



# Caesar for Outlook Installation and Troubleshooting

# Content

|                                                        |           |
|--------------------------------------------------------|-----------|
| <b>Introduction</b> .....                              | <b>3</b>  |
| <b>Installation methods</b> .....                      | <b>4</b>  |
| Single User.....                                       | 4         |
| Installation files.....                                | 4         |
| Registry keys .....                                    | 4         |
| All Users .....                                        | 5         |
| Installation files.....                                | 5         |
| Registry keys .....                                    | 5         |
| <b>Installation flow</b> .....                         | <b>6</b>  |
| Default.config.....                                    | 6         |
| Settings.....                                          | 7         |
| Unchanged Default.config.....                          | 8         |
| Customized Default.config.....                         | 8         |
| User.config.....                                       | 9         |
| Settings.....                                          | 9         |
| Administrative installation .....                      | 10        |
| <b>Example</b> .....                                   | <b>11</b> |
| Standard installation .....                            | 11        |
| Customized.....                                        | 13        |
| <b>Troubleshooting</b> .....                           | <b>14</b> |
| Incorrect path .....                                   | 14        |
| Check the path.....                                    | 14        |
| <b>Repairing CFO</b> .....                             | <b>16</b> |
| Upgrade .....                                          | 16        |
| Incorrect installation.....                            | 16        |
| Clean up the Registry .....                            | 17        |
| <b>Remains from an old installation</b> .....          | <b>18</b> |
| <b>Unable to find local Outlook installation</b> ..... | <b>19</b> |

# Introduction

This document describes where files and keys are installed on a client for Caesar for Outlook.

They are written to different places depending on whether it is a "Single User" or "All Users" installation.

When installing it is important to choose the correct method. If you e.g. install CFO as "Single User" and then upgrades using "All Users", registry entries will become incorrect and CFO stops working.

**NOTE!** If you change method you have to first un-install the old version.

This is due to how MSI is built up ("by Microsoft design"). MSI is unable to detect if a program is installed as "Single" or "All".

Abbreviations used in the document.

**HKCR** HKEY\_CLASSES\_ROOT

**HKCU** HKEY\_CURRENT\_USER

**HKLM** HKEY\_LOCAL\_MACHINE

**CFO** Caesar for Outlook

# Installation methods

## Single User

When you select to install CFO as “Single User”, then all files are written locally for that specific user.

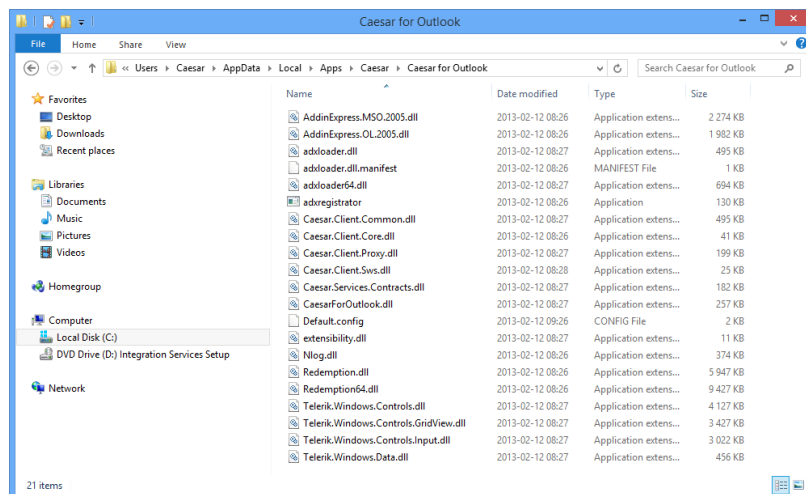
The program may then not be used by another user logging on to the same machine.

For another user to work with CFO on the same machine you must install the program in that user’s context i.e. install the program when logged in as the new user. This requires installation permission.

