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1 Introduction

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<http://www.diditbetter.com/>



Version 4.x series

Manual updates as of 9/27/2012

- **User Guide** A guide written from the perspective of the end-user of Add2Outlook. An excellent beginner's guide for end-user and administrator alike. Start here.
- **Installation Guide** A straightforward guide to installing Add2Outlook. Does not cover background material necessary to plan your configuration once the software is installed, so be sure to read the administration guide prior to this guide.
- **Administration Guide** A guide for the administrator of Add2Outlook. Covers concepts in-depth, deployment planning and implementation as well as routine administration.
- **Troubleshooting Resources** Resources from DidItBetter.com to assist with any issues you encounter.

**Print Version**

A PDF version of the most current revision of this manual is available at <http://support.diditbetter.com/guides.aspx>.

**Important**

Please read the Release Notes included with the version of Add2Outlook you are installing regardless of whether you are new to Add2Outlook or an experienced user.

The Release Notes summarize important updates on the installation process, any changes to capabilities, including enhancements and retractions, user changes in behavior, configuration changes, system requirements and procedures. This information is significant and will ensure proper operation.

**Tip**

Save time! Want to skip reading this manual? We are now offering Remote Installation and Configuration Services for this software. Visit <http://store.diditbetter.com/> for pricing and to purchase your Remote Installation Service today!

1.1 Rights Information

Microsoft®, Windows®, Windows XP®, Windows Server®, Exchange®, Exchange Server®, Outlook®, Outlook Web Access®, SQL Server®, SQL Server Express®, Microsoft Update®, PowerShell® and Remote Desktop Connection® are the registered property of their respective owners.

DidItBetter Software®, Add2Outlook®, Add2Exchange®, Add2Outlook®, DidIT® with Microsoft Office, FolderMatic® for Microsoft Exchange, TaskController® are the registered property of DidItBetter Software.

The End User License Agreement (EULA) for this product is available from within the program.

1.2 Support Note

Let's start by building a good relationship between you and our support team. It is a good idea to read this

document in its entirety because, as with any powerful tool, it is best to be familiar with ALL of the practical aspects of the Add2Outlook operation before using it on your mission-critical data. As good advice please back up your data FIRST, before installation and operation.

Note: If you used Add2Exchange prior to this installation, you may need the Add2Outlook Toolbox to sanitize your data again before conversion.

Please install the solution after reading this manual, as there are some prerequisites you have to complete to have a successful trial. As good advice, please back up your data FIRST, before installation and operation. Even where you install it is in question depending on the kind and number of relationships you are trying to set up.

This document also identifies which one of the several solutions we offer, so you can best pick your situation, and test the solution which best fits your needs. Many people use Add2Outlook as a test for Add2Exchange and it works to demonstrate it, but often it is best to just test the right product. Add2Outlook was designed to replicate between the installed user's own mailbox, between the mailbox and PST files, and especially for HOSTED Exchange. All other uses are best served by Add2Exchange Enterprise or Add2Exchange Standard.

If you have a problem, we have a complete section of Technical Bulletins and Frequently Asked Questions on the web at: <http://support.diditbetter.com/knowledgebase.aspx>.

Our Technical Bulletins section can help you find almost every issue the support team has encountered, complete with recommendations and resolutions, 24 hours a day. Please use these resources.

Also, if you run into any trouble, view <http://support.diditbetter.com/add2outlook-forums.aspx>. If your answer is not there, then submit a support request at <http://support.diditbetter.com/support-request.aspx> BEFORE you delete alerted relationships or folders or erase all the contents. If you do this and the program replicates, depending on the relationship you have specified, the program may “correctly” remove the source items as well.

Note: Support and all tools are included if you purchased a Value Bundle. Please check to see what kind of support you have and allow us to help you before you attempt anything, as it is often easier for us to fix things before any other fix is attempted.

This manual and software is the product of thousands of man hours of programming, testing, requests and feedback from people like YOU. Please share your suggestions on making our products serve you best and email them to ai@diditbetter.com.

Thanks for helping us build a great support relationship.

The DidItBetter Software Team

Your Rights as a Licensee

1. You have the right to a better user experience by reading this manual. Informed customers make their own experience better.
2. Licensed users have the right to FREE **email support** and software package updates and upgrades for

the duration of your software assurance period.. We also offer free self help resources on our support website: <http://support.diditbetter.com>.

FAQs	http://support.diditbetter.com/faq.aspx
Technical Bulletins and Supporting Files	http://support.diditbetter.com/technical-bulletins.aspx
Documentation	http://support.diditbetter.com/guides.aspx
Support Requests	http://support.diditbetter.com/support-request.aspx
Support Forums	http://support.diditbetter.com/forums.aspx

3. You have the right to phone or remote support with a premier support package in place or on a per session basis for a reasonable fee. Support sessions are scheduled by appointment during our normal business hours Monday through Friday from 9 a.m. to 5 p.m. EST.
4. You have the right to escalate your case to Priority Support for an additional fee. Priority Support cases are handled ahead of other cases and, at the discretion of DidItBetter Software, may be handled outside of regular business hours.
5. You have the right to have your configuration certified, the package installed, upgraded and/or configured for you for a reasonable fee by one of our certified technicians.
6. You have the right to have your ideas and suggestions be heard, acknowledged and considered for future upgrades.
7. You have the right to have your feature request escalated to a formally quoted development request.

For any of the above support options, call 800-837-8636 or International: 001-813-977-5739, or visit: <http://support.diditbetter.com/premium-support.aspx> and select one of the support options under *Categories*.

Thank you for the opportunity to be of service. We look forward to working with you.

1.3 Is Add2Outlook Right For You?

Before going any further into the background of Add2Outlook, there may be a few things to consider before committing to the product.

Add2Outlook was originally developed for Outlook 2000. The original version (2.6x) no longer conforms to the Microsoft Security Model. The new release (4x) has been updated for Outlook 2003, 2007 and 2010 and the current release supports Exchange 2003, 2007 and 2010.

The only two reasons to use Add2Outlook are if the user has a Hosted Exchange Server or is replicating to a PST file.

Add2Outlook is a 2-way Outlook calendar, contact & task synchronizer for desktops. If you host your own Exchange, or are moving to Hosted Exchange, or want to replicate between a local PST to PST or PST to Exchange, use Add2Outlook.

Which solution is right for you Add2Outlook or Add2Exchange?

The following are key points to consider when determining whether to try Add2Outlook. Add2Outlook requires some changes to the default operation of Outlook which are listed below:

- On comparing our products in the order of good, better, best; Add2Outlook is good, and is the only product which will work in Exchange Hosted mode. Add2Exchange Standard is a better solution if you host your Exchange Server “in house” and Add2Exchange Enterprise is absolutely the best in that scenario with the least TCO. Add2Outlook and Add2Exchange Standard make relationships individually, picking the source and the destination folders and specifying the rules of the relationship. Add2Exchange Enterprise makes template relationships (to the service account) and you attach an email enabled distribution list to a template relationship to make and remove relationships. Add2Exchange Enterprise is faster, more aggressively enhanced and is more widely supported as the leader in centralized relationship management solutions today.
- Add2Outlook cannot sync automatically when Outlook is in Cached Mode. This is a significant drawback that disables your onboard Outlook spam filter mechanism. Add2Exchange, the server based product does not require any change on the Outlook workstation.
- Add2Outlook no longer requires a third party piece of software to be installed to circumvent the normal Outlook built in security model in Outlook 2007.
- With Add2Outlook, the Exchange account no longer has to be the default account for internet email. Add2Outlook does not work with Outlook Web Access and Add2Exchange does.
- With Add2Outlook, the Outlook profile must be open and connected on the workstation for replication/synchronization to occur. Add2Exchange operates as a Windows service on the Exchange Server or a File Server (or dedicated workstation running Exchange System Manager). For synchronizing folders when out of the office, Add2Exchange replicates/synchronizes folders, and continues to do so, with or without Outlook open.
- With Add2Outlook, the replication process occurs on the workstation and adds “traffic” to your network switch and may result in slightly slower replication and response times. Add2Exchange does not cause lags in Outlook.
- Add2Exchange offers unlimited folder relationships while Add2Outlook supports 200 folder relationships.
- Add2Exchange requires one install on the Exchange server (or file server) regardless of the number of relationships. Add2Outlook requires install and licensing on each user’s workstation with Outlook open at all times to replicate items. For multiple users, many set up a dedicated sync account and workstation with Outlook installed and all the relationships replicating from one place, this way no users are involved. This Add2Outlook centralized sync configuration is easier to manage and back up, and since Outlook must be open at all times for Add2Outlook to replicate on a timed basis, this removes any user interference. A service account with proper access permissions is also often created to maintain a tight security model since no elevation of privileges is required for any existing user.
- Add2Exchange offers centralized folder relationship management while Add2Outlook is decentralized. If the workstation(s) crash or gets stolen, without a copy of the workstation’s

registry, the relationship information can be lost and it may cause duplicates if the relationship is recreated later. A backup of the registry on the installed computer is helpful, but not required. A Special tool can assist in this Recovery and Migration Manager mode for an additional \$99.

- Add2Exchange offers the option for public-to-public and private-to-private folder replication while Add2Outlook does not.
- Add2Outlook works with PST and Offline Folders while Add2Exchange does not.
- Add2Outlook works with Hosted Exchange Servers. Add2Exchange can as well, if the hosting provider will cooperate.
- Both Add2Exchange and Add2Outlook work with all Outlook-based mobile devices.

Please do take these key points into consideration before going any further.

2 Add2Outlook User Guide

A guide written from the perspective of the end-user of Add2Outlook. An excellent beginner's guide for end-user and administrator alike. Start here.

2.1 System Overview



Tip

If there are more than 2 users in your organization desiring the functionality of this Workstation Com Add-in product, we recommend creating a dedicated Synchronization box and a replication service account so the replication system can operate without a user's interference. This also maintains a higher level of security since the user does not need to have access to all the folders. Again, if this is not a hosted exchange installation or synchronizing to PST files, consider the server-based product for an easier and more manageable installation with more capabilities, faster and better utilization of resources, and of course, fewer points of failure (Windows, Outlook and your Users).

Add2Outlook was designed as a 1 or 2-way folder item replication utility. Specifically, all relationships are typically one way, with items made in the source being synced to the destination folder. The information synced can be unidirectional, or one way, with information flowing only one way, no matter what is done on the destination side or it can be bidirectional.

Originally, Add2Outlook was designed to create the relationships using Outlook profiles to copy from the public to the private so smartphone and mobile device synchronization software can bring it back and forth to the users of smartphone and mobile devices using Outlook connected to an Exchange Server. Most users who use iPhones, iPAQs, Blackberrys, Androids, want to see their personal items and a copy of their group Exchange items on their devices, but Exchange and the current synchronization software does not support this. Add2Outlook does this and has been enhanced to allow for the reverse relationship, (with anything made on the private and not marked "private" option) it will copy up to the public folder to act as an automatic reporting feature for managers and team members. This enhancement combined with the cardinal rule of synchronization not to copy a copy, gave the teams who use the program instant information to where everyone was at any given time, or contacts or tasks. All the users need to do is use Outlook normally. The program can even untie copies that the user made notes into so the information is saved for the user. During the next synchronization, these "changed destination items" are untied and a new copy of the source item gets replicated so the user doesn't lose any notes.

Other enhancements in the latest builds include not requiring Exchange Serve for PST sync. Add2Outlook can be in Outlook Exchange Cached mode now. The relationships now allow for full item "conflict and copied resolution" with the powerful option to write changed destination items back to the source (Bidirectional Sync). This means the changed destination copy (of the original item) then becomes "the master" and those changes get synced to the source and then to all other relationship copies. Changes back to the original item can include edits and or deletions.

Note: These features are powerful and should be used with thought, because the ideal rule of synchronization is if many people change the same item during the same sync cycle, one changed item becomes the master copy and is then replicated out to the destinations. Once users can change their copy and replicate it back to the source, for that moment there are (at least) two master copies and the rules of conflict resolution are invoked. If more than one person has this power unnecessarily, someone's changes will be lost – the user who replicated first. If a user does not need the power, there is little reason

to give it to them and avoid an unnecessary conflict.

Common Uses

- Use Add2Outlook when in Hosted Exchange mode, replicating to PST files or in an installation where only one user is using replication.
- Use Add2Outlook if you want to replicate between one or two folders of the type of calendar, contact, task or notes where the new items get copied to another based on the information relationship you set up between the folders.
- If you want to have your public folder items synchronized to your personal folder so it is then wirelessly replicated to your smartphone or mobile device.
- Use Add2Outlook if you want to sync private-to-private folders for calendars, contacts, tasks and notes.
- If you are syncing your exchange mailbox folders to a personal PST file.

Note: Add2Outlook is programmed in “the latest from Microsoft”, the .Net (pronounced “Dot Net”) Framework and is an Outlook Add-on loaded on the workstation running Outlook 2000, 2003, 2007 and 2010 and once installed and a relationship is set up, it will run on an unattended timed basis (or manually) as long as Outlook is open and is online. Depending on the relationship, all items from the Source folder are copied to the Destination folder on the manual/timed basis, and Add2Outlook will not copy a copy it has made, only originals.

The Source Folder can be a group folder to a private folder, or can be used on any combination of 2 folders in Outlook, either public or private, or server-side mailbox to personal Outlook™ file (PST) or Offline folder (OST).

Important! If you make a relationship from folder one to folder two, then a relationship from folder two to folder three, only the items made directly in folder two will be copied to folder three, not the copies from folder one. Add2Outlook and Add2Exchange (both versions) will not copy a copy, so if you want all the items from folder one to go to folder three, you must make that relationship as well.

A simple setup program will install Add2Outlook on each machine. If you are replicating to more than one user, using a standalone machine and replication service account is the most ideal setup. This way, since Outlook has to be open on the replication machine, a user working on the non dedicated replication server is not in the way, with their actions affecting normal synchronization. Also, by using a service account on a separate machine, there is no need to elevate the security privileges of a normal user. If Add2Outlook is to be installed for one user, Add2Outlook creates a separate thread and has little impact on the machine itself.

Add2Outlook installation prompts to create a profile as an Add-in to Outlook during Outlook startup. Once installed, Add2Outlook puts new buttons on Outlook’s upper or lower toolbar depending on the version of Outlook. It also makes an option for the Add2Outlook Console when you right click and go to properties of the folders. There are separate installations for each version of Outlook (2003, 2007 and 2010) each with a slightly different interface. Each version of Add2Outlook has the same options of replication. These buttons include the Start Sync button for immediate syncing which toggles between starting the Sync and stopping the current Sync, and a start timer button for the timed replication schedule.

During initial set up of Add2Outlook, and before synchronization can occur, the user must make at least one “information relationship” and specify the “Rules of the Relationship” to go into trial mode. The trial countdown of each type of folder starts when you create the first relationship of that folder type. The rules include a source folder and a destination folder and the options desired for

conflict resolutions, deletions, copied resolution, and auto population of the subject. If appropriate, as in for calendars and tasks, there is a definable date range for calendar appointments in the future and the past, and for task start and end dates. For calendars and tasks, Add2Outlook has been designed to include a user selectable date range in the past as well as in the future. This is called the “replication timeframe”. How often it replicates is the “replication interval” and the system defaults to automatic synchronization on an interval of 5 minutes between syncs. This means it will start syncing, take as long as it needs to, finish, wait 5 minutes and then start to sync again in automatic mode. In the relationships, the user selects the timeframes for which Add2Outlook should replicate items, or for all items in the case of contacts. Unless set to a static timeframe when Outlook is open and in the appropriate profile, Add2Outlook automatically waits, replicates and waits until the next interval. The next time, the replication interval increments and waits for the next scheduled replication period.

Synchronization happens at the beginning of each replication interval. The replication interval can be set on a reoccurring interval, a specific time or can be triggered manually. When synchronization occurs, the program goes through a synchronization process. The options picked by the user to create the relationship are “rules”. The rules are read by the program during synchronization to determine what information gets synchronized between the two folders. When the next replication process triggers, the initial items are synchronized and all of the items in the source folder are copied into the selected destination folder. During the next synchronization process, the program copies any changes made to either the source folder item or the destination folder item based on the rules of the relationship.

You must open the Add2Outlook console to configure the relationships with the rules desired. You must CLOSE the console for replication to occur and have the system start the interval timer to sync, or by manually pressing the Sync Now button. If synchronization is occurring, when opening the Add2Outlook console, synchronization stops. You must close the console and still be in Outlook for that profile for synchronization to occur.

Old Diditbetter.com program upgrades: If crossgrading from CalendWare or Public2PrivateWare, during initial installation, Add2Outlook will remove the items copied by Public2PrivateWare and will deactivate Public2PrivateWare. We had to do this because having both programs run at the same time will cause duplicates and that is completely unacceptable. If using other synchronization programs, including Add2Exchange, you should remove the copies they made by removing the relationships prior to syncing with Add2Outlook because they will be there and treated as originals and potentially cause duplication. Instead, set up both relationships within Add2Outlook.

If you were using Add2Exchange prior and the Add2Exchange Replication Server is unavailable, you can remove the copies manually or the best option is to use the **Add2Outlook Toolkit** utility to help clean up from the old replication. It is always best practice to clean up any duplication prior to installing replication software. Contact Tech Support for more details on this special case scenario, or visit: <http://support.diditbetter.com/premium-support.aspx> for more information. .

2.2 Application Overview

Add2Outlook

.Net Add-in for Outlook 2000, 2003, 2007 and 2010 connected to Exchange 2000, 2003 and 2003 SBS, 2007 and 2010 and for Hosted Environments.

Add2Outlook is a completely new product and was designed for those who use Outlook and want or need client-based, 2-way, unidirectional or bidirectional synchronization. Add2Outlook is an Outlook Add-in which combines and can replace the functionality of “Add2Outlook 3.0”, “CalendWare” and “Public2PrivateWare 2.6” by providing 2-way synchronization in one workstation based Outlook Com Add-

in solution. Add2Outlook provides a fairly smooth upgrade experience from those other programs, so please refer to the special upgrade instructions at <http://support.diditbetter.com/Forums/Thread.aspx?pageid=120&mid=180&ItemID=12&thread=111>. If migrating to hosted Exchange and you are currently using Add2Exchange, make a note of the Add2Exchange relationships, by opening the console and export the setup, save it and then remove all the relationships and select to remove the destination items prior to the migration. Then you will remake the relationships in Add2Outlook after the migration.

When installed, Add2Outlook consists of buttons or ribbon tools which are added to the bottom left hand corner of Outlook 2003 or the top of the screen in the Add-ins tab in Outlook 2007 and 2010. You can access the Add2Outlook options panel in Tools, Options, Com Add-ins (2003) or by right clicking any folder, in 2007 and 2010 by File, Options, Add-ins, Add-in options.

* The SyncNow button activates the sync process.

- The Start/Stop Timer will activate and deactivate the timer. The timer is started automatically when Outlook opens.
- The Add2Outlook console or options page creates the one-way or two one way (two-way) “relationships” from folders you want to sync. Each relationship is actually one way, made from the source and copied to the destination. Each of those relationships can be unidirectional or bidirectional in information flow. People confuse one way and two way to mean the information flows one way, from source to destination, or two way, with information flowing both ways, when editing a destination item and the change flows back to the source. All relationships are one way, and can be unidirectional or bidirectional on information flow. If you want anything made in folder one to get synced to folder two, then you need one relationship from one to two. If you want anything made in folder two to go to one, you need one relationship from two to one. Each of those 2 one way relationships can either be unidirectional or bidirectional on information flow, depending on the rules of THAT relationship.

A single one-way relationship is a relationship between 2 folders, calendar, contact or task, either in private-to-public, public-to-private, or private-to-private combinations available in an Outlook profile. Either folder can be within a private PST, server-side mailbox, or public folder. Although Add2Outlook does not have to be connected to an Exchange Server to do replication between folders within a PST; the most common use of Add2Outlook is to synchronize a group or public folder to a private folder and vice versa so that your smartphone or mobile device synchronization software, such as Microsoft’s Active Sync or Blackberry, can bring it to your smartphone.

The first time replication occurs, the items are copied from the source folder to the destination folder based on the rules of that relationship. The next time replication occurs; the items are updated, changed, untied and recopied or removed, depending on your predefined “relationship rules”. If a user makes changes to their destination copy of the source folder item, the relationship rules within Add2Outlook can be set to untie the original copy to preserve the changes made in the private destination copy and then Add2Outlook will make a new tied copy from the source. The rules can also be set to update the source from the changed destination copy. If the source item was deleted, the destination item can be deleted or the copy can be marked as “deleted”, creating an orphan item which will never be updated again. The Add2Outlook rule of the relationship can be set to do nothing at all, also leaving an orphan. You can also delete or mark the source item “deleted” if you delete the destination item copy, a very powerful feature which should be reserved for special uses and power users.

Once set up, Add2Outlook can work on a manual basis and can be set to a timed or reoccurring schedule in the background and is by default set to 5 minutes. The synchronization occurs on its own thread, thereby minimizing the effect on a user. In order for replication to occur, Outlook has to be open in the correct profile in order to synchronize and if syncing from a public folder, the Exchange Server has to be

available and online.

This product has almost all the same features as Add2Exchange Standard Edition, but is installed on the workstation, and unlike Add2Exchange, cannot replicate from public-to-public folders. Add2Outlook has the advantage over Add2Exchange because it works with PST files, which the server-based product could never do. For more information on our workstation and Outlook independent server-based product, Add2Exchange, go to: <http://www.diditbetter.com/products.aspx>.

The Add2Exchange product can be installed on the Exchange server, a Virtual Machine, a utility or file server for centralized relationship management and works with Outlook Web Access and most every smartphone and mobile device currently made. We do not recommend installing it on a Terminal Server because it gets automatically activated for all users, but it can be if this is not a problem. Add2Outlook can be installed on a non-dedicated workstation, but if many relationships are to be set up, in order to maintain a tight Exchange security model, the software could and should be installed on a dedicated replication workstation.

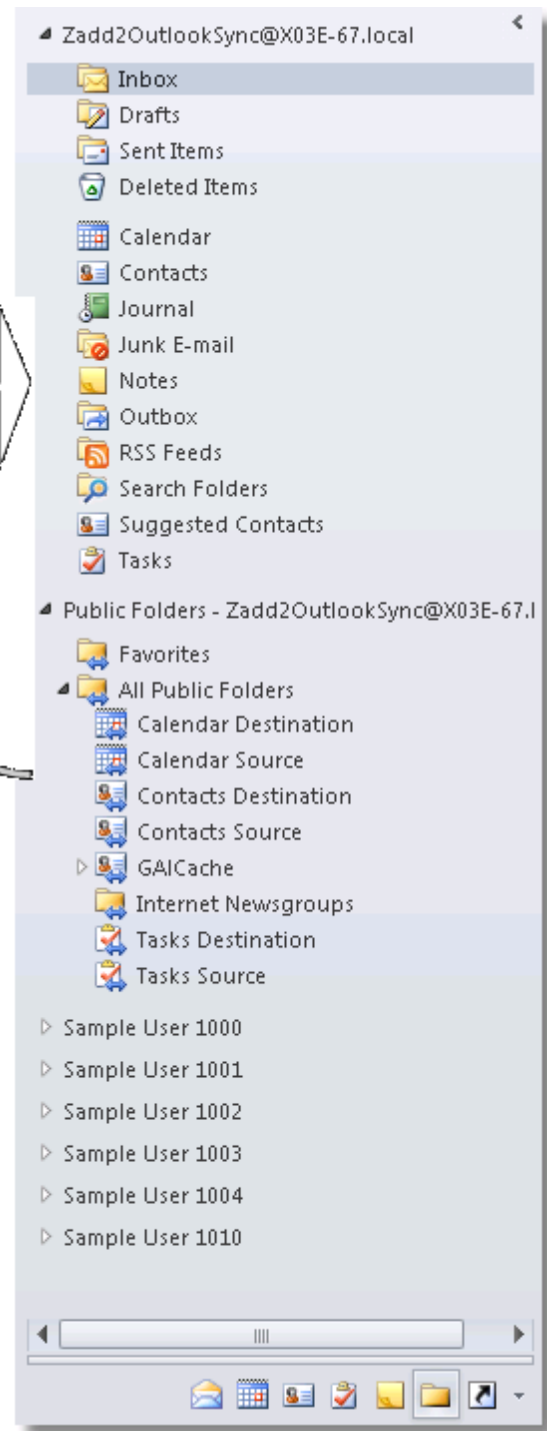
Add2Outlook can make an unlimited number of relationships per folder type, but is not the ideal product if you are not in a hosted Exchange environment because it uses some bandwidth. If in a non hosted environment or replicating to PST files, if possible, consider using the Server Side family of products: Add2Exchange Standard and Add2Exchange Enterprise. Each relationship is treated separately and can act on the same or different folders for two-way replication. Add2Outlook and Add2Exchange can coexist in the same organization. Check with Technical support if this applies to you for best practices in this unique situation.

The following are scenarios of how Add2Outlook can solve common calendar, contact, task or note replication needs. In our examples, we will use calendar replication.

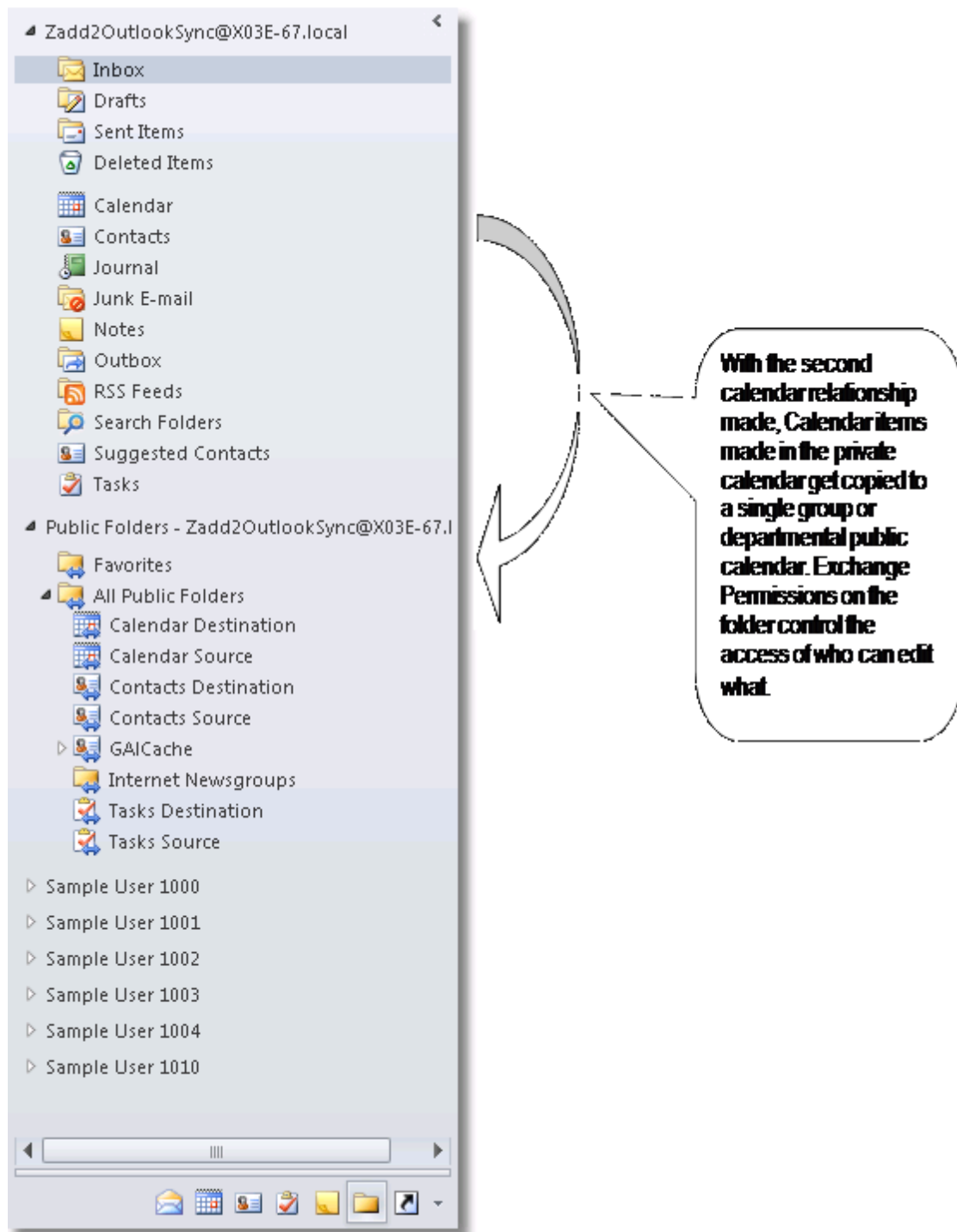
2-way Public-to-Private Calendar Replication

This relationship scenario is useful to have public calendar items automatically copied to a local private calendar folder so it can be brought down to a smartphone or mobile device. All calendar items falling within the replication date range specified in the relationship are replicated.

If you make an appointment in the public folder, the item automatically gets copied or updated to every user with an Add2Outlook or Add2Exchange relationship on that folder. Items are replicated from public (source) to private.



The second relationship can be set so that any items created on the smartphone or mobile device or in Outlook can be copied to that calendar (or even a different departmental calendar).

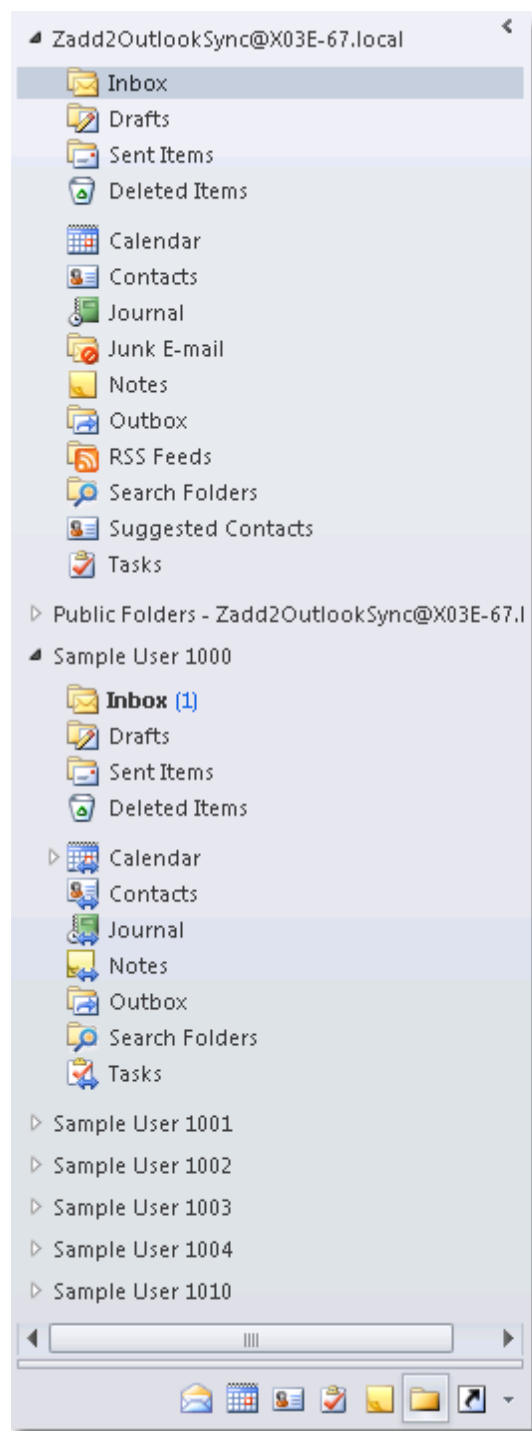


Local .PST to Server-side Mailbox Folder or Server-side Public Folder

This unique situation, where the private calendar is located in an (offline) Outlook “.PST” file must be replicated to a server-side mailbox calendar or server-side public (personal) calendar. Workstation based software such as Add2Outlook are the only solution – it can't be done in server-based software because the PST file folder is usually not available to Exchange.

Private-to-Private Calendar Replication

This scenario can be used within a user's private folders to another private folder. It is possible to use Add2Outlook if replicating from server-side mailboxes to other delegated server-side mailboxes, but our other solution: Add2Exchange for calendars is a much more stable solution for this. If Add2Outlook is used for this scenario; the user must have full OWNER status to the destination user's mailbox (at least reviewer of the Mailbox and Owner of the replicated folder). The folders must be open automatically on Outlook startup, the replication will wait to sync in offline cached mode when the Exchange Server goes back online. The workstation has to always be in Outlook and should not go to sleep or go offline.

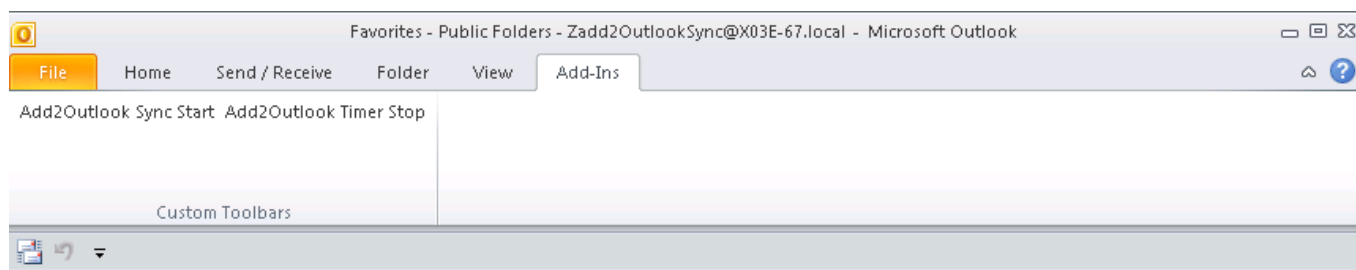


Public-to-Public Replication

This scenario CANNOT BE CREATED with this client-side product. If this kind of relationship is desired, try Add2Exchange Standard or Add2Exchange Enterprise.

2.3 Operation

If the program is set to timed execution, your computer must be on and Outlook running with proper access to the calendars selected. At any time you can replicate by pressing the **Sync Now** button from the lower left Toolbar (Outlook 2003) or from the Add-ins tab accessed from the top menu option in Outlook 2007 and 2010 as shown below:



A copy of all source folder items within that date range will show up in the destination folder. Any reoccurring items will show up if the original “master” item is within the date range. If the reoccurring items do not show up, increase the “Prior” part of the date range to a date before the master copy of the reoccurring appointment.

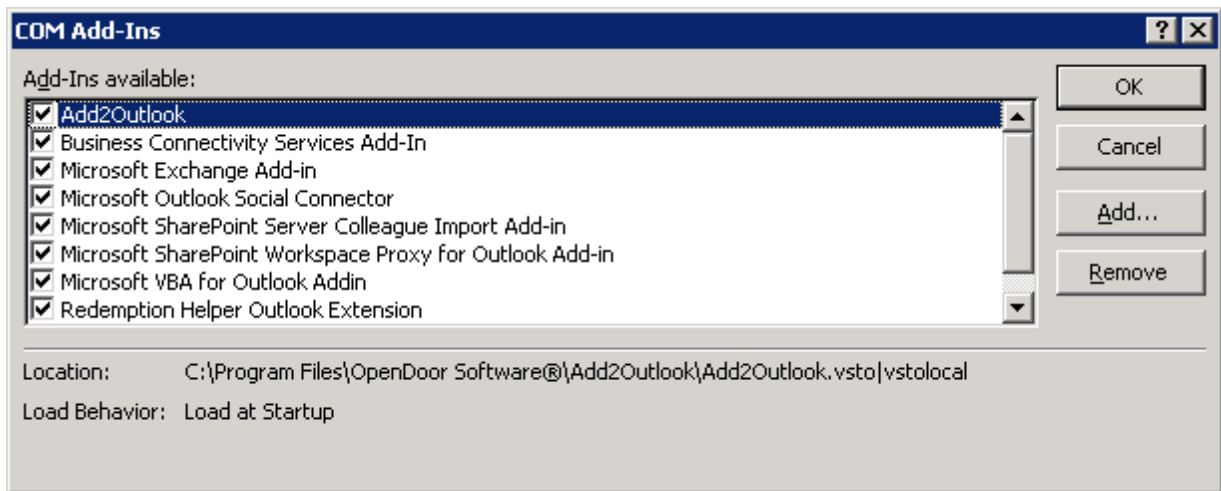
For tasks, the date range specified in the relationship are for the dates of the task start and complete. For all tasks or all calendars, use the 0 prior and 0 post.

Hint: If you have many calendar items on the source calendar, do not make your calendar synchronization replication time period too short (recommend at least 30 minutes to an hour) and do not make the replication time frame too long (90 days is common) because of limited resources on your computer and the increased traffic on your network.

If it does not sync, please recheck the prerequisites and make sure the Add-in has been enabled. If you right click a folder and go to properties and there is no Add2Outlook tab, the Com Add-in may be disabled.

To Enable Add2Outlook in Outlook 2003: Go to **Tools, Options, Advanced, Com Add-ins** and put a check in **Add2Outlook**.

To Enable Add2Outlook in Outlook 2007: Go to **Tools, Security Trust Center, Manage, Com Add-ins** and put a check near the **Add2Outlook** option.



To Enable Add2Outlook in Outlook 2010: Go to **File, Options, Add-ins, Manage, Com Add-ins**, click **Go** and put a check near the **Add2Outlook** option.

Close Outlook, wait a few seconds and go back into Outlook.

If this does not activate Add2Outlook, go to the troubleshooting section at the end of the manual or the technical bulletins at: <http://support.diditbetter.com/technical-bulletins.aspx>.

For the Add2Outlook FAQs, go to <http://support.diditbetter.com/add2outlook-faq.aspx>.

You can always ask for free email support by using this link: <http://support.diditbetter.com/support-request.aspx>.

3 Add2Outlook Installation Guide

This guide explains of the Add2Outlook installation, purchasing and licensing processes.

3.1 System Requirements

All installations require **Microsoft .NET Framework 2.0 OR NEWER**. It is highly recommended that you perform all current **CRITICAL** Microsoft Updates to your machine and reboot after all updates **before** installing Add2Outlook.

Configurations which do not meet the minimum requirements outlined here may not be supported under the terms of your software assurance agreement. Consult your agreement for details.

Hardware Requirements

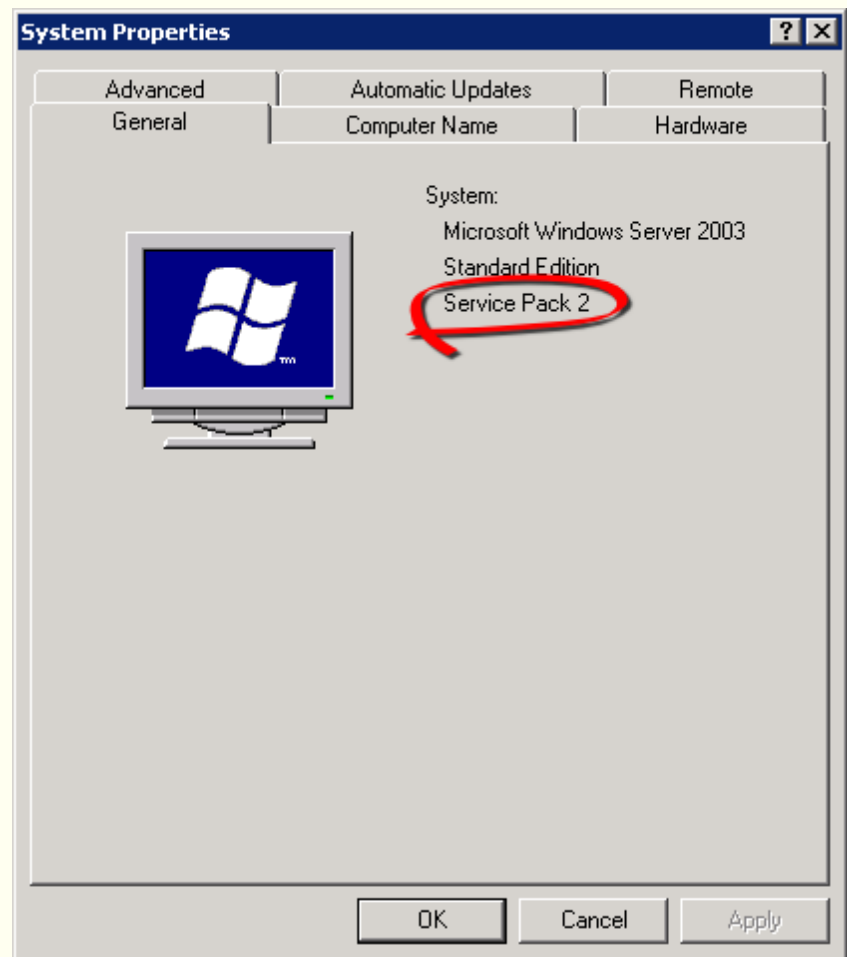
Feature	Minimum Configuration	Recommended Configuration
Free Disk Space	• 25 MB	• 1 GB
RAM	• 512 MB	• 1 GB

Operating System Requirements

- Windows XP SP2 and higher
- Windows Vista

**Tip**

You can verify your Windows Service Pack level by right-clicking *My Computer*, selecting *Properties* and looking under the *General* tab.



System Properties Dialog

Below are the list of things needed for proper operation of Add2Outlook:

- **Server Software:** None required. Add2Outlook connects to and supports: Microsoft Exchange 2000, 2003, 2007, 2010, and all versions of SBS.
- **Workstation Software:** Microsoft Outlook 2003 or newer. Add2Outlook does not require any other software installed on the workstation; however, there must be some sort of smartphone sync support (Blackberry, Active Sync, Mobile Sync, etc.) if the information is to be viewed on the smartphone or mobile device.
- If the Workstation you are installing on has Windows (almost any version), a supported version of Outlook and 2 gigs of ram is suitable. The more ram the better.
- **If you have three or more users whom you are going to set up replication relationships for, we highly recommend creating a dedicated synchronization workstation, so the system can operate without user interference. If you make a dedicated synchronization workstation for this purpose, you should also consider making a “synchronization service account” (like “zA2OSync”) to maintain a higher level of security. With a service account, one user does not need to have access to all the folders and mailboxes.**

- You can have a mix of 2000/XP and 2003 Add2Outlook installs working off the same folders. Add2Outlook can be installed on Outlook 2003 with Exchange cached mode, but needs to be connected online to make relationships and sync or wait until it is online to sync. If there are more than one Add2Outlook installations in your environment, it would be best practice to consider putting all relationships on a dedicated workstation for syncing purposes and taking that replication machine out of cached mode. If this configuration is not possible, it is highly recommended that all workstations who are working off the same folders be running the same version of Outlook and Add2Outlook and have the latest Microsoft critical service packs.
- The latest version of Add2Outlook is always recommended and is certified to work with the current MS critical service packs in effect at the time. All Diditbetter.com software available from our website is certified to work with the current MS critical service packs in effect at the time.
- If Add2Outlook is set up to use Exchange, to set up and modify relationships, users have to immediately connect in Outlook with no passwords required – before they can set up a relationship and/or replicate. Usually this is possible in hosted mode when Outlook is in NTLM authentication mode.
- Since Outlook needs to be open and in the profile to synchronize, if Add2Outlook is installed on a dedicated replication server, it is recommended you put an Outlook shortcut in the Startup of the users profile so Outlook will open automatically, log in and synchronization can continue.
- It is best to turn off MS Updates, and select download and notify so updates can be managed. The system can be rebooted after every set of MS critical updates and Outlook can be reopened automatically to make sure replication continues. This is not a prerequisite, but is suggested so updates can be managed and a technician can ensure the workstation goes back into Outlook correctly to start synchronization.
- It is best to turn off Antivirus active file scanning from the Add2Outlook installed directory so synchronization can work independently.
- Add2Outlook will work in offline or Exchange cached mode if Outlook and the Add2Outlook relationships are set up to work with offline public folder favorites as specified within this manual.
- Turn off power management on the Network Interface Card so the system does not turn off that device to save power and thus interrupt synchronization.
- If this is not a “hosted exchange” installation or synchronizing to PST files, please consider the server-based products (Add2Exchange Standard and Add2Exchange Enterprise) for a faster, easier and more manageable installation with more capabilities, better utilization of resources, and of course, fewer points of failure for Windows, Outlook and your Users.

In order to install Add2Outlook on a machine, the user who installs the software must have “Administrator” access to the machine during the installation to install software and make registry keys. If antivirus or malware protection programs block access to the registry, this should be turned off during the installation and relationship modification. To fully activate, the software must be installed and Outlook must be opened to activate the Add-in, and for relationship creation, deletion or edits.

Important Tip: If applicable on the target machine, User Access Control (UAC) has to be turned off and the system rebooted prior to the initial installation and configuration. UAC can be turned back on after a full installation and Outlook being open for the first time; however, it may need to be turned off again to install any updates to Add2Outlook. To turn off UAC, on the machine, Start, Run, msconfig. Go to Tools, UAC Settings and select off or never notify. Reboot prior to the installation.

3.2 Prerequisites



Be Aware

Add2Outlook is a client-side application which must be installed on a workstation (client) running Outlook, XP or 2003. Add2Outlook can be installed on any workstation with Windows operating system 2000 and newer. Add2Outlook can be installed on a Terminal Server, but is not recommended, and is **not** covered under our free supported agreement. Our server-based product Add2Exchange for Calendars is a better solution for these scenarios.

- Back up your folders before synchronization to ensure your data integrity if you should do something wrong. If things go wrong, use the support site to let us help you.
- It is strongly advised not to install Add2Outlook on the Exchange server itself, only a workstation with Outlook 2003, 2007 or 2010. If you can install things on your Exchange server, you are not in hosted Exchange mode and should consider using Add2Exchange for synchronization. Consider a stand alone synchronization installation rather than putting this on a users workstation to enable fast and efficient synchronization.
- You must be logged in to Windows as the User to install and operate the Add2Outlook® console software.
- You must be an administrator of your machine.
- You must have User Access Control (UAC) turned off and the system rebooted before installation. If you are being prompted to elevate privileges during the installation, you have UAC turned on. UAC can be turned back on if desired after a full installation and Outlook being opened to enable for the profile for the first time; however, it may need to be turned off again to install any updates to Add2Outlook. To turn off UAC on the machine, Start, Run, msconfig. Go to Tools, UAC Settings and select off or never notify. Reboot prior to the installation.
- You should have the system patched with all the critical updates from Microsoft. Not just Windows updates, but Microsoft updates and reboot the system prior.
- You must run the full installation for Add2Outlook to run the prerequisites prior to running the software.
- You must not have any group policies that prohibit the installation of software.
- Outlook must be closed to install Add2Outlook.
- When you open Outlook and create a relationship, or are upgrading from a previous version, you must be able to immediately connect to your Exchange server.
- You should not install or upgrade offline.
- You must have "Owner" permissions to all the source and destination folders desired in making a relationship(s). Permissions: To complete the set up and configuration of an Outlook calendar relationship, you must have the appropriate client OWNER permissions to the source and destination calendar folders and you must be online. This can be set in Outlook from an Outlook profile, from the Users Outlook, by giving Owner permissions from Exchange system manager or Exchange management console or through your Host provider's control panel they provide.

*** If antivirus or malware protection programs block access to the registry, this should be turned off during the installation, opening up Outlook to activate the Add-in, and for relationship creation. It can be active for normal operation or enable exclusions for the program.**

Client Prerequisites: Outlook 2003 or newer.

Supported Operating Systems: Windows 2000, Windows Server 2003, Windows XP, Win7.

Server Prerequisites: None. Do not install this program on the Exchange server. This product is supported in Windows 2000, Windows XP, Vista and Windows 7 to connect to Microsoft Exchange 2000, 2003, all small business servers and 2007 and 2010.

First Essential Prerequisites

- .Net 2.0 (at least) must be installed and the system rebooted.
- User Access Control is turned off. After the system installs .net and turns off UAC, you should reboot your computer.
- Make the user part of the local machine Administrators Group. This product must be installed as the user who has administrative access to their machine during the install. The Add-in will show up in Outlook's Com Add-ins section, and should be installed and activated for each User/Outlook profile of that machine. If your users are not administrators of their own machine, you may have to raise permissions for the user to "administrator" for the local machine at least for the first install and for updates. Go to My Computer, Manage, Users and Groups, and Administrator.
- Make sure the user's DOMAIN account name is there if connecting to a domain, or local user account if not.

Second Essential Prerequisites

Assign the appropriate permissions to the selected sync service account. Whichever method you choose, it is VERY IMPORTANT that you repeat the steps below for ALL MAILBOXES which contain folders to be synchronized in a Private-to-Private relationship.

If you can right click on the public folder calendar you want to replicate to or from, go to Properties and see the Permissions tab, to verify you are an Owner of the folder. If you do not have the permissions, you can ask your exchange Administrator for assistance or if you have the proper access, use the following instructions:

To give the user the permissions to the public folders to be replicated to or from, you can do this in several ways.

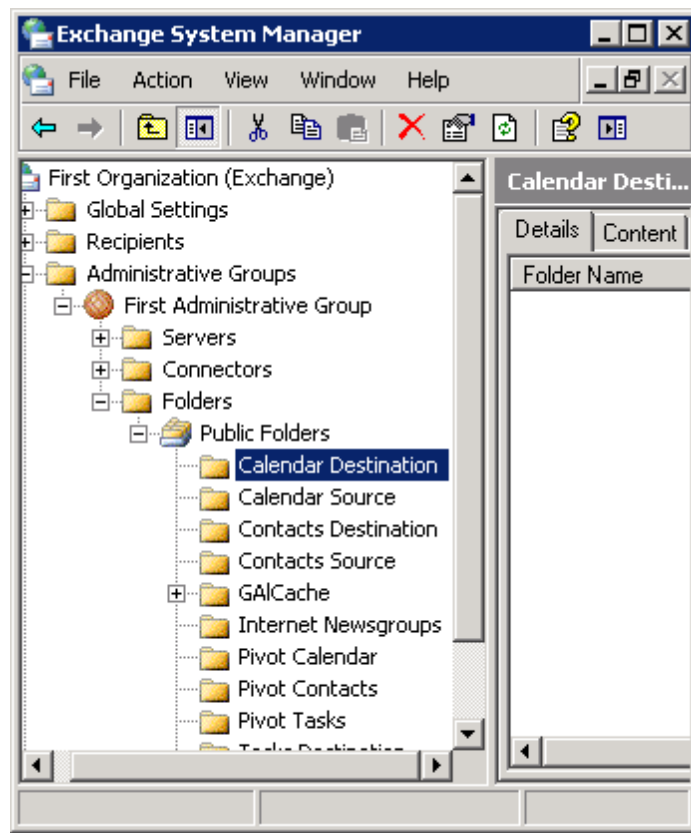
Option 1: Sometimes the easiest way is to have each user grant permissions by right clicking the appropriate folder to be replicated to or from and select Properties. Then go to the permissions tab, add the user who is going to do the replication and select Owner. Do this for all folders you are going to replicate to or from for that user.

If the folder is a public folder and you do not have a Permissions tab, you will have to do this from the user who created the folder, someone who has Owner permissions or from Exchange system manager or Exchange management console.

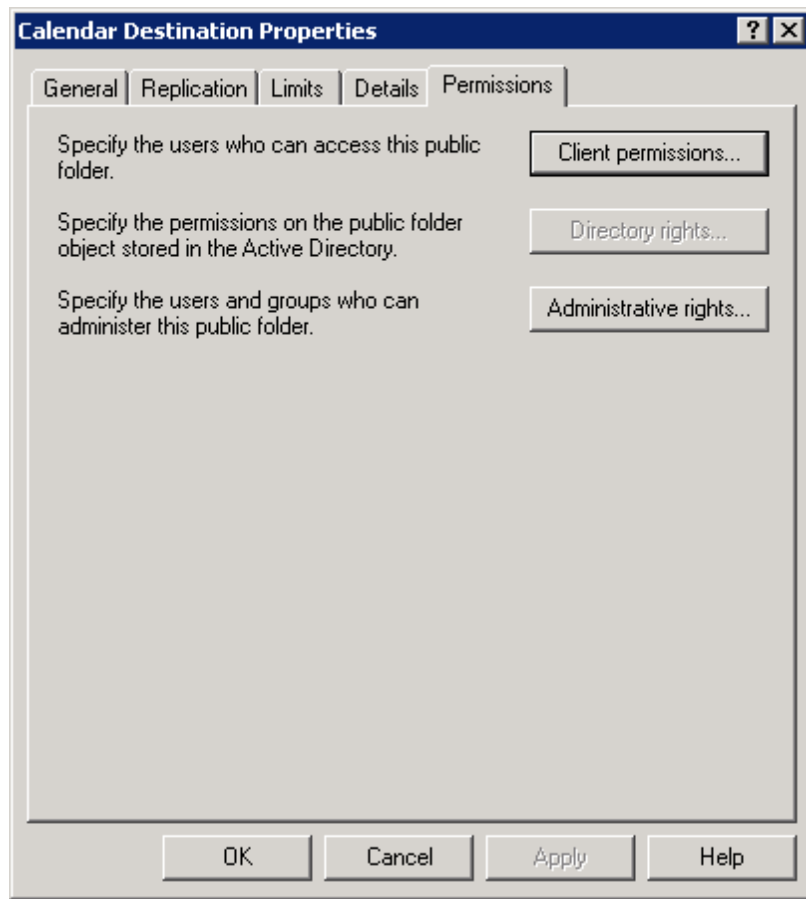
- **Exchange Server:** click **Start, Programs, Microsoft Exchange, Exchange system manager**

(2003) or Exchange management console (2007 and 2010).

