

# User Guide



# **GROOVEIT!**

for Microsoft® Office Outlook®

GrooveIT! products are edited by  
 **HOMMES & PROCESS**  
www.hommesetprocess.com

[www.grooveit.biz](http://www.grooveit.biz)

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# 1. Presentation

## 1.1. Value proposition

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GrooveIT! was designed to optimise integration of Microsoft Office Groove and Microsoft Office Outlook, and hence get the most out of your Microsoft Office Groove / Microsoft Office Outlook deployment.

GrooveIT! For Microsoft Office Outlook has been developed to ease and automate information transfer from Microsoft Office Outlook to Microsoft Office Groove.

- Transfer Outlook relevant information to Microsoft Office Groove
- Save time in information management
- Share instantaneously business information with your team
- Accelerate information treatment
- Decrease time spent to manage information, increase productive time

A Groove and Outlook user who saves 5 minutes time per working day with GrooveIT! will save an entire working week per year... Achieve more with the same resources!

Download: [www.grooveit.biz/en/foroutlook/home.aspx](http://www.grooveit.biz/en/foroutlook/home.aspx)

## 1.2. GrooveIT! essentials

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A full set of features dedicated to individual and team efficiency:

- Transfer information from Microsoft Office Outlook to Microsoft Office Groove:
  - o E-mails, RSS feeds, contacts, tasks, appointments, and their attachments
  - o Manually or by using GrooveIT! rules
  - o Update calendar events, contacts and tasks when modified in Outlook
- Benefits from advanced Groove tools : support of Groove links, attachments management, filtering,
- Build discussion threads of your emails, and avoid duplicates
- Create new Groove workspaces and invite your contacts, easily from within Outlook
- Send your Groove VCard to your Outlook contacts with one single click

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## 2. Installation

### 2.1. System requirements

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- ▶ Supported operating systems:
  - Microsoft Windows 2003
  - Microsoft Windows XP
  - Microsoft Vista
  
- ▶ Software requirements:
  - Microsoft Office Outlook 2003 ou Microsoft Office Outlook 2007
  - Groove Virtual Office V3.x ou Microsoft Office Groove 2007
  - .NET Framework v2.0: Install the Microsoft .NET Framework v2.0 redistributable package prior to installing the VSTO 2005 SE redistributable package

The Microsoft .NET Framework v2.0 redistributable package can be downloaded at the following address:

[www.microsoft.com/downloads/details.aspx?displaylang=en&FamilyID=0856EACB-4362-4B0D-8EDD-AAB15C5E04F5](http://www.microsoft.com/downloads/details.aspx?displaylang=en&FamilyID=0856EACB-4362-4B0D-8EDD-AAB15C5E04F5)

**GrooveIT! For Microsoft Office Outlook is compatible with Exchange 2003 and Exchange 2007.**

### 2.2. Installation

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- ▶ Step 1: Download installation files «grooveitforoutlook2.exe» to [www.grooveit.biz/en/foroutlook/home.aspx](http://www.grooveit.biz/en/foroutlook/home.aspx).
  
- ▶ Step 2: Launch the GrooveIT! for Microsoft Office Outlook installation program  

Double-click the «grooveitforoutlook2.exe» file. If *VSTO 2005 SE runtime* has not been previously installed, you will be prompted to install it following Microsoft's instructions.

## 2.3. Activate GrooveIT!

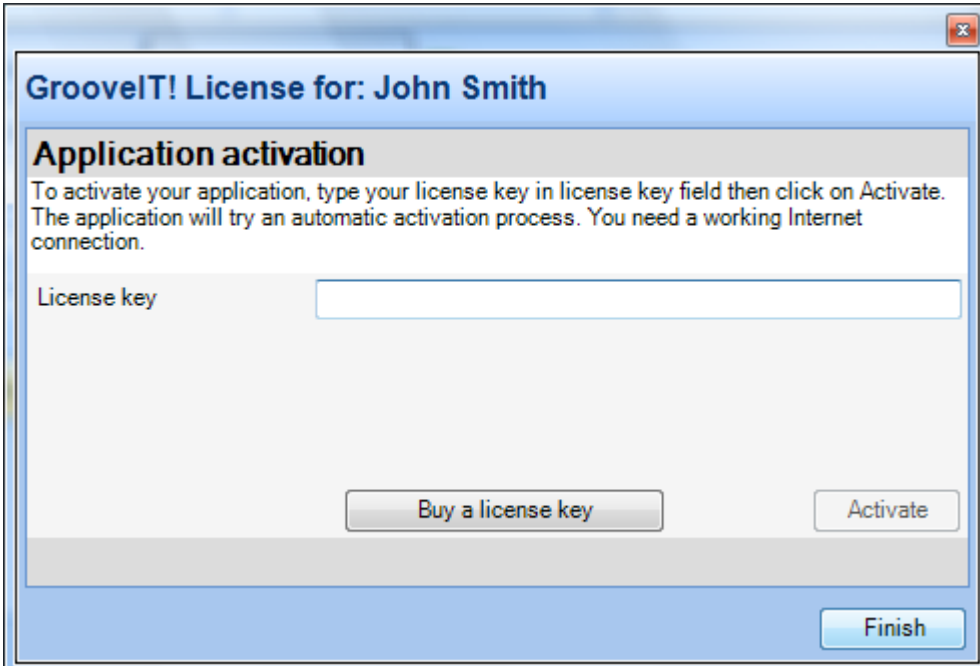
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### INDIVIDUAL ACTIVATION

To acquire a 30 days free trial license, complete the form on our Web site: [www.grooveit.biz/en/foroutlook/home.aspx](http://www.grooveit.biz/en/foroutlook/home.aspx).

When you buy a perpetual license, you have to replace your trial license by your perpetual license key. To activate your perpetual license, please follow these few steps:

- You will receive your license key by e-mail
- Copy the license key number contained in your e-mail
- In GrooveIT! Menu go to "License"
- Paste you license key number as indicated in the figure below



**GrooveIT! License for: John Smith**

**Application activation**

To activate your application, type your license key in license key field then click on Activate. The application will try an automatic activation process. You need a working Internet connection.

License key

FIGURE 1: ACTIVATE GROOVEIT! LICENSE

If your license key is valid you will see a "Valid" status for your identity.