## Installation files

All files belonging to CFO are installed in the following folder:

**%LOCALAPPDATA%\Caesar\CesarClient\CesarForOutlook**

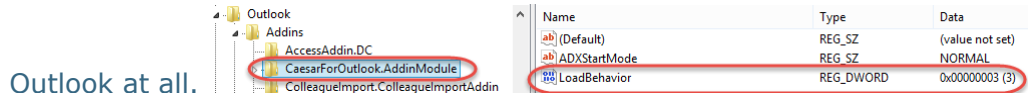


## Registry keys

The key **CaesarForOutlook.AddInModule** is written to the following location in the Registry:

**HKCU\Software\Microsoft\Office\Outlook\AddIns**

Here the **LoadBehavior** must be set to the value **3** for CFO to be loaded in



Outlook at all.

---

## All Users

When you select to install CFO for “All users” on a machine, files are written to folders that are accessible for all users.

The program may then be used automatically by another user that logs on to the same machine i.e. all files belonging to the new user will be automatically installed when CFO is started for the first time.

### Installation files

All files belonging to CFO are installed in the following folder:

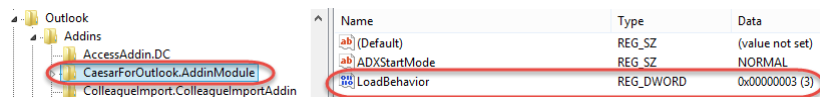
**%PROGRAMFILES(X86)\Caesar\CesarForOutlook**

### Registry keys

The key **CaesarForOutlook.AddInModule** is written to the following location in the Registry:

**HKLM\Wow6432node\Software\Microsoft\Office\Outlook\AddIns**

Here the **LoadBehavior** must be set to the value **3** in order for CFO to be loaded in Outlook at all.



# Installation flow

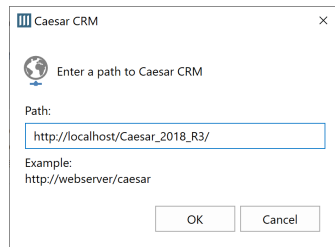
## Default.config

Default.config is only used when distributing an installation so that the user does not have to enter the Caesar CRM URL and other settings when Outlook is started for the first time after installation.

If you haven't entered an URL in the file default.config, the following will take place after the installation of CFO (regardless of how or from where the installation is run):

Default.config is placed in %PROGRAMFILES(X86)%\Caesar\Cesar for Outlook.

When you start Outlook for the first time a dialog is displayed:

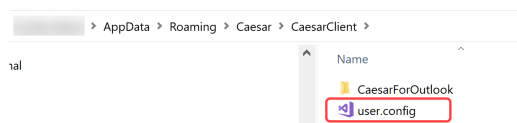


Here is where you type the path (URL) to the Caesar web server in the format:

`https://<Your Web Server>/<Instance>`

When you save the settings in the dialog the file user.config is created in

`%APPDATA%\Caesar\CesarClient`



**NOTE:** Settings in Default.config never overwrites settings made in **user.config**.

## Settings

In the standard installation package, the file looks like this:

```
<?xml version="1.0" encoding="utf-16" ?>
<configuration>
<BaseUrl>http://webserver/caesar</BaseUrl>
<!--
Uncomment these lines to change the default behavior
<LockedBaseUrl>false</LockedBaseUrl>
<BrowserUrl>http://webserver/caesar</BrowserUrl>
<UseSingleSignOn>true</UseSingleSignOn>
<UseTrace>false</UseTrace>

These settings are for customers using a customized authentication
proxy server
<ProxyUrl>http://webserver/caesar</ProxyUrl>
<LockedProxyUrl>true</LockedProxyUrl>

<AuthorizationMethod>bearer</AuthorizationMethod>
<AppointmentTypeFree></AppointmentTypeFree>
<AppointmentTypeWorkingElsewhere></AppointmentTypeWorkingElsewhere>
<AppointmentTypeTentative></AppointmentTypeTentative>
<AppointmentTypeOutOfOffice></AppointmentTypeOutOfOffice>
-->
</configuration>
```

If you do not want to use the settings in this file, you can ignore the rows in the file using the tags `<!--` with end tag `-->`.

