

Frequently Asked Questions

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Introduction

The document contains the set of frequently asked questions about creating Kayxo Insight Applications. The main purpose of the document is to provide the answers and solutions to common problems encountered while configuring Kayxo Insight. This FAQ should be used as a knowledge base.

This document is an annex to "Kayxo Insight - Application Programmer's Tutorial" manual. Before using this manual, the reader should be familiar with the overview of the Kayxo Insight. It is recommended that the reader understands the basics of Microsoft Outlook custom forms development and Mail Application Programming Interfaces (MAPI) properties.

General

Is Kayxo Insight the right product for me?

The Kayxo Insight is designed as a departmental or small-to-medium company product. If you have up to 1000* Microsoft Outlook users who need to cross-reference information from various back-end databases (Microsoft SQL Server, Oracle, etc.) and local storages (Microsoft Office Excel or Access) this product will be extremely helpful to increase the productivity of information workers.

* The number of concurrent users that can use Kayxo Insight application without performance problems depends on hardware, network, databases involved and on Data Source component(s) used.

What is Kayxo Insight Client Application?

Kayxo Insight comes as an SDK and it needs to be configured in order to use it. The configuration and custom data source components, custom inspectors, custom controls (when needed) together with the database or other source of data make Kayxo Insight work. All these elements are called Kayxo Insight Application.

What is the Kayxo Insight configuration?

Kayxo Insight configuration defines all the necessary parameters for the Kayxo Insight to work, i.e. open Kayxo Insight Message Store in Microsoft Outlook, show folders within this store, show data in Microsoft Outlook Explorer views, allow inspecting objects, add user controls to Microsoft Outlook views, etc. The configuration is created inside Microsoft Outlook. Redistribution of the configuration for workstations is performed by exporting it to a PST file and then importing it to Microsoft Outlook using the Kayxo Insight Configuration Import/Export Tool.

How difficult is it to configure Kayxo Insight?

Any junior IT professional with understanding of database structures and query languages can easily configure Kayxo Insight. Being familiar with Kayxo Insight is required. The basic knowledge of Microsoft Outlook custom forms development, and MAPI properties is recommended.

How much time does it take to implement a basic configuration to retrieve data from a SQL Server?

It is only a matter of an hour or two to understand the configuration basics and to create/debug a configuration.

Do I have to learn MAPI to configure the Kayxo Insight Message Store Provider?

You do not need to understand MAPI to configure folders or data sources. The only exception is mapping fields to MAPI properties. In such cases, basic knowledge of MAPI properties is required. All the necessary information is provided in the product documentation and examples.

Why do I need to be familiar with database structure and class model before configuring the system?

Configuring data presentation for Kayxo Insight Message Store in Microsoft Outlook requires configuring data sourcing. That cannot be done without being familiar with the database structure and class model to be used.

How do I plan and start creating Kayxo Insight Configuration?

You should start with opening the Kayxo Message Store in Microsoft Outlook. Continue by configuring folders and data sources for folders in steps. Do not configure the whole folder structure at once - do it step by step. Finally you create/configure inspectors.

See: "[Kayxo Insight - Application Programmer's Tutorial](#)" for details.

Does Kayxo Insight work with mail clients other than Microsoft Outlook?

No, the Kayxo Message Store Provider was designed for Microsoft Outlook. It cannot be used with Outlook Express or any other mail client.

Does the Kayxo Insight support off-line working?

Kayxo Message Store Provider requires particular implementations of the data and folder providers to support off-line working. These implementations are not part of the standard product.

What are the software requirements to install the Kayxo Insight?

Windows XP (English or German) SP3 or Windows Vista 32 or 64 bits (English or German) SP2,
Microsoft .NET Framework 2.0,
Microsoft Outlook 2003 with SP3 or Microsoft Outlook 2007 with SP2 with its license activated.

How can I map Attachments and Recipients in Kayxo Insight?

Attachments and Recipients are message sub-objects because they are created, maintained, and accessed only through their messages.

Two datasources are needed to present attachments: one to show the list of attachments for a message and the other one to open/update/delete/insert a specific attachment.

Only one List Datasource must be configured for Recipients.

Can I source attachments and recipient information from a different data source?

Yes, you can source attachment and/or recipient tables from the same or different data source than the one used for the messages.

How can I do to get information from an Excel file?

To get information from an Excel file, you need to select the OleDb connection type in Connection Settings and configure the Connection String. For it, if you have Outlook 2007 please visit: www.connectionstrings.com/excel-2007 and for Outlook 2003: www.connectionstrings.com/excel

Can I search in multiple folders using Kayxo Insight?

Yes, you can search for information through the folders just like Microsoft Outlook/Exchange does. You have to create a search data source which implements IFindDataSource interface, indicating that the data source acts as an asynchronous finder for cross-folder advanced searches.

How can I source Free/Busy data?

In order to source free/busy data from many sources at once, you need to develop and configure custom free/busy providers. Please refer to [Kayxo Insight documentation for details](#).

Can I create my own installer to deploy a custom Kayxo Insight application?

Yes, Kayxo Insight Run-Time edition allows the OEM partners create custom applications and deploy them using their own custom installers.

