



# CorpCast – Installation and User Guide

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## 1 Introduction

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CorpCast is an innovative add-on for Microsoft Office SharePoint Server 2007 and Microsoft SharePoint Server 2010 (SharePoint). The name CorpCast is derived from 'corporate broadcasting' and makes SharePoint more effective for your organisation by notifying staff of selected intranet updates, in real-time.

By extending SharePoint to include CorpCast, you can keep your staff up-to-date, in real-time, of any changes to any "watched" lists. CorpCast notifications will instantly pop-up from the Windows Taskbar notification area with a title and description.

CorpCast encourages staff to view and access information stored on SharePoint by navigating the user directly to the relevant area, by simply clicking on the notification message.

## 2 Technical requirements

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### 2.1 Server

The server side components of CorpCast require:

- Either Microsoft Windows 2003 Server or Microsoft Windows 2008 Server, with
- Either Microsoft Office SharePoint Server 2007, Microsoft Windows SharePoint Services v3 or Microsoft SharePoint Server 2010 Foundation or above (SharePoint)
- Installation of CorpCastServer service on a server accessible over a designated TCP port from all CorpCast clients.

### 2.2 Client

The client side components of CorpCast require:

- Either Microsoft Windows XP, Microsoft Vista or Microsoft Windows 7
- Microsoft .Net Framework v3.5 or above


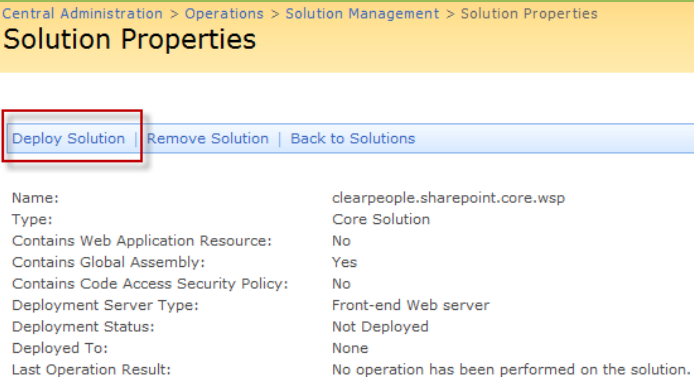
## 3 Prepare installation files

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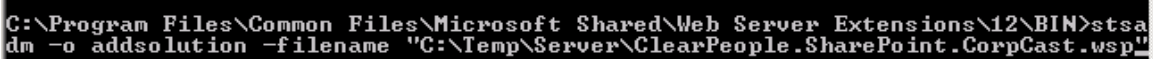
- Download latest version of the CorpCast software from: <http://www.clearpeople.com/SharePointDesktopTools>
- Extract the downloaded file to a temporary location.
- Copy the files in the "server" subfolder to a temporary folder on your SharePoint application server. Examples below assume that you have copied the folder to c:\temp\server.
- Copy the files in the "client" subfolder to a temporary folder on one or more desktop PCs. Examples below assume that you have copied the folder to c:\temp\client.