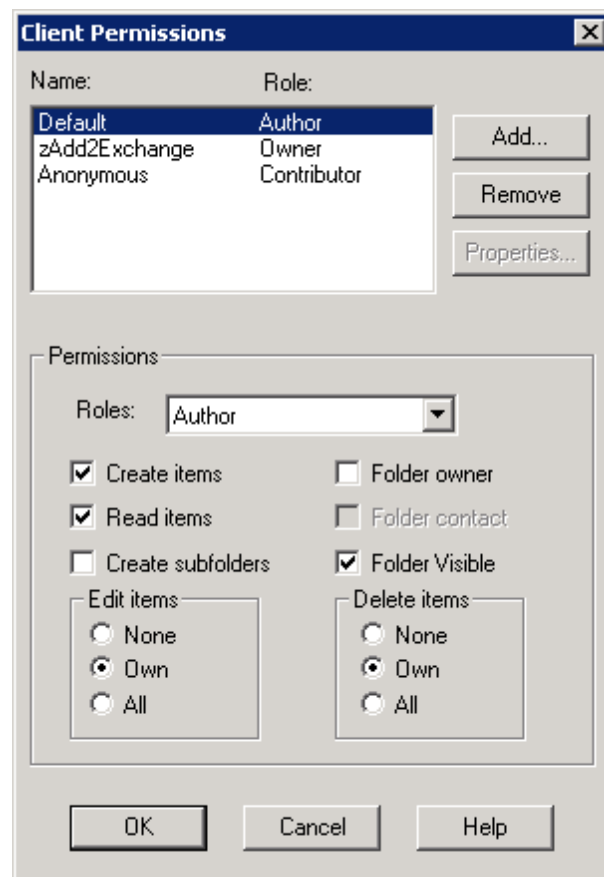
- **Exchange 2003:** in Exchange system manager, drill down to the folder you want to assign permissions to either through Folders or Administrative Groups.
- **Exchange 2007:** in Exchange management console, select Toolbox, Public Folder Management and Properties of the folder.



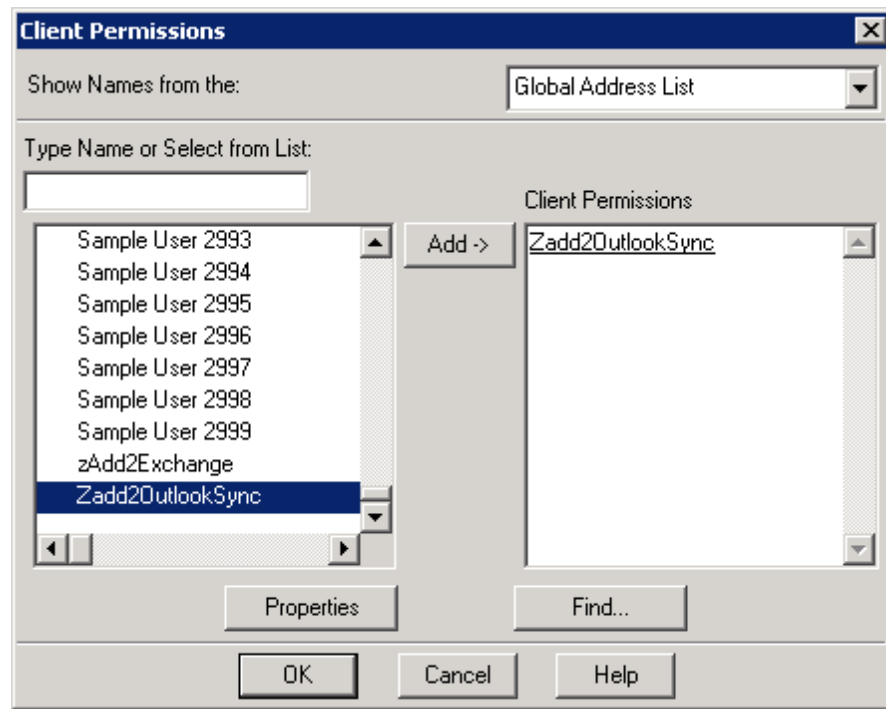
1. Right-click the folder you want to assign permissions to and click **Properties**, then click the **Permissions** tab.



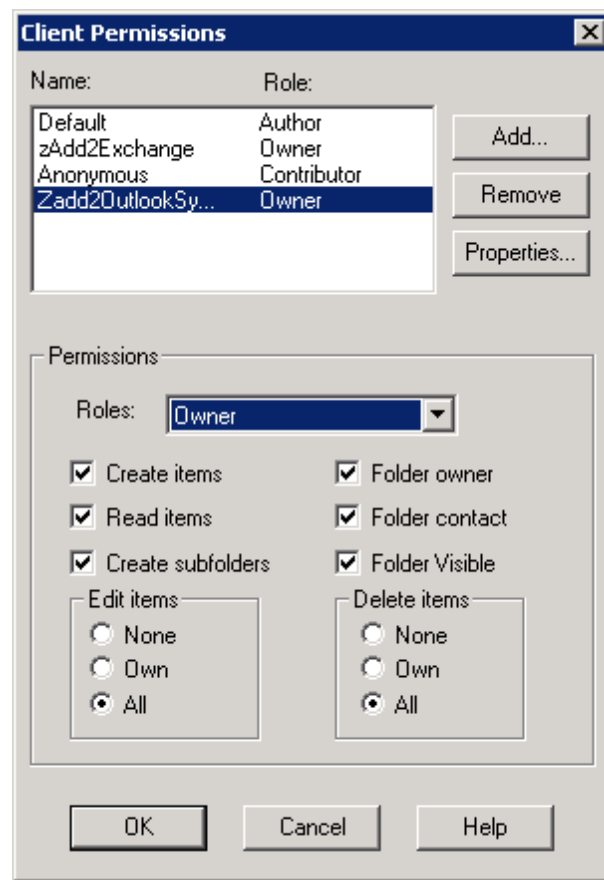
2. Click ***Client Permissions***.



3. Click **Add...** to add the replicating user's account as an Owner.



4. Select and add the user that you chose from which to do the replication. In this case, we chose the zAdd2OutlookSync account.



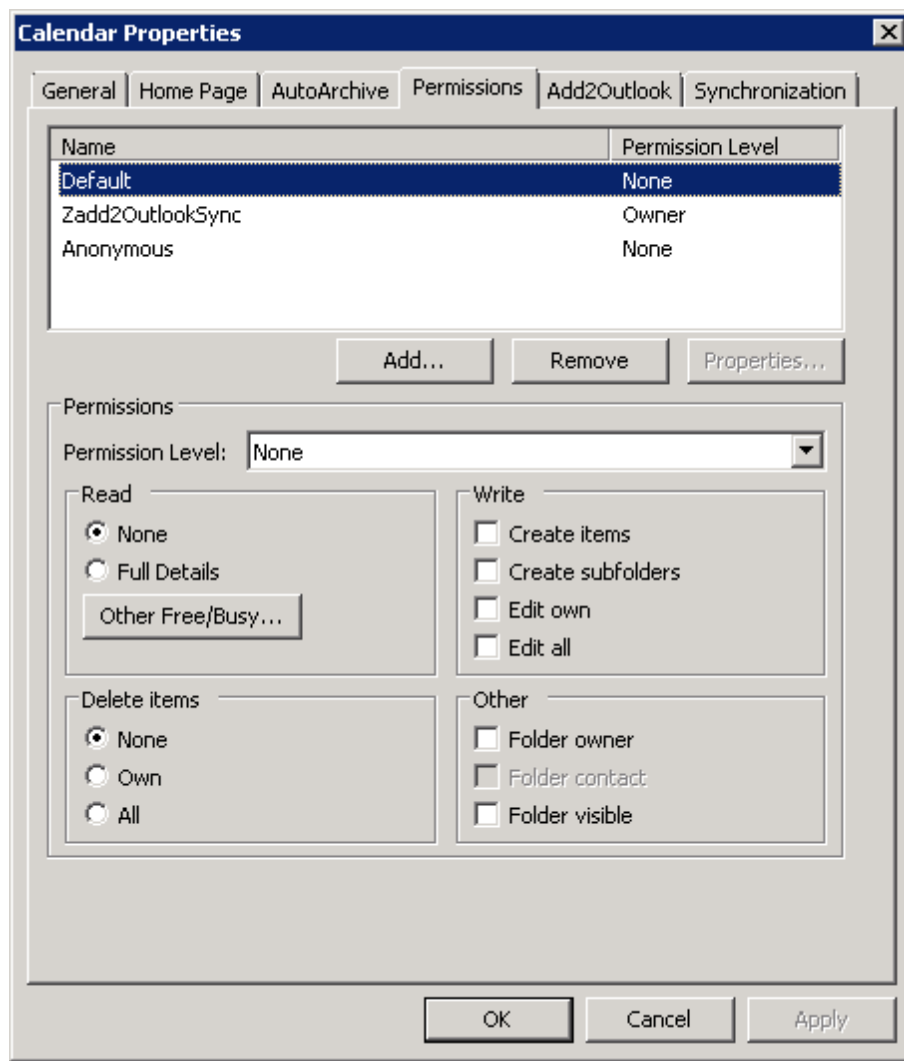
5. Click the **Roles** drop-down and click **OWNER**. Click **OK** to close the Client Permissions dialog.

Repeat these steps for every public folder which Add2Outlook will synchronize to or from and for every user who needs Add2Outlook set up on the folder.

Option 2: If you are using a synchronization Service Account, you can assign rights in a more global fashion. If you have administrative access to the Exchange Server, you can give the user Full Mailbox Management Permissions to the folder from within Exchange's Management Console. If you do not know how to do this, or do not have access please ask your administrator for assistance.

Private-to-Private Relationships or Public to other user's Private folders: If you are trying to make a private-to-private relationship or public to several other user's private mailbox folders, you will have to give owner delegation to other user's folders. You can do this in several ways.

Method 1: You can give permissions directly from within the other Outlook.

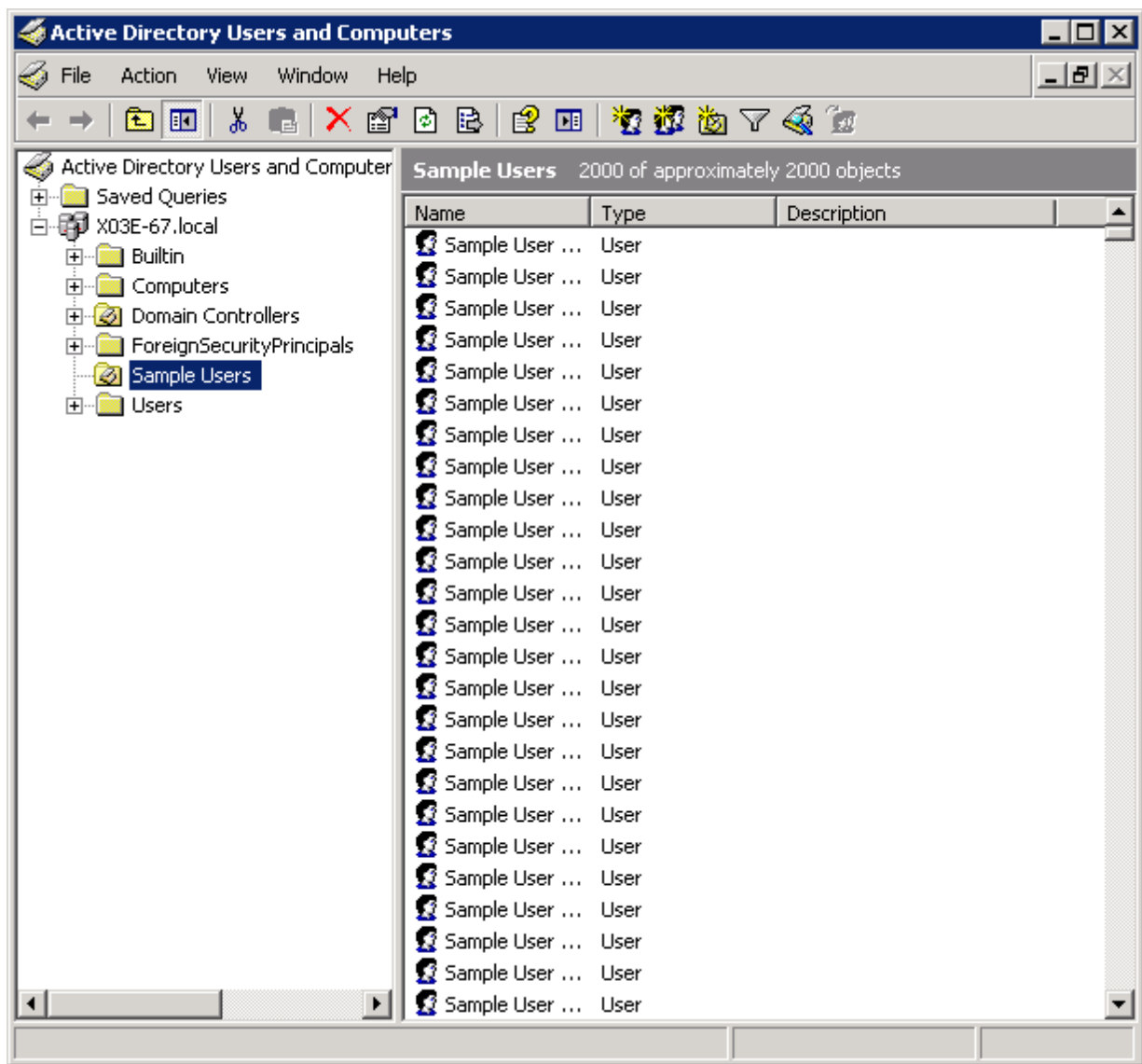


- From the users account, Right click the folder from within the mailbox; go to **Properties and Permissions** page.

Method 2: If your Exchange is not in hosted mode, and you have access to the Exchange Server and Active Directory, give the permissions from within Active Directory (Exchange 2003) or log into your Exchange Management Console to give permissions as shown below.

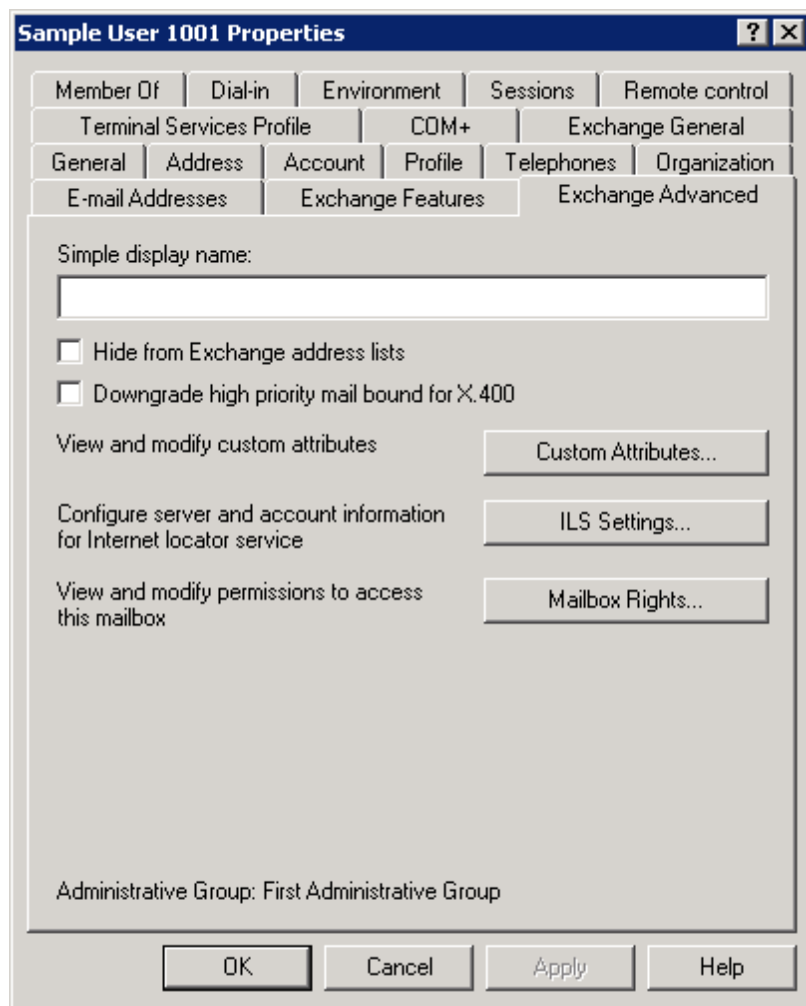
Tip: If you are in a hosted environment, you may not have access to the following two methods and may have to use the host providers web based permissions utility and section above.

Exchange 2003: Assigning Delegation by taking "Ownership" of a user's Mailbox in Active Directory.

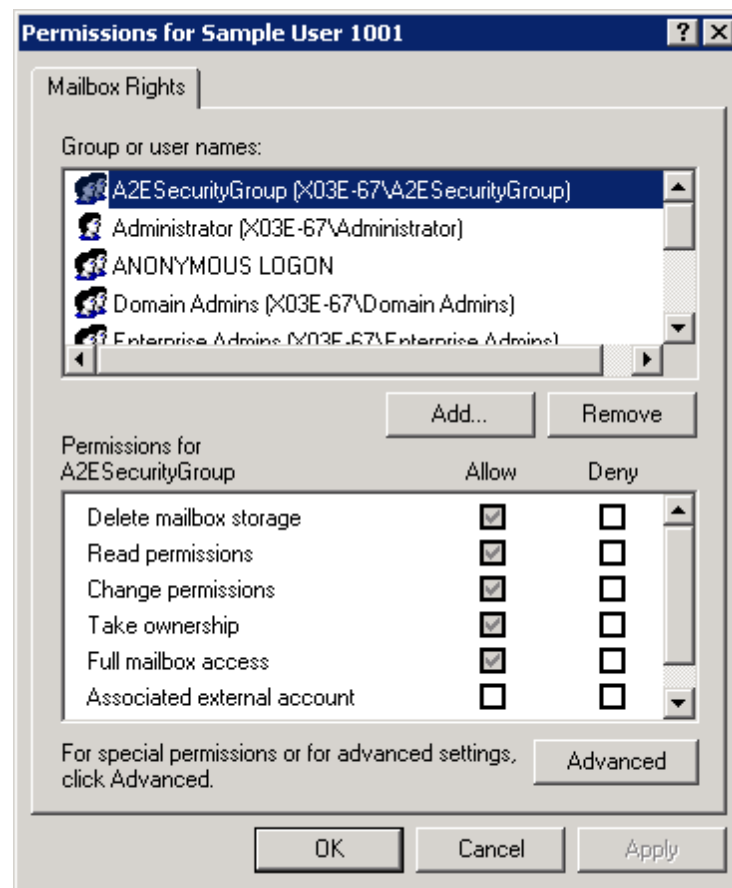


1. Click **Start, Settings, Control Panel**, double-click **Administrative Tools** and double-click **Active Directory Users and Computers**.
2. Double-click the user whose mailbox you wish to create a relationship for and assign permissions to it.

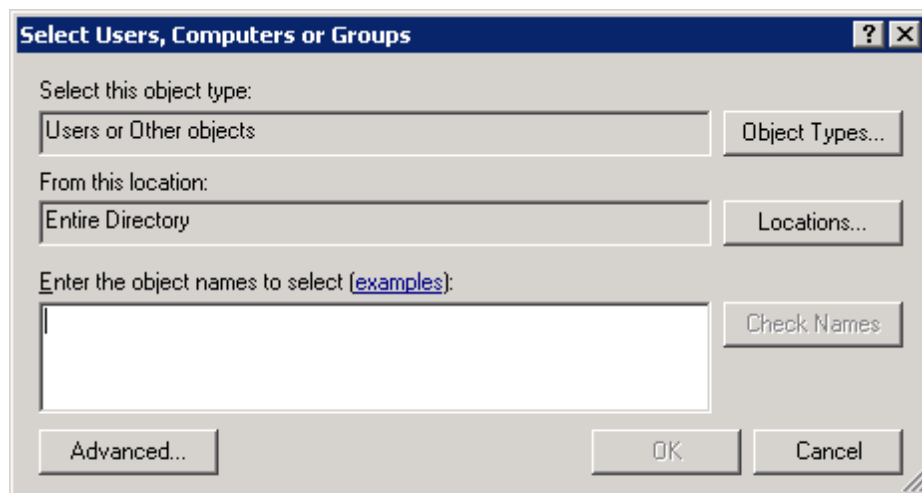
Note: If the Exchange Advanced tab does not show up in the **User Properties** dialog, **Cancel** and then click **View, Advanced Features** in the Active Directory Users and Computers Console.



3. Click the **Exchange Advanced** tab. Then click the **Mailbox Rights...** button.

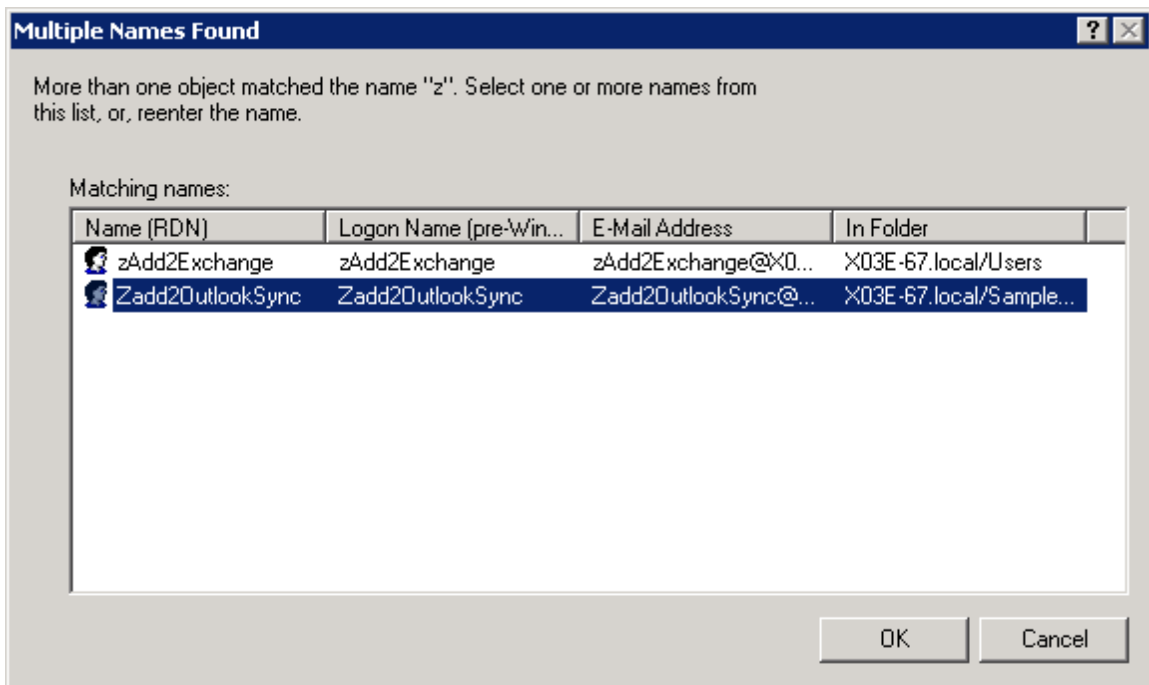
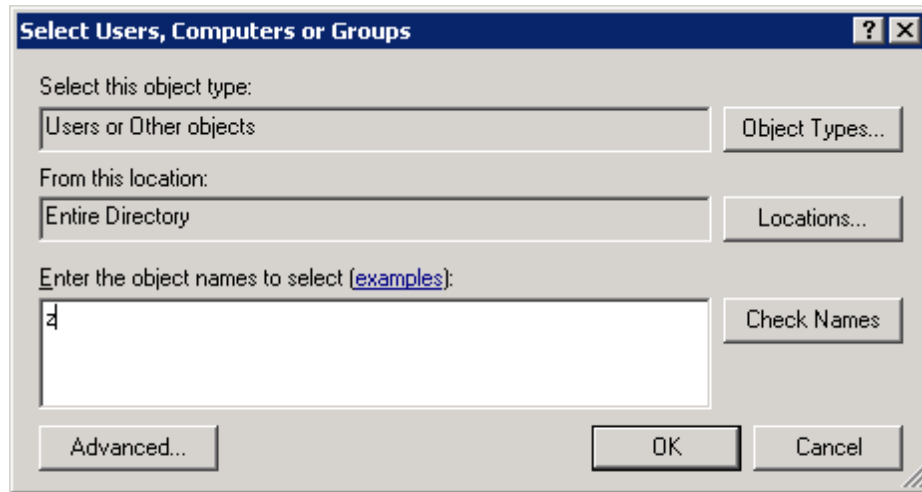


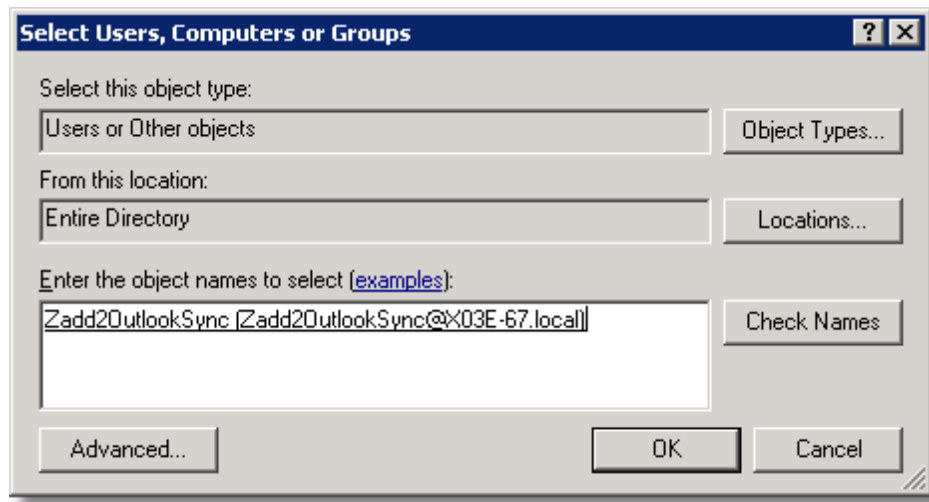
4. Click **Add...** to add the user that needs the permissions to sync the relationships.



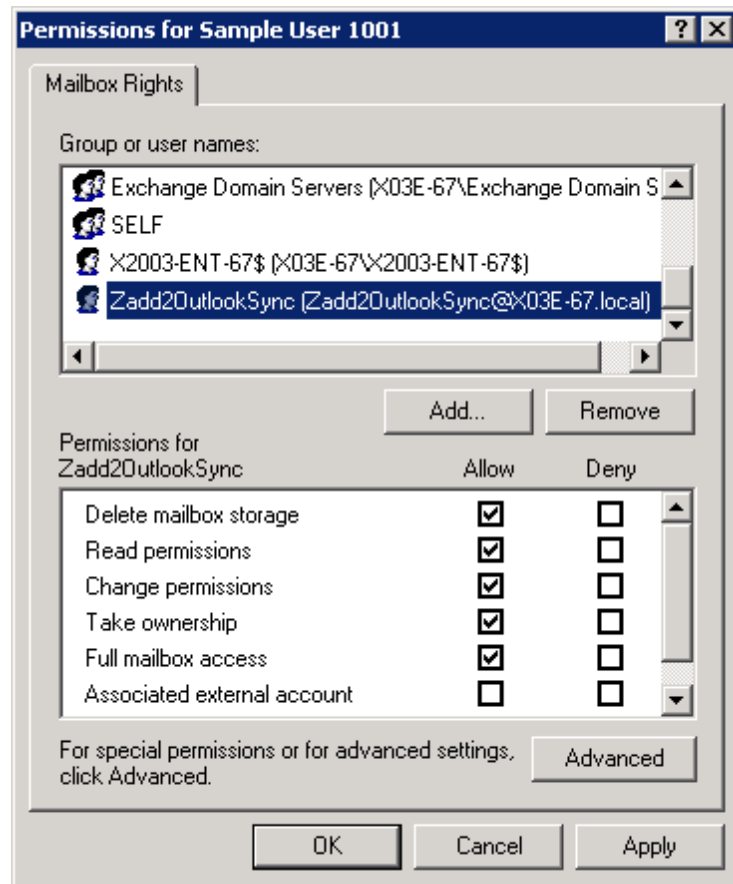
Note: You may need to type in the name of the user you want in the "Enter the object names to select

(examples):" box then click **OK** in order to actually add them. Or you can type the beginning of the name and click "**Check Names**" to select the user (see examples below).





5. Select the user, click **Add** then click **OK**.



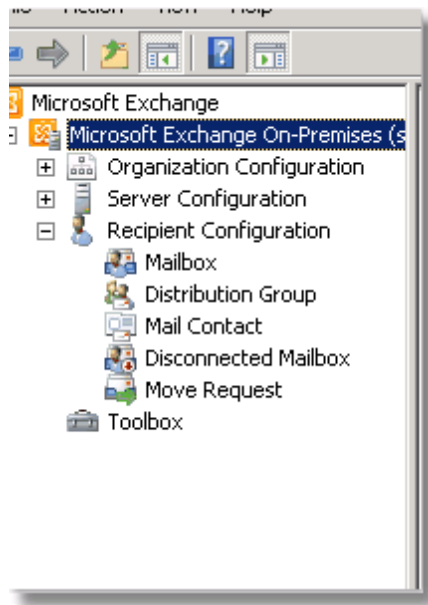
6. With the Service Account user selected, check the **Take ownership**, **Full mailbox access**, and **Read**

permissions check boxes. Click **OK**.

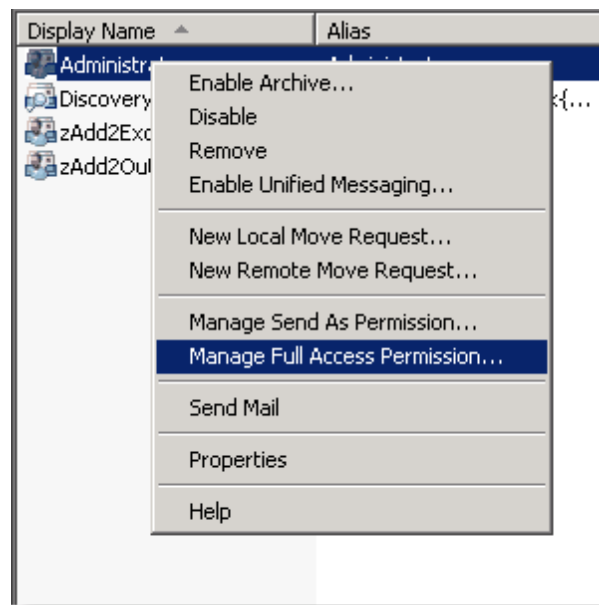
Method 3 with Exchange 2007 and 2010: You can give permissions from Exchange Management Console in Exchange 2007 and 2010.

Tip: If you are in a hosted environment, you may not have access to the following method and may have to use the host providers web based permissions utility.

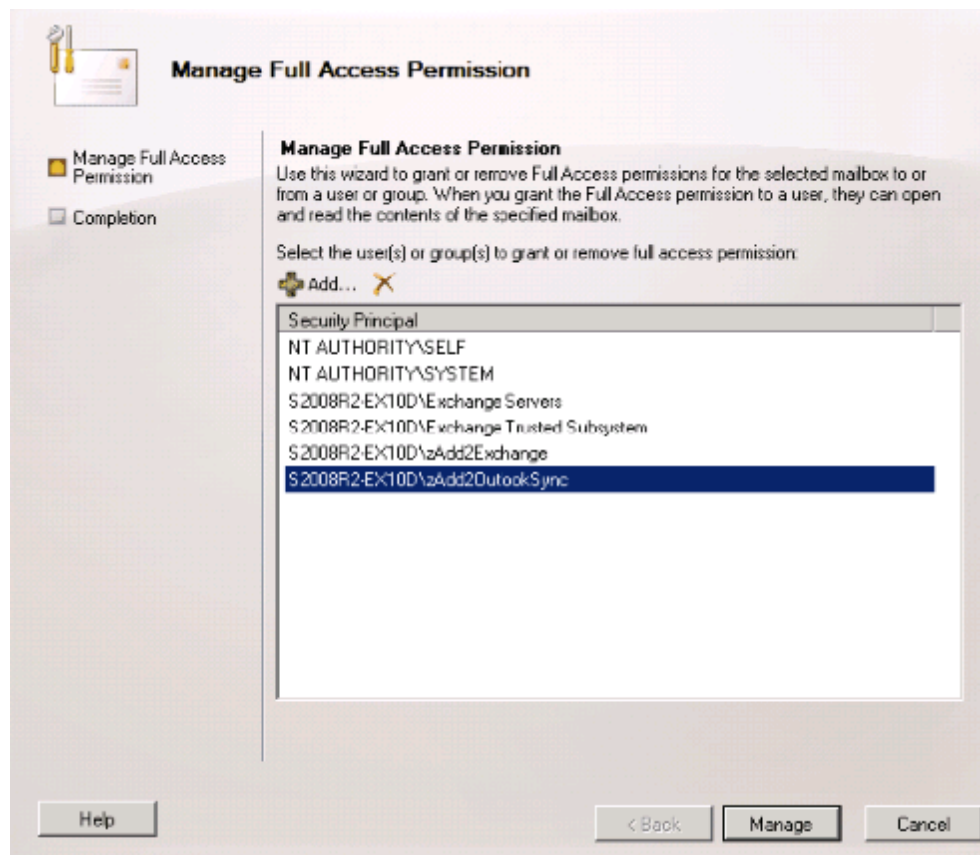
1. Select and run the **Exchange Management Console** on the **Exchange Server**.



2. Select the **mailbox(s)** in the **Recipients Container**.



3. Select a user, right click, and select **Manage Full Access Permission...**



4. Add the Add2Outlook Synchronization Service account and press **Manage** to complete.

Do this for any mailbox necessary for synchronization relationships.

3.3 Creating A Service Account

If you have three or more users whom you are going to set up replication relationships for, we highly recommend creating a dedicated synchronization workstation, so the system can operate without user interference. If you make a dedicated synchronization workstation for this purpose, you should also consider marking a "synchronization service account" (like "zA2OSync") to maintain a higher level of security. With a service account, one user does not need to have access to all the folders and mailboxes.

3.4 Cached Mode

Add2Outlook is Exchange Cached mode aware, which means it will not error when in Cached Mode, and depending on how you set up your relationships, it will replicate when offline, but only to the "stale" public folder. It will not replicate to private mailboxes when offline.

You can set up a relationship in Cached Mode when connected.

You have to be online to license the program.

Add2Outlook will replicate if in Cached mode and the system is connected.

If Outlook is offline, the Add2Outlook Console will be unavailable. Connect to the Exchange server and reopen the relationship Console.

If offline mode is required, you should set up your relationships to the public folder favorites instead of setting up an OST file as outlined in Making Relationships steps.

Set up Outlook with the public folder as a public folder favorite, and then in the Add2Outlook Console, set up the relationship to the public folder favorite.

If the program is set up so the source or destination folder is to the Exchange public folder favorites, synchronization will occur to that folder, but will not update the original folder until back online.

Note: You cannot edit the existing relationship while offline, unless the folders are available to Outlook such as to a PST file, public folder favorite or private folders.

3.5 Offline Mode

*** Skip this option if you have decided to create a standalone dedicated replication box, or if you are replicating Private-to-Private or Private-to-Public for more than one user.***

Some mobile users want to set up the program on a laptop, so they must work with offline folders. This is not the optimal configuration, as it would be best to have the replication server always connected, and synchronizing, but in some configurations is it the only way and is possible if desired.

The best practices of synchronization would be to set up a standalone Add2Outlook workstation, and have it in Outlook and syncing 24/7 so the mobile device is always up to date and the most up to date information is available. The Add2Outlook box should be online and replicating 24/7. That way when the

user connected via mobile device or Outlook Web Access, or the laptop is not connected, the replicated data from a dedicated replication server would always refresh the offline copy without regard to what was saved in the OST. The Exchange and Outlook synchronization would take over and all data would be up to date and continue to be up to date to all connected devices.

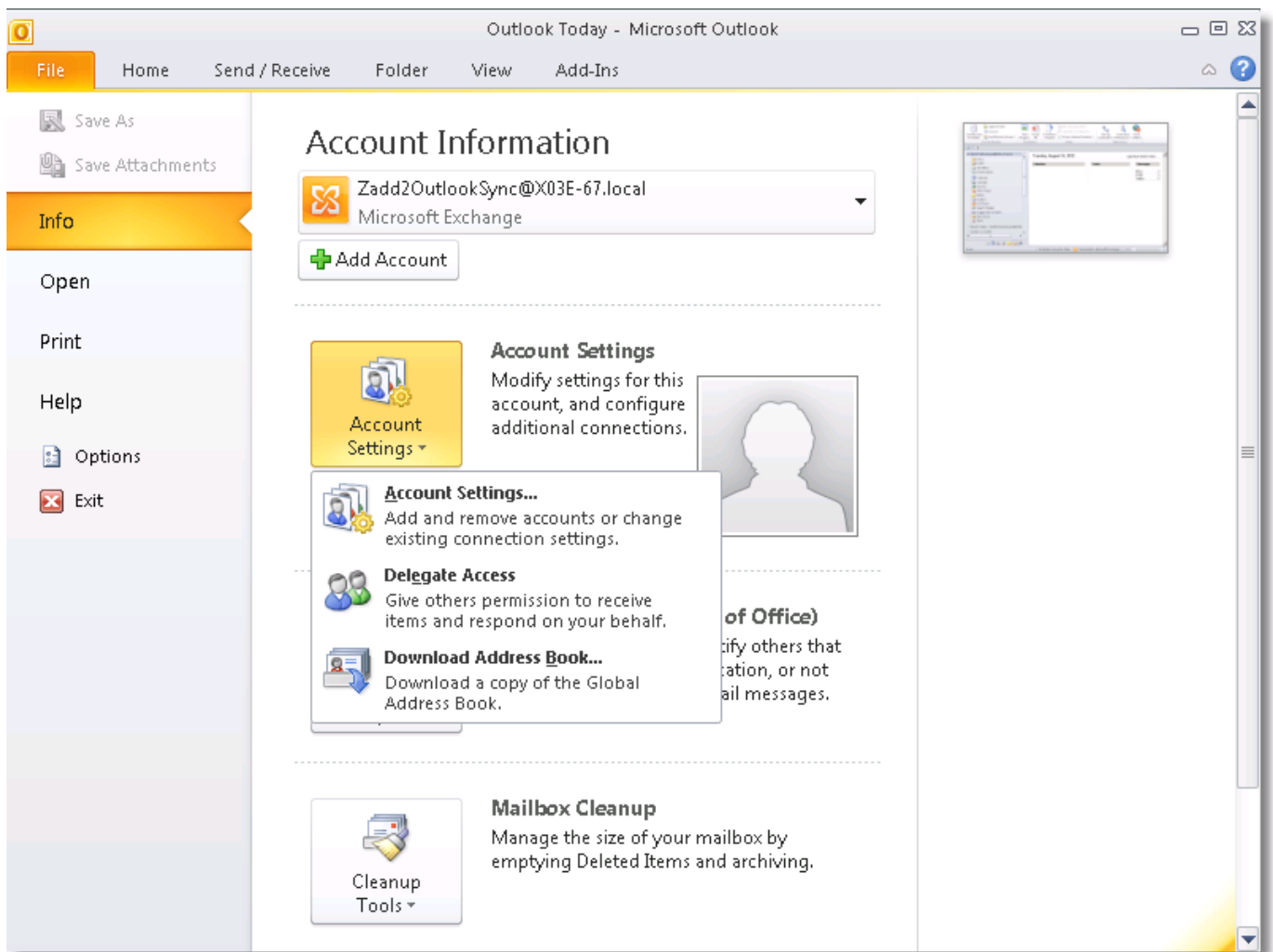
Before the program will replicate, it tests to see if the folders are available and from an infrastructure point of view, the standalone replication workstation is a much better configuration than having Add2Outlook on a mobile laptop. Also if the laptop is stolen or damaged, the replication settings may not be retrieved and this presents other hurdles to continued replication.

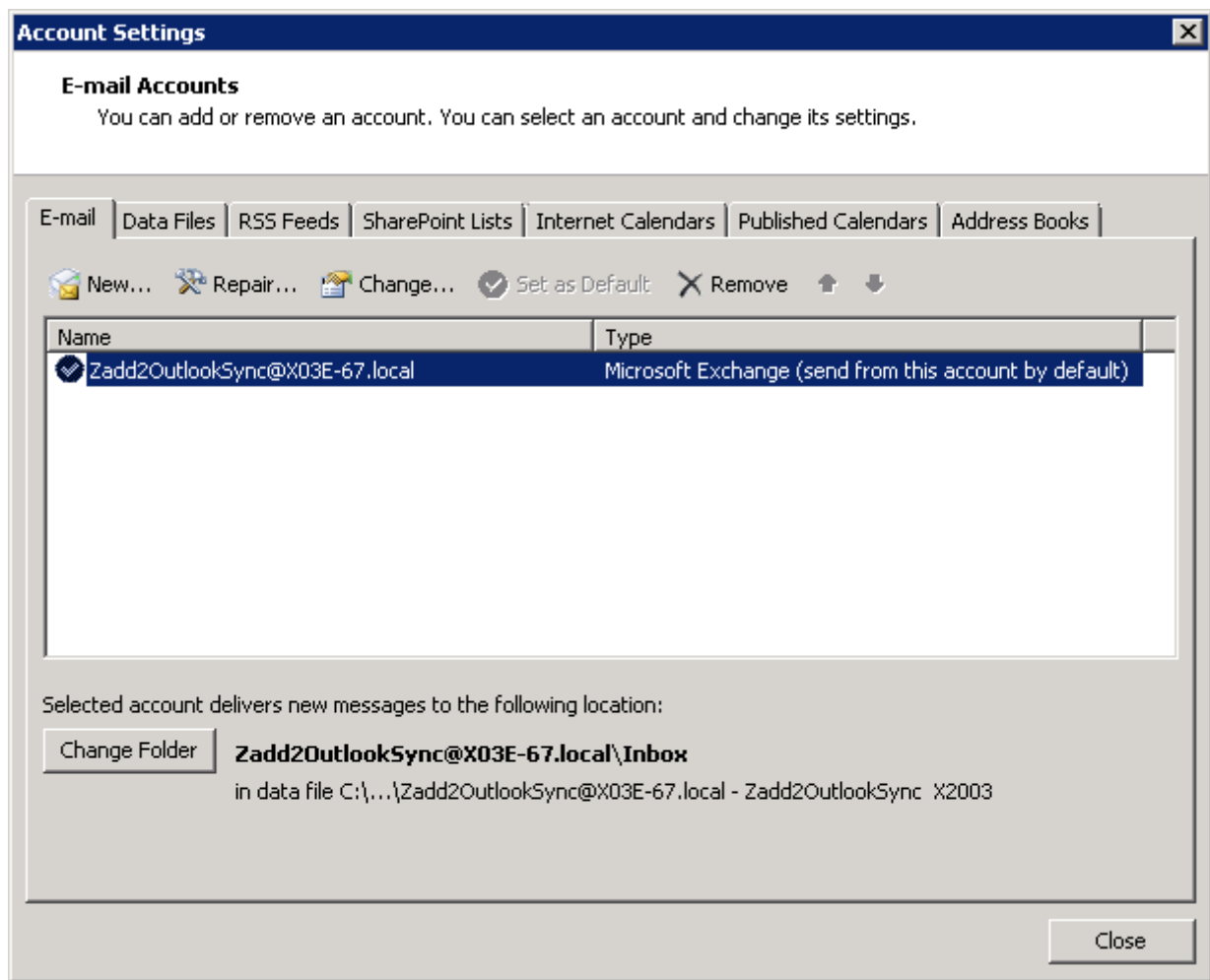
To set up the program in Outlook in offline mode, there are several steps, depending on the version of Outlook:

Outlook 2003: Tools Email accounts, Exchange Modify properties, Advanced, Cached.

Outlook 2007: Tools Email Accounts, Select the Exchange Account, Change..., More Settings..., Advanced, Cached Exchange Mode Settings and select Use Exchange Cached Mode Settings.

Outlook 2010: File, Account Settings, Account Settings, Select the Exchange Account, Change..., More Settings..., Advanced, Cached Exchange Mode Settings and select Use Exchange Cached Mode Settings.





Change Account

Server Settings
Enter the information required to connect to Microsoft Exchange or a compatible service.

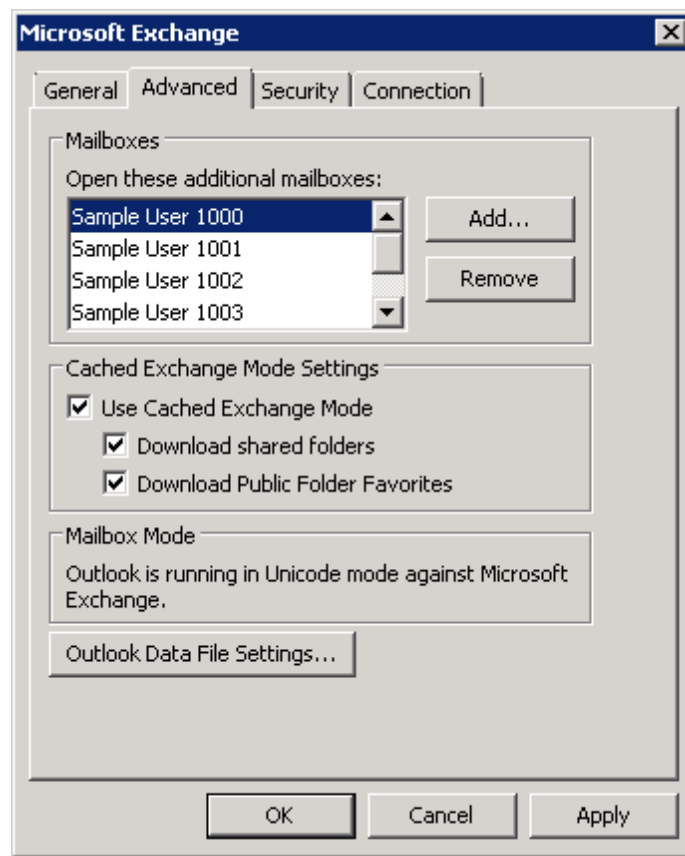
Type the server name for your account. If you don't know the server name, ask your account provider.

Server:

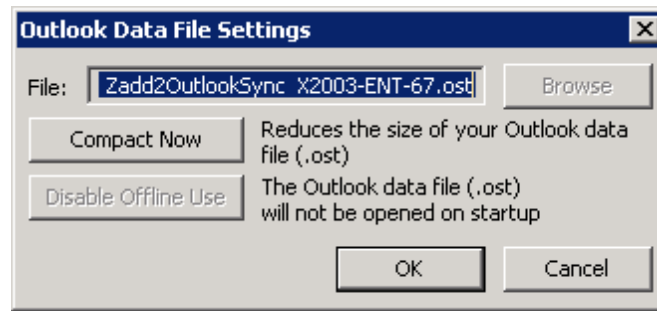
☒ Use Cached Exchange Mode

Type the user name for your account.

User Name:



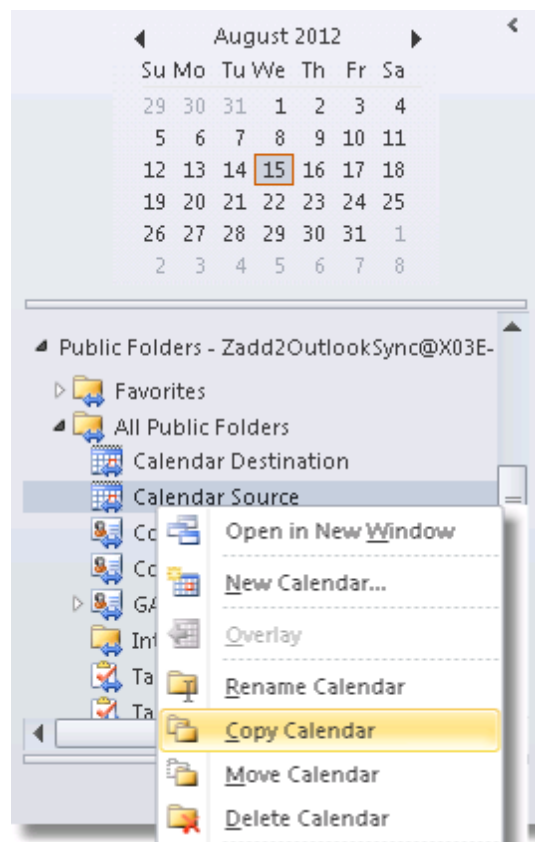
- Then be sure that the Outlook offline folder it created in Outlook (the “OST” file) is located somewhere on the local machine so it is available when truly disconnected from your network. Be sure by selecting Outlook Data File Settings and noting the location of the file it created (see picture below). If it put it on a mapped or shared drive, change the location and make a new one. You will have to restart Outlook and let the synchronization occur before you can continue to set up Add2Outlook.



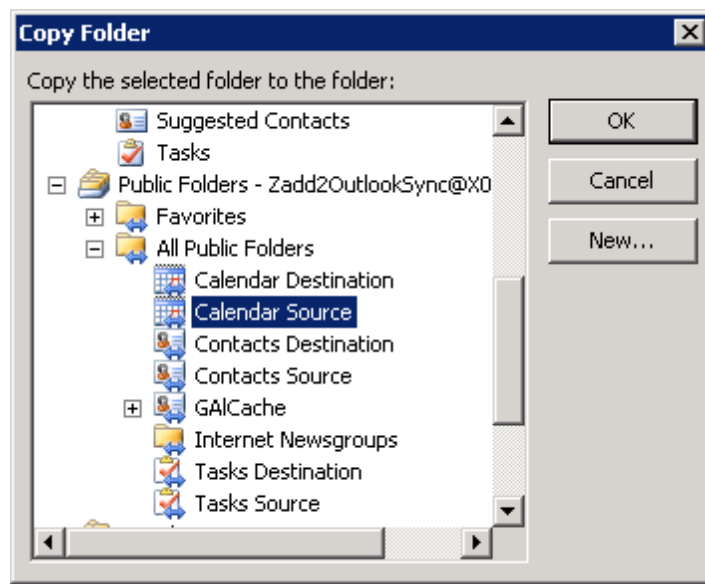
Replicating a Public Folder

***We recommend/prefer using online mode to cached mode; however, if wanting to use the cached mode follow the instructions below.**

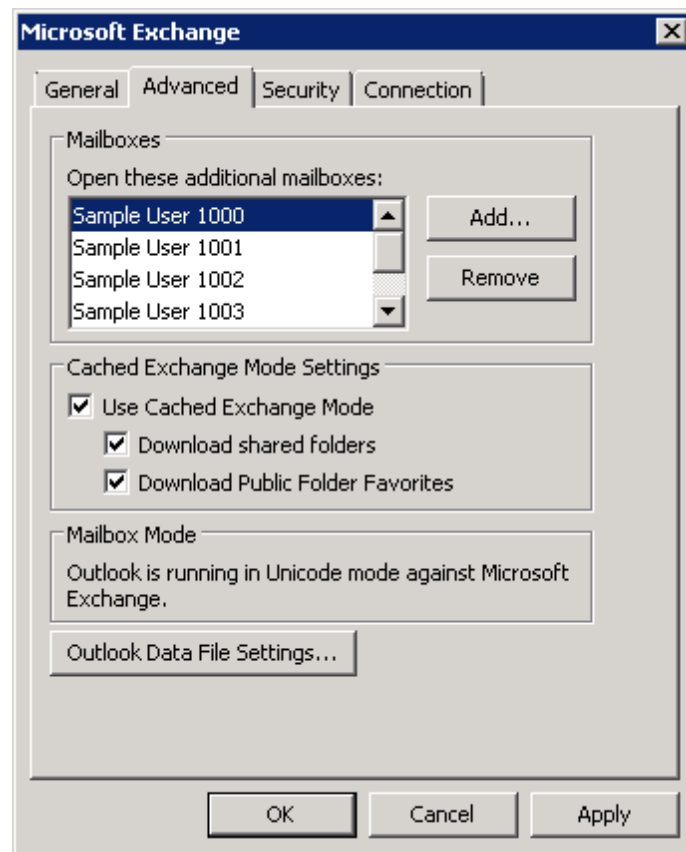
Go back into the Outlook interface and drag your Exchange-side public calendar into the Add2Outlook sync user's "Favorites" folder, under "All Public Folders", as shown below.



