

Crestron Fusion® Software Add-in for Outlook® Software

Enterprise Management Platform

Installation Guide Crestron Electronics, Inc.

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Crestron Fusion Software Add-In for Outlook Software: Enterprise Management Platform

Introduction

The Outlook Add-In adds the Crestron Fusion[®] software room booking wizard functionality to Microsoft[®] Outlook software when used with Crestron Fusion installed on-premises. This feature helps the user find available rooms and resources and sets actions and presets for meetings or appointments. This document is provided as an aid for installing the Outlook Web Service (OLWS) and Outlook Add-In (OLAI).

For more information on how to use the Outlook Add-In, refer to the Outlook Add-in Software User Guide (Doc. 7895).

NOTE: The OLAI is supported only on Crestron Fusion installed on-premises, and not on the Crestron[®] hosted service.

Rights

The rights to install the OLAI software depend on the company's choice of operating systems and security policies.

Version Compatibility

Crestron Fusion supports Microsoft Outlook versions 2007, 2010, 2013, and Office 365[®] software. Each new version of the OLWS and the OLAI supports all previous versions of the software. No compromise in existing functionality occurs. However, some new features might not be available if versions are mixed. To avoid any software issues, use the current version of the Crestron Fusion software. For additional information, contact the Crestron Fusion Support Group (FSG) at 1-888-273-7876 or e-mail <u>fsg@crestron.com</u>.

Configuration Settings

The configuration settings are held in a text file named OLAI.config. The configuration file contains the following settings:

ServerPath: The ServerPath is the URL to the OLWS without the file name.

Language: This is the language to be used in the OLAI User Interface (UI).

BookSingle: If the **Book Single** button is visible, then the value is true or false. BookSingle allows the user to quickly select a room for a meeting. The user can review the assets and custom fields for a particular room and bypass the room availability search. Microsoft Exchange declines the request if the room is busy.

Installation

The OLAI can be installed as a single instance on a PC or deployed to multiple PCs over a network using group policies. The OLWS needs to be installed before the OLAI on the on-premises Crestron Fusion server or in a place where the room, schedule, and asset services have access to the server.

The installation is a two-part process as follows:

1. Install the OLWS server-side software.

Only one version of the OLWS is available. The OLWS installer is not specific to the 32- or 64-bit versions of Outlook. The OLWS runtime automatically switches between 32- and 64-bit.

2. Install the Outlook Add-in client-side software.

Depending on your version of Outlook, use the 32- or 64-bit installer, and then select an installation option (UI assisted or command line).

- The UI assisted installation is a desktop installation that uses the **Previous** and **Next** buttons to move through the installation. This method is not suited for production rollouts. Note that BookSingle is not available.
- The command line installation is typically used for automated distribution installations in large facilities. It includes switches to hide the User Interface (UI), server URL, and BookSingle activation.

If you encounter any issues when installing the OLWS or OLAI software, contact FSG at 1-888-273-7876 or email <u>fsg@crestron.com</u>.

Outlook Add-In Web Service (Server-Side) Installation

To install the OLWS, complete the following steps:

1. For a client installation, right-click the **cmd.exe** shortcut, and then click **Run as Administrator**.

In the Administrator: Command Prompt window, enter msiexec /i [*MSI PATH*] into the command line prompt. [*MSI PATH*] is the path to the msi file.

Verify that the command is similar to the following: C:\Temp>msiexec /i c:\temp\OutlookWebServiceSetup_10_x_x.msi

- 2. From the **Welcome** window, click **Next** to open the **Select Installation Address** window.
- 3. Select the **Outlook Web Service for Crestron Fusion** from the **Application Pool** drop-down list.
- 4. Click **Next** and then click **Next** again to open the next window. **Please Wait** should be displayed.
- 5. After the installation is complete, close the Setup panel. An IIS reset is not required.

- 6. To verify the URI address of the OLAI, open a web browser on a client or a staging computer.
- 7. Enter the following command into the command line prompt: http://[server name]/fusion/outlookwebservice/addinservice.asmx.
- 8. Press Enter.
- 9. Verify that the page loaded displays **AddinService** in the heading.