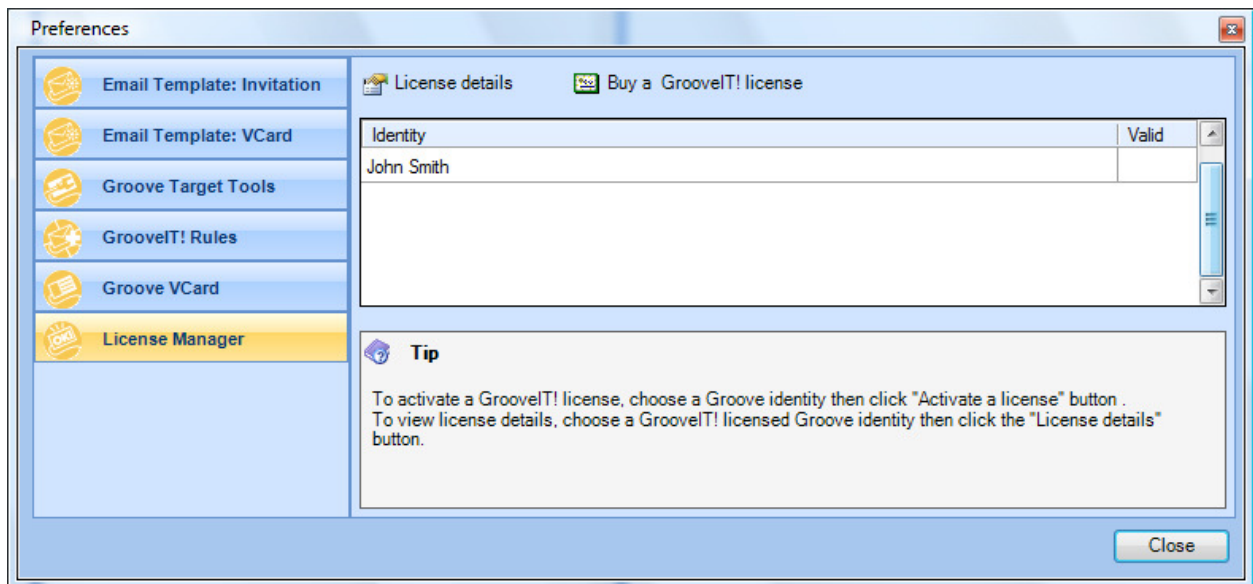


FIGURE 2: GROOVEIT! MANAGER LICENSES

## ENTERPRISE ACTIVATION

Please note that Hommes & Process propose Enterprise volume licensing including:

- corporate license (1 single license number for all users)
- automatic activation of GrooveIT! for "managed" Groove users (= Groove domain ; requires deployment of Microsoft Office Groove servers or Microsoft Office Groove Enterprise Services)
- ...

Your advantages:

- Volume pricing
- Optimized deployment
- Cut costs for license management and administration.

If you are interested in these options, then please let us know.

Call : + 33 1 70 08 51 25

Or leave us a message at: [www.grooveit.biz/en/foroutlook/contactus.aspx](http://www.grooveit.biz/en/foroutlook/contactus.aspx)

## 3. User's Guide

### 3.1. Glossary

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- ▶ Outlook item:  
Any item in Outlook such as an E-mail, RSS feeds, contacts, tasks, appointments, and their attachments
- ▶ Target tool:  
Any tool in a Groove workspace that can receive the contents of an Outlook item.

### 3.2. GrooveIT! for Microsoft Office Outlook features

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#### MANUALLY SENDING AN OUTLOOK ITEM TO MICROSOFT OFFICE GROOVE

##### i. Overview

**Objective:** Post one or more Outlook items in Microsoft Office Groove.

While posting items with this feature, you can simultaneously create a new Groove workspace where your Outlook items will be posted and invite recipients to join it.

A Groove alert will appear once the items have been posted in Microsoft Office Groove.

##### ii. Use

- ▶ Requirements
  - One or more Outlook items must be selected
  - Microsoft Office Groove must be running (an Internet connection is not required to use GrooveIT!)
- ▶ Procedure

After selecting one or more items, there are three ways to access this feature as shown in Figures 3 and 4 below:

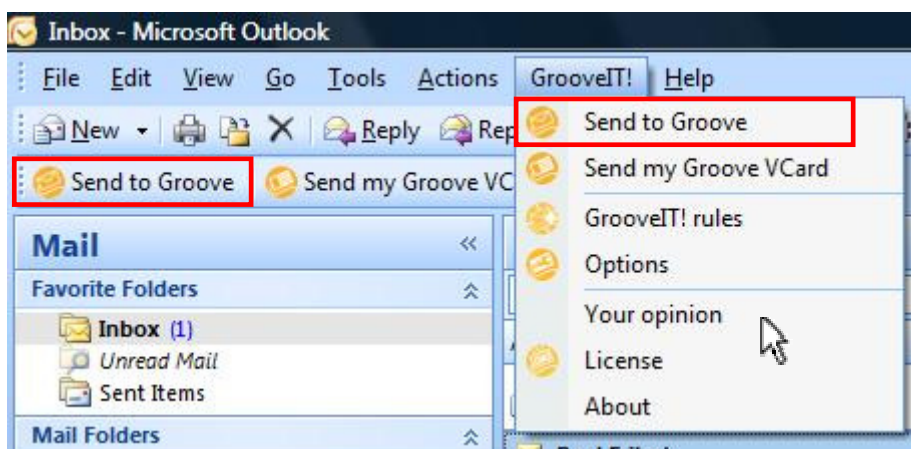


FIGURE 3: MANUALLY SENDING AN OUTLOOK ITEM TO MICROSOFT OFFICE GROOVE

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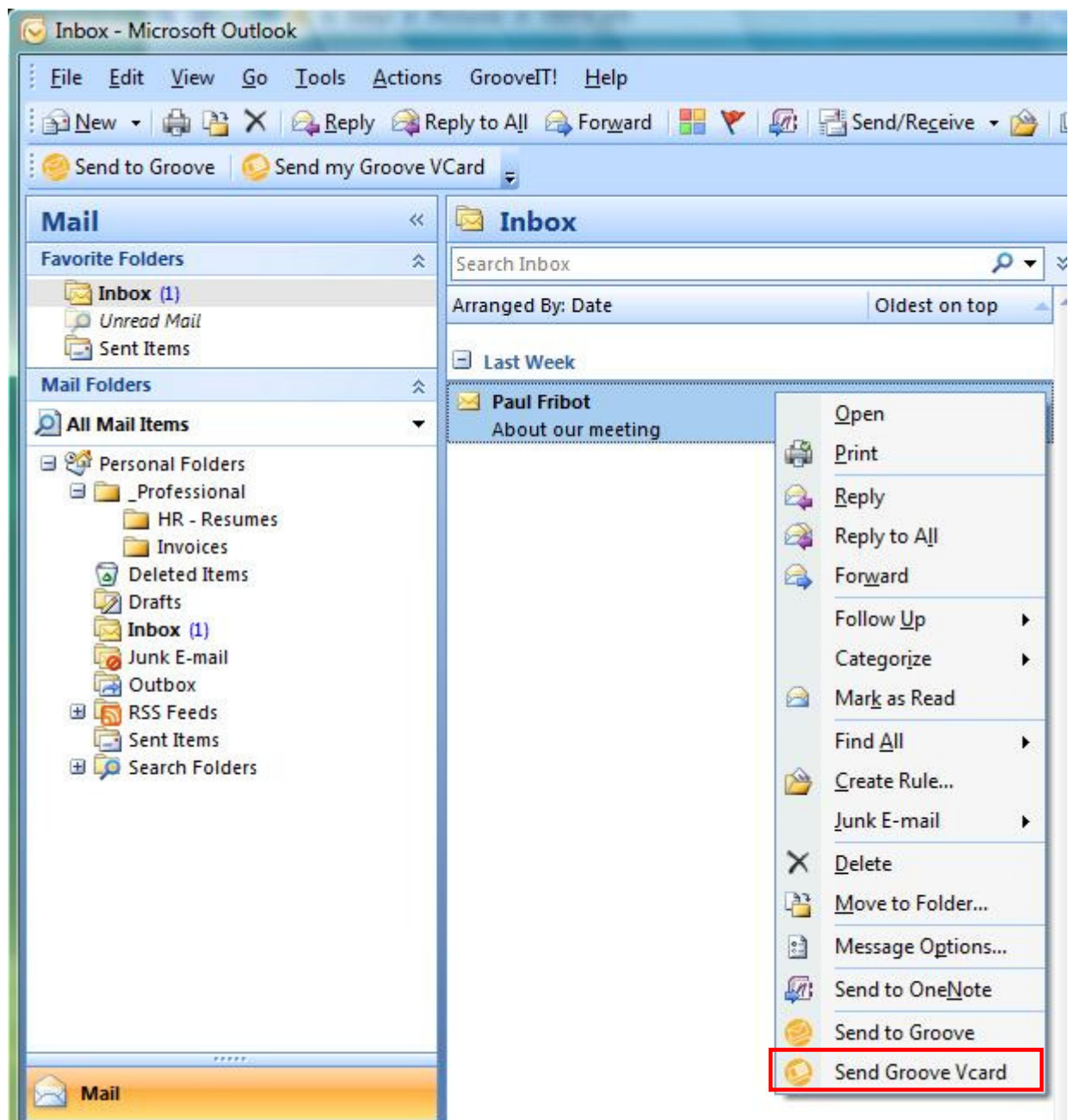


