



# Getting Started

Configuring OFS Basic 2.4.7

January 2010

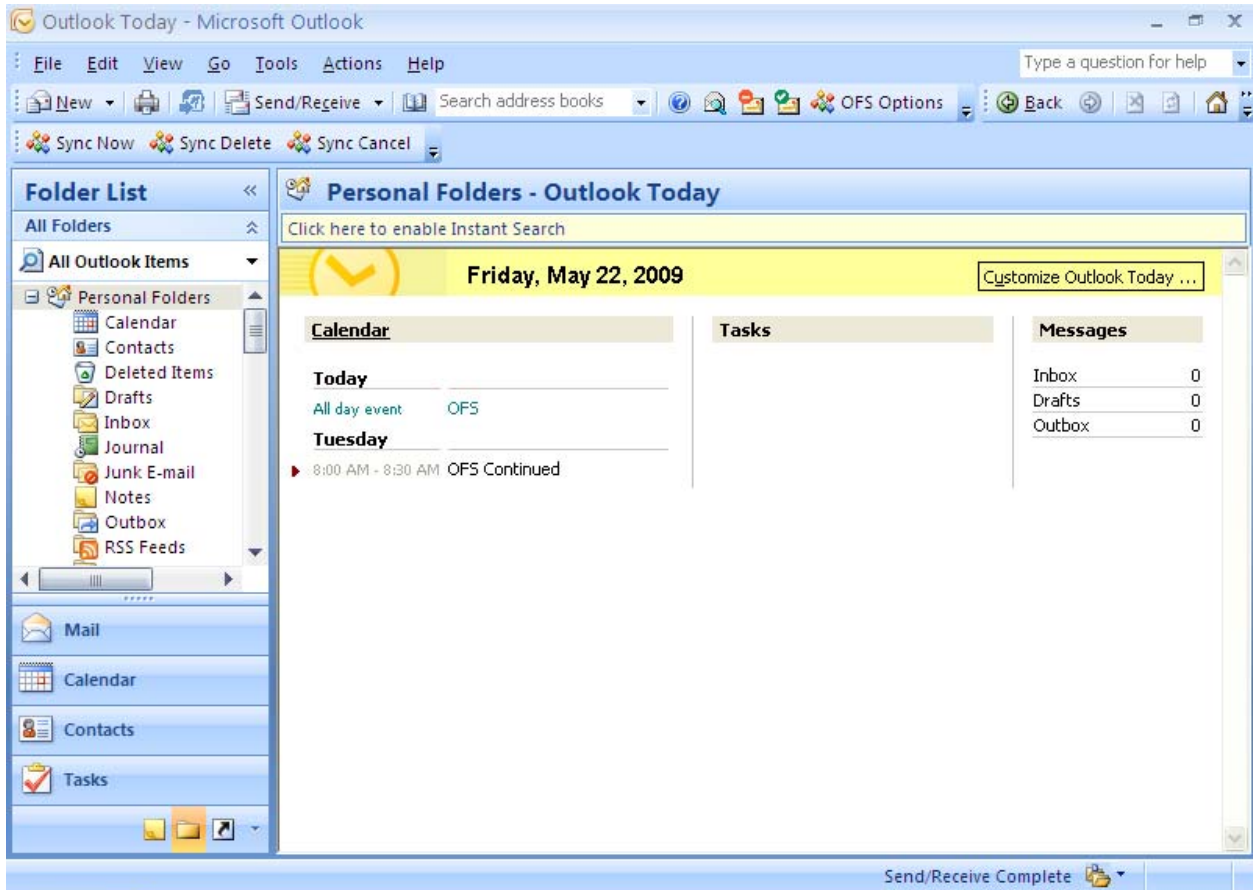
**This manual explains how to configure OFS Basic 2.4.7.**

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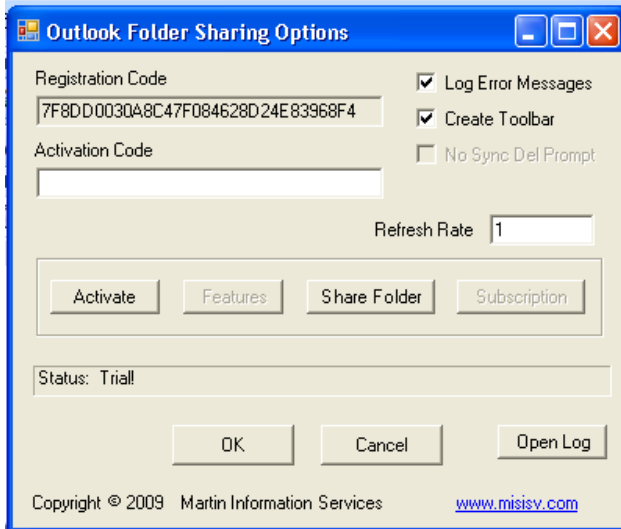
## Accessing OFS Configuration

Once you have installed OFS Basic you will see “OFS Options” on your toolbar. To begin configuring OFS, click on “OFS Options”. If you do not see this on your toolbar, close outlook for 20 seconds and open it again.

