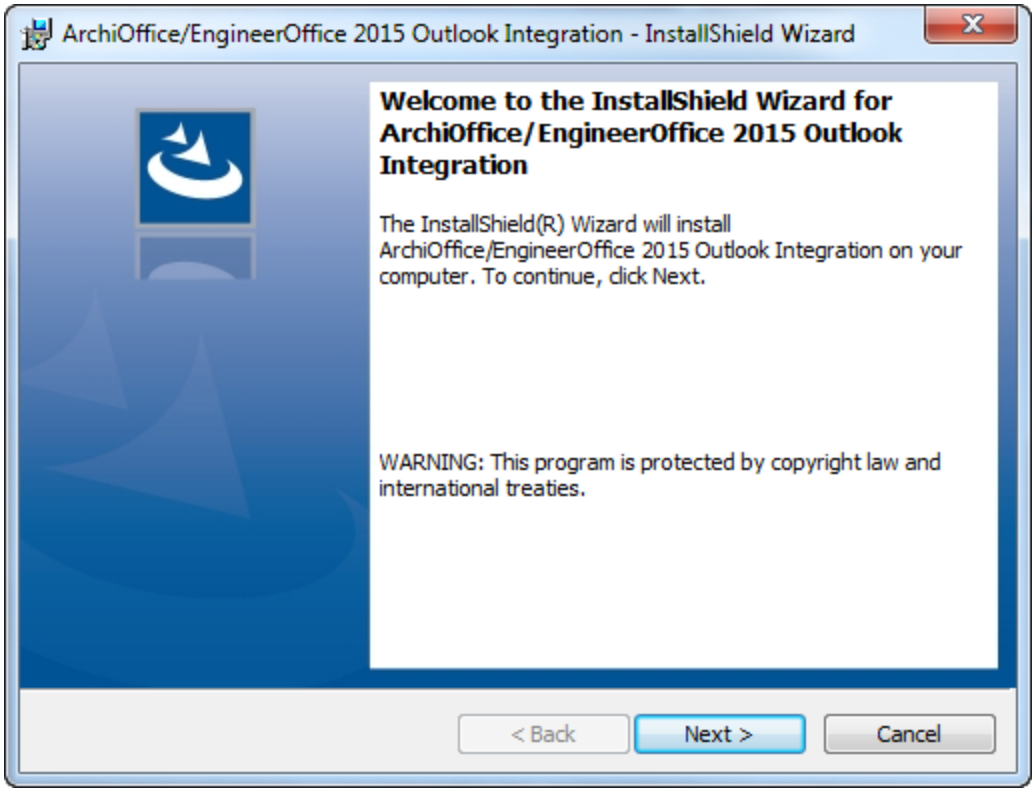
# ArchiOffice/EngineerOffice-Outlook Integration 2015

# ArchiOffice/EngineerOffice-Microsoft Outlook Integration

The following information walks you through the steps of integrating your ArchiOffice or EngineerOffice 2015 data with the Microsoft Outlook program. *The ArchiOffice/EngineerOffice-Outlook integration is only supported on Windows version of Outlook 2003 or later.*

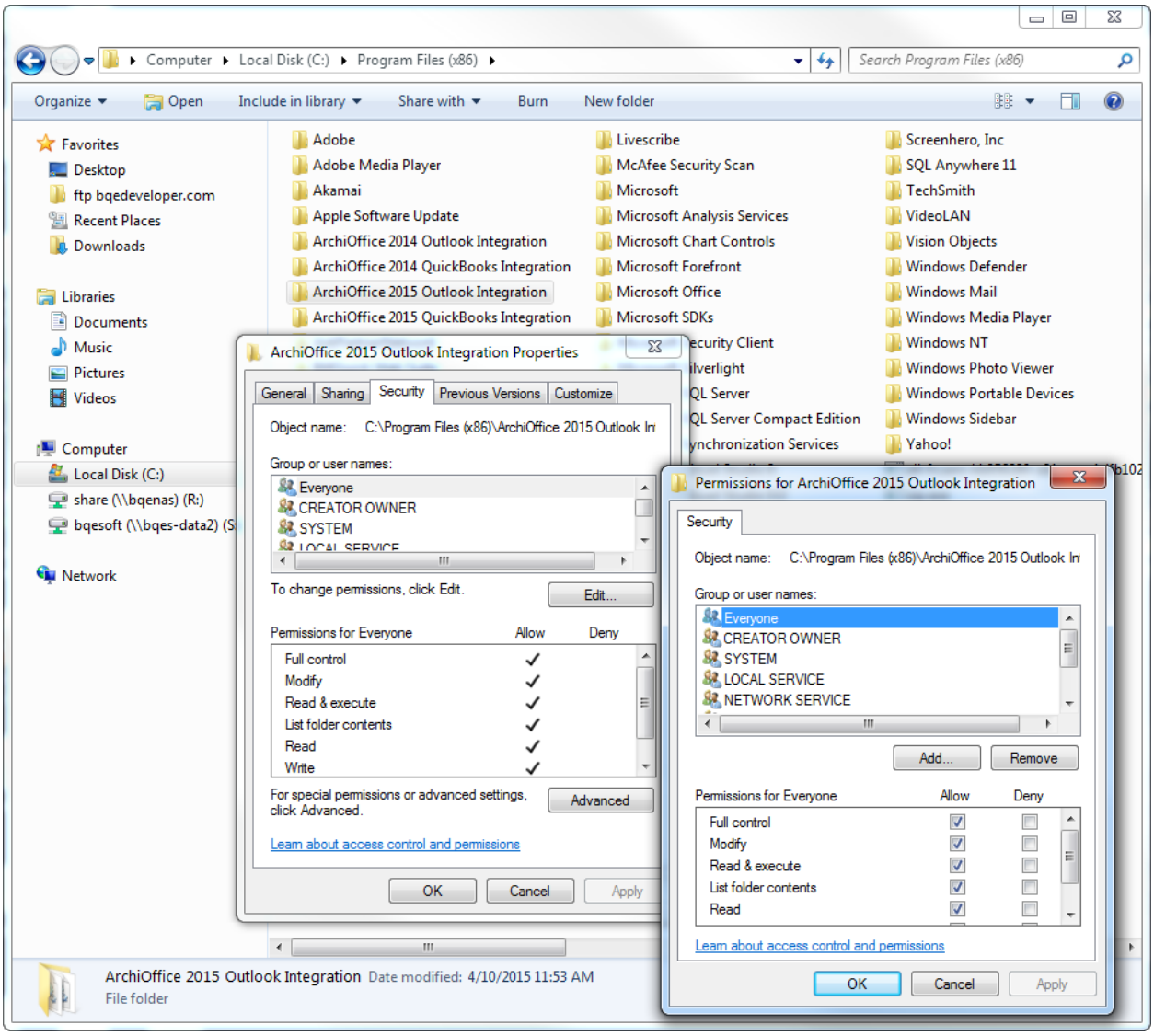
Step 1:

