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1 Introduction

Thank you for evaluating the Add2Outlook ToolKit!

The Add2Outlook ToolKit is an add-on for Add2Outlook that provides five main functions:

- Removal of tags from appointment subjects and contact "file as" fields, such as "Deleted" markers or Autopop text ([Change Items](#)^[12])
- Mass copying of one item field to another in a folder of items, for example, the *business phone* field to the *mobile phone* field ([Change Items](#)^[12])
- Mass changing the form or item type of a folder of items ([Update Forms](#)^[16])
- Remove copied items and/or Add2Outlook's hidden fields from items ([Reset Products](#)^[18])
- Determine whether items belong to an Add2Outlook relationship and whether they are copies or not ([Analyze Items](#)^[20])

2 Requirements

Add2Outlook ToolKit installs on any desktop machine that has Microsoft Outlook installed. Note that you should not install it on a server since servers should not have Outlook installed on them.

In order to make best use of the ToolKit, install it on the same machine that has Add2Outlook installed.

3 Install

Prerequisites:

- 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 able to connect to your Exchange Server
 - You cannot install, configure and upgrade this program offline

Obtaining the Software

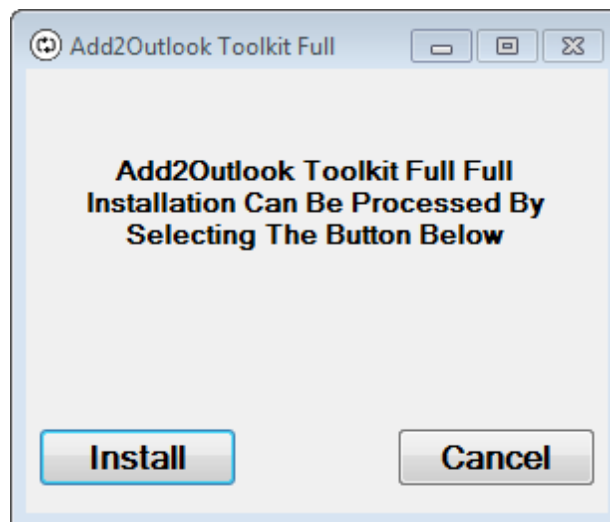
Get the latest software from <http://store.diditbetter.com/downloads.aspx>.

Upgrades are not necessary to license the product, but please use the latest release. 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.

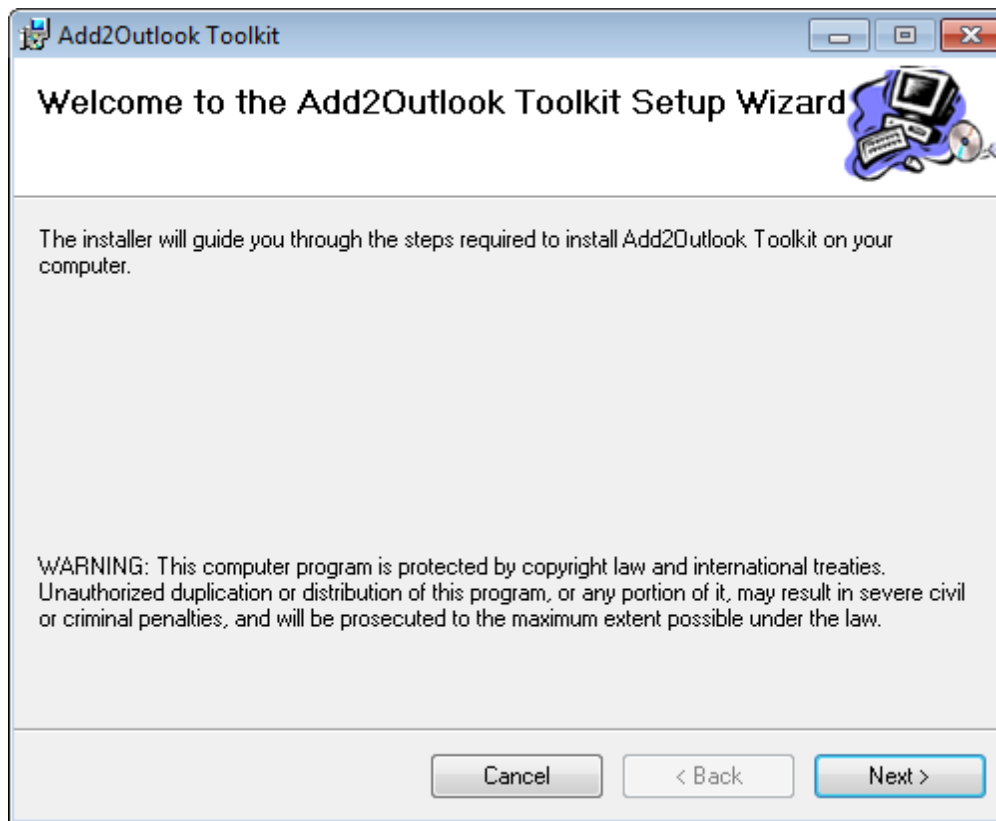
TIP: Please keep the installation files in a safe place. OpenDoor Software does not provide retired releases of the software, but will provide the latest version which works with MS Critical Service packs in effect at the time.

Installing the Software

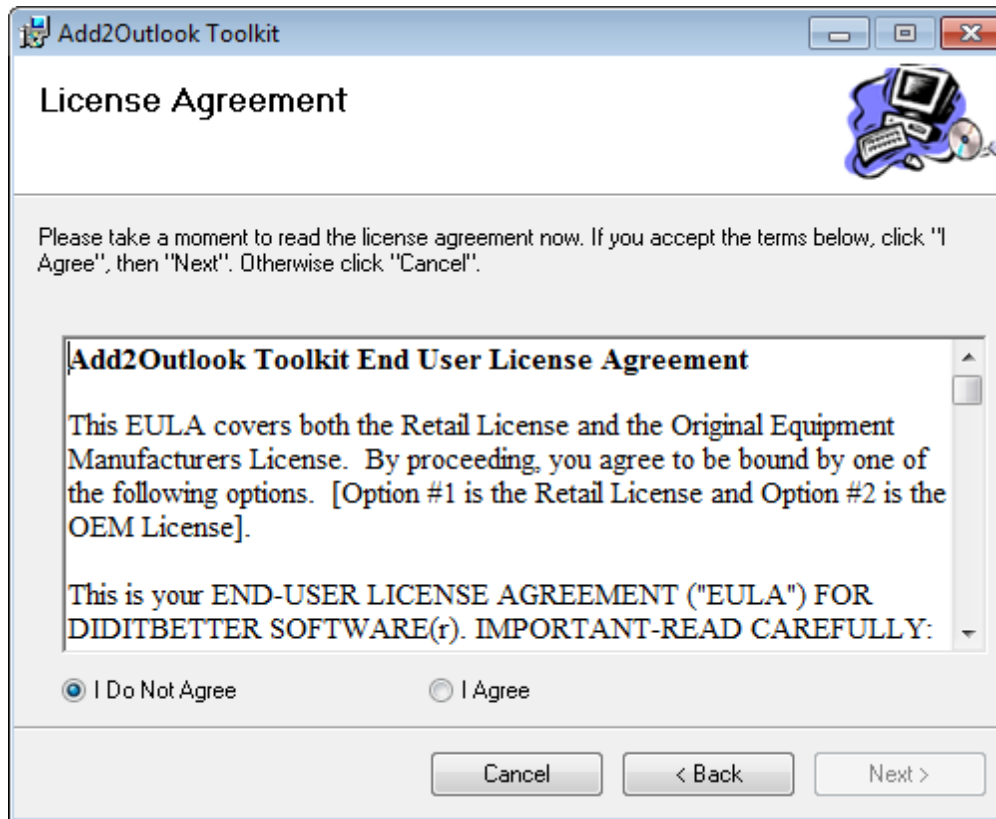
- Run the self extracting executable and it will extract the files to a directory
- Double-click *Add2Outlook Toolkit Full.exe*