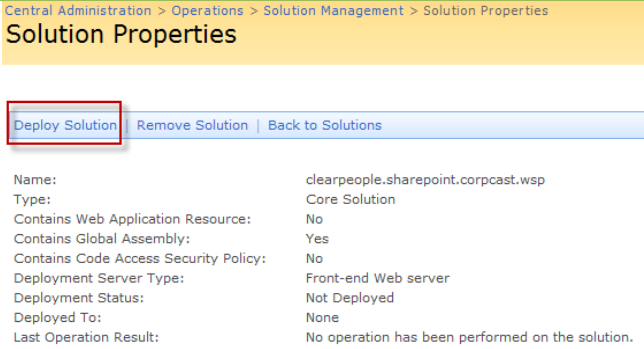
## 4 Server installation

### 4.1 Install “ClearPeople Essentials SharePoint feature”


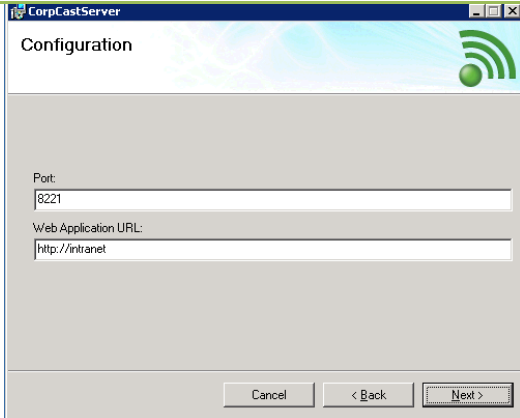
Step	Details
1	Open a command prompt and navigate to the SharePoint “12 hive” bin folder, typically located in: “c:\Program Files\Common Files\Microsoft Shared\web server extensions\12\bin”
2	Execute the following command to add the solution to SharePoint:  Stsadm -o addsolution -filename “[path]\ClearPeople.SharePoint.Core.wsp”  where [path] is the path to the server files, for instance:  <b>stsadm -o addsolution -filename “c:\temp\server\ClearPeople.SharePoint.Core.wsp”</b>  
3	Launch the SharePoint 3.0 Central Administration Console
4	Select the “Operations” tab and under Global Configuration select “Solution Management”
5	Within the “Solution Management” page select “ClearPeople.SharePoint.Core” and deploy the solution globally to SharePoint.  
6	Select a convenient time to deploy the solution.

### 4.2 Install “CorpCast SharePoint Feature”

Step	Details
1	Open a command prompt and navigate to the SharePoint “12 hive” bin folder, typically located in: “c:\Program Files\Common Files\Microsoft Shared\web server extensions\12\bin”
2	Then, please execute the following command to add the solution to SharePoint:  Stsadm -o addsolution -filename “[path]\ ClearPeople.SharePoint.CorpCast.wsp”  where [path] is the path to the server files, for instance:  <b>stsadm -o addsolution -filename “c:\temp\server\ClearPeople.SharePoint.CorpCast.wsp”</b>  
3	Launch the SharePoint 3.0 Central Administration Console
4	Select the “Operations” tab and under Global Configuration select “Solution Management”

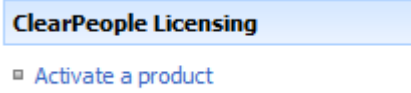
Step	Details
5	<p>Within the “Solution Management” page select “ClearPeople.SharePoint.CorpCast” and deploy the solution globally to SharePoint.</p> 
6	Select a convenient time to deploy the solution.

### 4.3 Install CorpCast Server

Step	Details
1	<p>Locate and execute the CorpCast Server installation file, CorpCastServerInstall.msi, for example</p> <p>C:\temp\server\CorpCastServerInstall.msi</p>
2	<p>Accept the License Agreement, and then please follow the on-screen instructions.</p> 
3	<p>When prompted, please enter the port on which the CorpCast TCP server will be listening and a valid URL to a SharePoint web application which will have CorpCast features activated.</p> <p><i>Make a note of the port used in this configuration as you will need it for the CorpCast SharePoint Feature Configuration, and for the CorpCast client configuration.</i></p> 

## 5 Activating license on server

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Step	Details
1	<p>On the SharePoint application server, open SharePoint Central Administration, and click on the Operations Tab. Then please click “Activate a product” in the ClearPeople Licensing group of actions.</p> 
2	

## 6 Configuring CorpCast notifications

### 6.1 Overview

CorpCast is activated on individual lists and is event driven. This means that the CorpCast feature will listen for certain events, which will trigger the notification of users via the CorpCast notification server service.

However, CorpCast allows you to specify which users will receive notifications on each list, and in addition which events will trigger such a notification.