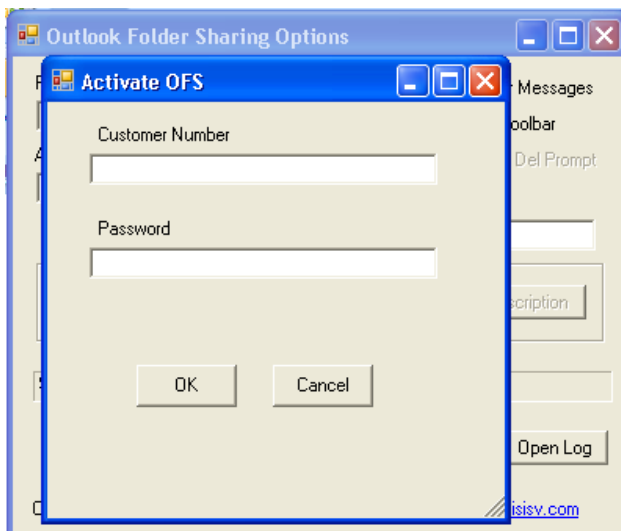


## Activating OFS Basic

Once you have purchased OFS Basic, you will receive an email with a customer number and password, click on “Activate” to bring up the activation window.



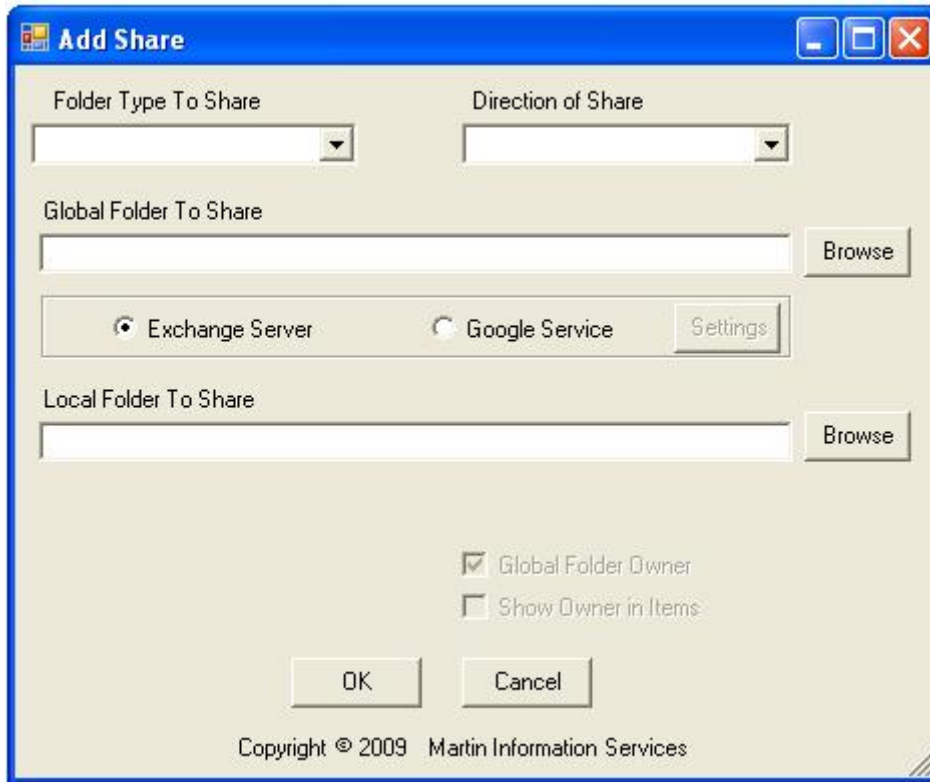
Enter the customer number and password sent to you via the email account you used at purchase into the below fields and click “OK” to confirm activation. The “Activation Code” field should no longer be blank and the “Status” will no longer be set to “Trial”.





## Selecting a Folder Type

Once you have selected to “Add” a share, you must select what you want to share from the drop down list.



Your “Folder Type To Share” choices are Calendar or Contact.

Proceed to “Selecting the Share Direction” on Page 5.