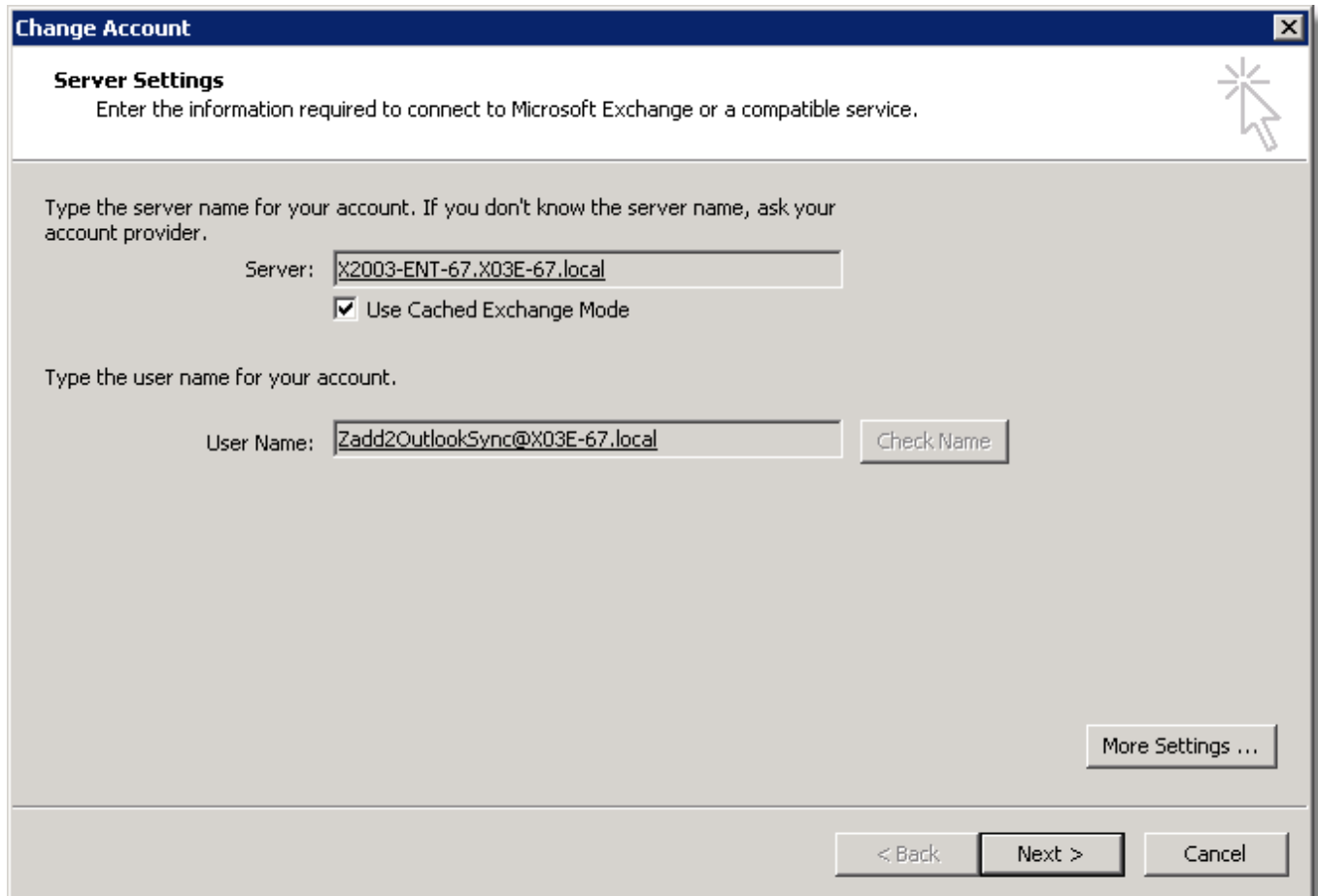
1. Right click on the folder under **All Public Folders**, click **Copy Calendar**.



2. Select the folder and click **OK**.



3. Click **File, Account Settings**, select the file, **Change..., More Settings..., Advanced**. When you reach the menu above, check **Use Cached Exchange Mode, Download shared folders** and **Download Public Folder Favorites** then click **Apply** then **OK**.



Change Account

Server Settings
Enter the information required to connect to Microsoft Exchange or a compatible service.

Type the server name for your account. If you don't know the server name, ask your account provider.

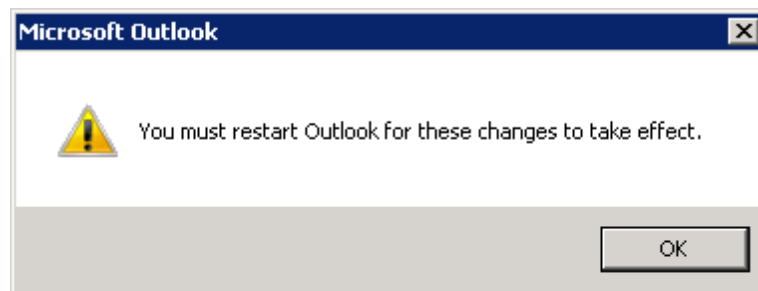
Server:

☒ Use Cached Exchange Mode

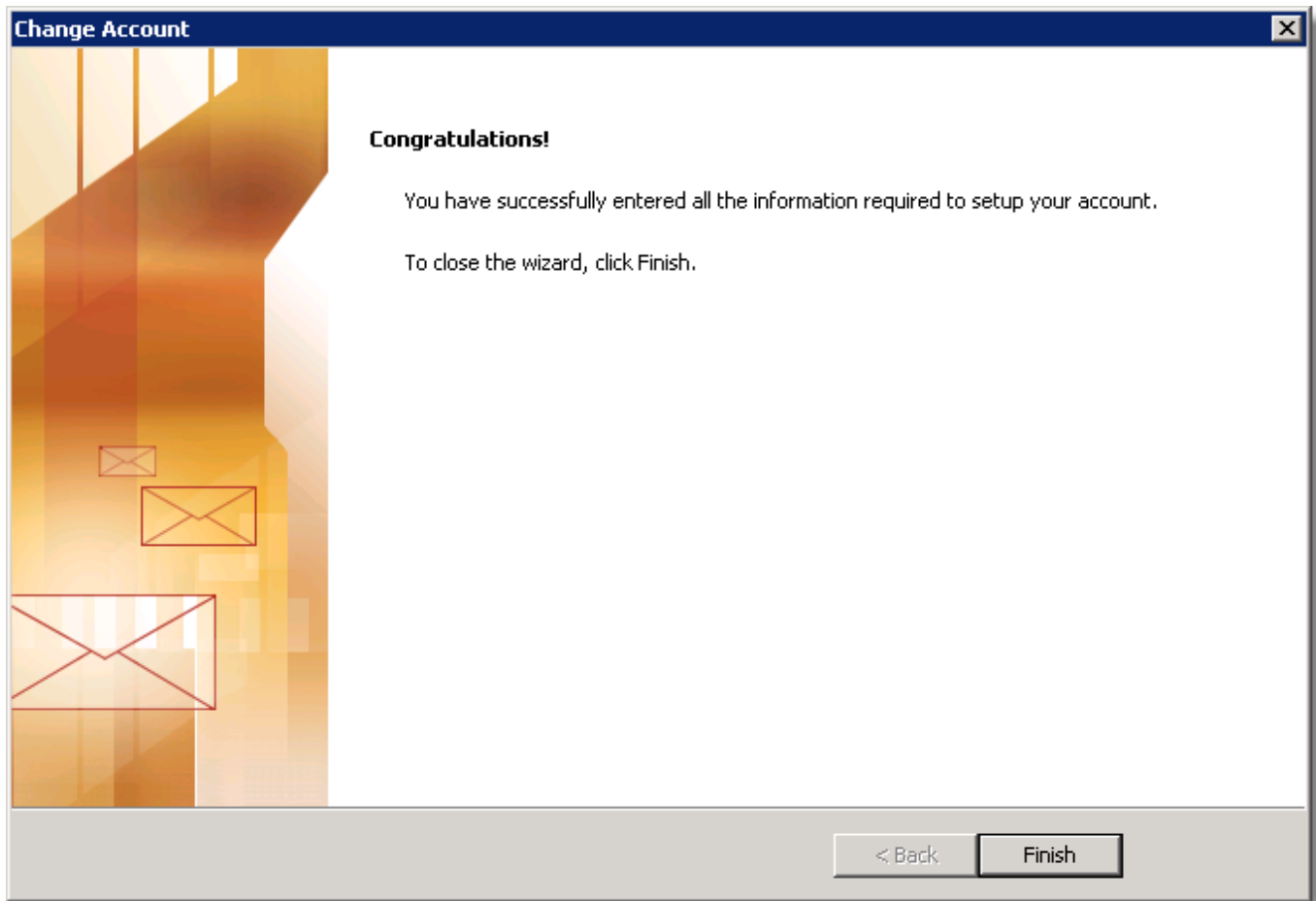
Type the user name for your account.

User Name:

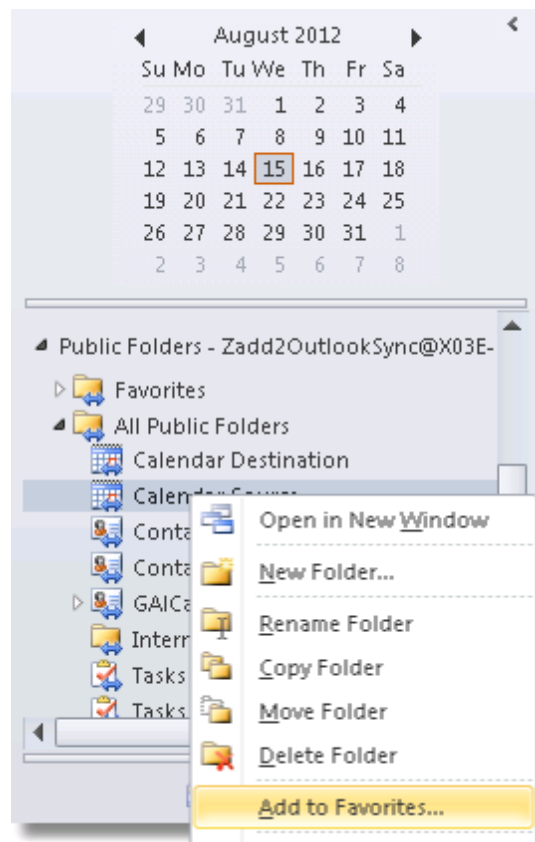
4. Click **Next >**.



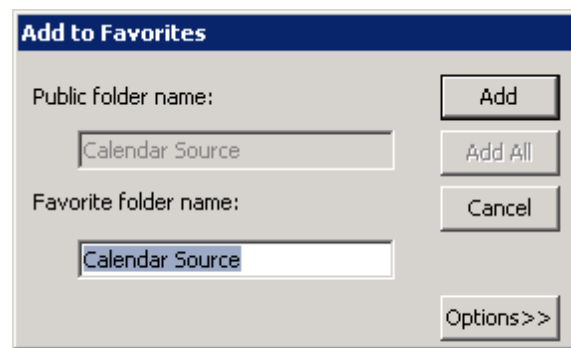
5. A screen will pop up prompting you to restart Outlook. Do so and then go back into the program.



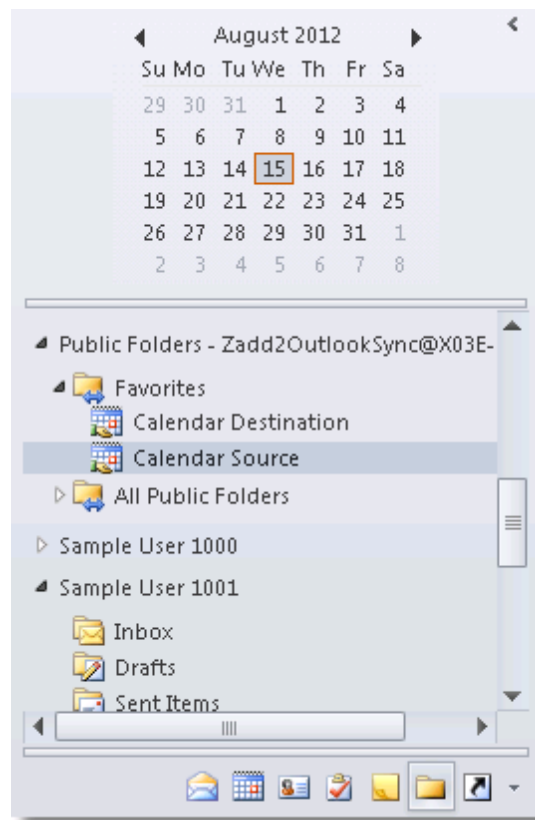
6. Follow the prompts and click ***Finish***.



7. Right click the folder and select **Add to Favorites...**



8. Click **Add**.



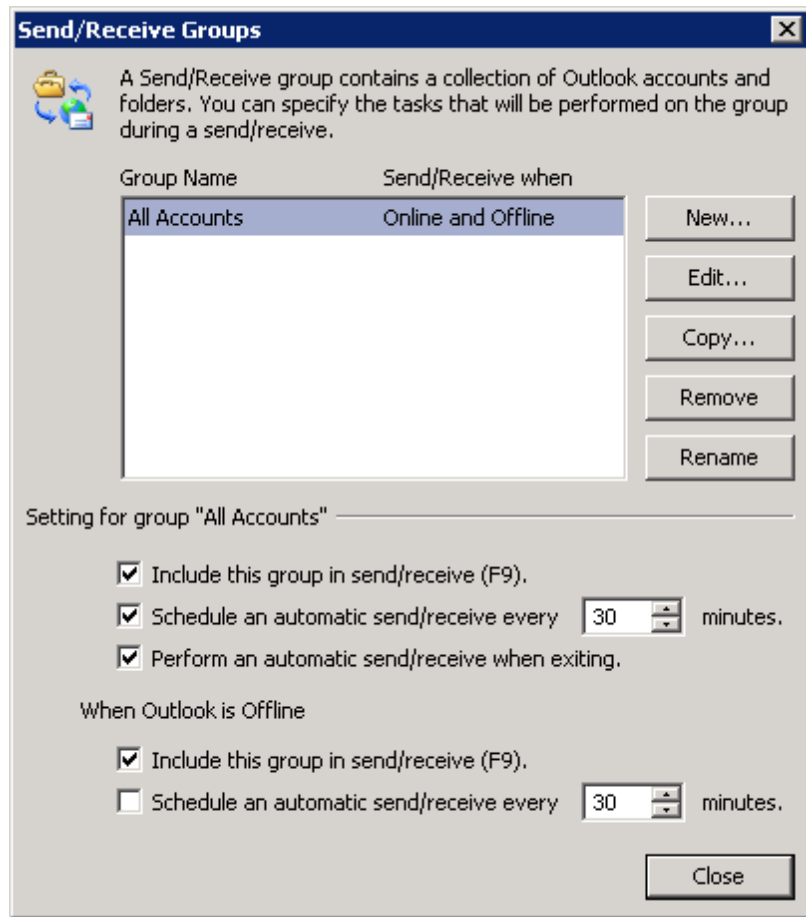
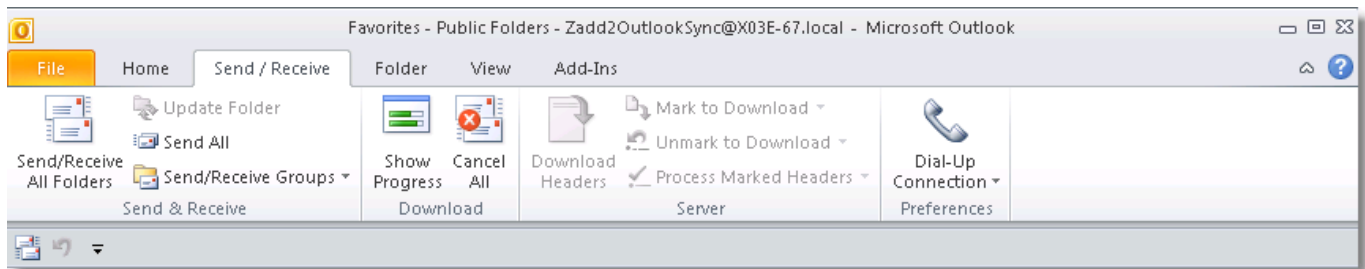
After you click Add, it will then be in the Favorites folder.

IMPORTANT! Next, you must Define Send/Receive Group and do your first synchronization before you can set up an Add2Outlook relationship! Go into Outlook's Tools option and depending on your Outlook version either Synchronize Settings or Send/Receive Settings. You will have to set the offline folder settings for each folder. This step determines if the folder is available offline and fills it up with the associated public side items. This **MUST** be done before setting up the Com Add-in in the next step so you can set up the source or destination folders in Add2Outlook!

Outlook 2003: Tools, Send/Receive, Edit.

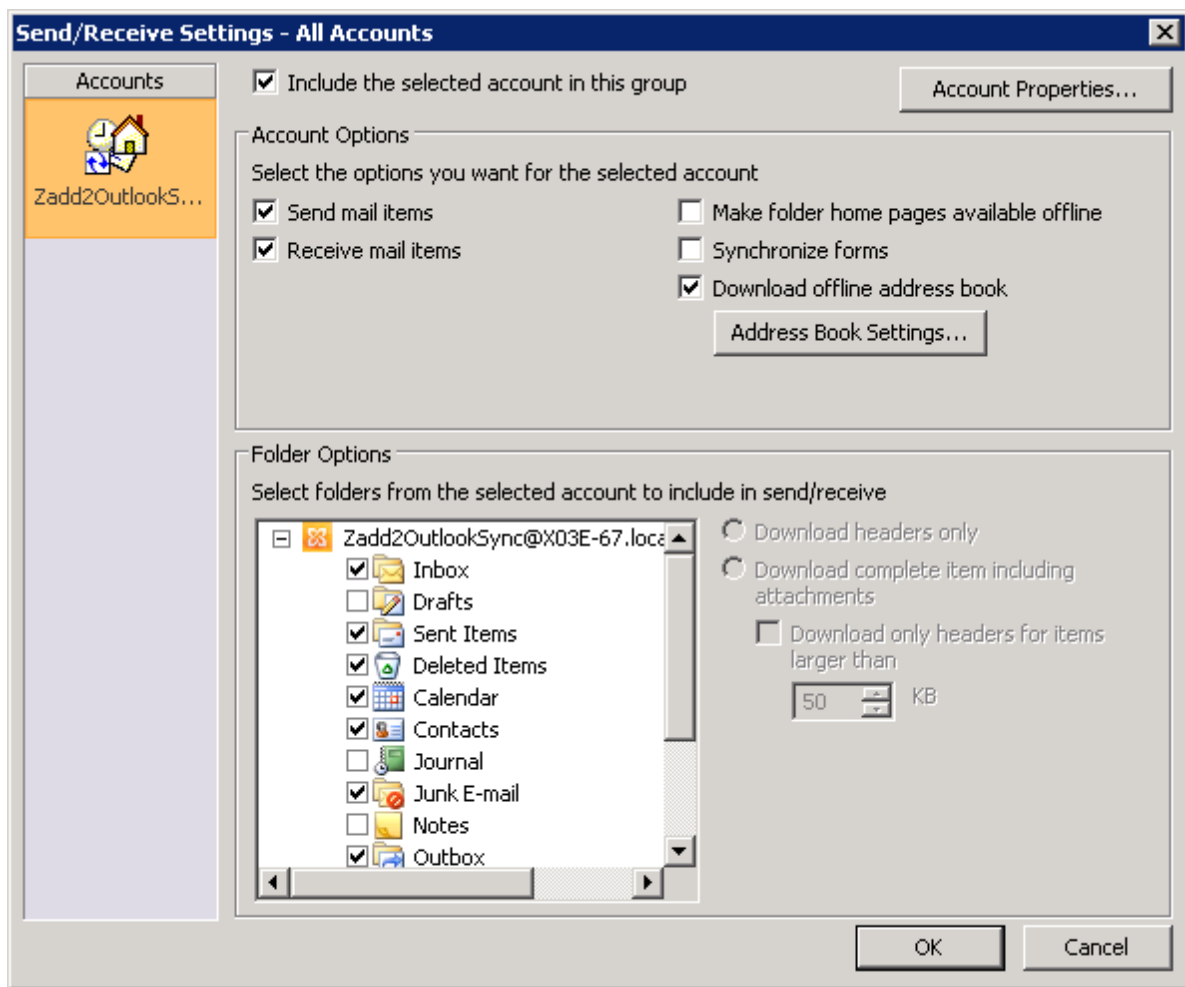
Outlook 2007: Tools, Send/Receive, Edit Send/Receive Groups.

Outlook 2010: Send/Receive, Send/Receive Groups, Define Send/Receive Groups.



Tip: Notice the selected option in the above picture. We recommend setting the automatic send/receive when exiting option for the offline setting option to synchronize the Outlook offline folders on exit. This forces a mobile user to always work with current data when offline!

- Press **Edit...** and select all the server-side mailbox and Favorite folders desired offline. For our purposes, select the calendar under the Favorites.
- You must now synchronize the online folders with the offline folders (see picture below). In Outlook, Select **Tools**, **Send/Receive**, and **All Accounts** or just the account you set up, click **OK**.



You should now be ready for offline use. Close Outlook and then wait a few seconds, then reopen.

To test for offline availability of the Exchange side folders while connected to the LAN, make sure the program is configured as specified above. Then, select Synchronize all folders. Then disconnect from the LAN, (and it should synchronize again if set up as recommended). Reboot and log back into the computer, then either disconnect from the LAN or go into Outlook by selecting the Offline Mode when prompted (see above).

- To Test, while offline, drill down on the public folder/favorites folder and select the desired folder.
- Right click the Favorite's calendar folder and go to the **Properties**.

The Synchronization tab should have a time date for last synchronization. If this is the case, then you are ready for offline use. Next, you need to set up the relationship to or from this offline folder. If not, repeat the steps above until it shows a synchronization date and time. Then continue. If not, then go back and make sure your settings are specified as above. If all else fails, ask for help.

Once this is complete, continue making a relationship.

Now when setting up the relationship, set the source or destination folder to the calendar in the All Public Folder Favorites.

The program is now set up to work online or offline and is enabled for Outlook Synchronization.

3.6 Profiles

To install the program to another Outlook profile for the same user of the same machine (more than one Outlook profile per user on the same machine):

To configure the program for another user of the same machine, it is recommended that you log on to the machine as the new user, open the new profile, and Add2Outlook will automatically prompt to activate. This profile will have its own activation code, its own relationships and sync on the settings provided for that profile. Do this by the normal way of Adding Relationships. The program will now be activated for the new relationship immediately based on that profile, and will not replicate the other user until that profile is opened. Add2Outlook will only sync those relationships added for that open profile.

Tip: Although you can have two profiles with a different calendar relationship for replication, it is not recommended that the same source OR destination be used for both relationships for both profiles. It would be better to add the mailbox or relationship to one profile and set up another relationship within the first profile.

To install the program to the same Outlook profile on another machine:

This is not recommended, or advisable. There is usually no need for this configuration, but it is possible. In certain circumstances, when the program is running on more than one machine for the same user with the same relationship set up on both machines, it can cause a looping effect between machines which can increase times of replication.

To have replication occur for a user no matter what machine they are using, we recommend using our server-side solution Add2Exchange Standard or Enterprise located at <http://www.diditbetter.com/products.aspx>.

3.7 Folder Permissions

Because Add2Outlook uses special custom fields, you or the user you are installing this for must have "Owner" permissions to both the source and destination folders in order to add the required fields to the folder(s). By default, if any user creates a calendar folder through Outlook, they have explicit ownership to that folder, but the replication service account may not have permissions. If the folder to replicate is within the mailbox of the user, you must still give the replication service account explicit OWNER permissions to the folder as shown below.

Right click the folder to replicate to or from, go to Properties and add the replicating user account as OWNER. If you have many relationships to many users and have correctly decided to install the software on a dedicated workstation, then you would create a replication Service account. In our examples below, we have shown you the configuration options as if you created an Add2Outlook Replication Service Account.

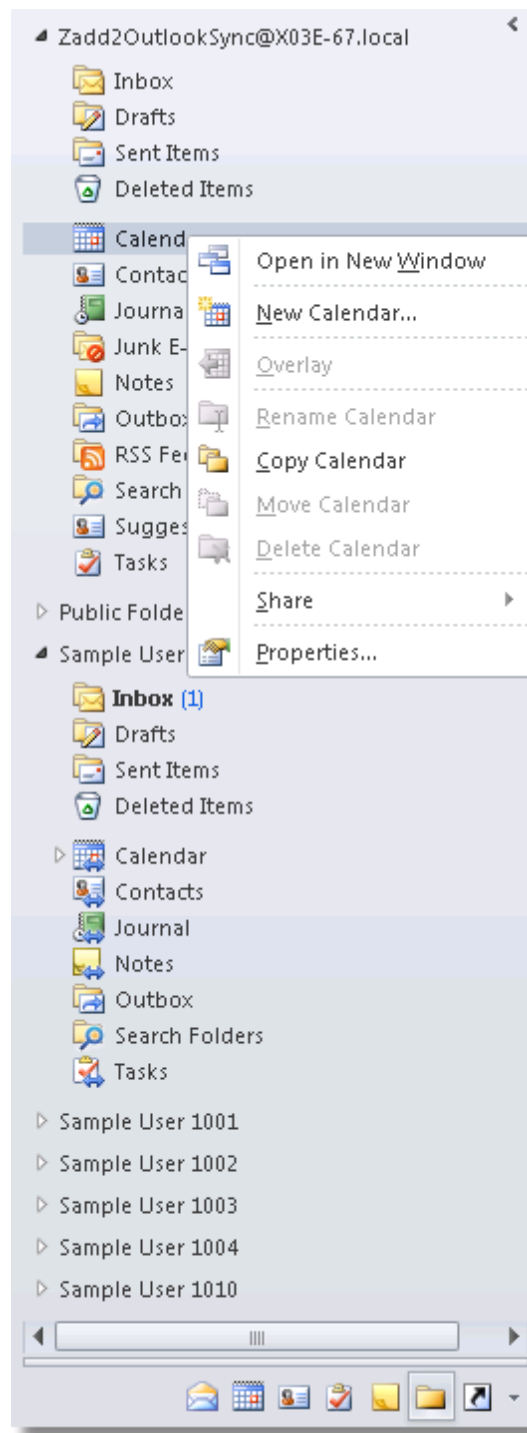
If the program is being installed with a source or destination folder in the Exchange public folder system, the replication user who installs the program must have the security level of "Owner" so the custom fields can be added in the source folder and all other public folders Add2Outlook will replicate to or from. After a successful install and replication, the user fields are created in the folders, and subsequent users who are to be set up on the same folder do not have to be an Owner to install and configure. Subsequent users must have at least Editor to Publishing Editor permissions (with Publishing Editor as the most common). Regardless, everyone who uses Add2Outlook has to be an owner of their own server-side mailbox or

PST.

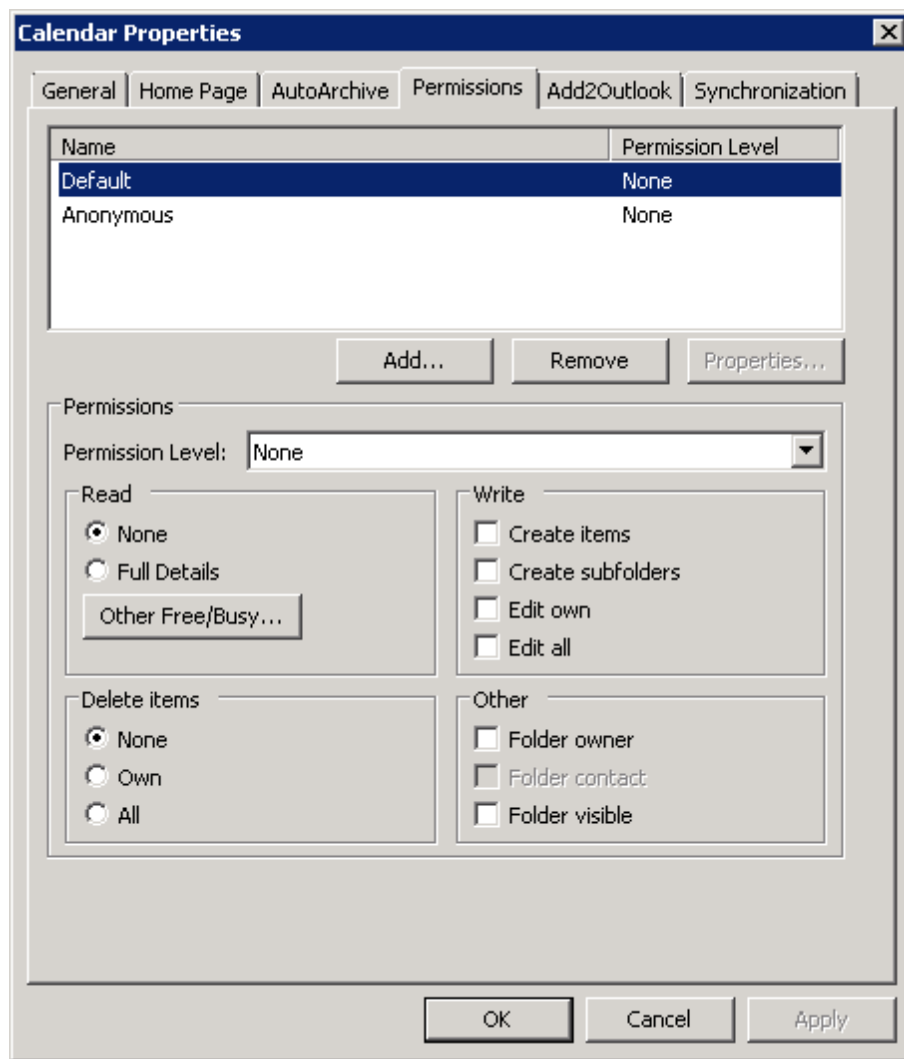
Let's make sure your replication user has the appropriate permissions:

If you created a new folder through Outlook, you have explicit client Owner status for that folder and you can proceed. To test to see if you have the appropriate permissions, log on as the user, open Outlook and right click on the source and destination folders. Go to the Properties of the folder and if there is a Permissions tab, the user may or may not be an Owner. Add the service account users DOMAIN account to the Permissions tab and give Owner status. Do this for any source and destination folder. Then the install and setup can proceed.

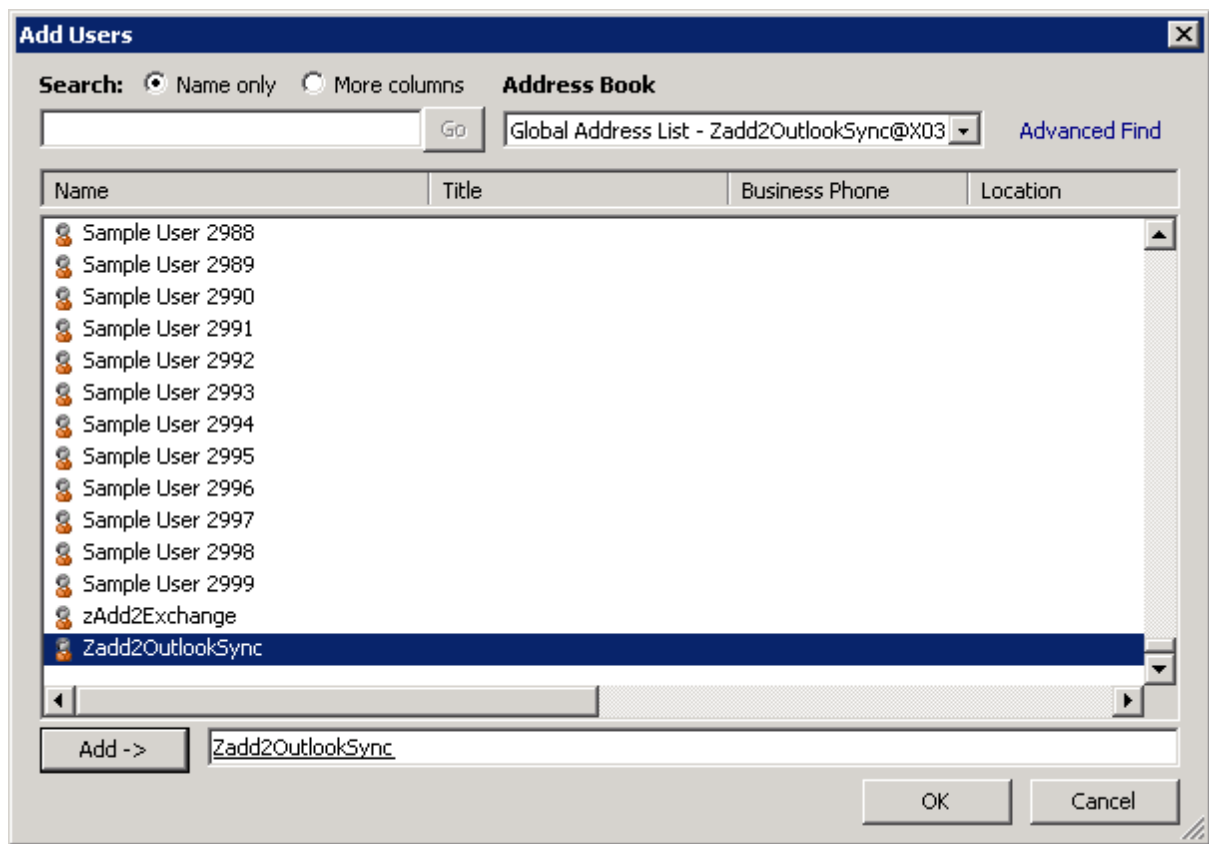
Permissions:



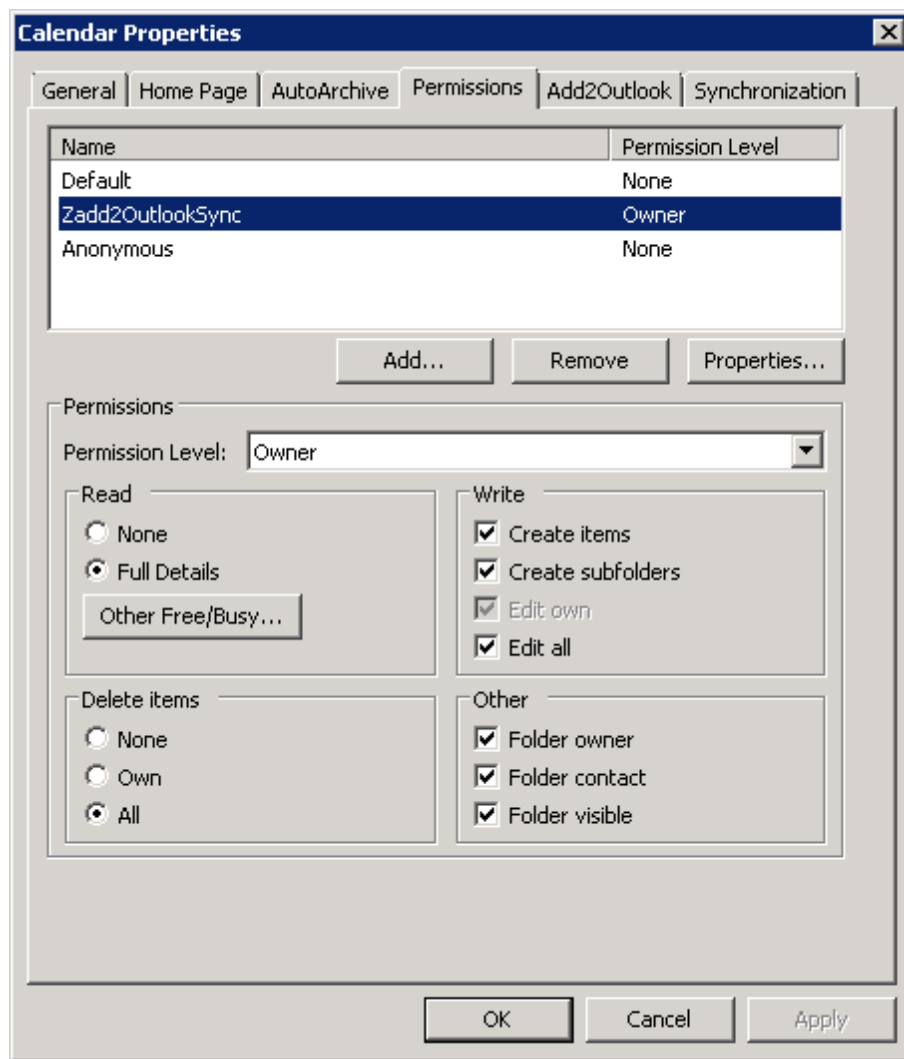
1. Right click **Calendar** and select **Properties...**



2. Click the **Permissions** tab and select **Add...**



3. Pick the Add2Outlook Service Account, click **Add - >** and then press **OK**.



4. Then select the Service account name from the list and use the Permissions Level drop down to select Owner and Folder Contact. Press **Apply** then **OK**.

Tip: If these permissions are made during the creation, you may have to close Outlook and reopen it again to continue.

Public Folder Permissions: In Outlook, you can drill down to the public folders and right click the source or destination folder. If you have a Permissions tab, do the same procedure as above. If you do not have the Permissions tab, you may be able to do this procedure from an account which has privileges (the creator of the folder usually does) or in Exchange System Manager or if hosted, from your Exchange provider's web based control panel if they provide one.

If you host your own Exchange Server, you can give permissions as noted in the section below the next:

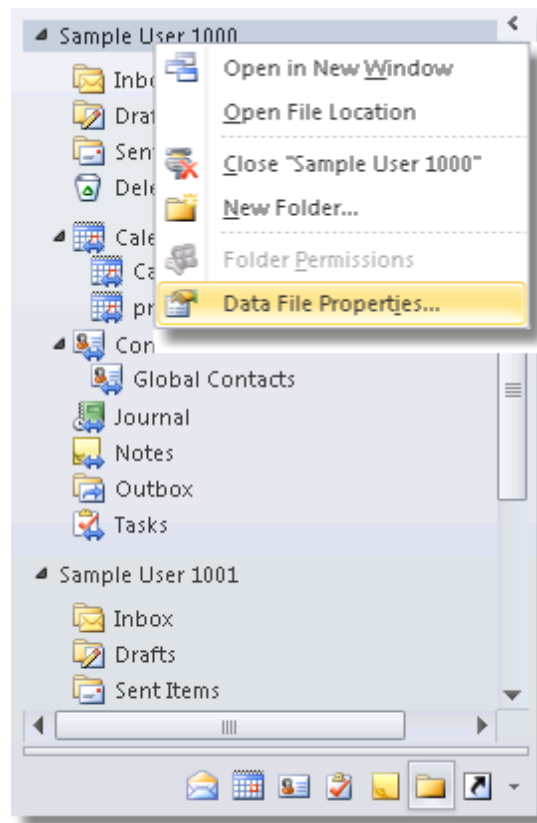
If you don't host your own exchange server, and you are in hosted mode, the immediately following procedures to give folder permissions:

Optimal configuration for both online and cached mode to maintain a high level of security:

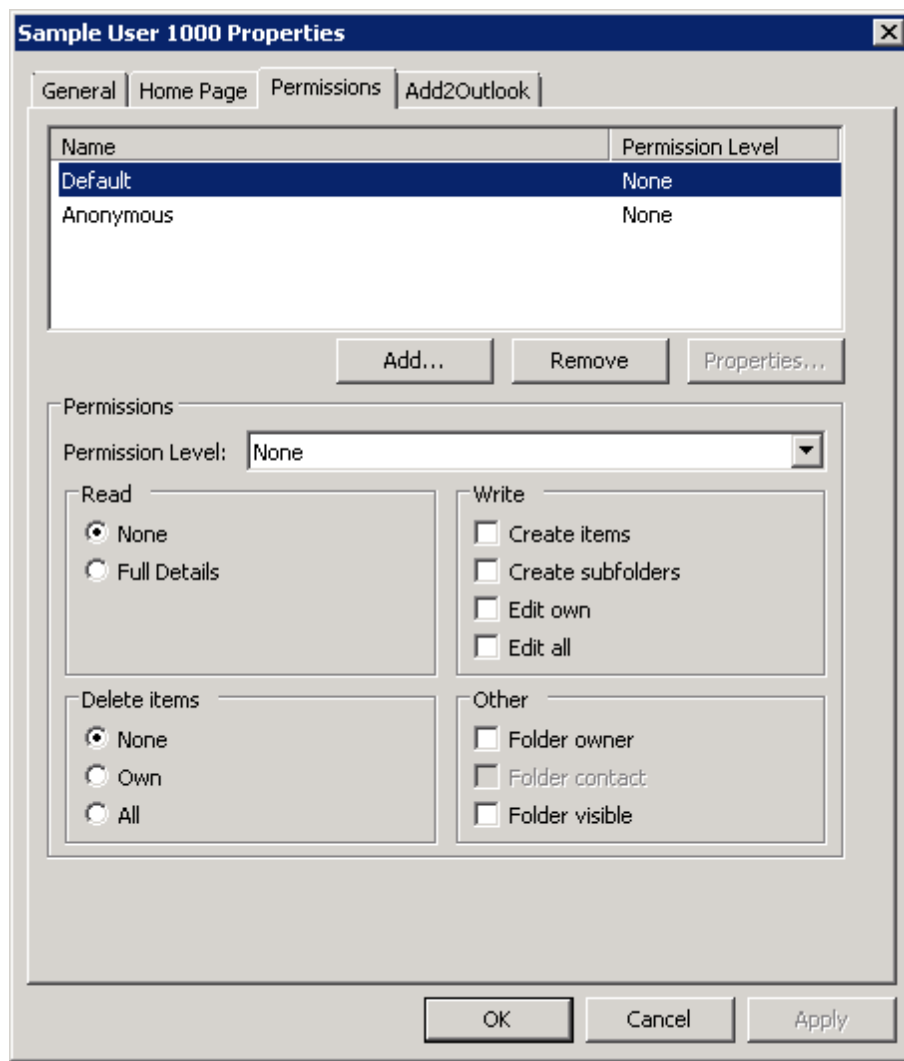
The 2003 and 2007 and 2010 instructions are optional instructions if you host your own exchange or have access to your Exchange Server.

Give full mailbox access in your hosted web portal to the zAdd2Outlook service account or the account you are replicating with and for each user you are replicating to or from.

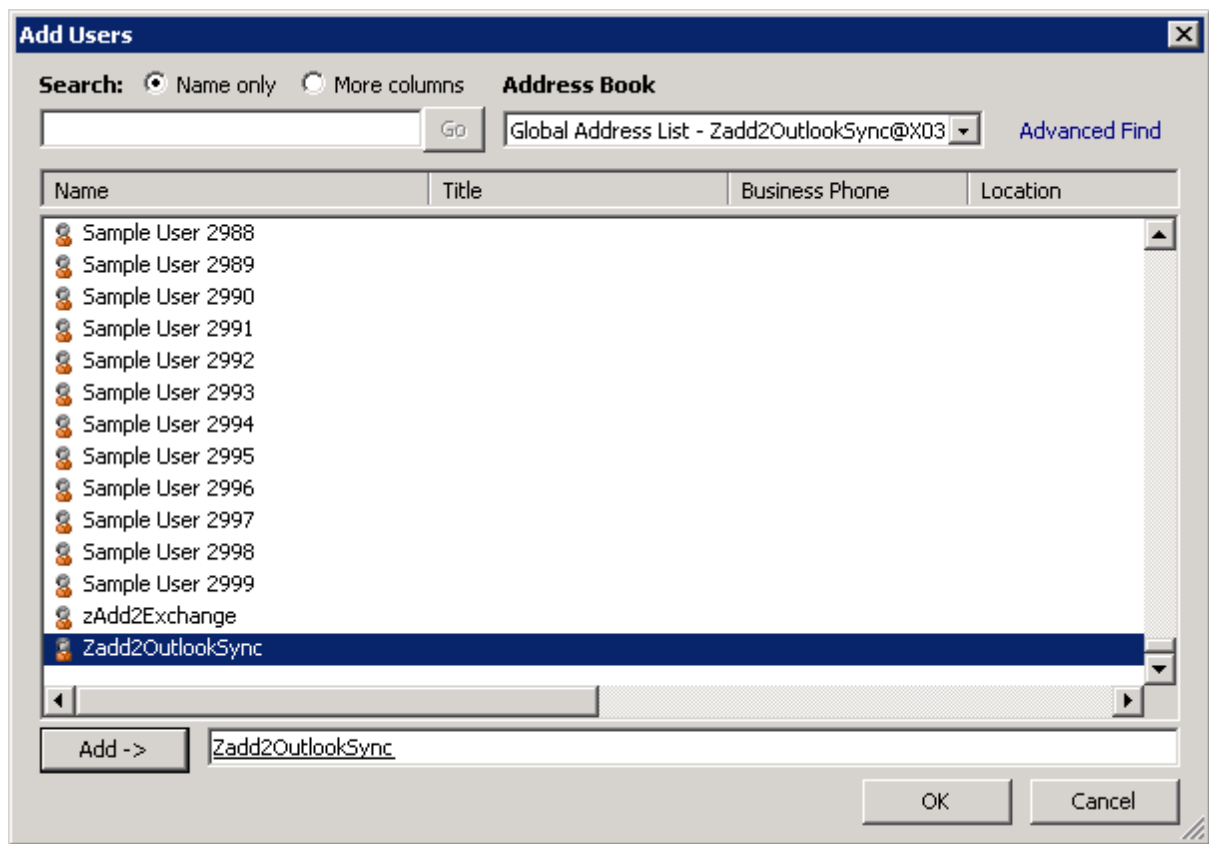
1. Open Outlook, preferably in online mode.



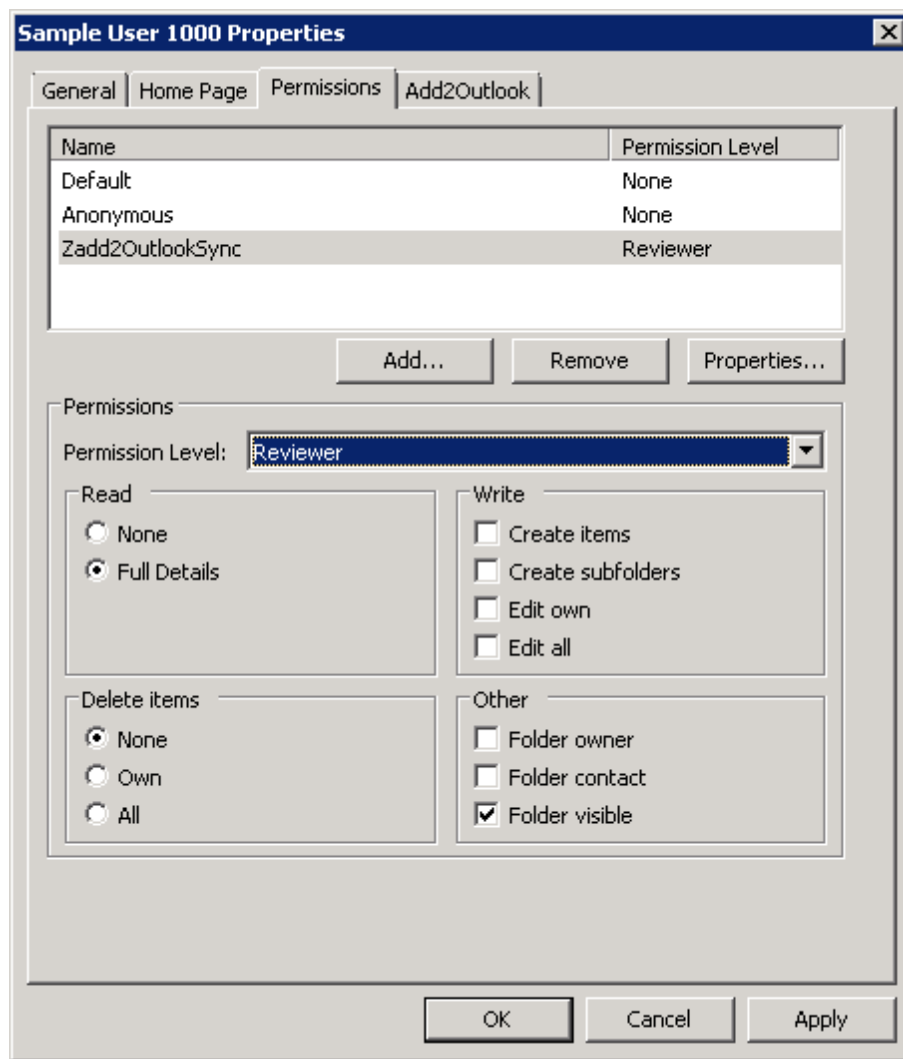
2. Right click the user **mailbox** and select **Data File Properties...**



3. Add the users mailboxes. Click the **Permissions** tab then click **Add...**



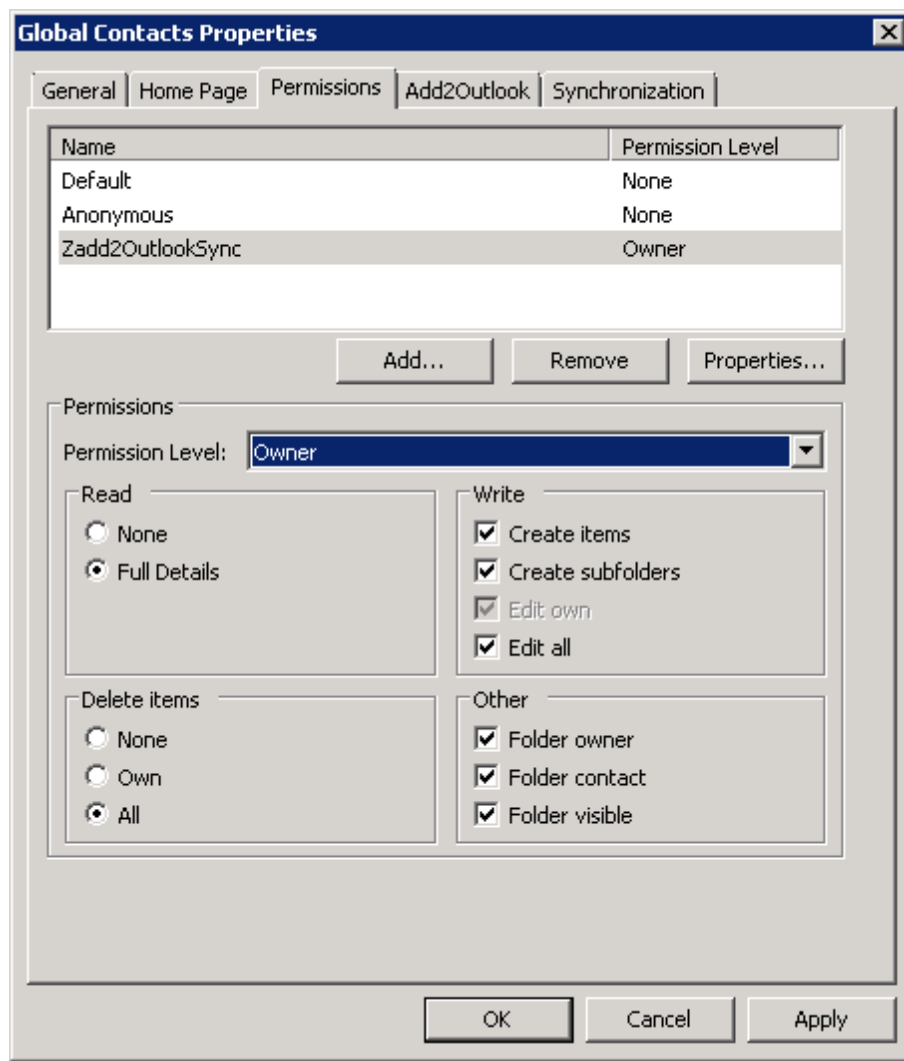
4. Scroll down and select the account. Click **Add - >** then **OK**.



5. Give Reviewer permissions to the service account (zadd2Outlook) to the mailbox – do not change the service account permissions on the service account mailbox. Click **Permissions** and add the service account as **Reviewer**. Click **Apply** then **OK**.

6. Give Reviewer permissions in the same way to any folders in-between the mailbox and the ultimate source or destination folder where the items are going to be replicated to or from. In our example the ultimate source/destination folder is the Global Contacts folder under the Contacts folder. So in our example we will give Reviewer status to the Mailbox, the Contacts and then to the Global Contacts, giving owner permissions. So in recap, each folder from the mailbox to the ultimate destination folder will have Reviewer Status and the ultimate source or destination folder will get Owner status to the replication service account.

Note: By the term "any folders in-between" the mailbox and the ultimate source or destination folder, exclude folders such as Inbox, Drafts, Sent Items, Deleted Items, etc. You should only be concerned with the folders you are replicating to or from.