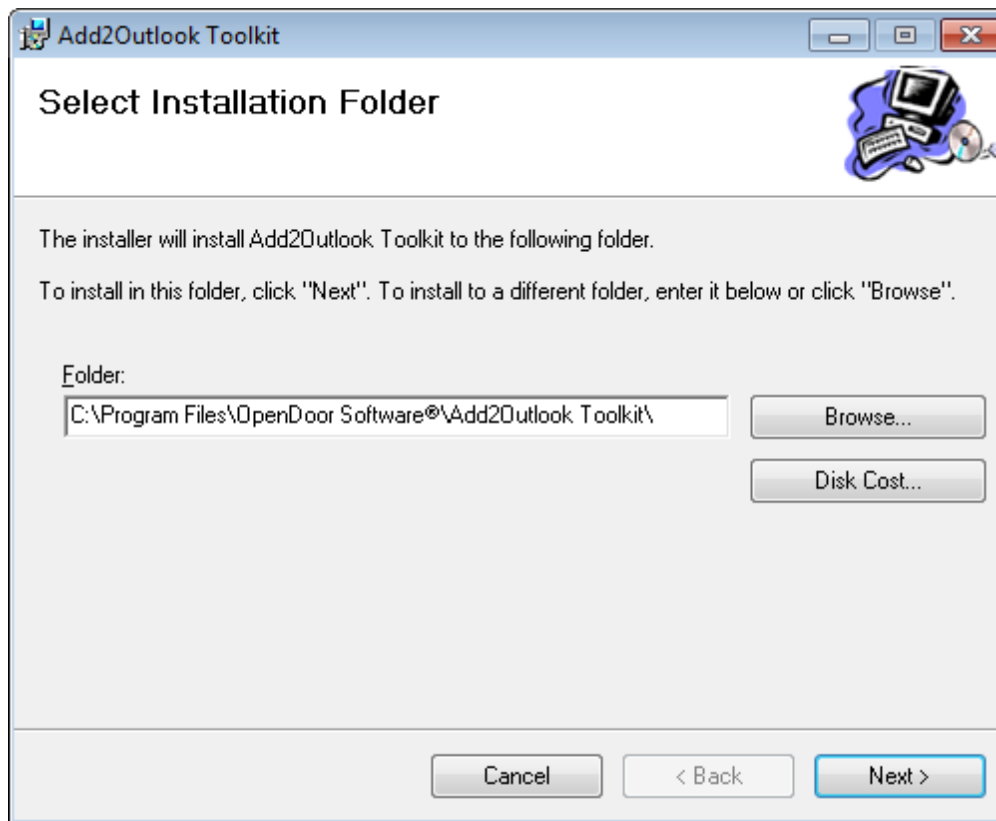
- Click *Install*



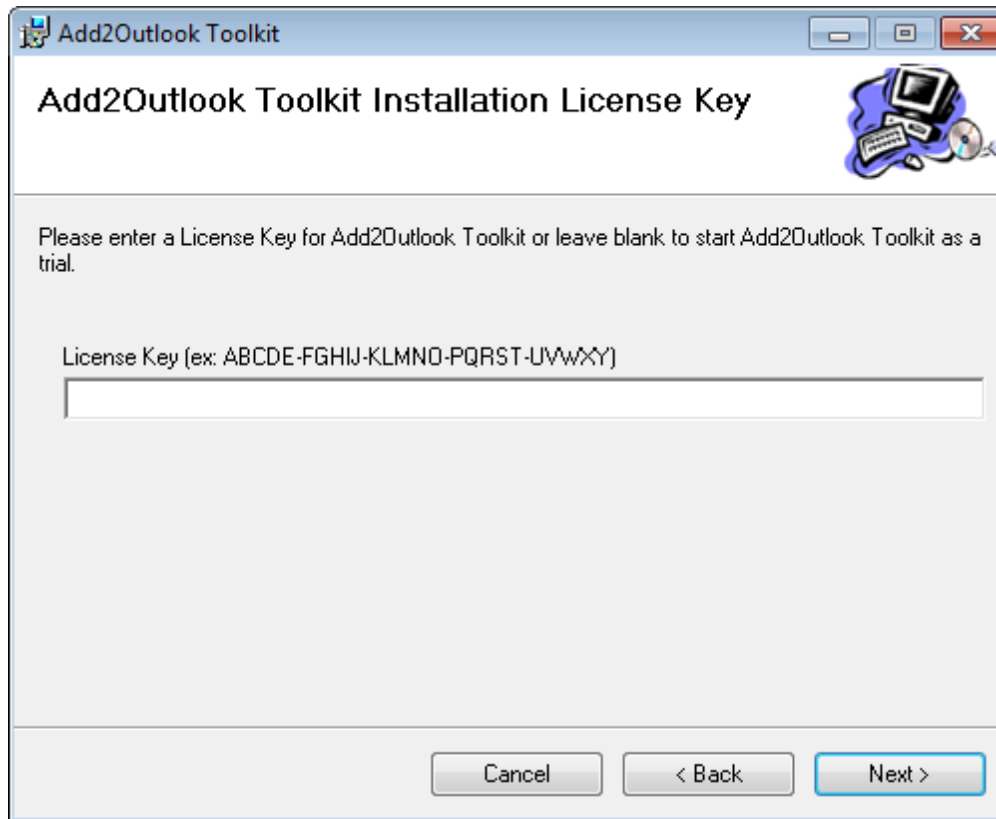
- Click *Next >*



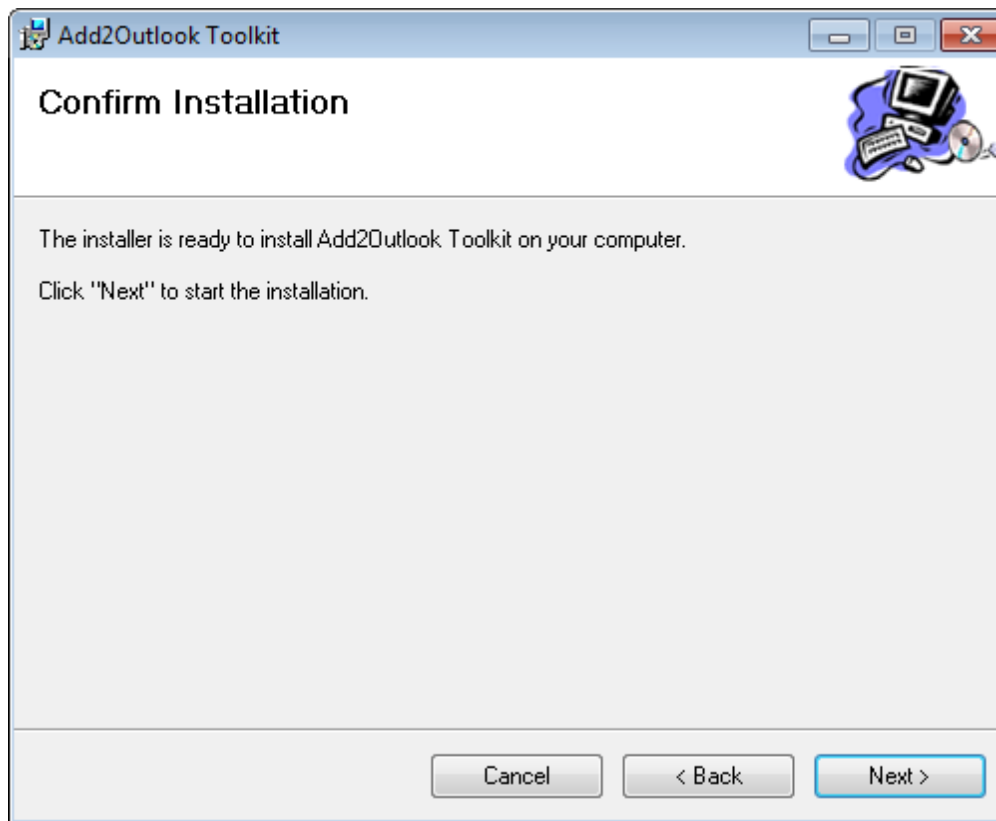
- Select "I Agree" if you agree to the terms and click *Next >*



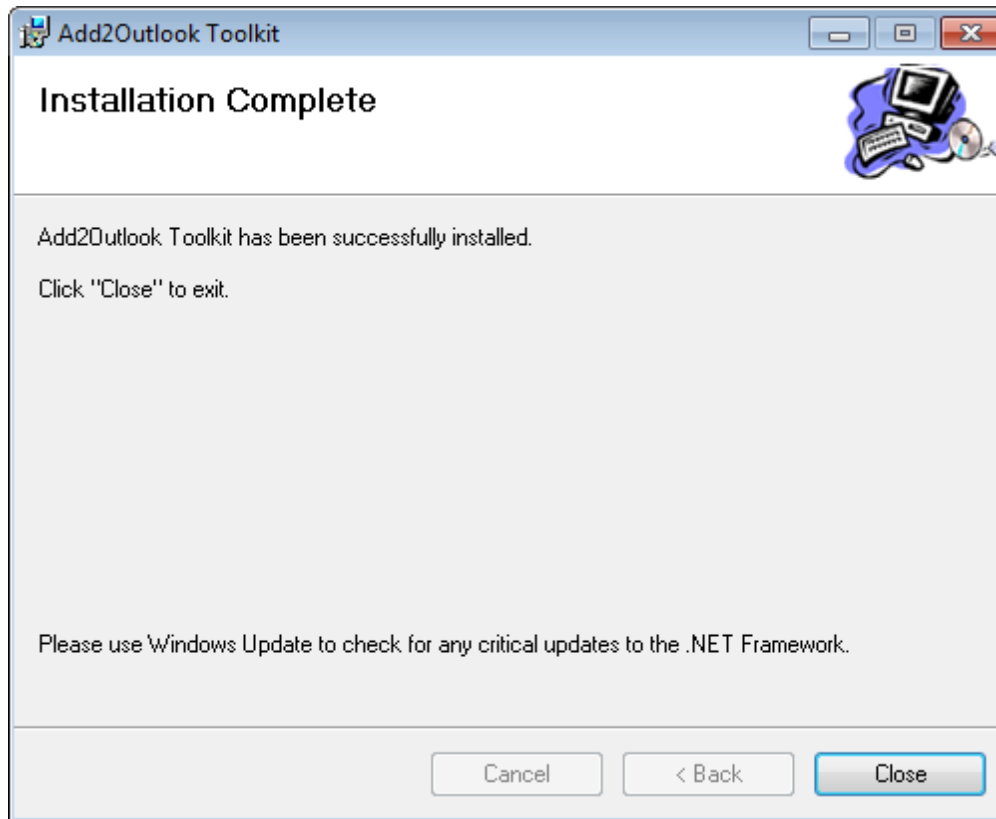
- If you would like to install in another folder, click *Browse...* and select your folder. Otherwise click *Next >*.



- If you have a license key already, paste it in here. Otherwise click *Next >* to begin your 21-day trial.