## Selecting the Share Direction

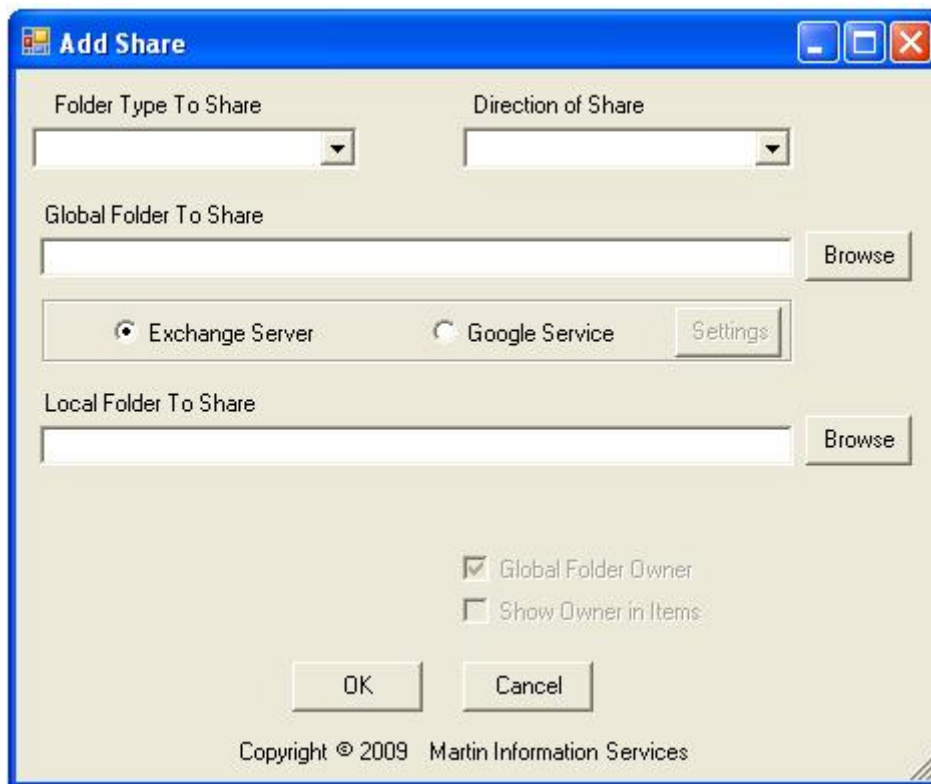
Next you will need to select the direction you want to share.

You have three methods of sharing to choose from the drop down list:

**Global to Local Only** – Sync Global (public folder or mailbox) to Local (personal folder or mailbox)

**Local to Global Only** – Sync Local (personal folder or mailbox) to Global (public folder or mailbox)

**Both** – Sync all entries in defined share from (global to local) and (local to global)



Proceed to “Selecting Exchange or Google Service” on Page 6.

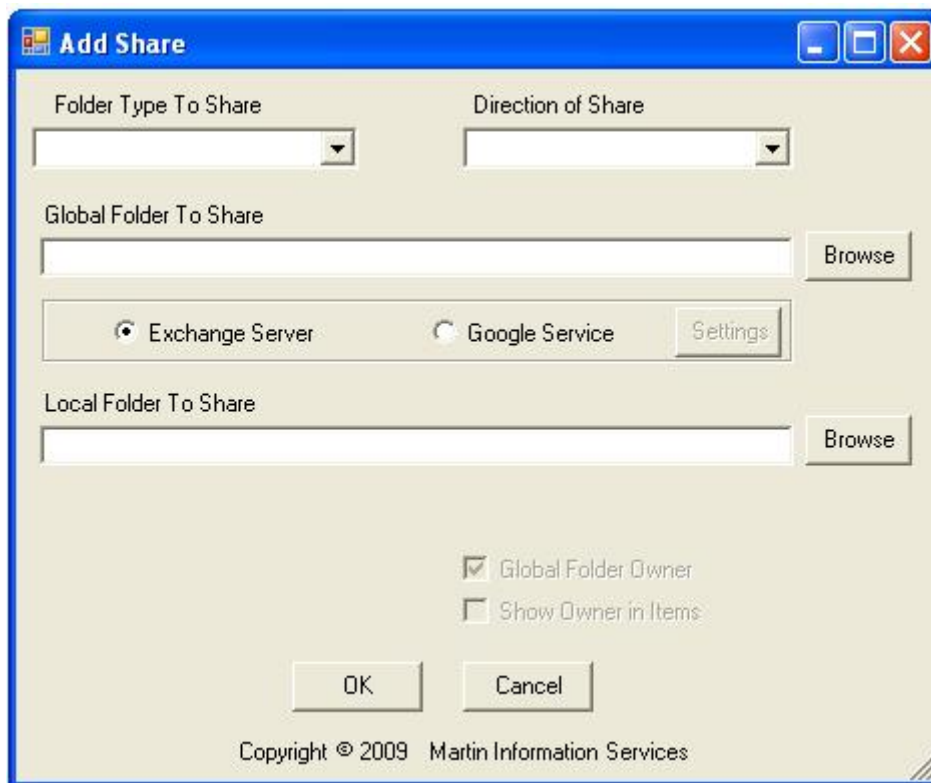
## Selecting Exchange or Google Service

Next you will need to select the service you will use to share.