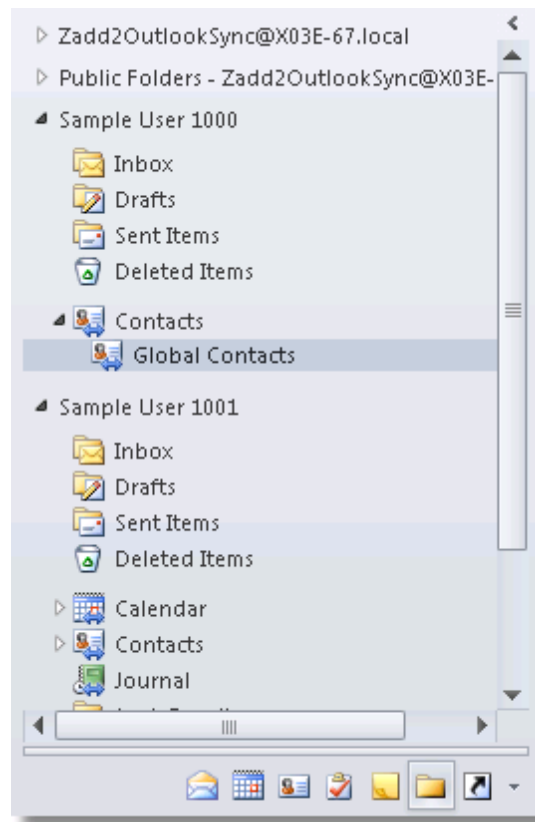
7. Be sure to give Owner permissions to the ultimate source or destination folder. Click **Apply** then **OK**.
8. Then do this for all users you are replicating to or from; in our example we did this for Sample User 1000 and Sample User 1001.

Check all permissions for each source or destination folder in each mailbox before the next step

Close Outlook.

Next, perhaps with the help of your administrator, go back to the web portal and remove full mailbox permissions to the Service account for every mailbox you gave it to prior.

Then open Outlook and only the folders we need to see are visible and with the proper permissions; as you can see the number of folders are decreased under Sample User 1000 versus when it was assigned full mailbox permissions in order to increase the level of security.



***This change may not be immediate and may take a moment for the hosting provider to replicate permissions.**

Doing this process above will limit what information this account has access to, and maintains a higher level of security.*

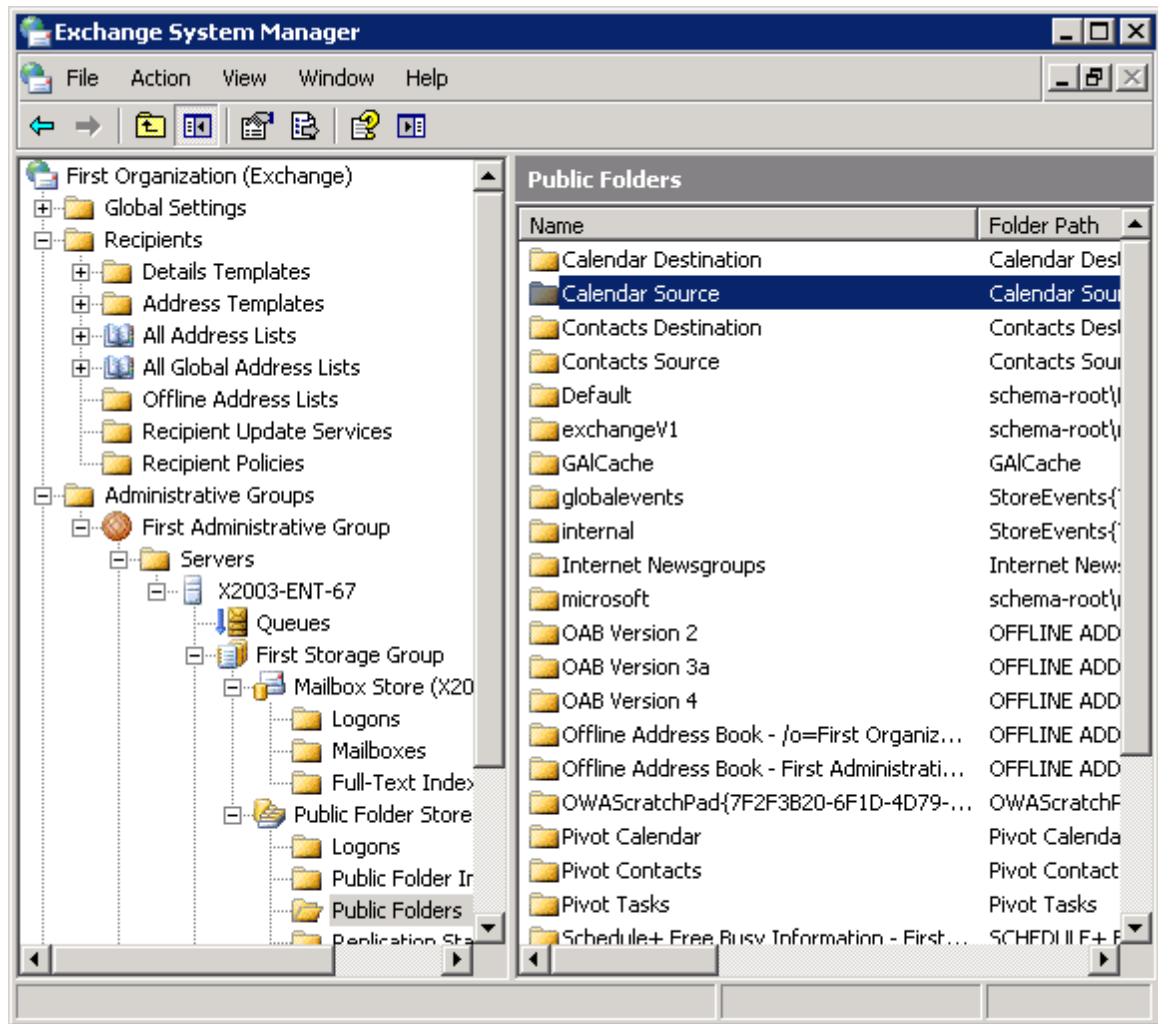
Please go to the next section.

On Premise Exchange

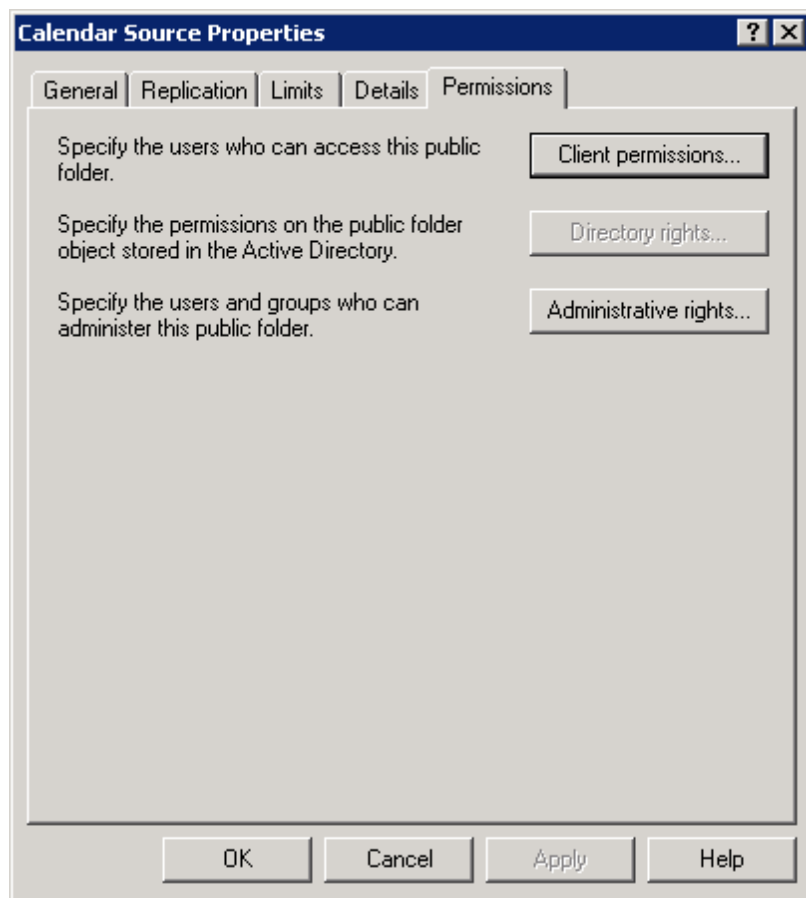
If you host your own Exchange Server, you can give permissions as noted in the following section below.

TIP: If you have access to your exchange server, please consider the server based product. The server based product does not require it to be installed on the server, it could be installed on the server, a VM, a utility server without Outlook on it or a dedicated workstation. See this section: [Is Add2Outlook Right For You?](#)

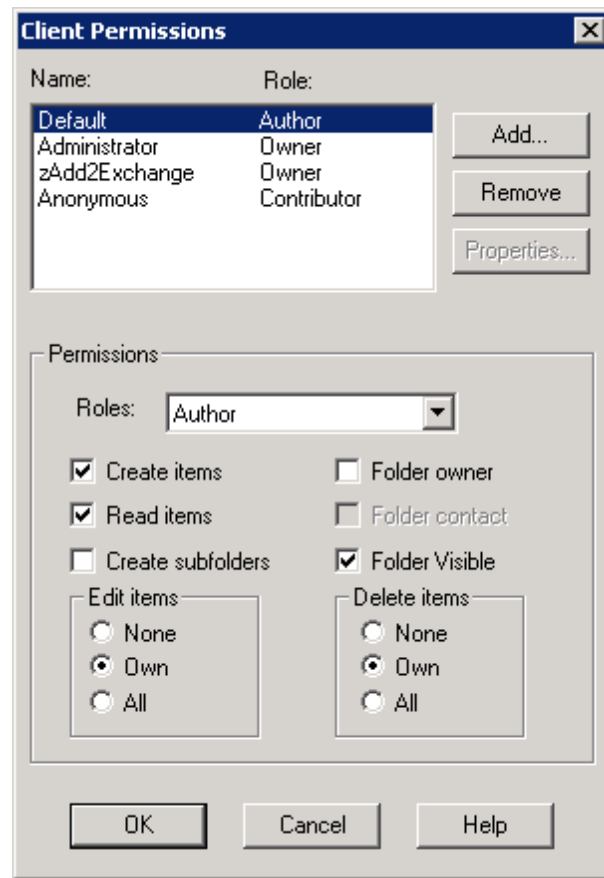
Exchange 2003: Open the *Exchange System Manager* and drill down to your *public folder*.



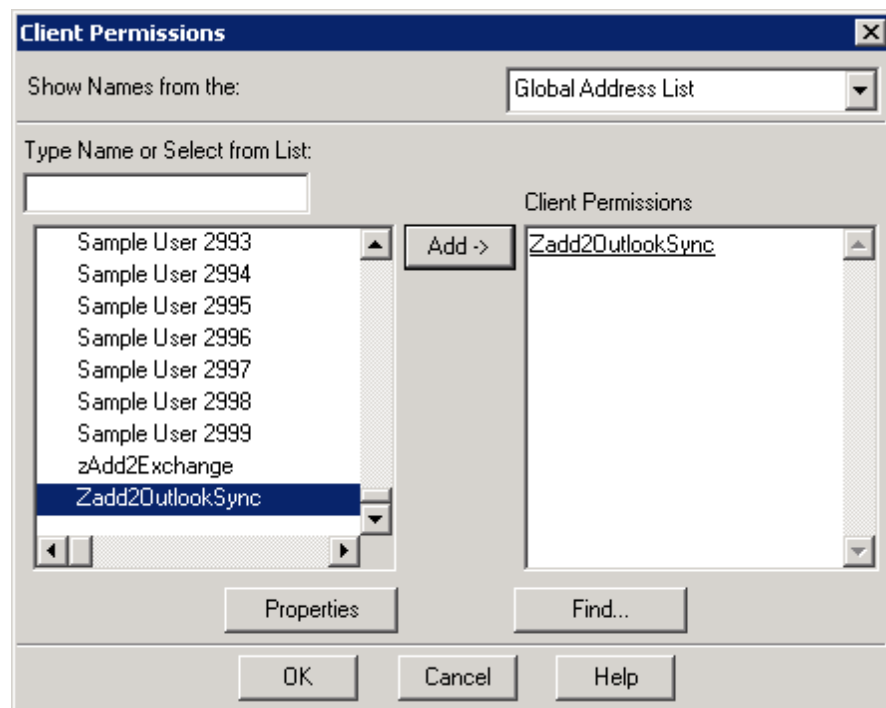
1. Right click **Calendar Source** then click **Properties**.



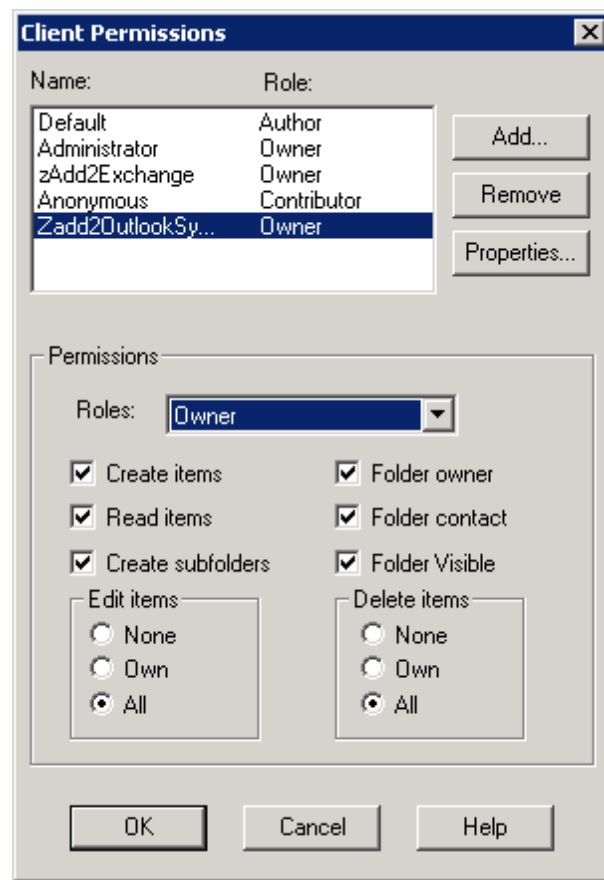
2. Click the **Permissions** tab on the top of the page and then click **Client permissions...**



3. Click **Add...** to select the user.



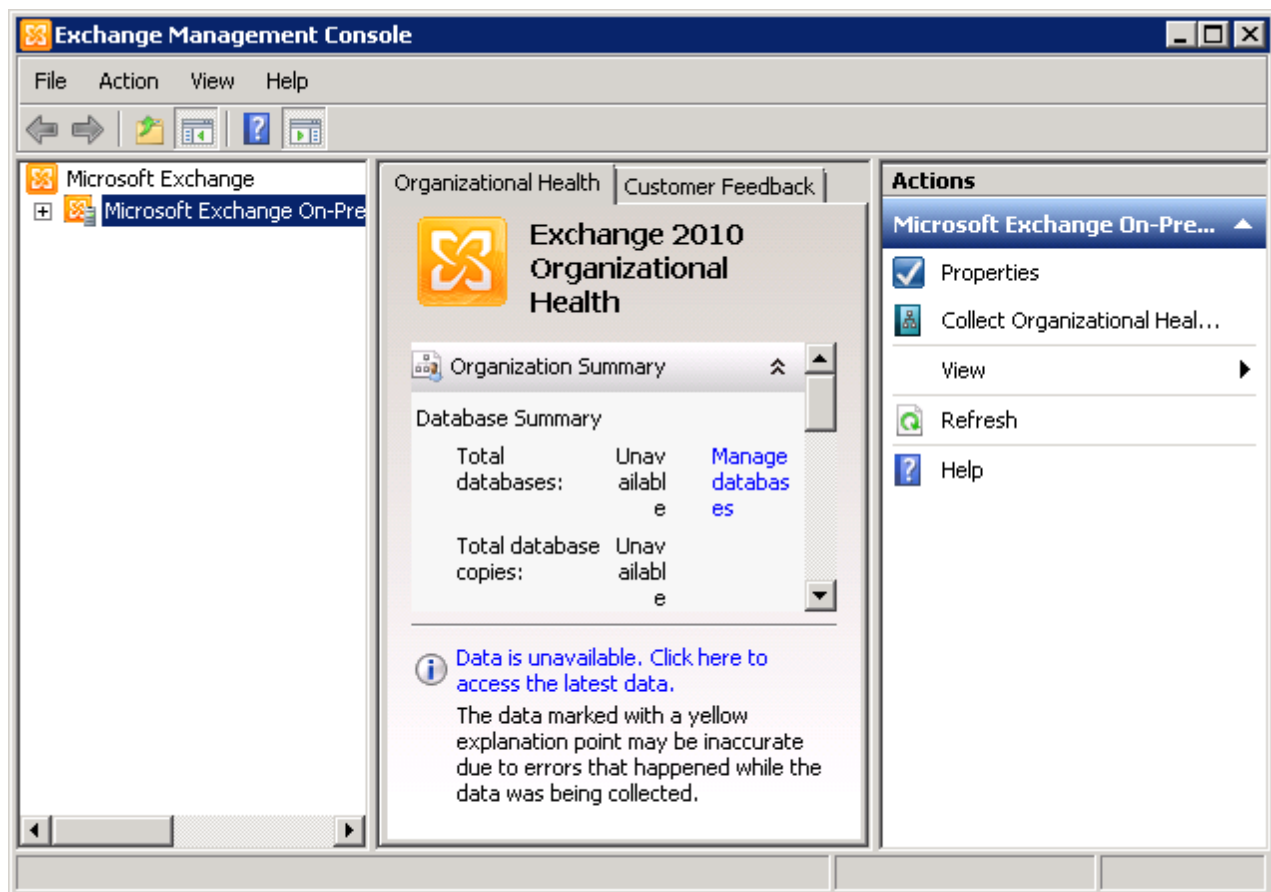
4. Select the user and click **Add - >** then **OK**.



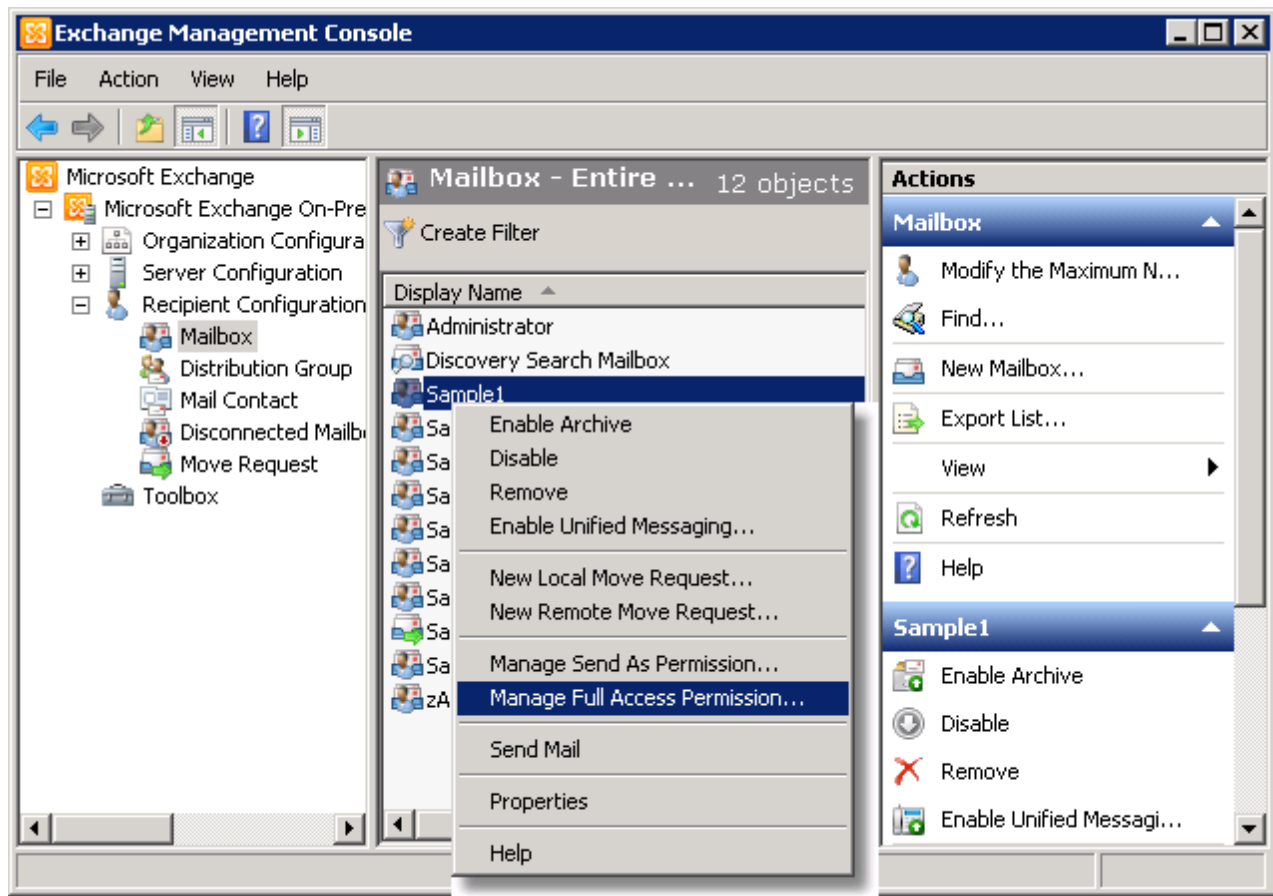
5. Assign the user ***Owner permissions*** and click ***OK***.

Once this has been done for all private mailboxes and public folders you will be replicating to or from, then folder permissions have been granted and you can proceed to the next section.

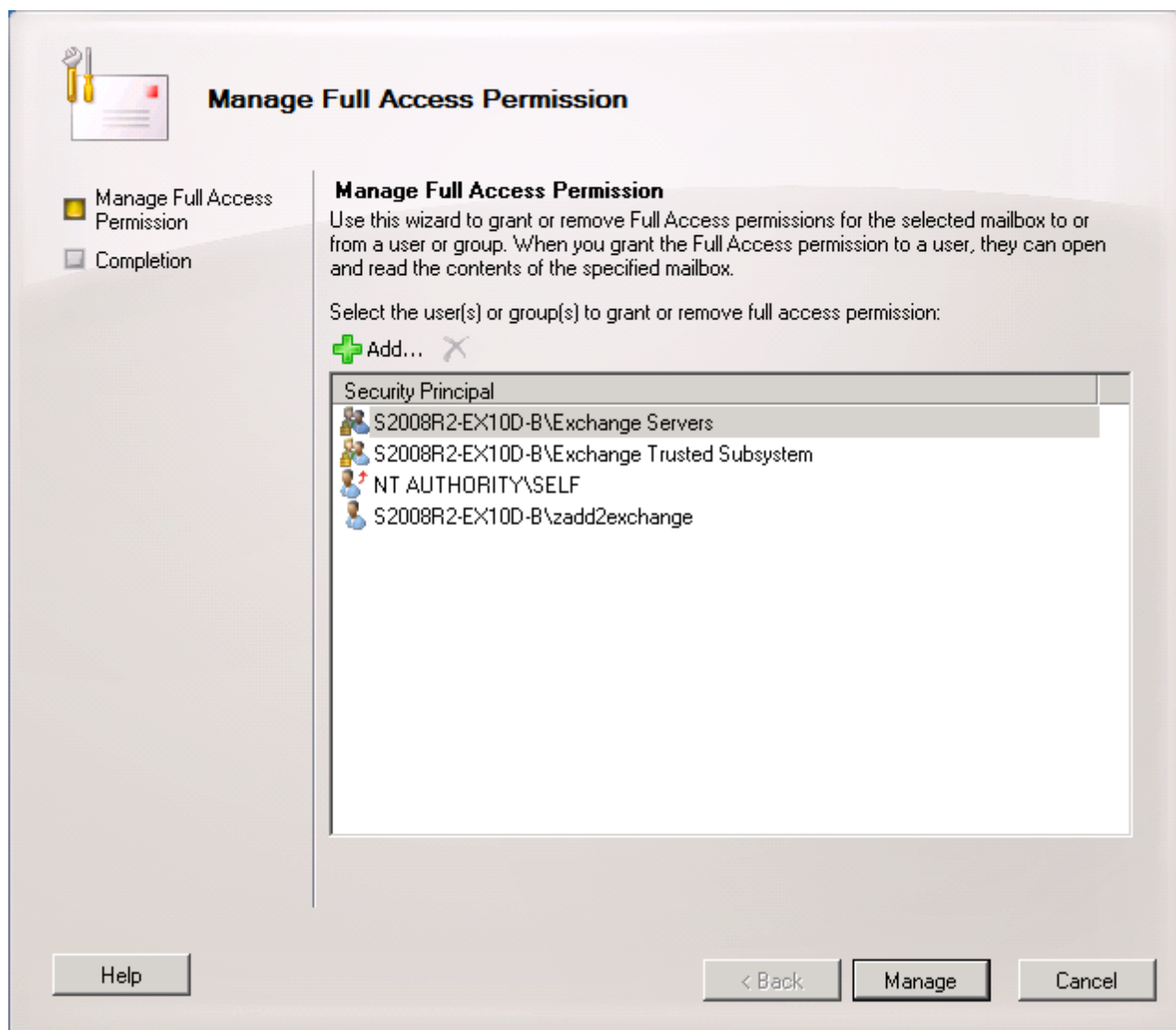
Exchange 2007 and 2010: Open the Exchange Management Console.



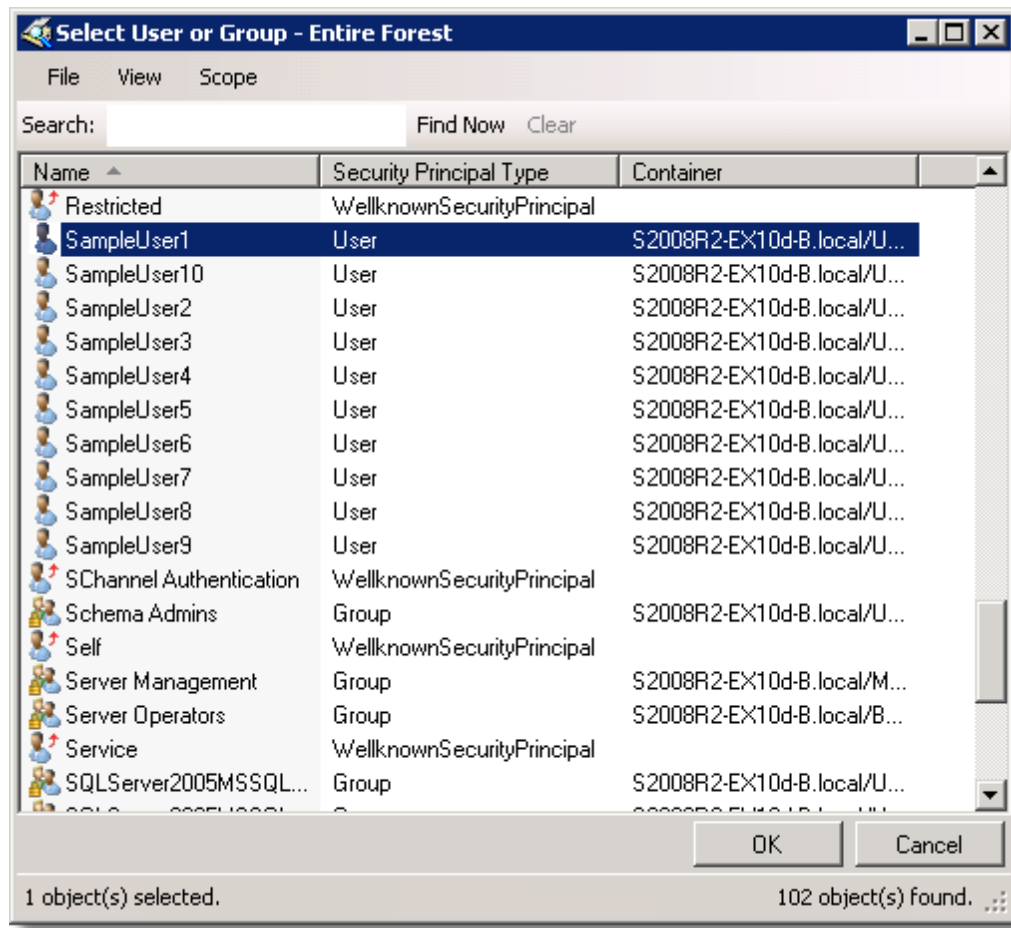
Giving Full Mailbox Permissions:



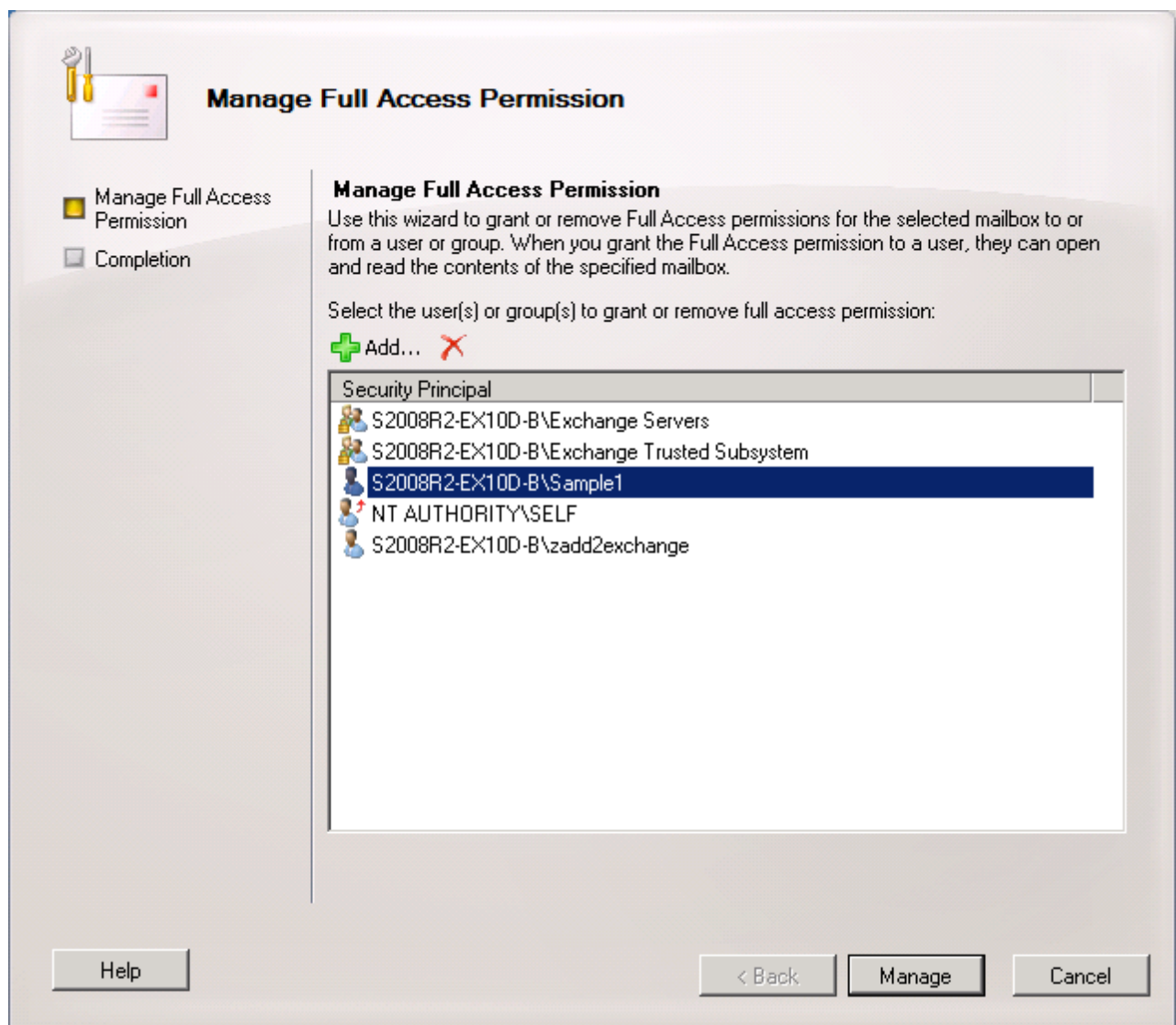
1. Click **Mailbox** and select the mailbox you want to give permissions to, Sample 1 in this example, right click and select **Manage Full Access Permission...**



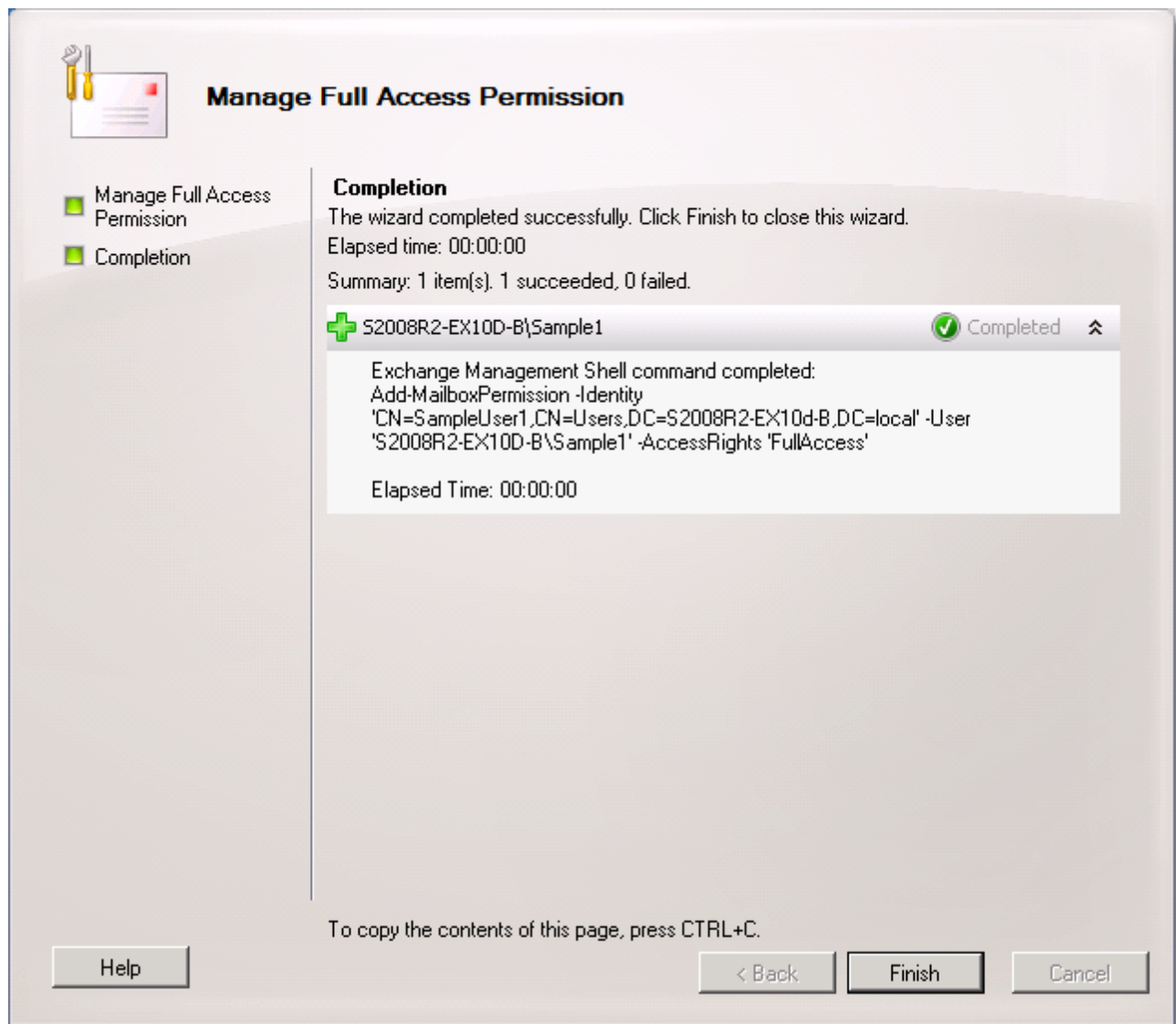
2. Click **Add...**



3. Scroll down and find the user you want to give permissions to. Click **OK**.

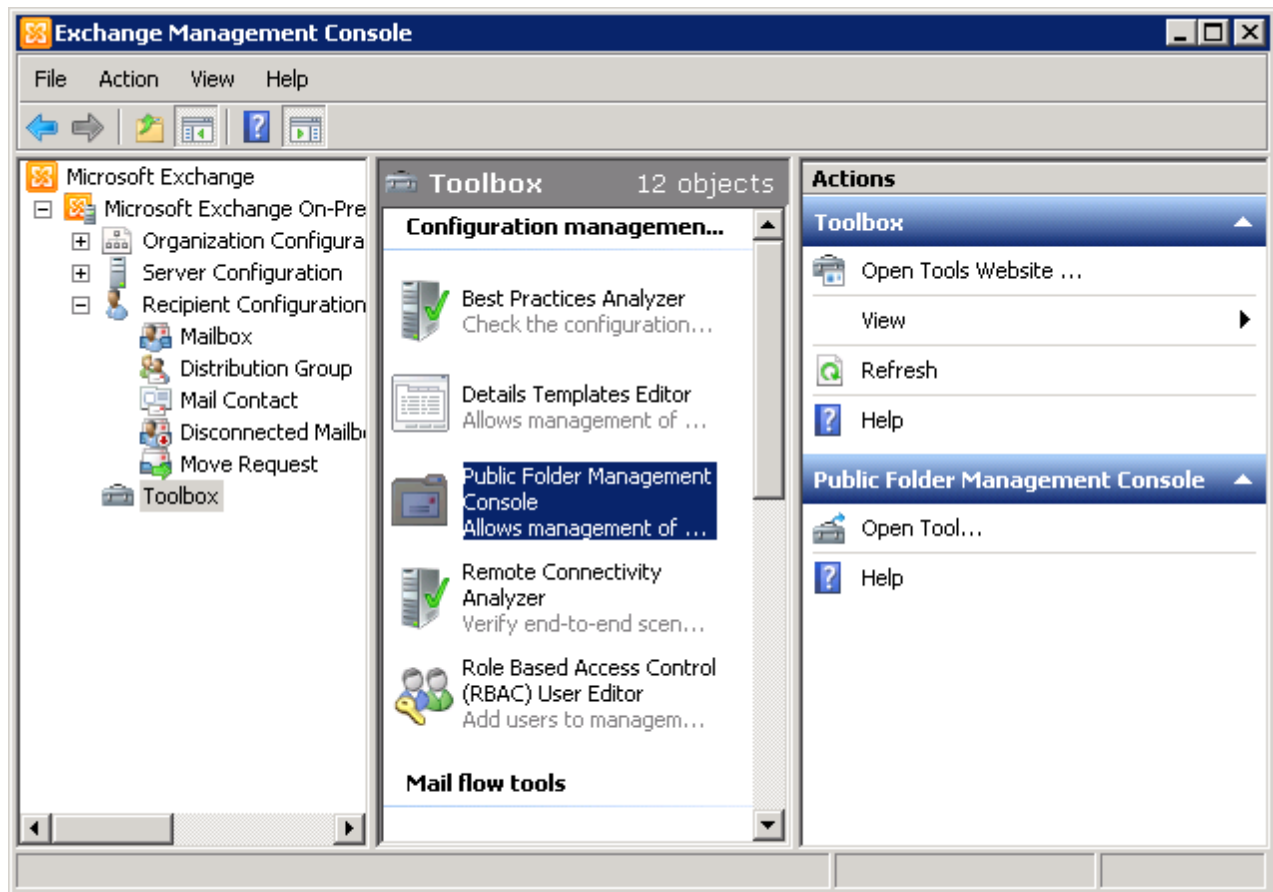


4. Select the user and click **Manage**.

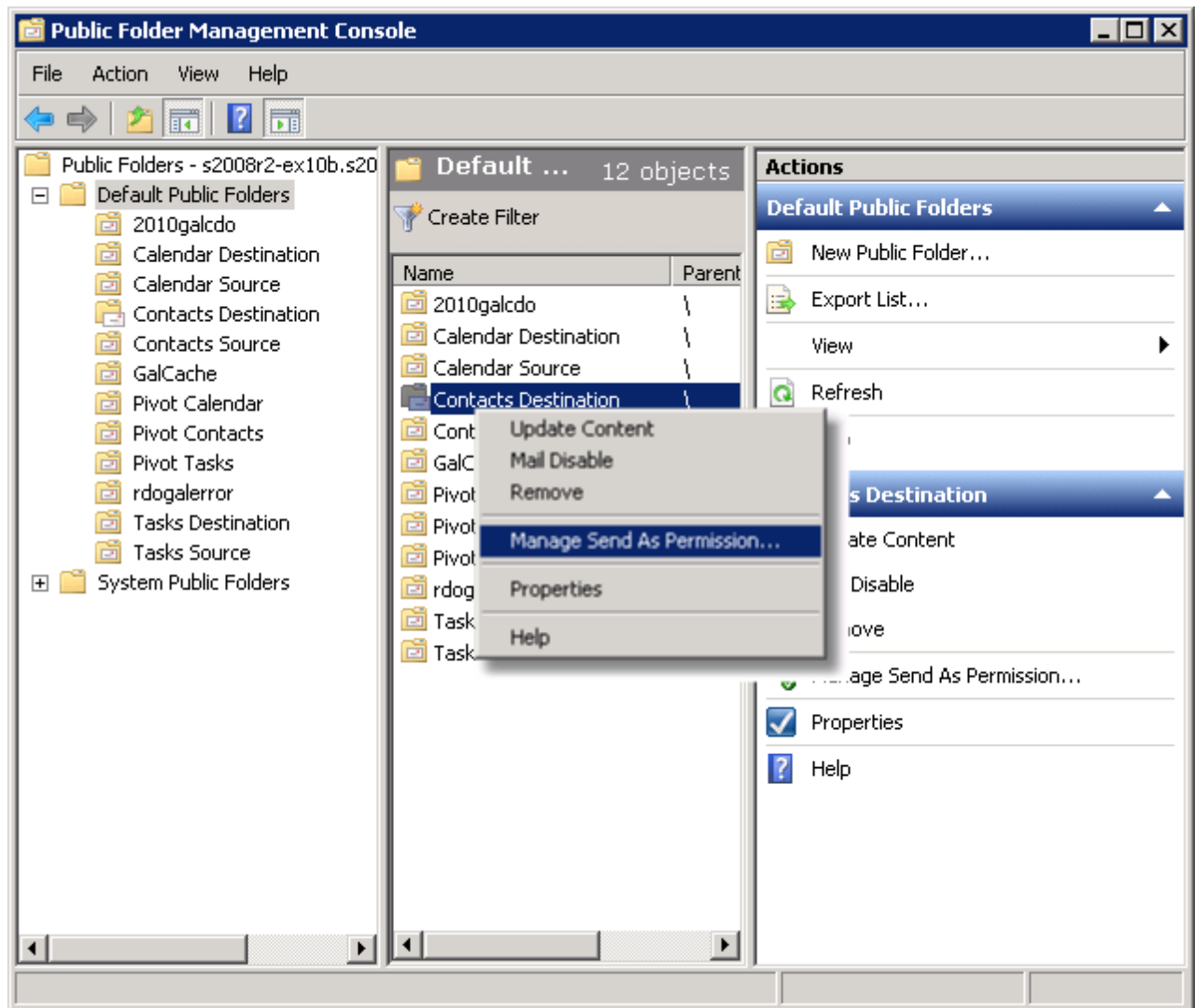


5. Click **Finish**.

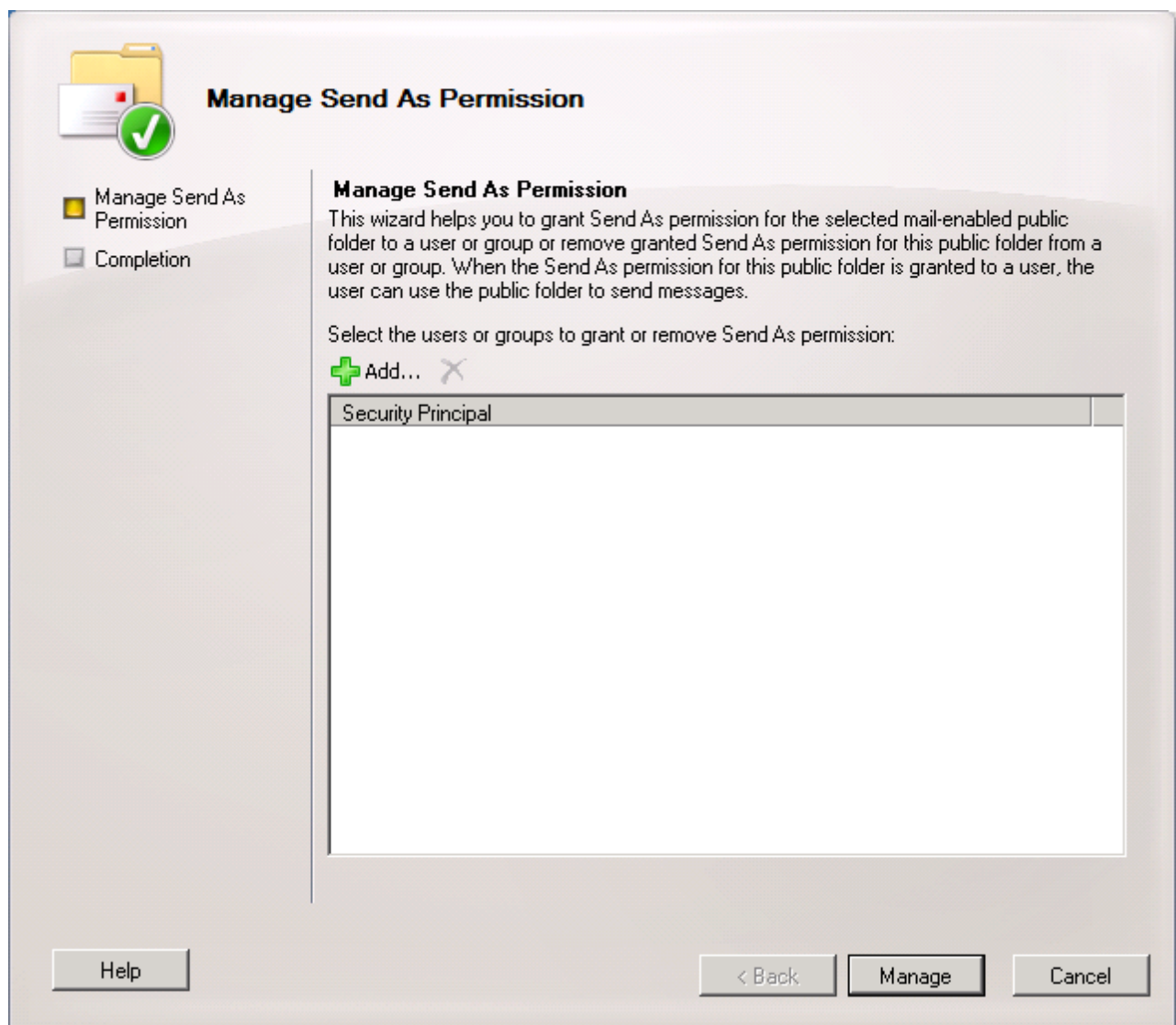
Giving Public Folder Permissions:



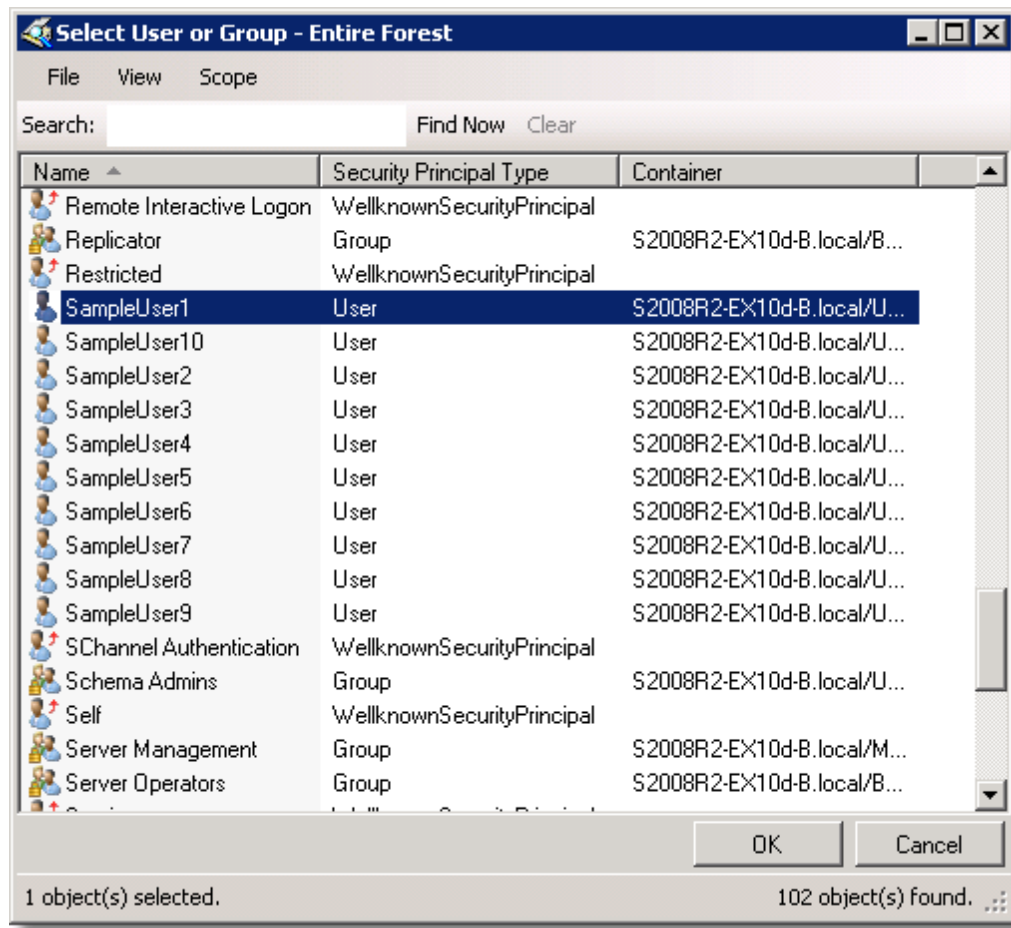
1. In the **Exchange Management Console**, click **Toolbox** and select **Public Folder Management Console**.