FIGURE 4: E-MAIL MESSAGE CONTEXT MENU

- ▶ Step 1: Identity and target workspace
  - Select a Groove identity
    - ➔ If you have only one identity on your computer, it is selected by default.
  - Select a workspace
    - ➔ A workspace filter is available to help you find the name of the target workspace for posting. After finding your desired workspace, select it and go to Step 4.
    - ➔ If you want to create a new workspace, use the "New..." button located on the right side of the window. This will enable you to create a new target workspace for posting.

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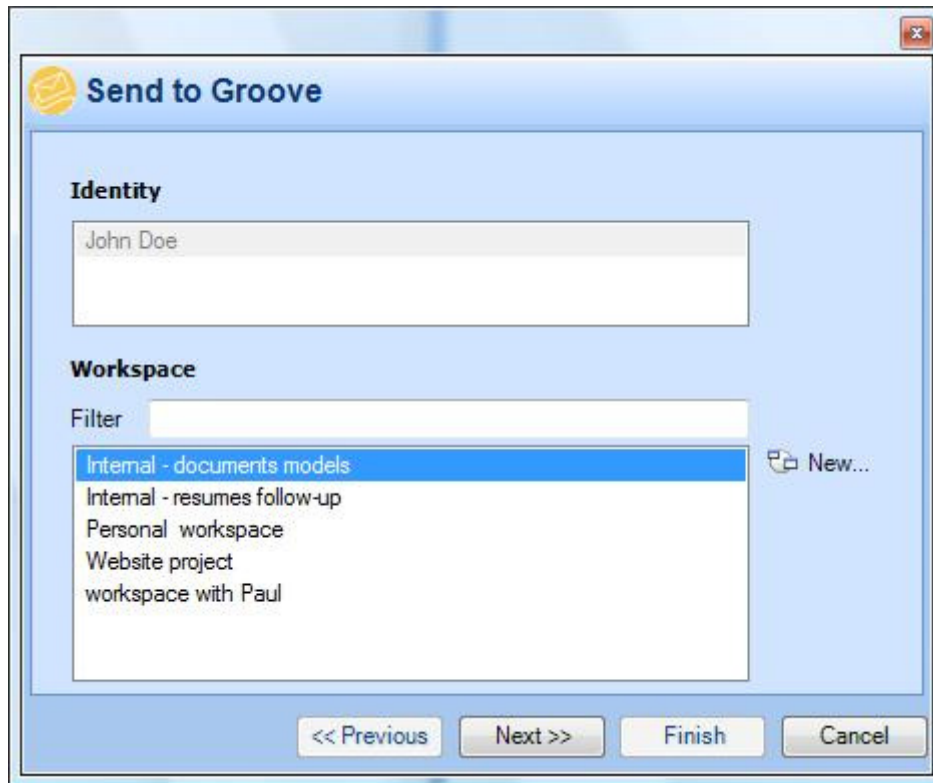


FIGURE 5: IDENTITY AND TARGET WORKSPACE

► Step 2: Creating a new workspace

- Select a name for the new workspace.
  - Select contacts (sender and recipients of the e-mail message) to invite to the new workspace.
- Use the “Add” button to add contacts to invite to the new workspace. Contacts come from your Outlook contact list.