You have two services to choose from :

Exchange Server – Microsoft Exchange Server

Google Service – Google Calendar and Google Contacts Service



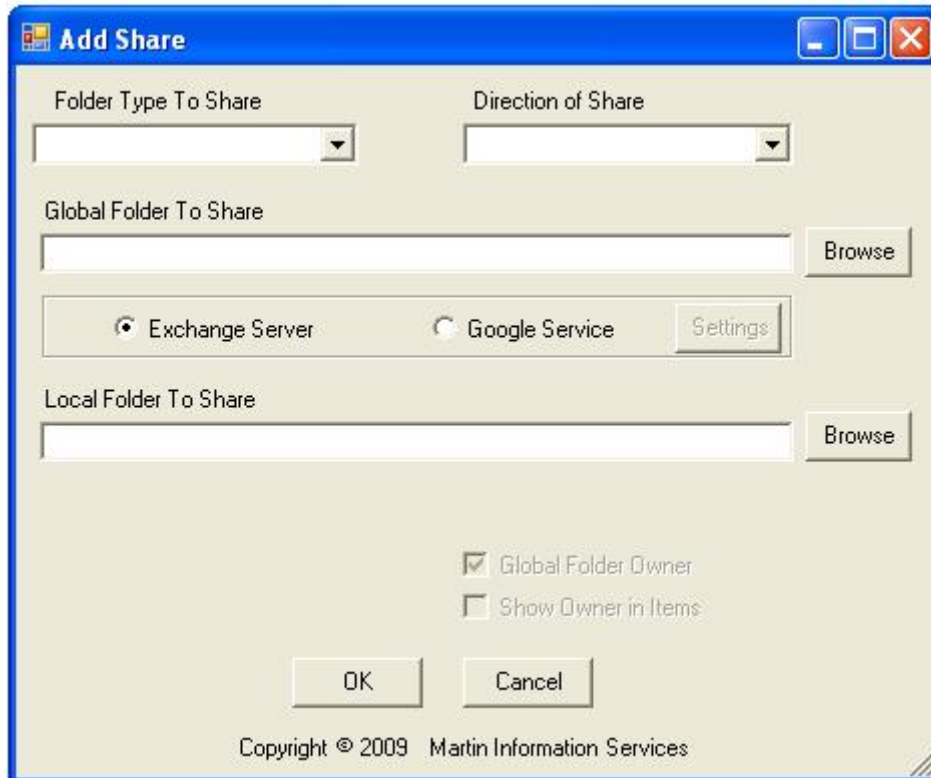
If you select Exchange Server as your service, proceed to “Selecting Your Exchange Global Folder” on Page 7.

If you select Google Service as your service, proceed to “Setting your Google Service Settings” on Page 8.

## Selecting Your Exchange Global Folder

Next you will need to select the Exchange Global Folder you will use to share.

You start by clicking the Browse Button next to the “Global Folder To Share” box.



If you are not using Exchange Server as your service you will receive an error message. Otherwise a Browse Global Folders Window will appear with a list of global folders available for choosing (as seen on Page 14). Please note that you can only select a folder with a match for the type of folder you are sharing. (ie. Calendar requires a calendar folder, Contacts requires a contact folder)

Once you select your Global Folder, proceed to “Selecting Your Local Folder” on Page 11.