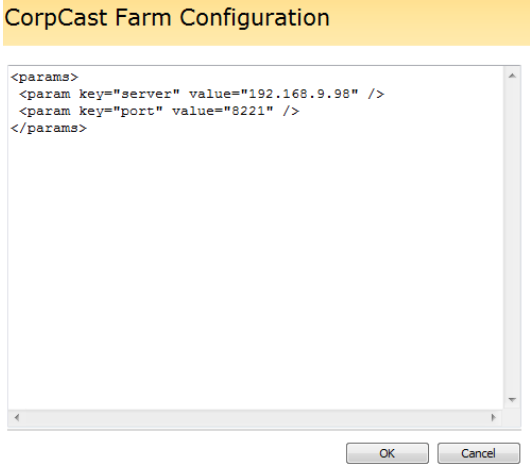
As an example, you may define the list "IT Service Desk Issues List" to notify the Active Directory (AD) group called "IT Support" when a new entry is added into the list (i.e. when someone raises a new issue in the list).

This is centrally managed from Central Administration's "Application Management" tab, or alternatively Site Owners may also activate CorpCast directly from a list's Actions menu.

Within Central Administration's "Application Management" tab the following actions are available:

- ClearPeople CorpCast Administration**
  - ClearPeople CorpCast Farm Configuration
  - ClearPeople CorpCast Lists Activation
  - ClearPeople CorpCast Security Profiles Configuration
  - ClearPeople CorpCast List Overview

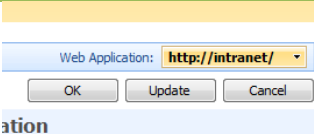
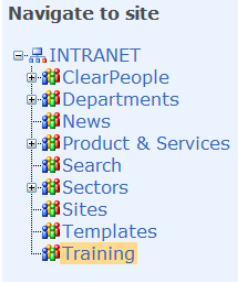

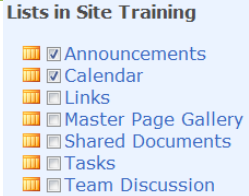
### 6.2 CorpCast Farm Configuration

Step	Details
1	<p>These settings inform CorpCast of the location of the CorpCastServer service installation, and the designated TCP port of CorpCast notifications.</p> <p>Please change the values for each parameter to correspond to the settings you chose in the earlier steps of this guide.</p> 

### 6.3 CorpCast Lists Activation

Activation of lists is managed on the following screen:



Step	Details
1	Select correct Web Application 
2	Using the left hand tree-view, navigate to the site containing a list that you want to activate. This example shows the site "Training" as being selected. 
3	On the right hand side, chose how you want to select lists. 
4	Finally, if choosing to "manually select lists in this site", please tick the check-boxes for each list you want to activate in the list of Lists below. 
5	Click "OK" or "Update" to save your changes.

**Please note**, that at this point CorpCast has been activated on the selected lists, but no notifications will be broadcast until Users or Profiles have been associated to those selected lists.

### 6.4 CorpCast Security Profiles Configuration

Profiles assist the administrator to easily maintain a collection of Active Directory (AD) Users and Groups for which events of one or more types will be triggered. These profiles can therefore easily be applied to multiple lists.

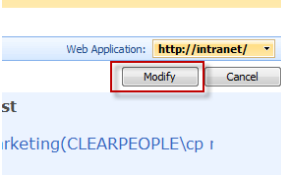
Note: You are not required to utilise the CorpCast Security Profiles. You can configure notifications directly to users or groups.