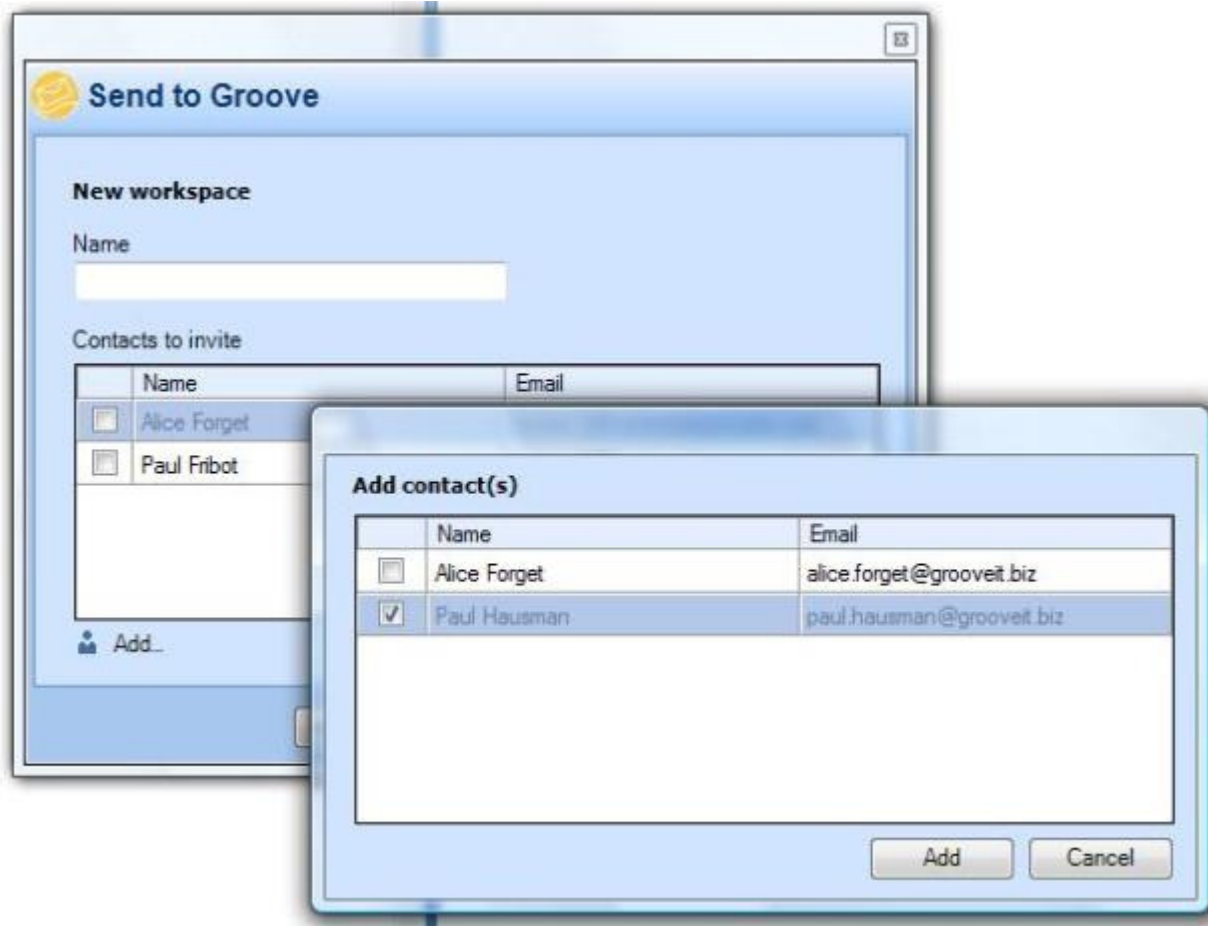


FIGURE 6: CREATING A NEW WORKSPACE

► Step 3: Invitation e-mail

- Select a subject and message for the e-mail to the selected contacts
- ➔ Using a message template you can customize this information. For more information, refer to the "Configuring message templates" chapter.

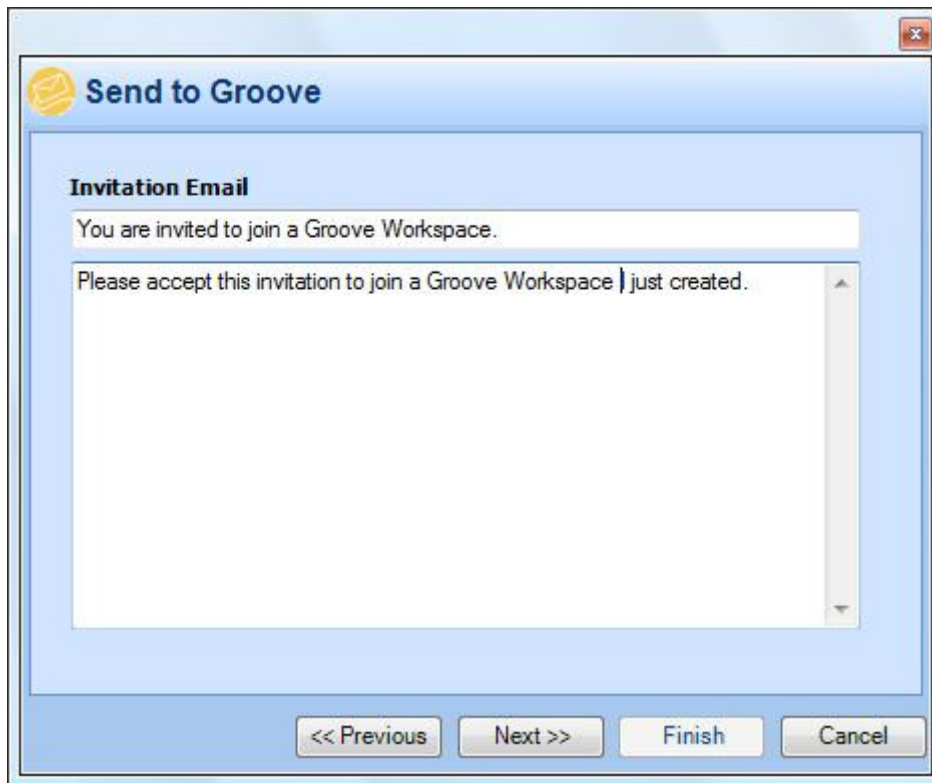


FIGURE 7: INVITATION E-MAIL

- ▶ Step 4: Selecting target tools
  - Select a target tool where selected Outlook item(s) will be posted.
- ➔ You can also use the New tool... button to add a "New tool" that is more appropriate.

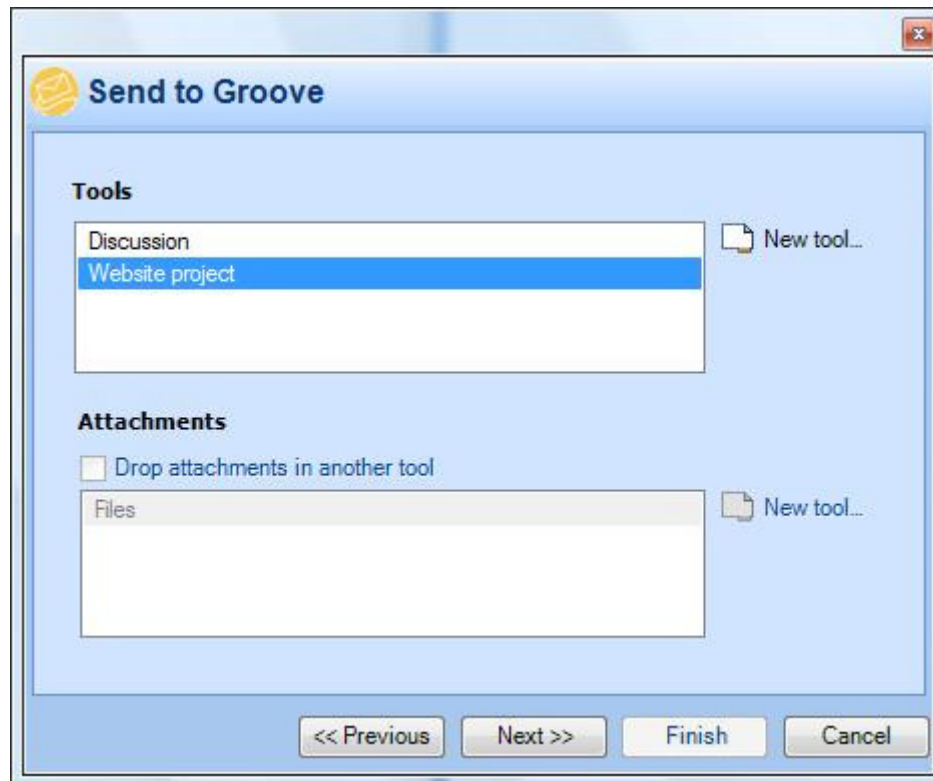


FIGURE 8: SELECTING TARGET TOOLS

► Step 5: Selecting attachments

- Select the attachment(s) to be posted
- ➔ This step will appear only if e-mail messages were selected for posting.