- Click *Next >*



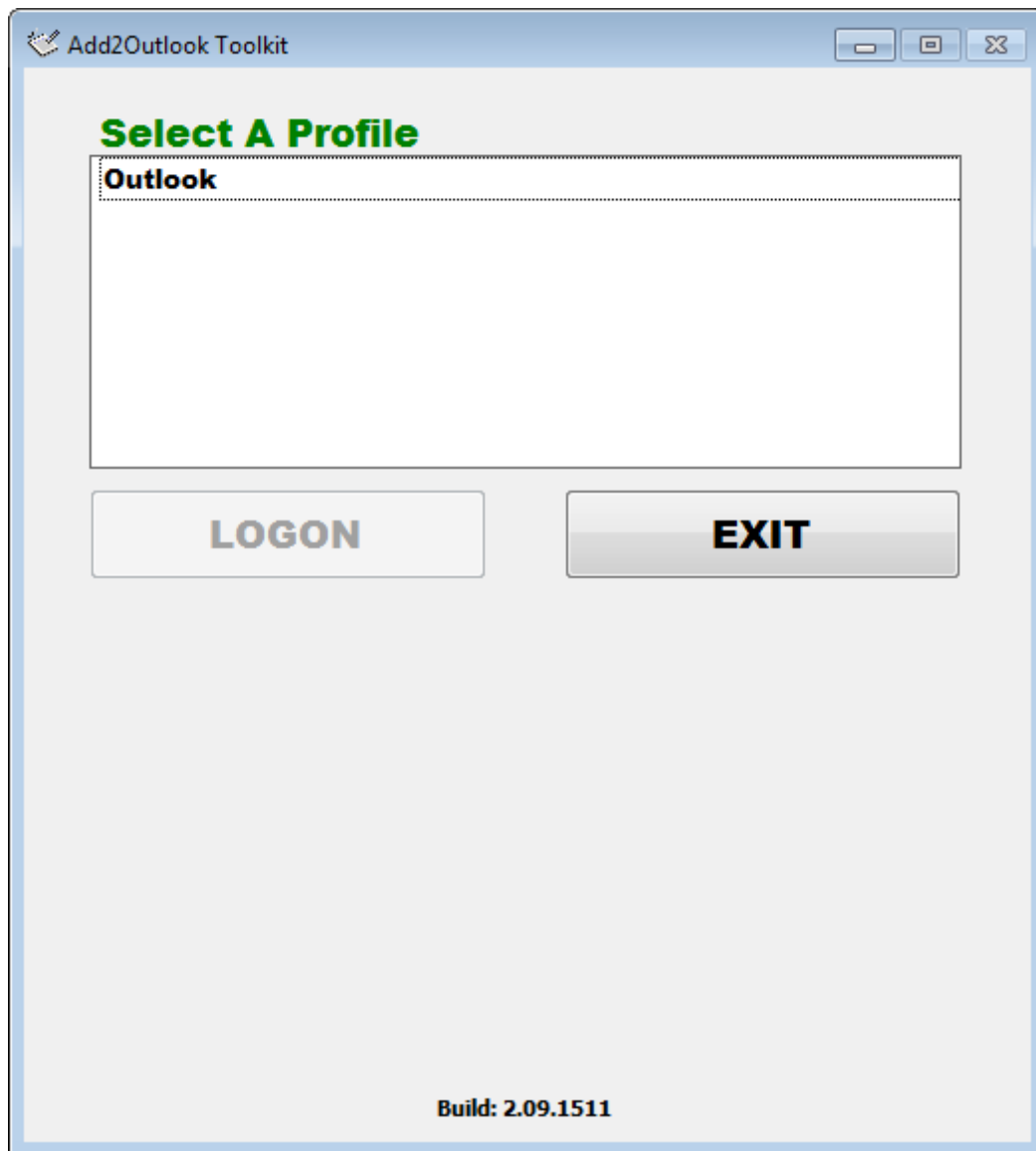
- Click *Close*

You have successfully installed Add2Outlook ToolKit!

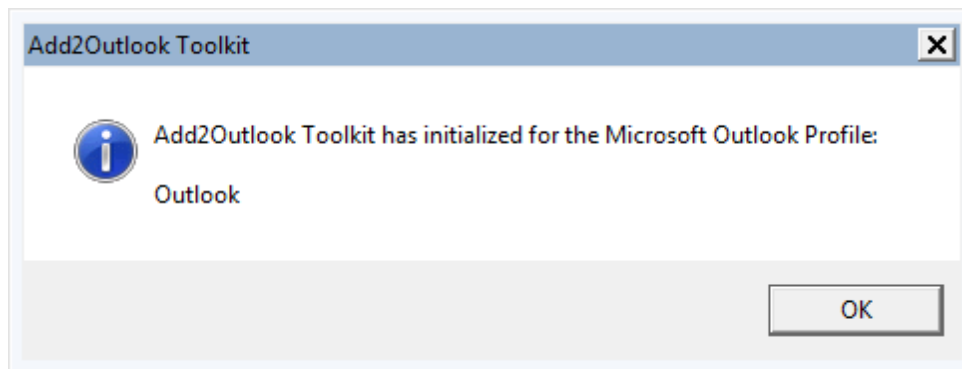
4 Usage

To start Add2Outlook ToolKit:

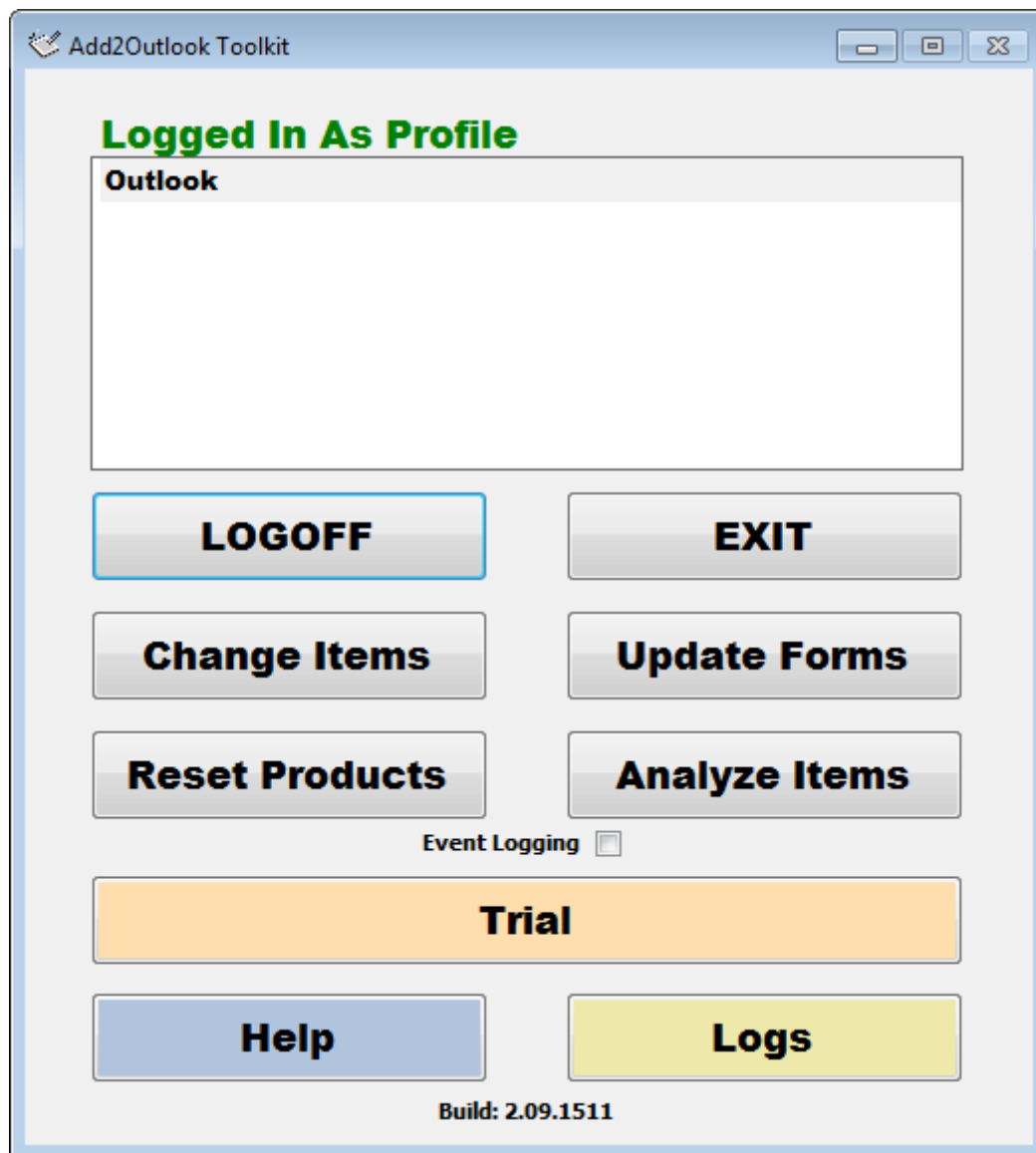
- Go to *Start Menu > All Programs > OpenDoor Software > Add2Outlook Toolkit*
- Click *Add2Outlook Toolkit*