1. Download ArchiOffice-Outlook Integration Tool and save it to your desktop. Download EngineerOfficeOutlook Integration Tool from here. ArchiOffice/ EngineerOffice 2015 must already be installed on your server.
2. Right-click on the program file (setup.exe) and select *Run as administrator*.
3. Follow the on-screen instructions on the wizard to install the tool.




Step 2:

1. Release all security permissions on C:\Program Files (x86)\ArchiOffice 2015 Outlook Integration. Right-click on the ArchiOffice 2015 Outlook Integration folder and select Properties.
2. Click on the Security tab.

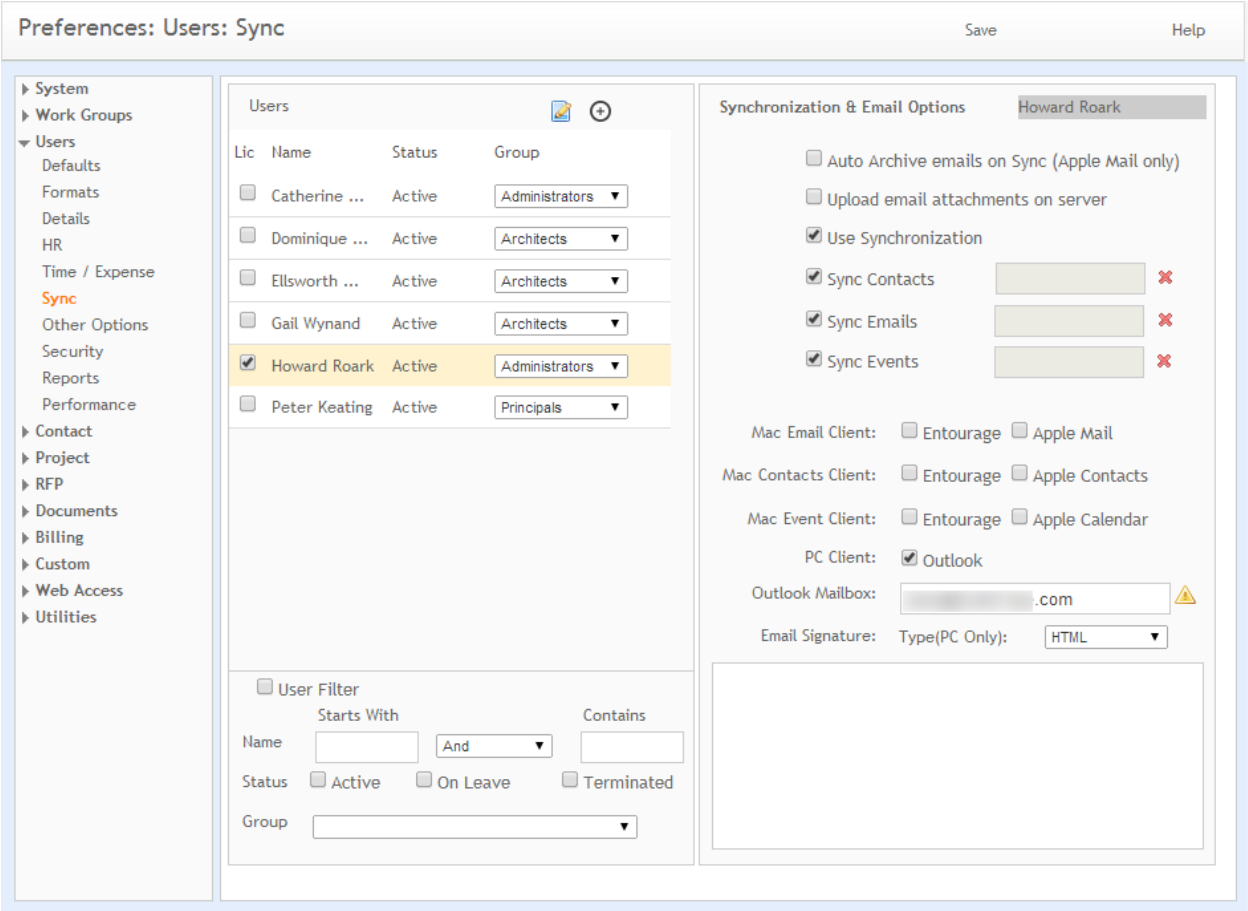



3. Click Edit and then add the following users or groups:

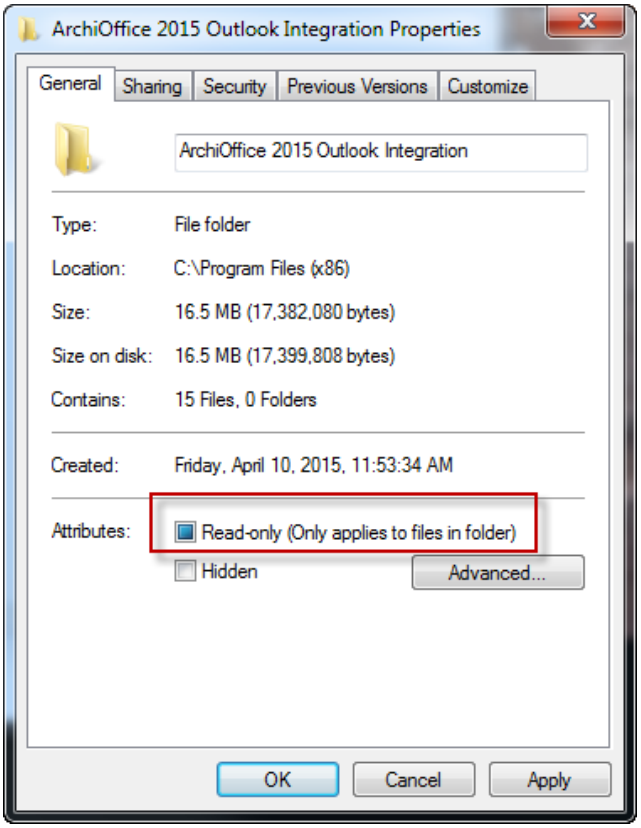
   - Everyone
   - IIS_IUSRS *(if it exists)*
   - IUSR *(if it exists)*
   - LOCAL SERVICE
   - NETWORK SERVICE
   - Users *(if it exists)*
   - Domain Users *(if applicable)*

4. Select the Allow check box for Full Control and other permissions.

5. Click Apply and then OK.




In addition, uncheck the Read-only option on the ArchiOffice 2015 Outlook Integration Properties screen.

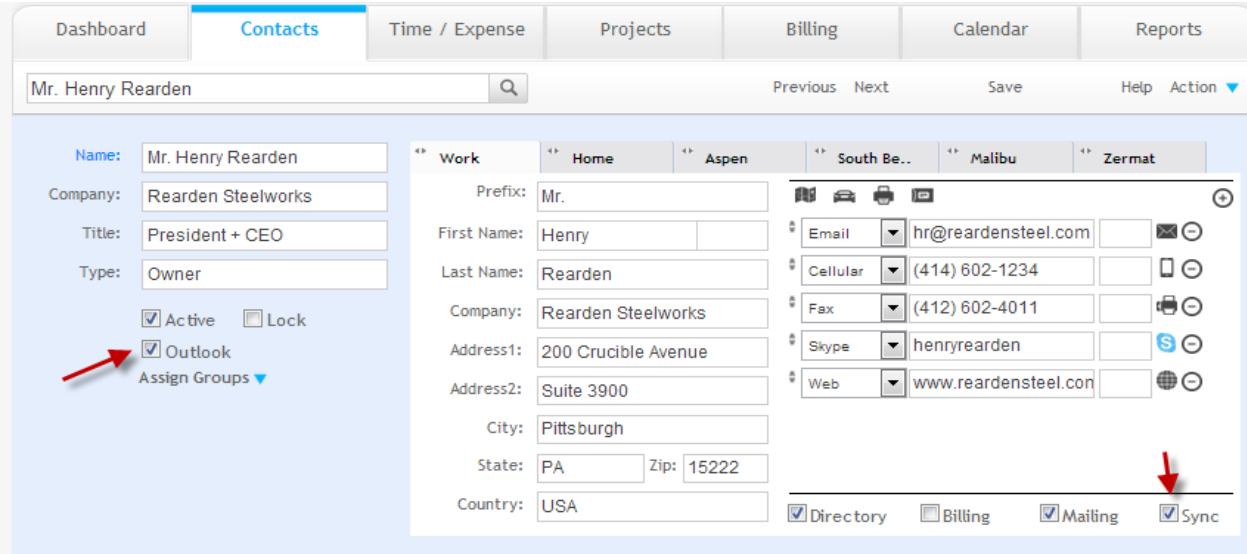


Step 3:

1. Set up the Outlook account in ArchiOffice > Preferences > Users > Sync screen.
2. Check the *Upload email attachments on server* and *PC Client: Outlook* options.
3. Make sure that whatever the name of your Mailbox is in Outlook, the same must be entered in ArchiOffice (it is case-sensitive as well). Some variations are as follows:
    - Mailbox – Howard Roark
    - Personal Folders
    - *Yourname@yourdomain*.com

If you try to sync twice in one day, clear the date in Preferences > Users > Sync by clicking **X** against the Sync item. If the date is not cleared, when you initiate a second synchronization, the program finds the same date for Last Synced and assumes that it has done the synchronization. So, nothing will sync this time.

4. To sync contacts from ArchiOffice or EngineerOffice to Outlook, make sure in the Contacts records the Outlook, Directory and Sync options are checked.

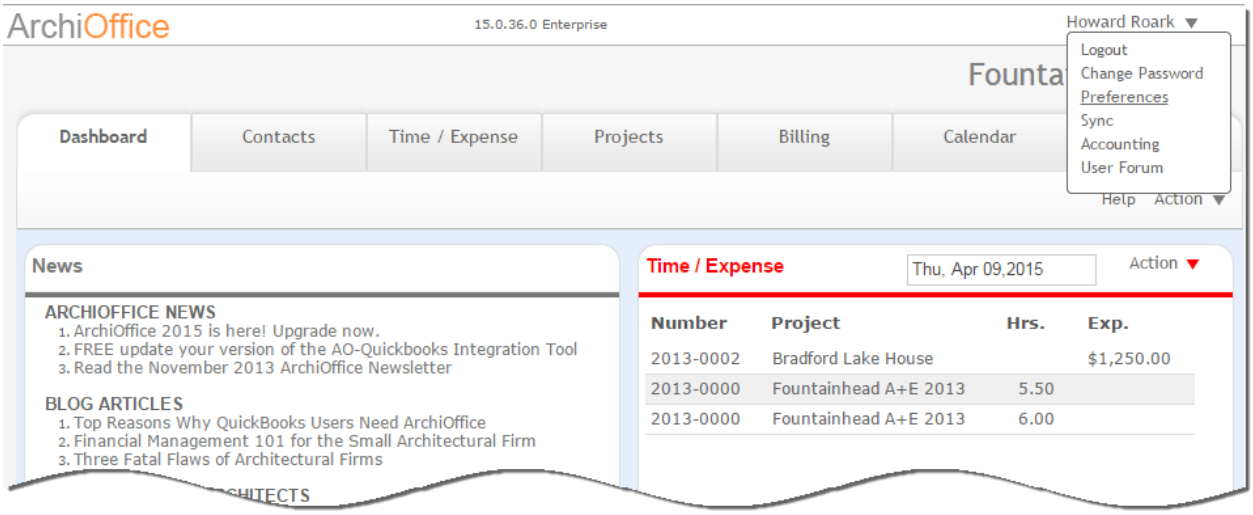



If you have multiple addresses, only the tab that has the Sync box checked gets data synced to Outlook. For example, in the above screenshot, only the information on the Work tab will sync with Outlook.

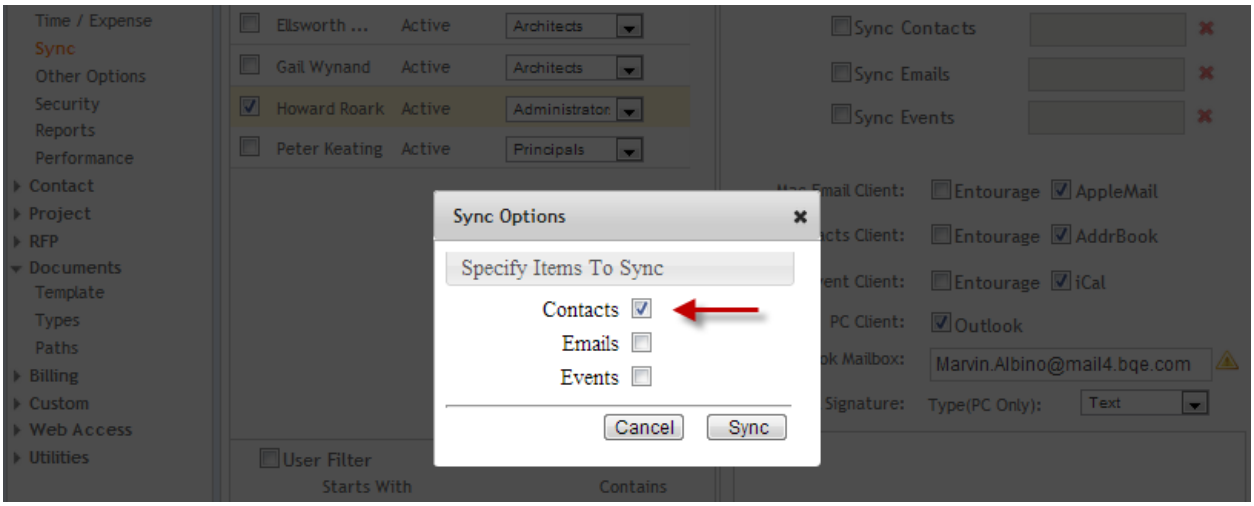
5. If you are syncing employees specifically, their Contact Type should be set to *Employee*.

