

# Crestron RoomView® Server Edition Outlook Add-In

Meeting Scheduling Software

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## Installation Guide



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# Meeting Scheduling Software: RoomView® Server Edition Outlook Add-In

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## Introduction

The Crestron RoomView® Server Edition Outlook Add-in adds RoomView's Room Booking Wizard functionality to Microsoft Outlook 2007. This feature will help you find available rooms and resources at the times and places you need them and to set actions and presets for your appointment.

This document is provided as an aid to installing the RoomView Server Edition Outlook Add-In.

## Prerequisites

The Outlook Add-in requires the installation of both the RoomView Outlook Web Service and the RoomView Outlook Add-in. The prerequisites are different for each.

### ***For the RoomView Outlook Web Service***

The RoomView Outlook Web Service requires the following components:

- Windows Server 2003 or Windows Server 2008
- Microsoft .NET Framework 3.5
- Microsoft Exchange 2007
- RoomView Server Edition 7.2.0012.16 or later

### ***For the RoomView Outlook Add-in***

All the software, or software components, in the following list must be installed and available on the client PC. The client PC must also have access to a server running a complete installation of RoomView Server Edition either directly or over a network.

- Windows XP, Vista or Windows 7
- Microsoft Outlook 2007 or a complete installation of Office 2007

If the following are not already present on your system, the Outlook Add-In installer will install them. You will be prompted to accept or reject the installation.

- Microsoft .NET Framework 3.5
- Microsoft Visual Studio Tools for the Microsoft Office system version 3.0
- Windows Installer 3.1

## Rights

Rights to install the Outlook Add-In will depend on your institutions choice of operating systems and security policies.

## Installation

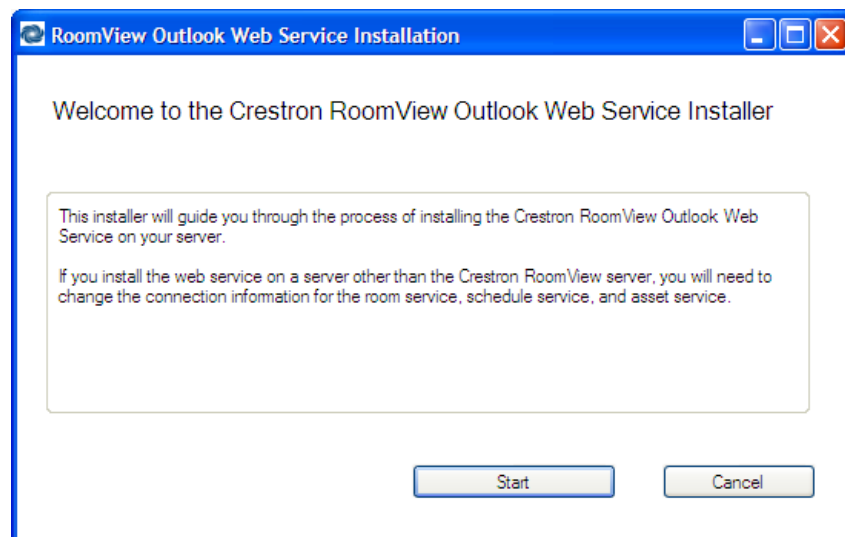
The Outlook Add-In can be installed as a single instance at the PC or deployed to multiple PCs over your network via group policies. Both methods of installation require the Outlook Web Service be installed on the RoomView Server or in a place where the room, schedule and asset services have access to it.

