

USER'S MANUAL

CODETWO

PUBLIC FOLDERS

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1. Introduction

CodeTwo Public Folders is an Outlook extension, allowing many network users to share their resources with each other. All users can work with the same data simultaneously. Each change in the shared folders made by one user becomes immediately visible to other users. Users can create, edit and delete folders and items of any type available in Outlook (calendars, contacts, email messages, tasks, journals, notes) and even create folders with Office documents (such as Word docs or Excel spreadsheets).

From the user's point of view, working with shared folders looks exactly the same as working with Outlook personal folders. This is a considerable advantage as users do not have to learn to operate the new software and can start using Outlook for group work immediately.

Installation

Installation and configuration of the software is straightforward. First install the Syncing Master on one of the computers in the local network (does not require any configuration). Then, install the Outlook Add-in on the machines you want to have access to the shared folders. More information can be found in the [installation](#) section (see page 5).

Examples of Practical Application

Thanks to its multiple capabilities CodeTwo Public Folders can be used in companies in a number of scenarios of group work. Here are the selected application examples: keeping a shared calendar and schedules, booking resources in calendars, sharing personal calendars, sharing company contact database and address book, creating a shared inbox for all mail, holding discussions in discussion groups, managing projects using task items, delegating tasks, sharing document library. More information about examples of practical application can be found on our webpage <http://www.codetwo.com/public-folders/examples-of-application/>

Sharing Personal Folders

The publishing (sharing) of personal folders feature allows users to share their personal resources with the people they work with on a day-to-day basis. More information can be found in the [sharing personal folders](#) section (see page 19).

Sharing Public Folders

In the shared public folders in Outlook, users can share data and work simultaneously, creating group calendars, contact lists, shared inboxes and outboxes, group tasks, etc. More information can be found in the [sharing public folders](#) section (see page 18).

Access Rights to Shared Folders

Access rights to the shared folders can be freely defined by their owners and administrators using a convenient user interface. More information can be found in the [access rights management](#) section (see page 23).

Offline Mode

It is possible to work with data in public folders even when a computer is not connected to the network. All changes in that case will be saved locally and synchronized with the data on the Syncing Master once the connection is restored. The ability to work in the offline mode is especially helpful for users who are often outside the office and use portable computers. More information can be found in the [offline mode](#) section (see page 26).

2. Installation

The installation of CodeTwo Public Folders is very straightforward and consists of only two steps:

1. First, install* Syncing Master on one of the computers in the network - the module does not require any configuration and its installation is completed in 3 clicks.

2. Next, install the Outlook Add-ins of CodeTwo Public Folders on the remaining computers that will share Outlook data. While installing the Add-ins point to the computer hosting the Syncing Master.

* To quickly test the program's functionality, you do not need to install the Syncing Master at all. Install only the Microsoft Outlook Add-in on one or several computers and connect to the Syncing Master hosted on our Internet server.

The installation of the Outlook Add-in as well as the Syncing Master is initiated from the same installer file, see Fig. 1.

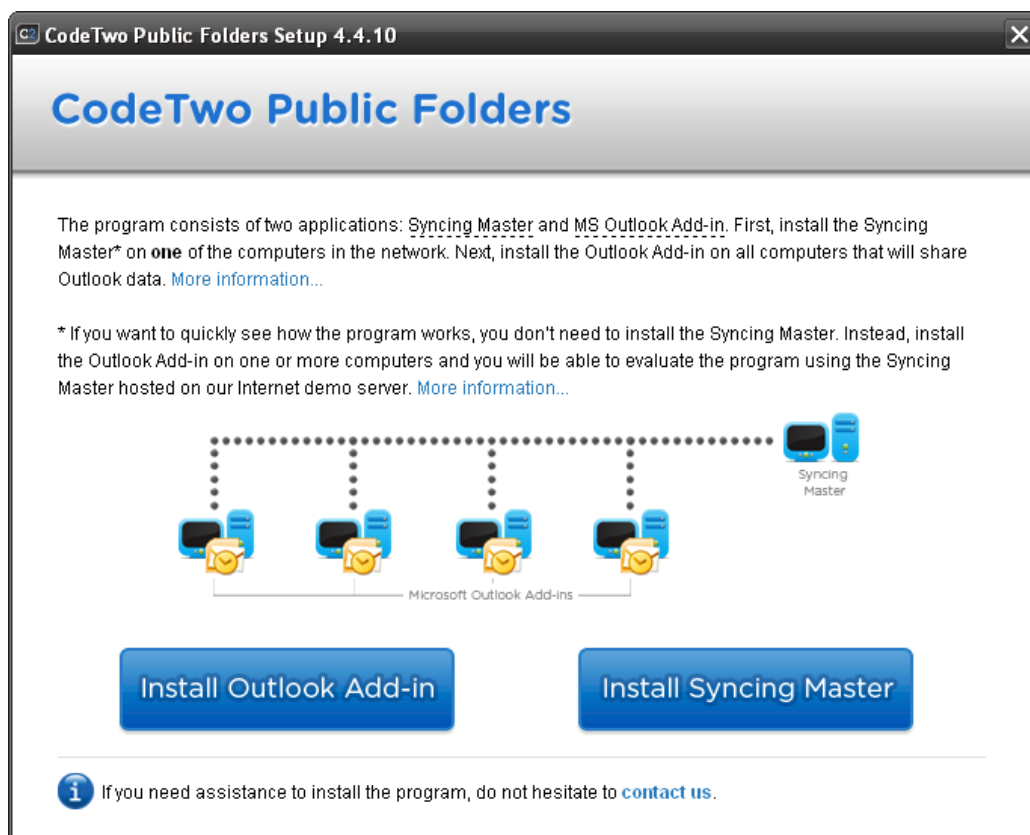



Fig.1 The installation of the Outlook Add-ins and the Syncing Master is initiated from the same installer file. On running the installer, you need to choose which module of the program will be installed to the current machine.

2.1. Installation of Microsoft Outlook Add-ins

Requirements: Windows 7 / Vista / 2003 / XP / 2000

Microsoft Office Outlook 2010 / 2007 / 2003 / XP (2002) / 2000* / 98*

* Microsoft Office Outlook in v.2000 and 98 must be installed in Company or Workgroup Mode and the latest Service Pack must be installed.

-  If you do not want to use the Syncing Master hosted on our Internet server, to share data between Outlook Add-ins, install the Syncing Master in your local network before you install the Add-ins.

Microsoft Outlook Add-in of CodeTwo Public Folders must be installed on each computer that will share Microsoft Outlook data. The Outlook Add-ins are connected to the Syncing Master in order to automatically synchronize Outlook data.

To install the Outlook Add-in onto a computer, download and run the installer file of CodeTwo Public Folders. On running the installer the screen in **Fig. 1** will display. Click **Install Outlook Add-in**.

A standard installer program will start in which you are asked to approve the Licensing Agreement and provide the path to the folder on your drive where the program will install.

The installer of the Microsoft Outlook Add-in will ask you which Syncing Master you want to use to exchange data between Outlook Add-ins installed on other machines (**Fig. 3**).

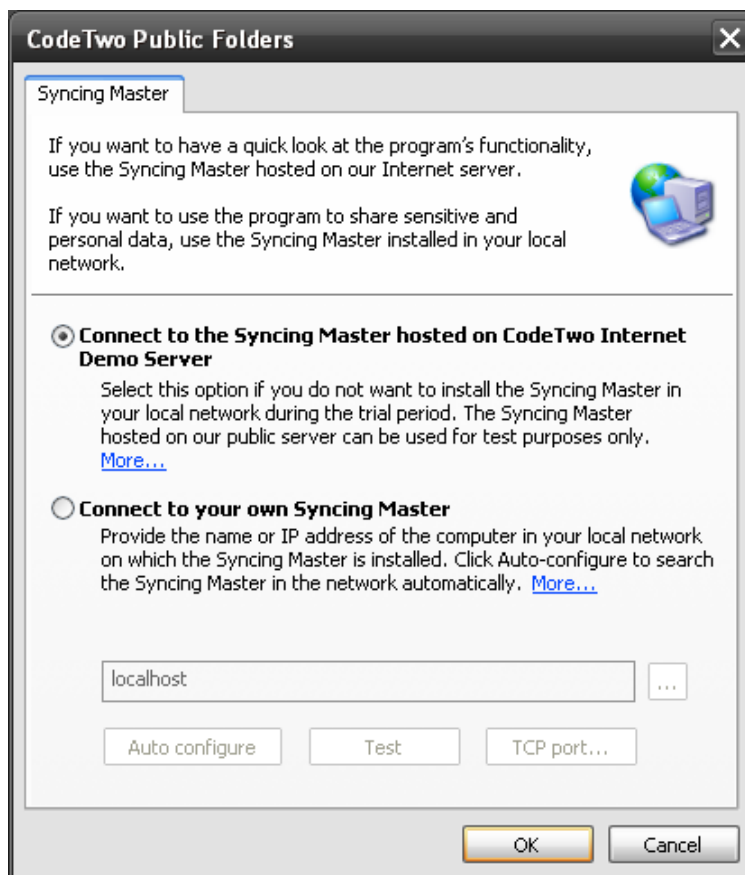


Fig. 3 The selection of the Syncing Master of CodeTwo Public Folders that will be used to share data between Microsoft Outlook Add-ins.

If you want to quickly test how Outlook data is shared with CodeTwo Public Folders, you do not need to install the Syncing Master in your network. Instead, select the option **Connect to the Syncing Master hosted on CodeTwo Internet Demo Server**. The Outlook- Add-ins will communicate with one another and synchronize data using [the Syncing Master on our Internet server](#). Remember that our Internet server can be used for test purposes only!

If you have installed the Syncing Master of CodeTwo Public Folders in your local network, check the option **Connect to your own Syncing Master** and provide the name (or IP address) of the computer hosting the Syncing Master in your local network. You can use the **Test** button in order to check if the connection to the Syncing Master is established correctly. If you would like to check your local network in search of the computer hosting the Syncing Master, click **Auto-configure**.

After approving the settings by clicking **OK**, the installation summary will appear (Fig. 4):

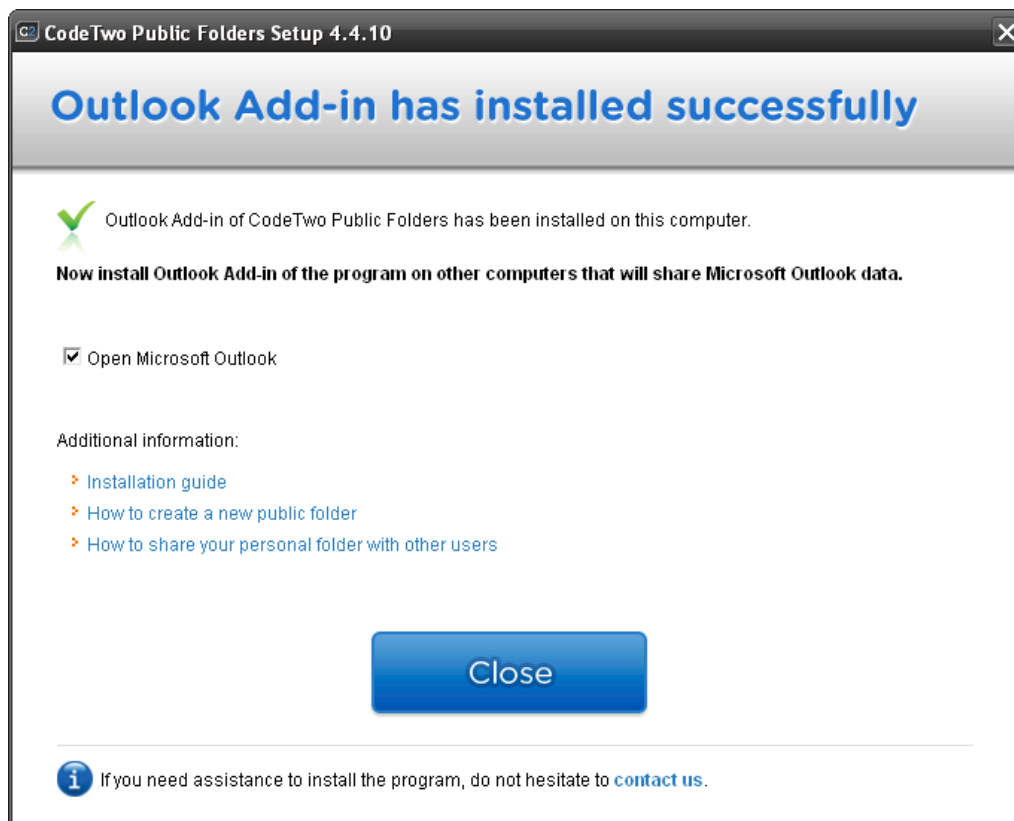


Fig. 4 Installation of the Outlook Add-in of CodeTwo Public Folders has completed.