Step 4:

1. To use the Outlook synchronization feature, click the user name on the top-right of ArchiOffice desktop and then click Sync on the drop-down list.

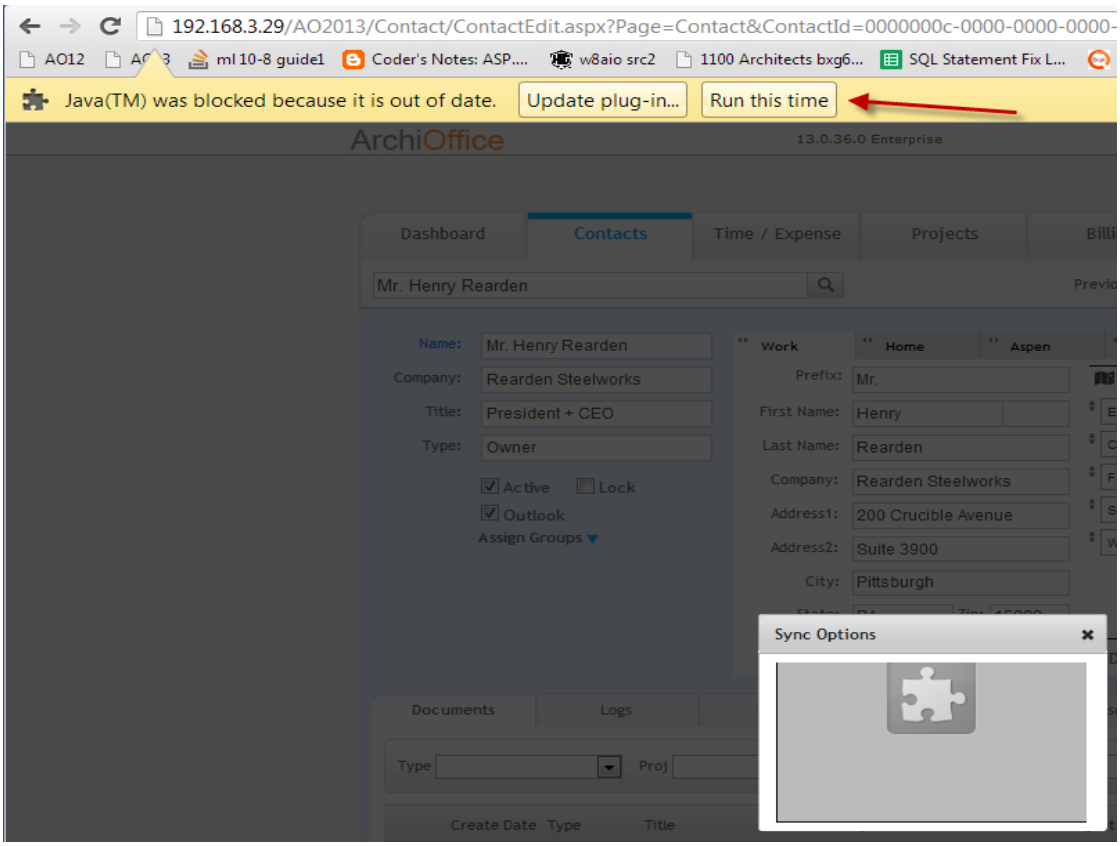



2. To sync contacts, check the Contacts option and then click Sync. We recommend designating one person to sync the Outlook items to avoid any duplicates.