- Select the appropriate profile ("Outlook" is your default Outlook profile)
- Click *Logon*



- Click *OK*



Buttons

Change Items

Change the fields on an item or copy item fields. See the [Change Items](#)^[12] section for details.

Update Forms

Change the form or item type of a folder of items. See the [Update Forms](#)^[16] section for details.

Reset Products

Remove Add2Outlook copies or remove hidden Add2Outlook fields from a folder of items. See the [Reset Products](#)^[18] section for details.

Analyze Items

Determine whether items are Add2Outlook copies or have hidden Add2Outlook fields. See the [Analyze Items](#)^[20] section for details.

Logoff

Disconnect so you may choose a different profile and reconnect.

Exit

Exit the application.

Trial

This button indicates whether you are in trial mode or are licensed. Click it to request a license key by filling out the request form that follows.

Logs

Open the Event Viewer administrative tool to see our log entries. Only logs if the *Event Logging* checkbox has been enabled.

Help

Open the included help file.

4.1 Change Items

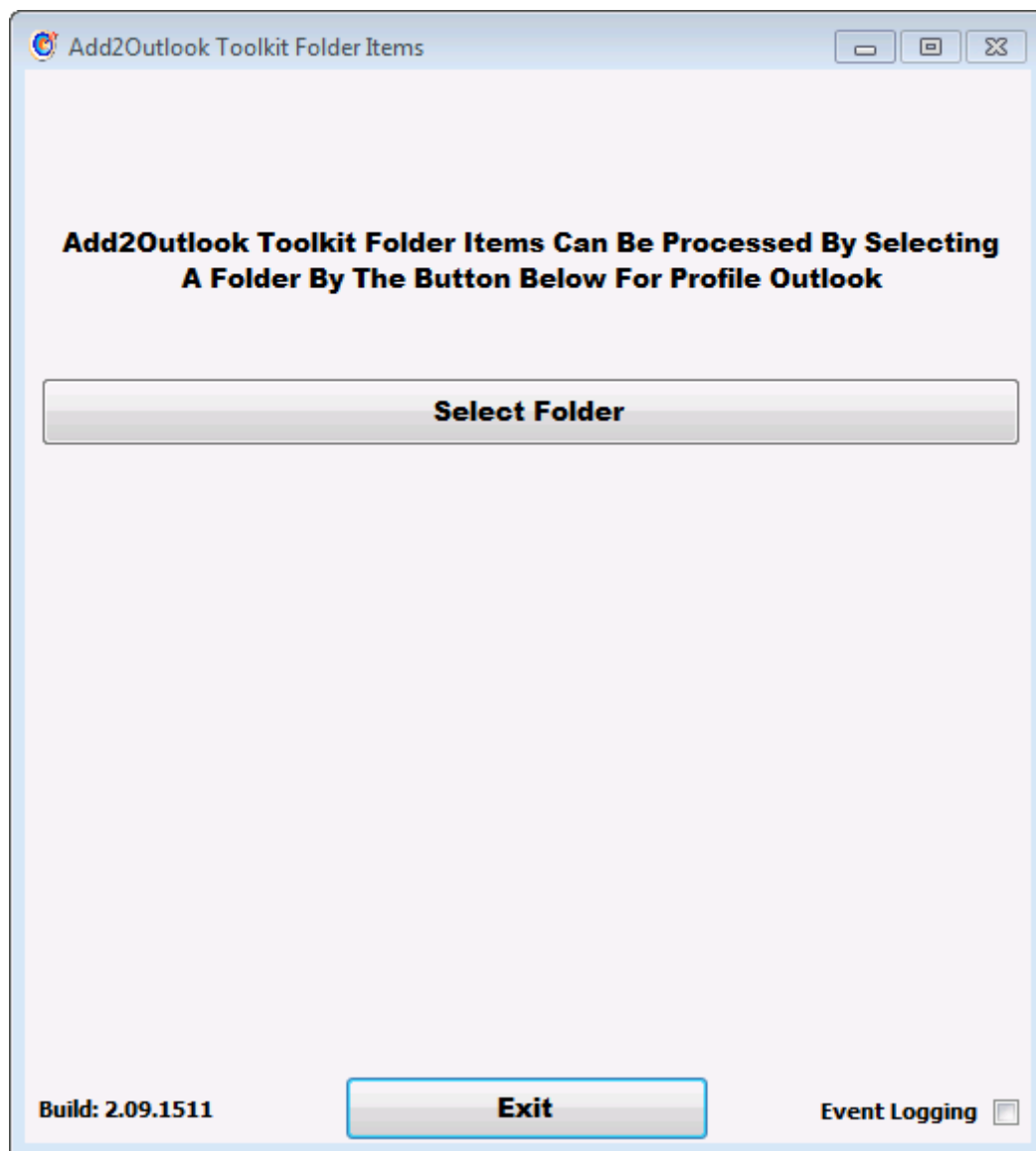
Change Items allows you to make changes to a folder of items, including the ability to change the subject of appointment items as well as the *File As* field of contacts.

This is particularly useful if you have a folder full of items that have the subject tagged with the word "Deleted: ", which is added by some configurations of Add2Outlook relationships.

