



PureConnect®

2023 R3

Generated:

09-November-2023

Content last updated:

08-May-2019

See **Change Log** for summary of changes.



Microsoft Outlook Interaction Desktop Add-In Installation and Configuration Guide

Abstract

This installation guide provides detailed steps for installing the Microsoft Outlook Interaction Desktop Add-in. It provides an overview of post-installation actions such as configuration, repair and removal operations, and updates. It also includes basic instruction for using these applications.

For the latest version of this document, see the PureConnect Documentation Library at: <http://help.genesys.com/pureconnect>.

For copyright and trademark information, see
https://help.genesys.com/pureconnect/desktop/copyright_and_trademark_information.htm.

Table of Contents

Table of Contents	2
Introduction	3
Requirements	4
Installation and Updates	5
Licensing	5
Installation	6
Installation Prerequisites	6
Change Log	9

Introduction

PureConnect offers an Add-In component that integrates Microsoft Outlook with the Interaction Desktop.

When this add-in is installed, you can perform the following action directly from the Outlook user interface:

- View user status as shown in CIC
- Call a user from an e-mail message, contact, or meeting notice

For more information about the features and function of this add-in, see "[Working with the Microsoft Outlook Interaction Desktop Add-In](#)."

Requirements

This section describes the software requirements for the Microsoft Outlook Interaction Desktop Add-In.

The Microsoft Outlook Interaction Desktop Add-In is installed on a CIC 2015 R1 or later client workstation with Interaction Desktop installed. The workstation must meet the requirements stated in *IC Installation and Configuration Guide*, "Client Workstation".

Note: The CIC product suite has a new distribution model with new naming, faster release cycles, and higher quality. CIC 4.0 SU 6 was the last release using the older model. CIC 2015 R1 is first of the new releases. CIC 2015 R1 or later can be applied to any CIC 4.0 SU.

The specific requirements for the Microsoft Outlook Interaction Desktop Add-In are:

- 32-bit Microsoft Outlook 2010 SP1
- Interaction Client Outlook Add-in license and Client Access license
- Visual Studio 2010 Tools for Microsoft Office (32-bit and 64-bit)
- Microsoft Office Primary Interop Assemblies 2010

If the last three prerequisites are not already installed, they are installed automatically when you install the Microsoft Outlook Interaction Desktop Add-In.

Note: See https://help.genesys.com/cic/mergedProjects/wh_tr/mergedProjects/wh_tr_installation_and_configuration/desktop/software_requirements.htm for the most up-to-date list of software requirements.

Installation and Updates

When you install CIC 2015 R1 or later to the IC Server, a Microsoft Outlook Interaction Desktop Add-in plugin install is added to the IC User Applications (32-bit and 64-bit) shared directories on the IC Server.

Install the Microsoft Outlook Interaction Desktop Add-in from the share drive on the IC Server.