### *Install the Outlook Web Service*

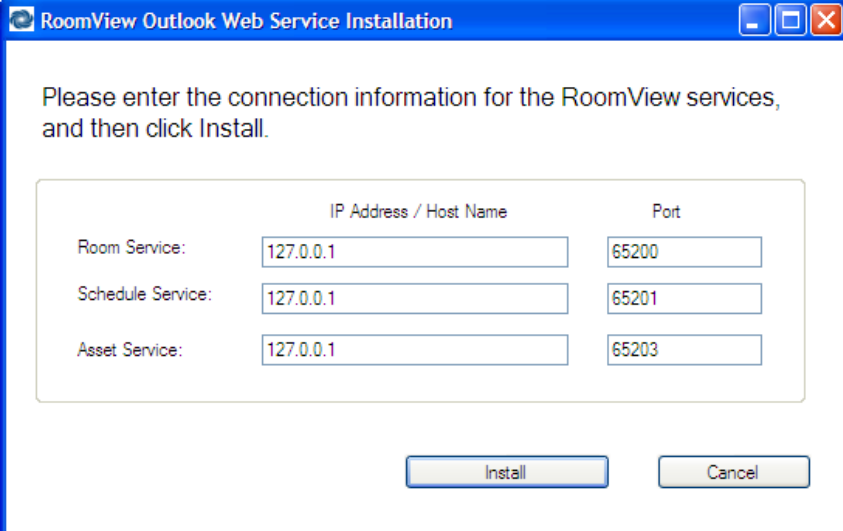
The Outlook Web Service allows you to create and receive meeting information by establishing connections with RoomView's Schedule, Room and Asset services. It should be installed on the RoomView server and can be downloaded from the Crestron website. To install the Outlook Web Service, follow these steps:

1. Once the installer, RoomViewOutlookWebService\_x\_x\_x\_x.exe, has been downloaded to your RoomView server, browse to the download location where you saved it and right click on the installer. Select **Run as Administrator** from the pop-up menu.
2. The "RoomView Outlook Web Service Installation Welcome" window will display.

#### *"RoomView Outlook Web Service Installation Welcome" Window*



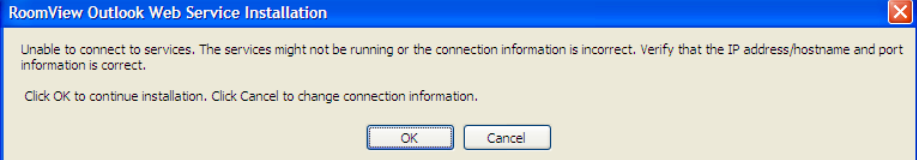
3. Click the **Start** button. The "RoomView Outlook Web Service Connection Information" window will open.

*“RoomView Outlook Web Service Connection Information” Window*

The screenshot shows a Windows-style dialog box titled "RoomView Outlook Web Service Installation". It contains a message: "Please enter the connection information for the RoomView services, and then click Install." Below the message is a table with two columns: "IP Address / Host Name" and "Port". There are three rows of input fields. The first row is for "Room Service:" with IP "127.0.0.1" and Port "65200". The second row is for "Schedule Service:" with IP "127.0.0.1" and Port "65201". The third row is for "Asset Service:" with IP "127.0.0.1" and Port "65203". At the bottom right are "Install" and "Cancel" buttons.

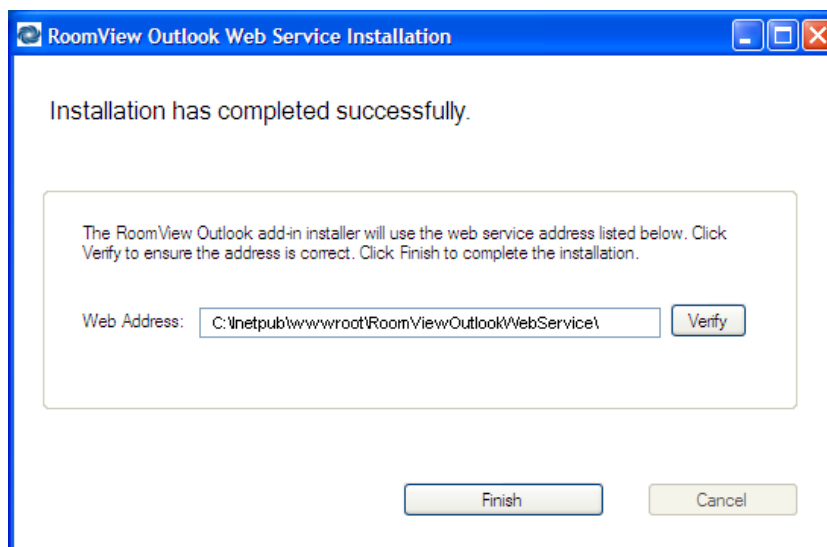
	IP Address / Host Name	Port
Room Service:	127.0.0.1	65200
Schedule Service:	127.0.0.1	65201
Asset Service:	127.0.0.1	65203