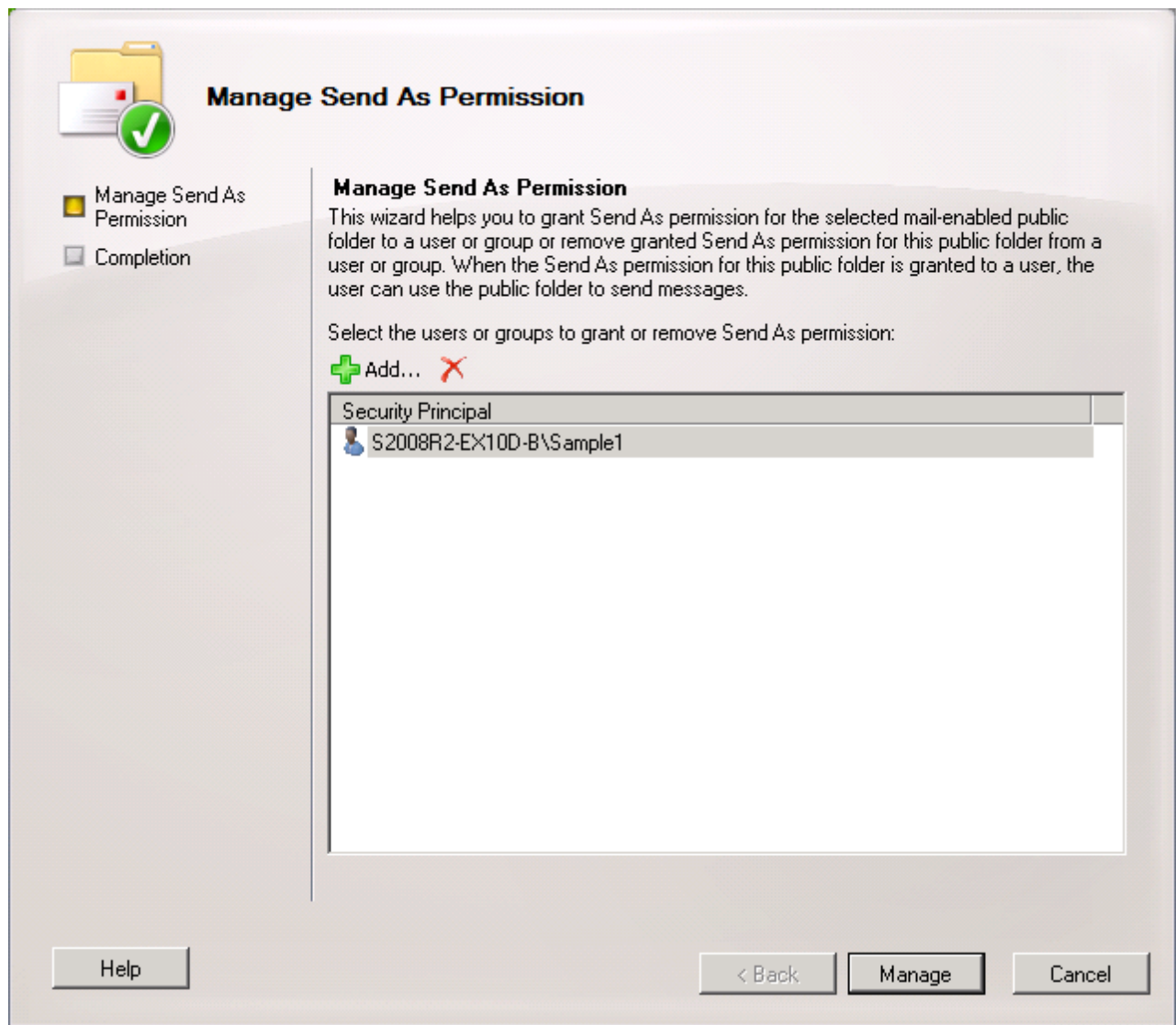
2. Click on **Default Public Folders**, and from the second box select the folder you want to give permissions to and right click, selecting **Manage Send As Permission...**



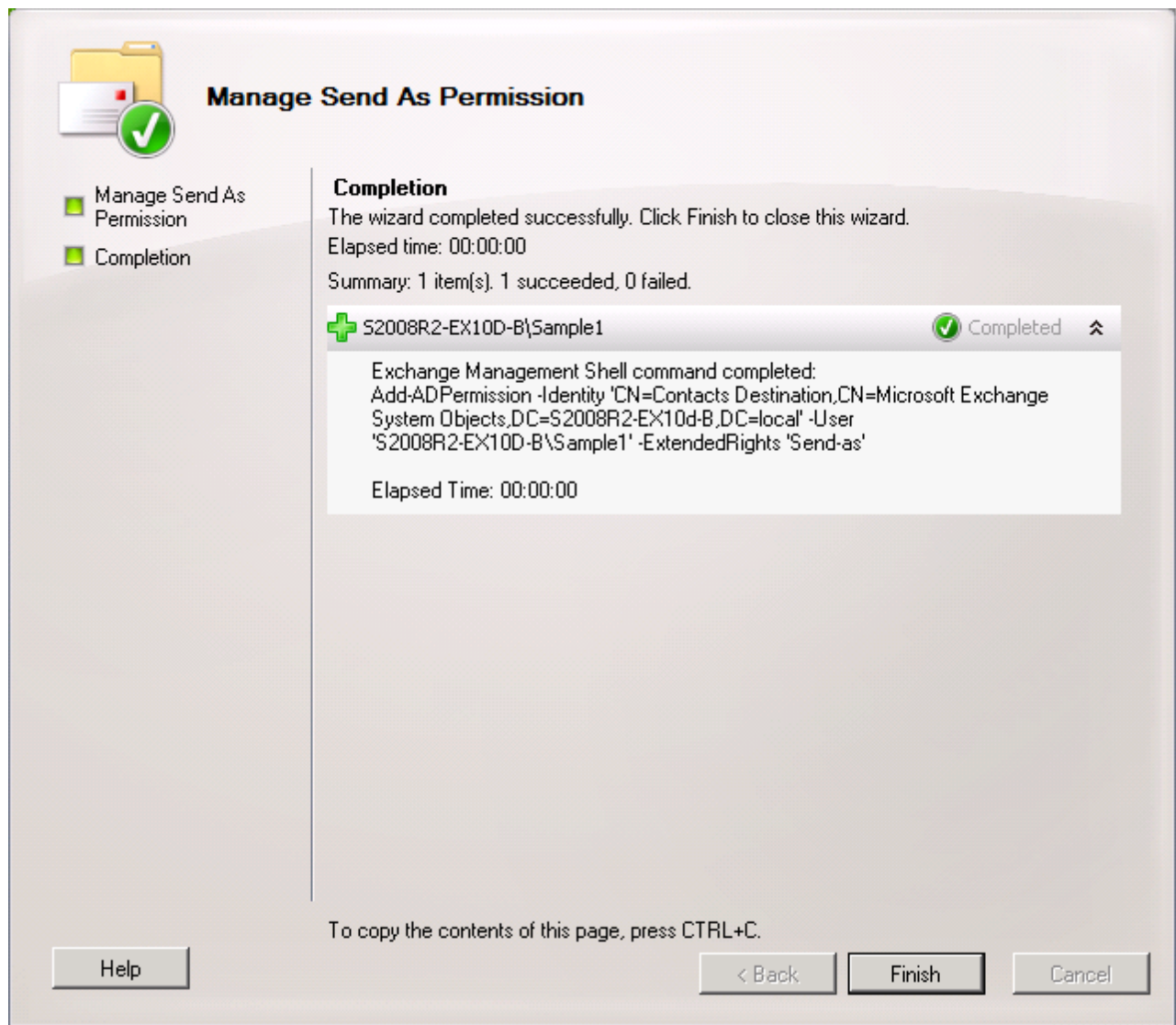
3. Click **Add...**



4. Scroll down and select the user you want to give the permissions to. Click **OK**.



5. Select the user and click **Manage**.



6. Click **Finish**.

3.8 Quick Install

Please DO THE PREREQUISITES above prior to continuing with the installation of this software!

Please consider using the next section, Detailed Install, to install for novice users and to ensure proper installation.

Verify the following from the previous steps:

- Verify the account you are using for replication (the replication service account, or service account) has client "Owner" rights to the public and private folders in Outlook or from Exchange System Manager.
- Log on to the workstation as the service account – the user whose domain account must be part

of the local “Administrators” group of the local machine.

- Make sure Outlook is closed and Outlook is NOT in Exchange Cached mode. Extract the file from <http://support.diditbetter.com/downloads.aspx>. Run the Add2Outlook FULL setup program - right click, run as Administrator, if applicable.
- The setup will automatically install the correct version for your version of Outlook.
- Open Outlook and accept the prompt to install and activate Add2Outlook.

If on a mobile laptop which will go offline, set up any public folders favorites as offline replicated folders and set the relationships to those folders so Add2Outlook can function optimally. If this is a dedicated replication workstation and will not go offline, go to the next step.

- Right click a folder and select the Add2Outlook Tab.
- Add a new relationship through the Add2Outlook for Calendars Console.
- Set up the desired relationship(s).
- Choose your source and destination folders.
- Choose Relationship Characteristics.
- Choose Add2Outlook Operation Mode – manual or timed.
- Replicate.

Try your FREE 10 day trial and enjoy almost effortless calendar synchronization!

Licensing: Later during licensing, the replication workstation or each of the installations on your network must license the product separately, but if an entire organizational license is purchased and the users are part of the same organizational unit, the same key can be used for each member of that Exchange Organizational Unit.

Post install recommendation: Consider excluding the installed program's directory and subdirectories from Antivirus Active file scanning.

The default installation location is: C:\Program Files\OpenDoor Software®.

3.9 Detailed Install

Installing Add2Outlook on your Workstation

Please continue to read this entire document prior to installation of the software!

Checklist:

- User Access Control has been turned off (if applicable) and the system has been rebooted.
- You are logged into Windows as the User to install and operate the Add2Outlook Console software.
- The user is an “Administrator” of the local machine so he or she can install software.
- There are no group policies that prohibit the installation of software even though the user is an

Administrator of the local machine.

- Outlook is closed.
- Outlook is configured to be able to connect to your Exchange Server. You cannot install, configure and upgrade this program offline.

Installation on a Standalone Machine

Get the latest software from our downloads page at: <http://store.diditbetter.com/downloads.aspx>.

Upgrades are not necessary to license the product, but please use the latest release. If upgrades to Add2Outlook are done, the relationships will not be removed between upgrades. The relationships remain there. If upgrades to Outlook are done, an uninstall of the previous version of Add2Outlook can be done and installation of newer version for that version of Outlook can be done seamlessly. All relationships and settings remain after the upgrade. Upgrades are free during the software assurance period. To upgrade FREE to later versions, please make sure you have the valid Software Assurance policy in place.

Tip: Please keep the installation files in a safe place. Diditbetter Software does not provide retired releases of the software, but will provide the latest version which works with MS Critical Service packs in effect at the time.

The zip file has the Full installation, including supporting files and the Add2Outlook installation, it includes the Add2Outlook setup file for updates (once the full version is installed once, the prerequisites are installed on the machine and updates can be done by running only the vAdd2Outlook.msi, and the latest manual.

Note: you can always run the Full, because if the prerequisite supporting files are already installed, it will bypass that part of the installation and just install the new version of Add2Outlook. The standalone msi is included for automated software installation as part of AD policies.

Important! Download the version of Add2Outlook which matches your installation of Outlook.







If you are running Outlook 2003, download and install 2003Add2Outlook_X.xx.xxx

If you are running Outlook 2007, download and install 2007Add2Outlook_X.xx.xxx

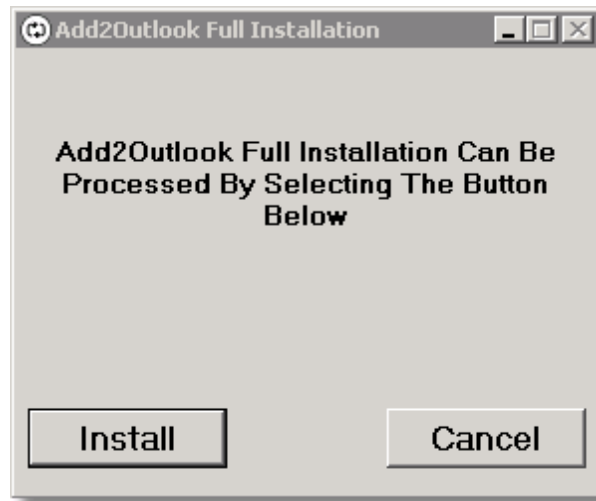
If you are running Outlook 2010, download and install 2010Add2Outlook_X.xx.xxx

* In our example screenshots, we will install the Outlook 2010 version of Add2Outlook, and have downloaded 2010Add2Outlook_X.xx.xxx

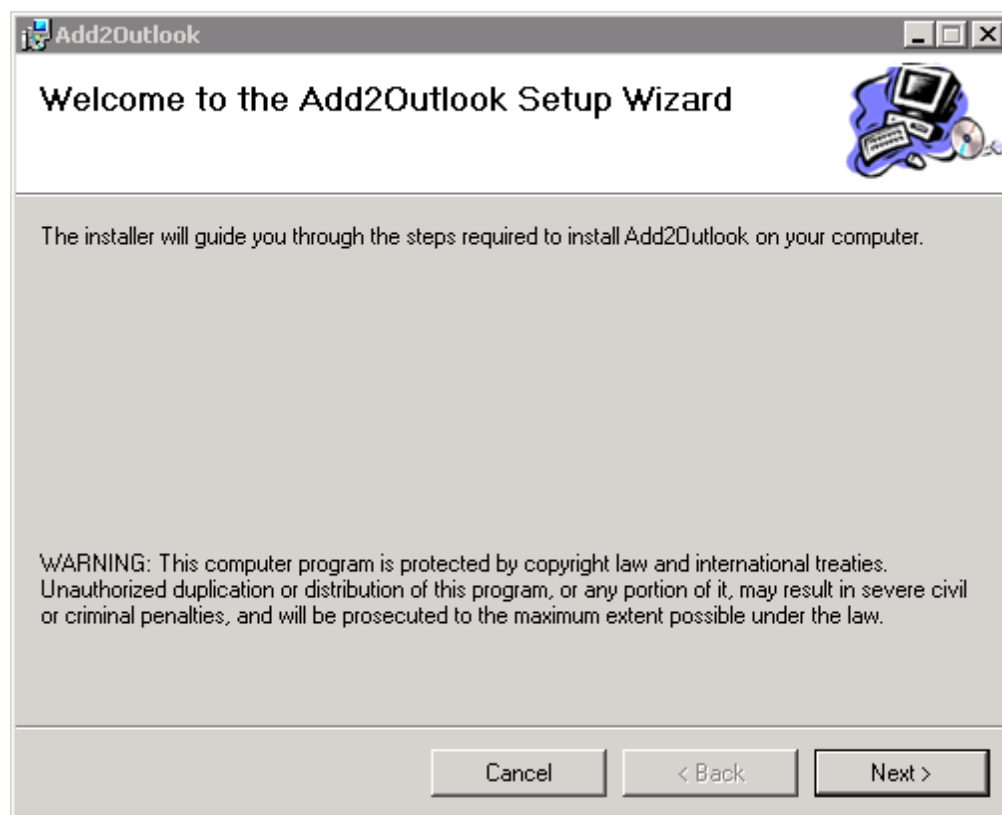
An example of the download file

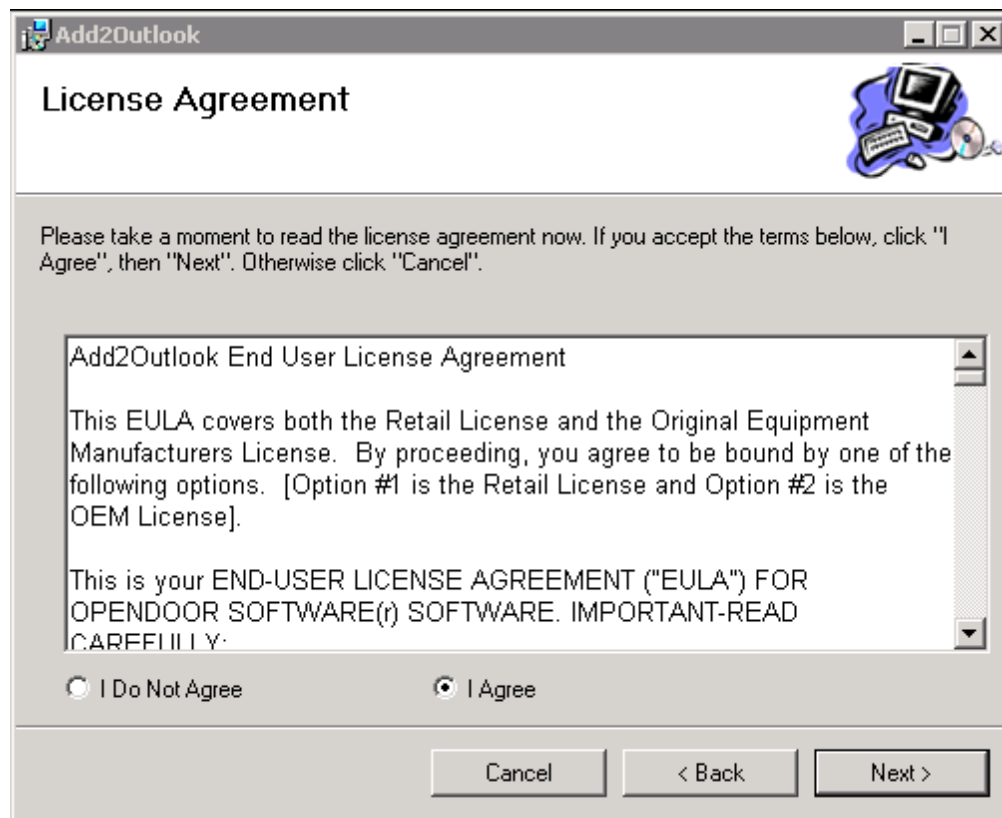
Name ^	Type	Compressed size	Password p...	Size	Ratio	Date modified
 2003 Add2Outlook.msi	Windows Installer Package	6,919 KB	No	7,258 KB	5%	6/6/2012 8:28 A
 2007 Add2Outlook.msi	Windows Installer Package	7,171 KB	No	7,512 KB	5%	6/6/2012 8:33 A
 2010 Add2Outlook x64.msi	Windows Installer Package	7,677 KB	No	8,026 KB	5%	6/6/2012 8:38 A
 2010 Add2Outlook.msi	Windows Installer Package	7,170 KB	No	7,511 KB	5%	6/6/2012 8:35 A
 Add2Outlook Full Installation.EXE	Application	37,145 KB	No	37,225 KB	1%	6/6/2012 8:40 A
 Add2Outlook_Guide.pdf	PDF File	1,282 KB	No	1,472 KB	13%	9/26/2011 12:36

1. Run the self extracting executable and it will Extract the files to a directory.
2. Close Outlook.
3. The first time you run it on that machine, run 2010Add2Outlook Full.exe.
4. Please follow the screens and accept the defaults.



The Supporting files will be installed, and you will be prompted with the installation dialogs:

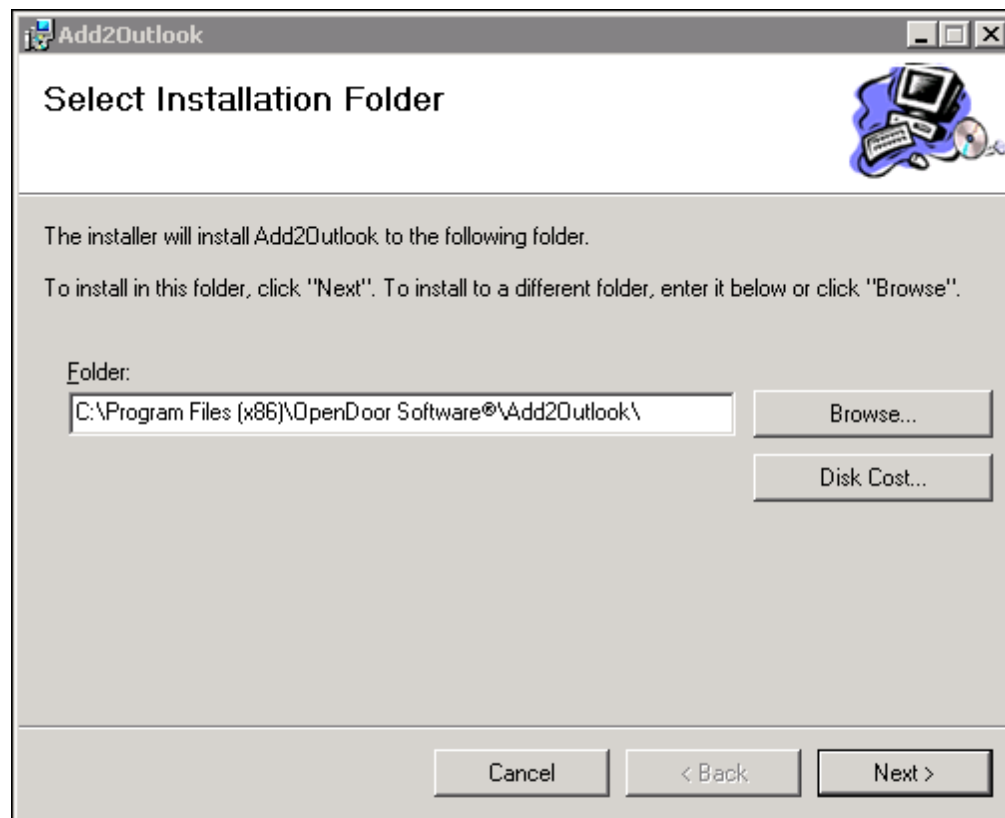




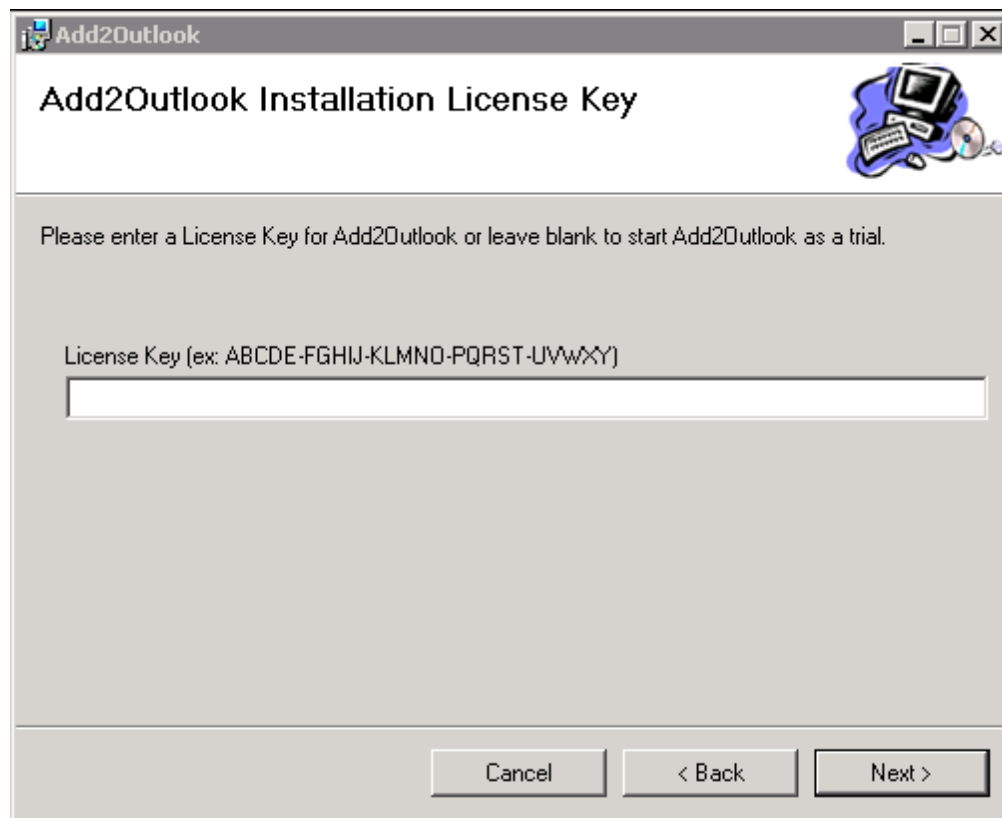
5. Select **"I Agree"** to continue with the Installation.

6. In the Select Installation Folder window, to accept the default path, click **Next >** to continue.

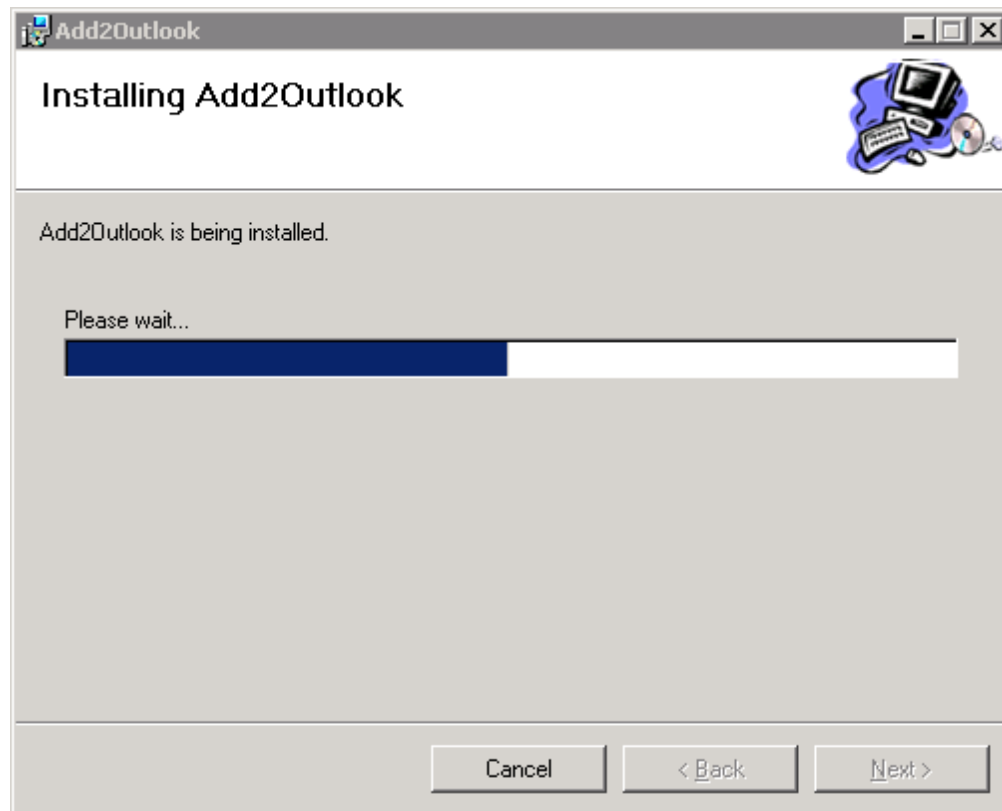
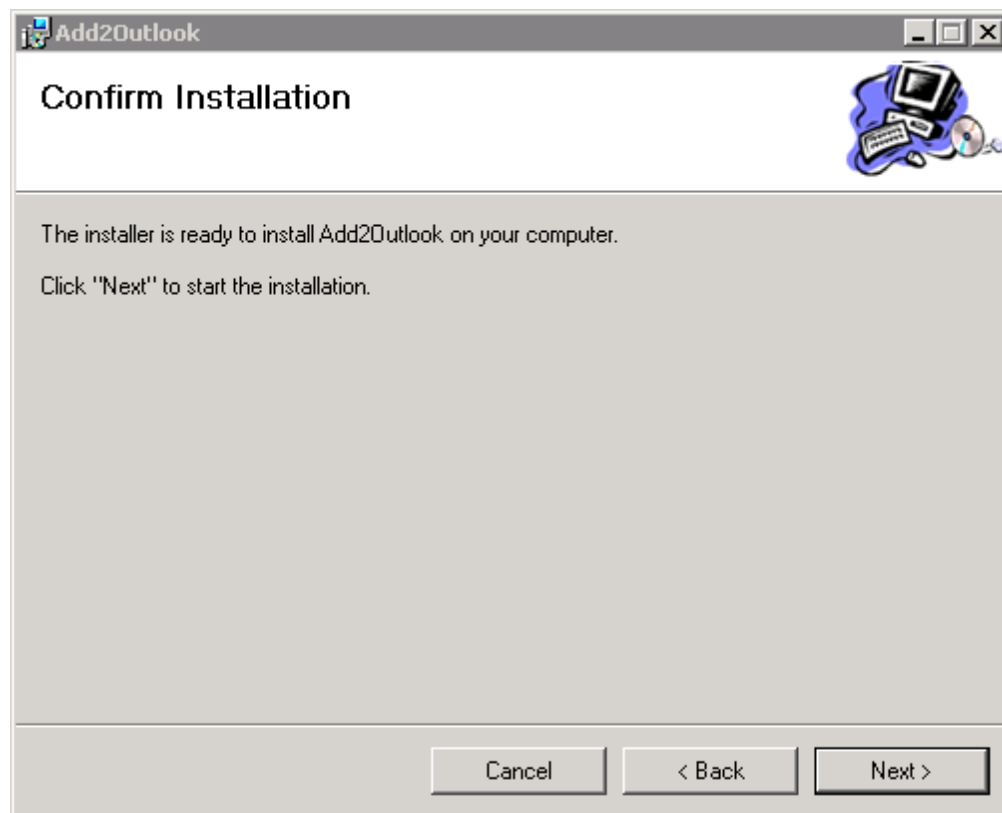
Note: To install Add2Outlook® in a different folder, enter it in the Folder field if you know the exact path or click **Browse** to find the desired folder.

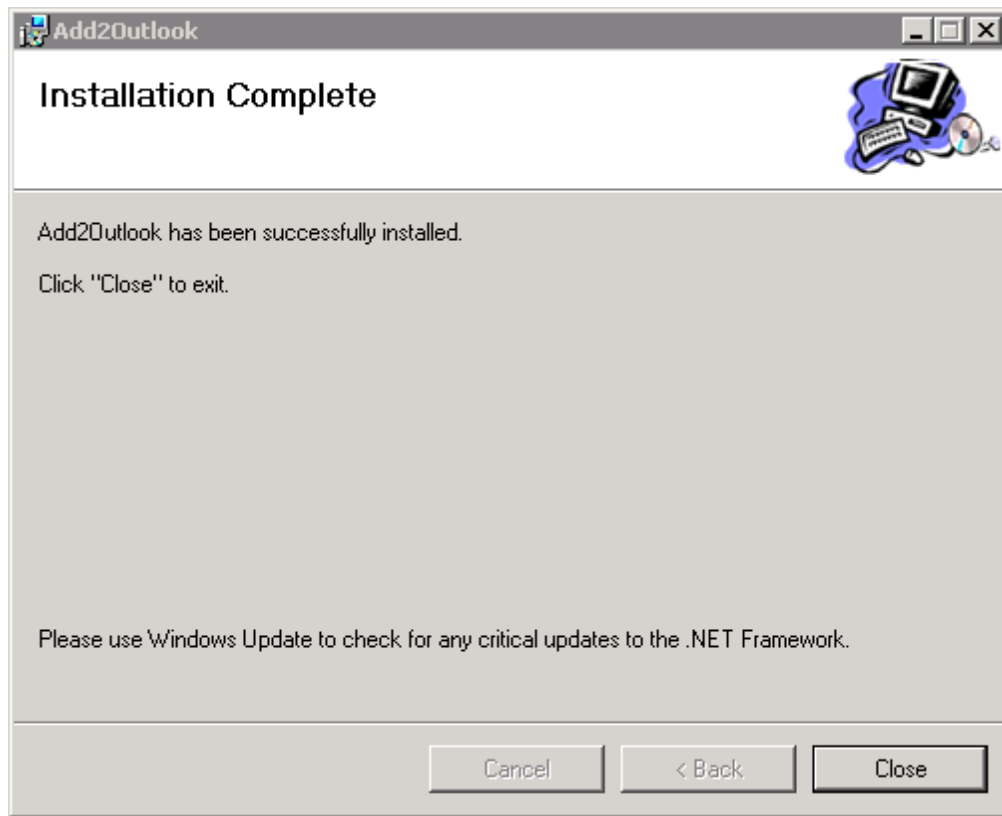


7. Once the setup parameters have been defined, click **Next >** to continue to the Confirm Installation window.



8. This screen will allow you to paste in the key if you have licensed the program. This will install the program with the license already applied and assists when doing automated software installations, or when installing the program to more than one workstation. If you are in trial or have not purchased the program yet, leave this screen blank and press **Next >** to continue and the program will install in the trial mode. The trial software will convert to live software with the key. Upgrades are not necessary to go live, and if upgrades are done, the relationships will not be removed between upgrades. The relationships remain there.





Congratulations! You have successfully installed and are ready to configure Add2Outlook.

At this point, Add2Outlook has successfully been installed on the computer, but has not been activated.

Next we need to go to the next section to open Outlook, activate the Com Add-in and set up a Relationship which can be found in [Usage](#).

3.10 Upgrading

If you are upgrading your existing version of Add2Outlook, please review and certify your system prior to installation as detailed in the section [System Requirements](#). Refer to <http://support.diditbetter.com/Forums/Thread.aspx?pageid=120&mid=180&ItemID=12&thread=111> for upgrade instructions.

Add2Outlook Upgrade Instructions

Important: Verify that you have valid software subscription before proceeding to get the upgrade for FREE. The Subscription dates are listed next to your license key in the Add2Outlook Console and your licensing email sent to you.

You are licensed for at least a year of free upgrades when you purchase or renew your license, sometimes longer if you purchase 2 or 3 year license renewals. This means you are entitled to get free "do it yourself" upgrades to the Software under your Software Assurance for that period. If you purchased Premier Support or an incident with your license, you have the option to let us remotely assist, without giving us any credential information through [Remote Support Procedures](#).

Please make sure you have the latest build of the version you are running from the download section.

Don't worry, UPGRADING WILL NOT LOSE RELATIONSHIPS nor SETTINGS!

The latest version of Add2Outlook is available at: <http://support.diditbetter.com/downloads.aspx>

Upgrading Add2Outlook is a relatively easy process which should only take a few minutes. Below we have listed a simple step by step guide on the upgrade process.

1. Make sure Outlook is closed before performing this upgrade
2. Verify that you have valid software subscription before proceeding
 - o The Subscription dates are listed next to your license key in the Add2Outlook Console and your licensing email sent to you.
3. Visit the [DidItBetter Download Center](http://support.diditbetter.com/downloads.aspx), to retrieve the necessary upgrade
 - o If you do not know your user name, please [contact us](#) to look it up for you
4. Choose the link for the version of Add2Outlook you have installed, Standard or Enterprise
5. **There is no need to remove the prior version of Add2Outlook.**
6. To upgrade Add2Outlook
7. Together or in preparation for remote assistance support, download and install the released version from here for your convenience: <http://support.diditbetter.com/downloads.aspx>
8. First, please do your MS critical updates and reboot prior to the A2O upgrade
9. To upgrade Add2Outlook
10. Close Outlook and install over the older edition
11. To do this, extract the zip file to your "zlibrary" folder for Add2Outlook setups.
12. TIP: For first time installs, the folder must be run on the local machine and not a mapped drive.
13. Right click the Full Add2Outlook installation file and run as administrator (if applicable)
14. It will automatically install the correct version of Add2Outlook for the version of Outlook you have installed.
15. Open the Add2Outlook Console and make sure you are still licensed and if not, submit a license request using [these procedures](#):

If you have other questions and email support is not fast enough, please use the online support search located here:

<http://support.diditbetter.com/>

From there you can search forum postings, consult the knowledgebase and troubleshooter guide.

Upgrading after Trial or Software Assurance Expiration

If your trial period ended, you will need to purchase a license to activate the solution and upgrade to the newest release. New licenses are available with one, two or three year software assurance.

If you are already licensed for Add2Outlook, please renew your software assurance subscription before it expires in order to continue taking advantage of free Add2Outlook updates and upgrades as they are released.

If you were already licensed and your software assurance has expired, you must first purchase an upgrade license to install the new release. If you already attempted to install the upgrade outside your software assurance, you will need to purchase an upgrade license since downgrading the new installation to a previous installation is not recommended as it may not work and will require paid technical support services.

3.11 Purchasing Your Add2Outlook License

Once the trial period ends, to activate the solution from trial mode, you will need to purchase an Add2Outlook license. Reinstalling Add2Outlook will not extend the trial. Add2Outlook licensing is available in tiers based on the number of relationships needed; the licensing is available for 2, 6, 50 or 200 relationships; you can license one folder type or the sync suite. We also offer several value bundles which include the license specified, the Add2Outlook Toolkit specialty tool license, a 4 hour premier support package for remote/phone support assistance with one of our techs during our normal business hours and scheduled by appointment. Each new license also includes software assurance for one, two or three years which covers your free updates, free upgrades and free email support for the duration of the software assurance period. To place your order, please visit our secure online store at: <http://store.diditbetter.com/t/product-class/add2outlook>.

If you need remote support for assistance with the installation and configuration of our software, we offer per session support for around \$199, in addition to several premier support packages (2 hour, 4 hour, 8 hour block). For more information on our technical support lineup, please visit: <http://support.diditbetter.com/premium-support.aspx>.

For a licensing recommendation, please initiate live chat from our website, email us at info@diditbetter.com, or call us between 9 a.m. to 5 p.m. EST at (813) 977-5739 or (800) 837-8636.

Special pricing is available for eligible government agencies, academic institutions and non-profit organizations. Please include a copy of your non-profit certificate with the value bundle you would like to order in an email to info@diditbetter.com.

3.12 Licensing Add2Outlook

For pricing and order form, please visit <http://store.diditbetter.com/> and click on the Buy Now link which will take you to our Diditbetter.com Online Store. To fax your order, you will need to download the order form in a .PDF format. Print and complete the order form and fax it back to (813) 972-7986. To talk to a live representative, please contact 813-977-5739 or 800-837-8636 between 9-5 EST.

Priority Service Phone support and remote administration support programs are also available. We are

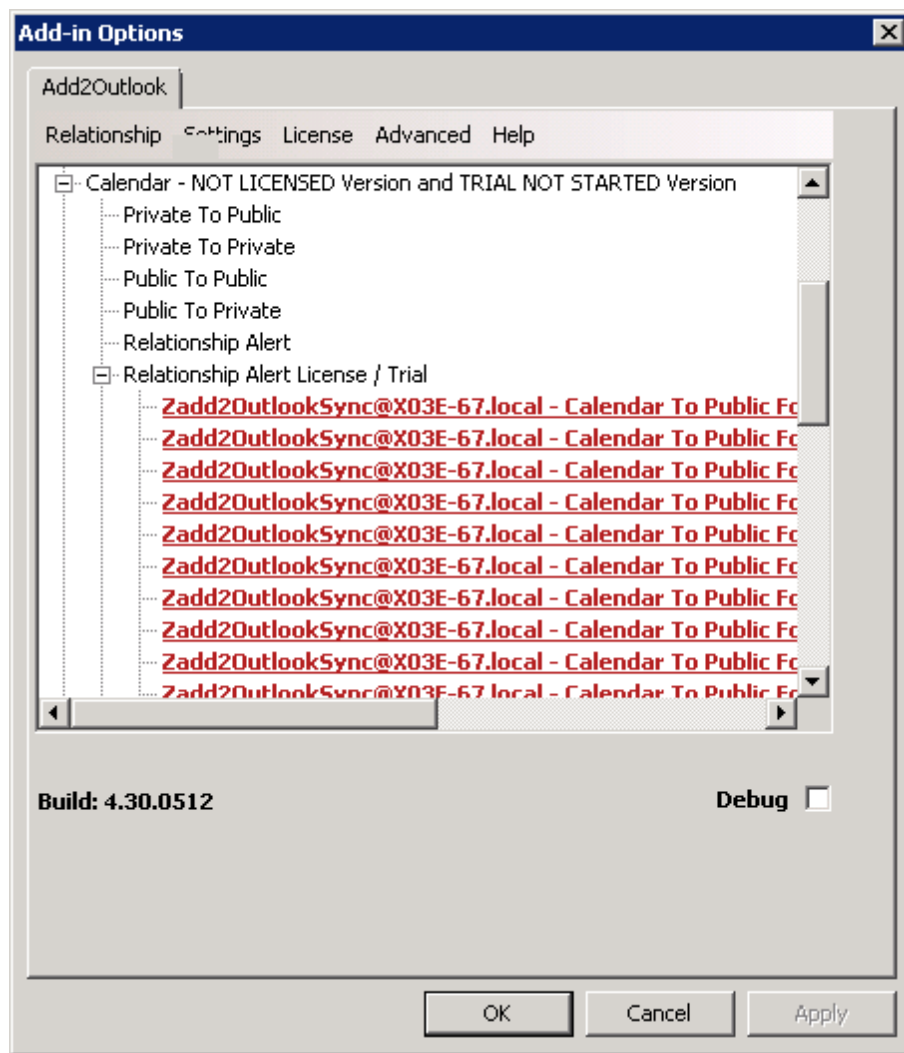
now offering Remote installation and configuration of our software for around \$149, and Premier Support is available free with Value Bundles.

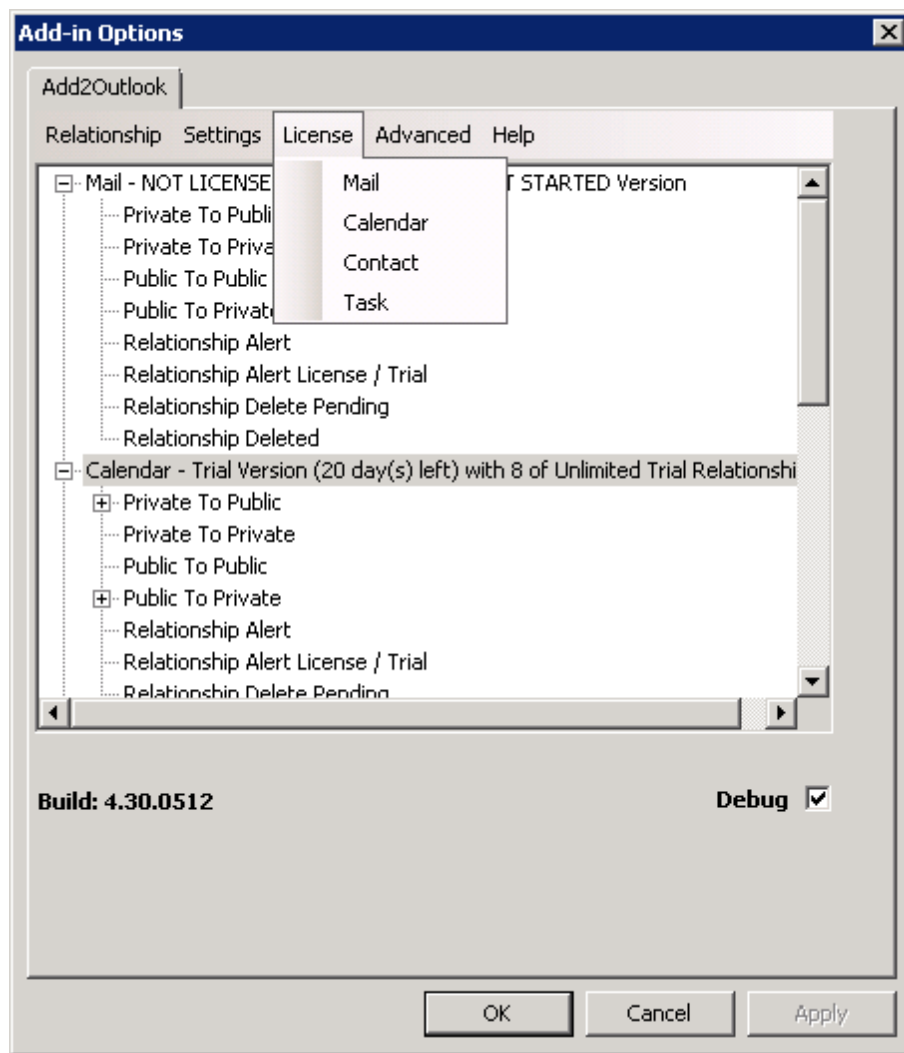
Once we receive your order and process your payment, you will need to submit a product activation request so our Licensing Desk can generate a license key from your address information and email it back to you. You will paste the key in the license information field as directed to complete the product activation. Once you receive a license key, you can use the key during the installation or using software distribution techniques.

To activate the product, please refer to the instructions.

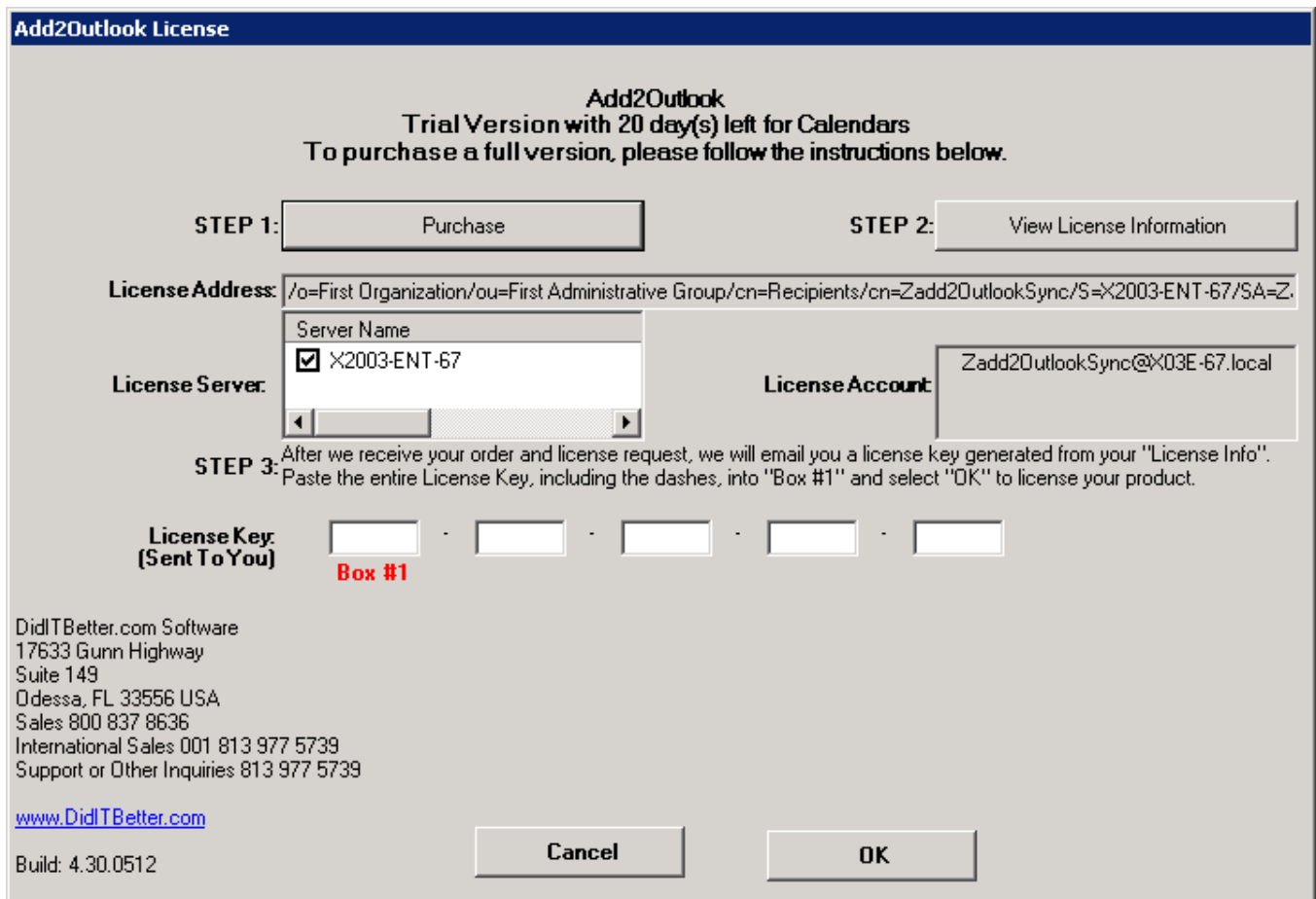
If you're within your trial period, go into the Console, and select License and follow the instructions outlined below.

If you're out of trial and the program has not been licensed, you will get the following screen when going into the Add2Outlook Console. The top of the Console screen shows you the program is not licensed and is out of trial and will not replicate until you purchase a license, and activate it for that type of folder. After the 21 day trial period, you will receive the screen from the Console stating the relationships are in alert because Add2Outlook is not licensed. You can delete the relationships, and remove the destination copies, but cannot add any more relationships and cannot sync until licensed.





Each type of relationship, calendar, contacts and tasks is licensed separately. To license, select **License** from the dropdown and select the folder you are trying to license. To request an activation key, select the folder type you are trying to replicate. In our example, we will license calendars.



Add2Outlook License

Add2Outlook
Trial Version with 20 day(s) left for Calendars
To purchase a full version, please follow the instructions below.

STEP 1: **STEP 2:**

License Address: /o=First Organization/ou=First Administrative Group/cn=Recipients/cn=Zadd2OutlookSync/S=X2003-ENT-67/SA=Z.

License Server:
☒ X2003-ENT-67

License Account: Zadd2OutlookSync@X03E-67.local

STEP 3: After we receive your order and license request, we will email you a license key generated from your "License Info".
Paste the entire License Key, including the dashes, into "Box #1" and select "OK" to license your product.

License Key (Sent To You) - - - -
Box #1

DidItBetter.com Software
17633 Gunn Highway
Suite 149
Odessa, FL 33556 USA
Sales 800 837 8636
International Sales 001 813 977 5739
Support or Other Inquiries 813 977 5739
www.DidItBetter.com
Build: 4.30.0512

Be sure to check the Exchange Server name in the License Server (if there is one). If you are replicating locally, select the account to license.

When you have purchased and have been sent an activation key, click on the Help/License button and pick the application type you are trying to license. From the following screen you will enter the key and activate the product for replication on that type of folder. After the trial period, Add2Outlook will not replicate until you license it.

Step 1 Purchase: Go to the website <http://store.diditbetter.com/t/product-class/add2outlook> and look at the Value Bundles.

Step 2 View License Information: Select this option and fill out the appropriate information. Be sure to select the kind of user you are and depending on your option, another information tab shows up.

Add2Outlook License Information

I am the

☐ End User

☐ Authorized Diditbetter.com Software Reseller

☒ Independent IT Consultant working for the End User

☐ Employee of the End User

End User | **Independent Consultant**

May we contact the End User? ☒ Yes ☐ No

Company: The End User Company Information

First Name: The End User First Name

Last Name: The End User Last Name

E-Mail: The End User Email@domain.com

Phone #: 8005551212 **Country Code:**

Address: EU Address

EU Address 2

City: EU City

State Code: FL **Zip Code:** 33556

DidItBetter.com Sales Rep:

☒ I work with a Consultant **License What?**

Build: 4.30.0512 **Cancel** **Accept** ***REQUIRED**

Fill all tabs out and then go back to the **End User** Tab. Select "**License What?**". Select the option you are licensing.

The software is licensed to the end user and if you are a consultant, you have the option to include your information.

For your Account rep, fill in the name of your contact and if you do not have one, leave blank.

License What?

Once the End User information is done and completed, go to the first tab and select "**License What?**".

Select the appropriate product name if there is more than one. Select multiple if you are trying to license more than one product.

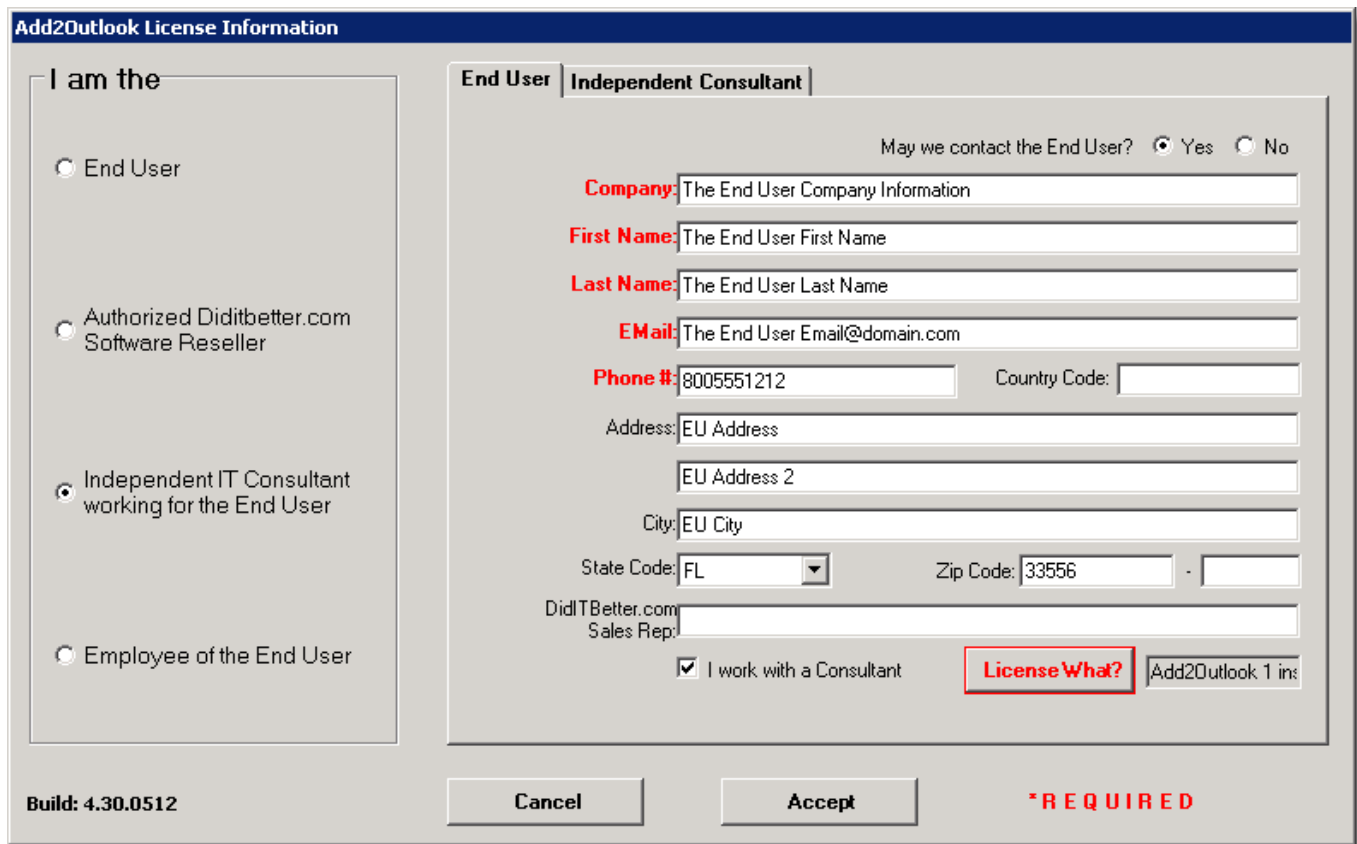
Add2Outlook License Product

Available Products To License		Description
<div>Add2Outlook</div>		The Add2Outlook AddIn is installed on the workstation and is necessary to use Add2Outlook. This license includes the ability to synchronize as many Folder versions. Each user who uses Add2Outlook must have the AddIn installed and licensed.