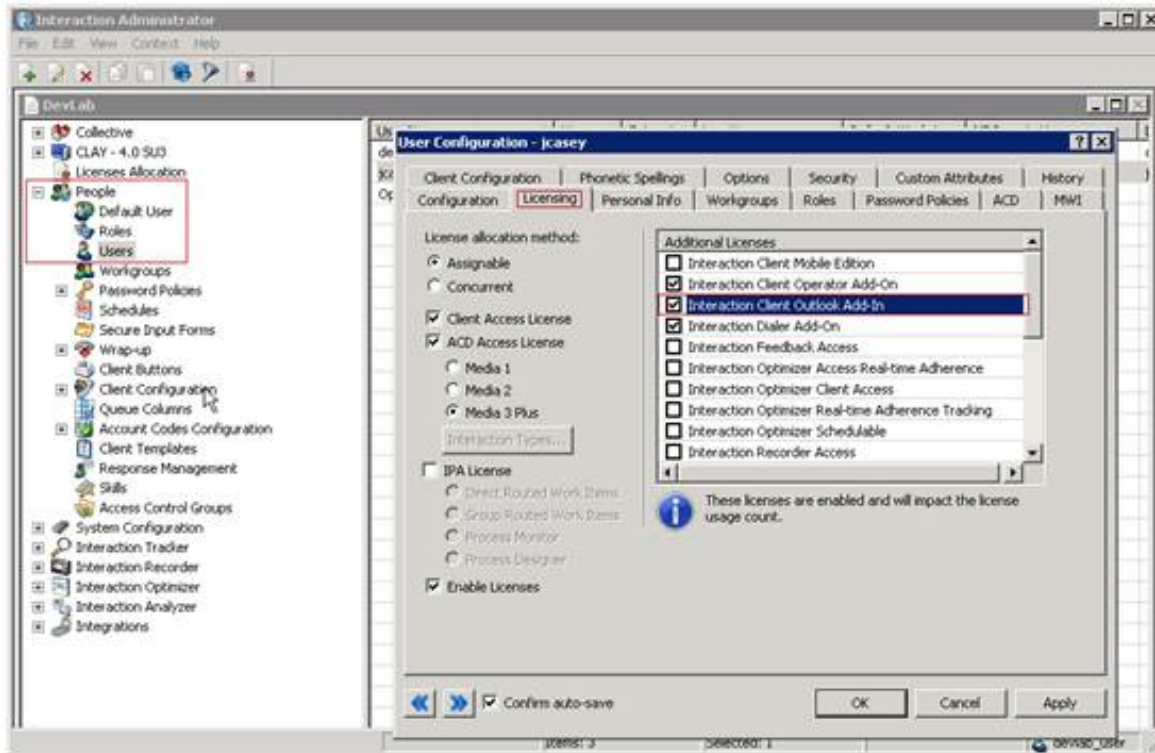
- [Licensing](#)
- [Installation](#)

Licensing

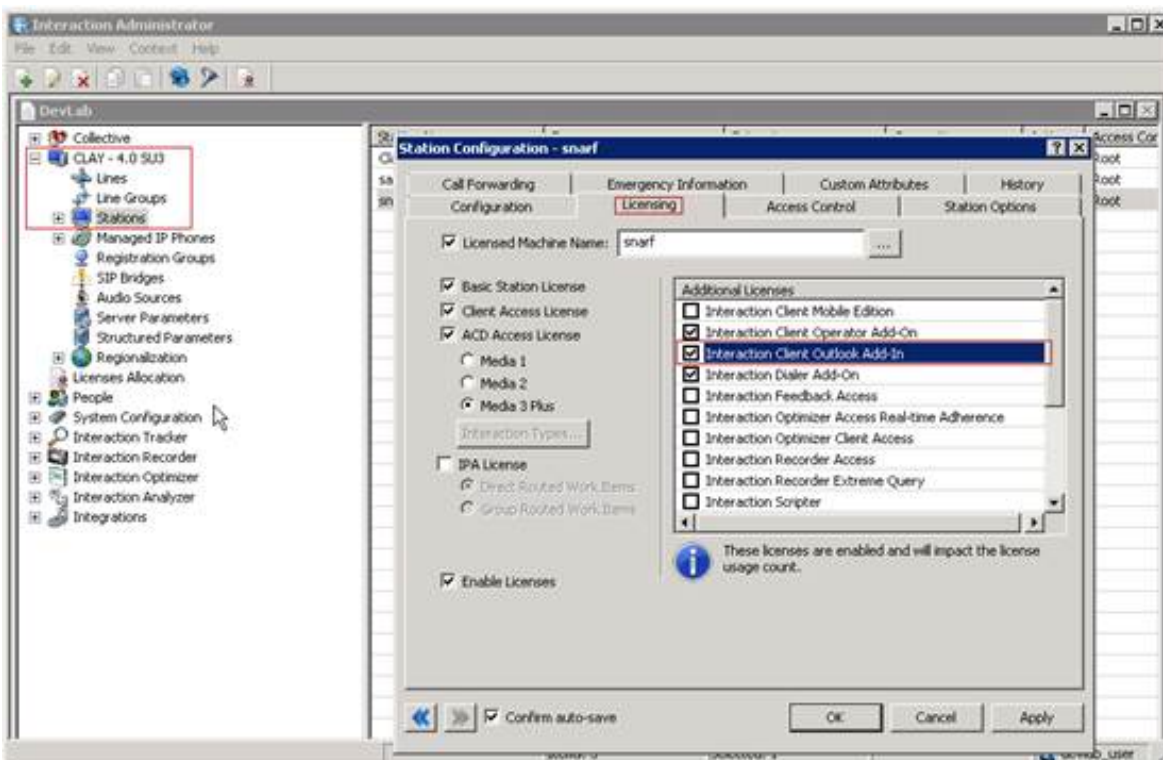
You must use Interaction Administrator to license the Outlook Interaction Desktop Add-In to the station and to each user of the station. The Microsoft Outlook Interaction Desktop Add-in license and the Client Access license are required

The licenses must be enabled by selecting **Enable Licenses** on the **Licensing** tab of the **User Configuration** and **Station Configuration** dialog boxes, as shown in the following two figures.