## Setting Your Google Service Settings

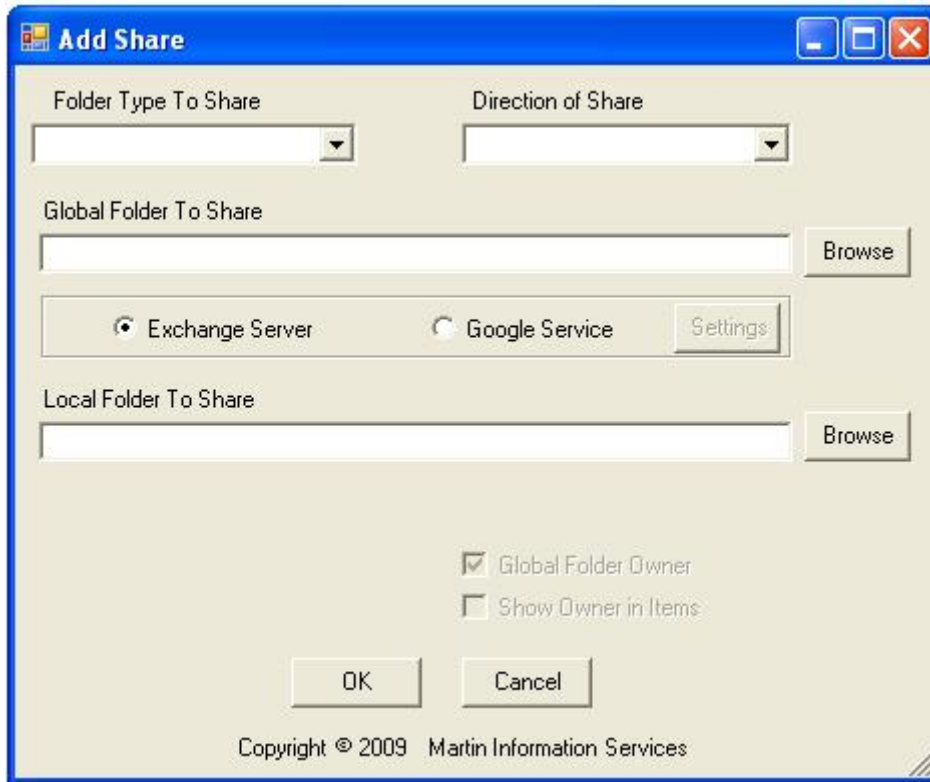
Next you will need to setup the “Google Service” settings.  
You start by clicking the Settings Button next to “Google Service”.



Enter your Google Username and Password for either the Calendar Service or Gmail Contact Service. Once you are done entering the information, proceed to “Selecting Your Google Global Folder” on Page 9.

## Selecting Your Google Global Folder

Next you will need to select the Google Global Folder you will use to share. You start by clicking the Browse Button next to the “Global Folder To Share” box.



If you are sharing a calendar proceed to “Selecting Your Google Calendar Folder” on Page 10.

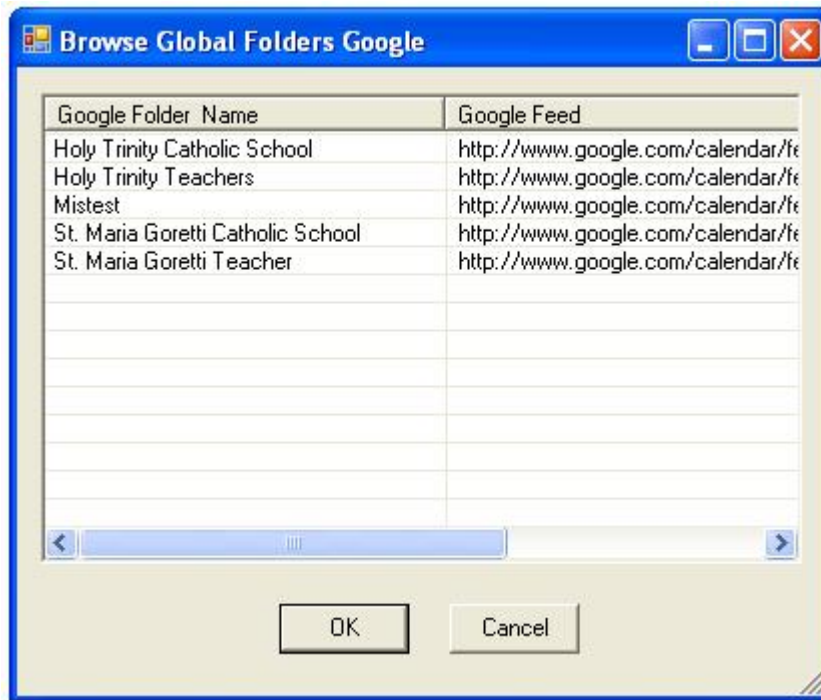
If you are sharing contacts when you click the browse button, OFS will automatically fill in the Global Folder reference using the information entered in the “Google Settings” step.

Once you select your Global Folder, proceed to “Selecting Your Local Folder” on Page 11.

## Selecting Your Google Calendar Folder

Next you will need to select the Local Folder you will use to share.

You start by clicking the Browse Button next to the “Local Folder To Share” box.