After clicking **Close**, Microsoft Outlook will open, in which a tree of public folders C2PublicFolders will be added. You can now start creating new public folders and sharing data with other users in the network. But remember that in order to share data the other users' computers also need to be equipped with Outlook Add-ins of CodeTwo Public Folders.

If after installing the Outlook Add-in you cannot see public folders, read about [viewing and adding public folders](#).

2.2. Installation of Syncing Master

Requirements: Windows 7 / Vista / 2003 / XP / 2000

- ❗ To quickly test the program's functionality, you do not need to install the Syncing Master at all in your local network. Instead, connect to [the Syncing Master hosted on our Internet server](#). Remember though that it can be used for test purposes only.

If you are not installing the Syncing Master in your local network see the instruction for [installing Outlook Add-ins](#).

The installation of the Syncing Master in the local network is extremely easy and is completed in 3 clicks. The module itself does not need any configuration.

If you are installing the Syncing Master of CodeTwo Public Folders in the local network, remember that it must be installed on one machine in the local network only. The Outlook Add-ins of CodeTwo Public Folders installed on several computers connect to the Syncing Master and use this module to synchronize (in real time) changes in data in the shared folders of Outlook.

To install the Syncing Master, download and run the installer file of CodeTwo Public Folders. On running the installer the screen in Fig. 5 will display. Click **Install Syncing Master**.

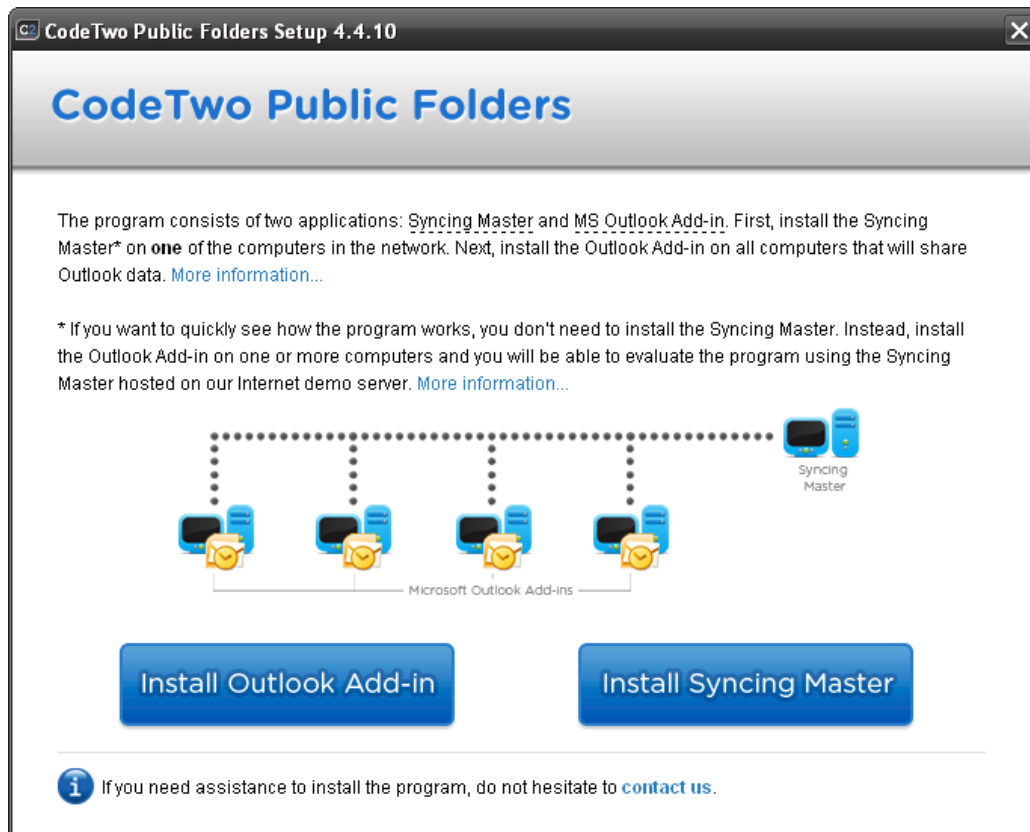


Fig. 5. The installer screen of CodeTwo Public Folders.

A standard installer program will start in which you are asked to approve the Licensing Agreement and provide the path to the folder on your drive where the Syncing Master will install.

And that's it. The Syncing Master has been installed and is ready to work.

Now install the Outlook Add-ins of CodeTwo Public Folders onto the computers in the network and you can start sharing Microsoft Outlook data in real time.

If you want to share data in Outlook on the computer that already hosts the Syncing Master, you need to install there the Outlook Add-in of CodeTwo Public Folders too.

2.3. Demo Syncing Master hosted on CodeTwo Internet Server

In CodeTwo Public Folders, the Syncing Master is responsible for synchronizing and exchanging data between the Outlook Add-ins. If you want to quickly learn how to share Outlook data with CodeTwo Public Folders, you do not need to install the Syncing Master in your network. Instead, you can use the Syncing Master that is specially hosted on one of our Internet server.

Remember that our Syncing Master is publicly accessible and can be used for test purposes only. Do not use it to share sensitive and confidential data as they will be visible for all users connected to the Syncing Master at that moment.



While installing Outlook Add-in you will be asked to point to the computer hosting the Syncing Master. If you want to use the Syncing Master hosted on our Internet test server, simple leave the option **Connect to the Syncing Master hosted on CodeTwo Internet Server** selected and click **OK**.

3. Upgrading to the latest version

While upgrading CodeTwo Public Folders to the latest version, remember to first upgrade the Syncing Master and then go on to upgrade all Outlook Add-ins installed in the network. If you fail to perform this operation, the data on some computers may not synchronize as the older (or newer) version of the add-in will not be able to connect to a newer (or older) version of the Syncing Master.

Upgrading CodeTwo Public Folders on a selected computer is very simple. Just [download the latest version of the installer](#) from our website and run it. The whole upgrade procedure will proceed automatically and requires no further steps.

If you are already using the [full, activated version of the program](#), do not worry - after upgrading the program will stay activated and you will not need to reactivate it. All data and settings in the program will be kept too.

On running the installer file on the computer that already hosts an older version of CodeTwo Public Folders the following screen will display (Fig. 6):

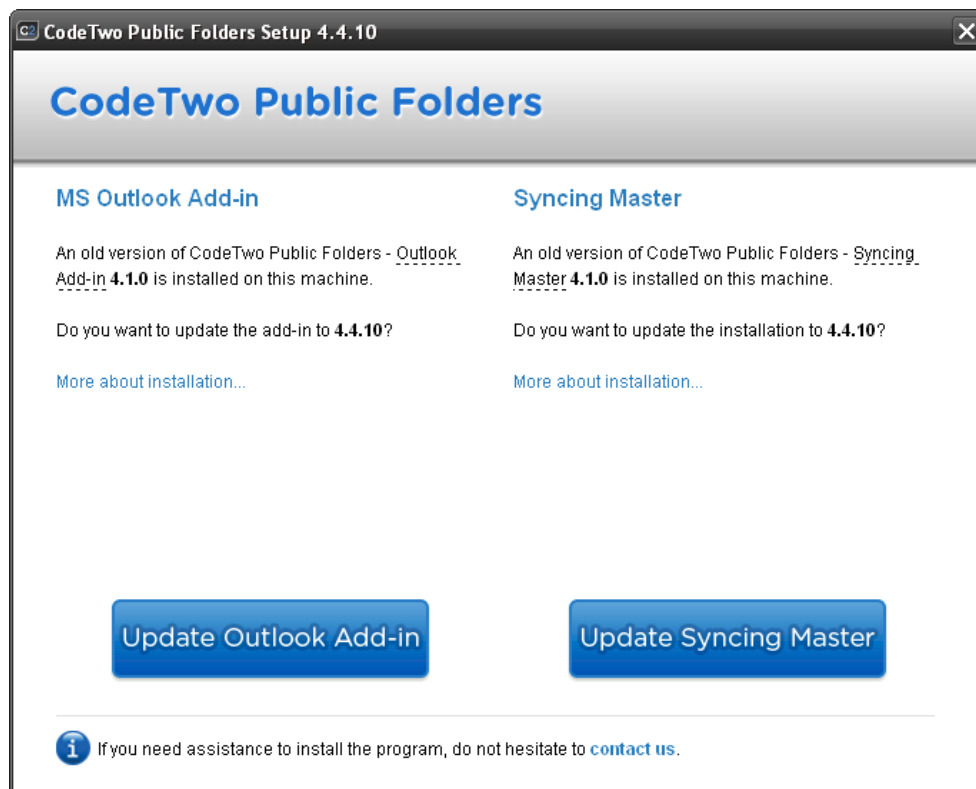


Fig.6. Upgrade screen of CodeTwo Public Folders.

To upgrade the Syncing Master, click **Upgrade Syncing Master** button. If you want to upgrade the Outlook Add-in, click **Upgrade Outlook Add-in** button.

And that's it. The program will update on this computer.

Remember that upgrading the program to a newer version that has a different initial number may be payable, for example an upgrade from 3.x to 4.x. Point upgrades (within the same version number e.g. from 4.0 to 4.5) are free of charge. The current information on upgrading and pricing can be found in the [pricing section for this application](#).

4. Program Settings

CodeTwo Public Folders consists of two modules: the Syncing Master and the Outlook Add-in. The Syncing Master handles communication and data synchronization between the Outlook Add-ins and it should be installed on one of the computers in the local network. The Outlook Add-ins should be installed on the computers in the local network that will be used for public folders in Microsoft Outlook. If you want to use public folders in Outlook on a computer hosting CodeTwo Public Folders Syncing Master, you also need to install the Outlook Add-in of the program on that computer. [Read installation walkthrough.](#)

4.1. Syncing Master settings

To change the Syncing Master settings, click **Start**, choose **Programs | CodeTwo | Public Folders Syncing Master** from the menu and select **Configuration**.

The configuration of the Syncing Master consists of two steps. The first one is to configure the TCP port, used to communicate between the Outlook Add-ins and the Syncing Master (Fig.7). The default port number is 5002. We recommend you to keep the default setting unless there is a need to change it. If you change the port number, you must remember to change it in all the Outlook Add-ins in the network:

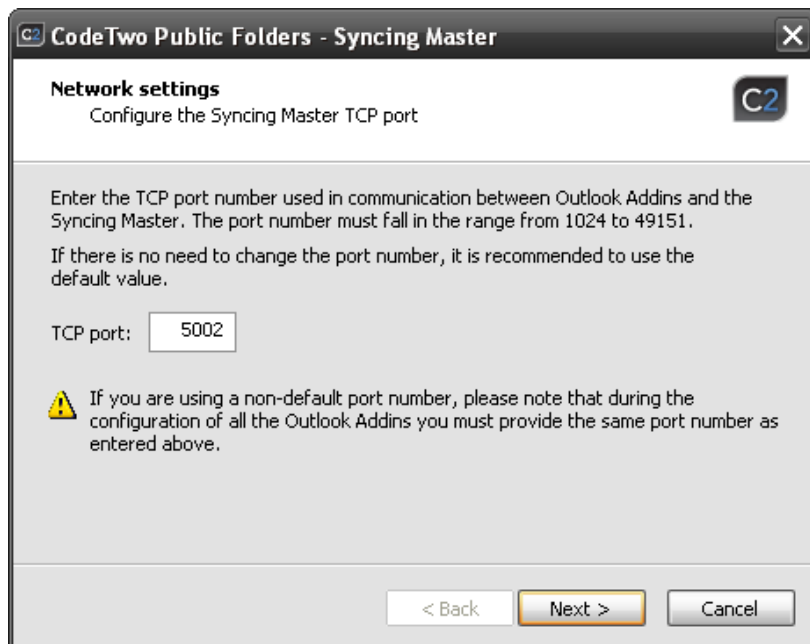


Fig.7 Syncing Master settings - the TCP port configuration.

