Setting Up the Microsoft Outlook Add-in

What is the Microsoft Outlook Add-in?

The Microsoft Outlook Add-in is an integration that allows TempWorksTM users who are also working with Outlook to get the most out of their email and their database.

Note This add-in is a sidebar that can be utilized in both the Outlook desktop application and the web browserbased platforms. The Outlook Add-in does not work with the mobile Outlook application and mobile web browsers.

Note Currently, the Outlook Add-in is only available to our hosted clients & utilizes Beyond. If you have not set up Security Groups or utilized Beyond, please talk to your Account Manager first. In order to log messages within the Outlook Add-in and Beyond, each user will need to be part of a Message Action Security Group.

For information on system requirements see Microsoft's Requirements for Running Office Add-ins.

How Do I Start Using the Add-in?

In order to utilize the TempWorks Outlook Add-in, your Outlook Admin will first need to install the add-in for your email server.

Note The add-in is only available on messages and appointments while composing or reading. For a full list of limitations on the add-in see Microsoft's Outlook Add-in Overview.

With Outlook, there are 2 different kinds of email servers: On-premise (sometimes known as Exchange) OR Cloud (commonly known as 365 hosted). It's important to identify which email server you are utilizing before installing the add-in.

This Article Reviews:

- 1. On Premise Server Instructions
- 2. Cloud (365 hosted) Server Instructions
- 3. Rolling out the Add-in to Users

On-Premise Server Instructions:

- 1. Navigate to your email server's Outlook Admin Center
- 2. Select organization on the left and choose add-ins

1 Enterprise Office 365								
Exchange admin center								
recipients	ipients sharing add-ins address lists							
permissions								
compliance management	impliance management Add-ins let your users do and see more without leaving their mailbox. The following list shows add-ins that have been installed for the organization. Find more add-ins for Outlook at the Office Store							
organization	+- 🖉 🗄 8	+- ∕ m Ø						
protection	NAME		PROVIDER	USER DEFAULT	PROVIDED TO			
mail flow								
mobile								
public folders								
unified messaging								
servers								
hybrid								

3. Select the + icon to install a new add in and choose the option "Add from URL"

+- 🖉 🖻 €	
Add from the Office Store	
Add from URL	
Add from file	
My Templates	

4. Enter the URL: https://outlookaddin.ontempworks.com/configs/manifest.xml

🖼 Add from URL - Google Chrome				
https://mail.tempworks.com/ecp/Extension/OrgInst	allFromPrivate	Jrl.aspx?pwmc	id=7&R	et
Add from URL				
Enter the URL for the add-in manifest you want to install.				
*URL:				
https://outlookaddin.ontempworks.com/configs/manifest.xml				
	install و	Ca	ncel	

5. Select Install

Cloud (365 hosted) Server Instructions:

1. Navigate to your Microsoft 365 Admin Center

2. Select Settings > Services & add-ins on the left

-	Microsoft 365 admits entre							
	<	Home	> Services & add-in	15				
ŵ	Home		+ Deploy Add-In	View Add-ins	¥	Search [Search for add-ins and services	٩
8	Users 🗸 🗸		Name 🗸				Host Apps	Status
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ŝ	Settings							
	Services & add-ins							
	Security & privacy							

- 3. Select the Deploy Add-in option
- 4. Choose the "I have a URL for the manifest file." option

1	Deploy Add-In
orado	Centralized Deployment
	I want to add an Add-In from the Office Store.
interf.	I have the manifest file (.xml) on this device.
	Browse
	I have a URL for the manifest file.
	Next Cancel

- 5. Enter the URL: https://outlookaddin.ontempworks.com/configs/manifest.xml
- 6. Select Next to install

Rolling Out the Add-in to Users:

Once the add-in has been installed to the email servers, you will have a few options for rolling out the add-in to your

company. Double click on the add-in if you do not see these options.

🖼 Edit Add-in settings - Google Chrome	_ □ ×
https://mail.tempworks.com/ecp/Extension/OrgEditApp.a	vs spx?pwmcid=8&ReturnObjectType=1&
TempWorks	
 Make this add-in available to users in your organization Specify user defaults: Optional, enabled by default Optional, disabled by default Mandatory, always enabled. Users can't disable this add-in. 	If you clear this check box, the app will be disabled for your organization.
	Save Cancel

Option 1: Enabled by default

This option will automatically turn this add-in on for all email users on your server. They will then be able to turn it off if they no longer want to utilize it.

Option 2: Disable by default

This option will add the Outlook add-in option for all users. Users will need to select the add-in in order to use it.

To select the add-in:

- 1. Email users will be able to turn on the add-in by navigating to the web version of their Outlook.
- 2. From here, login with your credentials. Be sure to include your domain:

Domain\user name:
⊖ sign in

- 3. Once you are within your inbox, select the gear in the upper right portion of the screen. Then select 'Manage add-ins'
- 4. The add-in should already be installed by your administrator for you. Simply select the 'Turned on' check box:

Manage add-ins

Add-ins are built by third parties and bring additional features to your Outlook experience. The following list s

+ - 3			
Name	Provider	Installed by	Turned on
TempWorks	TempWorks Software	Your admin	
		-	

Option 3: Mandatory, always enabled

This option will automatically turn this add-in on for all email users on your server. Users will not be able to remove the add-in themselves.

Related Articles