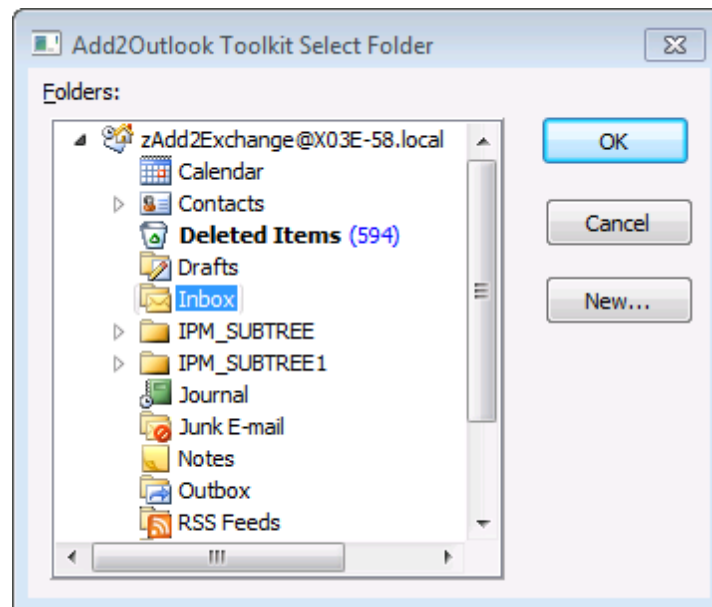
Another case where this feature is useful is when you've used the *Autopop* feature to tag copies with a piece of text, usually a tag representing the folder where the item originated.

Separately, you can also use this function to copy the contents of one item field to another field for an entire folder of items. For example, you can copy the *Business Phone* field to the *Mobile Phone* field.

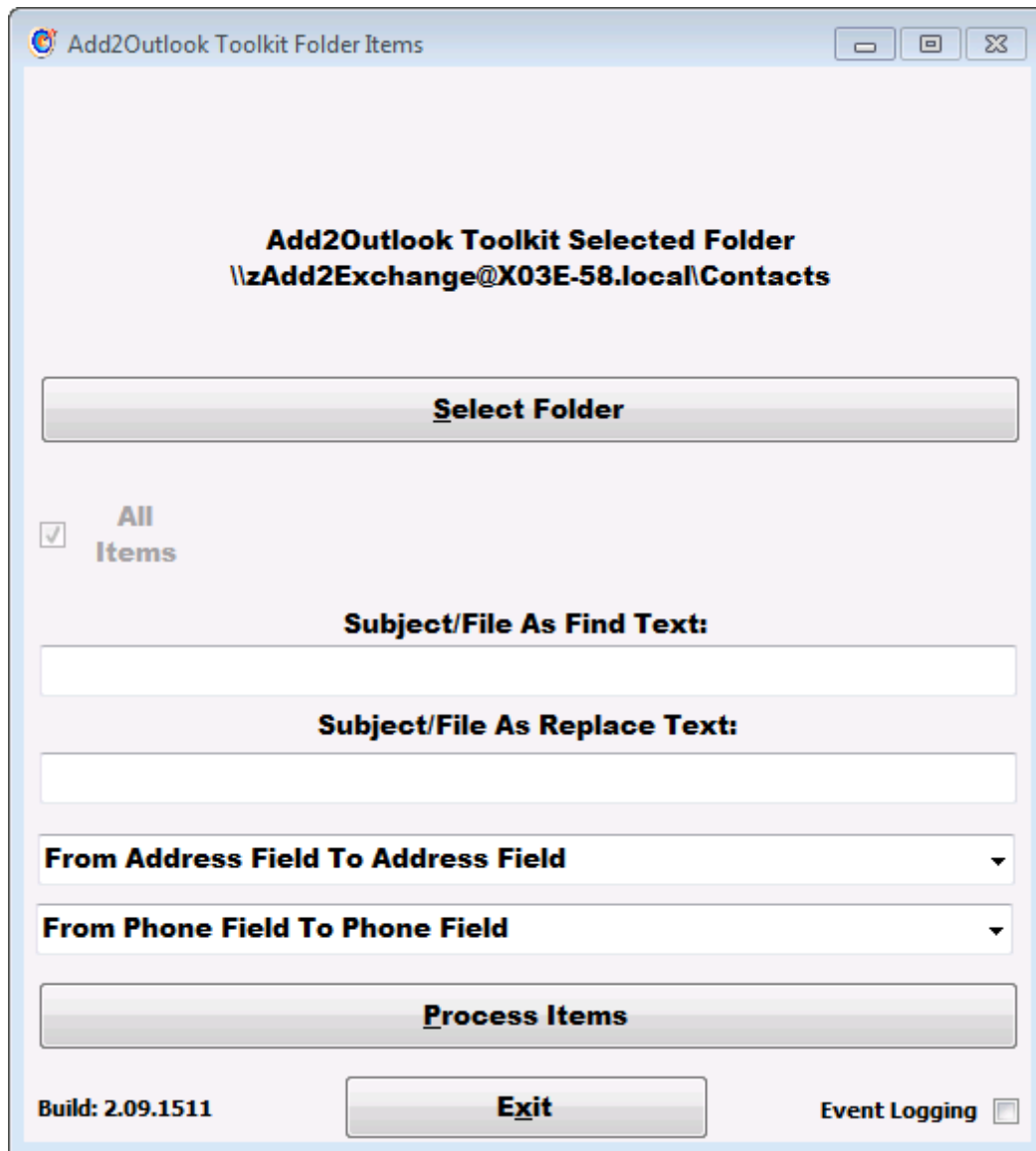
- Click *Change Items*



- Click *Select Folder*



- Select the folder containing the items you want to change



There are two separate functions.

Find and replace

The first two fields allow you to specify find and replace text for item *Subject* (normal items) and *File As* (contact items) fields.

Only specify the substring you are looking to replace in the *Find Text* field. As an example, you might specify "Deleted: " (without quotes) if you are trying to eliminate the Add2Outlook deletion marker.

Copy Fields

You may also use this function to copy the contents of one field to another. The list of source and destination fields is in the dropdown.

You may copy up to two fields at a time by using both of the dropdowns. However, you may *not* use this function to swap field contents. It is not designed to do that and you will lose data if you try to do so.

To run either of the functions, click *Process Items*.

You are done.

4.2 Update Forms

Update Forms allows you to change the form or item type associated with all items in a folder.