Step	Details	
1	<p>An overview of all existing Profiles is shown on the left hand side. Click on a Profile name to display its details.</p> <p>After selecting a Profile, click "Modify" to modify the details of the profile.</p>	
2	<p>To create a new Profile, click "Add", which display the Profile configuration screen.</p> <p>Title: Enter a descriptive title for the profile, such as "IT Support – Notify on Add" or similar.</p> <p>In the "People Picker" control, add users or groups that will receive the notification.</p> <p>In "Select alert trigger type" choose the events that will trigger a notification to be sent to the selected users.</p> <p>Click "OK" to save your changes and return to previous screen.</p>	

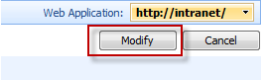
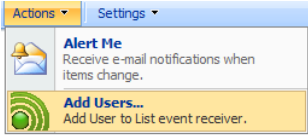
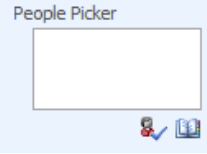
### 6.5 CorpCast List Overview

The CorpCast List Overview will show an overview of all sites and lists within a web application that have been activated with CorpCast notifications.

Step	Details	
1	<p>Expand the tree to navigate to a list with CorpCast activated.</p> <p><b>Note:</b> Please make sure you have selected the correct web application.</p> <p>Click on a list in the tree to select it, and to display associated trigger users and profiles, as well as the related trigger types.</p>	

Step	Details
2	<p data-bbox="272 230 735 282">To modify a list's notification settings select the list, and then click the "Modify" button.</p> <p data-bbox="272 309 651 360">Please see "Configuring CorpCast Notifications"</p> 


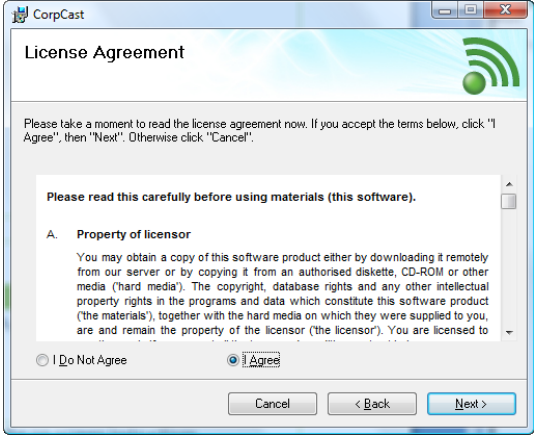
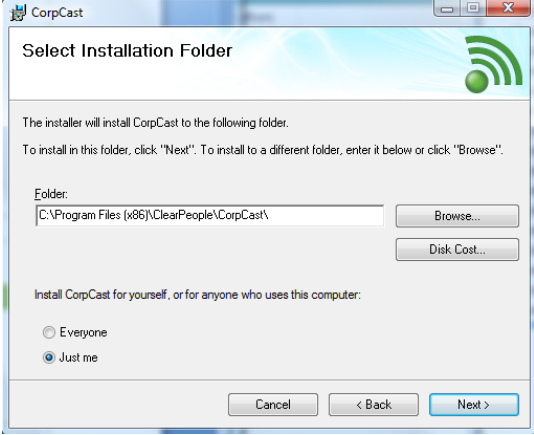
# 7 Configuring CorpCast Notifications