4. Accept the default values in the *IP Address/Host Name* and *Port* fields if you are installing the Outlook Web Service on the RoomView server. If you are installing the Outlook Web Service on another server, enter the IP Address or Host Name of the RoomView server.
5. Click the **Install** button. The installer will attempt to verify the addresses and ports of the services entered in the “RoomView Outlook Web Service Connection Information” window. If the installer verifies the connections, the installation will continue without interruption. If it cannot verify the connections the following warning will be displayed.

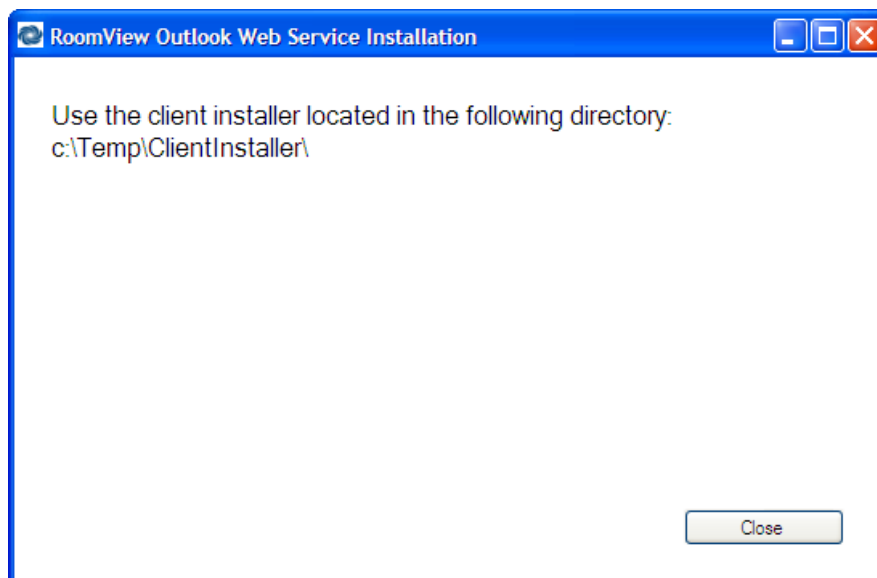
*“RoomView Outlook Web Service Connection Warning” Window*

The screenshot shows a Windows-style dialog box titled "RoomView Outlook Web Service Installation". It contains a message: "Unable to connect to services. The services might not be running or the connection information is incorrect. Verify that the IP address/hostname and port information is correct." Below the message is a smaller message: "Click OK to continue installation. Click Cancel to change connection information." At the bottom right are "OK" and "Cancel" buttons.

6. Click **OK** to continue installation or **Cancel** to return to the “RoomView Outlook Web Service Connection Information” window to validate your connection information.

*“RoomView Outlook Web Service Installation Complete” Window*

7. The “RoomView Outlook Web Service Installation Complete” window will display showing the address of the RoomView Outlook Web Service. Click **Finish** to close.
8. As part of the installation process for the Web Service, an installer for the RoomView Outlook Add-in client has been copied to the location that appears on the “RoomView Outlook Web Service Installation Client Installer Location” window. Make a note of the location.