Once you have confirmed the selection and clicked the **Next** button, you will see the dialog box in which you select the logging level of the log files (Fig.8). This should be set to **Standard** unless there are problems in communication between the Outlook Addins and the Syncing Master. The **Detailed** settings will help to diagnose the problem more easily.

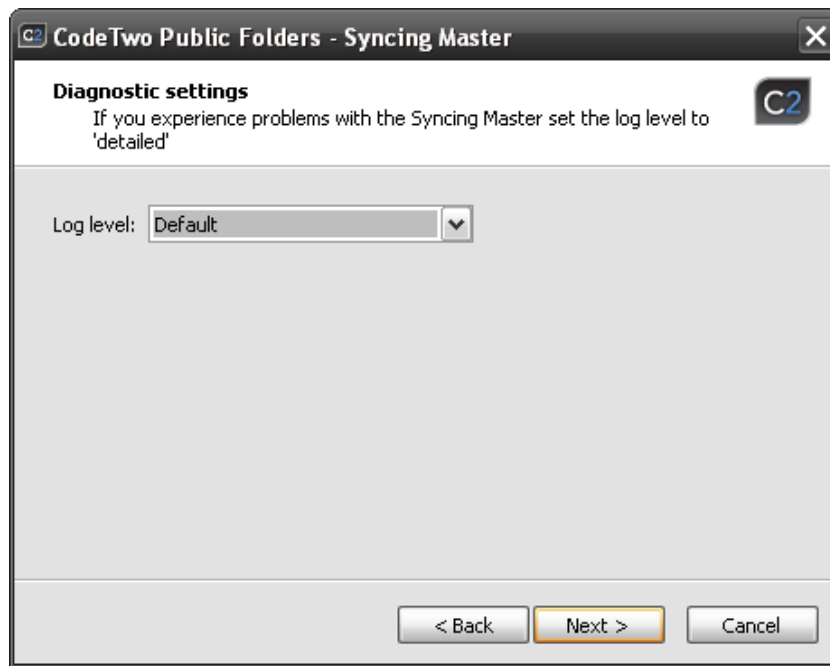


Fig.8 Syncing Master settings - the log level configuration.

4.1.1. C2PublicFolders System Service Configuration

The Syncing Master is developed as a system service. If the Outlook Add-ins have difficulties connecting to the Syncing Master, you must check the C2PublicFolders system service configuration using the **Services** console in the **Administrative Tools** program group.

If the Outlook Add-ins cannot connect to the Syncing Master, check whether the C2PublicFolders system service is started. In order to do that, open the **Services** console and make sure that the C2PublicFolders service is started. If it isn't, click the right mouse button on the service and select **Start** from the popup menu. If the service cannot be started and the login error message is displayed, click the right mouse button on the service, choose **Properties** from the popup menu, go to **Log On** and check if the **Local System account** option is selected.

If the C2PublicFolders service does not start at the computer start up, make sure that **Startup Type** for the C2PublicFolders service is set to **Automatic** (Fig.9). Click the right mouse button on the service, select **Properties**, and on the **General** tab set the start up type to **Automatic**.

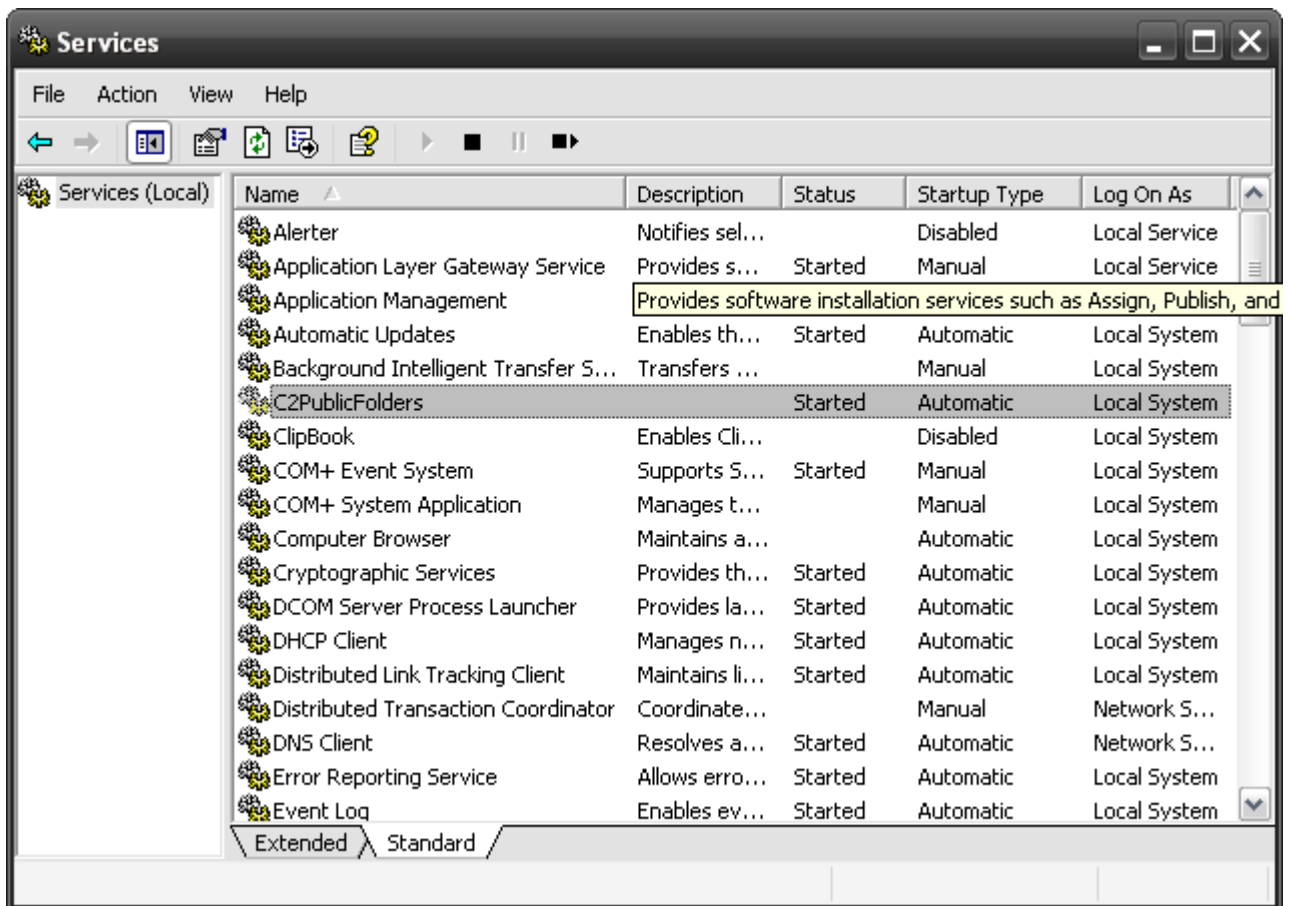


Fig.9 C2Public Folders system service configuration (Syncing Master)

4.2. Outlook Add-in settings

If you want to check or change the current Outlook Add-in settings, choose **Public Folders | Options** from the Outlook menu and the settings dialog box will be displayed.

4.2.1. Syncing Master tab

The **Syncing Master** tab (Fig.10) informs you whether what you are using is the demo or your own Syncing Master. If **Connect to the Syncing Master hosted on CodeTwo Internet Demo Server** option is checked, your Outlook will display the public folders and their contents from our internet demo server. Please note that the demo server should be used for testing purposes only, as the data will be visible to everyone over the internet.

If you have already installed the Syncing Master of CodeTwo Public Folders, check the **Connect to your Syncing Master** option, provide its name (or IP) and you will be able to use it on a day-to-day basis and keep important and confidential data. To find the computer in the network, you can also use the **Browse** button. If you have set a non-default TCP port number on the Syncing Master, click the **TCP port** button to provide its new number.

To check the connection with the Syncing Master, use the **Test** button.

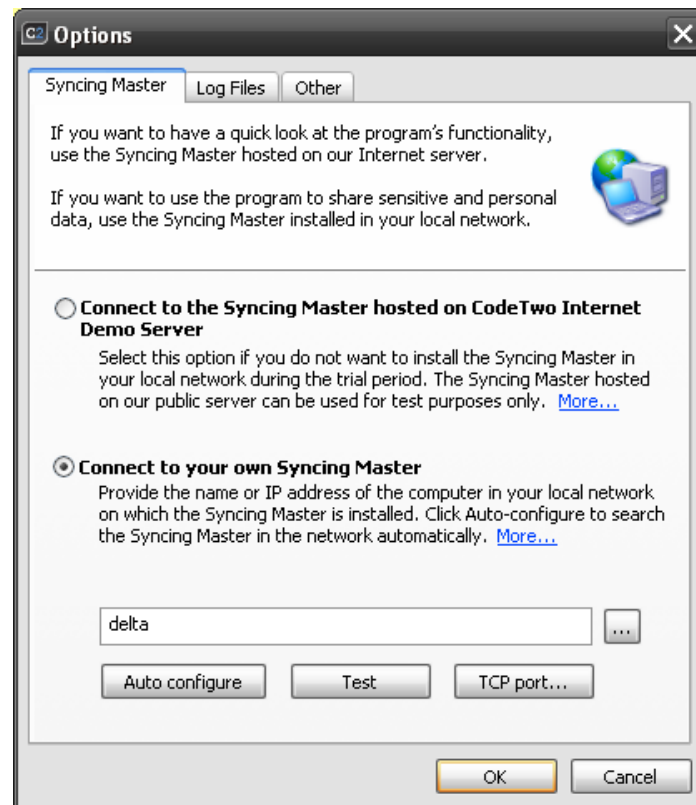


Fig.10 Outlook Add-in settings – the Syncing Master tab

4.2.2. Log Files Tab

The **Log files** tab (Fig.11) includes the **Location** field. It shows the path to the log files (text files containing some diagnostic information). The **Logging level** should be set to **Standard**. It should be set to **Detailed** only if data synchronization errors occur. Click **Send** to send the logging files to technical support.

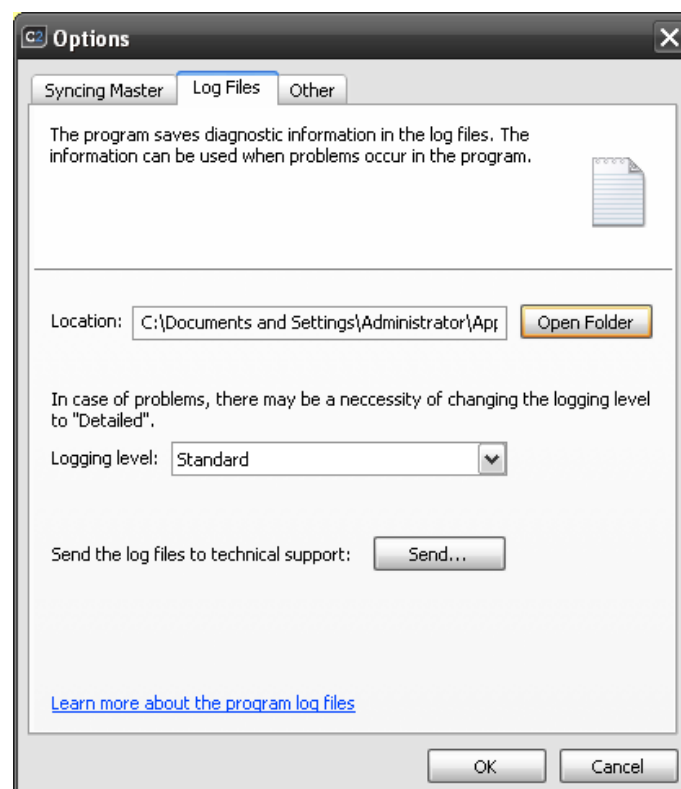


Fig.11 Outlook Add-in settings - the Log files tab.

4.3.2. Other Tab

In the **Other** tab (Fig.12) the **Automatically display the synchronization window** option lets you decide whether the data synchronization status dialog should be displayed while synchronizing data in the shared folders. The window is automatically shown during the initial synchronization when you're running Outlook for the first time after the installation of CodeTwo Public Folders.

Synchronize read / unread status of messages makes the Syncing Master synchronize information whether a message has been read by any user in public folders.