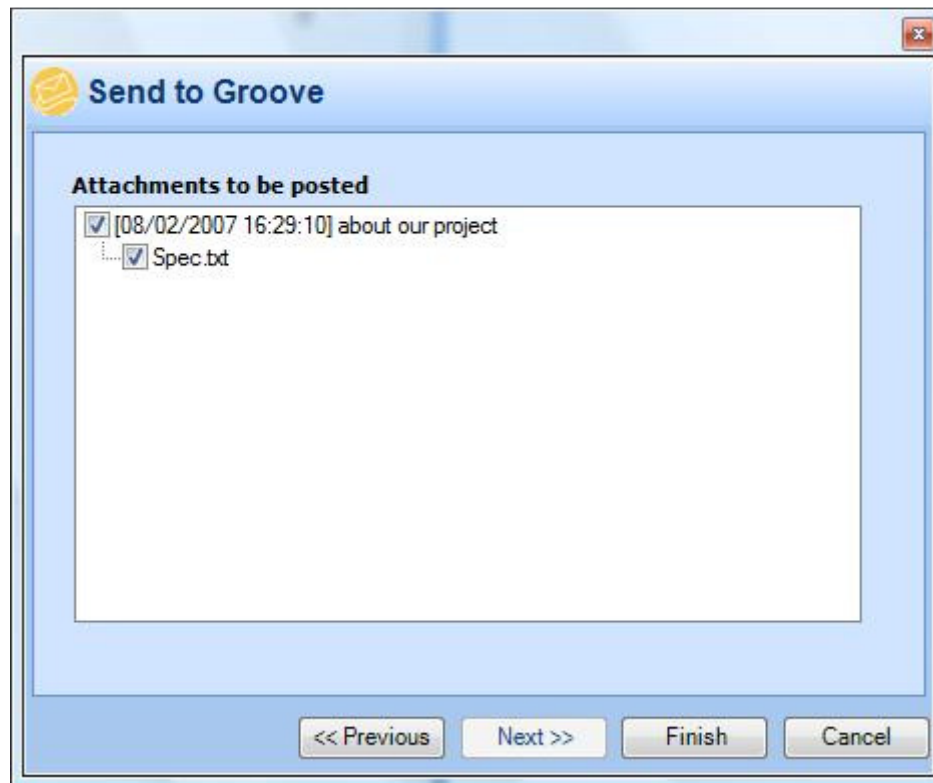


FIGURE 9: SELECTING ATTACHMENTS

## AUTOMATIC PROCESSING RULES

### i. Overview

Outlook has rules feature where definitions can be created to sort E-mails, RSS feeds, contacts, tasks, appointments automatically on receipt or on request based upon criteria including keywords, author, and date. These rules primarily enable E-mails, RSS feeds, contacts, tasks and appointments to be moved to specified Outlook folders.

In the same vein, GrooveIT! Rules can link an Outlook folder to a Groove target (workspace + tool). A message delivered to a specified folder would thus be automatically detected and posted in Microsoft Office Groove.

By pairing both features (Outlook Rules + GrooveIT! Rules), you can use criteria to completely automate message posting in Microsoft Office Groove.

This function is very useful for messages that refer to specific events or that require processing by a team.

*Note:* An Outlook rule is not required to set up a Groove rule. Sometimes it is actually easier to move Outlook item manually into Outlook folders with an existing GrooveIT! Rule than to create a new GrooveIT! Rule.

### ii. Defining an automatic processing rule

#### ► Procedure

There is two way to create GrooveIT! rules: one is from context menu(Outlook 2007 only), the second is by using GrooveIT! menu, as shown in Figures 10 and 11 below:

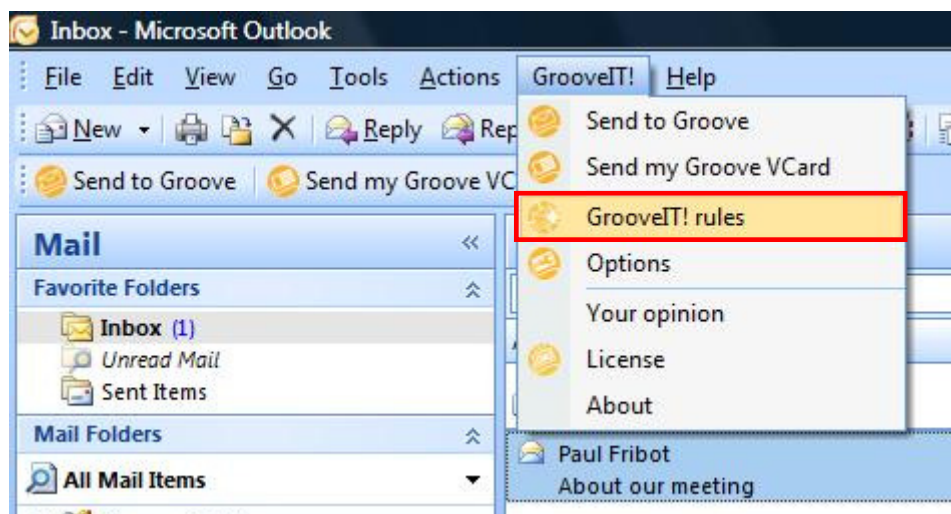


FIGURE 10: CREATING A GROOVEIT! RULE

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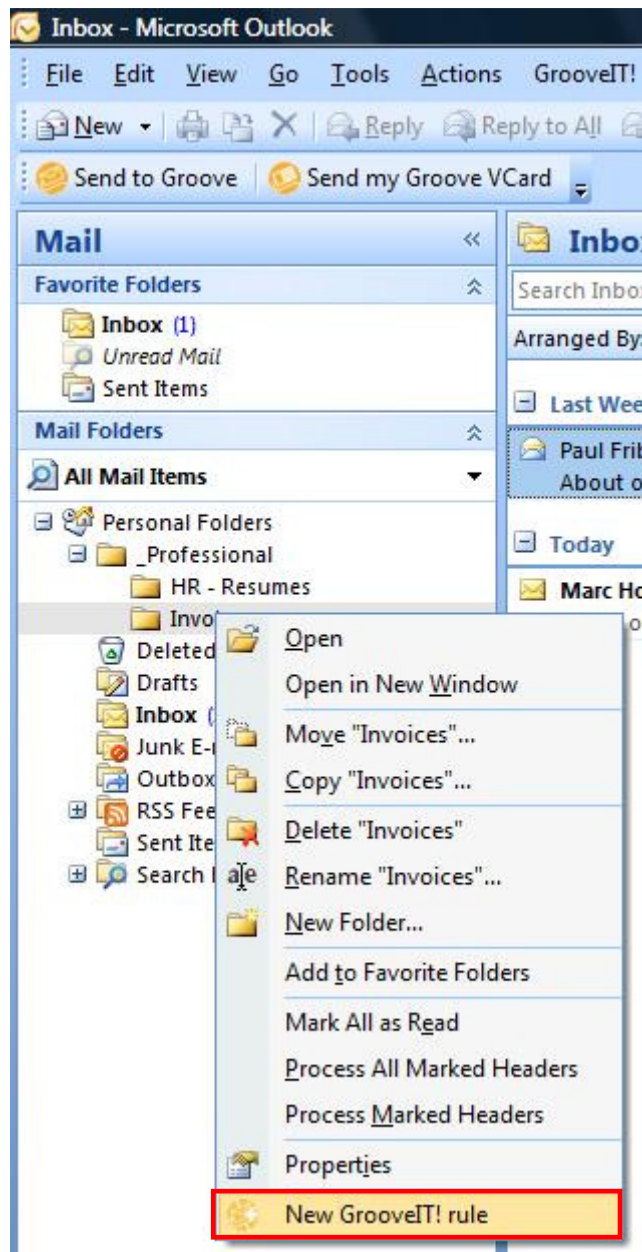