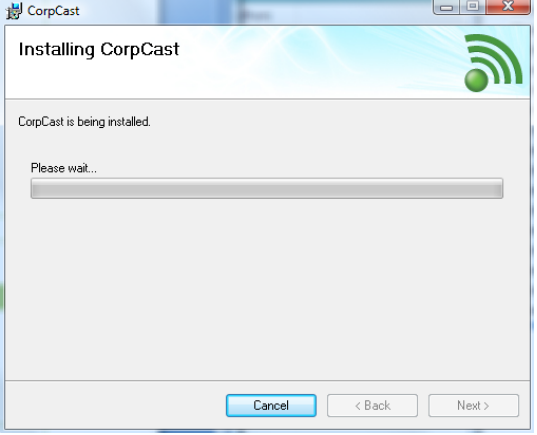

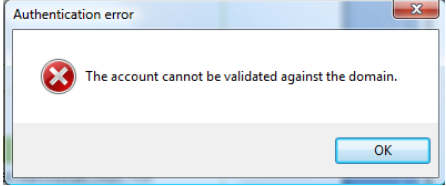
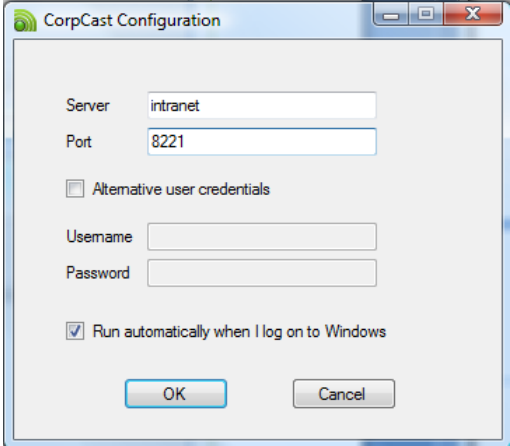

Step	Details
1	<p>From Central Administration, CorpCast List Overview, modify the selected list.</p> <p>Alternatively, from within the actual list's Action menu, choose "Notify users with CorpCast"</p>  
2	<p>Use the standard People Picker control to select specific users. You may enter multiple users.</p> <p><b>Send CorpCast alerts to:</b> You can enter user names or e-mail addresses. Separate them with semicolons.</p> 
3	<p>Select the events that should trigger a CorpCast notification for the selected users.</p> <p><b>Select alert trigger type</b> Specify the type of changes that you want trigger a CorpCast alert.</p> <p>Only send me alerts when:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Item Added</li> <li><input type="checkbox"/> Item Deleted</li> <li><input type="checkbox"/> Item Updated</li> </ul>
4	<p>In the list of users already added, you may untick the events, or the users that no longer should be included in the CorpCast notifications for this list.</p> <p><b>Users</b> Untick users that you do not want to receive CorpCast alerts.</p> <p>Users current being alerts via CorpCast</p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> CLEARPEOPLE\demo users</li> <li><input checked="" type="checkbox"/> ItemAdded</li> </ul>
5	<p>Alternatively to configure the users as per above, you may also select pre-configured CorpCast Profiles.</p> <p><b>Profiles</b> Untick profiles that you do not want to receive CorpCast alerts and tick the profiles that you want to receive CorpCast alerts.</p> <p>Profiles current being alerts via CorpCast</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> All CP - Item Add</li> <li><input type="checkbox"/> Development - Notify on Add</li> <li><input type="checkbox"/> IT Support - Item Add</li> <li><input type="checkbox"/> Marketing - Item Add</li> </ul>
6	<p style="text-align: center;"> <input type="button" value="OK"/> <input type="button" value="Update"/> <input type="button" value="Cancel"/> </p>