By selecting the **Compress data prior to sending to the Syncing Master** option you decide whether the data sent from the Outlook Add-in to the Syncing Master undergoes compression. Compression will improve the speed of synchronization between the Outlook Add-in and the Syncing Master.

The **Local data file** field shows the path to the PST file, where the local copy of the shared folders data is stored. The advantage of a local copy is that the program will synchronize only the data, changed while the Outlook Add-in was not connected to the Syncing Master. This makes synchronization much faster and more effective. The local copy makes it possible to work in the offline mode when there's no connection to the Syncing Master.

The **Logged user** field shows the username of the currently logged-in Windows user. That name is used by the administration application of CodeTwo Public Folders to manage access rights for users to the public folders and shared personal folders.

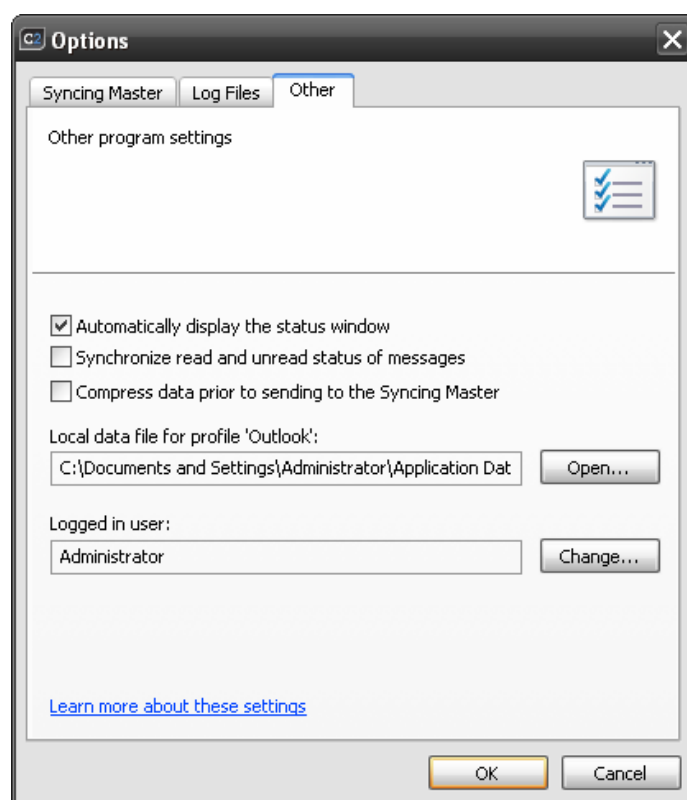


Fig.12 Outlook Add-in settings - Other tab.

4.4. Adding Public Folders to the Outlook Profile

Once the CodeTwo Public Folders Outlook Add-in is installed, the default Outlook profile of the user displays a new C2PublicFolders tree, in which users can create public folders (Fig.13). To display the C2PublicFolders list, click **Show All Public Folders** on the CodeTwo Public Folders toolbar. Alternatively, to display the list of folders in Outlook 2000/XP, choose **View | Folder List** from the main menu. In Outlook 2003 choose **Go | Folder List** or press Ctrl+6:

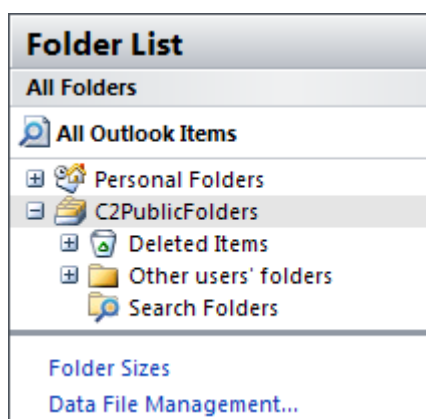


Fig.13 Public Folders on the Folder List in Outlook

When the software is installed, start Microsoft Outlook using another profile; the software will display the dialog box asking you whether you want to add public folders to that profile (Fig.14):

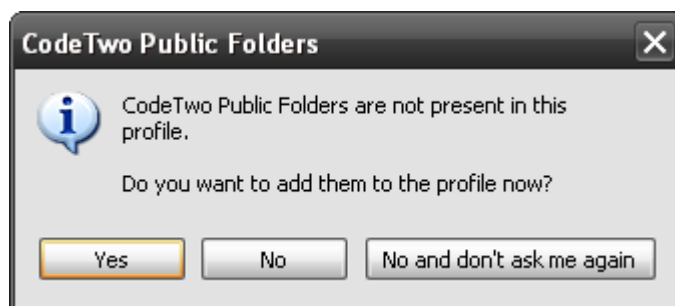


Fig.14 A dialog box asking you whether you want to add public folders to a non-default profile

If you click **No and don't ask me again**, the public folders will not be added to the profile and the dialog box won't pop-up anymore. If you want to add public folders to the profile later, follow the tips below:

Outlook 98/2000

1. Start Outlook using the profile in which you wish to add public folders.
2. Choose **Tools | Services** from the Outlook main menu.
3. In the **Services** dialog box click **Add**.
4. In the **Adding a service to the profile** dialog box select the **C2PublicFolders** service and click **OK**.
5. The above-described configuration dialog box of the CodeTwo Public Folders will display. If the name of the computer hosting the Syncing Master is correct, click **OK**.
6. Click **OK** to close the **Services** dialog box.

Outlook XP/2003/2007

1. Start Outlook using the profile in which you wish to add public folders.
2. In the Outlook main menu choose **File | New | Outlook Data File**.
or

- In the Outlook main menu choose **Tools | Options | Mail Setup**, click **Data Files** and then **Add**.
3. In the **Outlook Data Files** dialog box select the **C2PublicFolders** service and click **OK**.
 4. The above-described configuration dialog box of the CodeTwo Public Folders will appear. If the name of the computer hosting the Syncing Master is correct, click **OK**.
 5. Click **Close** and then **OK**.

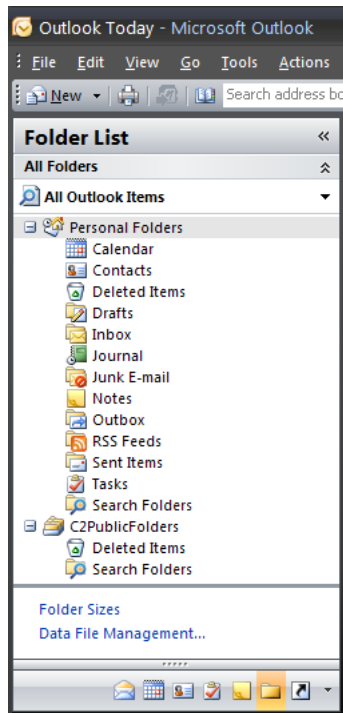
4.5. Removing Public Folders From the Outlook Profile

If you want to remove public folders from the current Outlook profile, click the right mouse button on the **C2PublicFolders** folder and select **Close the folder: C2PublicFolders** command from the popup menu.

5. Sharing Folders

5.1. Sharing Public Folders

CodeTwo Public Folders is the software allowing you to share your Outlook data in two ways: by using the public folders (described in this section) or by [sharing your personal folders](#) (see page 19).

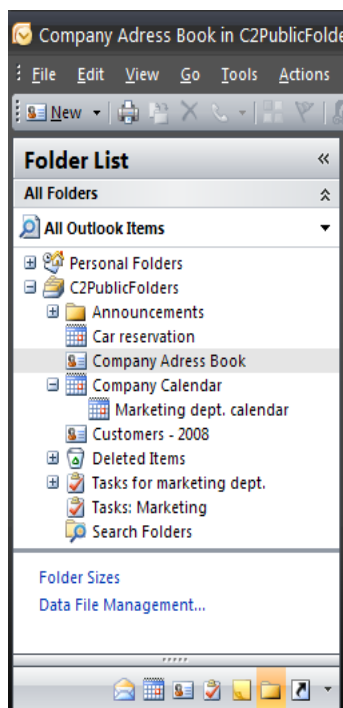


Public folders can be found in a separate branch called C2PublicFolders. It appears in Outlook on your folder list once the software is installed - at first it's empty and contains only two standard folders called: "Deleted items" and "Search folders" (if using Outlook 2003/2007)(**Fig.15**). If you are using our internet demo server, you will see the folders and some test data in these folders, put there by other users who are evaluating the software over the Internet.

The tree of public folders is completely separated from the personal folders tree. Public folders are for storing the resources of many users, e.g. calendars, contacts, emails, group tasks, etc. If you want to share the data from your personal folders, use the [sharing of personal folders](#) feature (see page 19).

- ❗ If you can't see the public folders after installation, make sure the **Folder List** view on the left panel is on.

Fig.15 After installing the software the public folder tree is empty



Users can create new folders of any type, available in Outlook: contacts, calendars, mail, tasks, journal, notes and share data in these folders (**Fig.16**). The data, created in the public folders are shared with all CodeTwo Public Folders users on the local network. All changes are synchronized in real time and are immediately visible to everyone.

The Administrator can manage access rights to the public folders. This feature allows some users to have full rights to some of the resources, while the others will only have partial rights, e.g. read objects. Other users, for example, may be denied all access rights and not see some of the public folders. More information can be found in the [access rights management](#) chapter (see page 26).

Fig.16 Examples of some public folders created by other users

5.2. Sharing Personal Folders

The publishing (sharing) of personal folders feature allows users to share their Outlook data with the people they work with on a day-to-day basis.

Nothing will change for you and you will have the same convenience working in Outlook as before. You don't have to change your habits and you can still work with your calendar, tasks, mail and contact list just as you did earlier. You can still use the reminders or synchronize data with portable devices like mobile phones or PDA. However, completely new capabilities arise now for you and your co-workers. When you have started sharing the selected folders, other users can create new appointments, deadlines and tasks directly in your personal folders. They will be able to view and add contacts to your contact base and will have access to your inbox and sent items folders.

Tony shares his personal contacts

Sil can open Tony's personal contacts

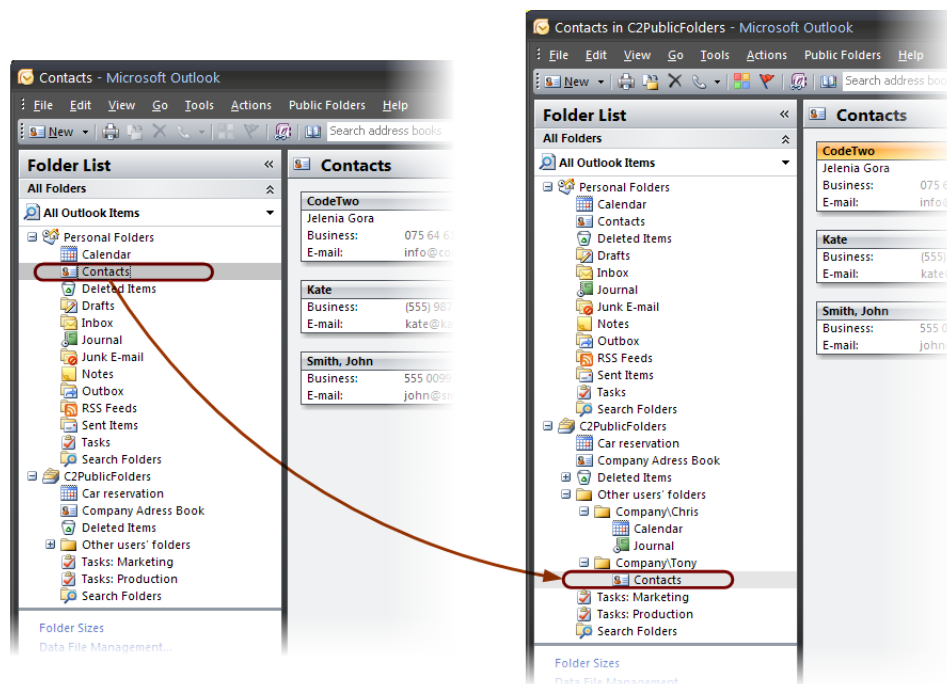


Fig.17 Users can share their personal folders with co-workers (Click to enlarge the image).

While you are still working on data in your personal folders, other users will see the folders you share in the public folder called **Other users' folders**. In this folder each user sharing his/her personal folders is given a separate branch containing all his/her shared folders (Fig.17.).