FIGURE 11: CREATING A GROOVEIT! RULE VIA CONTEXT MENU

- ▶ Step 1: Rule name and description
  - Select a name a workspace and description (optional):



FIGURE 12: RULE NAME AND DESCRIPTION

- ▶ Step 2: Selecting the source folder
  - Select the Outlook source folder
  - ➔ You can also use the “New...” button to create a new folder. The new folder will be a subfolder of the folder selected in the folder tree.
  - ➔ Red Xs on folders indicate that GrooveIT! is not authorized to define a rule for these folders; these folders may not be allowed to receive Outlook items or these folders may be Outlook system folders..
  - ➔ Green checkmarks indicate that these folders already have a GrooveIT! Rule. You will not be allowed to define a new one as GrooveIT! is not authorized to define multiple rules for the same Outlook folder.

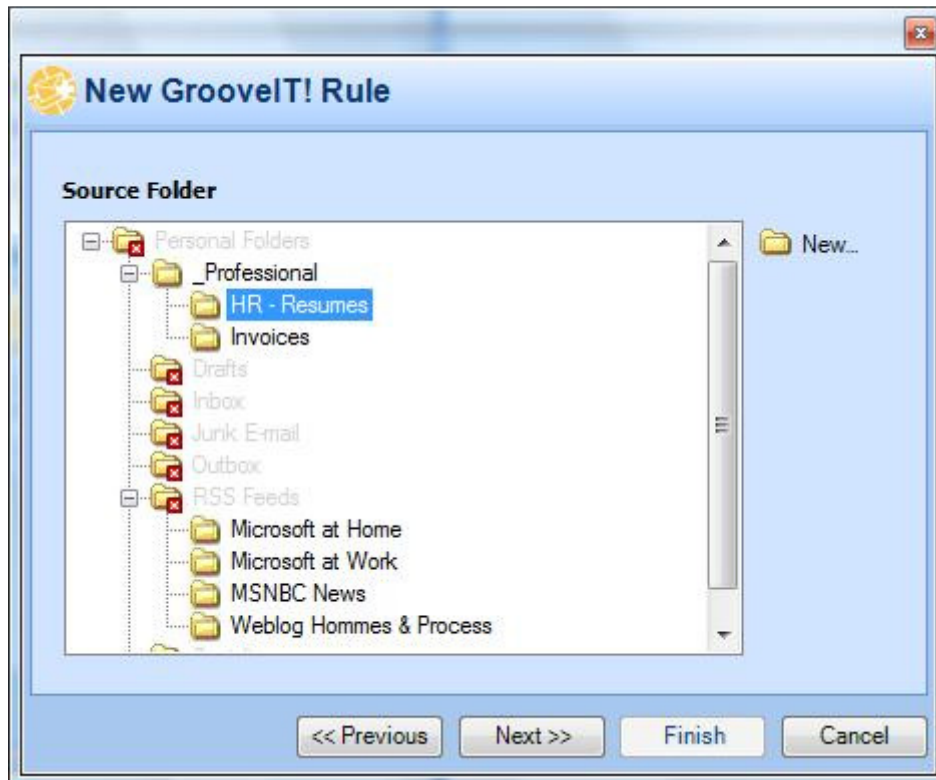


FIGURE 13: SELECTING THE SOURCE FOLDER

- ▶ Step 3: Identity and target workspace
  - Select a Groove identity
  - If you have only one identity on your computer, it is selected by default.
  - Select a workspace
  - A workspace filter is available to help you find the name of the target workspace for posting.
  - If you would like to create a new workspace, use the New... button located on the right side of the window. This will enable you to create a new target workspace for posting.

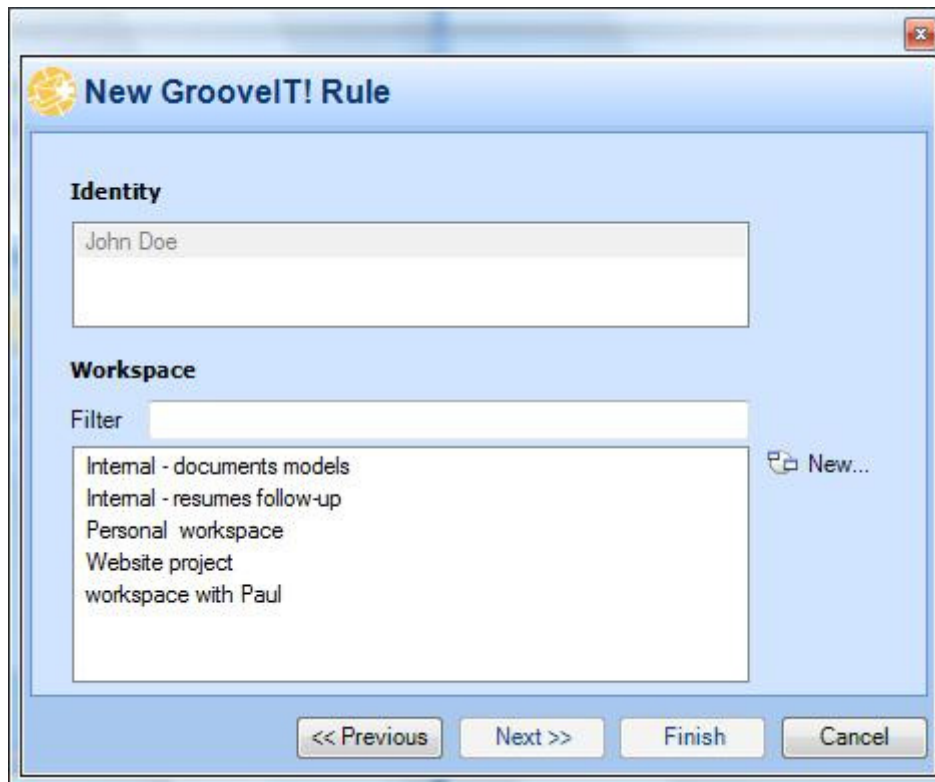


FIGURE 14: IDENTITY AND TARGET WORKSPACE

- ▶ Step 4: Creating a new workspace
  - Select a name for the new workspace.
  - Select contacts (sender and recipients of the e-mail message) to invite to the new workspace.
  - Use the Add button to add contacts to invite to the new workspace. Contacts come from your Outlook contact list.

