

Author: Sanjay Sansanwal

Title: Configuring FileCM Extensions for Outlook

The information in this article applies to:

- FileCM 2.6, 3.0, 3.5, 3.5.1, 3.5.2, 4.0, 4.2
 - Microsoft Windows 2000 Professional, Windows XP
 - Microsoft Windows 2000 Server and 2003 Server
 - Office 2000, Office XP, Office 2003 , Office 2007
-

SUMMARY

Moderate: Requires Visual Basic For Applications (VBA) skills, and interoperability skills.

This article explains how to configure FileCM Extensions for Outlook.

This article assumes that you are familiar with administering and configuring applications. For more information about Microsoft Outlook, or FileCM, please refer to your product documentation.

This article assumes you are familiar with administering FileCM.

MORE INFORMATION

FileCM Extensions for Outlook allows users of FileCM to register emails directly from Microsoft Outlook to FileCM. The solution uses the built in VBA project for Microsoft Outlook named VBAProject.OTM. This file will need to be modified to suit your FileCM environment and then deployed to each user that wants to run the FileCM Extension.

PREREQUISITES

To complete this procedure, you must have configured your systems as per the application note Installing and Configuring FileCM Remote PC Client (S/PRD/FCM/DDS/0053.04).

ASSUMPTIONS

It is assumed that you have configured FileCM with an ID Key structure, fields and forms and have an operating FileCM Environment.

It is an assumption that you have an operating environment that uses Microsoft Outlook.

Install Required Files

1. Copy the VBAProject.OTM file from the Extensions folder on the FileCM Installation CD to the FCMInst\Templates folder.
2. Change the properties of the VBAProject.OTM file so that it is NOT read only.

Configure VBAProject.OTM

1. On a computer with Microsoft Outlook installed, copy the VBAProject.OTM to your Outlook Application Data folder in your local profile
(by default C:\Documents and Settings\<USERNAME>\Application Data\Microsoft\Outlook\)

Note: Microsoft Outlook only supports one VBA project and it MUST be named VBAProject.OTM to work. If you have an existing VBAProject.OTM file, you will need to merge the following procedure with your existing solution.

2. Open Microsoft Outlook
3. Open the Visual Basic Editor.
4. Locate and open the Module named FileCMCode.
5. In the declarations area, change the following details:
 - Public Const FileCMServer = " " SET TO: IP address or your FileCM Server
 - Public Const FileCMUpdateLocation = " " SET TO: "\\MyServer\FCMInst\Updates\"
(Where MyServer is the server hosting the FCMInst share)
 - Public Const FileCMTemp = " " SET TO: "\\MyServer\FCMInst\Temp\"
(Where MyServer is the server hosting the FCMInst share)
 - Public Const FileCMLocation = " " SET TO: "C:\Program Files\FileCM Remote\"
 - Public Const FileCMEField = " " SET TO: The name of your OS store or DB store that the attached file will be attached to.
6. SBS recommends that VBA projects be digitally signed to work efficiently with Microsoft Outlook security. Please complete the steps in "Digitally Signing VBA Projects" below before continuing.
7. Save and close the VBA Project.
8. Close Microsoft Outlook.
9. Copy the VBAProject.OTM file from the folder specified in Step 1 to the FCMInst\Templates folder.

Digitally Signing VBA Projects

All VBA projects should be digitally signed to enable them to work efficiently with Microsoft security. Please read Microsoft's documentation for recommendations on when to use SelfCert to sign VBA projects. Follow the steps below to digitally sign your project.

1. On the Windows Start menu, point to Programs, and then click Windows Explorer.
2. In Windows Explorer, navigate to the Program Files\Microsoft Office\Office folder, where Program Files is the drive and folder where you installed Microsoft Office.
3. Find the SelfCert.exe program, and double-click it.

NOTE: The SelfCert.exe program is not part of the standard installation of Microsoft Office. If you need to install the SelfCert.exe program, rerun Setup for Office CD1 and click Add or Remove Features. Click the plus sign (+) next to Office Tools; click Digital Signature for VBA Projects and then click Run from My Computer. Click Update Now.

4. After SelfCert starts, type your name in the Your name box, and click OK.
5. In the VBA project, on the Tools menu, click Digital Signature. This displays the Digital Signature dialog box.
6. Click Choose to select a digital certificate. This displays the Select Certificate dialog.
7. Select the Certificate you just created in step 4 above.
8. Click OK twice.

Deploy to Users

The VBAProject.OTM needs to be deployed to your users. It needs to be copied to each user's profile section into the folder as specified in Step 1 of the Configure VBAProject.OTM section above. This can be done via logon scripts, batch files or any other deployment methods you currently have in place.

Due to a limitation in the way that Microsoft Outlook checks for the existence of a VBAProject.OTM file exists, the following steps need to be performed on each computer that this file has been deployed to.

9. Open Microsoft Outlook.
10. If you have opted to digitally sign your project a security warning dialog box may appear
 - a. If the "Always trust macros from this source" is unavailable you will have to install the certificate. To do this
 1. Click Details
 2. Click View certificate
 3. Click Install Certificate
 4. Follow wizard instructions.
 5. After restarting Outlook the "Always trust macros from this source" will be enabled.
 - b. Click View details of the certificate and verify it is correct.
 - c. Click Ok
 - d. Tick always trust macros from this source
 - e. Enable macros
11. If you have opted to digitally sign your project and a security warning dialog box did not appear
 - a. Select Tools|Macro| Security.
 - b. Ensure that Macro Security is set to High
 - c. Select Tools|Macro|Macros
This will activate Microsoft Outlook to check for a VBAProject.OTM file
 - d. If the security dialog box appears continue at step 10, otherwise restart Outlook.
12. If you have opted not to digitally sign your project
 - a. Select Tools|Macro|Security
 - b. Ensure that Macro Security is set to Medium
 - c. Select Tools|Macro|Macros
This will activate Microsoft Outlook to check for a VBAProject.OTM file.
13. Close and reopen Microsoft Outlook.

Notes

Users may receive a popup when registering documents asking how long the software is allowed to access the users email. Refer to Microsoft Knowledgebase article 290499 for details on how to prevent this, or search MSDN for "Outlook Administrative Package".