Since by publishing your private data, you share it over the network, the management of access rights (see page 22) is of utmost importance. By default, when you start sharing your data, everyone in your network will only have the read access rights, but as the owner you can change those rights in any way you want.

The objects in the shared folders marked as **Private** will always remain invisible to other users. This way, even though you are sharing your personal folder, you can still restrict access to some personal data to all users.

5.2.1. Sharing Your Personal Folder with Other Users

There are two ways in which you can share a personal folder with other users.

Method #1

To share a selected personal folder to other users, click on it with the right mouse button and select from the context menu "Share this folder..." (Fig. 19).

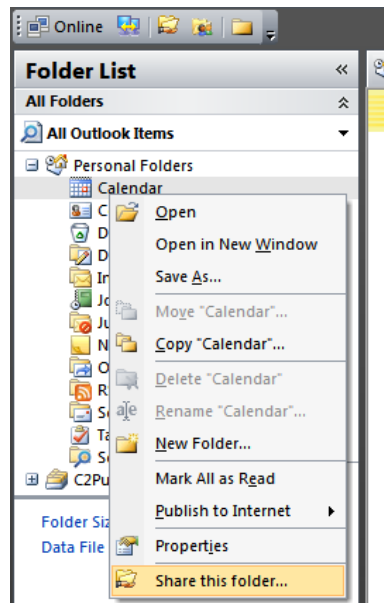


Fig.19 Sharing a personal folder in the context menu.

After you select the folder to share, a dialog box containing a list in which access rights can be defined (Fig. 20). Give appropriate rights to users and click OK. By default all users have the right to read the folder - they cannot make any changes. [More about managing access rights...](#)

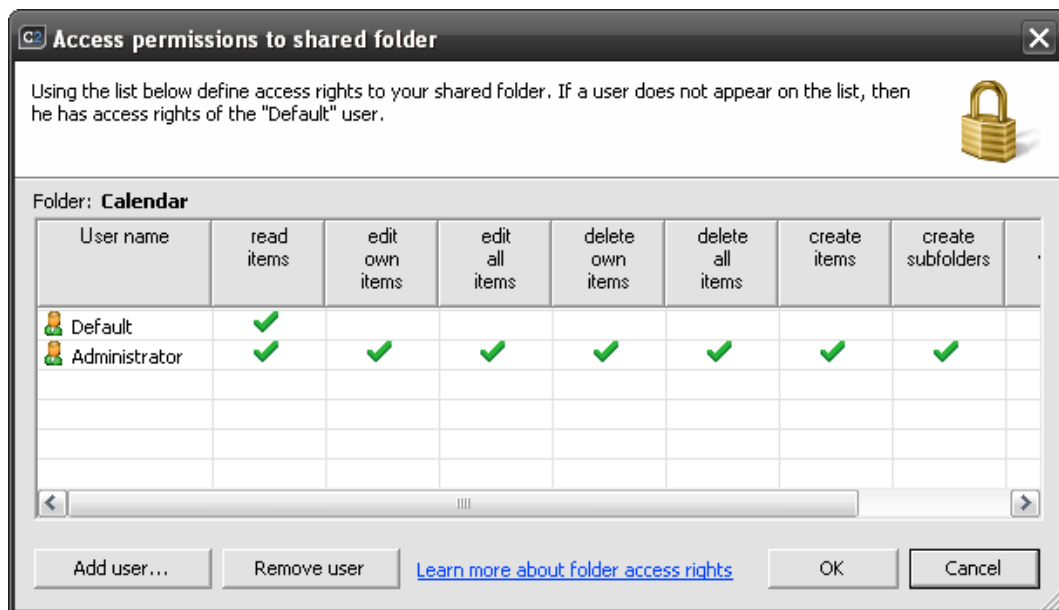


Fig.20 Administration panel in which access rights to a folder are set for users.

Method #2

From the Outlook menu, select **Public Folders | My shared folders** from the Outlook menu or click **My Shared Folders** on the CodeTwo Public Folders toolbar. A dialog with a list of personal folders currently shared by you will appear (Fig.21). If you are sharing it for the first time, the list will be empty. (If you don't want to share a personal folder anymore, select it on the list and click the **Stop sharing** button.)

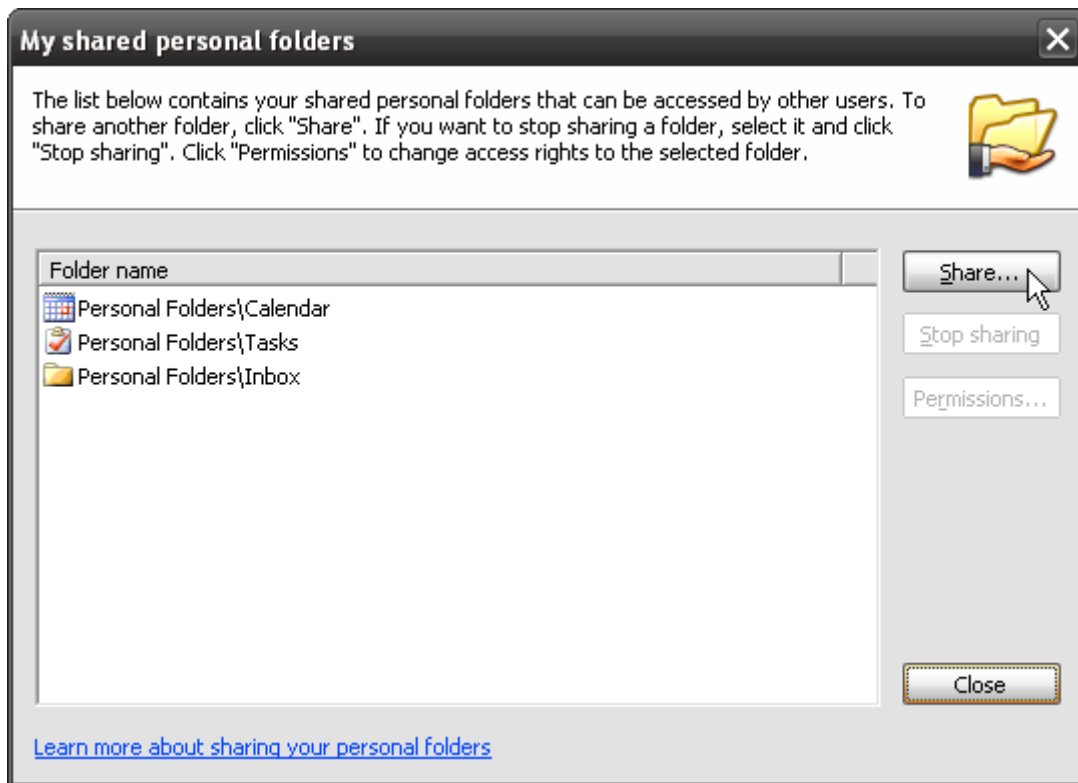


Fig.21 The dialog box with a list of shared personal folders.

Click the **Share** button and choose a folder you want to share from the personal folders tree (Fig.22).

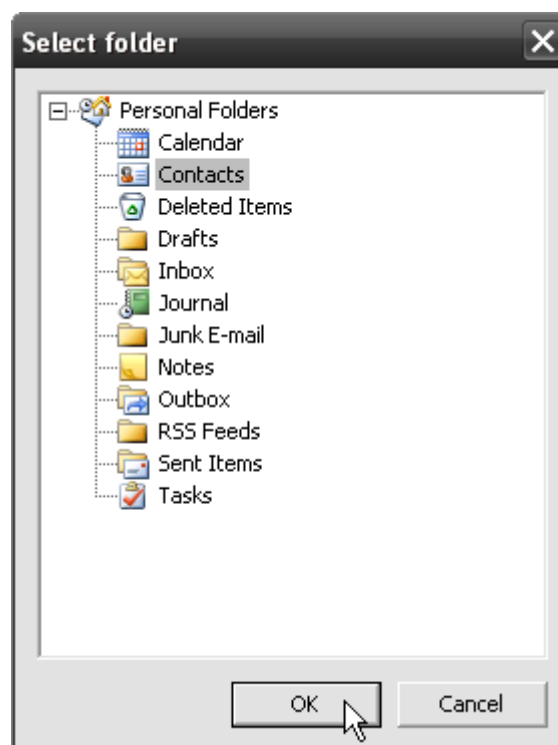


Fig.22 Selecting a personal folder to share.

Confirm your selection by clicking **OK** and a box for access rights management of a shared folder will display (Fig.23). By default, each user has only the read access rights to your data. To define the rights for a new user, click the **Add user** button, enter the user's name (this will be a username you have used to log in to Windows) and click **OK**. The user will be added to the list. By checking or unchecking the appropriate rights you can now define what actions the user will be allowed to take upon the folder.

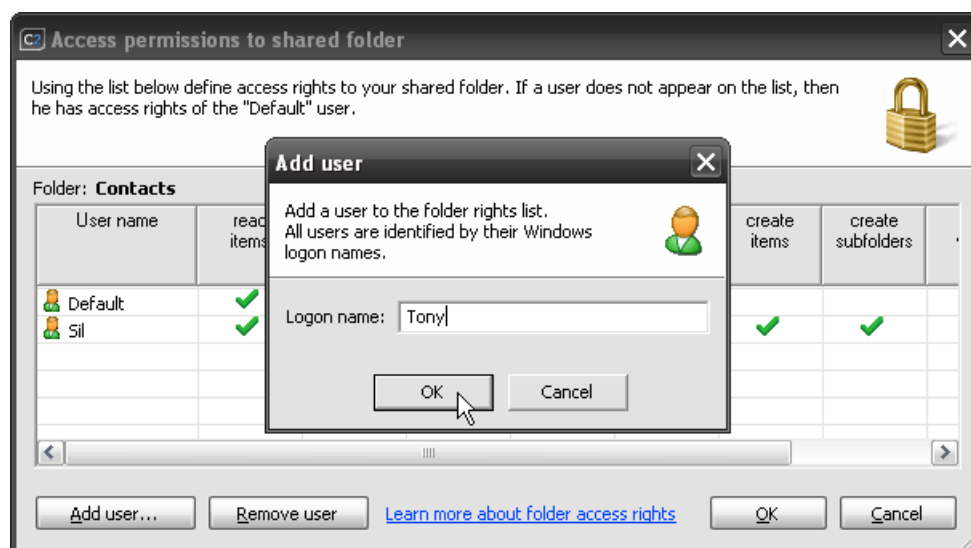


Fig.23 Defining user access rights for a folder.

There's a user called **Default** on the user list. The rights assigned to that user are the default access rights to the folder for every user that is not added to the list.

If you want to remove a user from the list, select that user and click the **Remove user** button. The user will be removed from the list and from now on will have the default access rights to that folder. Click **OK** to save the changes.

5.2.2. Managing Access Rights to Personal Folders

The table below describes the rights that can be granted to a user regarding a given folder:

The access rights name	Description
Read Items	User can read objects in the folder. If the user doesn't have this rights, he/she will see an empty folder.
Edit own items	User can only edit the objects that have been created by himself/herself.
Edit all items	User can edit all objects in the folder.
Delete own items	User can only delete the objects that have been created by himself/herself.
Delete all items	User can delete all objects in the folder. This right does not allow users to delete folders. In order to delete a folder, the "Folder owner" right is required.
Create items	User can create new objects in the folder.
Create subfolders	This right has no effect, because other users can't create subfolders in your shared personal folders.
Folder visible	User can see the folder. If the user does not have this privilege, he/she can neither see the folder, nor any of its subfolders.
Folder owner	Only the user who enjoys this right is allowed to delete a folder, change its name and define access rights to the folder for other users. The folder can have more than one owner, but among them there always has to be a user, who shares it.

Tab. 1 Description of access rights management

Most access rights are independent from each other. For example, a user can have the "Create items" right, but not the "Read items" right. In this particular example, after creating an object, it will be visible for the time of the session and will disappear after restarting Outlook.

The interdependent access rights are the "Edit own items", "Edit all items", "Delete own items" and "Delete all items" rights. A user can't have the "Edit all items" right without having the "Edit own items" right simultaneously. The same applies to the deletion of objects.

- ❗ The objects in the shared folders marked as **Private** will always remain invisible to other users independently from the rights they have. This way, even though you share your personal folders, you can still keep your personal data and nobody will have access to those resources.

