT=File size
WIDTH=60
VISIBLE=True
DISPLAYINDEX=6
[Column8settings]
TEXT=CC
WIDTH=60
VISIBLE=True
DISPLAYINDEX=7
[Column9settings]
TEXT=To
WIDTH=60
VISIBLE=True
DISPLAYINDEX=8
[Column10settings]
TEXT=Subject
WIDTH=60
VISIBLE=True
DISPLAYINDEX=9
```



3. Once you have the TeamConnect pane visible in Office/Outlook, you can configure the connection to your TeamConnect instance. Open the settings by clicking on the Gear icon on the top of the TeamConnect pane. There will be three fields to fill out.



If you need to change your TeamConnect login information, click the **Settings** button from the TeamConnect pane. Entering your login information allows TeamConnect to integrate with the Office programs.

Installing the Outlook Plugin

1. Select the appropriate x86 or x64 installer based on your version of Office.
 - **x86** is used for 32-bit Office
 - **x64** is used for 64-bit Office

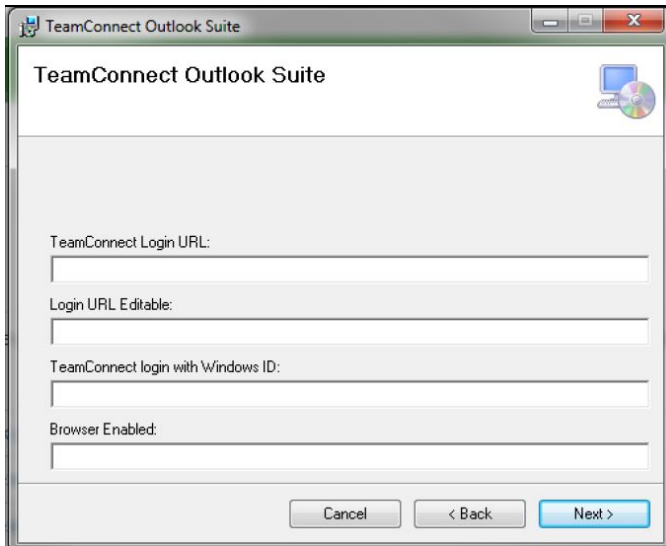
Note: This is not based on your version of the Windows Operating System. To find what version of Office you have, go to **File > Account > About Outlook**.
2. In the `\\TeamConnect Office Add-ins\Outlook\` folder, right-click the **setup.exe** file and select **Run as Administrator**. The plugin will not install correctly if you do not run as admin.
 - **Note:** *This is the recommended file to run regardless of if you have a 32- or a 64-bit machine*
3. Follow the steps in the Wizard to complete the install.
4. Click **Next** from the *Mitratech TeamConnect Outlook Add-in* window.
5. If you want to change the location of where this is stored, click the **Browse** button. Otherwise click the **Next** button to use the default folder.
6. From the *Mitratech Setup* window, enter the URL for your instance of TeamConnect. Be sure to include **http://** at the beginning of the URL, and a **/** at the end of the URL (e.g. <http://testsite:1234/4.0.2/>).

Note: If you want to preset the login URL for your users, enter "false" in the URL editable entry field. This will ensure that users cannot edit the log-in URL. Entering "false" will not work if there is no log-in URL. Enter "true" if you would like to make the URL editable. All fields left blank will default to "true," with the exception of *Browser*



Enabled.

Note: If you want to remove the built-in browser from Outlook, enter "**false**" in the *Browser Enabled* entry field. Enter "true" to leave the browser in the program.



7. Click **Next** to begin the installation.
8. Click **Next** from the *Mitratech Setup* window.
9. Click **Close** to exit the installer.

After successful installation, the **TeamConnect tab** appears in **Outlook**.

If you need to change your TeamConnect login information, click the **Settings** button from the TeamConnect pane. Entering your login information allows TeamConnect to integrate with the Office programs.

Confirm that the plugin was installed successfully [here](#).

[See Troubleshooting help here.](#)