AddinService Window

AddinService
The following operations are supported. For a formal definition, please review the Service Description
AddActionsToMeeting
GetActions
GetActionsForMeeting

After completing the OLWS installation, install the OLAI. Depending on your version of Outlook, choose the applicable installation method:

- Outlook Add-in (UI Assisted 32- and -64-bit) installation
- Outlook Add-in (Command Line 32- and 64-bit) installation

Instructions for these installation methods are described in the sections that follow.

Outlook Add-in (UI Assisted 32- and 64-Bit) Installation

To install the OLAI, complete the following steps:

- 1. Depending on your version of Outlook, use one of the following methods to verify that Outlook is 32- or 64-bit.
 - For Outlook 2007, click **Help** > **About**. The bit count is displayed.
 - For Outlook 2010 and 2013, click **File** > **Help**. The bit count is displayed under the **About Microsoft Outlook** section.
- 2. To verify the URI address of the OLWS, open a web browser on a client or a staging computer.
- 3. Enter the following command into the browser: http://[server name]/fusion/outlookwebservice/addinservice.asmx.
- 4. Press Enter.
- 5. Verify that the page loaded displays **AddinService** in the heading.

AddinService Window



6. If your version of Outlook is 32-bit, right-click RVOutlookAddinSetup_x_x_32bit.exe.

If your version of Outlook is 64-bit, right-click RVOutlookAddinSetup_x_x_64bit.exe.

7. Click Run as Administrator to open the Welcome to the Crestron Fusion Add-In for Outlook Setup Wizard window.

Welcome to the Crestron Fusion Add-in for Outlook Setup Wizard Window



8. Click Next to open the Ready to Install window.

Ready to Install Window



9. Click Install to open the Installing window.

Installing Window

Setup - Crestron Fusion Add-in for Outlook	<u>_ ×</u>
Installing Please wait while Setup installs Crestron Fusion Add-in for Outlook on your computer.	
Finishing installation	
	Cancel

After the setup process is complete, the Welcome to the Crestron Fusion Add-in for Outlook Setup Wizard window opens.

Welcome to the Crestron Fusion Add-in for Outlook Setup Wizard Window

Crestron Fusion Add-in for Outloo	ok		
Welcome to the Crestron Outlook Setup Wizard	n Fusion Ac	ld-in for	
The installer will guide you through the st your computer.	eps required to inst	all Crestron Fusion Ad	d-in for Outlook on
WARNING: This computer program is pro	otected by copyrigh	t law and internationa	I treaties.
Unauthorized duplication or distribution o or criminal penalties, and will be prosecut	r this program, or ar ed to the maximum	iy portion of it, may re extent possible under	suit in severe civii the law.
	Cancel	< Back	Next >

10. Click Next to open the License Agreement window.

License Agreement Window

🙀 Crestron Fusion Add-in fo	r Outlook							
License Agreemen	t							
Please take a moment to read th Agree", then "Next". Otherwise	Please take a moment to read the license agreement now. If you accept the terms below, click "I Agree", then "Next". Otherwise click "Cancel".							
CRESTRON	CRESTRON SOFTWARE END-USER LICENSE AGREEMENT Rev. 2.0, 01 August 2014							
Thank you for using "Software"). By dow Software or any por which the Software i this End Usor Licon	Thank you for using this Crestron end-user software product (the "Software"). By downloading, installing, or otherwise using the Software or any portion thereof, or using a Crestron Device on which the Software is pre-installed, You agree to be bound by this End Lisor Lisonson Arroamont (the "ACREEMENT"), which							
C I Do Not Agree	C I Do Not Agree © I Agree							
	Cancel	< Back Next >						

- 11. Review the license agreement and then click I Agree.
- 12. Click Next to open the Outlook Web Service window.

Outlook Web Service Window

🙀 Crestron Fusion Add-in for Outlo	ok		_ 🗆 🗵
Outlook Web Service			
Please provide the URL (without file nan	ne)		
Web Service Folder:			
http://servername			
	Cancel	< Back	Next >

13. Enter the ServerPath (URL provided by Crestron) in the **Web Service Folder** field. Click **Next** to open the **Select Installation Folder** window.