The following figure shows the *user* licenses:



The following figure shows the *station* licenses:



Installation

Follow these instructions to install the Microsoft Outlook Interaction Desktop Add-In.

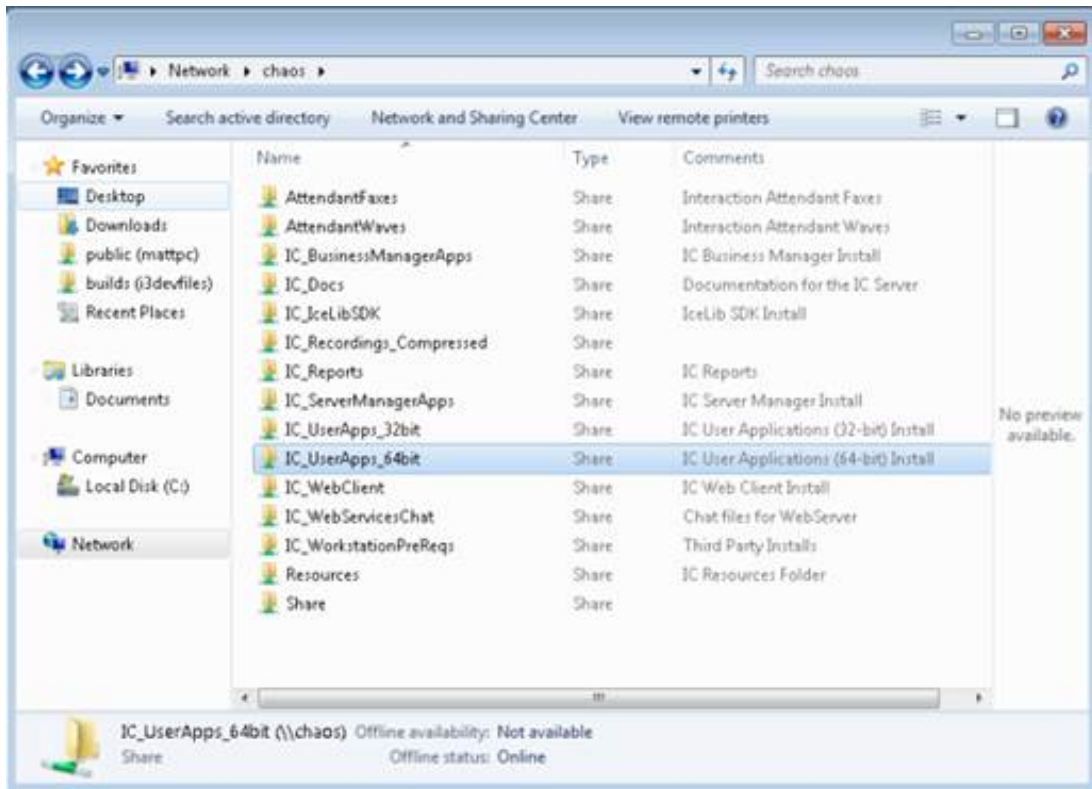
Installation Prerequisites

Before installing the Microsoft Outlook Interaction Desktop Add-In, make sure that the prerequisites described in [Requirements](#) are fulfilled.