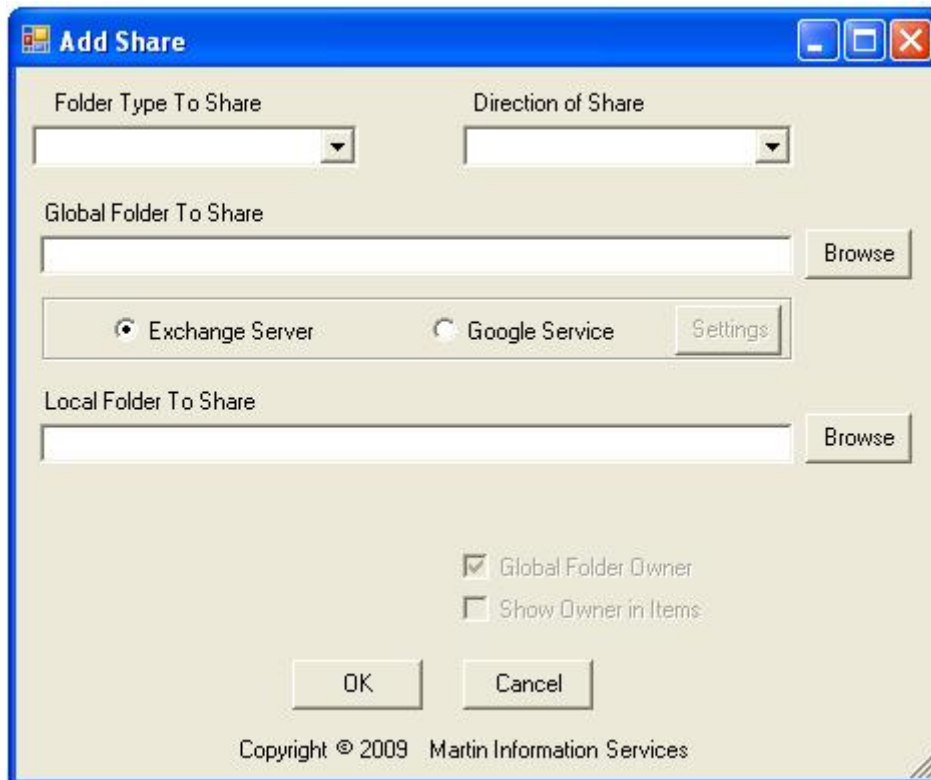
Select the Calendar you want to share from the Google Calendar Service. Please note that this list should display all calendars bound to the username and password you entered into the “Google Settings” window. Just highlight the calendar you want to share and click the “OK” button.

Once you select your Global Folder, proceed to “Selecting Your Local Folder” on Page 11.

## Selecting Your Local Folder

Next you will need to select the Local Folder you will use to share.

You start by clicking the Browse Button next to the “Local Folder To Share” box.



A Browse Local Folders Window will appear with a list of global folders available for choosing (as seen on Page 14). Please note that you can only select a folder with a match for the type of folder you are sharing. (ie. Calendar requires a calendar folder, Contacts requires a contact folder)

Once you select your Local Folder, proceed to “Additional Share Settings” on Page 12.

## Additional Share Settings (Continued)

**Days to Process** – “Days to Process is the number of days from the current day that you want synchronized. It supports up to 365 days.

**Do Not Sync Accepted Appointments** – Select this setting if you do not want accepted appointments synchronized. (Currently Inactive Feature)

**Global Folder Owner** – Only the owner of the folder should check this selection, there can only be one owner. (Currently Inactive Feature)

**Show Owner in Items** – Shows you who is the owner of the folder. (Currently Inactive feature)

The screenshot shows the 'misFormEditShare' dialog box. The 'Folder Type To Share' is set to 'Calendar'. The 'Direction of Share' is set to 'Global To Local Only'. The 'Global Folder To Share' is '\\Public Folders\\All Public Folders\\MIS Public Folders\\Appointment Books\\Te'. The 'Local Folder To Share' is '\\Personal Folders\\Calendar'. The 'Days to Process' is set to 15. The 'Do Not Sync Accepted Appointments' checkbox is unchecked. The 'Global Folder Owner' and 'Show Owner in Items' checkboxes are checked. The 'OK' and 'Cancel' buttons are visible at the bottom. The copyright notice 'Copyright © 2008 Martin Information Services' is at the bottom right.

Once you have finished configuring the share click the “OK” button to save.

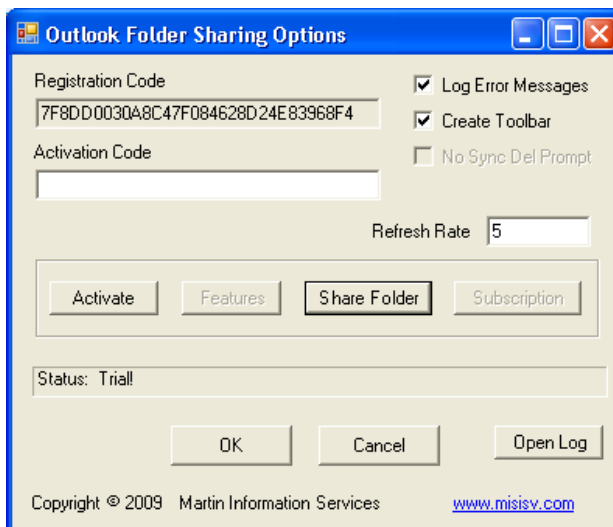
Proceed to “Additional OFS Settings” on Page 13 or repeat the Add Share process to add another share.