*“RoomView Outlook Web Service Installation Client Installer Location” Window*

9. Click **Close** to dismiss the window and proceed to the installation of the Outlook Add-in.

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**NOTE:** If RoomView is reinstalled or upgraded, the RoomView Outlook Web Service must be reinstalled.

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### ***Install a Single Instance of the RoomView Outlook Add-In***

To install the RoomView Outlook Add-In, retrieve the client installer from the directory specified in step 8 on page 4.

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**NOTE:** Ensure that Microsoft Outlook is closed before starting the installer. If Outlook is running when you start the installer you will receive a warning. If you proceed with the installation with Outlook running, Outlook will need to be restarted after the Outlook Add-In installation is complete.

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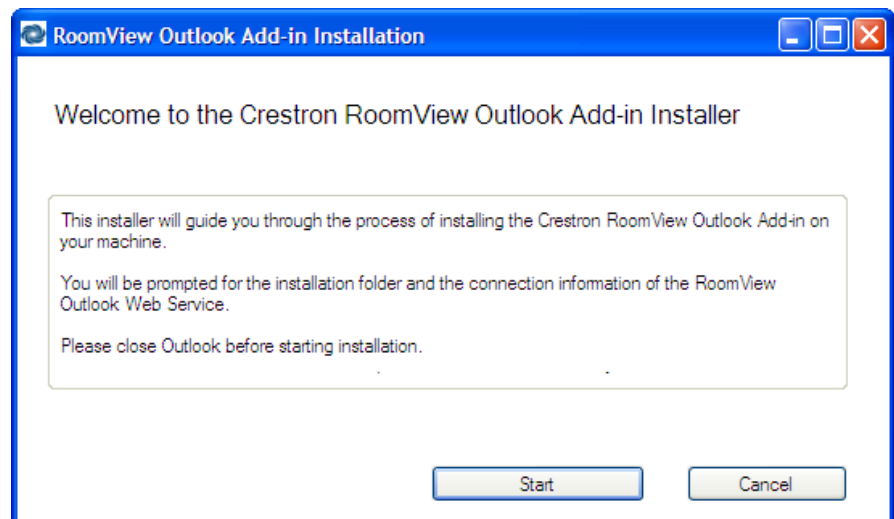
1. Once you have located the Outlook Add-in installer, double-click on it.

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**NOTE:** If Microsoft .NET Framework 3.5, Microsoft Visual Studio Tools for the Microsoft Office system version 3.0 or Windows Installer 3.1 are not already installed on your PC, the Outlook Add-In installer will prompt you to allow it to install them at this time. Click **Accept**.

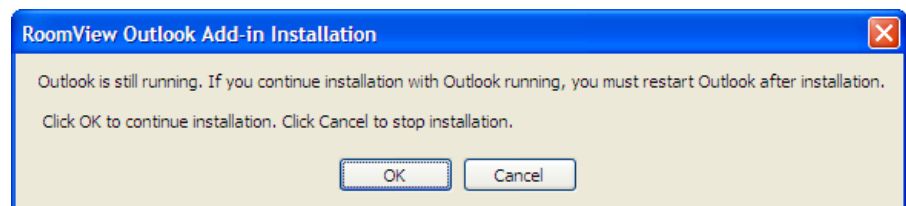
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#### ***“RoomView Outlook Add-In Installation Welcome” Window***