Select Installation Folder Window

🖶 Crestron Fusion Add-in for Outlook	
Select Installation Folder	
The installer will install Crestron Fusion Add-in for Outlook to the following folder. To install in this folder, click "Next". To install to a different folder, enter it below	or click "Browse".
C:\Program Files (x86)\Crestron\Crestron Fusion Add-in for Dutlook	Browse Disk Cost
Cancel < Back	Next >

- 14. To install the OLAI into a folder other than the default folder, enter the desired location into the **Folder** field or click **Browse** to choose a location.
- 15. Click **Disk Cost** to open the **Crestron Fusion Add-in for Outlook Disk Space** window.

Volume	Disk Size	Available	Rec 4
■C:	297GB	189GB	64!
⊋м:	458GB	11GB	
⊋ P:	341GB	74GB	
🚽 Q:	341GB	74GB	
⊋ R:	579GB	28GB	
⊋ S:	488GB	280GB	
	2023GB	199GB	

Crestron Fusion Add-In for Outlook Disk Space Window

- 16. Choose a drive to install the OLAI, view the disk space information, and then click **OK**.
- 17. Click **Next** from the **Select Installation Folder** window to open the **Confirm Installation** window.

Confirm Installation Window

🙀 Crestron Fusion Add-in for Outlook	
Confirm Installation	
The installer is ready to install Crestron Fusion Add-in for Outlook or	n your computer.
Click "Next" to start the installation.	
Cancel	< Back Next >

18. Click **Next** to confirm the installation and open the **Installing Crestron Fusion Add-in for Outlook** window.

Installing Crestron Fusion Add-in for Outlook Window

🙀 Crestron Fusion Add-in for Outlook		
Installing Crestron Fusion Add-in for Outlook	2	
Crestron Fusion Add-in for Outlook is being installed.		
Please wait		
Cancel	< Back	Next >

After the OLAI is installed, the Installation Complete window opens.

Installation Complete Window

🙀 Crestron Fusion Add-in for Outlook	
Installation Complete	
Crestron Fusion Add-in for Outlook has been successfully installed.	
Click "Close" to exit.	
Please use Windows Update to check for any critical updates to the .N	ET Framework.
Cancel < B;	ack Close

19. Click Close to open the Completing the Crestron Fusion Add-in for Outlook Setup Wizard window.

Completing the Crestron Fusion Add-in for Outlook Setup Wizard Window



- 20. Click Finish.
- 21. To validate the installation, wait at least 5 minutes and then close and reopen Outlook.

22. Click Calendar and then click New Meeting to open a meeting.

Calendar and New Meeting

A Mail	File	Home	Send / F	Receive	Folder	Vie	w J	Adobe P	DF	
Calendar			.	5	B	2222222	2222222	2222222	1111111	
	New Appointmen	New Meeting	New Items *	Today	Next 7 Days	Day	Work Week	Week	Month	Schedul View
		New		Golt	in R			Arrange		

23. Click the Crestron RoomView® application button to load the Add-In services.

Crestron RoomView

File Meeting Insert Format Text Review										
Image: Calendar Delete Copy to My OneNote Actions Forward * Calendar OneNote Actions Image: Calendar Scheduling Crestron Boowlew Image: Calendar C	File	Meeting	Insert	Format Text	Review					
Actions Show Attendees Invitations have not been sent for this meeting. Image: Constraint of the sent for the sent f	Delete (Copy to My Calendar	Calendar Forward ▼ OneNote	Appointment	Scheduling Assistant	Crestron RoomView	Cancel Invitation	Address Book	Check Names	Response Options *
Invitations have not been sent for this meeting. To Subject: Location: Start time: Mon 4/6/2015 Total age event Total age event		Actions		Show			Attendees			
Subject:	 Invita 	ations have not	been sent fo	or this meeting.						
Send Location: Start time: Mon 4/6/2015 • 7:00 AM • I All day event End time: Mon 4/6/2015 • 7:30 AM •	_	Subject:								
Location: Start time: Mon 4/6/2015 • 7:00 AM • All day event End time: Mon 4/6/2015 • 7:30 AM •	Send									
Start time: Mon 4/6/2015 ▼ 7:00 AM ▼ □ All day event End time: Mon 4/6/2015 ▼ 7:30 AM ▼		Location:								
Start time: Mon 4/6/2015 • 7:00 AM • I All day event End time: Mon 4/6/2015 • 7:30 AM •	L		L							
End time: Mon 4/6/2015 V 7:50 AM		Start time: Mon 4/6/2			7:00	AM	- 🗆 All o	day event		
		End time:	MOT 4/6/20	015	1:50	AM	<u> </u>			

When the Add-In services are loaded, a region list is displayed in the **Room Selection** window.