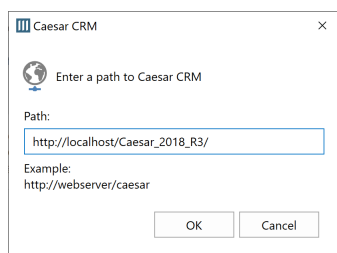
In the above case the settings in italic will be ignored.

## Unchanged Default.config

If you haven't changed anything in this file (standard installation) a default.config file without customizations will reside in:

%PROGRAMFILES(X86)%\Caesar\Cesar for Outlook.

At Outlook start-up on the client a CFO-dialog will display in which you enter Path/URL to Caesar CRM.



When set the file **user.config** is created in the folder:

%APPDATA%\Caesar\CesarClient

With the URL entered:

```
<?xml version="1.0" encoding="utf-16"?>
<configuration version="2.5.7354">
  <system>
    <BaseUrl>https://<Your Web Server>/<Instance>/BaseUrl</BaseUrl>
  </system>
-----
```

## Customized Default.config

If you set a URL in default.config (and other settings) the installation will use the file and those customizations.

Default.config is only used when distributing the program so the user does not have to type the URL when Outlook is started for the first time after installation.

Default.config is placed in %PROGRAMFILES(X86)%\Caesar\Cesar for Outlook.



---

## User.config

This file is never created by the installation. It is only created when you enter the URL at Outlook start-up or change settings for CFO through the Outlook Caesar CRM menu.

If user.config file exists, that file is always used even if a default.config file exists.

If you e.g. upgrade and change the default.config settings, CFO will still use the settings from user.config.

This means that if you change the web address to the Caesar CRM server you have to either change the URL manually on each client in the Outlook menu or remove user.config on each client and distribute a new URL via Default.config.

### Settings

```
<?xml version="1.0" encoding="utf-16"?>
<configuration version="2.5.7354">
  <system>
    <BaseUrl>https://<Your Web Server>/<Instance></BaseUrl>
  </system>

  <application>
    <UseCalendar>true</UseCalendar>
    <CurrentConnectionKey>0x77A8F9875E78E0439639EEC3AA60B77D</CurrentConnectionKey>
    <ParentConnectionKey>DB:0xABBD76C4E9E0F44EBB399A0E7C80A4F0</ParentConnectionKey>

    <LastCaesarLogin></LastCaesarLogin>
    <LastCaesarPasswordEncrypted></LastCaesarPasswordEncrypted>
    <RememberCaesarPassword>true</RememberCaesarPassword>
    <LastWebServerLogin></LastWebServerLogin>
    <UseSingleSignOn>>false</UseSingleSignOn>

    <LastSelectCustomerSearchProviderID>22fe307e-6b03-439a-8399-f98fc6bc8abe</LastSelectCustomerSearchProviderID>
    <LastSelectPersonProviderID>5df940bd-0334-47a2-99b6-ac0f7b85224d</LastSelectPersonProviderID>
    <LastAuthProvider>b3e13e73-a3d5-4dd1-a750-dab10dad2af7</LastAuthProvider>
    <ExpandNotebookOnOpen>true</ExpandNotebookOnOpen>

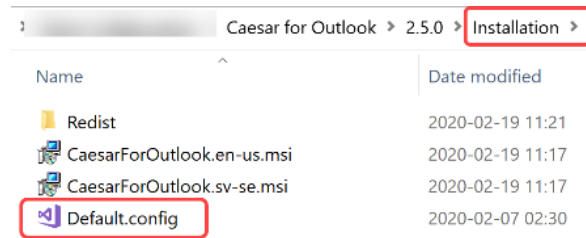
  </application>

</configuration>
```

---

## Administrative installation

To be able to install CFO from a central location the file Default.config must reside in the installation folder e.g.:



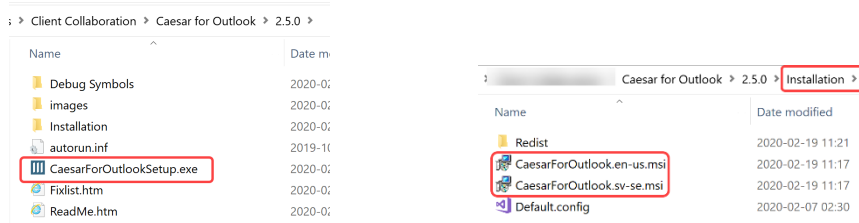
| Name                       | Date modified    |
|----------------------------|------------------|
| Redis                      | 2020-02-19 11:21 |
| CaesarForOutlook.en-us.msi | 2020-02-19 11:17 |
| CaesarForOutlook.sv-se.msi | 2020-02-19 11:17 |
| Default.config             | 2020-02-07 02:30 |

Please also refer to the ReadMe file in the installation for details.