- ▶ Step 5: Selecting target tools
  - Select a target tool where selected Outlook item(s) will be posted.
- ➔ You can also use the “New tool...” button to add a new tool that is more appropriate.

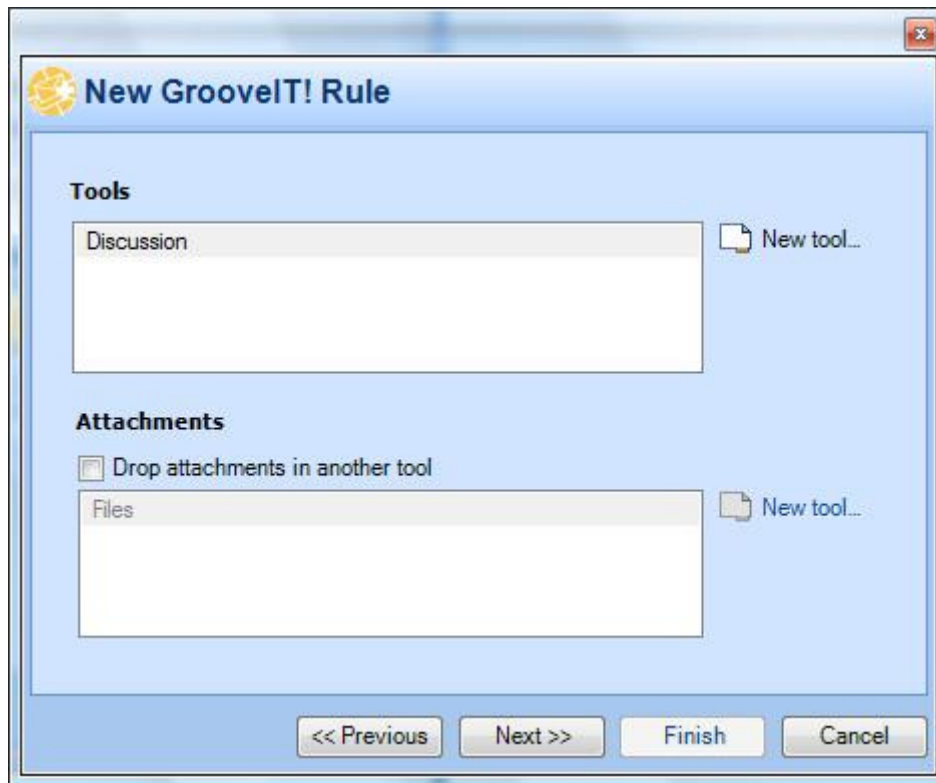


FIGURE 15: SELECTING TARGET TOOLS

- ▶ Step 6: Activating the GrooveIT! rule
  - Click “Finish”, the rule becomes active.
- ➔ If you choose not to activate the rule immediately, you will be able to activate it later from the Preferences menu.

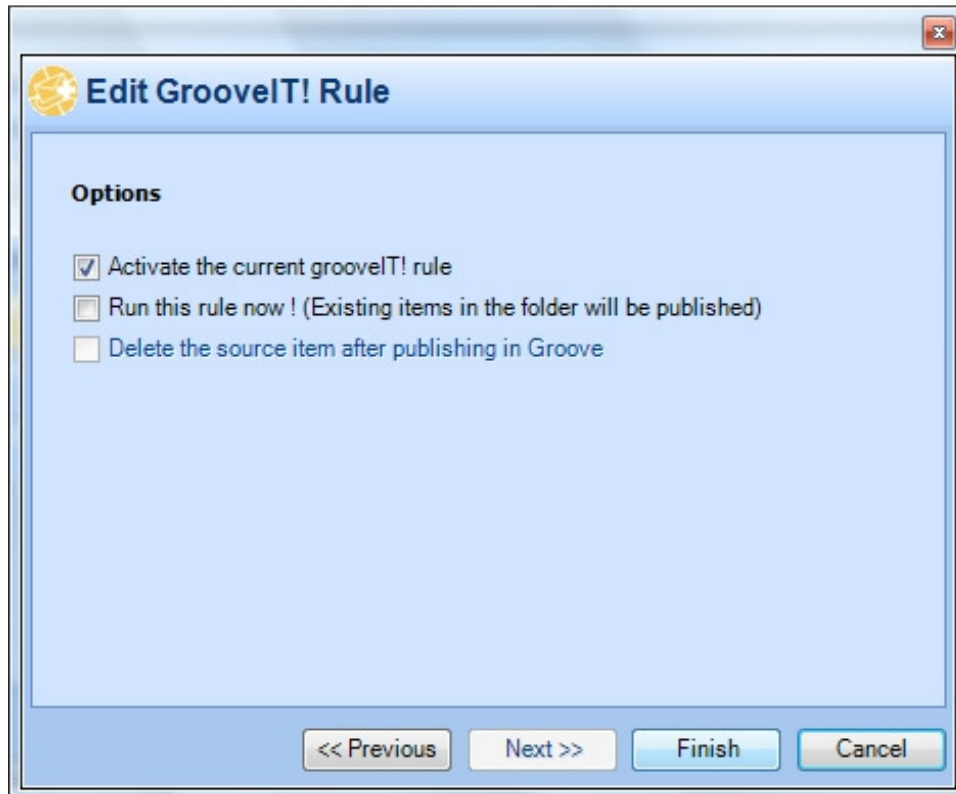


FIGURE 16: ACTIVATING THE GROOVEIT! RULE

## SENDING A GROOVE VCARD BY E-MAIL

With a single command, GrooveIT! enables you to create a new message with a Groove vCard attached. The content of the e-mail message is based on a template you can customize globally in the Preferences window or on-the-fly before sending the message. The message is composed and sent based on Outlook, so you can prepare and manage it the way you normally would.

### 3.3. Configuring GrooveIT!

#### DEFINING YOUR GROOVE vCARD

As explained in the Groove vCard tip, your Groove vCard must already be exported. In the menu Tools/Preferences, you can create a .VCG file by clicking the link *Save this contact as file*.

Once exported, you must define the path to your vCard for this feature to work.

*Note:* Once the path is defined, do not delete the vCard file as GrooveIT! looks for it each time you want to send an e-mail with your Groove vCard.