**Note:** Only users with Site Owner permissions will be permitted to configure global CorpCast notifications.

## 8 Client installation

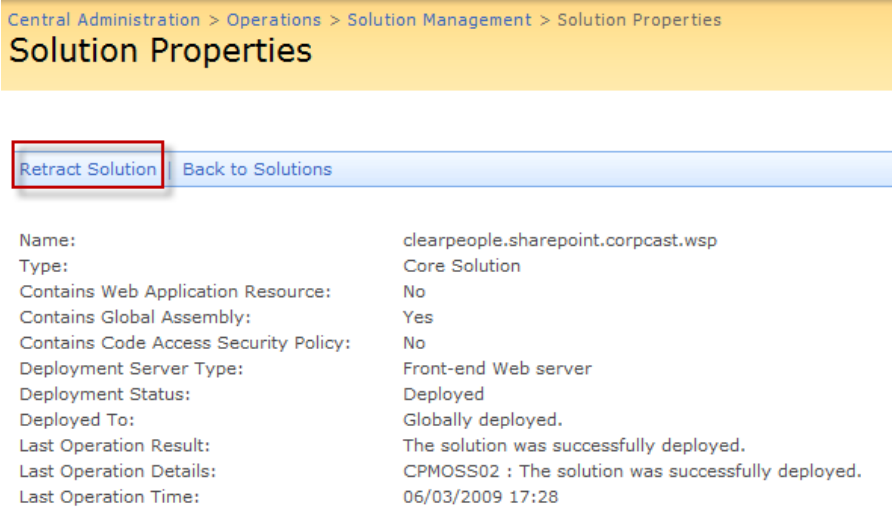
### 8.1 Install CorpCast client

Step	Details
1	<p>Locate and execute the CorpCast Client installation file, CorpCastInstall.msi, for example</p> <p>C:\temp\client\CorpCastServerInstall.msi</p>
2	<p>Click next to start the installation.</p> 
3	<p>Review the License Agreement, and select "I Agree" to agree to the terms of the License Agreement.</p> <p>Click <b>Next</b> to continue.</p> 
4	<p>Select the installation folder on your local machine. You may choose to install this application making it accessible for just yourself, or anyone using the machine.</p> <p>Finally click <b>Next</b> to proceed to the confirmation screen, and then click "Next" to start the installation.</p> 

Step	Details	
5	<p>The installation will display a progress bar. Please note that this can sometimes take a little while to start.</p>	
6	<p>After the installation the CorpCast client will be started automatically and the CorpCast icon will show in your desktop notification area either in Green for connected, or Yellow or Red when not connected.</p>  <p>You may see a warning as displayed here if the default settings are invalid.</p>	
7	<p>To configure the CorpCast client, please right-click on the CorpCast icon in the notification area, and select "Configuration..."</p> <p><b>Server:</b> This is a valid DNS name for the server on which the CorpCastServer service was installed.</p> <p><b>Port:</b> Please enter same port as was configured during the CorpCastServer service installation.</p> <p>Click OK to save the settings.</p>	
8	<p>Finally, if the CorpCast client doesn't connect automatically, please right-click the CorpCast icon and choose "<b>Connect</b>".</p>	 <ul style="list-style-type: none"> <li>- Not connected</li> <li>- Trying to connect</li> <li>- Connected</li> </ul>

## 9 Uninstalling

### 9.1 Uninstalling on server

Step	Details
1	Uninstall the ClearPeople CorpCast Server using standard Windows uninstall process.
2	<p>From Central Administration, Operations Tab, select Global Configuration, Solution Management action and retract the “clearpeople.sharepoint.corpcast.wsp” solution.</p>  <p>Central Administration &gt; Operations &gt; Solution Management &gt; Solution Properties</p> <p><b>Solution Properties</b></p> <p>Retract Solution    Back to Solutions</p> <p>Name: clearpeople.sharepoint.corpcast.wsp            Type: Core Solution            Contains Web Application Resource: No            Contains Global Assembly: Yes            Contains Code Access Security Policy: No            Deployment Server Type: Front-end Web server            Deployment Status: Deployed            Deployed To: Globally deployed.            Last Operation Result: The solution was successfully deployed.            Last Operation Details: CPMOSS02 : The solution was successfully deployed.            Last Operation Time: 06/03/2009 17:28</p>
3	From Central Administration, Operations Tab, select Global Configuration, Solution Management action and retract the “clearpeople.sharepoint.corpcast.wsp” solution.

### 9.2 Uninstalling on client

The CorpCast client is uninstalled using the standard Windows uninstall procedure.

# 10 Troubleshooting

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Problem	Possible Resolution(s)
CorpCast icon remains yellow or red in the notification area.	<ul style="list-style-type: none"><li>• Right-click and manually attempt to connect.</li><li>• Verify that you are connected and logged in to the domain or that the alternative user login credentials are correct.</li><li>• Verify that the server and port settings are correct, and that the selected port is not blocked or used by other applications.</li></ul>
You receive an “authentication error” when attempting to connect.	
You receive a “license validation error”.	
Notifications show “TRIAL LICENSE” text in the description area.	