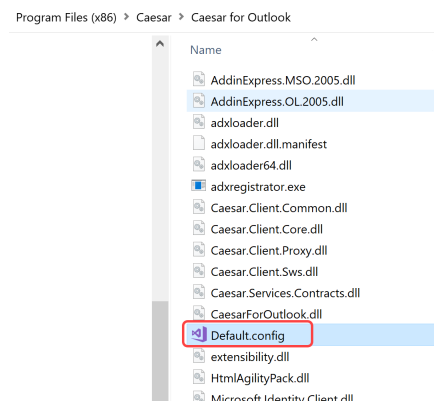
# Example

## Standard installation

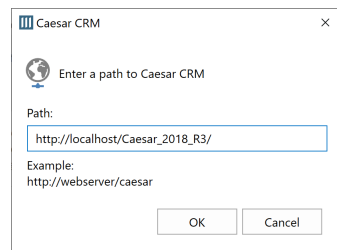
- 1) Close Outlook
- 2) Install CFO
- 3) Double-click on either the .exe file or one of the msi-files



- 4) When the installation is finished the Default.config file will exist in  
`%PROGRAMFILES(X86)%\Caesar\Caesar for Outlook`



- 5) Start Outlook
- 6) The dialog in which to set the path is displayed



- 7) Enter the Path/URL to Caesar CRM
- 8) Click **OK**

The **User.config** has now been created in `APPDATA%\Caesar\CaesarClient` and contains the entered path:

AppData > Roaming > Caesar > CaesarClient >



```
<?xml version="1.0" encoding="utf-16"?>
<configuration version="2.5.7354">
  <system>
    <BaseUrl>http://localhost/Caesar_2018_R3</BaseUrl>
  </system>
  -
</configuration>
```

From now on you can never change the URL or other settings through the installation.

To change the URL, you must perform one of the following actions:

- 1) Change the setting from within Outlook > Caesar CRM > System settings
- 2) Physically change the file user.config file
- 3) Replace the user.config file with another user.config file
- 4) Remove the user.config file to enable use of default .config

**NOTE:** All settings made by the user such as calendar integration, time frame and logging etc. will disappear.

If a default.config file exists on the client containing a proper URL this setting will then be picked.

## Customized

1) Enter URL, and other settings you want to control centrally, in the Default.config file

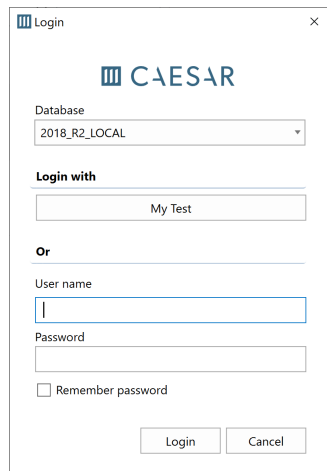
```
<?xml version="1.0" encoding="utf-16" ?>
```

```
<configuration>
```

```
    <BaseUrl>http://localhost/Caesar_2018_R3/</BaseUrl>
```

2) Run the installation

3) No dialog for entering URL will display and you can log in to Caesar CRM:



The screenshot shows a 'Login' dialog box for Caesar CRM. At the top, it displays the Caesar logo and the text 'CAESAR'. Below this, there is a 'Database' dropdown menu with '2018\_R2\_LOCAL' selected. A section titled 'Login with' contains a button labeled 'My Test'. Below this, an 'Or' separator is followed by a 'User name' text box containing the letter 'I', a 'Password' text box, and a checkbox labeled 'Remember password'. At the bottom, there are 'Login' and 'Cancel' buttons.