NOTE: The Add-In services may take some time to load.

Room Selection Window Displaying a Region List

Room Selection Meeting Properties	
Start Time: 2/11/2015 • 7:00:00 AM 🚖 End Time: 2/11/2015 • 7:30:00 AM 🚖	
Selection	Summary Search Result
M Regions Wol dige 19 Roie Street Scale CA Souge Counting For Anno Counting For Anno New Anno N	
Clear Selection Add Regions with Criteria	Clear Selected Criteria Clear All Criteria Find Available Room

Outlook Add-in (Command Line 32- and 64-Bit) Installation

To install the OLAI, complete the following steps:

- 1. Depending on your version of Outlook, use one of the following methods to verify that Outlook is either 32- or 64-bit.
 - For Outlook 2007, click Help > About. The bit count is displayed.
 - For Outlook 2010 and 2013, click **File** > **Help**. The bit count is displayed in the **About Microsoft Outlook** section.
- 2. To verify the URI address of the OLWS, open a web browser on a client or staging computer.
- 3. Enter the following address into the browser: http://[server name]/fusion/outlookwebservice/addinservice.asmx.
- 4. Press Enter.
- 5. Verify that the page loaded displays **AddinService** in the heading.

AddinService Window

AddinService
The following operations are supported. For a formal definition, please review the Service Description
<u>AddActionsToMeeting</u>
<u>GetActions</u>
<u>GetActionsForMeeting</u>

- 6. Depending on the installation type, use one of the following methods to run the command line prompt as an administrator.
 - For a client installation, right-click the **cmd.exe** shortcut and then click **Run as Administrator**.
 - For an automated distribution, locate the prompt and enter the command in the distribution software. Verify that the account is run as an administrator.
- 7. Enter [*EXE path*] /[*URI Address*] /verysilent into the command line prompt to install the OLAI.
 - [EXE path] for 32-bit is RVOutlookAddinSetup_x_x_32bit.exe
 - [EXE path] for 64-bit is RVOutlookAddinSetup_x_x_64bit.exe
 - [URI Address] is url=http://[ServerName]/fusion/outlookwebservice

Refer to the table below for information on switches.

Switch Type	Description
/bsn	This switch activates the BookSingle features and is either true or false. To enable the BookSingle functionality, add /bsn=true. For example, to add the /bsn switch type to the [EXE path] command above, enter RVOutlookAddinSetup.exe /bsn=true.
/silent	This switch runs setup automatically with the UI displayed. Input is inhibited.
/url	This switch sets the path to the Outlook web service.
/verysilent	This switch inhibits the UI and runs setup automatically.

- 8. Depending on the installation type, use one of the following methods to run the installation command.
 - For a client installation, press Enter at the command prompt.
 - For an automated installation, consult the manufacturer's instructions on how to run the command.
- 9. To validate the installation, wait at least 5 minutes and then close and reopen Outlook.
- 10. Click Calendar and then click New Meeting to open a meeting.

Calendar and New Meeting



11. Click Crestron RoomView to load the Add-In services.

Crestron RoomView

File	Meeting	Insert	Format Text	Review						
Delete	Copy to My Calendar	Calendar Forward ▼ OneNote	Appointment	Scheduling Assistant	Crestron RoomView	Cancel Invitation	Address Book	Check Names	Response Options *	
	Actions			Show			Atten	dees		
Invit	Invitations have not been sent for this meeting.									
	To									
Send	Subject:									
Send	Location:									
Start time: Mon 4/6/2015 - 7:0				· 7:00	0 AM 🚽 🗌 All day event					
	End time:	Mon 4/6/20	015	• 7:30	AM	•				

When the Add-In services are loaded, a region list is displayed in the **Room Selection** window.

NOTE: The Add-In services may take some time to load.

Room Selection Window Displaying a Region List



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