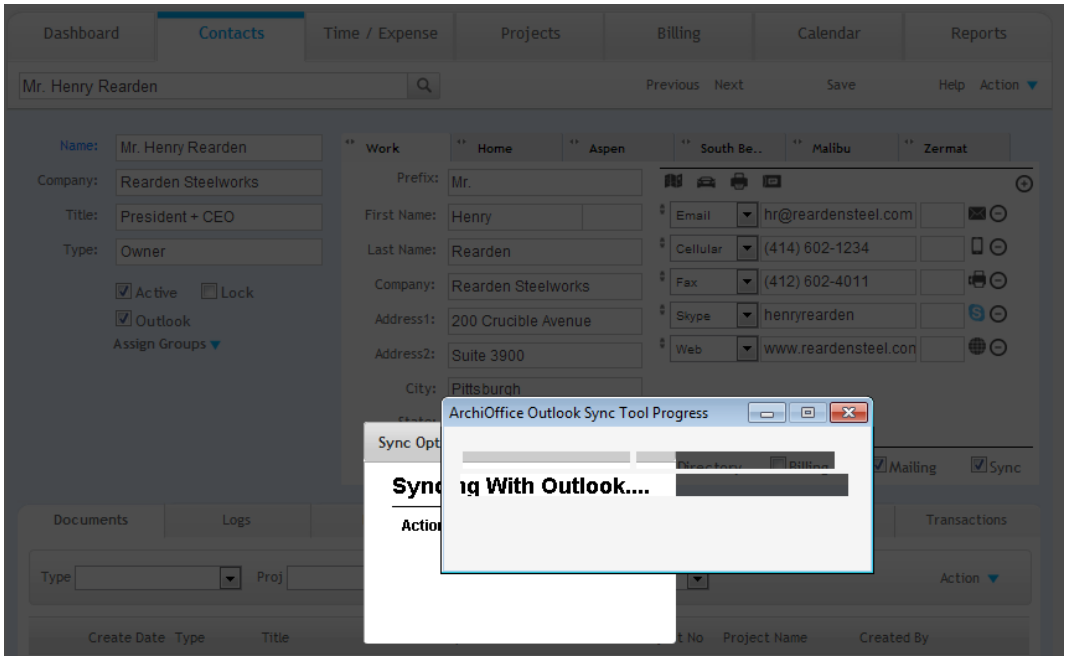



3. If you get a Java block, just click *Run this time* or *Later*, depending on the message you get.

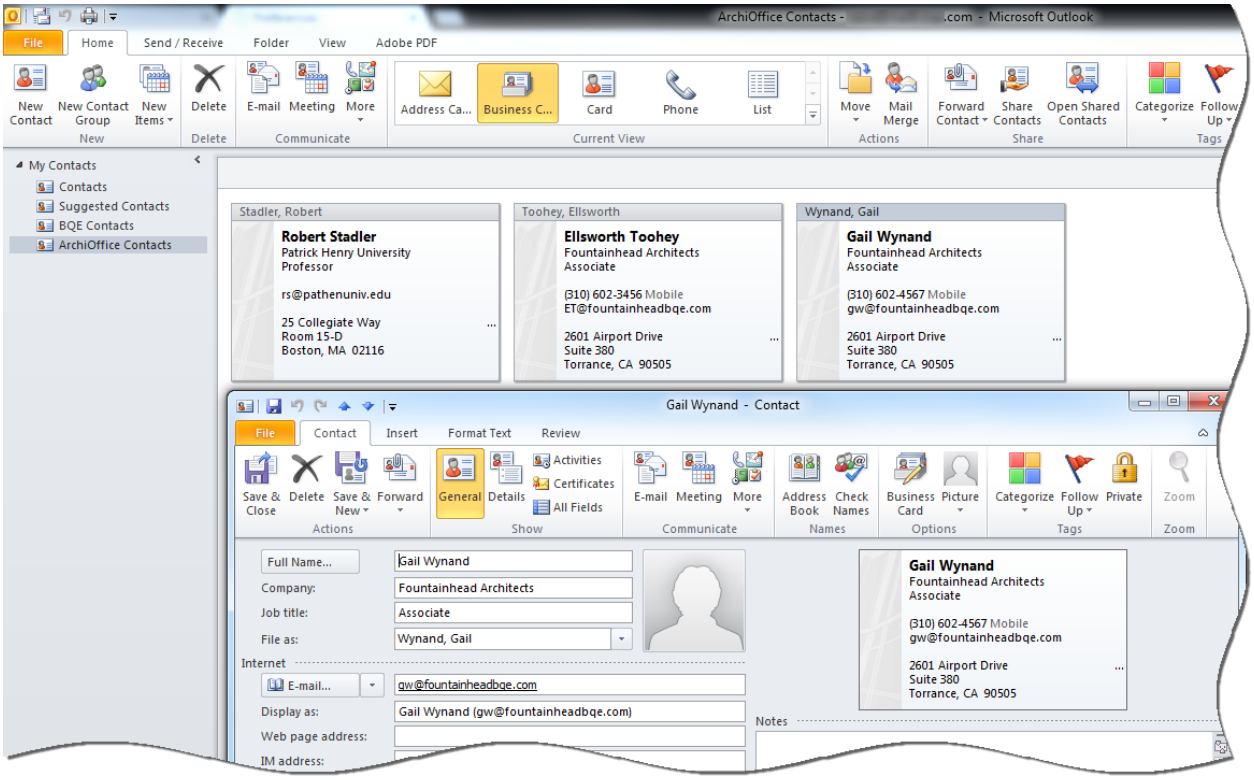
The synchronization tool requires Java and works with its current version.




After the synchronization starts, you will see its progress.