## **Additional OFS Settings**

**Log Error Messages** – Creates a log that will help troubleshoot OFS if any errors occur (Recommended if you are having problems).

**Create Toolbar** – Creates the OFS toolbar in Outlook when you startup Outlook.

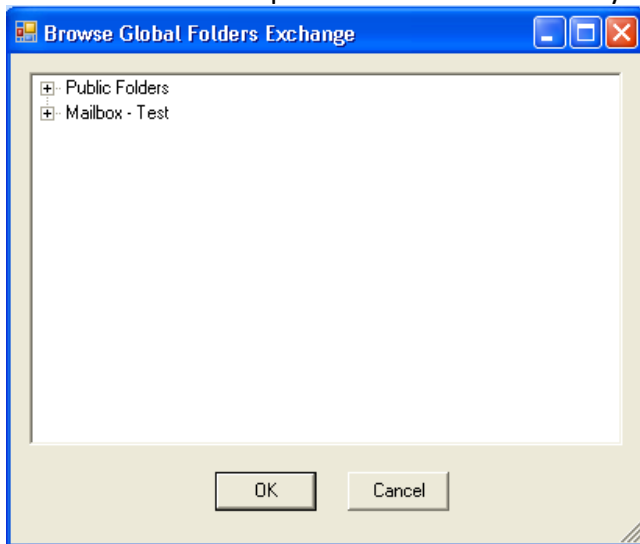
**Refresh Rate** - The refresh rate is how often (in minutes) it will try and sync each share that has been configured in OFS.



Click the "OK" button to close the "Outlook Folder Sharing Options" window.

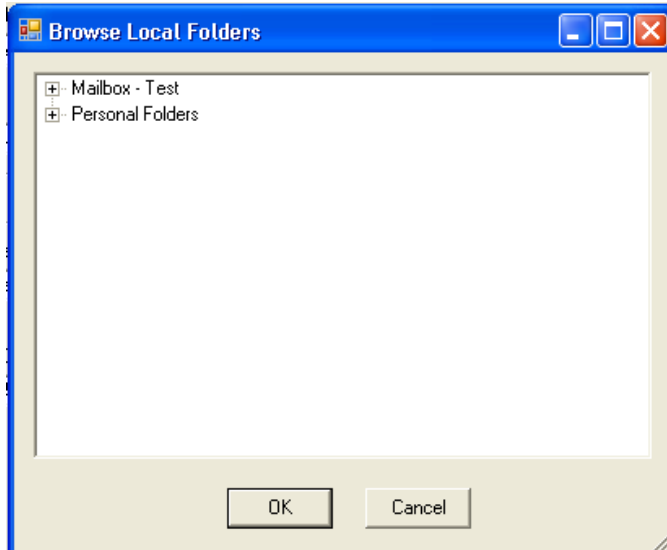
## Locating your Global Folder to Share

Once you have selected the folder type and share direction, you can browse to the items you want synchronized. Displayed below is the result of clicking “browse” to search for your global items, notice you are only given the options of Public Folders (Global) and Mailbox. Dropping down the “+” will expand the menu and show you the subfolders and content of those items.