5.2.3. Opening the Shared Personal Folders of Other Users

To open a shared personal folder of another user, choose **Public Folders | Other users' shared folders** option from the Outlook menu or click **Other users' shared folders** in the CodeTwo Public Folders toolbar. A dialog box containing a list of already opened shared folders will display (Fig.24). If you haven't opened any folder yet, the list will be empty.

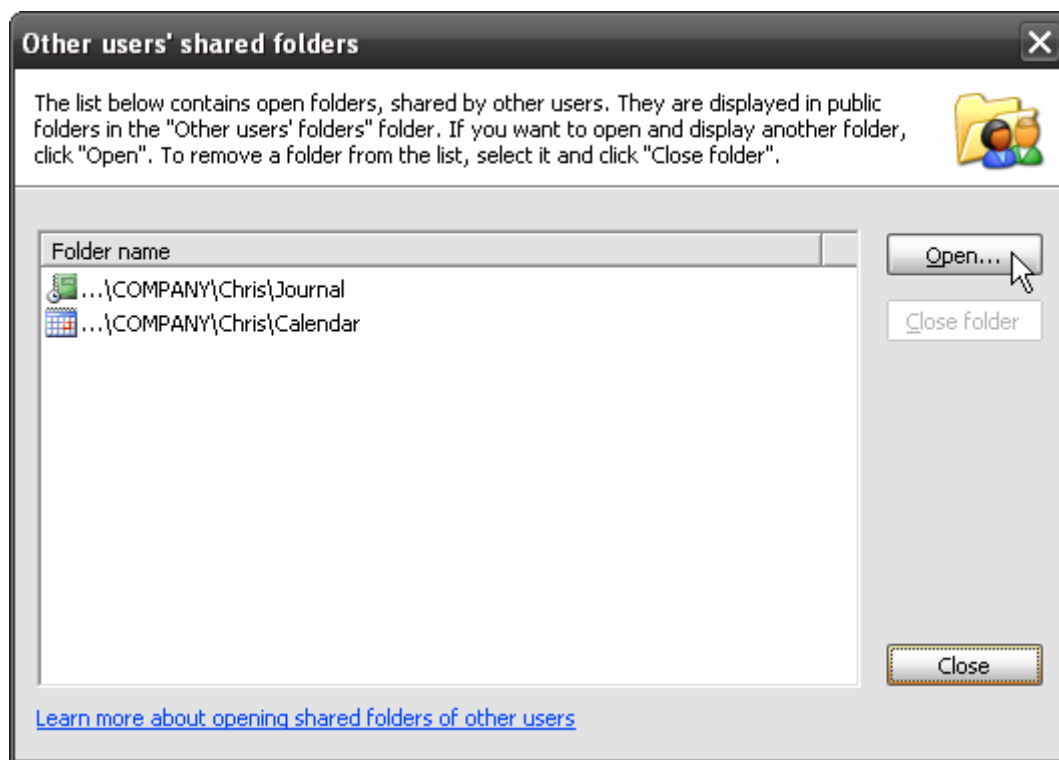


Fig.24 The list of opened folders of the other users.

If you wish to open another shared folder, click the **Open folder** button. A list of all users sharing folders and the folders accessible to you will display (Fig.25).

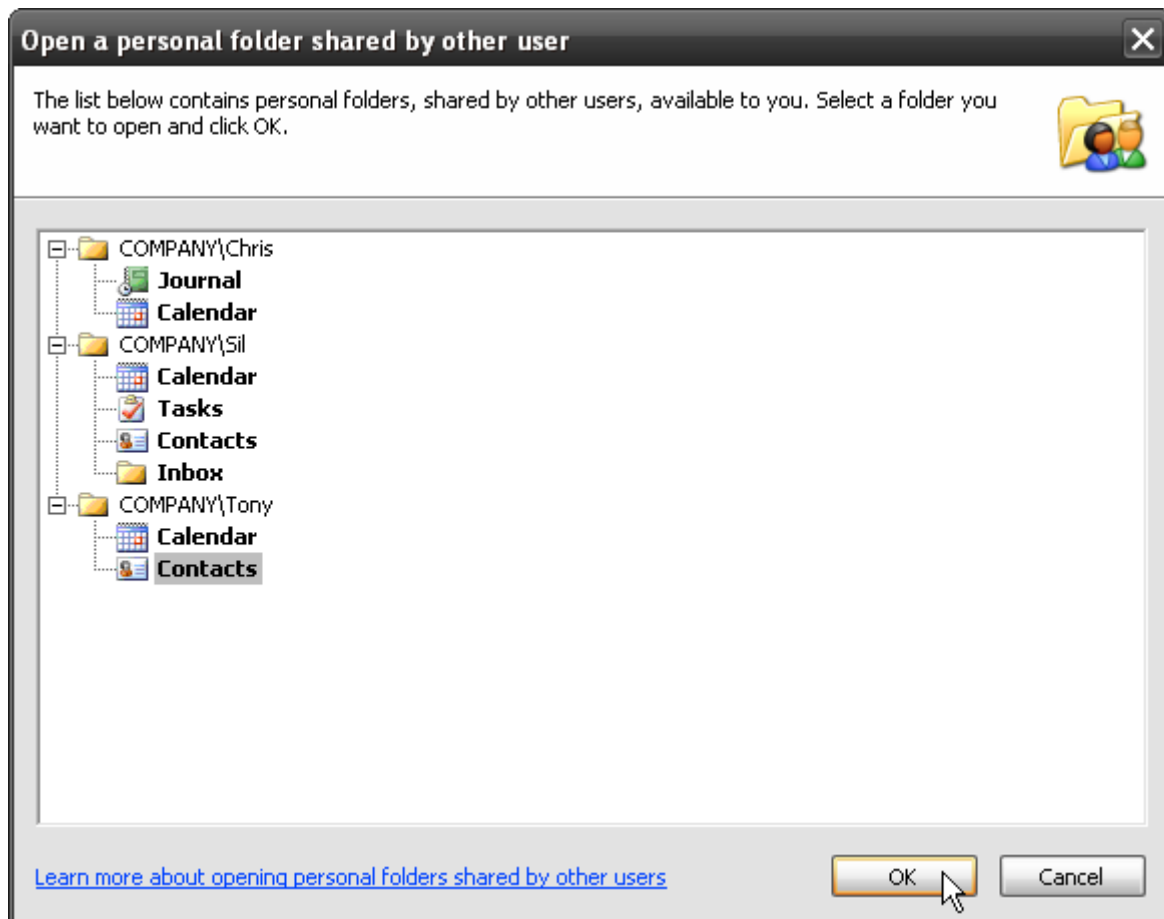


Fig.25 The list of all shared folders that can be opened.

Users sharing folders are identified by the domain or computer name (if there's no domain) and their Windows login name.

Choose the folder you want to open (Fig.25) and click OK. A dialog box with the folder name will display (Fig.26), which you may choose to change (the folder will be displayed under this name in your folder list). Click OK

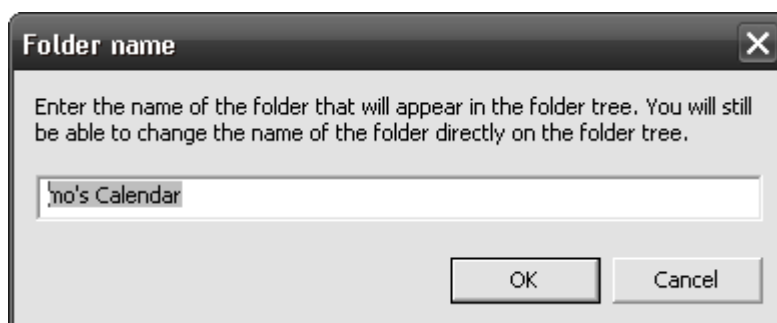


Fig.26 You can change the name by which the folder will be displayed.

The folder will appear on the list of opened folders (Fig.24) and in the **C2PublicFolders** branch in the **Other users' folders** (Fig.27) folder. You can go to that folder and see its contents. The actions you can take depend on the access rights that are granted to you by its owner.

- ⚠ After opening a personal folder of another user, it appears in a corresponding branch of the C2PublicFolders tree (Fig.27); it does not appear in your personal folders.

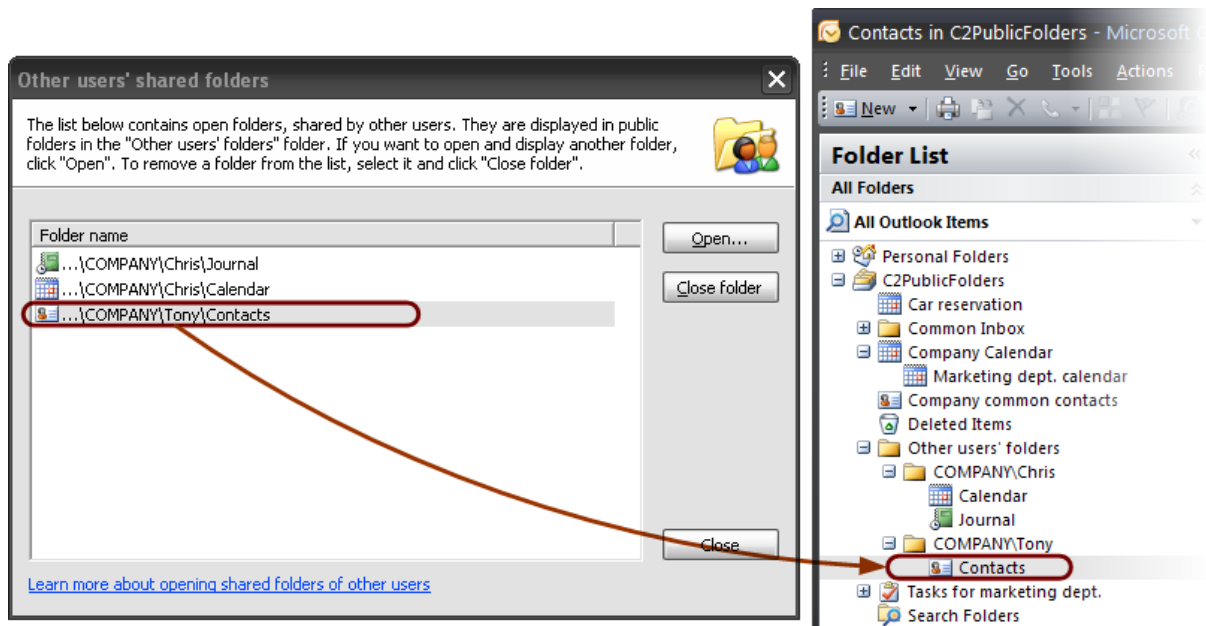


Fig.27 Shared personal folders of other users are displayed in the C2PublicFolders branch and not in your personal folders.

If you want to close the shared folder of another user, remove it from the C2PublicFolders tree or select it on the opened folders list (Fig.27) and click the **Close folder** button.

6. Access Rights Management

The Administrator can define user access rights to the data in the public folders and to the shared personal folders. Granting rights is done in the **Administration** program, installed with the Syncing Master. In order to start the program, click **Start** menu and select **Programs | CodeTwo | CodeTwo PublicFolders Syncing Master | Administration**.

The access rights to the shared personal folders can also be managed directly in Outlook by their owners. More can be found in [personal folder section](#) (see page 19).

The program consists of two panes (**Fig.28**). In the left pane, called folder list, the entire public and shared personal folder structure is displayed. The right pane, called the user list, shows access rights for all users to the currently selected folder. Access rights displayed in the user list always apply to only one, currently marked folder from the folder list.