1. On the client workstation, browse to the share drive on the IC Server.

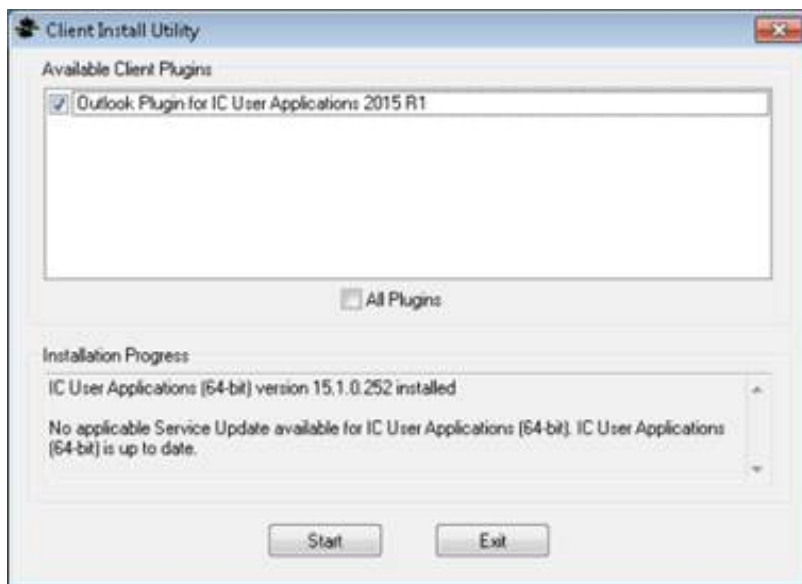
You must choose the appropriate subdirectory for 32- or 64-bit applications, for example, `\\servername\IC_UserApps_32bit` or `\\servername\IC_UserApps_64bit`.

The following figure shows an example of the share drive:



2. Run setup.exe.

A dialog box opens showing the options that you can install. The following example shows the Outlook Plugin for IC User Applications 2015 R1:

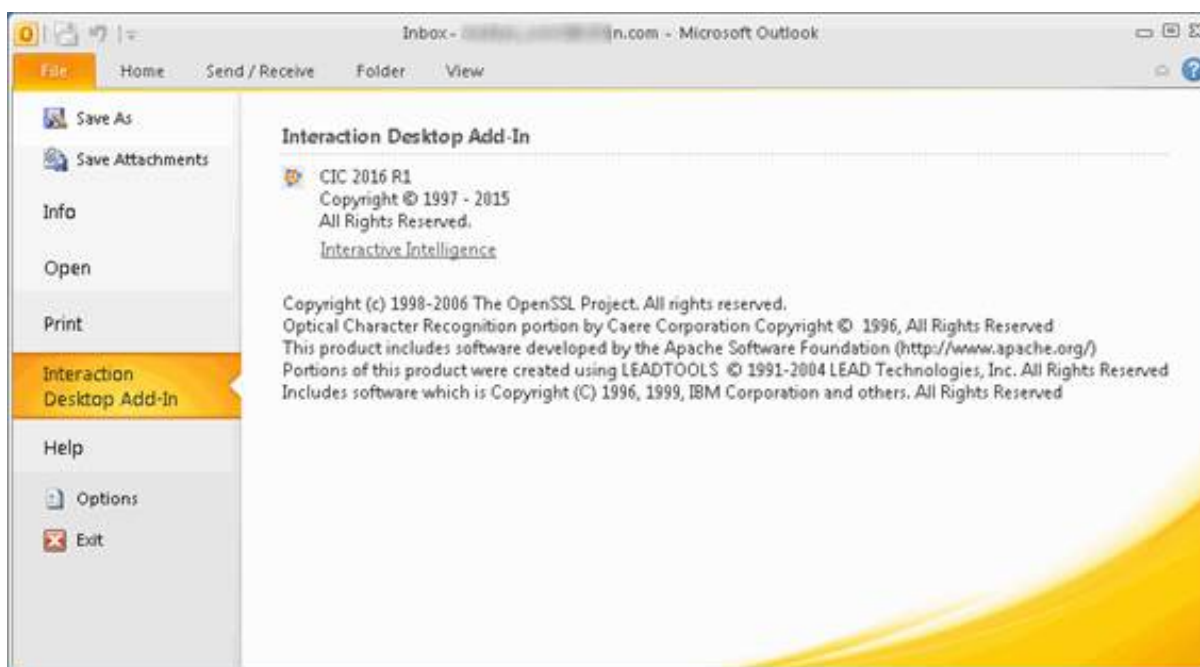


3. Select the Outlook Plugin for IC User Application to install, and then click **Start**.

When installation is complete, the dialog box displays the message:

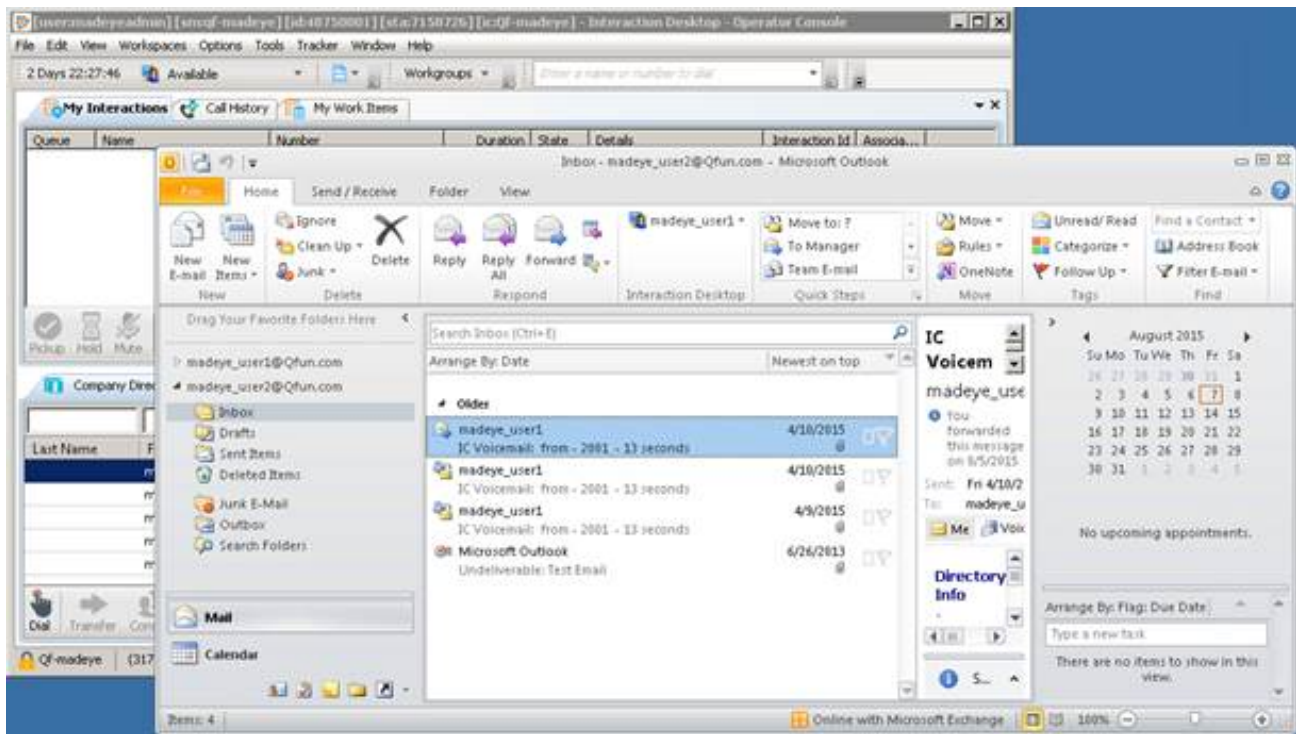
Finished processing installs for client workstation applications and selected language plug-ins, if applicable.

4. Click **Exit**.
5. After installation, select **File** in Outlook to verify that the Interaction Desktop Add-In has a properties page, as shown in the following figure:



This page has no options that you can configure.

The **Home** tab of the main Outlook window also has an Interaction Client tool as shown in the following figure:



After you sign in, similar Interaction Desktop tools are available in message windows, contacts, and meeting invitations.

Change Log

Date	Changes
27-February-2013	Initial document released.
04-March-2013	Outlook client requirements added.
30-July-2014	Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to Interactive Intelligence Product Information site URLs, and copyright and trademark information.
21-August-2015	<ul style="list-style-type: none">• Updated cover page and copyright page.• Changed Interaction Client .NET Edition to Interaction Desktop.• Changed name from Microsoft Outlook Interaction Client Add-in to Microsoft Outlook Interaction Desktop Add-in.• Updated screen shots for name change and rebranding.
18-April-2016	Fixed minor typo.
18-January-2018	Rebranded this document to apply Genesys lexicon.
02-February-2018	Converted to HTML.
08-May-2019	Reorganized content, added links. For more details, see CICDOC-183 .