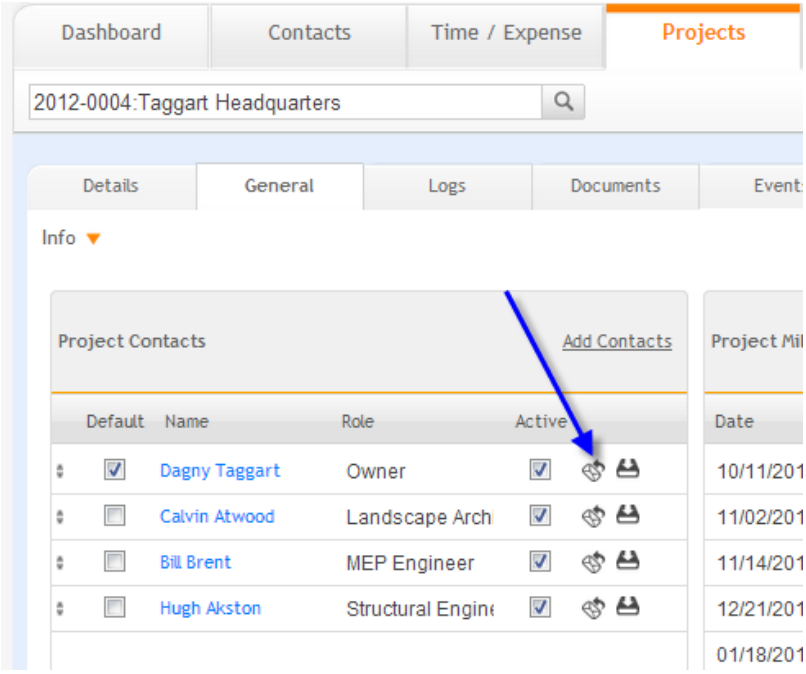


4. As you will notice in your Outlook program, the synchronization tool creates its own contact group called *ArchiOffice Contacts* so that it won't interfere with your regular *Outlook Contacts* group. *The ArchiOffice Contacts group name is a system defined name and must NOT be renamed.*

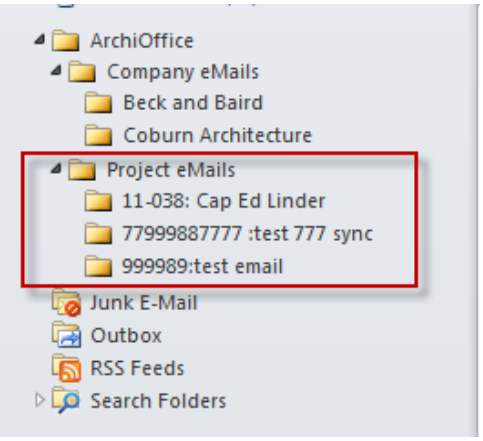



5. To create Project eMails folder in click the email icon on the Projects > General > Info screen for the Main contact with a valid email address to open the Sync Options screen.

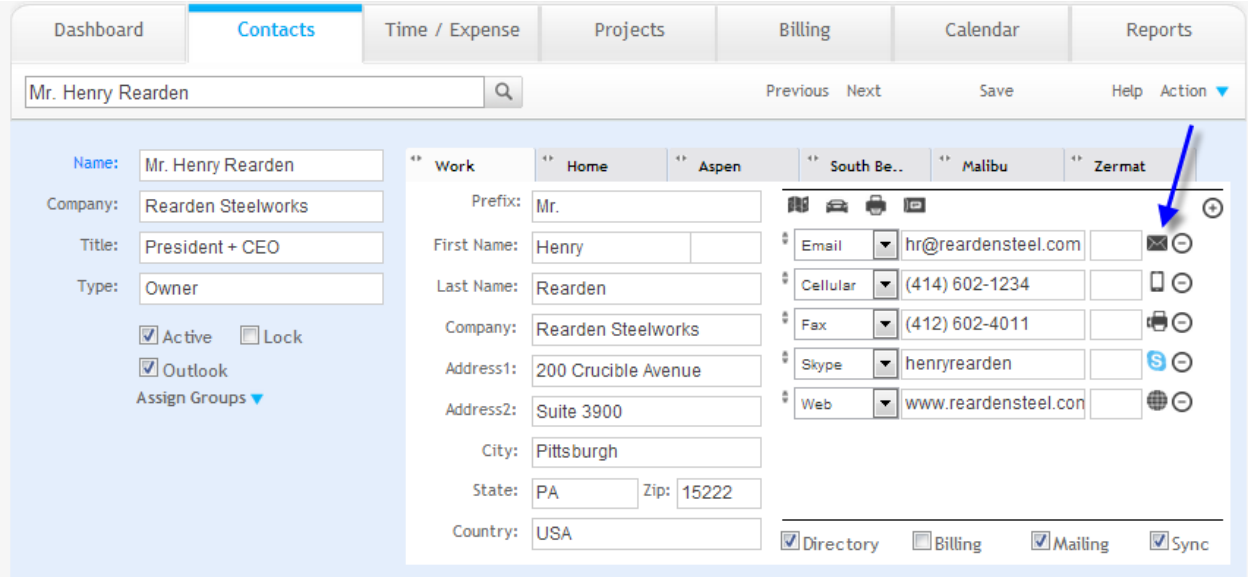
6. Check the Emails option and then click Sync. This will initiate the Project eMails folder creation under ArchiOffice > Project eMails > [*Project Number:Name*] with a blank email. Delete the email and don't save changes



The ArchiOffice Project eMails group name is a system defined name and must NOT be renamed.