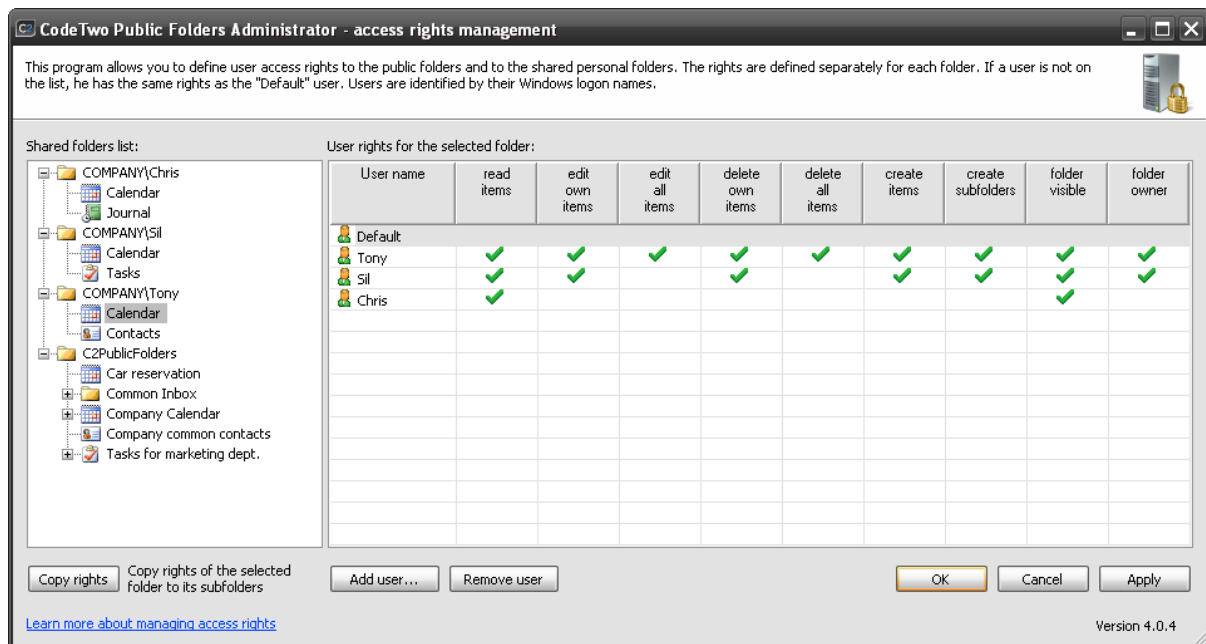


Fig. 28 Administration application for public folders and shared personal folders access rights management.

On the folder list there are public folders and all currently user-shared personal folders. All public folders are in the C2PublicFolders tree. In the other trees there are personal folders - displayed in a separate tree for each user. Each tree's name consists of the domain or a computer (if there is no domain in the network) and the Windows login name (username used to log in to Windows). For instance, the first user on **picture 23** is named COMAPNYChris, which means he is from the COMPANY domain (or computer) and his account name is Chris. This user is sharing 2 folders: Calendar and Journal.

The Administrator can't start sharing a personal folder of a user (or stop sharing it). This can be done only by the owner of the personal folder via Outlook ([read how to do it](#) – see page 19). The Administrator can only change access rights to that folder.

Initially, after installing CodeTwo Public Folders, all users have full access rights for all public folders. Therefore, they can create, edit and delete all items and folders. If you want to restrict rights for some users, you need to add them to the list in the right pane and define the appropriate access rights for them. User ID's in CodeTwo Public Folders are based on the Windows logon usernames used to log in to the system.

In order to define user rights, add the user to the user list by clicking the **Add user** button. A dialog box with a text field will appear, where you can enter the username (it is a Windows logon name). After typing the

username and clicking **OK**, the user will be added to the user list. Next, define the tasks, which the user can perform on the items in the selected folder by checking or unchecking the appropriate rights beside the username.

There is a user called **Default** on the user list for each folder. The rights assigned to that user define the default level of access rights for to the currently selected public folder. Every user who is not added to the list of rights of the given folder has default access rights (like the **Default** user for that folder).

In order to delete a user from the list, select the user and click the **Remove user** button. The user will be deleted from the list and from now on he/she will have the default access rights for the selected folder.

The **Copy rights** button located under the list of folders allows quick copying of rights from currently selected folder to all of its subfolders. For example, if you want the same access rights to take effect in all of the public folders, define the rights for the root folder (C2PublicFolders), and then click **Copy rights**. They will be copied to all public folders.

The changes made in the **Administration** program will not be saved until you click the **Save and Close** button.

The table below describes the possible rights for the folder that can be granted to a user:

The access rights name	Description
Read Items	User can read objects in the folder. If the user doesn't have this rights, he/she will see an empty folder.
Edit own items	User can only edit the objects that have been created by himself/herself.
Edit all items	User can edit all objects in the folder.
Delete own items	User can only delete the objects that have been created by himself/herself.
Delete all items	User can delete all objects in the folder. This right does not allow users to delete folders. In order to delete a folder, the "Folder owner" right is required.
Create items	User can create new objects in the folder.
Create subfolders	User can create new subfolders in a folder - concerns public folders only. This right has no effect for shared personal folders, as the subscribing users never can create any subfolders in those folders (only the owner of the shared personal folders can create subfolders).
Folder visible	User can see the folder. If the user does not have this privilege, he/she can see neither the folder, nor any of its subfolders.
Folder owner	Only the users with that privilege can delete a folder, change its name and define access right to the folder for other users. Each folder must have at least one owner. The personal folder is always owned by at least one user that started sharing it.

Tab.2 Access rights management – description

It has to be noted that most of the rights are independent from each other. A user may, for example, have the right to **Create items**, but not to **Read items**. However, in this specific case, after creating an element by the user, it will remain visible for the time of the given session, and will disappear after restarting Outlook.

Edit own items and **Edit all items**, as well as **Delete own items** and **Delete all items** are interdependent rights - which is the result of their logics. A user may not be granted the right to **Edit all items** and at the same time be denied the right to **Edit own items**; the same rule applies to the rights for deleting items.

7. Offline Mode

CodeTwo Public Folders lets you work on data in the shared folders even when a computer is not connected to the network (offline mode). All changes in that case will be saved locally and synchronized with the data on the Syncing Master once the connection is re-established. The ability to work in the offline mode is especially helpful to users who are often outside the office and use portable computers and devices.

The CodeTwo Public Folders toolbar includes **Online Mode / Offline Mode** icon informing whether the Outlook Add-in is connected to the Syncing Master or it is Offline (Fig.29).



Fig. 29 CodeTwo Public Folders toolbar (in Online and Offline Mode).

When the client goes offline, the status window informing in red text about that event, is displayed. The text **Offline mode (disconnected)** displays (Fig.30). The window automatically disappears after 3 seconds.

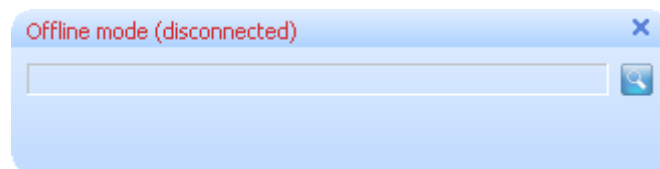


Fig. 30 Outlook Add-in displays information about working in the offline mode.

If, during work, the Outlook Add-in re-establishes the connection, it will display the blue text, saying **Online mode (connected)** (Fig.31). The window will also automatically disappear after 3 seconds.

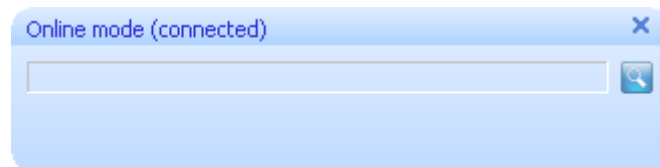


Fig. 31 Outlook Add-in displays information about being connected to the Syncing Master.

When the Outlook Add-in gets connected to the Syncing Master, whether after re-establishing connection or while starting up Outlook, it commences synchronization of the data changed while working offline or changed on the Syncing Master while the Outlook Add-in has been disconnected. The synchronization process can be viewed in the synchronization window, which will be displayed at the bottom right corner of the screen (Fig.32) - the information about data currently being synchronized between the Outlook Add-in and the Syncing Master will be displayed there.

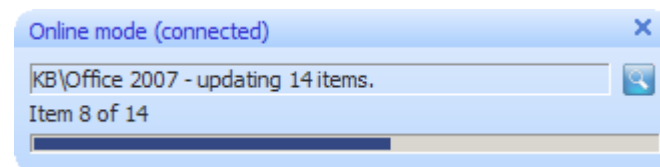


Fig. 32 Synchronization status window displays information about the progress of the synchronization process.

The synchronization status window will be displayed or not, depending on the selected option in the settings. To enable or disable it, go to the **Public Folders, Options** menu, choose the **Other** tab and check or uncheck the **Automatically display the synchronization window** option (Fig.33). If unchecked, the synchronization window will neither display while opening Outlook, nor during work. The only exception is the situation, when the Outlook Add-in loses or regains connection to the Syncing Master - the status window is then always displayed, independently from the selection.

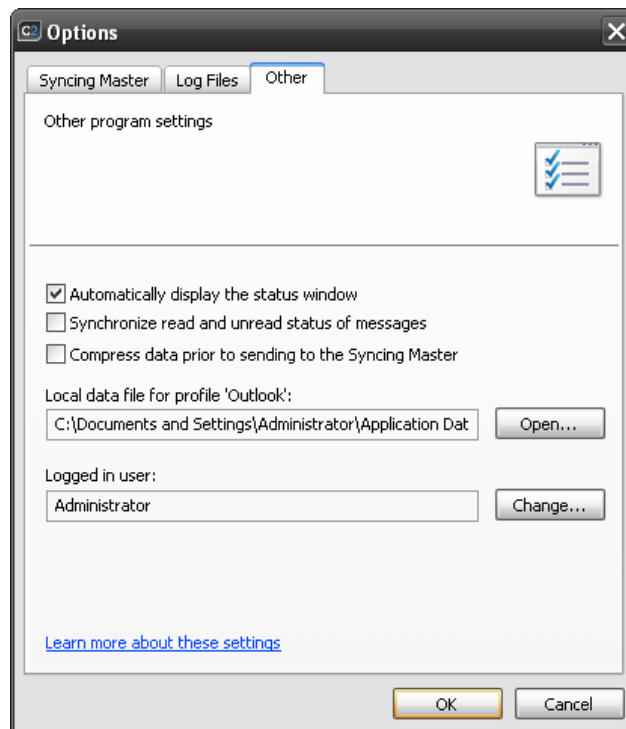


Fig. 33 The "Automatically display the synchronization window" option.

The synchronization status window automatically disappears in 3 seconds after it's displayed, but it can be displayed again by choosing the **Public Folders, Show/hide status window** option from the main Outlook menu or by clicking **Show/hide status window** in the CodeTwo Public Folders toolbar (Fig. 34).

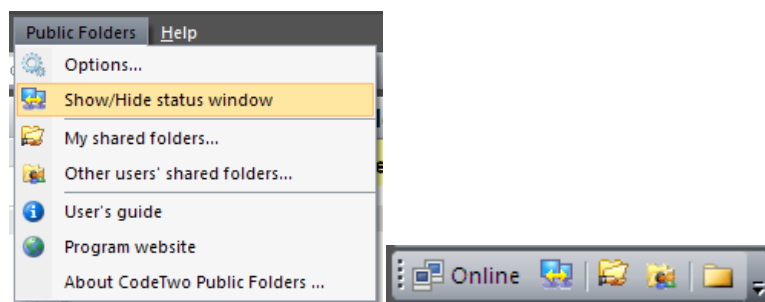


Fig. 34 The synchronization status window can be displayed or hidden at any moment by choosing the corresponding command from the "Public Folders" menu or from CodeTwo Public Folders toolbar.

While working with shared folders in the offline mode, you can perform the same tasks as if you were working online, unless you don't have the necessary access rights. In the offline mode, however, you can neither create new folders nor delete the existing ones, nor change their names. If you try to perform any of these tasks, you will receive an error message (see Fig. 35).

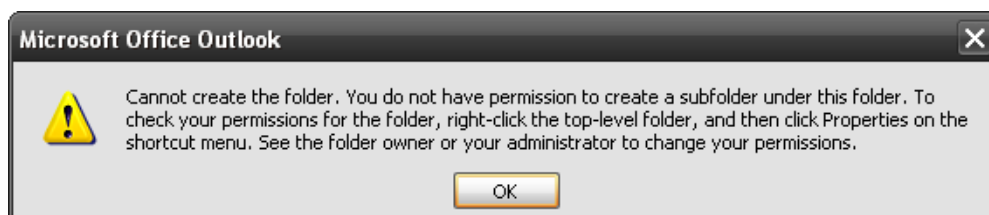


Fig. 35 In the offline mode you cannot create, delete or change folder names.

In the offline mode conflicts are likely as the same object may be changed by one client working online and by another client, working offline. Solutions for such situations are described in the [Resolving conflicts](#) chapter (see page 35).