Type	Number	Duration
<input type="radio"/> Mail <input type="radio"/> Contact	1	NA
<input type="radio"/> Calendar <input type="radio"/> Task	2	
	3	
	4	

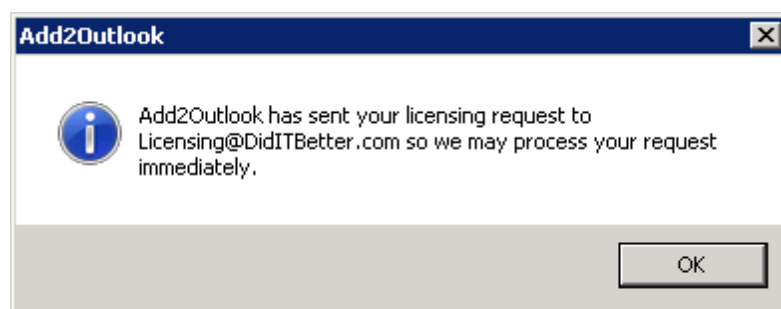
Available Licenses (choose an existing license to renew)

Build: 4.30.0512



The dialog box is titled "Add2Outlook License Information". It contains two main sections. On the left, under the heading "I am the", there are four radio button options: "End User", "Authorized Diditbetter.com Software Reseller", "Independent IT Consultant working for the End User" (which is selected), and "Employee of the End User". On the right, under the heading "End User" with a sub-tab "Independent Consultant", there is a form for user information. It includes a checkbox "May we contact the End User?" with "Yes" selected. Below this are fields for "Company:", "First Name:", "Last Name:", "E-Mail:", "Phone #:", and "Country Code:". There are also fields for "Address:" (with two lines), "City:", "State Code:" (a dropdown menu showing "FL"), and "Zip Code:". At the bottom of this section, there is a checkbox "I work with a Consultant" which is checked, and a red-bordered button labeled "License What?". The bottom of the dialog box features a "Build: 4.30.0512" label, "Cancel" and "Accept" buttons, and a red asterisk followed by the word "REQUIRED".

When done selecting, press **Accept**. Then on the original screen, press **Accept** again and an email license request will be sent to our offices, you will see a message like below.



Once we have the payment and appropriate paperwork processed, we will send you a key via Email to the address specified.

Add2Outlook License

Thank you for trying Add2Outlook for Calendars!
This is a Trial Version with 17 day(s) left.
To purchase a full version, please follow the instructions below.

STEP 1: **STEP 2:**

License Address: /o=First Organization/ou=First Administrative Group/cn=Recipients/cn=zAdd2Outlook.Sync/S=X2003-ENT-57/SA=zA

License Server: ☐ Mobile Address Book
☒ X2003-ENT-57 **License Account:** zAdd2Outlook.Sync

STEP 3: After we receive your order and license request, we will email you a license key generated from your "License Info".
Paste the entire License Key, including the dashes, into "Box #1" and select "OK" to license your product.

License Key: (Sent To You) - - - - **Box #1**

DidITBetter.com Software
17633 Gunn Highway
Suite 149
Odessa, FL 33556 USA
Sales 800 837 8636
International Sales 001 813 977 5739
Support or Other Inquiries 813 977 5739

www.DidITBetter.com

Build: 4.19.0511

Copy the entire key (including dashes) and paste it into box #1 and press OK.

If licensed correctly, it should thank you. Remember, reinstalling will not extend the trial.

Follow the same process for each type of folder desired for replication. The Console screen will show an indication that the application is licensed for that type of folder replication.

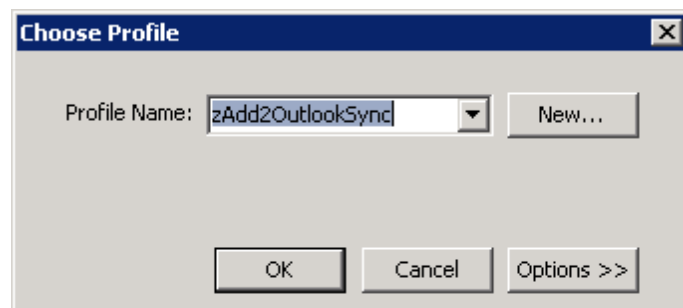
Again, thank you for your support.

4 Add2Outlook Administration Guide

A guide for the administrator of Add2Outlook. Covers concepts in-depth, deployment planning and implementation as well as routine administration.

4.1 Usage

Once Installed, Add2Outlook is ready to be activated for the profile. Open Outlook for the profile of the user who will be synchronizing.



You will be prompted to enable the Add-in. Accept the prompt to install the Add-in.

Add2Outlook consists of new buttons added to the toolbar of Outlook, and a configuration page.

Outlook 2010: The Console Tab or Configuration page is located in the File Options Add-ins page, Add2Outlook, or by right clicking a folder in the folder tree. The Sync Now/Stop Sync toggle button and Start/Stop Timer toggle buttons are available from the Add-ins toolbar on the top of Outlook.

Outlook 2007: The Console Tab or Configuration page is located in Tools, Options, Add2Outlook or by right clicking a folder in the folder tree.

Outlook 2003: There are two new buttons on the lower left hand corner of Outlook 2003 and the "Console tab" is located under Tools, Options or by right clicking a folder in the folder tree.

Visible Outlook Changes from prior releases:

- The Add2Outlook Sync Now button manually activates the sync process.
- The Add2Outlook Start/Stop Timer will activate and deactivate the timer you set up in the Console.
- The Add2Outlook Configuration Console or Tab creates the "Sync Relationships" you want to sync and is also now available by right clicking a folder in the folder tree.

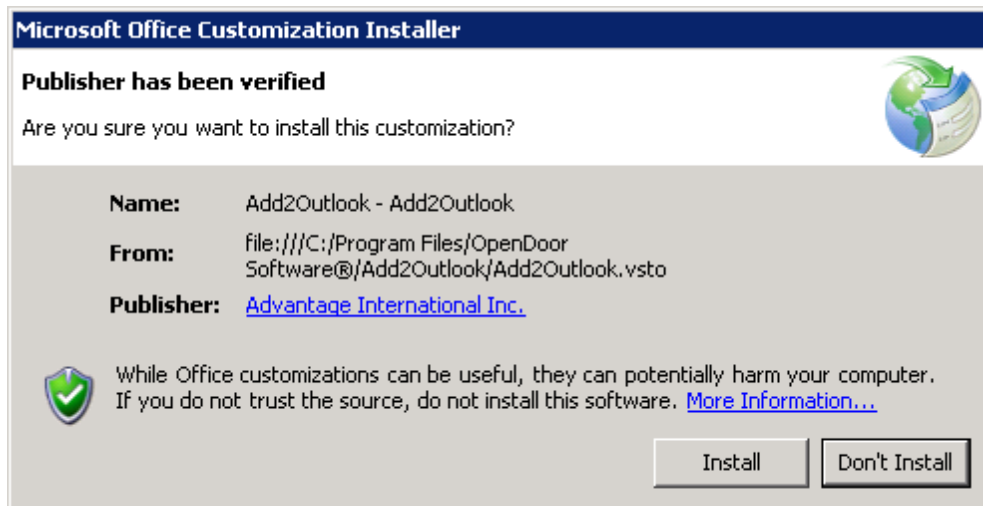
4.2 Activating the Add-in

Depending on your version of Outlook, you access the Add2Outlook Console or Configuration Tab differently:

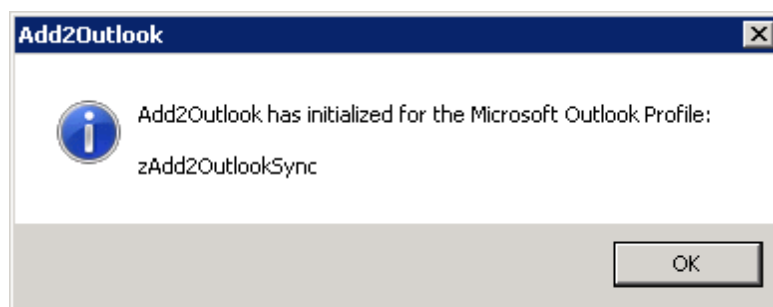
Outlook 2010: The Add2Outlook Console Tab or Configuration page is located in the File Options Add-ins page, Add2Outlook. The Sync Now/Stop Sync toggle button and Start/Stop Timer toggle buttons are available from the Add-ins toolbar on the top of Outlook.

Outlook 2007: The Console Tab or Configuration page is located in Tools, Options, Add2Outlook. The Sync Now/Stop Sync toggle button and Start/Stop Timer toggle buttons are available from the Add-ins toolbar on the top of Outlook.

Outlook 2003: The Add2Outlook Console is actually a tab from within Outlook Tools, Options, Add2Outlook. The Sync Now/Stop Sync toggle button and Start/Stop Timer toggle buttons are available on the lower left hand corner of Outlook.



We will continue with the Outlook 2010 installation example as the screens are the same. Open Outlook. You should be presented with the screen above.

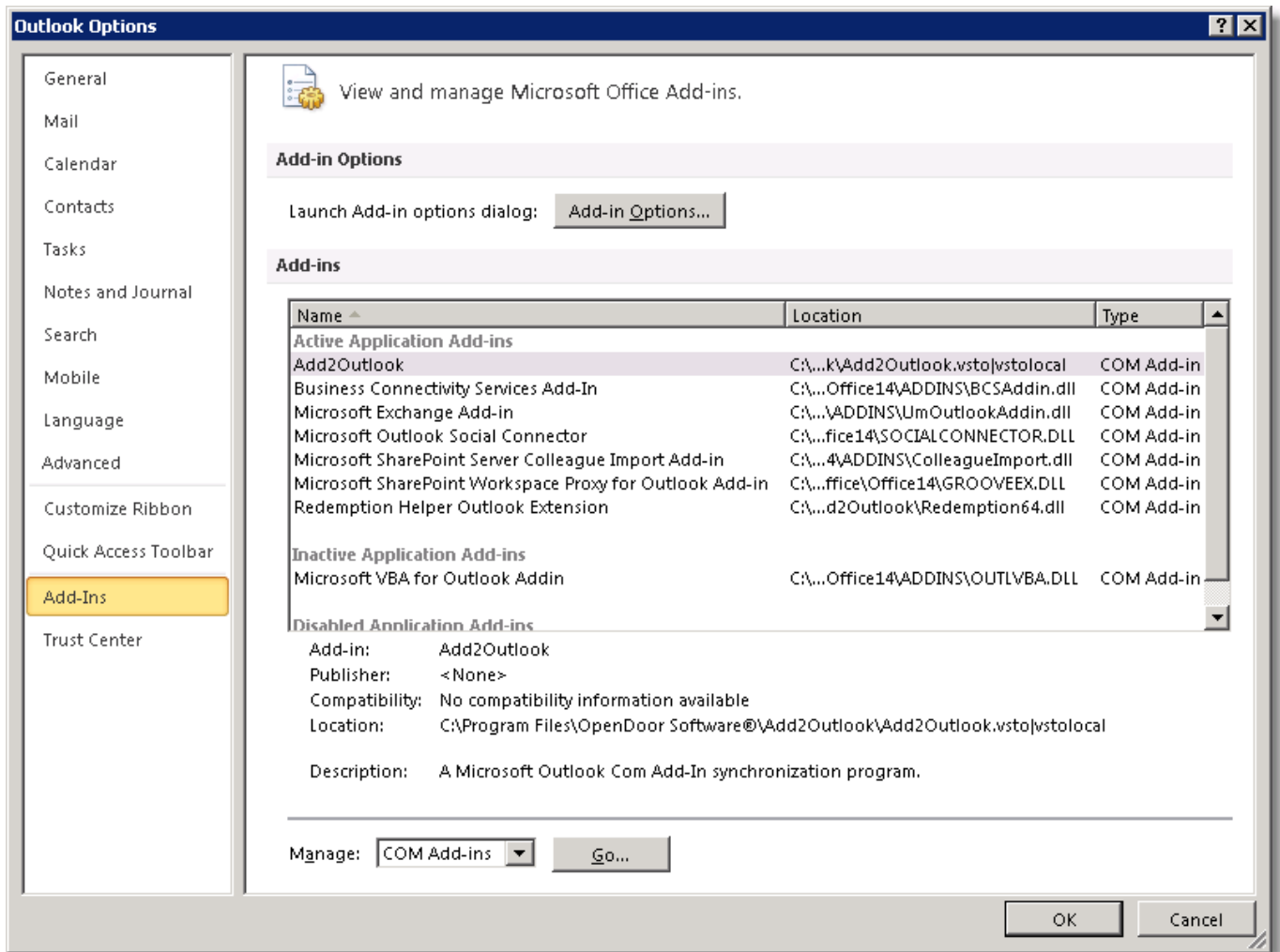


Then you should see something similar to the following above screen.

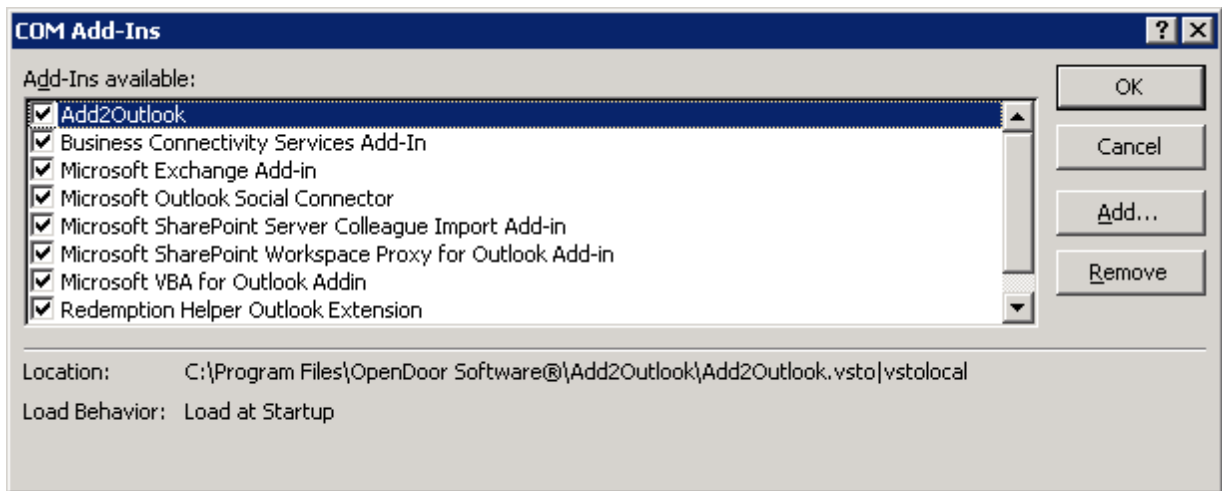
If you do see these options, Select **File** from the top drop down, **Options and Add-ins** and **Add-in Options**. If you do not see these options, follow the following **troubleshooting tip**: If the screens above don't show up or there are no Add-ins available in your version of Outlook, and the Add2Outlook add in does not show up, look to the screen shown below.

Outlook 2007: go to **Tools Trust Center** for the similar screen.

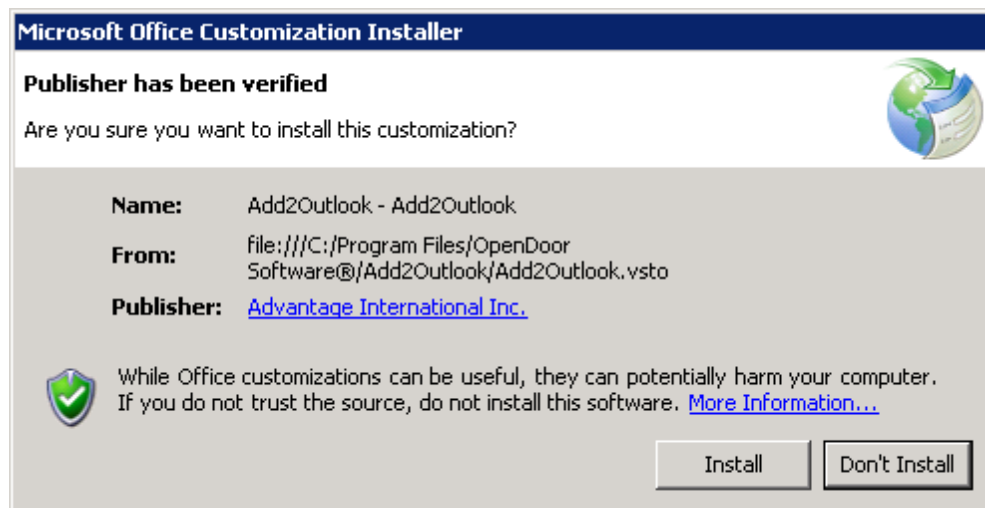
Outlook 2003: go to **Tools, Options, Advanced, Com Add-ins**.



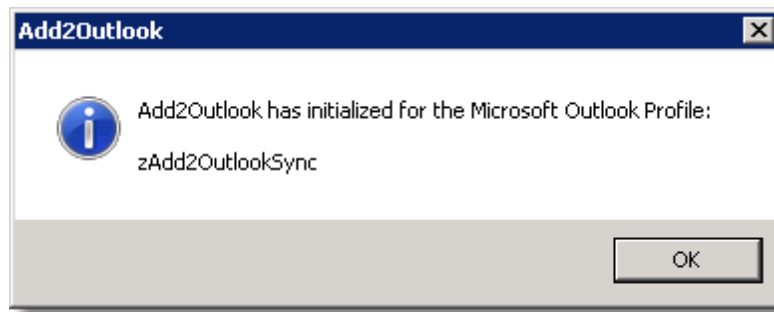
See above that the Add2Outlook Add-in is Inactive? To activate it, select **Manage Com Add-ins** at the bottom and press **Go...**



Enable the Add2Outlook Com Add-in by putting a check box next to the **Add2Outlook Add-in** and press **OK**.



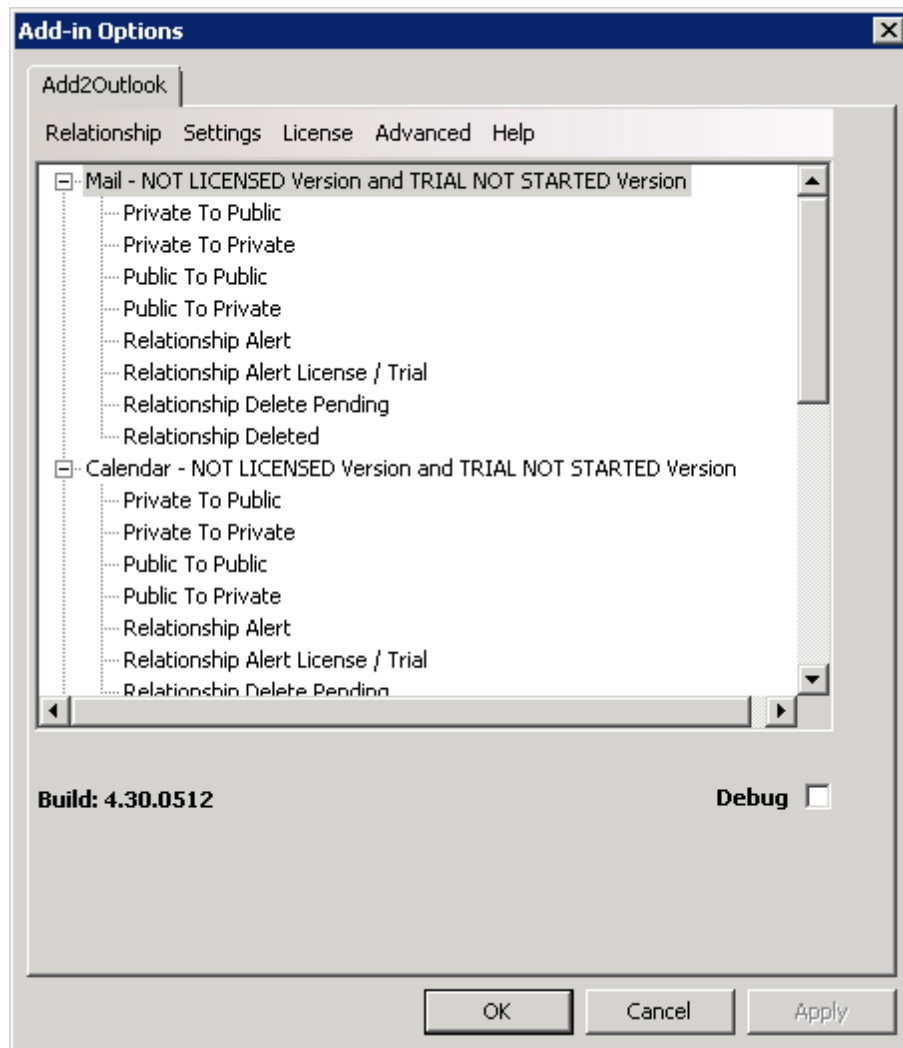
If the Add2Outlook Com Add-in loads, it will prompt you to install the Add-in. It is from a trusted source (Advantage International, our parent company) with a valid trust certificate, so select Install. If the Com Add-in was active when Outlook loaded, it would present you with the following above screen when opening Outlook.



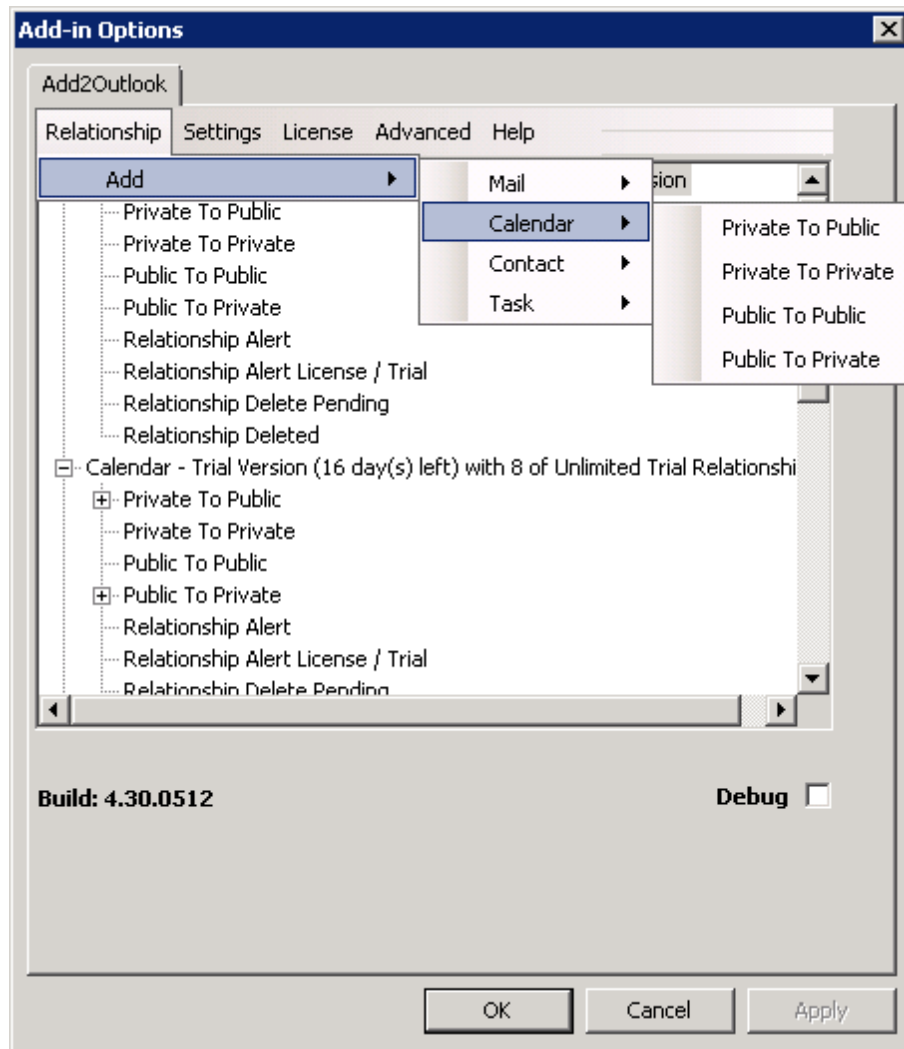
Once it is installed, a screen confirming that the program was installed for that profile is shown. Press **OK** to continue.

Now that the Com Add-in has installed correctly, and it is active for the current profile, we will go to the Add2Outlook Console to create a relationship.

4.3 Making Relationships



1. Select **File** from the top drop down, **Options and Add-ins** and **Add-in Options**.



2. Select **Relationship** from the main menu. The types of relationships supported are Calendar, Contacts and Tasks. In the following example, we will select to Add a Calendar relationship from public-to-private. Select **Add** then **Calendar**. Add2Outlook will work with most combinations of personal calendars and does not have to be the user's default calendar.

For your application, you can pick the type of relationship you are trying to create:

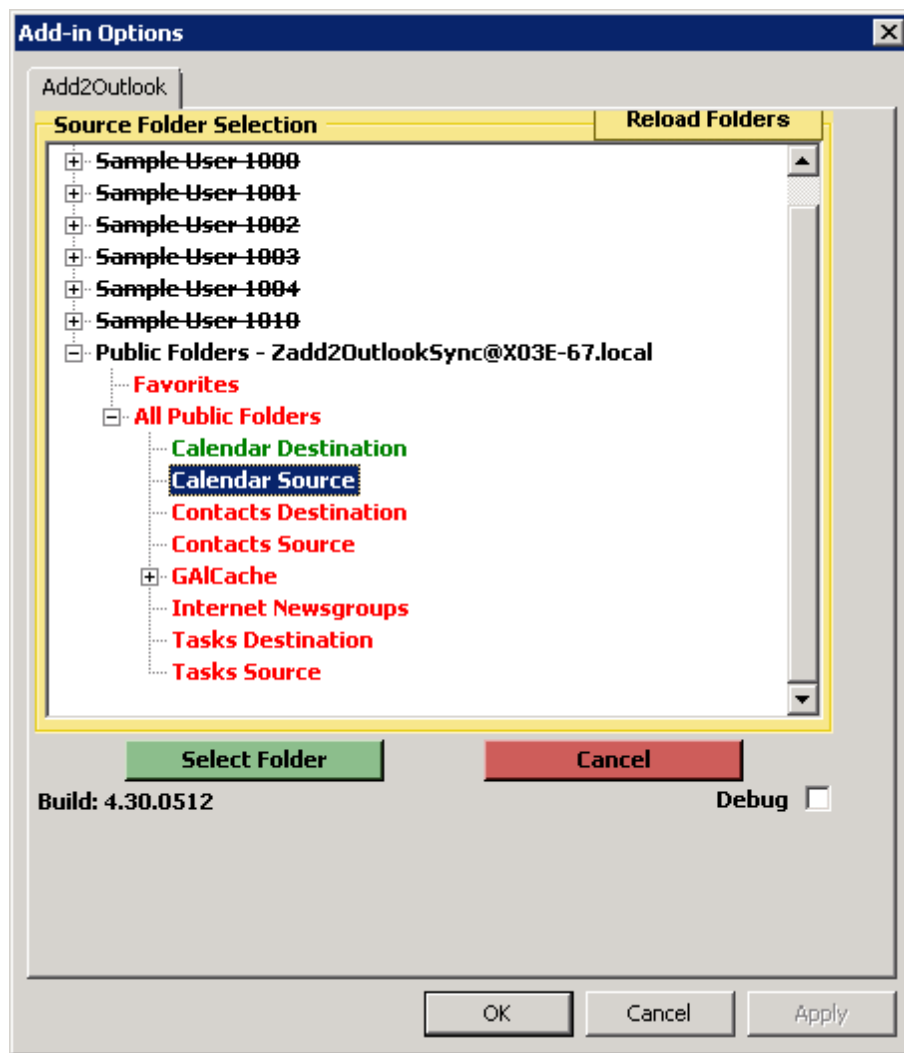
- Public-to-Private – From a Public folder to a Private folder.
- Private-to-Public – From a Private folder to a Public folder.
- Private-to-Private – From one user's delegated server-side mailbox to another user's server-side mailbox.

Let's assume for this example you are going to make a public-to-private relationship.

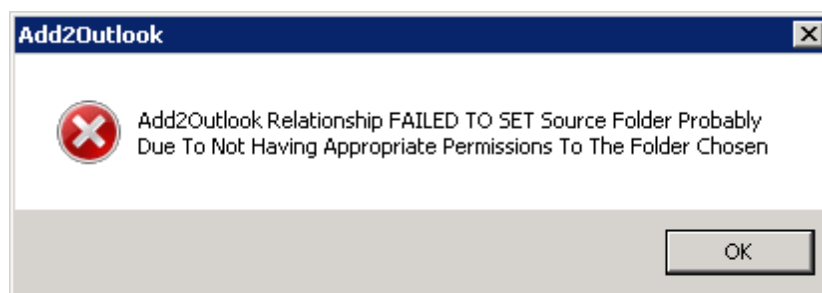
The select folder is the source folder (ex: calendar folder for a calendar relationship) to be utilized in the relationship.

The screenshot shows the 'Add2Outlook' application window. At the top, the title bar reads 'Add2Outlook'. Below it, there are three labels with corresponding input fields: 'Relationship Name:' followed by an empty text box; 'Relationship Type:' followed by a dropdown menu showing 'Calendar'; and 'License Address:' followed by a text box containing '/o=First Organization/ou=First Administrative Group/cn'. Below these fields are two columns. The left column is headed 'Source' and has a 'Select' button to its right. The right column is headed 'Destination' and has a 'Select' button to its right. Both columns contain two empty text boxes. At the bottom of the window, there is a green 'Add' button and a red 'Cancel' button. In the bottom left corner, it says 'Build: 4.30.0512'. In the bottom right corner, there is a 'Debug' label followed by an unchecked checkbox.

3. Click on **Select** to pick the folders for the source folder.



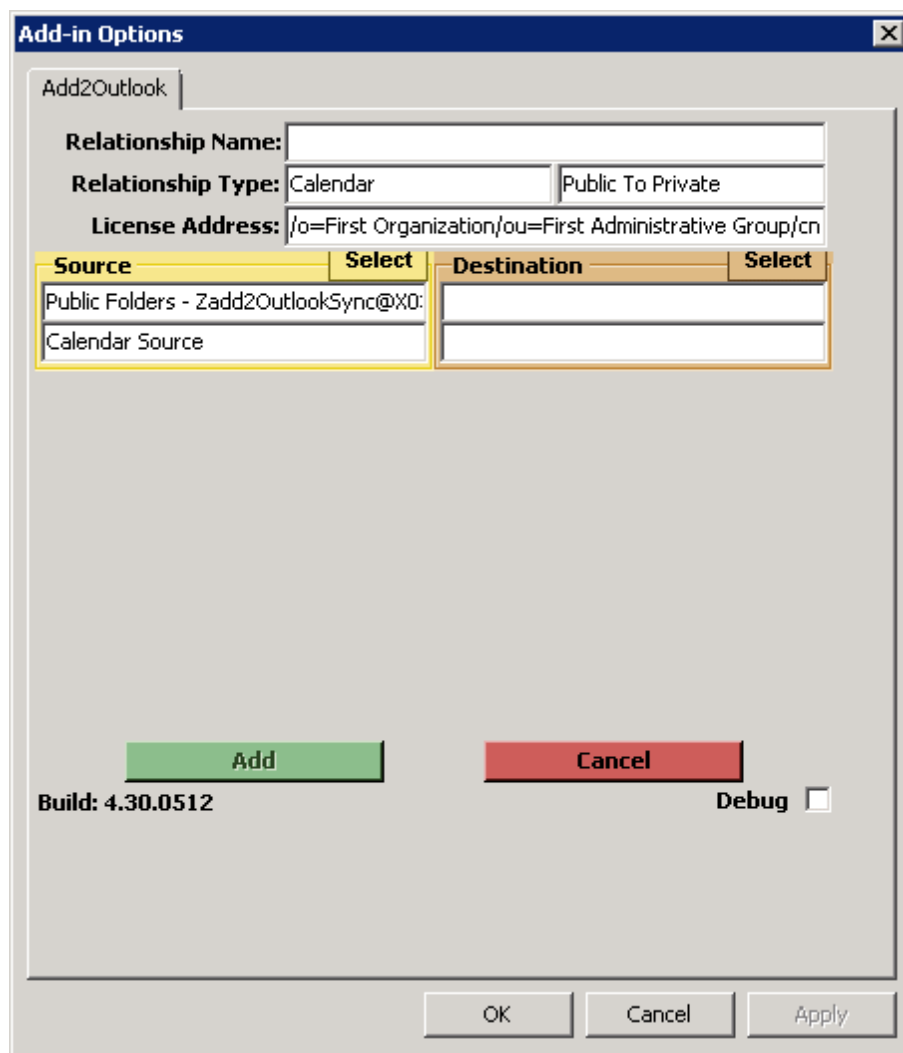
4. Once selected, click **Select Folder**.



If you do not have the appropriate permissions to access the folder, you will get the above message. This means that the account you are logging in and setting up relationships to and from does not have

“Owner” and Folder Contact permissions to the folder.

You can give those permissions from within Outlook or from within Exchange. See Folder Permissions section in the prior section of the Guide. Once you are done with the permissions, or you have already given the appropriate permissions, you will be able to pick both the source and destination folders to see the following screen:



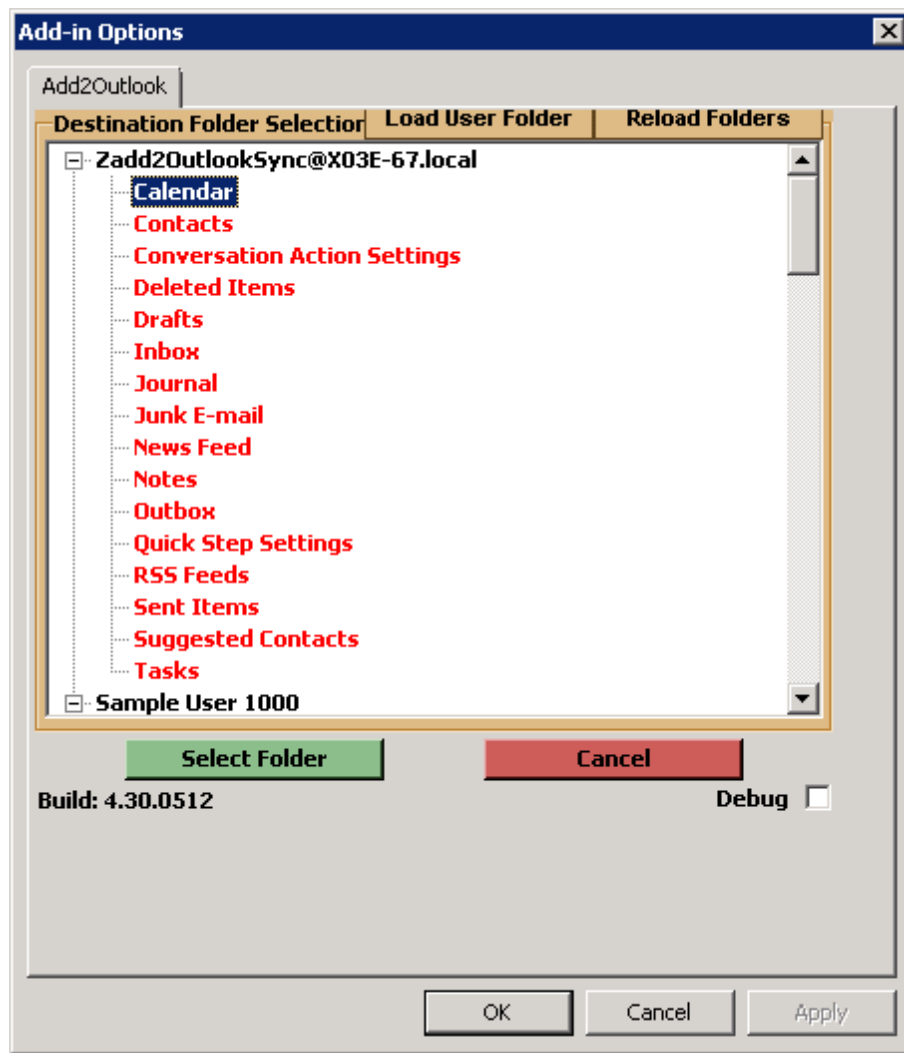
- NEW relationship. Usually there is only one mailbox (the user's) to choose from. If the user has been given delegation to another user's mailbox and the mailbox has been opened in this profile, either mailbox can be the source or the destination.

Note: If the folders are green, the user has the proper permissions to connect to the folders. If the folders are red, the user does not have the appropriate permissions to connect to the folder. If the folder you are trying to replicate to or from is not green, you (or your Exchange Administrator) will have to give yourself the appropriate permissions as outlined in the prior Prerequisites section.

DESTINATION

The select folder is the destination folder (i.e. calendar folder for a calendar relationship) to be utilized in the relationship.

1. Click **Select** to pick the folders for the source folder.



2. Once selected, click **Select Folder**.

The image shows a Windows-style dialog box titled "Add-in Options" with a close button (X) in the top right corner. The dialog has a tab labeled "Add2Outlook". Inside, there are several fields and buttons:

- Relationship Name:** An empty text box.
- Relationship Type:** Two dropdown menus. The first is set to "Calendar" and the second is set to "Public To Private".
- License Address:** A text box containing the value "/o=First Organization/ou=First Administrative Group/cn".
- Source and Destination Selection:** Two side-by-side sections. Each has a header with "Source" or "Destination" and a "Select" button. Below each header is a list box. The Source list box contains "Public Folders - Zadd2OutlookSync@X0:" and "Calendar Source". The Destination list box contains "Zadd2OutlookSync@X03E-67.local" and "Calendar".
- Buttons:** A green "Add" button and a red "Cancel" button are positioned in the middle. At the bottom right, there are "OK", "Cancel", and "Apply" buttons.
- Build and Debug:** The text "Build: 4.30.0512" is on the bottom left, and "Debug" with an unchecked checkbox is on the bottom right.

You have specified both the source and the destination folders for synchronization. This means that anything made in the source will be synced to the destination.

3. Click **Add**.

Add-in Options

Add2Outlook

Relationship Name: Public Folders - Zadd2OutlookSync@X03E-67.local - Cal

Relationship Type: Calendar Public To Private

License Address: /o=First Organization/ou=First Administrative Group/cn

Source	Destination
Public Folders - Zadd2OutlookSync@X0:	Zadd2OutlookSync@X03E-67.local
Calendar Source	Calendar

Parameters

Place Text Before ☒ or After ☐ **Advanced Parameters**

Subject or File As With: Pub

Sync Range From Today: 60 **Prior:** 30 **Do Not Copy Private:** ☐

Resolutions **Set Dest. Reminder:** ☐

Conflict: Always Replace Item In Source Folder

Copied: Synchronize Changes Back To Source Item

Source Deleted: Delete Destination Item

Dest. Deleted: ReCopy The Source Item

Save **Cancel**

Build: 4.30.0512 **Debug** ☐

OK **Cancel** **Apply**

Next we will proceed to relationship rules that specify the rules of synchronization during the replication interval.

When you make a relationship, the program populates the option with many common settings. The default options are bidirectional on edits and unidirectional on deletes. What this means is that the zadd2outlooksync calendar will be populated with the public calendar and we have added that the calendar items from the public be pre-populated with the text Pub. The system automatically puts a ":" after whatever you place there, (no quotes) so the Subject in our example would say Pub: Normal Subject line.

This placement of text assists in telling the user where the item came from. If it was a private relationship, you could use the person's initials or first name or first initial last name. We suggest keeping the auto place text as short as possible to be easily viewed in a mobile device.

Add2Outlook tests for duplicate relationships! With this version, you cannot create the same relationship twice, as this will cause duplicates in the destination since there would be two different relationships on the same folders. Since Add2Outlook calendar relationships have their own unique identifier; Add2Outlook considers successive iterations of the same relationship to be separate relationships. The "duplicate" appointments are not actually duplicates; the program is operating as instructed. We suggest in a live

environment, if a relationship needs to be changed or modified, edit the existing relationship or delete and recreate it.

To change the options on an existing relationship, double-click the relationship in the console (or right-click the Relationship and click **Edit**).

Note: From the Relationship Edit screen dialog, you cannot change the original Mailbox and Folders for both the source and destination; however, you can change the Rules of the Relationship. The option that is not available on editing is having the ability to recopy any Existing Items from the source. To do this you need to delete the relationship and recreate it.

To change the mailbox folders on a relationship that will not be recreated, Delete the relationship, and start again.

You can edit all items of the relationship before the save. To edit the relationship after the save, change the existing relationship options via the Relationship Edit menu.

Continue to the next section for a more thorough explanation of each replication rule.

4.4 Recommended Relationship Settings

Many users have questions about the most common values of the settings for the type of relationship as they set up a relationship. Below are some typical values of the relationship settings for the most common types of relationships.

Tip: The most important thing to think about when setting up a relationship is to concentrate on which is the MASTER (original calendar item) and which is the Slave (copied calendar item). Each relationship is one way, made in the source and copied or synced to a destination. Each relationship can be unidirectional on information flow - where information is only flowing one way.

Conversely, each relationship can be bidirectional, where information changed in the destination can be synced back to modify the original source. Bidirectional changes can be for edits AND/OR deletes. If someone edits the synced destination item, it can sync back to the source. If someone deletes the synced item, it can delete the original if desired, and if it deletes the source, it will therefore delete all other copies.

If there is more than one master copy on a particular folder, with many relationships (one to many), and two users change the item during the same sync cycle, then one of the changes will be overwritten. This does not happen often, but can happen. Some of the rules of the relationship will effectively allow you to do this. For example, if going from a public to multiple private calendars, you can set the Conflict resolution to overwrite the Source and Copied resolution to sync changes back to the Source if destination item is changed in more than one relationship. If Add2Outlook is operating off the same public calendar and two users change the item and both of them are set to overwrite the source item, someone's changes will be lost.

If you keep this in mind when selecting the relationship settings, it will assist you in selecting the right relationship options that satisfy your particular business requirement.

The program has optional rules to not copy items marked "private" from the source to the destination. These settings are only applicable from a private to a public or private-to-private folder, as there is no such thing as a "private public calendar" item.

See the following screenshots for examples and descriptions of typical relationship settings. Screenshots are of calendar relationships which include all possible settings. Task and Contact relationships contain either the same settings or a subset. All settings for calendar relationships apply to those types as well.

Folder Publication and Folder Aggregation (One-way)

Folder Publication (One-way)

The screenshot shows the 'Add-in Options' dialog box for 'Add2Outlook'. The 'Relationship Name' is 'Zadd2OutlookSync@X03E-67.local - Calendar To Public'. The 'Relationship Type' is 'Calendar' and 'Private To Public'. The 'License Address' is '/o=First Organization/ou=First Administrative Group/cn'. The 'Source' is 'Zadd2OutlookSync@X03E-67.local' and 'Calendar'. The 'Destination' is 'Public Folders - Zadd2OutlookSync@X03E-67.local' and 'Calendar Source'. The 'Parameters' section includes 'Place Text Before' (selected) or 'After', 'Subject or File As With: Pub', 'Sync Range From Today: 60', 'Prior: 30', 'Do Not Copy Private: [unchecked]', 'Resolutions' (Conflict: Always Replace Item In Destination Folder, Copied: Overwrite Changes, Source Deleted: Delete Destination Item, Dest. Deleted: ReCopy The Source Item), and 'Advanced Parameters' (Set Dest. Reminder: [unchecked]). The 'Build' is 4.30.0512 and 'Debug' is checked. Buttons for 'Save', 'Cancel', 'OK', 'Cancel', and 'Apply' are at the bottom.

This is the most common configuration. Publication of a source folder consists of a one-way relationship where edits and deletions in the source folder are mirrored in the destination. In the destination folder, edits and deletions of copied items do not affect the source folder. Destination edits and deletions are undone on the next synchronization, replacing the affected items with fresh copies of the original items from the source folder. This enforces a common view of the source folder contents. The term publication implies that the owner of the destination folder has no control over the items residing in the source folder.

In the example shown, the relationship is from a public calendar to a user.

- If an appointment in the public folder is edited, the copy in the user's folder will be replaced with a new copy of the changed appointment. Interim changes to the user's old copy, if any, will be

discarded (conflict resolution).

- If the user edits their copy of a public folder appointment, changes to the user's copy will be discarded and replaced with a new copy of the original item from the public folder.
- If an appointment is removed (deleted or moved) from the public folder, its copy will be removed from the user's folder.
- If the user removes their copy of a public folder appointment, a new copy of the original item from the public folder will be created.

This relationship is popular because the user cannot accidentally delete copied items. The destination folder therefore always reflects the entire contents of the source folder. This makes it easy to verify the correct operation of synchronization.

All of these behaviors are unaffected by the location of source and destination folder, public or private, or the folder type, calendar, contact or task.

Technical Details: The only option which is affected by the location of the source and destination folders is the Skip Private Items setting, which only affects items that are marked private in the source folder. Since items in a public folder cannot be marked private in Outlook, this option does not apply to public-to-private and public-to-public relationships, but does in the private-to-public relationship above.

Folder Publication with Pruning (Partial One-way)

Folder Publication with Pruning (One-way with “Do Nothing” destination deletions)

Add-in Options

Add2Outlook

Relationship Name: Public Folders - Zadd2OutlookSync@X03E-67.local - Cal

Relationship Type: Calendar Public To Private

License Address: /o=First Organization/ou=First Administrative Group/cn

Source

Public Folders - Zadd2OutlookSync@X03E-67.local

Calendar Source

Destination

Zadd2OutlookSync@X03E-67.local

Calendar

Parameters

Place Text Before ☒ or After ☐ **Advanced Parameters**

Subject or File As With: Pub

Sync Range From Today: 60 **Prior:** 30 **Do Not Copy Private:** ☐

Resolutions

Conflict: Always Replace Item In Destination Folder

Copied: Overwrite Changes

Source Deleted: Delete Destination Item

Dest. Deleted: Do Nothing

Save **Cancel**

Build: 4.30.0512 **Debug** ☒

OK **Cancel** **Apply**

This configuration is less common. Because items can be removed from the destination folder without creating a new copy from the source, once an item is deleted it can never be synchronized again. Removing destination copies in this manner is called pruning.

Like regular publication, publication with pruning consists of one-way relationship(s) where edits and deletions in the source folder are mirrored in the destination. Also like publication, edits and deletions of copied items do not affect the source folder. Destination edits are still undone on the next synchronization as well.

Where publication with pruning differs from publication is that destination deletions are not undone on the next synchronization. Instead, the source item remains unchanged but is no longer copied to the destination. This allows the user to "get rid of" certain items without affecting any other folder.

In the example shown, the relationship is from a public calendar to a user.

- If an appointment in the public folder is edited, the copy in the user's folder will be replaced with a new copy of the changed appointment. Interim changes to the user's old copy, if any, will be discarded (conflict resolution).

- If the user edits their copy of a public folder appointment, changes to the user's copy will be discarded and replaced with a new copy of the original item from the public folder.
- If an appointment is removed (deleted or moved) from the public folder, its copy will be removed from the user's folder.
- If the user removes their copy of a public folder appointment, no further copies will be made of that appointment to this user.

This relationship is used for various reasons, such as limitations on space in mobile devices, or to allow users to clear space on their calendars taken by synchronized meetings that they will not be attending.

The difficulty with this relationship is that the occasional accidental deletion of an item necessitates either a manual, unsynchronized copy of the item be placed in the user's folder, or that the relationship needs to be deleted and rebuilt in order to bring back the item.

Another drawback is that the destination usually does not contain the exact contents of the source folder, making verification of correct synchronization difficult.

For these reasons, we recommend that you only use this configuration if you are certain it is necessary.

Folder Participation and Folder Grouping (Two-way)

Folder Participation (Two-way)

Add-in Options

Add2Outlook

Relationship Name: Public Folders - Zadd2OutlookSync@X03E-67.local - Cal

Relationship Type: Calendar Public To Private

License Address: /o=First Organization/ou=First Administrative Group/cn

Source	Destination
Public Folders - Zadd2OutlookSync@X0:	Zadd2OutlookSync@X03E-67.local
Calendar Source	Calendar

Parameters

Place Text Before ☒ or After ☐ **Advanced Parameters**

Subject or File As With: Publ

Sync Range From Today: 60 **Prior:** 30 **Do Not Copy Private:** ☐

Resolutions **Set Dest. Reminder:** ☐

Conflict: Always Replace Item In Source Folder

Copied: Synchronize Changes Back To Source Item

Source Deleted: Delete Destination Item

Dest. Deleted: Delete Source Item

Save **Cancel**

Build: 4.30.0512 **Debug** ☒

OK **Cancel** **Apply**

This is a less common configuration because the user can accidentally delete items from the source folder, causing confusion. For a more common configuration that still allows shared editing control, see the section below, Folder Participation with Restricted Deletion.

Participation consists of a two-way relationship where edits and deletions in either the source or destination folder are mirrored in the other. The term participation implies that the owner of the destination folder has at least some control over the items residing in the source folder, not just their copies.

Note: participation in a source folder is different than making two folders equivalent. The folder participation configuration is a single relationship, which only includes the contents of the source folder in the destination folder, not vice-versa. The original contents of the destination folder, which were there prior to synchronization, are not brought to the source folder. If you want to make the folders equivalent so that both folders contain the combined contents of the two, you will need another relationship going from the destination folder to the source (called a mutual relationship).

In the example shown, the relationship is from a public calendar to a user.

- If the user edits their copy of a public folder appointment, the original appointment in the public

folder will be replaced with the changed appointment from the user. Interim changes to the original item in the public, if any, will be discarded (conflict resolution). Even though the appointment in the source has been replaced, it is still considered the original item, not a copy.

- If an appointment in the public folder is edited, the copy in the user's folder will be replaced with a new copy of the changed appointment.
- If an appointment is removed (deleted or moved) from the public folder, its copy will be removed from the user's folder.
- If the user removes (deletes or moves) their copy of a public folder appointment, the original item from the public folder will be deleted.

Folder Participation with Restricted Deletions (Partial Two-way)

Folder Participation with Restricted Deletions

Add-in Options

Add2Outlook

Relationship Name: Public Folders - Zadd2OutlookSync@X03E-67.local - Cal

Relationship Type: Calendar Public To Private

License Address: /o=First Organization/ou=First Administrative Group/cn

Source	Destination
Public Folders - Zadd2OutlookSync@X03E-67.local	Zadd2OutlookSync@X03E-67.local
Calendar Source	Calendar

Parameters

Place Text Before ☒ or After ☐ **Advanced Parameters**

Subject or File As With: Pub

Sync Range From Today: 60 **Prior:** 30 **Do Not Copy Private:** ☐

Resolutions

Conflict: Always Replace Item In Source Folder

Copied: Synchronize Changes Back To Source Item

Source Deleted: Delete Destination Item

Dest. Deleted: ReCopy The Source Item

Save **Cancel**

Build: 4.30.0512 **Debug** ☒

OK **Cancel** **Apply**

This is the recommended and most common configuration of Folder participation because the user cannot accidentally delete items from the source folder.

This form of sharing a source folder consists of a two-way relationship where edits in either the source or destination folder are mirrored in the other. Deletions from the source folder are reflected in the destination, but deletions in the destination do not affect the source. Instead, a new copy of the source item is created in the destination.

The term participation implies that the owner of the destination folder has at least some control over the items residing in the source folder, not just the copies in the destination. In this case, the control is the ability to edit but not to delete.

In the example shown, the relationship is from a public calendar to a user.

- If the user edits their copy of a public folder appointment, the original appointment in the public folder will be replaced with the changed appointment from the user. Interim changes to the original item in the public, if any, will be discarded (conflict resolution). Even though the appointment in the source has been replaced, it is still considered the original item, not a copy.
- If an appointment in the public folder is edited, the copy in the user's folder will be replaced with a new copy of the changed appointment.
- If an appointment is removed (deleted or moved) from the public folder, its copy will be removed from the user's folder.
- If the user removes (deletes or moves) their copy of a public folder appointment, a new copy of the original item from the public folder will be created.

This relationship is popular because the user cannot accidentally delete items in the source. The destination folder therefore always reflects the entire contents of the source folder. This makes it easy to verify the correct operation of synchronization.

Other Variations

Folder Publication with Preserved Destination Edits

Add-in Options

Add2Outlook

Relationship Name: Public Folders - Zadd2OutlookSync@X03E-67.local - Cal

Relationship Type: Calendar Public To Private

License Address: /o=First Organization/ou=First Administrative Group/cn

Source	Destination
Public Folders - Zadd2OutlookSync@X0:	Zadd2OutlookSync@X03E-67.local
Calendar Source	Calendar

Parameters

Place Text Before ☒ or After ☐ **Advanced Parameters**

Subject or File As With: Publ

Sync Range From Today: 60 **Prior:** 30 **Do Not Copy Private:** ☐

Resolutions **Set Dest. Reminder:** ☐

Conflict: Always Replace Item In Destination Folder

Copied: Preserve Changes And Make Source Item Copy

Source Deleted: Delete Destination Item

Dest. Deleted: ReCopy The Source Item

Save **Cancel**

Build: 4.30.0512 **Debug** ☒

OK **Cancel** **Apply**

This is a less common configuration that allows a user to make edits to the destination copies. The edited item is preserved and a new copy of the original item is made in the destination.