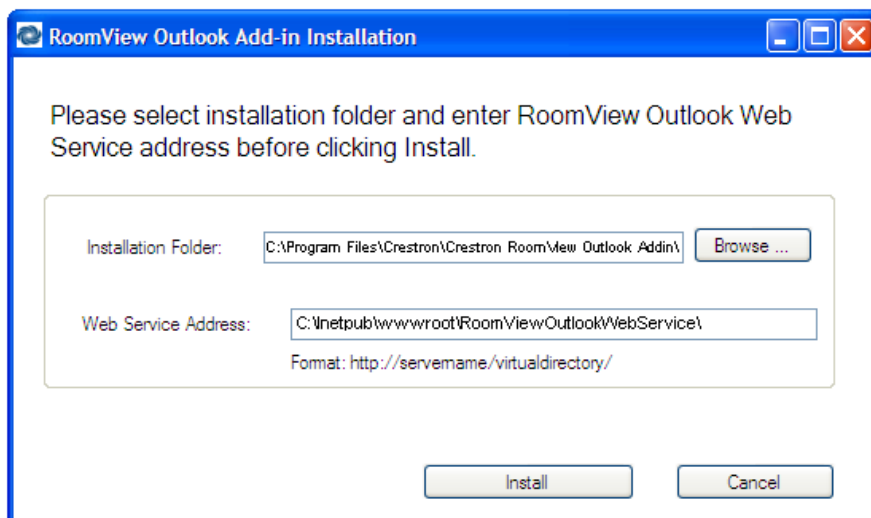


2. Click **Start**. If Outlook is running, the following warning will be displayed:

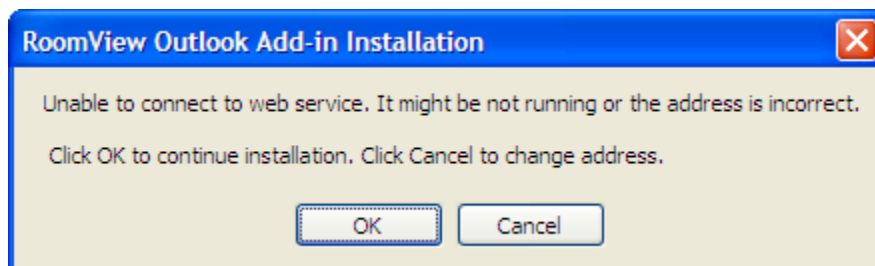
#### ***“RoomView Outlook Add-In Installation Warning” Window***



3. Click **OK** to continue with the installation or **Cancel** to stop the installation.
4. When the “RoomView Outlook Add-In Installation Folder” window opens, note the information in the *Installation Folder:* and *Web Service Address:* fields. The default addresses—shown in the figure on the next page—should reflect the default installation folder as well as the default Web Service address. These are the recommended settings, but if your situation requires something different, enter the appropriate information.

*“RoomView Outlook Add-In Installation Folder” Window*

5. Click **Install**. The installer will attempt to verify the Web Service Address before continuing the installation. If it cannot, the following warning will appear.

*“RoomView Outlook Add-In Installation Web Service Warning” Window*

6. Click **OK** to continue or **Cancel** to go back and check your entry in the *Web Service Address:* field.
7. The “RoomView Outlook Add-In Installation Success” window will appear. Click **Finish** to dismiss it.
8. Congratulations, you have completed installing the RoomView Server Edition Outlook Add-In.

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**NOTE:** The RoomView Server Edition Outlook Add-In provides two hot-key combinations in the event the installer fails to verify the correct RoomView Web Service address or fails to find the RoomView Log file.

**NOTE:** Pressing **Alt-W** will display the "RoomView Outlook Add-In Configuration" window which allows you to enter and verify the RoomView Outlook Web Service address. If necessary, enter the correct address for the web service and click **Verify**. When verification is complete a pop-up will indicate that the web address has been successfully verified. Click **OK** to dismiss the pop-up and **Close** to dismiss the "RoomView Outlook Add-In Configuration" window.

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**NOTE:** Pressing **Alt-L** will open a pop-up indicating the location of your RoomView log file directory. Click **OK** to dismiss the pop-up.

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### ***Install the RoomView Outlook Add-In Using Group Policies***

There may be circumstances where remote deployment of the RoomView Outlook Add-In is desired. Using group policies, the add-in may be automatically deployed over a network to client computers and users.

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**NOTE:** Group policy deployment will elevate user permissions in order to install the Outlook Add-In. This elevation will grant users unlimited access to system files and the registry as well as possibly create a security risk. Once installation is complete, the group policy should be removed so user permissions are returned to their previous settings.