# Troubleshooting

If the tab Caesar CRM doesn't show in i MS Outlook, then the Add-In has not been loaded.

This may be due to one of the following:

9) The path from where CFO should be loaded is incorrect.

10) Another Outlook Add-In interferes with CFO

In most cases it is due to that the path is incorrect.

## Incorrect path

That the path has become incorrect may be due to:

11) You have upgraded and then installed with another method than the one for the existing version (ref. [Installation methods](#))

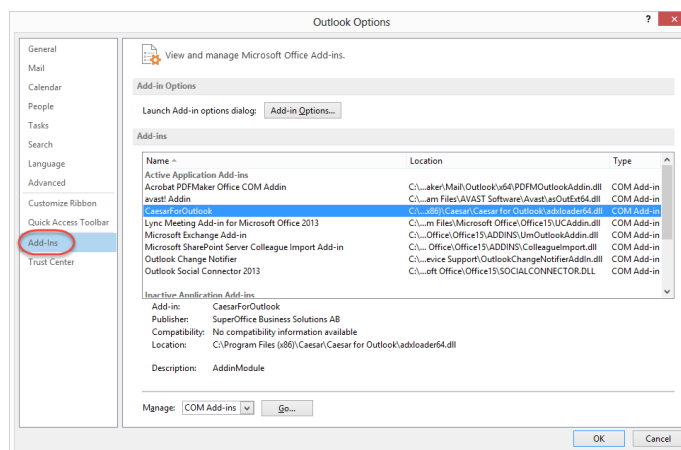
12) The installation has failed.

Then you may have mixed keys in the Registry. This may be corrected by following the steps in the chapter [Repairing CFO](#).

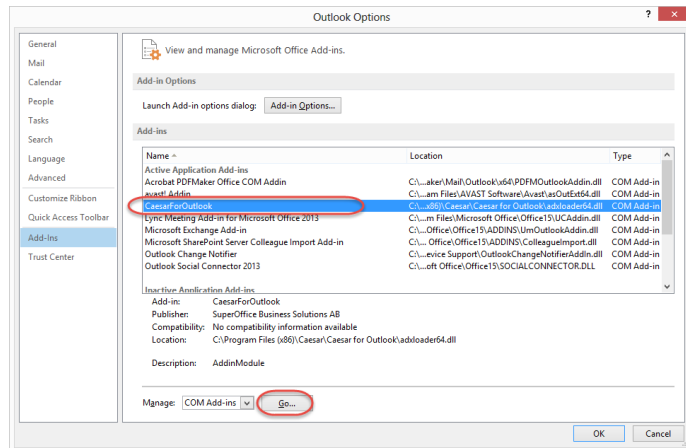
## Check the path

It is important that Outlook points to the correct program and folder. This can be checked using the following steps:

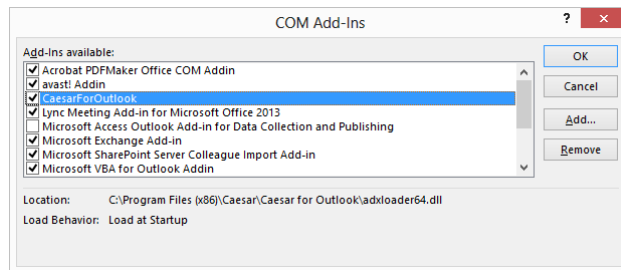
13) In MS Outlook, select **File > Options > Add Ins**



14) Select **CaesarForOutlook** in the right-hand list.



15) Click **Go..** next to **Manage** at the bottom of the window.



16) Click CaesarForOutlook.

17) In the path next to **Location** it says where Outlook is trying to load the file from.

18) Check that the file **adxloader64.dll** exists in the path.

# Repairing CFO

If the Registry is incorrect you can first try to un-install and then reinstall again.

Or you can un-install and clean up the Registry using below steps.

**NOTE!** Always backup the Registry before making any changes.

---

## Upgrade

The old version remains together with the new one (check under the **Control panel > Programs and Features**)

19) Un-install the older version in Control panel > Programs and Features.