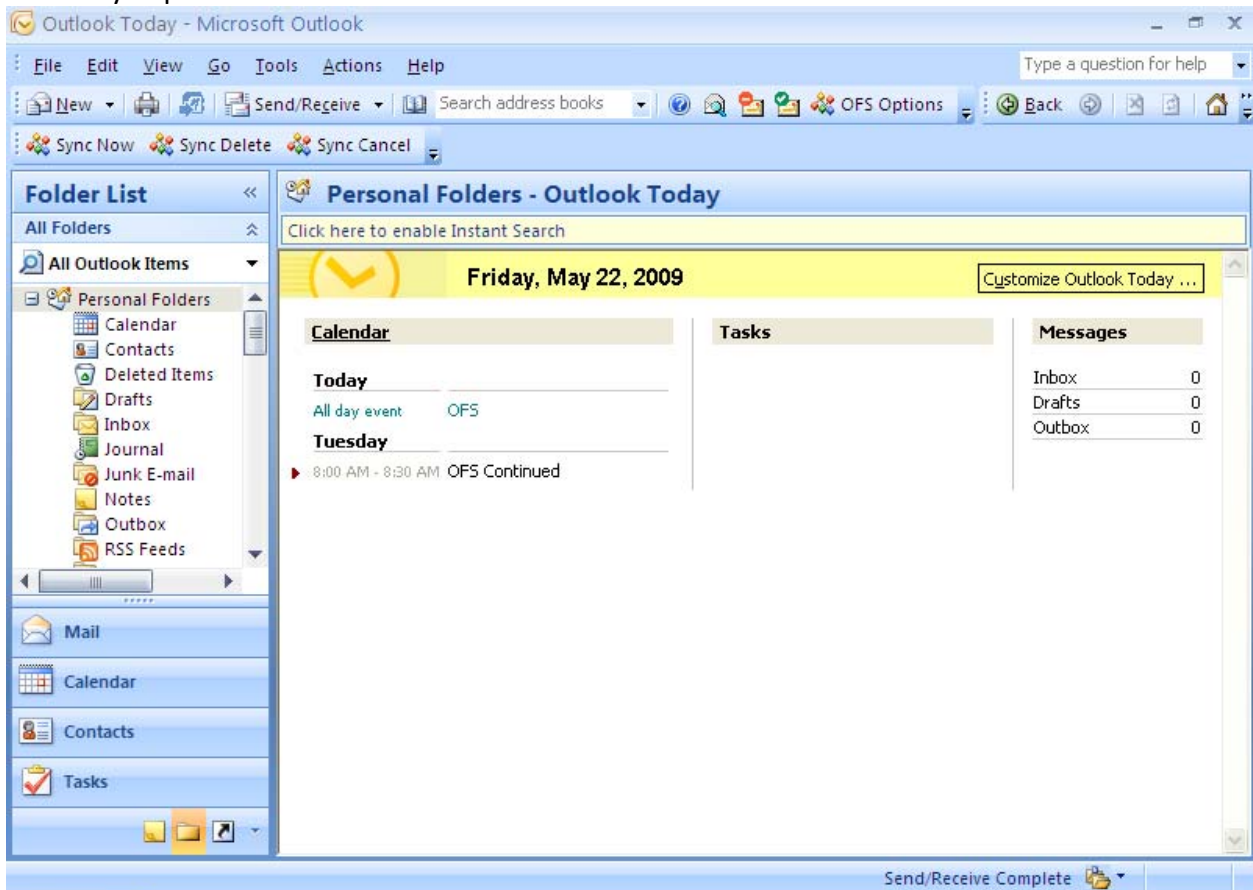
## Locating your Local Folder to Share

Once you have selected your global folder to share, now you must select your local folder. Notice this time, you are not given the option to select items from your public folders; that is because your public folders are global entries and personal folders is for local entries. Drop down the “+” sign to navigate to your desired folder.



## OFS Toolbar

On the OFS toolbar, “OFS Option” will take you to your current configuration. “Sync Now” will allow you to sync all entries you configured instantly. “Sync Delete” will delete a selected item from the folder you synced from and to. “Sync Cancel” cancels a synchronization that is currently in process.



## **Suggested Steps for Setting up Google Calendar Sharing**

1. Setup a free Google Calendar account at

<https://www.google.com/accounts/ServiceLogin?service=cl&passive=true&nui=1>

**Or if you setup a G-Mail account you can use it for the Calendar account as well.**

2. Once you have the username and password, you can share this information with other users of OFS to synchronize calendars using the Google Calendars tied to the account. Or you can have each person setup their own Calendar Account. Once they have their account you can link their account to have access to your Google calendar. This second method allows you to control through Google what access each user has to the calendar.

3. To share the Calendars but control who can update we recommend the following scenario.

All updates done from Web, read only for all Outlook users

- a) All users set their share up with "Global to Local" [Direction of Share].

Only Primary User updates from Outlook, read only for all other users on web and in Outlook.

- a) The primary user sets their share up with "Local to Global" [Direction of Share].
- b) All other users set their share up with "Global to Local" [Direction of Share].

Only Primary User updates from Outlook or Web, read only for all other users in Outlook.

- a) The primary user sets their share up with "Both" [Direction of Share].
- b) All other users set their share up with "Global to Local" [Direction of Share].

## **Suggested Steps for Setting up Google Contact Sharing**

1. Setup a free G-Mail account at [www.gmail.com](http://www.gmail.com).
2. Once you have the username and password, you can share this information with other users of OFS to synchronize contacts using the Google Contacts.
3. To share the contacts but control who can update we recommend the following scenario.

All updates done from Web, read only for all Outlook users

- b) All users set their share up with "Global to Local" [Direction of Share].

Only Primary User updates from Outlook, read only for all other users on web and in Outlook.

- a) The primary user sets their share up with "Local to Global" [Direction of Share].
- b) All other users set their share up with "Global to Local" [Direction of Share].

Only Primary User updates from Outlook or Web, read only for all other users in Outlook.

- a) The primary user sets their share up with "Both" [Direction of Share].
- b) All other users set their share up with "Global to Local" [Direction of Share].