This is not a recommended configuration because frequently the synchronized item cannot be told apart from the non-synchronized copy with the user's edits. Sometimes users mistake this for duplication, especially if further edits are made to the synchronized version of the item, resulting in an additional copy from the source.

If this configuration is chosen, it is recommended to make the edited copy distinguishable by, for example, changing the message subject field.

Folder Participation with Deletion Marking in the Source

The image shows the 'Add-in Options' dialog box for 'Add2Outlook'. The dialog has a title bar with a close button. Inside, there's a tab labeled 'Add2Outlook'. The main area contains several fields and sections:

- Relationship Name:** Public Folders - Zadd2OutlookSync@X03E-67.local - Cal
- Relationship Type:** Calendar (selected), Public To Private
- License Address:** /o=First Organization/ou=First Administrative Group/cn
- Source:** Public Folders - Zadd2OutlookSync@X0: (selected), Calendar Source
- Destination:** Zadd2OutlookSync@X03E-67.local (selected), Calendar
- Parameters:**
 - Place Text Before** (selected) or **After** (radio buttons)
 - Subject or File As With:** Pub
 - Sync Range From Today:** 60, **Prior:** 30, **Do Not Copy Private:** (checkbox)
 - Resolutions:**
 - Conflict:** Always Replace Item In Source Folder (dropdown)
 - Copied:** Synchronize Changes Back To Source Item (dropdown)
 - Source Deleted:** Delete Destination Item (dropdown)
 - Dest. Deleted:** Mark Item "Deleted" (dropdown)
- Buttons:** Save (green), Cancel (red)
- Build:** 4.30.0512, **Debug:** (checked checkbox)
- Footer Buttons:** OK, Cancel, Apply

This is another less common configuration that allows a user to delete an item from the destination folder. Add2Exchange then marks the original item in the source folder with the tag "Deleted" and does not copy the item to that user again. If other relationships exist from the source folder, they will also copy the "Deleted" tag to their destinations.

This configuration can allow users to "vote" that an item be deleted from the source folder, while maintaining centralized control of actual deletion of items from the source folder.

Public-to-Private Relationship TIP: Recommended Defaults

Add-in Options

Add2Outlook

Relationship Name: Public Folders - Zadd2OutlookSync@X03E-67.local - Cal

Relationship Type: Calendar Public To Private

License Address: /o=First Organization/ou=First Administrative Group/cn

Source	Destination
Public Folders - Zadd2OutlookSync@X03E-67.local	Zadd2OutlookSync@X03E-67.local
Calendar Source	Calendar

Parameters

Place Text Before ☒ or After ☐ **Advanced Parameters**

Subject or File As With: Pub

Sync Range From Today: 60 **Prior:** 30 **Do Not Copy Private:** ☐

Resolutions

Conflict: Always Replace Item In Destination Folder

Copied: Overwrite Changes

Source Deleted: Delete Destination Item

Dest. Deleted: ReCopy The Source Item

Save **Cancel**

Build: 4.30.0512 **Debug** ☒

OK **Cancel** **Apply**

For syncing without any possibility of loss of a change made, it is always best to have one master, and unidirectional flow of information, from source to destination. This way you can limit with Client Access Control to the source to just those who you want to be able to edit the items. Add2Outlook will execute the relationships in the order they sync, so the program can easily inadvertently overwrite the master from two sources and lose someone's changes. Add2Outlook will provide the ability to do both unidirectional data flow or bidirectional data flow, depending on the settings selected below. The system is powerful enough to allow for changes to sync back to the source item, and then that change synced to any other replicas, again depending on the options specified below.

Conflict Resolution: if you want the public to be the master item, then you would select **"Always Replace Item In Destination Folder"**. This means any changes of an item which got made in the public and Synced to the private would be overwritten each time by the public no matter what changes they made to their copy. Be sure to change the Copied resolution option below to **"Overwrite Changes"** (the next option below) so any changes are overwritten by the Source item. This selection is unidirectional on edits (changes only go from public-to-private) and the Source item in the public is always the master copy.

If you want the public to be able to be updated with changes from a user's copy of the item, you would select **"Always Replace Item In Source Folder"**, and in the next option Copied Resolution, select to

“Synchronize Changes Back To Source Item”. When making a new relationship, this option is the default way the relationship is made, but you can change it if you wish. This option is bidirectional on edits, where the item can be edited in either location and it will attempt to update the source and every other destination of the relationship.

Copied Resolution: Again, to completely avoid the possibility of data loss by some user, the best practice is to have one master, but again, it depends on what you want.

To have one way syncing, the Copied Resolution must be set to ***“Always Overwrite Any Changed Destination Copy”***.

Source Item Delete Resolution: Since the Rules of the Relationship send the information where you tell it, you should either delete it to clean up the folder or mark the item deleted so everyone knows what is going on.

Tip: The best practices for a calendar appointment is to train your users to edit the subject with ***“Rescheduled to...”*** or ***“Canceled”*** so other users know of the changes without it just disappearing. If you select Do Nothing, the item will remain in the destination folders but never get replicated again. It will be an orphan item.

Deleting the Destination item is recommended, since it seems everyone wants a calendar free of deleted or canceled appointments.

Private-to-Public Relationship Tip: Recommended Defaults

Add-in Options

Add2Outlook

Relationship Name: Zadd2OutlookSync@X03E-67.local - Calendar To Public

Relationship Type: Calendar Private To Public

License Address: /o=First Organization/ou=First Administrative Group/cn

Source	Destination
Zadd2OutlookSync@X03E-67.local	Public Folders - Zadd2OutlookSync@X03E-67.local
Calendar	Calendar Source

Parameters

Place Text Before ☒ or After ☐ **Advanced Parameters**

Subject or File As With: Za2OSync

Sync Range From Today: 60 **Prior:** 30 **Do Not Copy Private:** ☐

Resolutions **Set Dest. Reminder:** ☐

Conflict: Always Replace Item In Source Folder

Copied: Synchronize Changes Back To Source Item

Source Deleted: Delete Destination Item

Dest. Deleted: ReCopy The Source Item

Save **Cancel**

Build: 4.30.0512 **Debug** ☒

OK **Cancel** **Apply**

Bidirectional on edits, unidirectional on deletes.

Conflict Resolution: In the picture above, the item is made in the private and is the original master. The settings above are set so that the item can be changed in the public and brought back to the user's private folder.

Copied Resolution: This setting is set to change the item in the private if the item changes in the public. An example of this kind of relationship is a sales manager who has the salespeople's calendar replicated to a public, then makes notes and comments in the public and have it replicate back to the original user. Any changes to the destination item in the public by anyone with client access control will update the original item.

If source item is deleted, delete the destination item.

If the destination item is deleted from the public, it will recopy from the private.

Add-in Options

Add2Outlook

Relationship Name: Zadd2OutlookSync@X03E-67.local - Calendar To Public

Relationship Type: Calendar Private To Public

License Address: /o=First Organization/ou=First Administrative Group/cn

Source	Destination
Zadd2OutlookSync@X03E-67.local	Public Folders - Zadd2OutlookSync@X03E-67.local
Calendar	Calendar Source

Parameters

Place Text Before ☒ or After ☐ **Advanced Parameters**

Subject or File As With: Za2OSync

Sync Range From Today: 60 **Prior:** 30 **Do Not Copy Private:** ☐

Resolutions

Conflict: Always Replace Item In Destination Folder

Copied: Overwrite Changes

Source Deleted: Delete Destination Item

Dest. Deleted: ReCopy The Source Item

Save **Cancel**

Build: 4.30.0512 **Debug** ☒

OK **Cancel** **Apply**

Bidirectional on edits, unidirectional on deletes.

This option specifies that the private item is always the master and no matter what is done to a copy of the item in the public, the private item overwrites any change and the item is recopied when deleted.

Copied Resolution: This setting is set to overwrite any changed destination item.

Conflict Resolution: Overwrite changed destination items.

Source Item Delete Resolution: Delete destination item is almost always the most common selection.

Destination Deleted: If the destination item is deleted from the public, it will recopy from the private.

Tip: Source Item Delete Resolution: If you are going to select this to delete destination, it is best practice to open the item and edit the subject so everyone knows of the change and things don't just start deleting.

The best practices is to have your users edit the subject with ***"Rescheduled to ..."*** or ***"Canceled"***.

Delete destination item is normal, but nice to know what happened to a calendar item, for example if it was moved to another date.

Private-to-Public Relationship Tip: Recommended Defaults when you want to have users edit the Destination public and write back to the source.

Conflict Resolution: Always replace item in the source folder.

Copied Resolution: Synchronize changes back to the source item.

Source Item Delete Resolution: Mark the item deleted or edit the subject.

Private-to-Private Relationship Tip: Recommended Defaults.

Add-in Options

Add2Outlook

Relationship Name: Zadd2OutlookSync@X03E-67.local - Calendar To Sample

Relationship Type: Calendar Private To Private

License Address: /o=First Organization/ou=First Administrative Group/cn

Source	Destination
Zadd2OutlookSync@X03E-67.local	Sample User 1000
Calendar	Calendar

Parameters

Place Text Before ☒ or After ☐ **Advanced Parameters**

Subject or File As With: za2OSync

Sync Range From Today: 60 **Prior:** 10 **Do Not Copy Private:** ☒ **Set Dest. Reminder:** ☐

Resolutions

Conflict: Always Replace Item In Destination Folder

Copied: Overwrite Changes

Source Deleted: Delete Destination Item

Dest. Deleted: Do Nothing

Save **Cancel**

Build: 4.30.0512 **Debug** ☒

OK **Cancel** **Apply**

Conflict Resolution: Usually the place you created the appointment is the master, so this option should be to replace destination. This way a user does not change another's original appointment. Since a private-to-private relationship is often one to many, replace the destination is the preferred option so the

original private calendar is the master. If many users can edit the original, as is the case where the assistants of a doctor can all edit, consider a private-to-public relationship instead. Always Replace Item In Source Folder is not recommended.

Copied Resolution: It should be always overwrite or untie and create a new tied item if changes are to be saved in the destination item. The master is still the original private, and editing that is not recommended. Synchronize Changes Back To Source Item – again, not recommended.

Source Item Delete Resolution: Delete Destination Item is ok for a clean calendar, but better is again to mark the item deleted or edit the subject.

Destination Item Deleted Resolution: Either to do nothing so the other user can prune the appointments they don't want or Recopy.

4.5 Synchronization Rules

Auto Populate Subject With: “Auto Population” is a fancy technical term which means automatically put the text you enter into the subject line of an appointment.

- This option is most often used to identify the calendar it came from, such as “public” or the creator of appointment with initials, last name or full name. In some scenarios the words “Personal” or “Work” is appropriate.
- This is used most often to identify the creator of the appointment with initials, last name or full name.

Synchronize How Many Days: This option specifies what date range you want the program to synchronize from and until.

- Set the number of days in advance to synchronize changes.
- Set the number of prior days to synchronize changes.
- Scan Ahead Dates options. This option tells you how many days or weeks to replicate both in the future.
- Prior: The program will replicate from today and however many days specified in the past.
- Future: The program will replicate from today until the timeframe specified has been reached.
- Static: The program will replicate a certain defined date.
- Scan Prior Dates options. This option tells you how many days or weeks to replicate in the past.

Tip: if reoccurring appointments are to be replicated from the source, make sure (at least for the initial sync), the start date is far enough in the past to contain the date of the first (master) reoccurring appointment of the series. Once replicated, you can change the prior days to 0.

Within each relationship you can specify the date range of each type of item you want to copy. In a calendar relationship, the date of the calendar item is used to determine if it should be copied. If the calendar item date falls within the prior date (prior to today) and post date (sliding after today) date range you specify within the relationship, it will be copied. If not, it will not be copied.

In a Task Relationship, the start and end dates are the dates used to determine if it falls within the date range specified in the relationship. If you want all tasks to be replicated, regardless of Start or End Date, you need to set both the Prior Sync Days and the Sync Ahead days to 0. This way when the replication

cycle is active, all tasks with an end date (or no end date) and any started (or not started) tasks will be copied from the source to the destination.

If you want just some of the tasks copied, such as those with a start or end date that falls within the date range you have specified within the relationship, setting the values to something other than zero would only copy those tasks falling within the range of the calculated date within the start or end date period.

Why do some items not copy? If you specify a positive number of days either in the Prior Sync days or Post (from today) Sync then in order for the task to be synchronized, it must at least have a task Due Date and that date must fall prior to or equal to the number of sync days specified in the relationship.

For Example, if you are trying to sync 5 days in advance, then the Due Date must be equal to or less than the date 5 days in the future.

If the task has a Start Date specified in the task, then the start date must be greater than or equal to the sync prior days AND the due date must be before or equal to the post sync days.

In Contact Relationships, the date fields are not necessary.

Do not copy Private items: This is a simple on/off function to either ignore or replicate source appointments marked as "Private" in the bottom right side of an Outlook appointment.

- If synchronizing from public-to-private folders, this option is not relevant since there is no such thing as a private public calendar item.

Conflict Resolution: On occasion, both the source and destination appointment in a single calendar relationship are separately edited/changed, but not deleted. When both source and destination appointments are edited, this creates a conflict requiring a resolution by one of 2 actions:

- Always replace the item in the destination folder option. This option confirms the source appointment as the primary/master appointment and will overwrite the changes which were made to the destination appointment and replace the changed destination copy with the new updated source appointment. This is the most common option for most installations.
- Always replace the item in the source folder option. This option can make the destination appointment as the primary/master appointment and will write BACK to the original source item with the updated destination appointment. Use this option sparingly, and only on one to one folder relationships.

Tip on option: "Always replace the item in the source folder" option:

If several people are using this or any of our synchronization programs, and you are going from a public folder to a private folder, it is best not to have two people with relationships that will change the master to the destination and write back to the master, because if both users do it, one user's changes will be lost.

Copied Resolution: If only the copied item (the destination copy) changes, this option specifies what to do. The Solution allows for 3 automated choices:

- Always overwrite any changes to the destination so the copy in the destination folder always matches the source appointment. This is the most common setting, but allows for the loss of changed destination information.
- Preserve the changed destination copy, and make a new copy of the original. This option will look like the destination has duplicates, but actually has two different appointments, the original and the user's changed copy of the original. If the user makes changes to the new tied copy, it will again untie that changed copy and when replication occurs will make a newly tied copy, so there will be

three in the destination. The tied copy in the destination folder will continue to change with any changes to the source appointment, but the new duplicate appointment in the destination folder will never reflect changes made to the source appointment. This option is useful for public-to-private relationships where the user makes their own notes in the tied copy, and wants to keep them as meeting notes.

- Synchronize the changes to the destination copy back to the original. This means the copy in the destination folder for that user has become the master appointment, and will Overwrite the changes in the original source. This can be a good thing and the desired operation, but is not the best idea when there are more than two users that have this setting on the same source calendar.

Tip on option: if several people are using this or any of our synchronization programs, and you are going from a public folder to a private folder, it is best not to have two people with relationships that will change the destination to master and write back to the original master, because if both users do it, one user's changes will be lost. Use this option sparingly, and only on one to one folder relationships.

Source Item Deleted Resolution: When the source item is deleted, this rule specifies what to do with the tied copy in the destination folder.

- Do nothing to the tied copy in the destination folder – leave it in the destination folder, unchanged.
- Delete the tied copy in the destination folder.
- Leave the tied copy in the destination folder, but add the word “Deleted” to the beginning of the subject line of the tied copy in the destination folder. This option is helpful if you have one to many users with relationships on the source folder because it will tell everyone what happened to the item and things don't just start disappearing.

Tip on Calendars: most users want to delete the destination item if the source item is deleted to clean up their calendars. This is a good idea in that situation. If things get changed, removed, or rescheduled; we have found it would be best to mark the item Deleted – which is an automatic feature of the product if the source item is deleted. If the appointment is rescheduled, or canceled, it would be best to train your users to edit the subject of the item and add “Rescheduled to...” (and the date) or “Canceled” to the subject so it replicates out to the appropriate people.

Destination Item Deleted Resolution: When the destination appointment is deleted, this rule specifies what to happen to the source folder item.

- Do nothing to original master item in the source folder. This option leaves the original item unchanged.
- Delete the tied copy in the source folder. – Not recommended.
- Leave the original tied copy in the source folder, but add the word “Deleted” to the beginning of the subject line of the tied copy in the destination folder.

Tip on Calendars: most users SAY they want to delete the source item if the destination item is deleted to clean up their calendars, but this is almost ALWAYS a bad idea if more than one user has this power or more than one user has a relationship from this folder (one to many). This option is only ideal if ONE user has this powerful rule set up on the folder. If the user deletes the copy of the item and it gets deleted from the source, then items can disappear accidentally and cause issues with other users. Again, the most common setting of the rule is to mark the item “Deleted” – which is an automatic feature of the product if

the source item is deleted. If the appointment is rescheduled, or canceled, it would be best to train your users to edit the subject of the item and add "Rescheduled to..." (and the date) or "Canceled" to the subject so it replicates out to the appropriate people.

Existing Item Synchronization Flag: At the time of establishing the initial relationship, this option determines what you want the program to do with existing calendar appointments in the source folder and within the specified date range.

- Replicate ALL existing appointments to the destination folder and tie for synchronization.
- Ignore existing calendar appointments and mark them so they do not get copied.

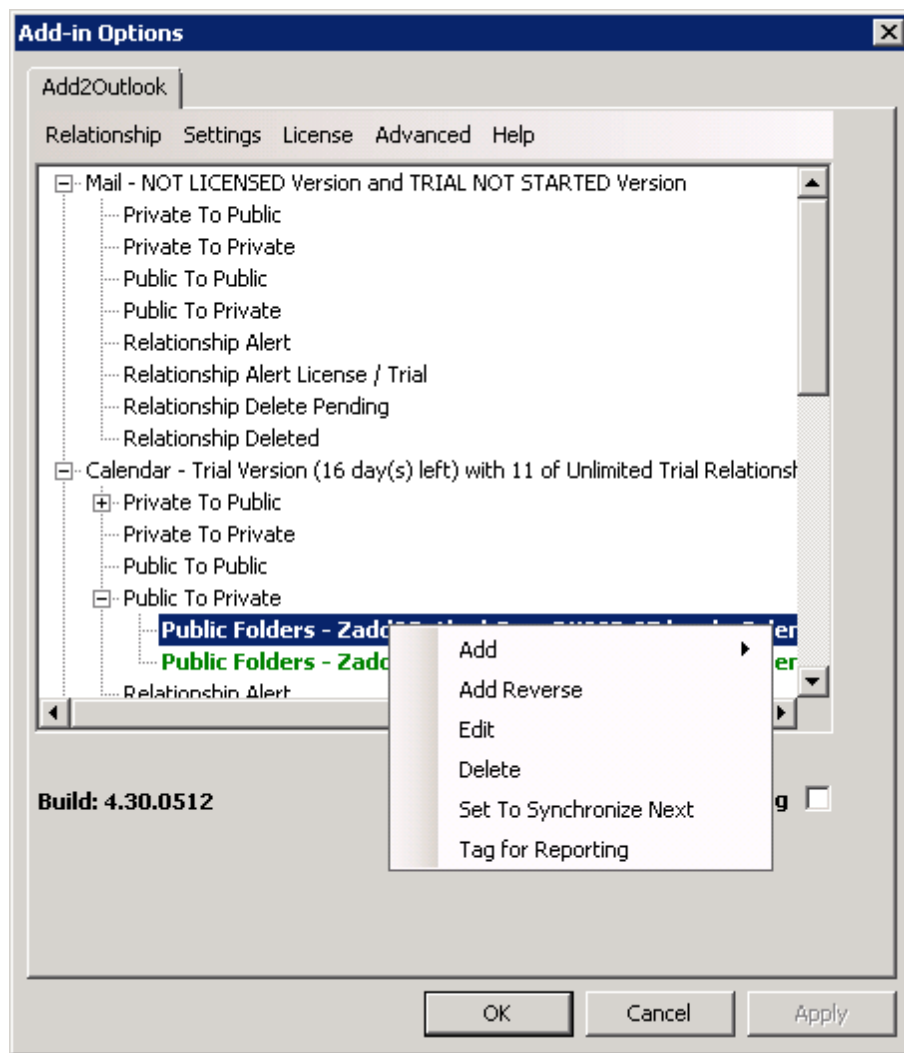
Tip: if Replicate no items is selected, Add2Outlook will only replicate/synchronize new appointments created after the calendar relationship is established. Once this option is selected, the existing items in the source will never replicate to the destination even if the relationship has been changed.

- If you find that none of the existing items have replicated and you accidentally specified Copy no items, the only way to get existing items replicated is to remove (delete) the relationship and rebuild it again.

When done with the Rules, you can change the automatic naming of the relationship, but normally you could just accept it. Press OK to save the relationship.

Want a 2-way Relationship? Creating the Reverse Relationship

After you save the first relationship, you can then make the reverse of the relationship. In our example it was a public-to-private relationship. Anything made in the public will be synced to the private. Likewise, anything made in the private will be synced to the public.



- Go back into **Add-in Options**, select the relationship you want to reverse and right click and press **Add Reverse**.

(You can always create a second relationship at any other time).

Tip: Do not make the Auto Populate the same name as the original.

Add-in Options

Add2Outlook

Relationship Name: Zadd2OutlookSync@X03E-67.local - Calendar To Public

Relationship Type: Calendar Private To Public

License Address: /o=First Organization/ou=First Administrative Group/cn

Source	Destination
Zadd2OutlookSync@X03E-67.local	Public Folders - Zadd2OutlookSync@X03E-67.local
Calendar	Calendar Source

Parameters

Place Text Before ☒ or After ☐ **Advanced Parameters**

Subject or File As With: zA2Osync

Sync Range From Today: 60 **Prior:** 30 **Do Not Copy Private:** ☐

Resolutions

Conflict: Always Replace Item In Source Folder

Copied: Synchronize Changes Back To Source Item

Source Deleted: Delete Destination Item

Dest. Deleted: ReCopy The Source Item

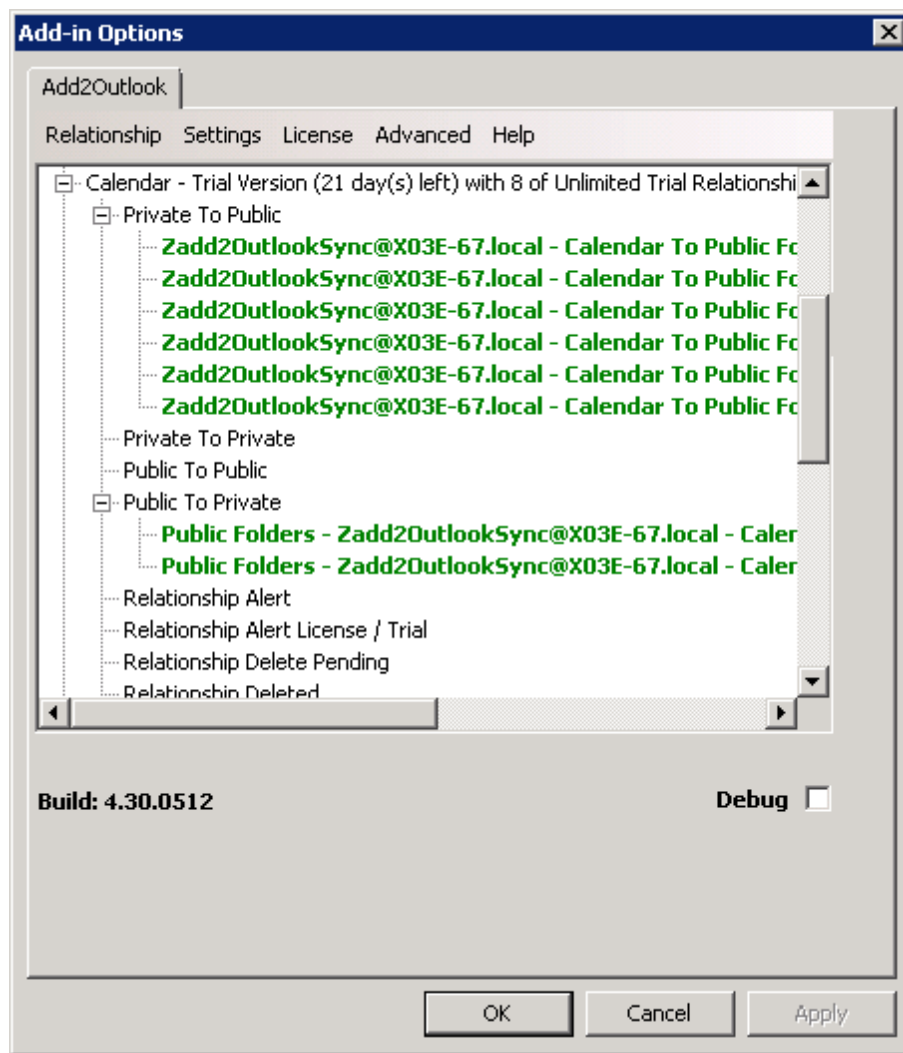
Save **Cancel**

Build: 4.30.0512 **Debug** ☐

OK **Cancel** **Apply**

- Click **Save** to create and save the reverse relationship.

When you accept the changes, you will notice you have a private-to-public and a public-to-private Relationship.



Tip: Even though there is a heading for Relationship Alert, there is no Relationship that has that status in the picture because there is no “+” next to the folder. Relationships become in alert when the user is disabled, offline or the folders are no longer available.

Select **OK** when completed in order to save the relationship. Add2Outlook is now available for Manual Online synchronization.

Tip: Add2Outlook will not synchronize with the Add2Outlook Console open and will stop synchronizing when the options page (Console) is opened. If this occurs, it will start over on the sync time when the Add2Outlook options page is closed or the Sync Now button is pressed. This is a feature so that replication does not occur on an incompletely specified relationship. Again, when you exit the Add2Outlook Console it will replicate manually or on the schedule you have chosen.

4.6 Planning Calendar Relationships

Proper planning eliminates the possibility of duplication when creating calendar relationships.

When creating calendar relationships in Add2Outlook, the goal is to have one (or more) locations where new or existing appointments are synchronized based on the relationship settings; however, prior to having the automatic Add2Outlook synchronization relationships, users could have MANUALLY copied the items from the public to their private or from their private to their public (source to destination).

Since Add2Outlook does not de-duplicate, if the user copied the items over manually and Add2Outlook synchronized, there could potentially be two of everything, or "duplicates". The next time Add2Outlook synchronized, it would still only have two copies, but one of the duplicates would be tied to the source and the other copy would not. True duplication occurs for only three reasons:

1. Users were invited to a meeting which was created in the public folder and the user also has a public-to-private relationship. This is completely normal and in fact, very handy.
2. When users have been manually copying items from the source prior to implementing Add2Outlook.
3. The Add2Outlook system is configured incorrectly with incorrect memberships or permissions.

Duplication can APPEAR to have happened because items were actually created in both places. After synchronization the two items look very similar, but were actually created separately in both places. This is not duplication. For calendar appointments, there is usually not much duplication; however, contacts and tasks duplication is more common.

In order for Add2Outlook to operate correctly without duplication, the destination folder should be cleaned out manually prior to synchronization or the various source folders should be consolidated to one folder and then de-duplicated there, before relationships are set up. Only after the contents source folder is established and contains only the set of information you want, do you set up an Add2Outlook relationship. Usually the original contents of the destination folder is either deleted or moved (preferably moved to a backup folder).

The destination folder could be cleaned out of any manually copied items after synchronization if the Add2Outlook relationship was set so that if destination items are deleted, the system would recopy the source items, but it is almost always a better idea to do the data de-duplication prior to setting up a relationship in Add2Outlook. If you do de-duplication after synchronization and set to recopy deleted destination items, both duplicate items could be deleted from the destination, and then the right one would come back after synchronization.

Private-to-Public or Public-to-Private: If users are not currently using a public folder, and you are going to make one for these purposes, then there is obviously no duplication in the source or destination. Also, if users are not currently using their private folder, and you want all the items from the public to go to their private, then again there is no duplication.

4.7 Calendar Relationship Sync Scenarios

IMPORTANT! Remove the manually copied items from the destination before synchronization.

1. You want to create a private-to-public calendar relationship or public-to-private calendar relationship and you never used a public folder before:

If there never was a public folder being used, make a new public calendar in Outlook and make sure the Service Account has the proper client "Ownership" and "Folder Contact" permissions to the new public calendar. Then create the relationship. During the next synchronization of Add2Outlook, the public folder will subsequently be filled with the user's private folder items.

2. You want to create a public-to-private calendar relationship or a private-to-public calendar relationship and your users are not using either their private or public folders:

If only the public calendar is being used for scheduling and the user's private calendars are empty, then no manual deleting is necessary prior to creating a relationship from the public to the private. Making the Add2Outlook public-to-private relationship will fill the private calendar with the appointments from the public.

3. You want to create a public-to-private or private-to-private calendar relationship and your users have been manually copying appointments from a public or private folder to their private folder:

If everything was created in the public calendar and the user manually copied the items to their private calendar, and if you make a relationship from public-to-private with those manually copied items, the destination private calendar will be filled with duplicates – duplicates of the items the user copied over manually, and the items populated by the Add2Outlook relationship. Add2Outlook does not and cannot see that the manually copied items are actually the same and de-duplicate them before it synchronizes. Add2Outlook assumes the items are originals.

Tip: If you want all the private calendar items made in one user's folder to go to another user's folder, you HAVE to make a private-to-private relationship, from source to destination.

Many users believe they can make a relationship and copy items from User 1 to a public folder and then make a relationship from the public to User 2 so that User 1's information will go to User 2. Since Add2Outlook will never copy a copy, if all User 1's items are to go to the public and User 2's folder, you will need to create at least two relationships: one from the Source (User 1) to the public folder AND one from the Source (User 1) to User 2's folder. Add2Outlook will not copy a copy, and the relationship must be built from source to destination. Three relationships are required to have the mutual relationship with the private-to-public, and one from private-to-private. To have a mutual relationship from private-to-private and a mutual from public-to-public, four relationships are required.

4. You want to make private-to-public calendar relationships and your users have manually been copying items from their private to the public calendar:

Tell your users to mark any items as "private" (a checkbox in the bottom right side of the calendar item) in their private folders. If marking every item as private is not possible in your situation, you could delete all items in the public folder or make a new public folder, give the Service Account client ownership and folder contact and set up a relationship with the relationship option to Copy No items. By selecting this option, none of the items within the date range will be copied to the new folder, only new ones added either in or after the date range when the synchronization window encompasses them.

Tip: If you create a new public calendar, the old calendar which had been filled manually should be saved for backup and eventually discarded. Be sure to let your users know since any shortcuts to the original public folder will no longer work. Also, we suggest hiding the old folder to avoid confusion.

4.8 Planning Contact Relationships

With contact relationships, duplicate entries become a concern because many users will have the same contact information in their personal folders as each other or the public folders. Before Add2Outlook was installed your group either:

- Used personal contacts and contacts imported from the Global Address List.
- Just used the public contact folder and not their private contact folders.
- Some users used their own contacts and manually copied the entire public folder down to their private.

Add2Outlook does not make an effort to discover items in the destination folders that are potential duplicates of the source items. For this reason, you need to make sure there are no potential duplicate items in your destination folders, as Add2Outlook will copy down all of the source items without regard to the existence of identical or similar records in the destination.

If you are trying to consolidate many users' personal contacts into one folder with a private-to-public relationship, often two users will have the same contact in both private contact folders. Creating a relationship from both users to one public folder will create duplicates – one from each user – and perhaps a third one which is already in the public folder. Add2Outlook cannot recognize the manually copied items are actually the same and de-duplicate them before it synchronizes. Add2Outlook assumes all items are originals.

To avoid copying users' private items in a private-to-public relationship, the first thing you would do is to mark as private any items in the private folders which we don't want synchronized. The relationship Rule Do Not Copy Private Items should be checked to prevent synchronization of those items.

Many organizations want to consolidate contacts into a central folder by setting up with one public source to many private destinations and this is a great opportunity to do this. In this scenario, it is often best to make the Source a public folder and then synchronize items to the user's private contact (destination) folders, so it is easier to manage the source items. In this scenario, the master copy of the items is in the public.

It is strongly advised to not set up a relationship and then remove duplicates **AFTERWARDS** because it is difficult to tell which item is the synchronized item. You want the Add2Outlook synchronized items, not the manual copies, so it is best to delete your duplicates before you set up the relationship. If you delete the items after, the relationship delete trigger will fire which is impossible to undo (without a restore and do over) and often causes wasted time, frustration and unintended results.

Let's walk through the entire process with an example. In this example, we have two users who each use a private contacts folder and a public folder and each folder contains duplicates of the other. The duplicates without Add2Outlook are easy to get. These duplicate records were made either by manually copying the contacts to and from the public folder or by adding an Outlook vCard all around the office. Sometimes almost everyone has the same contact entries in their private and public contact folders, but there may be a few more in one or another and one user's contact may even be more current than the same contact record of the other user.

Tip: Do all consolidation and de-duplication **BEFORE** you create a relationship!

With contact relationships, duplicate entries become a concern because your users may have the same contacts created in their personal folders as another user, or the same contacts as in the public folder contacts. Add2Outlook does not make an effort to distinguish items in the "destination" folders which are potential duplicates of the "source" items. For this reason, you need to make sure there are no potential duplicate items in your destination folders, as A2O will copy down all of the source items without regard to the existence of identical or similar records in the destination. Prior to installing, there are a few ways to remove duplication or to avoid duplications on the initial sync.

Scenario: Consolidating contacts into a single public folder and synchronizing to multiple personal folders.

The best way to do this is to export the contents of the individual users' folders to CSV files (Windows or DOS format). Reimport each file into the same personal folder, choosing to allow Outlook to eliminate duplicate items for you. Then copy the contents of this folder to an empty public folder.

You can also use third party products to de-duplicate such as Sperry Software's Duplicate Contacts Eliminator, available at: <http://www.sperrysoftware.com>.

At the end of the process, all the contacts are in the public folder. Now, only the user's private contacts are in the desired destination folder. We often suggest setting up a relationship to a new contact folder in the private user's mailbox or to make a backup contact of the original folder contents, (such as "old contacts") and then move all the old contacts for each user into their own personal old contacts folder creating a relationship. This way all of their old contacts are there for their convenience and can eventually be discarded or if private contacts are there, they can drag them into their default contacts and then mark them private.

At this point you will have an empty private contacts folder an old contacts folder and a public contacts folder filled with all the de-duplicated contacts. Now you can create the desired relationship from the public contact folder to a private contact folder.

In our example, each user wants to have all the company contacts from the public down to their private. If anyone makes a new public contact, they want it be synchronized down to each private contact folder. Continuing our example, if the users want any new contacts made in their private contact folders to be synchronized up to the public contact folder, the user would make the mutual of the first relationship – the second half of the mutual relationship - from private-to-public.

Tip: If you want all the private contacts made in one user's folder to go to another user's folder, you HAVE to make a private-to-private relationship for each of those users as well.

Why? Many users believe they can make a relationship and copy items from User 1 to a public folder and then make a relationship from the public to User 2 and that User 1's information will go to User 2. Add2Outlook will never copy a copy. If all User 1's items need to go to the public and User 2's folder, you will need to create at least two relationships: one from the source (User 1) to the public folder AND one from the source (User 1) to User 2's folder.

Since Add2Outlook will not copy a copy, each relationship must be built from the original source to the ultimate destination. Therefore, if you want all contacts made in the public to synchronize to the private, and all those from the private to synchronize to the public and all items from the private to synchronize to all the other private users mailboxes, you need to create four relationships:

- Relationship from the Private to the Public
- Relationship from the Public to the Private
- Relationship from User 1's Private to User 2's Private
- Relationship from User 2's Private to User 1's Private

Summary

Before Add2Outlook, users may have manually copied items over to their destination folders and a contact item may be in several locations with varying degrees of "correctness". With the addition of Add2Outlook technology, a consolidation and de-duplication process which should occur before an Add2Outlook relationship is made. Once a relationship has been made when you close the Console, reply affirmatively to start the Add2Outlook service.

Tip: In testing, many people shorten the processing interval to 5 or 10 minutes. Some people have even changed it to 1 second. The Add2Outlook service cannot begin synchronizing again until the first synchronization cycle has completed. An item in the Event Log will attest to this. To test Add2Outlook, there is no need to modify the processing interval. Regardless of the interval specified in the Console, 60 seconds after starting the Add2Outlook service, Add2Outlook starts synchronizing every active calendar relationship (if there are any), then 60 seconds after the last calendar relationship, the contact relationships synchronize (if any) and then 60 seconds after the last contact relationship, the task relationships synchronize. After the last task relationship, Add2Outlook resumes the preset Intervals set within the Service Utility option.

After a complete synchronization cycle, Add2Outlook will synchronize to all destinations with valid active Add2Outlook relationships. Edit one contact, and the change will synchronize to the other locations on the next processing interval or if you start and stop the Add2Outlook service. Delete a source or destination and it will follow the specific rules of synchronization specified in the Add2Outlook relationship.

If at the start or during a synchronization cycle the Exchange Server is unavailable, Add2Outlook waits until Exchange is available, automatically starts, synchronizes and then waits until the next processing interval to synchronize again. If you open the Console, the Add2Outlook service automatically stops at whatever relationship it was processing. When the user exits the Console, the user is prompted to start the Add2Outlook service. When the Add2Outlook service starts, it begins synchronizing at the beginning of the relationship list, starting at the first relationship again, Add2Outlook does not continue synchronizing the relationship where the system left off when the Add2Outlook service was previously stopped.

4.9 Editing Relationships

If you need to change the settings of an existing relationship, be sure to consult either the section [Recommended Relationship Settings](#) to assist you in making the correct choices.

Any changes to the relationships **MUST** be done logged in as the User.

Effects of various changes to existing items or rules:

Most options may be changed after relationship creation with the exception of the source or destination folder selection and the Auto place Text. To change either of these options, you must delete the relationships and most often select to remove the destination items, let the system sync again and then remake the relationship after it has completed removing the relationship and destination items. This way there is no duplication and the source and destination folders are re picked correctly and the autoplace text option will fill in what you desire. Changes take effect the next time Add2Outlook synchronizes.

Again, you cannot edit the source or destination folders of the relationship, as these are what define the relationship in Add2Exchange. In order to do so, you need to delete this relationship and create a new one between the desired folders.

Also, removing or changing the automatic "Place Text Before or After Subject/File As field" does not remove the text from the prior synchronized items, but rather it only affects new items after the change. If this text is ok to be changed moving forward, edit the field and new items will sync that way. If all items are to be changed to the new selection in "auto place text" then delete the relationship and select to remove destination items, and sync, and then remake the relationship correctly. All items will now have the correct auto place text.

Changing the synchronization window does not remove calendar or task items which have already been synchronized to the destination that now fall outside the window. This window is a sliding window and does not remove destination items which fall outside the range.

Checking "Do Not Copy Private Items" does in fact delete from the destination the copies of those items marked private in the source folder and will do so even if the item was copied, and then the original was marked private subsequently. The sync will remove it anytime even if the relationship was set that way after it copied.

Changing either Source Item Deleted Resolution or Destination Item Deleted Resolution from Mark Item "Deleted" to a setting which does deletions or recopies does not delete items which have been processed by the earlier setting and does not recopy the items. The items marked "deleted" are orphans and will not copy again because there is no source to copy from.

To edit relationships, go to the Add2Outlook Console.

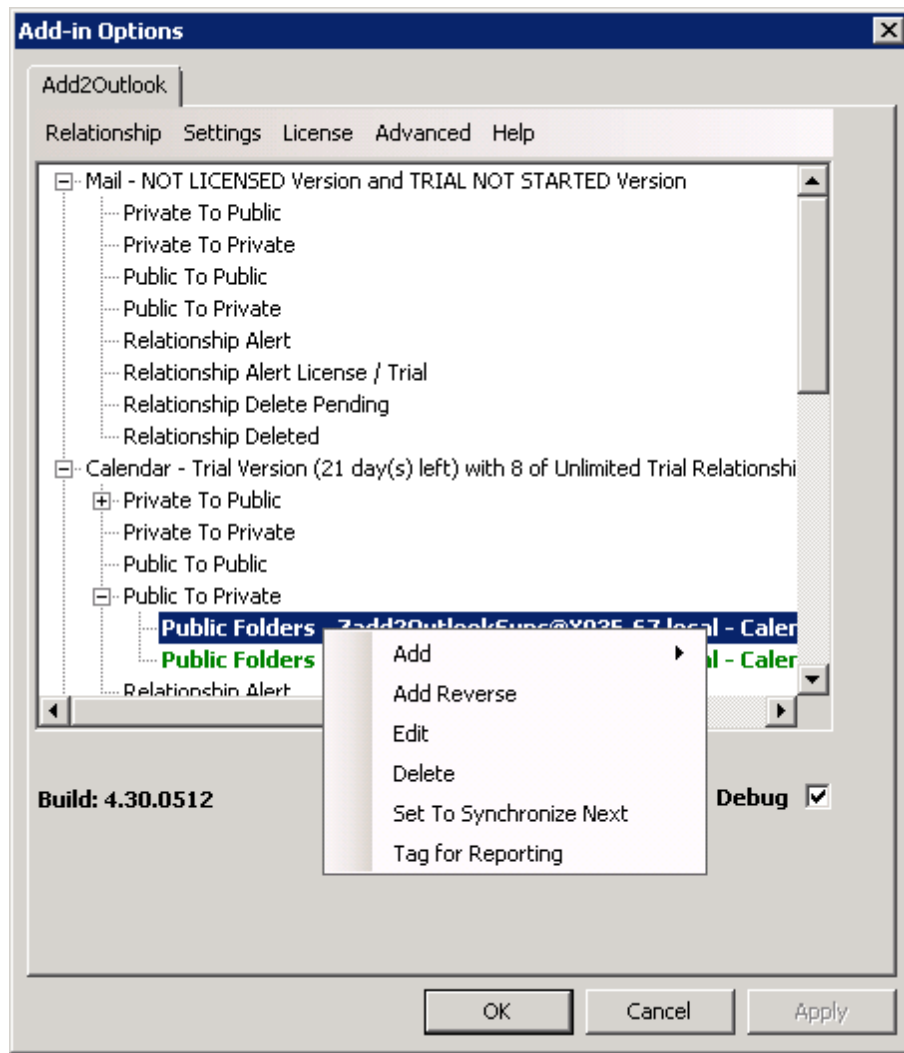
Depending on your version of Outlook, you access the Add2Outlook Console or Configuration Tab differently.

Outlook 2010: The Add2Outlook Console Tab or Configuration page is located in the File Options Add-ins page, Add2Outlook.

Outlook 2007: The Console Tab or Configuration page is located in Tools, Options, Add2Outlook.

Outlook 2003: The Add2Outlook Console is actually a tab from within Outlook Tools, Options, Add2Outlook.

Open the Add2Outlook Console for your version of Outlook. We will continue with the Outlook 2010 installation example as the screens are the same.



1. Right-click the relationship and select **Edit**, or from the File Menu, select **Edit**.
2. Choose the options you would like to change and then click **OK**.

Tip: The Relationship Edit Dialog is the same dialog as the Create new relationship, except there is no option for the option specified when made and what to do with Existing items called "For Existing Items". This option is only valid the first time you make the relationship. If you did not want to copy all items, or selected not to copy all existing items and you want to change your selection, instead of editing the relationship, you must delete it, select to remove the destination items and then run a full sync cycle.

3. Edit the options and save.

4.10 Deleting Relationships

Any changes to the relationships **MUST** be done logged in as the User.

If you are installing an Add2Outlook update, reinstall the new version over the older version.

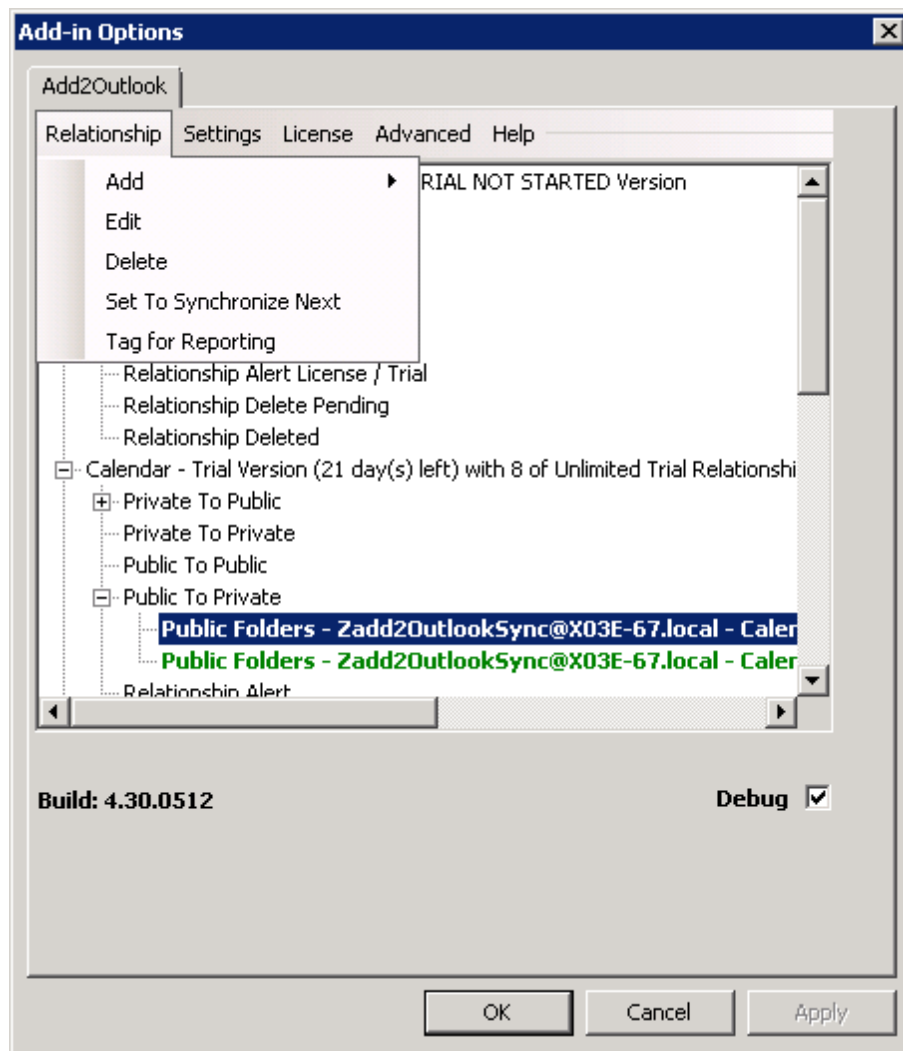
If upgrading Add2Outlook, you do not have to delete the relationships first, as Add2Outlook will save them

and reuse them, as long as the relationships are going to the same source and destination and the accounts are active. Your relationships will remain there intact after the upgrade and the upgrade does not change the rules of the relationships. If you are upgrading MS Outlook, uninstall the older version of Add2Outlook, upgrade Outlook and then download and install the correct version of Add2Outlook that matches your version of Outlook.

If you delete a relationship, make sure the user account you are deleting is still active (not disabled), and the Exchange Server (or other calendars) are available and online or the destination copies will not be removed.

Go into the Console and Right-click the Relationship and click Delete.

Tip: If you are completely removing Add2Outlook, be sure to delete all the relationships from within the Add2Outlook Console first so it can remove the tied copies.



Confirm this is the relationship you desire to delete. If you press **OK**, Add2Outlook will ask you to confirm the deletion, and give a reason for the deletion.

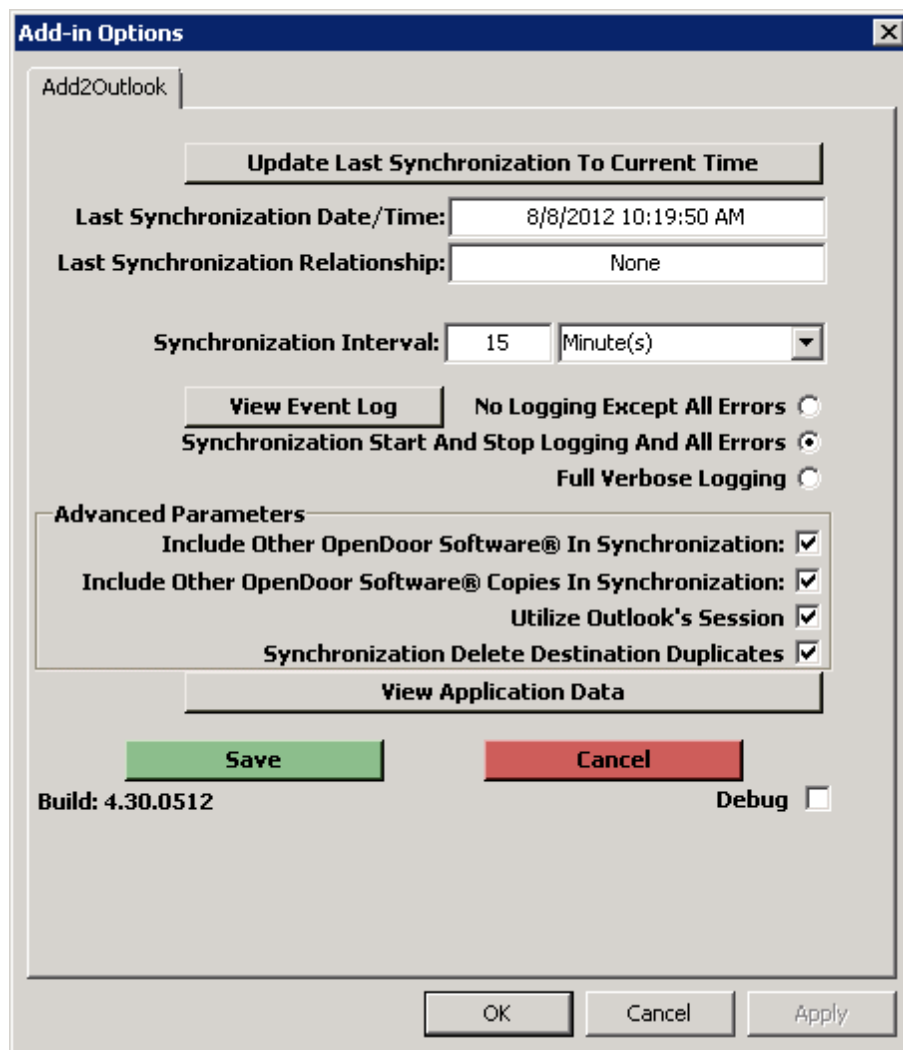
Press the **Delete Button** to delete (pressing enter will not delete the relationship).

During the deletion process, during the next sync, all the copies of the source item will be removed from the destination calendar.

4.11 Sync Interval

If you want to specify an automatic or timed sync, you will need to go and specify it as a Rule in the Console.

- Open Console and from the top menu bar (Add-In Options), click Settings then click Settings Display. The following screen will appear:



On installation, the default replication interval option is set for every 5 minutes. This means every 5 minutes the service will process the synchronization event and start replicating the items according to the relationship's parameters. If the system is in a sync cycle, it will wait until complete, then wait 5 minutes

and then start the sync again. We suggest a 10-15 minute interval to conserve resources.

Hint: If you change the replication interval, the synchronization will apply those changes after the current synchronization process has completed fully and will take effect for the next synchronization cycle.

Tip: Setting this interval to 1 minute is extremely undesirable, as Outlook will always be synchronizing. Again, have the synchronization interval period as long as possible to conserve your computer and network resources, and common values are MANUAL, 10 minutes, 15 minutes and hourly, depending on the folder type and business rule.

By design, Add2Outlook will not run the synchronization process while the prior replication is still running, or the Add2Outlook Configuration Console is open. To sync, close the Console and select Sync Now or Start the time and wait for the timer to start the sync.