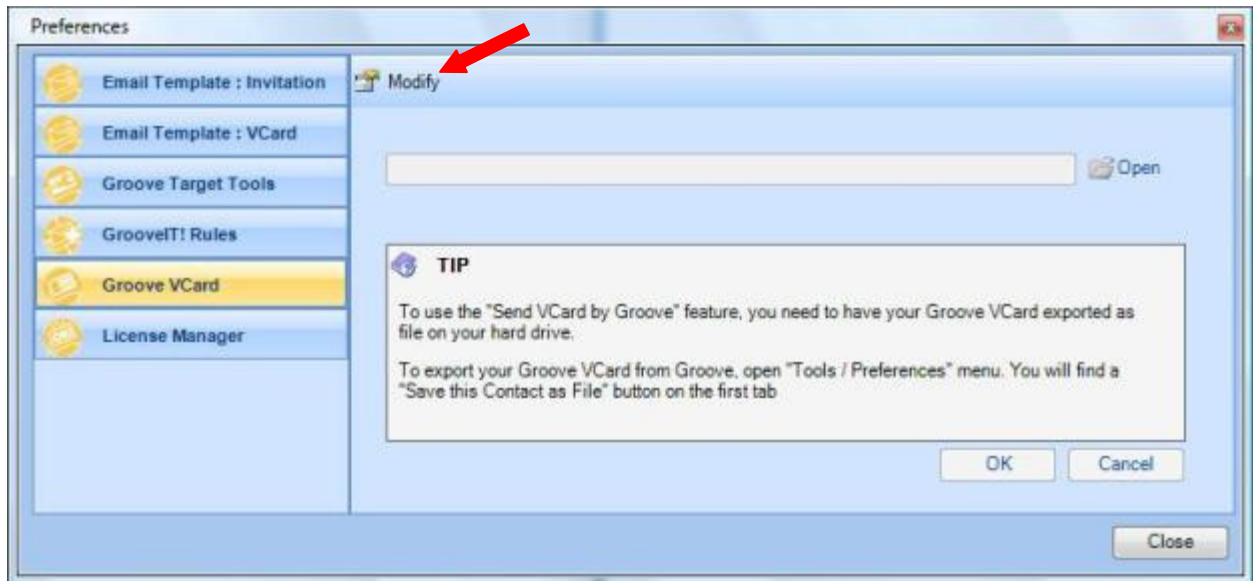


FIGURE 17: DEFINING YOUR GROOVE vCARD

#### CONFIGURING MESSAGE TEMPLATES

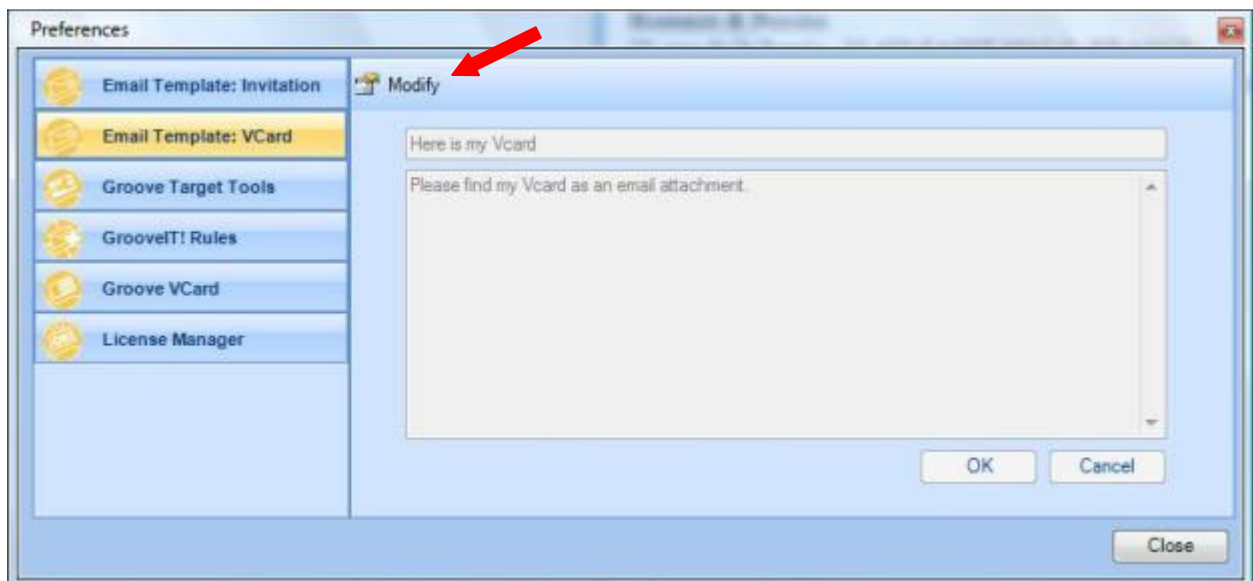


FIGURE 18: CONFIGURING MESSAGE TEMPLATES

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# CONFIGURING PROCESSING RULES

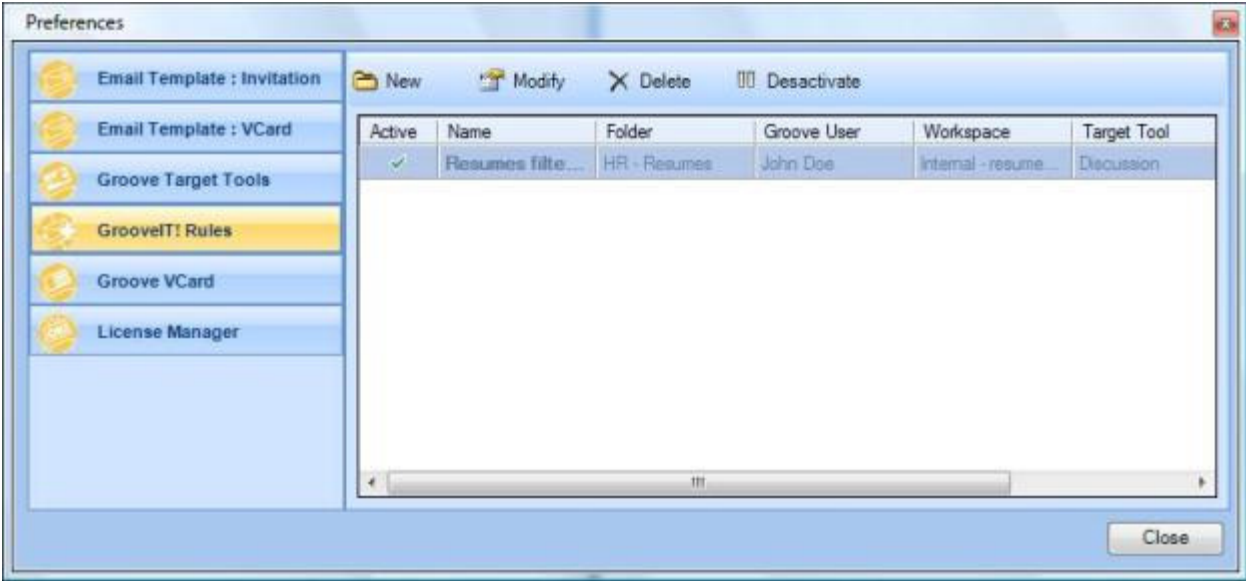


FIGURE 19: CONFIGURING GROOVEIT! RULES

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