Forms are the additional fields and layouts associated with custom item types in Outlook. See the Microsoft Office article describing forms for more details here:

<http://office.microsoft.com/en-us/outlook-help/tutorial-creating-and-distributing-custom-forms-with-outlook-HA001210610.aspx>

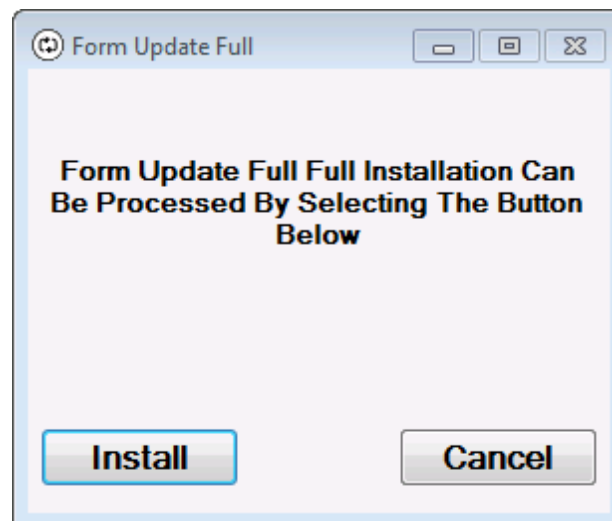
The item type is the class associated with an item, such as IPM.Appointment or IPM.Contact. Forms are usually set with this field as well, so both of these functions really work on the same field, just with different results.

You can find more information on the technique used by the tool here:

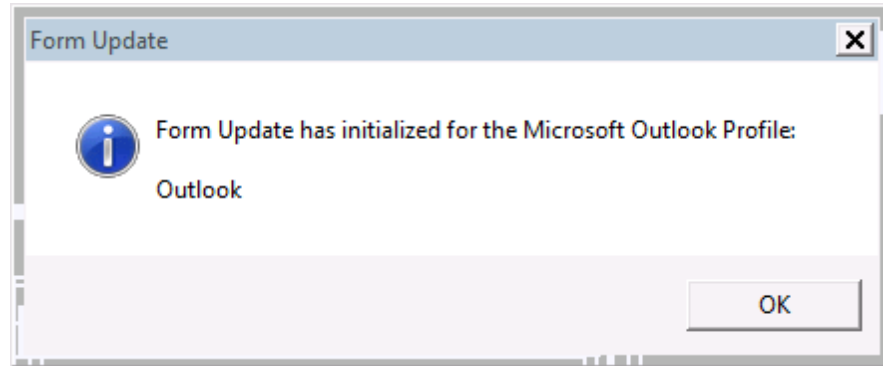
<http://support.microsoft.com/kb/201087>

The Form Update tool is actually a separate Outlook add-in that is installed by the Toolkit the first time you try to run it. It requires Outlook, since it is an add-in.