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During the installation of the Outlook Add-In Web Service, four group policy objects are created and stored in the C:\temp\ClientInstaller\GroupPolicy\ folder:

- OutlookAddinSetup\_1\_0\_x.msi: this is the Windows Installer package for a 32 bit operating system
- OutlookAddinSetup64\_1\_0\_x.msi: this is the Windows Installer package for a 64 bit operating system
- RVOutlookWeb.bat is a batch file used to notify client computers of the address of the RoomView Web Service
- RVOutlookWeb.reg is a registry file used to notify client computers of the address of the RoomView Web Service

### ***Client Computer Requirements***

The client computer must be running Windows XP, Windows Vista or Windows 7. Before the Outlook Add-In is deployed, each client computer must also have:

- Microsoft .NET Framework 3.5
- Microsoft Visual Studio Tools for the Microsoft Office System version 3.0
- Windows Installer 3.1
- Microsoft Outlook 2007

### ***Create a Distribution Point***

You will need to create a distribution point (i.e., an accessible shared folder) on an accessible network server.

1. Log on to your Windows Server system as an administrator.
2. Create a shared network folder for each of the Outlook Add-In MSI files.
3. Set the permissions on the shared folders to allow access to the MSI files.
4. Copy each MSI file to the appropriate folder, or distribution point.

### ***Deploy the MSI Files via Group Policy***

You will need to create a Group Policy Object in the Group Policy Object Editor to distribute the Outlook Add-In.

1. Create and edit a Group Policy Object.
2. Under the User Configuration | Administrative Templates | Windows Components folder, set the Windows Installer folder to: **Always install with elevated privileges**.
3. Set the Windows Installer folder under User Configuration to: **Always install with elevated privileges**.
4. Under the User Configuration | Software Settings | Software Installation | New folder, add a Package referencing the MSI files using the full UNC path (i.e., [\\server\share\setup.msi](#)). Be sure to set the deployment method to **Assigned**.

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**NOTE:** The full path must be used to correctly indicate the location of the MSI files.

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5. Right click the Crestron RoomView Outlook Add-In package and select **Properties** from the menu. Click on the *Deployment* tab and select the **Install this application at logon** check box.
6. Under User Configuration | Windows Settings folder, click on **Scripts (Logon/Logoff)**, right-click **Logon** in the right pane and select **Properties**.
7. On the “Logon Properties” window click on the **Show Files** button. The Windows Explorer will open to the Logon folder under Group Policies.
8. Open a new Windows Explorer window and navigate to C:\temp\ClientInstaller\GroupPolicy\ on the server where the Outlook Web Service is installed. Copy the RVOutlookWeb.bat and RVOutlookWeb.reg files and paste them to the Logon folder. Close Windows Explorer.
9. Click the **Add** button and then **Browse** button on the “Add a Script” window. Select the RVOutlookWeb.bat file and then click **OK**. The file will appear in the “Logon Properties” window.
10. Click **OK** to close the “Logon Properties” window. When the end user logs on for the first time following the set up of the group policy, the Outlook Add-In will be automatically installed.

Congratulations! You have successfully installed and configured the RoomView Outlook Add-In.

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2. Products may be returned for credit, exchange or service with a CRESTRON Return Merchandise Authorization (RMA) number. Authorized returns must be shipped freight prepaid to CRESTRON, 6 Volvo Drive, Rockleigh, N.J. or its authorized subsidiaries, with RMA number clearly marked on the outside of all cartons. Shipments arriving freight collect or without an RMA number shall be subject to refusal. CRESTRON reserves the right in its sole and absolute discretion to charge a 15% restocking fee plus shipping costs on any products returned with an RMA.
3. Return freight charges following repair of items under warranty shall be paid by CRESTRON, shipping by standard ground carrier. In the event repairs are found to be non-warranty, return freight costs shall be paid by the purchaser.

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