8. CodeTwo Public Folders Toolbar

After installing the Outlook Add-in, a new **CodeTwo Public Folders** toolbar will be added to Outlook toolbar (Fig.36):



Fig. 36 CodeTwo Public Folders toolbar (in Online and Offline mode).

By default the toolbar is displayed, but you may choose to hide it by right-clicking Outlook toolbar. In the shortcut menu that displays, uncheck **CodeTwo Public Folders**. Follow the same steps if you want to bring the toolbar back.

The toolbar includes the following buttons:



Online Mode (connected to Syncing Master)



Offline Mode (disconnected from Syncing Master)

Connection to Syncing Master status - the user can see whether s/he is Online or Offline.



Show / Hide status window

The synchronization window button. The synchronization window displays every time the client goes Offline, reconnect to the Syncing Master, as well as during data synchronization. The window disappears automatically after 3 seconds after it appears, but this button allows to restore the window back at any time. The description of the status synchronization window can be found in [offline mode section](#) (see page 28).



My shared folders

The synchronization window button. The synchronization window displays every time the Outlook Add-in goes Offline, reconnect to the Syncing Master, as well as during data synchronization. The window disappears automatically after 3 seconds after it appears, but this button allows to restore the window back at any time. The description of the status synchronization window can be found in [sharing personal folder section](#) (see page 19).



Other users' shared folders

This button lets you add and remove other users' shared folders from **C2PublicFolders** list. Click this button to display a dialog box showing already open shared folders.



Show All Public Folders

This button lets you go to **C2PublicFolders** list with a single click. No matter which folder you are currently working in (e.g. Contacts or Calendar) or which view you are using, the **Navigation Pane** will display the Folder List, the top-level list folder will highlight (**C2PublicFolders**) and the **Reading Pane** will display the content of this folder.

9. Licensing

Do I have to renew the license annually?

No. Licenses for the software are perpetual. This means you are not obligated to renew it after 12 months. More, you have the right to update the application with all point upgrades regardless of the date of their release. For example, if you are a paid user of CodeTwo Public Folders 4.0, you can upgrade with all installers versioned 4.x. But at the same time, if you like the features of the newer 5.0 version once it is released, you might need to pay for the upgrade.

Do I need a license for each user or each workstation?

You need to purchase a license for each workstation that will take part in sharing Outlook data with CodeTwo Public Folders. If a workstation is used by 2 users, one on a morning shift, another on an afternoon shift, only one license is required for this computer.

Do I need two licenses for the desktop computer and laptop that are used by one user?

Please see the previous question. One license is required for each computer. Even if the desktop and laptop are used by the same user, two licenses are needed for proper functioning of the program.

Activation

Once the order is completed, the user will receive a license key, which will upgrade the program from the demo version to full version.

Read more about [activation of the program to full version](#) on page 35.

Upgrading

The upgrade from all earlier versions to CodeTwo Public Folders version 4.5 is free of charge!

Additional licenses

You can buy additional licenses if you want to equip more computers in Outlook data sharing feature. The price for additional licenses is lower than during the initial purchase. To purchase additional licenses, place a new order. The additional licenses will be added to your existing license key. You will need to repeat the activation procedure in the **Licensing** program to increase the number of licensed machine.

Trial version

The trial version is fully functional and its only limitation is that it cannot be used longer than 30 days.

Before or after this period expires you can activate the trial version of the program to the full version. After you activate, you will be able to use the program without any limitations, and all settings as well as the data used in the trial period will be kept.

9.1. Activation

The trial version of **CodeTwo Public Folders** is activated to the full version by entering a special license key that is sent to you after completing the order.

If you have purchased a 20-CAL license, your license key will let 20 Outlook Add-ins to connect to the Syncing Master.

To run the Licensing program, click **Start, Programs, CodeTwo, CodeTwo Public Folders** and click **Licensing**. The dialog box that opens will let you activate the program (Fig. 37).

To activate **CodeTwo Public Folders**, paste the received license key into the **License Key** field and click **Activate**.

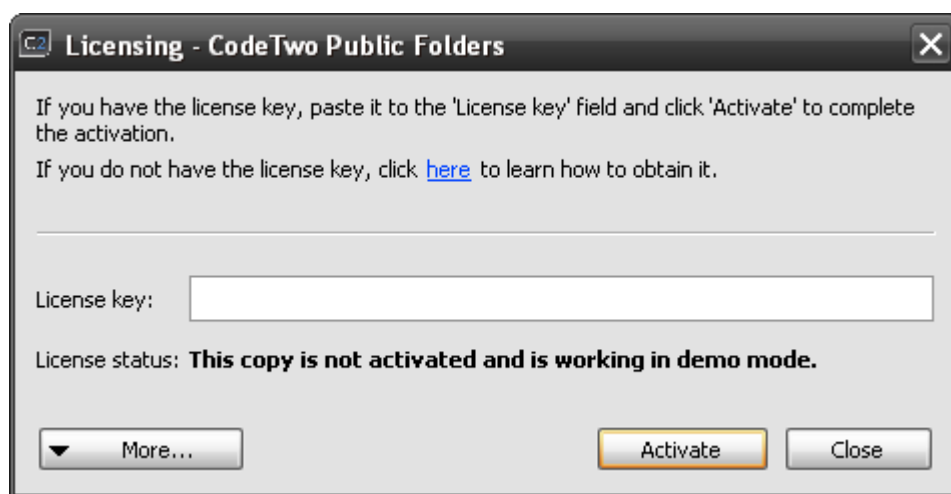


Fig.37. The license key entered into the activation dialog box of CodeTwo Public Folders.

After you activate, the **License status** field will display information on the number of currently licensed computers.

Now you can use **CodeTwo Public Folders** without the limitation of the trial version.

The activation of the program requires **internet access**. If you cannot access the Internet, you can choose to activate over the **phone** or **email**. Both these options are available after clicking the **More** button in the activation dialog box (Fig. 38).

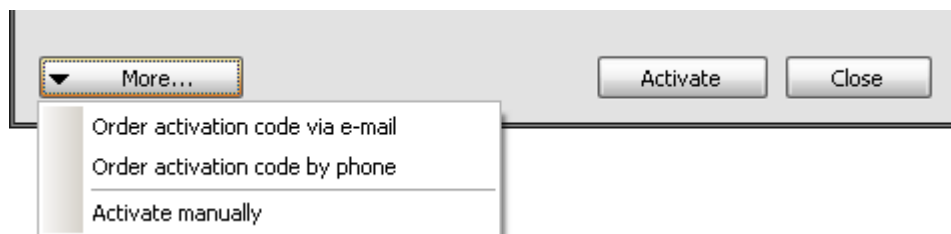


Fig.38. Menu with additional options for activation of CodeTwo Public Folders.

10. Advanced Topics

10.1. Resolving Conflicts

10.1.2. Simultaneous Work on the Same Element

In an environment with many users working on the same data, there is a danger of mutual overwriting data if users are working on the same element at the same time. Preventing such situations is an important functionality of the software. When several users open the same element at the same time in order to change it, after the first one saves the changes, the others will be working with the outdated copy of the element and they will have to open this element again. When a user tries to save changes on the outdated copy, he will be informed about it with the following message:

"It has not been possible to save the element because it has been changed by another user. Do you want to create a copy of the element in the default folder?"

The user can save the element in the personal default folder and check the changes made by another user. In that way no data will be lost.

10.1.3. Return From the Offline Mode

A user who is working with public folders in offline mode can create new and delete old elements, and can also edit the existing elements. All these changes are saved locally on the user's computer and transferred to Syncing Master at the moment of getting connected. In a similar way, all changes made on the Syncing Master at the time when the given Outlook Add-in was working offline are transferred to the Outlook Add-in at the moment of getting connection.

Conflicts in the offline mode are unavoidable. The same element may be worked on by one client online and by other clients in the offline mode. In such cases, the CodeTwo Public Folders uses an algorithm "the last one prevails" - which means that the changes made by the last client returning from the offline mode are transferred to the Syncing Master. If an element has been changed first at Client A working online, and then at Client B working offline, at the moment of connecting Client B to the Syncing Master, he will overwrite the changes made by Client A.

If some element has been only changed at Client A, working online, this change will be obviously recorded by Client B, when he returns from the offline mode.

The situation is slightly different when Client A that is working online removes a folder, and Client B that is working offline makes changes to the elements in this folder. At the moment of Client B getting connected, the folder will be deleted and changes made to it will not be saved.

A situation in which a user working on the Client B computer in the offline mode have made changes to elements of the folder. Meanwhile, an administrator has deprived this user of the right to edit elements in the folder. When Client B re-establishes connection to the network, the changes he/she has made offline to the Syncing Master will be transferred, even though he was deprived of the right to edit elements in this folder.

10.2. Limitations

10.2.1. Data Synchronization

When one of the users changes data in the public folders, this data is being immediately circulated by the Syncing Master module among all Outlook Add-ins currently working within the network. At start up, an Outlook Add-in can download from the Syncing Master all changes made to the public folders at the time when the Outlook Add-in was not connected. CodeTwo Public Folders instantly synchronizes all the changes made by the users to the public folders and elements, except for the cases below. In the current version the following changes are not being synchronized:

- Elements in the root folder named C2PublicFolders.

- Custom user forms published in folders.
- Comments created in the folder properties.
- User group definitions specified in folders of Calendar type as "Group Schedules".
- Folder group definitions specified as "Activities" in folders of Contacts type.

By design CodeTwo Public Folders does not synchronize items from the special folders named "Deleted Items" and "Search Folders".

10.2.2 Default Folders

In the current version, CodeTwo Public Folders cannot be defined as a location of mail delivery. Some limitations arise from that fact. Since there must be a location where mail is being delivered in the Outlook profile, the profile has to include "Personal Folders", in addition to public folders. In that case, Outlook default folders, such as Inbox, Outbox, Calendar, Tasks, are created in personal folders and in the public folders there is no functionality closely related to default folders:

- Reminders are not generated. This limitation does not apply to Microsoft Outlook 2007.
- Mail cannot be directly received in the public folder. If this is required, this restriction can be easily evaded by applying a rule to the inbox, which will transfer the incoming messages to a chosen public folder.
- After creating a meeting request in a public calendar, the responses of the participants will not be automatically processed by the Outlook.
- After assigning a task (in a public folder) to users with the "Assign Task" button, it cannot be sent as an e-mail message.

The only default folders automatically created in public folders are folders "Deleted elements" and (in Outlook 2003 / 2007) "Search Folders". These folders are not treated as public folders and they are separate for each user. When a user removes an element from public folders, it is moved to the folder "Deleted elements" in their public folders but it is not synchronized and remains invisible for users of other computers.

10.2.3 Size Limitation

A local copy of public folders is stored in PST file in each computer with an Outlook Add-in installed. Owing to this, a user is able to work with public folders in offline mode when CodeTwo Public Folders Syncing Master is unavailable. Each user of a computer has their own separate PST file in which data from public folders visible to them is stored. If Microsoft Office Outlook version 2003 or 2007 is installed on a computer, the size of the file cannot exceed 20 GB. If an earlier version of Outlook is installed, the size of the file cannot exceed 2 GB.

If the size of the file reaches the limit, a warning will be displayed. In order to reduce the size of local PST file, you can compact the file, remove some unnecessary data from public folders or remove a user's right to see certain folders.

The size of data stored in the module of CodeTwo Public Folders Syncing Master is unlimited (the only limitation is the availability of free space on a disk).

11.Summary

Online User's Manual

On our webpage www.codetwo.com you can also find the [online User's Manual](#), with [Frequently Asked Questions](#) section.

Technical Support

Users who are using the trial versions of our software are entitled to a free technical support via e-mail , phone, chat, or Online Meeting.

User who purchased the full version or an upgrade are entitled to 12-month technical support via e-mail and 2-month LIVE Support conducted by phone, chat, or Online Meeting.

Technical Support hours are Monday through Friday from 8 AM - 4 PM (UTC), except for public holidays.

Before asking a question, please refer to our [Knowledge Base](#) at www.codetwo.com/kb/ for possible solution. It contains the answers to the most common questions. If you have not found a solution, then ask a question or report a problem.

Please contact us with one of the methods below:



Contact Us by Phone: +48 75 646 1002



Contact Us By Email: support@codetwo.com

More Information

More information about CodeTwo Public Folders can be found on www.codetwo.com/public-folders/

The software can be downloaded from www.codetwo.com/public-folders/download/

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