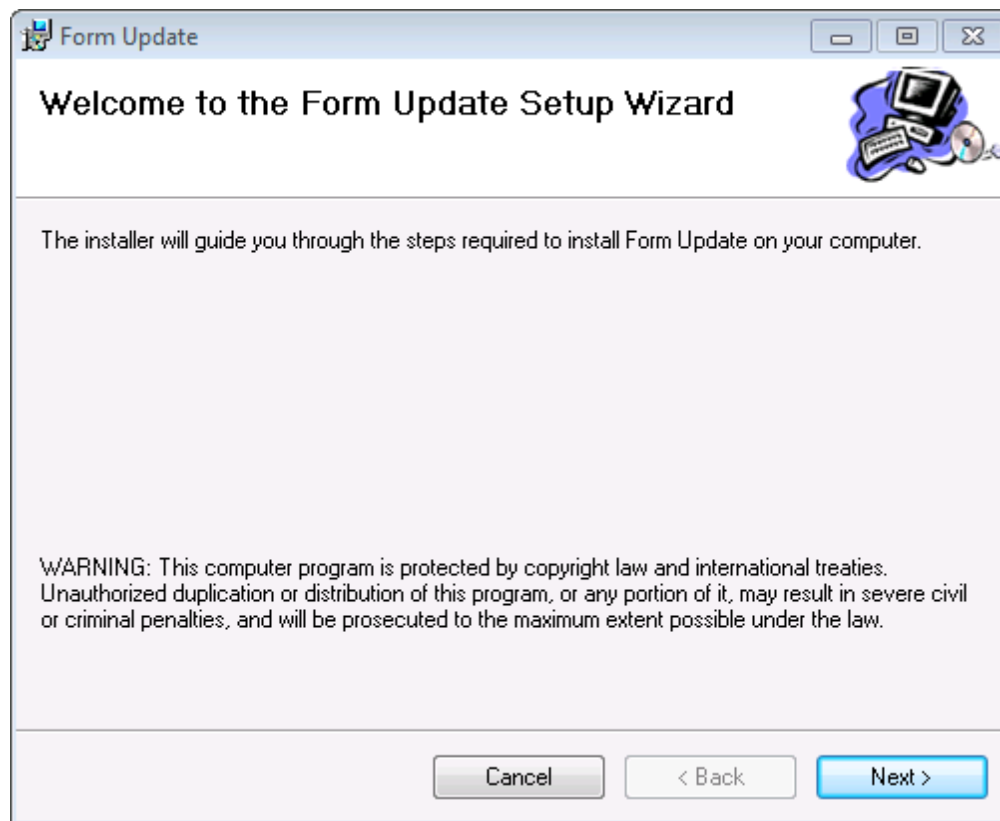
- Click *Update Forms*



- Click *Install*

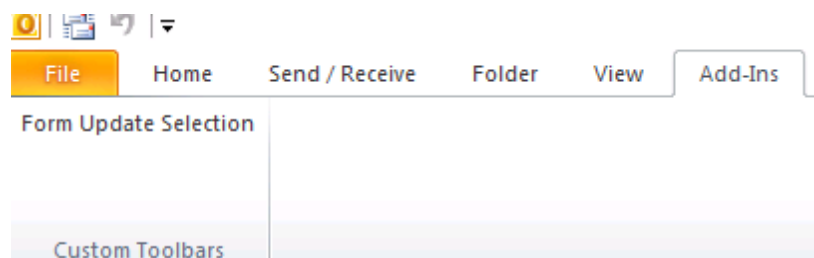


- Click *OK*

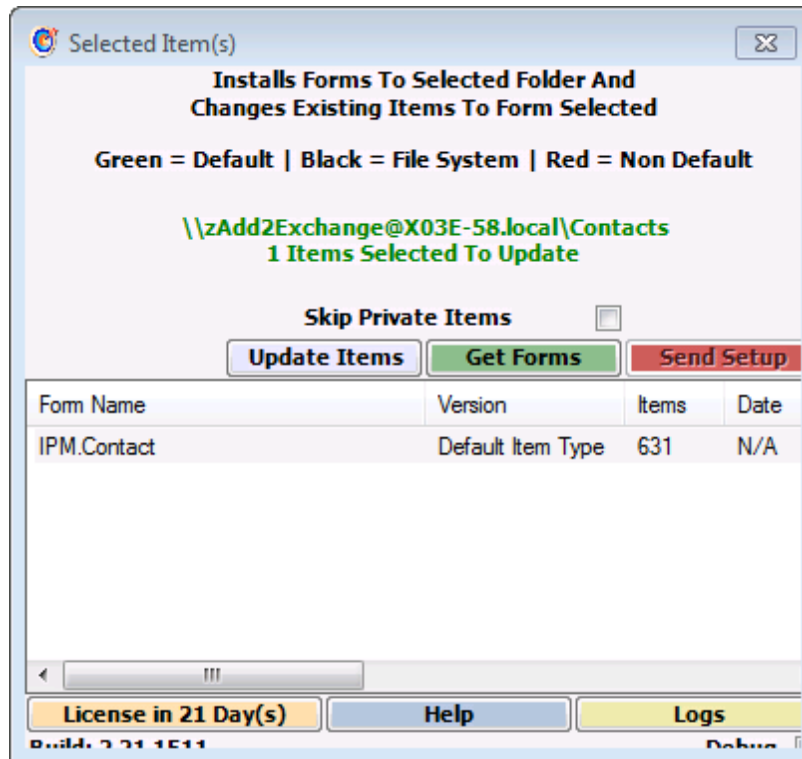


- Click *Next >*

Once the installer has completed, open Outlook, select the folder you are interested in and select the *Add-Ins* tab.



- Click *Form Update Selection*



- Click *Get Forms*

The dialog will show you the available forms/message classes which are already in the folder.

- Select the form/message class you would like to assign to all items
- Click *Update Items*

The process will run and the items will be updated.

Skip Private Items

If there are items in the folder over which you don't have permissions, checking this checkbox will tell the process to skip these items rather than erroring.

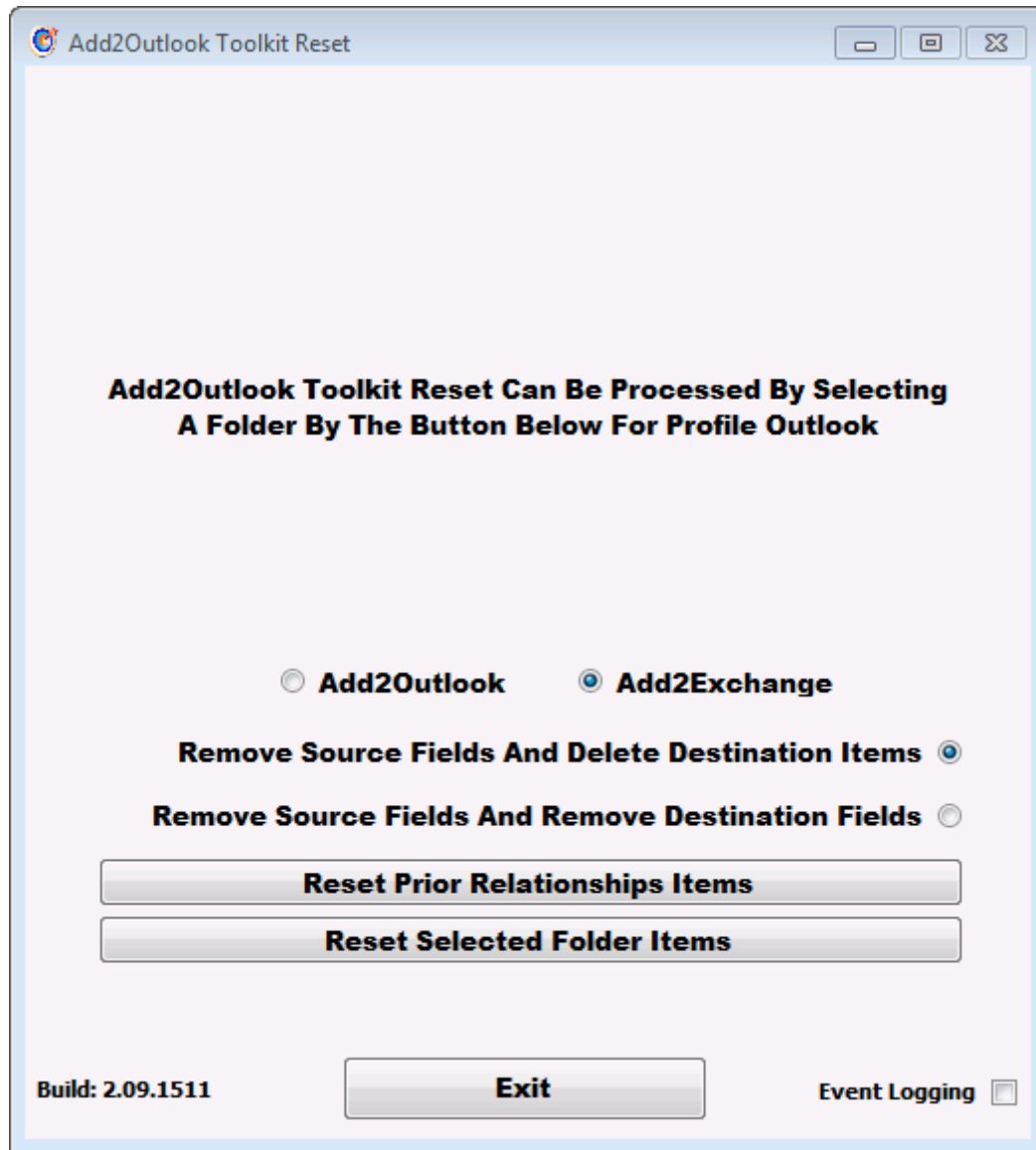
You are done.

4.3 Reset Products

Reset Products clears out Add2Outlook copies or removes hidden Add2Outlook fields from items in a folder.

This is useful when you've gotten rid of an Add2Outlook relationship and left the copies in place. If the copies are unwanted, this tool can remove them for you. If the copies are wanted, but you also want to use them as the source of another relationship, the hidden fields on the items need to be removed before Add2Outlook will copy them elsewhere.

- Click *Reset Products*



Note: Do not use this tool to clean Add2Exchange items. The version of Add2Exchange targeted by the tool is obsolete and it does not work for the latest versions of Add2Exchange.

- Decide between removing destination items or just cleaning them
 - Choose *Remove Source Fields And Delete Destination Items* if you want to remove the copies
 - Choose *Remove Source Fields And Remove Destination Fields* if you just want to clean the hidden fields from the items so, for example, they may be used in other relationships
- Decide between picking a folder or a relationship
 - Choose *Reset Prior Relationship Items* if you have an existing relationship pointing to the correct folders. Note that this will also remove all hidden fields from items in the source folder, which is useful when you have a source with some copies mixed in that you would like to copy
 - Choose *Reset Selected Folder Items* if you would like so simply select one folder. In this case, there is no source folder, so nothing additional will be done.
- Select the relationship or folder as appropriate

You are done.

4.4 Analyze Items

To see what hidden fields items in a folder have, as described in the Reset Products section.

- Click *Analyze Items*
- Select the folder in question

View the output report.

You are done.