How to Set Outlook to Use Project Server

This article is about setting Outlook (2003 or 2007) so that it synchronizing with a Project Server documents or so that it will receive the emails sent by Project Server 2007.

Before getting to the Outlook piece, you need to be able to use the PWA. Once you have the ability to use PWA, then follow these instructions. After setting up Outlook, you also have to make sure that Outlook security settings aren't marking the Project emails as spam or as a phishing attempt. Those instructions are listed below as well.

Set up Outlook

1. Trust the Site

Inside Internet Explorer, go to *Tools > Internet Options > Security> Trusted sites*.

- If you want to use Outlook Integration, then click on **Custom Level …** , make sure that the bottom setting **User Authentication: Logon** is set to **Automatic logon with current username and password.**
- If you want to use OLAP functionality, then click on **Custom Level …** , make sure that the Miscellaneous setting **Access data sources across domains** is set to **Enable.**
- Click on **Sites** and then add the server. Even if you do not do the above two steps, this last step is necessary for Project Professional and PWA access.

2. Seamless Office Integration

Users with administrative access to their PC running Windows XP or Vista Professional can enable seamless Office integration. This allows users to (a) access EPM through Outlook, (b) automatically connect Project Professional to Project Server, and (c) avoid authentication prompts when opening SharePoint documents. To do this:

- Log in as the Administrator of your PC (this is often the default account, but you must be logged in as Administrator to have this functionality)
- In your *Control Panel*, click on **User Accounts**

- Click on the **Administrator** account and under *Related Tasks* on the left, click on **Manage my Network Passwords**
- Add your Project Server's IP address, along with the EPM user name and password provided to you by your administrator.

3. Outlook Setup

Seamless Office Integration (see above) is required to access EPM through Outlook. You must also enter the following configuration settings:

- From your PWA home page, click on **Personal Settings** then **Set up Outlook Synch**
- Download the Outlook PWA add-in
- Within Outlook on your local PC, choose ***Tools > Options > Project Web Access > Advanced Options [for Outlook 2007] > Enter Login Information***
- Enter your Server URL, check **Use Windows User Account**, and click **OK**.

Synchronize Documents

If you want to have documents associated with a specific project available to you when you are offline and within Outlook follow these steps. In the Project Documents section, click on "Actions" and select "Connect to Outlook".

Then, a pop up should appear asking you if you want to connect to a specific library. Answer "Yes" and Outlook will begin downloading and synchronizing documents. It will create a new "SharePoint List" section in Outlook.

Make sure emails/documents aren't Spam or Phishing

After importing new assignments for the first time, check the "Spam Email" folder in Outlook to confirm that the emails from the server didn't land there. If the email is not in a Spam folder, Outlook may still consider this to be a phishing attempt. To determine if Outlook is flagging the message, open the email and look at the heading information. If there is an issue, it will look something like this:

The way to let Outlook know that this is a valid email coming from a valid address is to right click on the box. Then, a drop down menu with a few options will appear that should look like this:
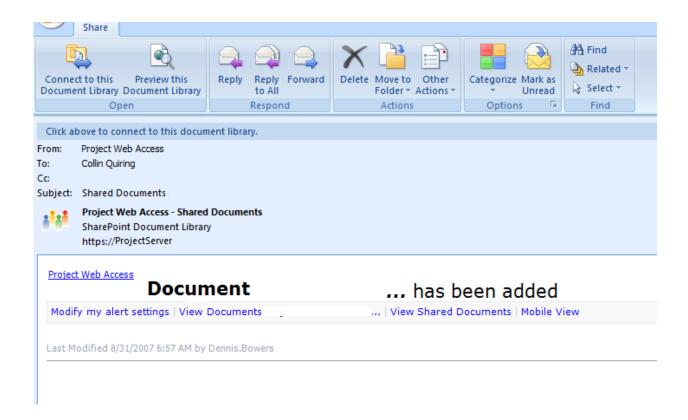

It is recommended that you select each option - they are selected one at a time so you will have to right-click three separate times to do all three.

After these settings are changed, any future emails from the Project Server should look similar to this:

Note that on the top of the email options exist to connect directly to the document library. Also, the ability to open PWA, modify alerts, view the documents or view all documents are available from links within the email.