Does Kayxo Insight manage exceptions to show errors in a data source?

Yes, Kayxo Insight provides a Write Exceptions hierarchy that any data source can use to show detailed information about errors.

See: "[Kayxo Insight - Application Programmer's Tutorial](#)" for details.

Can I add my own actions in the context menu?

Yes, you can define Context Menu Actions that will be added as new options to Microsoft Outlook item context menu. You can also use icons to identify your own actions.

I have installed and configured Kayxo Insight and now I can see that a new Kayxo Insight version was published. What happen with my configurations, information, etc. if I install the new version?

Kayxo Insight support auto-update. It allows users to maintain old configurations and previous solutions and install the new features that are included in the latest Kayxo Insight version published.

How many Context Menu Actions does a folder support?

There is no limit for number of Context Menu actions. You can define as many actions as you want.

Do you provide any evaluation time to try this product?

Yes we do. An evaluation license for 45 days is included with the installation package.

What should I do if I want to buy this product?

You can contact our team by sending us an email to: sales@kayxo.com or call:

Sales America phone: +54-11-5171-5500

Sales Europe phone: +45-4693-1515

Kayxo Insight Store

What is Kayxo Insight Store?

From a user's perspective the Kayxo Insight Store is yet another message store available for him/her in Microsoft Outlook (as his Mailbox or Public Folders stores). The Kayxo Insight Store hosts the hierarchical set of folders, and these folders are containers for messages. The difference is that information (folder structure and folder contents) is not sourced from an Exchange Server, but from other sources ranging from locally stored Excel-files to centrally managed accounting systems. Budgets, sales statistics, customer data, and much more may be presented in the familiar Microsoft Outlook user interface providing users with a quick insight into business matters.

All this is done by Kayxo Insight Message Store Provider.

What is Kayxo Insight Message Store Provider?

Kayxo Insight Message Store Provider is a MAPI service provider that presents the services of some underlying storage mechanism to MAPI client applications (Microsoft Outlook) as a hierarchical set of folders and messages that MAPI clients can use.

The Kayxo Insight Message Store Provider is a highly-configurable and extendible adapter between legacy Mail Application Programming Interfaces (MAPI) and modern .NET based interfaces. With this component, application programmers no longer have to implement cumbersome MAPI interfaces in unmanaged COM code. Instead, they build components implementing simple interfaces in managed .NET code. Pre-built configurable components allow rapid development and consistent behavior.

With Kayxo Insight Message Store Provider, showing business information inside of Microsoft Outlook is basically a matter of sourcing and providing folder structures and data sets.

Is the Kayxo Insight Message Store Provider implementation based on a Microsoft Outlook feature or is it a "hack" for Microsoft Outlook?

Kayxo Insight Message Store Provider is not a hack. Microsoft Outlook provides the message and address book store provider interfaces. MAPI SDK (published on MSDN website) contains the necessary information to extend Microsoft Outlook with new store providers. Since MAPI is a native

API that uses Component Object Model (COM) to define its components and interfaces, the store provider can only be created using low level languages such as C and C++.

Does the Kayxo Insight Message Store Provider replicate external data inside Microsoft Outlook as a local .pst file?

No, the Kayxo Message Store Provider does not replicate information. The data displayed inside folders and the folders are obtained on-line, querying the back-end systems.

Can I have more than one Kayxo Store?

Yes. You can open more than one Kayxo Insight Message Store if needed.

Folders in Kayxo Insight Store

Are folders data containers?

Not really. Folders within Kayxo Insight Store are not containers for messages but filters that filter data for Microsoft Outlook Explorer views. They are more like Microsoft Outlook search folders. When a folder is selected, the data for Microsoft Outlook Explorer view is provided according to folder definition in configuration.

How do I build the folder tree structure?

The folder structure is defined in configuration and can represent any hierarchy. Typical folder tree structure will present the identities hierarchy (recommended). Application programmers should define folder tree structure having in mind user requirements and available data sources.

See: "[Kayxo Insight - Application Programmer's Tutorial](#)" for details.

What is the difference between static and dynamic folders?

The configuration of static folders defines the Kayxo Insight Store hierarchical folder structure. This configuration will always generate the same "static" folder structure.

The configuration of dynamic folders allows the dynamical generation of folders from a data source. A different folder structure may be generated depending on data changes.

See: "[Kayxo Insight - Application Programmer's Tutorial](#)" for details.

Data for folders in Kayxo Insight Store

What is a data source?

Data Sources are modules responsible for supplying the contents of folders to the Kayxo Insight Message Store Provider and items' data for Inspectors (Microsoft Outlook forms). They can also provide folders' data for dynamic folders.

What are Microsoft Outlook Explorer Views?

Microsoft Outlook Explorer View is the right panel of Microsoft Outlook window, in which the messages are displayed.

Can I create new data sources using VB.Net?

You can create data sources for the Kayxo Insight Message Store Provider in any .Net language.

Can I create new data sources using VB 6?

No, you have to use a .Net based language/compiler to create new data sources for the Kayxo Insight Message Store Provider.