4.12 Debugging and Logging

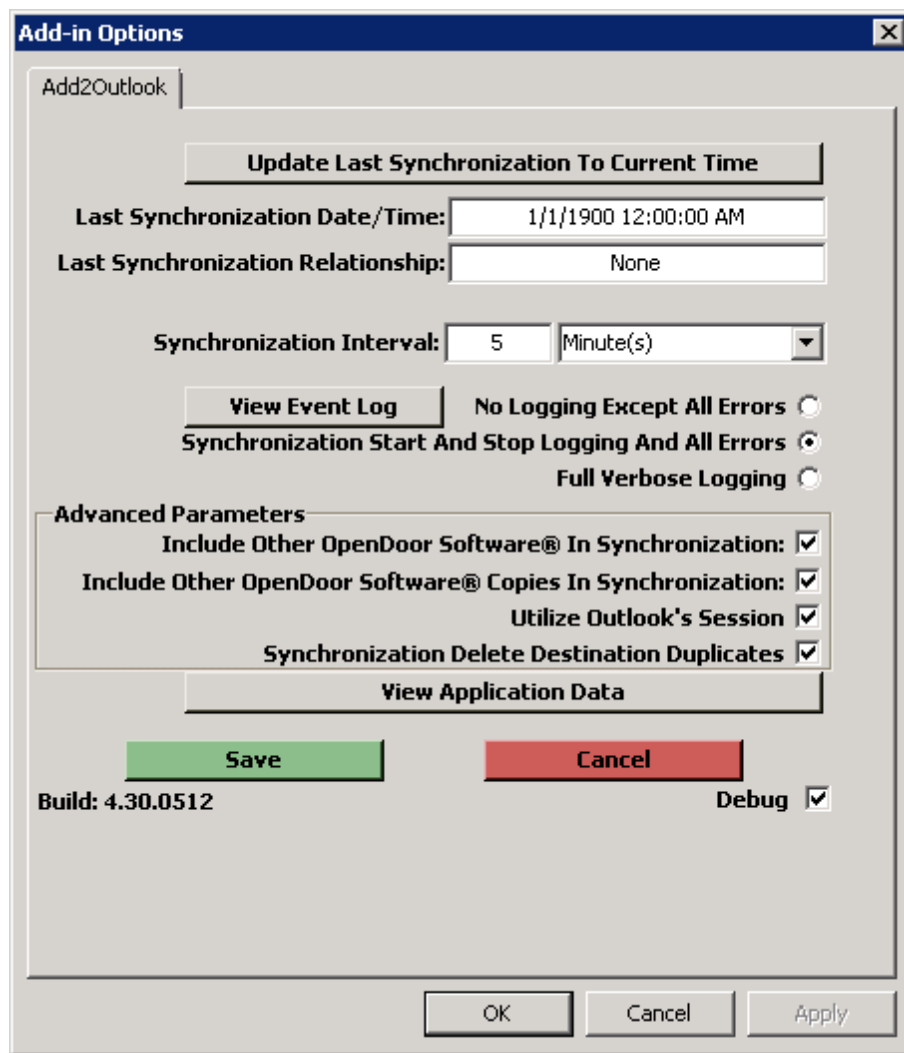
There are 4 types of logging:

- 1) **No logging Except all Errors** - No logging does not tell you how long it took to sync but will show errors.
- 2) **Sync Start/Stop and all Errors** - The normal default setting for normal operation, use Sync Start/Stop and all Errors Logging.
- 3) **Full Verbose Logging** - Full verbose logging is only useful if there are problems to figure out and shows connections, counts and much more information than is useful in a normally running system. It is also relatively slow than start and stop logging.
- 4) **Debug Logging** - See below for details.

All types of logging shows errors.

We have added an Add2Outlook log in the normal event logs of a machine.

To see any and all logging events for Add2Outlook, you can open up the Services.msc application from Manage Computer, the run command or the shortcut in Administrative Tools for Event Viewer, and select the Add2Outlook log.



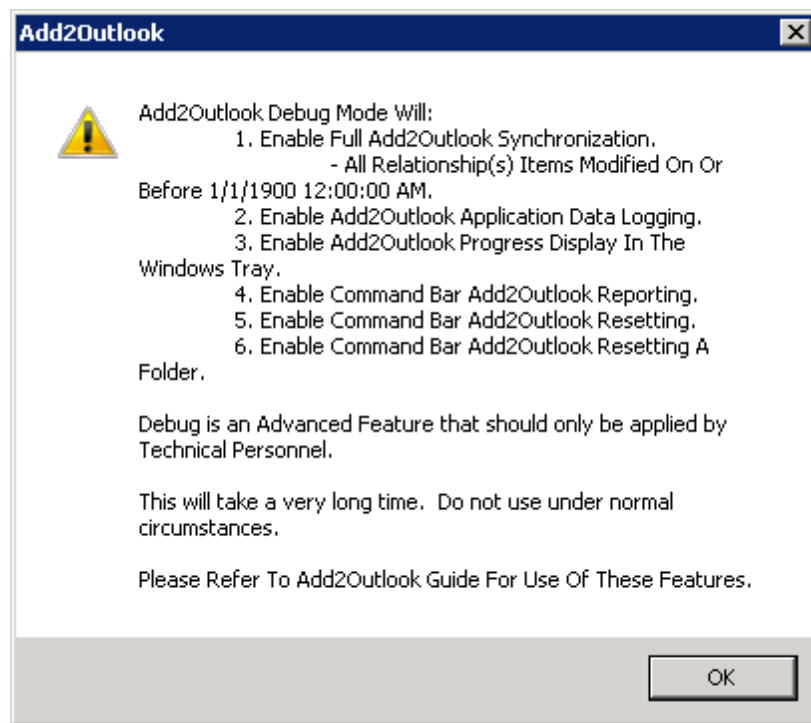
The most logging is Debug logging - Do not use unless instructed to do so by Technical Support please because it won't turn itself off and slows down everything.

Add2Outlook goes through to assist in Technical support if directed to do so.

To use this option, select the box for Debug Information Logging. All validation and item replication details get written to the Add2Outlook Application Log of the local machine.

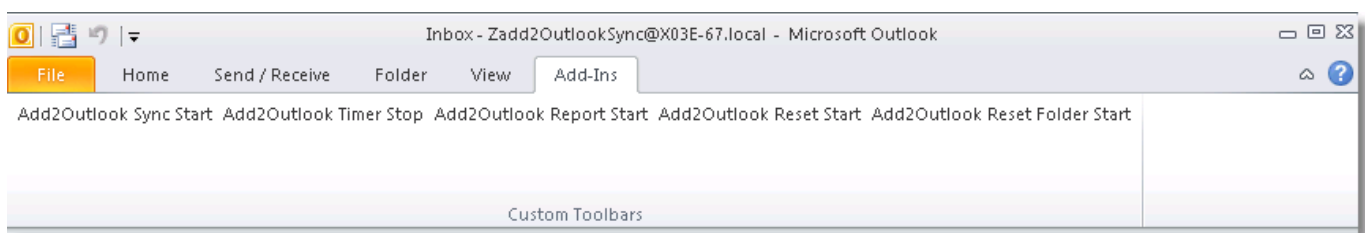
Debug ☒

When you click Debug you will get a screen just like the one below, click **OK**:



The fourth type of logging is extreme and is for technical support help. In normal operation there is no need to use Debug logging, as it severely slows the system down. Set this option and be sure to turn off the option (unchecked) if needed so replication occurs quicker. If directed to do so, and the log is sent to <http://support.diditbetter.com/support-request.aspx> for analysis, be sure to turn the option off again.

The debug option allows for several other options in the Add-ins tab:



Add2Outlook Reset: This option will remove all items replicated by the current relationships without deleting the relationships. The Add2Outlook Toolbox has more options and is often considered the better tool to use for this function. The Add2Outlook Toolbox is licensed separately or as part of the Value Bundle.

Add2Outlook Report: This option will not sync, but simulate syncing and analyze where all the replicated items came from. Again, the Add2Outlook Toolbox has more options and is often considered the better tool to use for this function. The Add2Outlook Toolbox is licensed separately or as part of the Value Bundle.

If you have these options in the Add-in menu, turn off the Debug checkbox as shown above so as not to accidentally press these buttons.

5 Troubleshooting

Provided in this section are some resources the user can refer to in case a problem arises. If the problem is not resolved, please feel free to contact us for support (link provided below).

FAQs	http://support.diditbetter.com/faq.aspx
Technical Bulletins and Supporting Files	http://support.diditbetter.com/technical-bulletins.aspx
Documentation	http://support.diditbetter.com/guides.aspx
Support Requests	http://support.diditbetter.com/support-request.aspx
Support Forums	http://support.diditbetter.com/forums.aspx

Contact Us

For Diditbetter Software Sales & Support Call 813-977-5739 or email support@diditbetter.com.

Please review our Troubleshooting & FAQ sections below before contacting support. They are available on the web at <http://support.diditbetter.com/knowledgebase.aspx> or in the A2O tab under License/Help.

Think you need Technical Assistance? We have provided a handy tool to help you export your configuration to be included in a support request.

Go to the Console and select Help Export Setup. The relationship information gets copied to where you save it in a text file and opens the text file for you. Please send it to support@diditbetter.com.

If remote assistance is desired, we can escalate your issue to Level Five Support. A list of your available options can be found here: <http://support.diditbetter.com/premium-support.aspx>.

We support remote desktop connection (RDC), www.Join.me, VNC, Citrix, Webex, LogMeIn, etc. Contact your support representative to enable this kind of assistance.

5.1 Relationship Alerts

In certain circumstances if you go into the Add2Outlook Console, you may find some relationships moved into the section called "Relationship Alert Status".

We have added and are continuing to add technology to check to make sure all the permissions are correct before the relationship fires, and if not, and the source or destination folders are not available, Add2Outlook will move the relationship into the "Alert" section. If the relationship is no longer valid, and the account or folder has been deleted, the relationship will be moved to the alert status section. You will need to go into the relationship and find out what the problem is, give the account permissions or re-point the source or destination folders to the appropriate place to get the relationship back working.

Tip: You should not delete and recreate a relationship in Alert status before getting the relationship back in normal status. If you delete the relationship on alert, the automatic housekeeping program that deletes the copies and unties the originals will not operate correctly.

The ideal solution is to fix the problem, such as connecting to the Exchange Server or re-enabling the account, un-hiding it from the Global Address list and then close the Console and Resync. After the sync, if you go back into the A2O Console and the relationship is in regular status, you have fixed the problem and you can proceed to replicate normally.

Some common reasons a relationship would be put in “Alert” are:

- Your Exchange Server is offline or your Outlook™ client is not connected.
- Changing permissions for the sync account user.
- Disabling a user from Active Directory.
- Deleting the account and mailbox.
- A relationship was built on a folder structure and then the structure was deleted and restored or client access permissions we changed.
- Migrating the mailboxes or public folders to a newer version of (version, not update) Exchange Server.
- Migrating mailboxes or public folders to a different store.

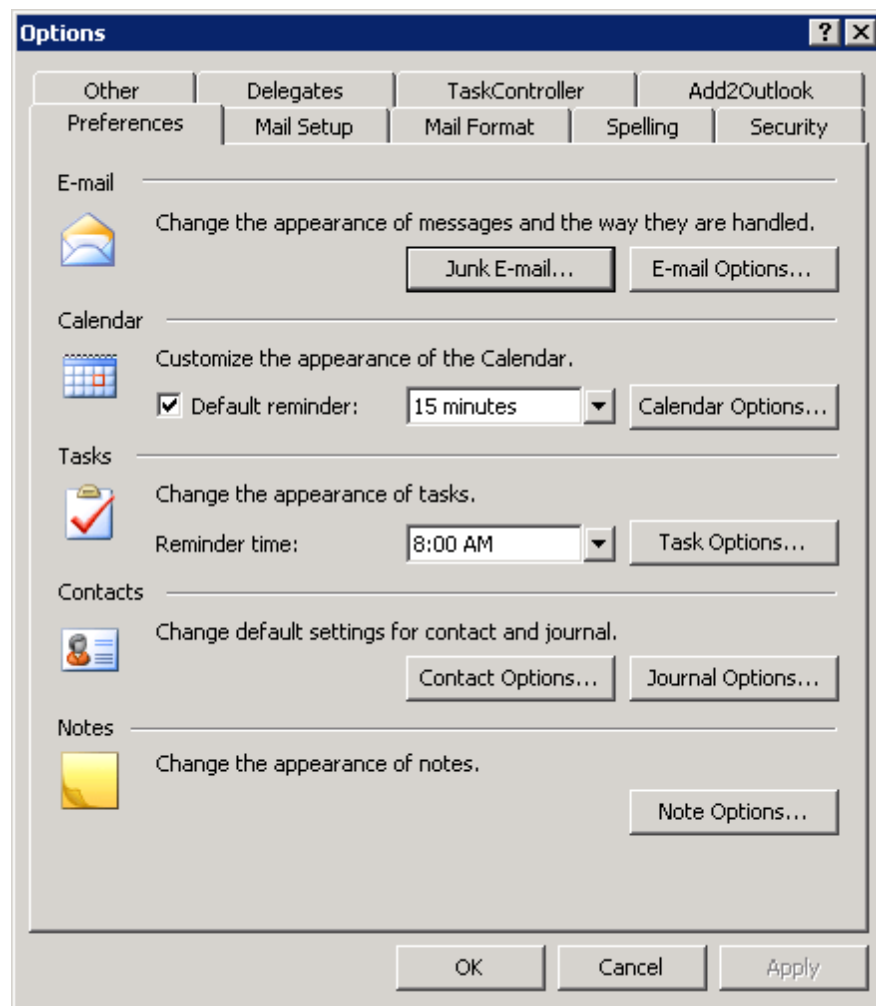
Relationships Recovery Mode

If a relationship is in alert, follow these steps to reconnect the relationships by using the recovery mode.

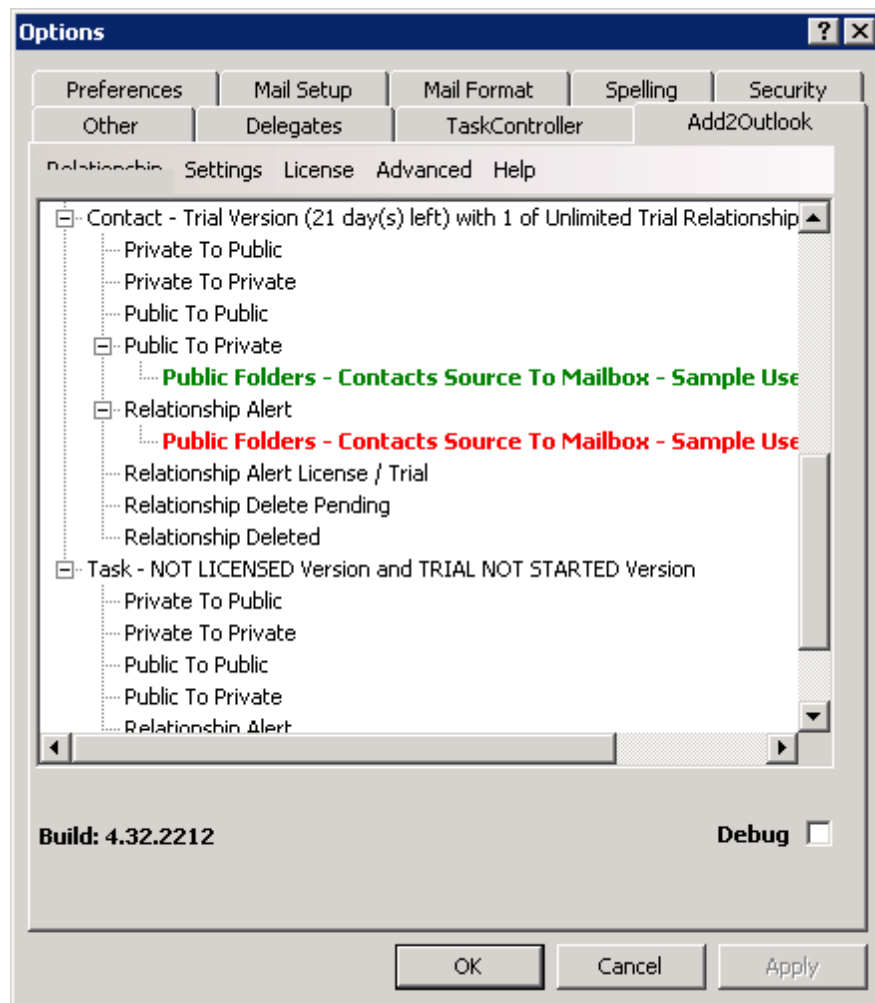
Source in Alert

Note: If it is the Destination in Alert, follow the **first 4 steps** below then skip to the section Destination in Alert.

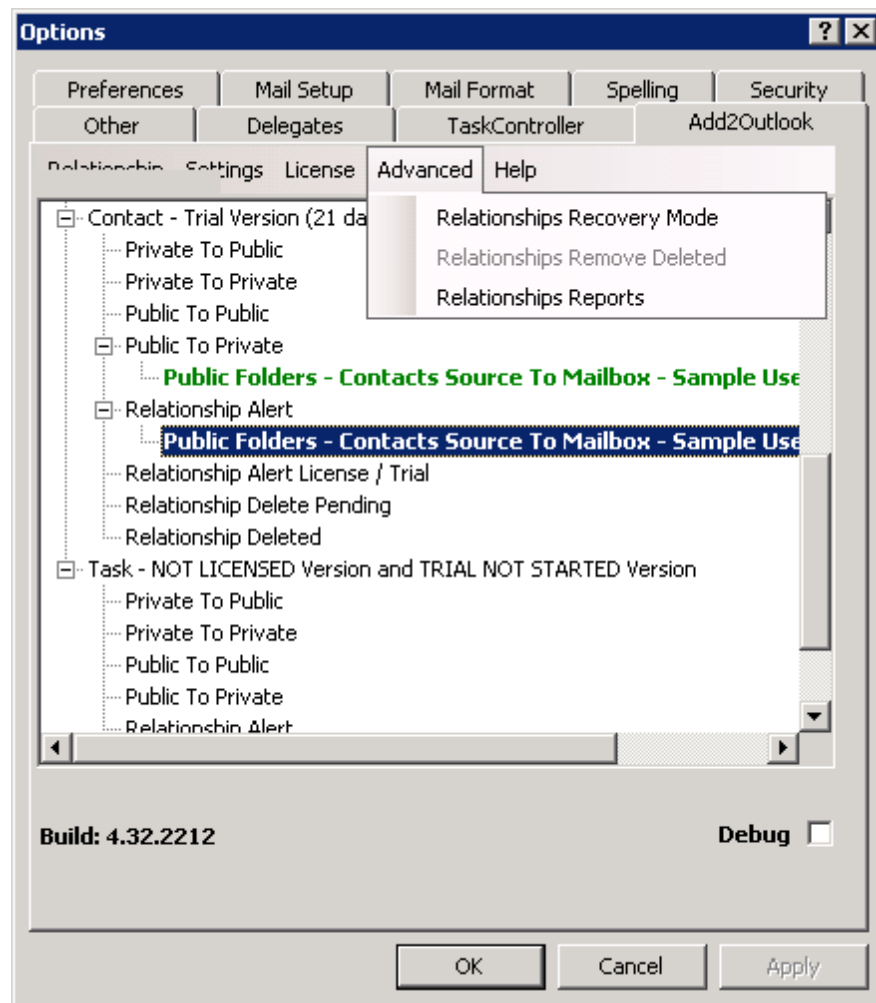
If both the Source and Destination are in alert, follow the instructions below and reconnect the relationships accordingly.



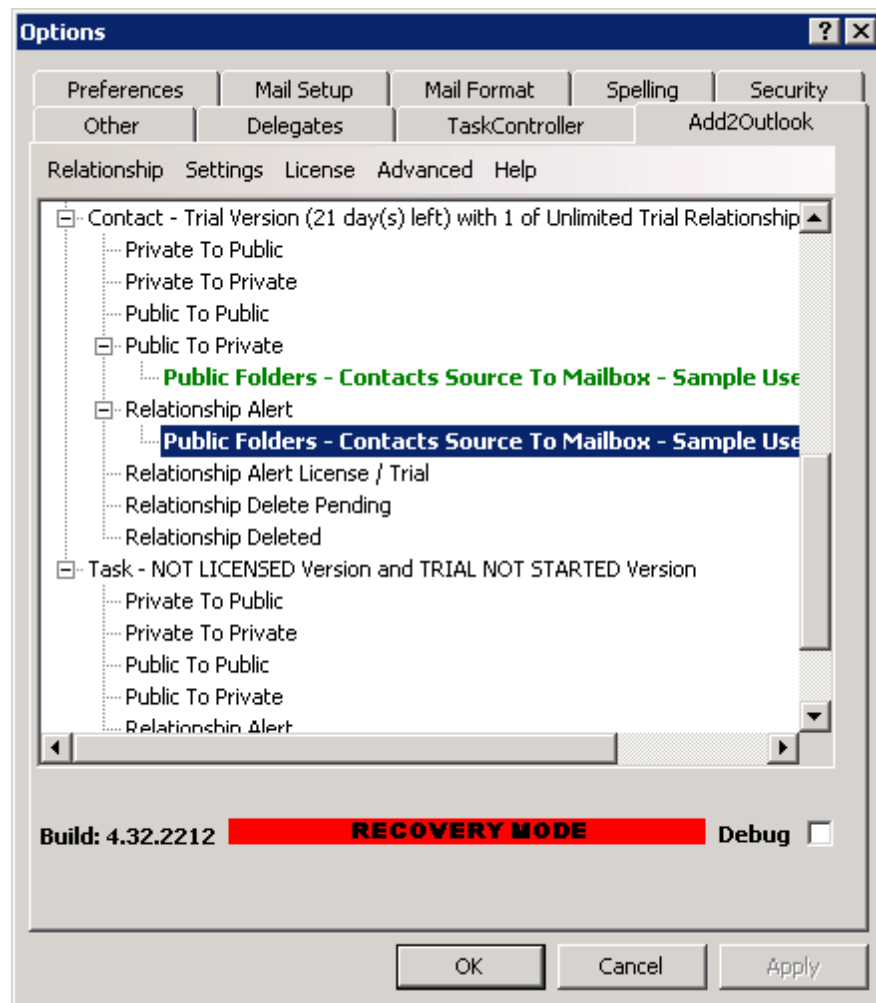
1. Click the **Tools** tab at the top of the page and select **Options** which will bring you to the screen above.



2. Click the **Add2Outlook** tab, and scroll down to find the red relationship in alert.



3. Select the relationship and click **Advanced** then click **Relationships Recovery Mode**.



4. When in Recovery Mode, a new label on the screen will be highlighted in red at the bottom and say Recovery Mode. Right click and edit the red highlighted relationship in alert.

Options [?] [X]

Preferences | Mail Setup | Mail Format | Spelling | Security
Other | Delegates | TaskController | Add2Outlook

Relationship Name: Public Folders - Contacts Source To Mailbox - Sample Us
Relationship Type: Contact | Public To Private
License Address: /o=First Organization/ou=First Administrative Group/cn

Source Alert **Select** **Destination**

Public Folders | Mailbox - Sample User 1001
Contacts Source | Contacts

Parameters

Place Text Before ☐ or After ☐

Subject or File As With: Pub

Do Not Copy Private: ☐
Set Dest. Reminder: ☐

Resolutions

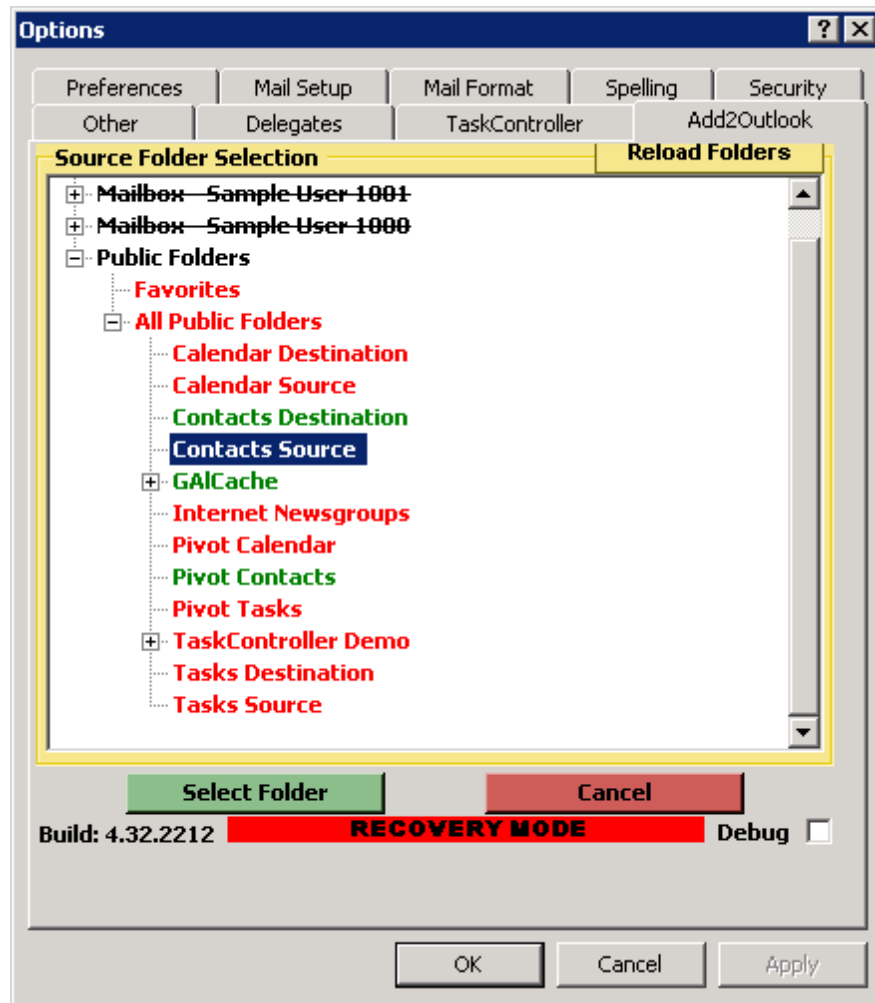
Conflict: Always Replace Item In Destination Folder
Copied: Overwrite Changes
Source Deleted: Delete Destination Item
Dest. Deleted: ReCopy The Source Item

Save **Cancel**

Build: 4.32.2212 **RECOVERY MODE** Debug ☐

OK Cancel Apply

5. Make a note of the source and destination folders for this relationship. In the picture above, the source side has a "**Select**" button next to Source Alert because the source side has not been verified. Make a note of the source folder and click **Select**.



6. Find the folder in the tree that represents the source folder in the relationship, it will be green, as will all other folder types of that type. Be careful to select the right folder which you want to reconnect the relationship to (in this example it is "Contacts Source" under Public Folders). Click **Select Folder**.

Options [?] [X]

Preferences | Mail Setup | Mail Format | Spelling | Security
Other | Delegates | TaskController | Add2Outlook

Relationship Name: Public Folders - Contacts Source To Mailbox - Sample Us
Relationship Type: Contact | Public To Private
License Address: /o=First Organization/ou=First Administrative Group/cn

Source	Destination
Public Folders	Mailbox - Sample User 1001
Contacts Source	Contacts

Parameters

Place Text Before ☒ or After ☐

Subject or File As With: Pub

Do Not Copy Private: ☐
Set Dest. Reminder: ☐

Resolutions

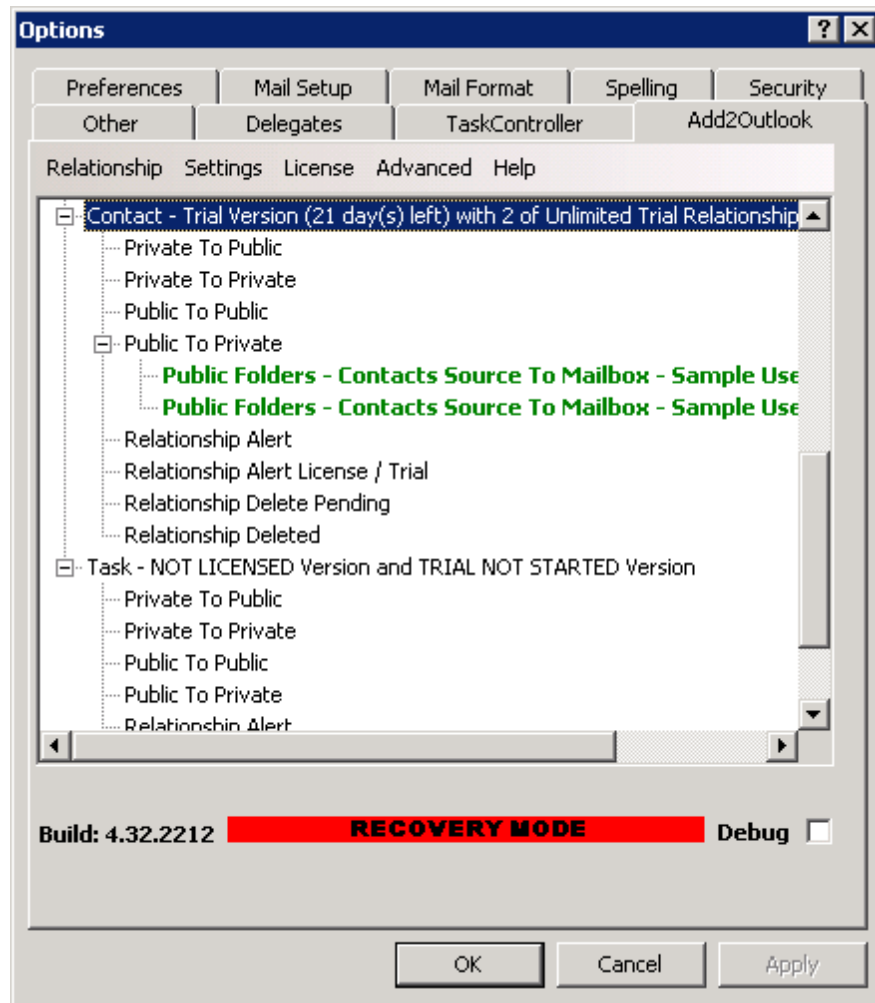
Conflict: Always Replace Item In Destination Folder
Copied: Overwrite Changes
Source Deleted: Delete Destination Item
Dest. Deleted: ReCopy The Source Item

Save **Cancel**

Build: 4.32.2212 **RECOVERY MODE** Debug ☐

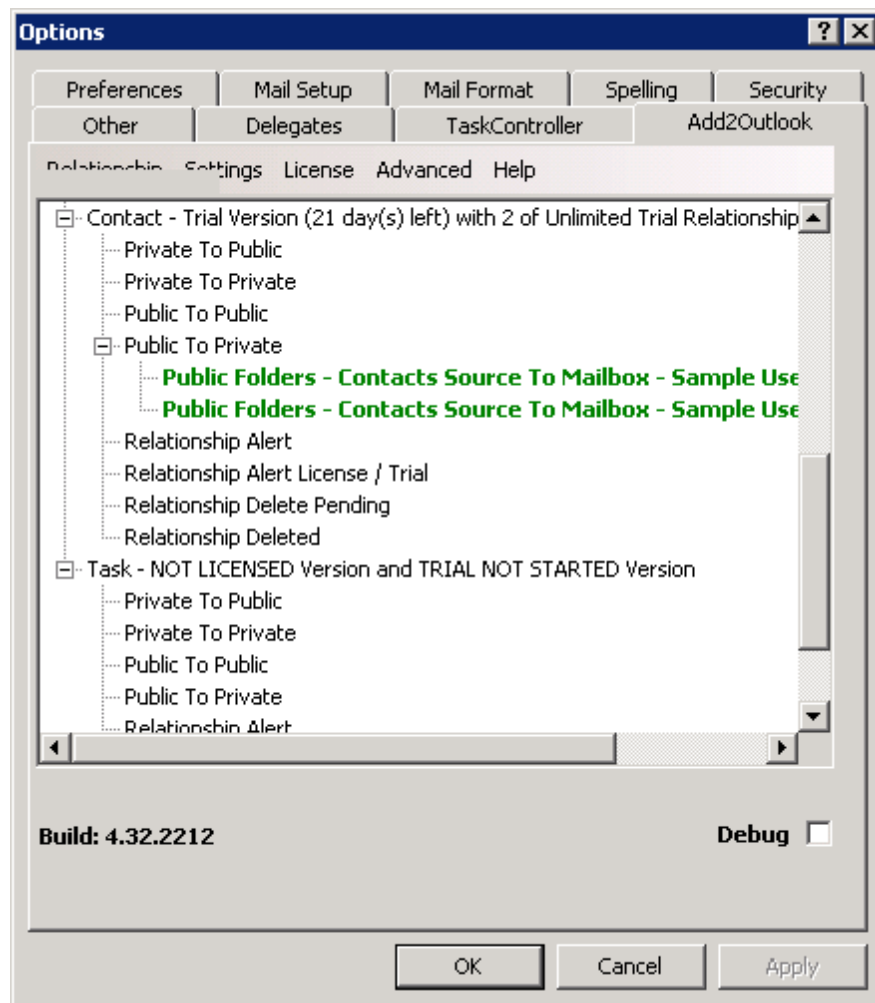
OK Cancel Apply

7. If done correctly, your screen should look like the one above. Notice the Source is no longer in alert. Click **Save**.



8. Notice the relationship is no longer red and is now green. Hit **OK** and it will be taken out of Recovery Mode.

Note: When you are completely out of recovery mode, your screen will look like the screen below.



Destination in Alert

Options

Preferences | Mail Setup | Mail Format | Spelling | Security
Other | Delegates | TaskController | **Add2Outlook**

Relationship Name: Public Folders - Contacts Source To Mailbox - Sample Us
Relationship Type: Contact | Public To Private
License Address: /o=First Organization/ou=First Administrative Group/cn

Source
 Public Folders
 Contacts Source

Destination Alert **Select**
 Mailbox - Sample User 1001
 Contacts

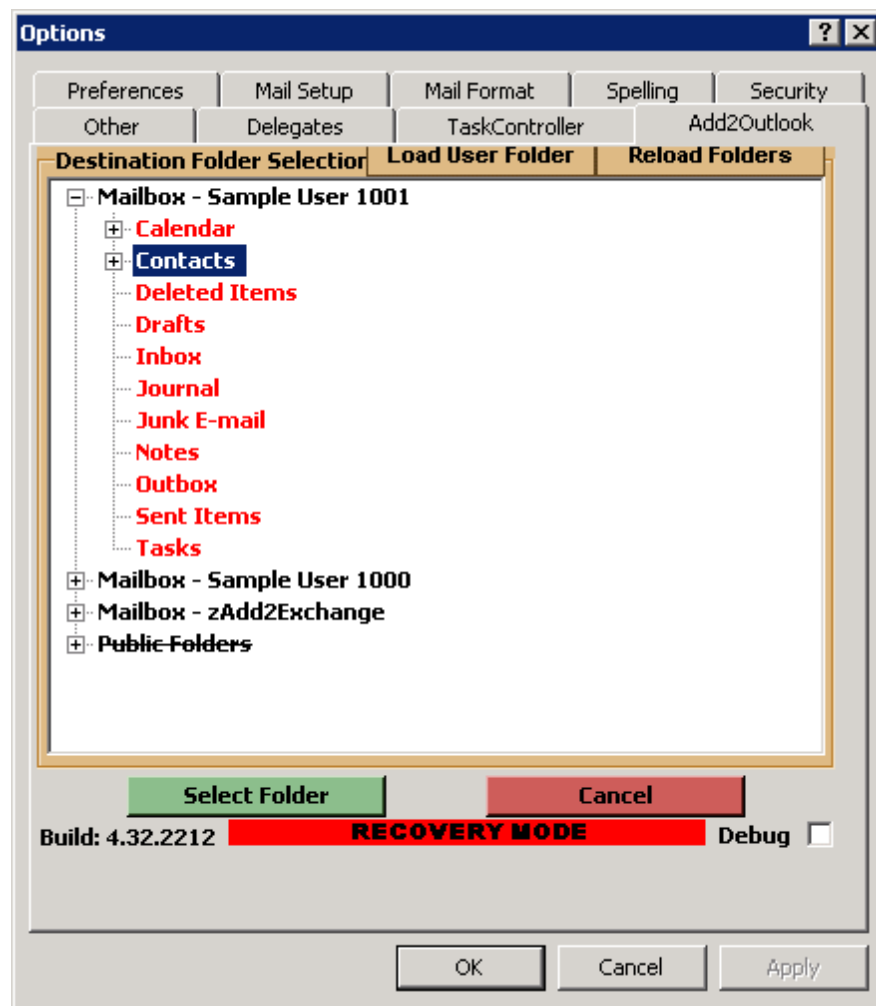
Parameters
 Place Text Before ☐ or After ☐
 Subject or File As With: Pub
 Do Not Copy Private: ☐
 Set Dest. Reminder: ☐
Resolutions
 Conflict: Always Replace Item In Destination Folder
 Copied: Overwrite Changes
 Source Deleted: Delete Destination Item
 Dest. Deleted: ReCopy The Source Item

Save **Cancel**

Build: 4.32.2212 **RECOVERY MODE** Debug ☐

OK Cancel Apply

5. Make a note of the source and destination folders for this relationship. In the picture above the destination side has a "**Select**" button next to Destination Alert because the destination side has not been verified. Make a note of the destination folder and click **Select**.

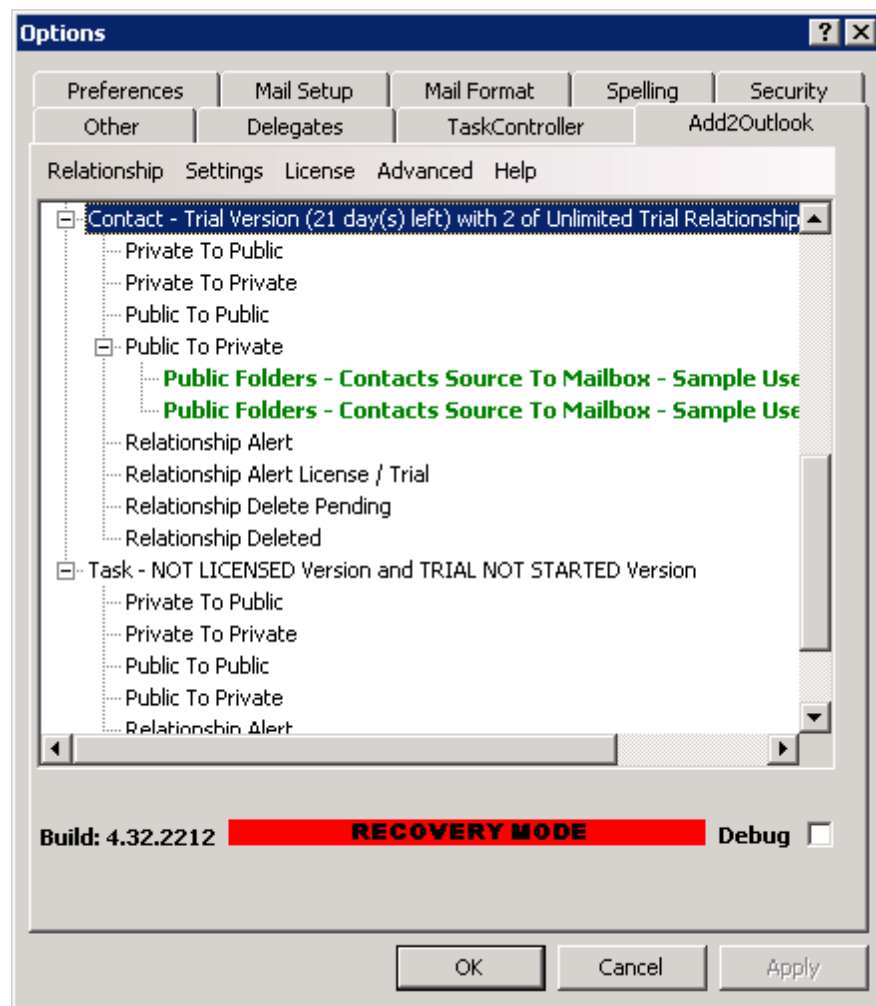


6. Find the folder in the tree that represents the destination folder in the relationship, it will be red, as will all other folder types of that type. Be careful to select the right folder which you want to reconnect the relationship to (in this example it is "Contacts" under Mailbox - Sample User 1001). Click **Select Folder**.

The screenshot shows the 'Options' dialog box with the 'Add2Outlook' tab selected. The 'Relationship Name' is 'tacts Source To Mailbox - Sample User 1001 - Contacts', 'Relationship Type' is 'Contact', and 'License Address' is '/o=First Organization/ou=First Administrative Group/cn'. The 'Source' section is highlighted in yellow and contains 'Public Folders' and 'Contacts Source'. The 'Destination' section is highlighted in orange and contains 'Mailbox - Sample User 1001' and 'Contacts'. The 'Parameters' section includes 'Place Text Before' (selected) or 'After', 'Subject or File As With: Pub', 'Do Not Copy Private' (unchecked), 'Set Dest. Reminder' (unchecked), 'Conflict: Always Replace Item In Destination Folder', 'Copied: Overwrite Changes', 'Source Deleted: Delete Destination Item', and 'Dest. Deleted: ReCopy The Source Item'. At the bottom, there are 'Save' and 'Cancel' buttons, a status bar showing 'Build: 4.32.2212' and 'RECOVERY MODE' in red, and a 'Debug' checkbox. At the very bottom are 'OK', 'Cancel', and 'Apply' buttons.

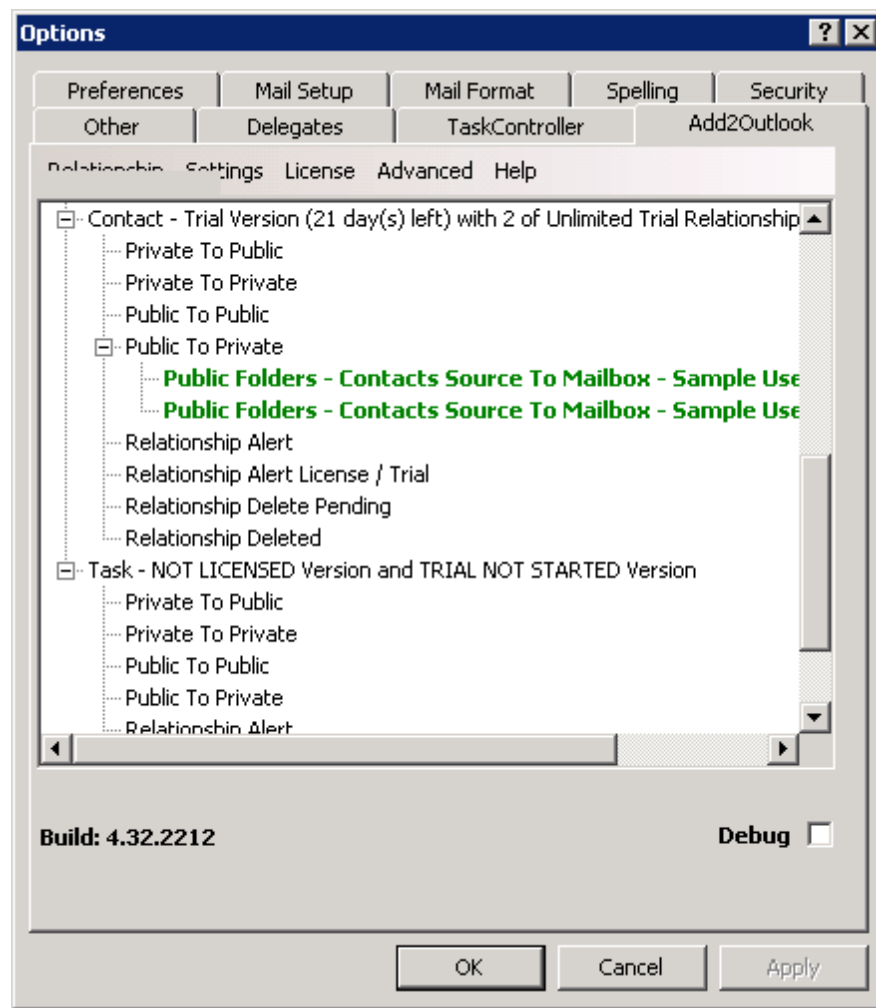
Options				
Preferences	Mail Setup	Mail Format	Spelling	Security
Other	Delegates	TaskController	Add2Outlook	
Relationship Name: tacts Source To Mailbox - Sample User 1001 - Contacts				
Relationship Type: Contact		Public To Private		
License Address: /o=First Organization/ou=First Administrative Group/cn				
Source		Destination		
Public Folders		Mailbox - Sample User 1001		
Contacts Source		Contacts		
Parameters				
Place Text Before <input checked="" type="radio"/> or After <input type="radio"/>				
Subject or File As With: Pub				
Do Not Copy Private: <input type="checkbox"/>				
Set Dest. Reminder: <input type="checkbox"/>				
Resolutions				
Conflict: Always Replace Item In Destination Folder				
Copied: Overwrite Changes				
Source Deleted: Delete Destination Item				
Dest. Deleted: ReCopy The Source Item				
Save		Cancel		
Build: 4.32.2212 RECOVERY MODE Debug <input type="checkbox"/>				
OK Cancel Apply				

7. If done correctly, your screen should look like the one above. Notice the Destination is no longer in alert. Click **Save**.



8. Notice the relationship is no longer red and is now green. Hit **OK** and it will be taken out of Recovery Mode.

Note: When you are completely out of recovery mode, your screen will look like the screen below.



5.2 Questions

For more up to date questions and answers please visit <http://support.diditbetter.com/add2outlook-forums.aspx>.

Common Functionality Questions

Q. Will A2O sync old appointments and meetings from the dates before I installed the program if I need to capture them all? A. Yes this can be done. The program has a prior date range which will replicate as far back as you desire. Using the 0 dates prior and 0 dates post will replicate all calendar and task items. **Note:** reoccurring appointments do not get replicated unless you select a date range that contains THE FIRST instance of the (master of the series) appointment.

Q. Can I create an item in my private calendar and have it somehow tie into the group or can I only make items in the group calendar with the A2O program? A. YES. A2O was designed for users

with smartphones and mobile devices in mind. For this scenario, there could even be 2 calendar relationships for this use, one from public-to-private and one from private appointments being replicated to the public folder. Since the public calendar folders are not available offline on most smartphones and mobile devices, A2O makes a copy from a “group” or “public” calendar of everything within the definable date range and puts a copy in your personal calendar. Then, to have private items replicate to the public folder, so items from your personal calendar get replicated to your public calendar, you will need to set up the second relationship.

Q. When I set up A2O I set up the replication mode for timed replication for every 2 hours. Once I have set this up can I also do it on demand and if so how? A. The program can be run both ways. You can set the program to automatically replicate on a timed basis and you can also press the Sync Now toolbar button in Outlook and it will manually start replicating and reset the timer. If you wish, you can turn off the Timed option in the Add2Outlook Console. In order for the program to replicate in manual or timed mode, Outlook has to be open and logged in as that user.

Q. When I create an appointment in the public calendar, A2O copies it to my personal calendar. Then I make a change to the item in my personal calendar in that appointment at a later date. Will A2O overwrite the one I changed the next time it syncs? Also, can I make changes to an item that has been copied over to my personal calendar like meeting notes without it being overwritten?

A. First Question, Yes it can be overwritten depending on your relationship, but you can also specify that the program will untie the changed copy and make a new tied copy from the source. Second Question, Yes you can make changes and keep those changes. You will need to make sure that you do not have the option in your Add2Outlook Console to “overwrite the changed destination item”, and instead select preserve changes and make a new tied copy. If overwrite the changed destination item option is selected, the program will overwrite any changes that you make the next time it replicates. If it is not selected in the rules of the relationship and the option to untie and make a new destination copy is selected, the next time the item is changed, it will untie the changed item and make a new copy of the item and save your changes. This is a special case use and will create your copy and duplicate the originals, sometimes causing some questions. Talk to one of our technicians to discuss this further and see if it is best for you.

Frequently Asked Questions

Updated list here: <http://support.diditbetter.com/add2outlook-faq.aspx>.

Q. Where is the program installed? I prefer to not use the server. A. You should not and will not need to load anything on the server. The Add2Outlook Com add-in program runs on the workstation with Outlook and not the server. They only use the domain information from Exchange or from a Pop3 email account. You can also have multiple profiles on the computer, and will need to set up the options for each profile.

Q. Is the A2O software add-in loaded on both the server and the workstations or just the client pc? A. Again, No. A2O is only installed on the workstation/client pc, for that version of Outlook and is an add-in to Outlook. Outlook should not be installed on the Exchange Server as per Microsoft best practices.

Q: Do you have a demo? A. Yes, there is a fully functional trial version you can download and install on a client machine to test and evaluate the functionality to make sure the solution fits your needs. If the solution fits, you can purchase, request a license, and activate the product in place without reinstalling. Before installing any trial version, review the Installation Guide carefully in order to configure it to your needs. Get the trial from <http://support.diditbetter.com/downloads.aspx>.

Q: How long is the A2O trial period? What happens when the trial version expires? A. The trial version is 21 days. When your trial period ends, it stops working with no effect on any of the appointments

you have already created; however, the program won't replicate any new calendar items and the data becomes "Stale".

Q: My trial expired and I want to buy the solution. How can I buy the solution? A. You can purchase the solution online by downloading and faxing your order form to us so we can process your payment. You can also click on the Buy Now link from our website to order online. Then, visit <http://support.diditbetter.com/product-activation.aspx> for instructions on getting your activation key.

Q. What do you mean by domain license? A. An unlimited license per EOU refers to the unique key that covers all users in a single Exchange organizational unit (EOU) as defined in Exchange. Most organizations have all users in one Exchange Organizational Unit. A Single user or multiple user licenses are tied to that user's unique user address and is nontransferable to other users. An unlimited license per organizational unit covers all users in the organization at any time in the present and any new users in the future.

Q: Do I have to reinstall the program once I buy it? A. No, since you have the trial version already installed, you won't need to reinstall the program when you buy it **unless a new update has been released** – and then it is highly recommended. Follow the Instructions for Getting Your Activation Key (Purchasing Section Above) once you send us the information we need to issue your activation key, we will generate your unique key, and email it back to you. All you need to do is copy and paste the key in Step 3 and your solution will be activated.

Q: Do I need a different activation key for each user? A. It depends: Yes, if you purchased a single user or multiple user licenses, you do have to apply and receive a different activation key for each user. A Single user key will activate a single user in the Exchange Organizational Unit, but not others and is non transferable. If you purchased an unlimited-user license, you will use the same key for all users. An unlimited-user license covers all users in a single Exchange Organizational Unit. If you purchase 2 single user licenses, you will need to follow the activation instructions on the License screen for each user since each user needs their own unique key.

Q. How do I get a key once I have finished testing? A. In Outlook, right click a folder and go to the Add2Outlook Console tab. Select the License dropdown and then the Purchase tab for the part of the application you want to license. Select Step 2 and fill out the information. When done, select "License What" and select Add2Outlook. Press OK and Accept and the license request has been sent off to Diditbetter.com Software. Licensing is a three-step process. You will need to copy and paste the information in Step 2 into an e-mail and send it to register@diditbetter.com. This is your domain information that we will create a key with and e-mail you back a key. Then, when you receive the key, copy it to the clipboard and go back into the Purchase screen, go to Step 3 and paste your new license key into Box #1 in the first field of the KKLICENSE Key (sent to you) option of Step 3.

Q. Will the Exchange server have to be taken down during install of A2O? A. No. You may need to install the Microsoft .Net services on your workstation, but the service has nothing to do with the Exchange Server. On your workstation, go to Control panel and make sure you have the .Net framework in Add/Remove Programs. To get it, go to the advanced option at the windows update site, reboot, and then do any service packs to .NET. This may also require a reboot. The A2O install program requires Outlook to be closed during the install, but does require a reboot of the workstation.

Q. Does A2O work without Exchange if I am using Web Access? A. Yes and No. If you have installed this on a separate workstation as the replication server, then YES! If you have installed this on someone else's workstation, and their Outlook is open, then YES! If you have installed this on your Outlook box and Outlook is not open, then No.

Technical Questions

Q: Why don't the A2O menu buttons always appear in Outlook? A. Our "Add to Outlook" programs are Com Add-ins and most Com Add-ins usually start only when Outlook starts up FRESH. By fresh, we mean that no other Outlook Processes are open at the time of starting up. Outlook doesn't always close ALL the associated programs when loading, especially if Word is your email editor, it can keep outlook.exe in the processes tab of Task Manager. This means Outlook hasn't completely closed and therefore, if the program was not loaded, none of the Com Add-ins will load until either you reboot, or log off and log back on, or kill Outlook from memory and then restart Outlook. Technical people know how to manually stop all the associated Outlook processes from Task Manager so the Outlook can then load "FRESH" and all the Com Add-ins will load when Outlook starts up. This could be the reason the tab doesn't show up. The confusing part is the checkbox next to the Com add-in says it should be loaded, but that only means it will load when Outlook starts up. Most people think the checkbox means that it is in memory, but it is not. Just log out and back in, and it should show up.

Q: How do I re-enable an Outlook Com Add-in in Outlook XP or Outlook 2003? A. Go to Tools then Options. Go to the software's tab. If there is no tab, in Outlook 2003 go to HELP in Outlook, Disabled Items and make sure it is not disabled. If it is, re-enable it and then close Outlook and wait 7-10 seconds and then go back into Outlook and it should be there. If this is Outlook 2007 go into Outlook and select Tools Trust Center, and then Com Add-ins, Go and enable. In Outlook 2010, to File, options, Add-ins and then Com Add-ins, Go and enable. Then restart Outlook.

If there are things you do not understand or you have questions, please contact Technical support by going to <http://support.diditbetter.com/support-request.aspx> for free email support.

If there is a conflict and you want to escalate, visit <http://support.diditbetter.com/premium-support.aspx>.