20) Clean up the Registry.

21) Then run a **Repair** of the program in Control panel > Programs and Functions

---

## Incorrect installation

22) Un-install CFO in Control panel > Programs and Features

23) Clean up the Registry

24) Re-install CFO.

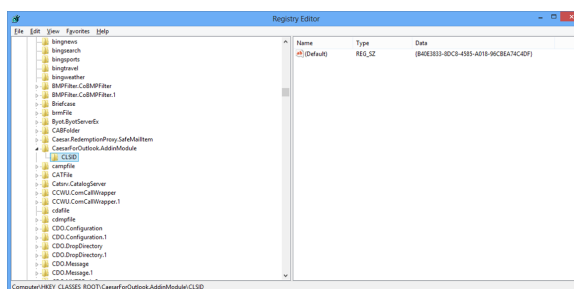


# Clean up the Registry

25) Start the Registry Editor (regedit.exe).

26) Go to:

**HKCR**\CaesarForOutlook.AddinModule\CLSID\CaesarForOutlook.AddinModule



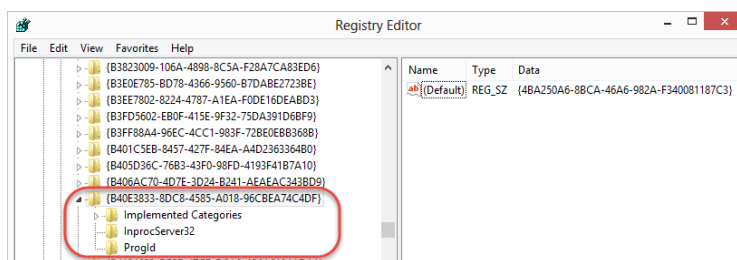
27) Double-click the **Default** value and copy the content (GUID):

{B40E3833-8DC8-4585-A018-96CBEA74C4DF}

Remove:

**HKCR**\CaesarForOutlook.AddinModule\CLSID\CaesarForOutlook.AddinModule

28) Select **Edit > Find** in the menu and look for the GUID you copied earlier.



29) Remove the key

{B40E3833-8DC8-4585-A018-96CBEA74C4DF}

30) Go to

**HKCU**\Software\Microsoft\Office\Outlook\AddIns  
Remove: CaesarForOutlook.AddinModule

31) Go to

**HKLM**\Software\Microsoft\Office\Outlook\AddIns  
Remove: CaesarForOutlook.AddinModule

32) Go to

**HKLM**\Wow6432Node\Software\Microsoft\Office\Outlook\AddIns  
Remove: CaesarForOutlook.AddinModule

# Remains from an old installation

Look for old installations using the following steps:

Start **PowerShell** as Admin and run:

```
Get-WmiObject -Class Win32_Product | Select-Object -Property  
IdentifyingNumber, Name | Sort-Object Name
```

Then run the following command to remove the old version:

```
msiexec.exe /x {your-product-code-guid}  
{your-product-code-guid} = IdentifyingNumber
```

**NOTE:** You need the installation file belonging to the old version to be able to uninstall it.

Once the old installation has been removed you can install the new version.

# Unable to find local Outlook installation

If during the CFO installation a message appears saying:

"The product requires Outlook 2010, Outlook 2013 or Outlook 2016."

That means that no local installation of these Outlook versions can be found on the machine.

The installation is looking for any of the following registry keys:

```
[HKEY_CLASSES_ROOT\Outlook.Application\CurVer]
```

```
@="Outlook.Application.16"
```

**or**

```
[HKEY_CLASSES_ROOT\Outlook.Application\CurVer]
```

```
@="Outlook.Application.15"
```

**or**

```
[HKEY_CLASSES_ROOT\Outlook.Application\CurVer]
```

```
@="Outlook.Application.14"
```

If Outlook is indeed installed on the machine and you still get the error message, please try running the msi-package using the following command line parameters:

```
msiexec /i CaesarForOutlook.en-us.msi /qb DETECT16="Outlook.Application.16"
```