Can I create new items in a folder displayed using the Kayxo Insight Message Store Provider?

If the configuration of a folder specifies the Data Source capable of creating items, then items can be created.

Data Sources that implement *IDataSourceWrite* interface are capable of creating, updating and deleting items (if they implement Create, Insert, Update, and Delete methods).

Refer to [Kayxo Insight documentation for details](#).

Can I change the folder structure from Outlook and reflect the changes in my system using Kayxo Insight?”

Yes, writing capabilities for folders that are dynamically sourced based on LOB data is part of the product. This gives the Data Sources the ability to manage folder’s events like when a folder is created, deleted or renamed by the user in a dynamic folder structure and reflect that change in the LOB

Inspecting

How can I view the information contained in an item inside a folder supported by Kayxo Insight Message Store Provider (or, what happens when I double-click an item)?

Each time you double click an item, Microsoft Outlook searches for a particular entry field that indicates the form to be used to display the item. By creating custom forms or custom .Net inspectors and configuring folder and data sources, you can inspect Kayxo Insight Message Store Provider based items as any other common Microsoft Outlook items.

How do I define inspectors?

You define the inspector by specifying the MessageClass field. The MessageClass value determines the inspector that will be used by Microsoft Outlook to open an item. If you use custom forms, then they must be published in such a way that the MessageClass matches the published form class.

See: "[Kayxo Insight - Application Programmer's Tutorial](#)" for details.

How is the inspector to be used selected by Microsoft Outlook?

When users want to open an item, Kayxo Insight intercepts the Microsoft Outlook open item event and provides item data for Microsoft Outlook to search for the correct inspector. Microsoft Outlook locates the inspector (the best match for the MessageClass of the item) and uses it to open the item. Configuration defines record classes for each type of item (MessageClass field).

See: "[Kayxo Insight - Application Programmer's Tutorial](#)" for details.

How are data sources defined for inspectors?

Inspectors use the data source that is defined for the folder. When creating a folder configuration you must map fields to MAPI properties. Then Microsoft Outlook will use the field values to set the values for properties in an item. Alternatively, for user defined properties, mapping is done by specifying the same name for column "name" attribute in configuration and the property name in the Microsoft Outlook form.

You can reuse the view configuration ("List DataSource") for inspecting items. You can also have items configured differently than for the Microsoft Outlook view ("DataSource" and/or "Fields Mapping"). All scenarios are allowed.

See: "[Application Programmer's Tutorial](#)" for details.

How do I distribute Kayxo Insight configuration?

Once you have configured Kayxo Insight on one workstation, you can export the configuration, and then, import it to other workstations using Kayxo Insight Configuration Import/Export Tool.

See: "[Application Programmer's Tutorial](#)" for details.

I exported my pst using the import/export tool, but I cannot see it in my computer, what should I do?

If you are using Windows Vista or Windows 7 there are 3 options to make it. A) Turn off the User Account Control (UAC) and export it again. B) Run the import/export GUI tool as administrator. C) Export the pst on a folder with permissions (e.g.: my documents)

Troubleshooting

I cannot filter items in Microsoft Outlook view

Fields mapped to standard Microsoft Outlook MAPI properties are used for filtering. Fields mapped to named properties are not included in filtering.

Use "Advance Find" (or a search folder) where you can specify named properties and use them for filtering (one by one). The result view is the standard view.

This problem is data source dependant and does not apply to all data sources.

No Microsoft Outlook response when selecting a folder

When a large number of items are being refreshed, the refresh process takes control and no user action is processed (Microsoft Outlook does not respond, but the cursor does not change to hourglass).

This happens when the folder is selected for the first time or when a large number of items have been deleted/changed/added. This behavior is data source dependant. Performance may improve when other data sources (custom) are used.

How can I add the fields that I have previously removed from the Microsoft Outlook view?

Fields removed from the Microsoft Outlook view are listed in the Field Chooser. They are mapped to standard MAPI properties and appear under their MAPI names (for instance, Subject instead of Company Name). When added to the view they will be displayed under their MAPI names.

Kayxo Insight Documentation

Here is the full list of Kayxo Insight manuals available inside Kayxo Insight SDK. All those manuals contain detailed information about Kayxo Insight.

General Documentation

“[KI_GettingStartedGuide](#)”: This manual is an introductory document for Kayxo Insight users.

“[KI_FAQ](#)”: This manual. It contains the set of frequently asked questions about using Kayxo Insight and creating Kayxo Insight Applications.

User Related Documentation

“[KI_UsersGuide](#)”: This manual is intended for all users of Kayxo Insight regardless the Kayxo Insight Application currently running. It contains basic information that applies to all types of Kayxo Insight Applications.

“[KI_Installation Guide](#)”: This manual describes Kayxo Insight installation process.

Application Developer’s Related Documentation

“[KI_ApplicationProgrammersTutorial](#)”: This manual is the primary manual for Kayxo Insight application developers.

“[KI_Programmer’sReference](#)”: This help file (CHM) presents Kayxo Insight Framework class library, interfaces, and value types. This library provides access to system functionality and is designed to be the foundation on which Kayxo Insight applications, components, and controls are built.

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