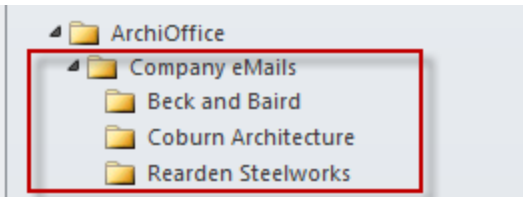



7. To create Company eMails folder, click the email icon on the Contacts screen for a contact with a valid email address to open the Sync Options screen.

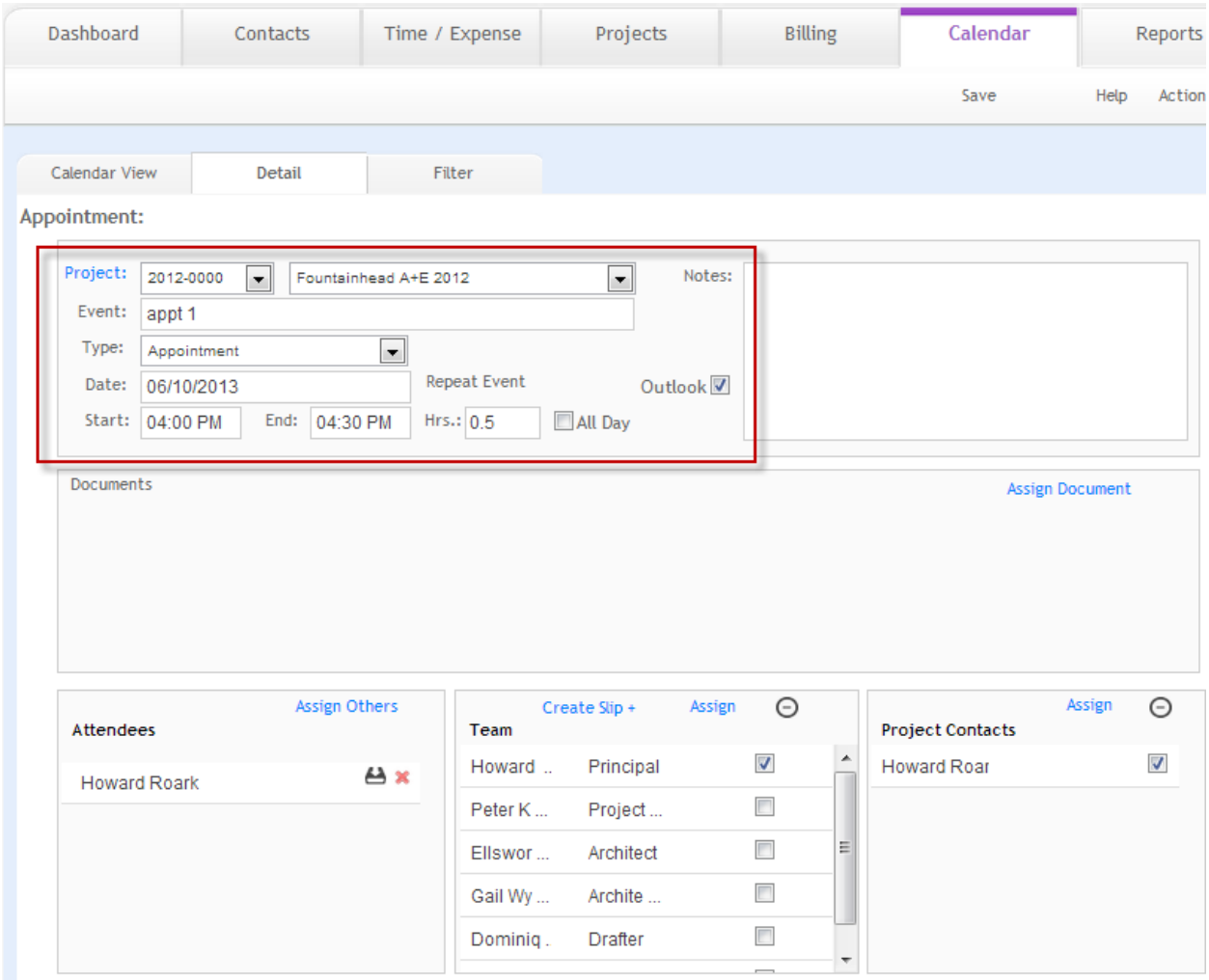



8. Check the Emails option and then click Sync. This will initiate the Company eMails folder creation under ArchiOffice > Company eMails > [Company Name] with a blank email. Delete the email and don't save changes.

   The ArchiOffice Company eMails group name is a system defined name and must NOT be renamed.



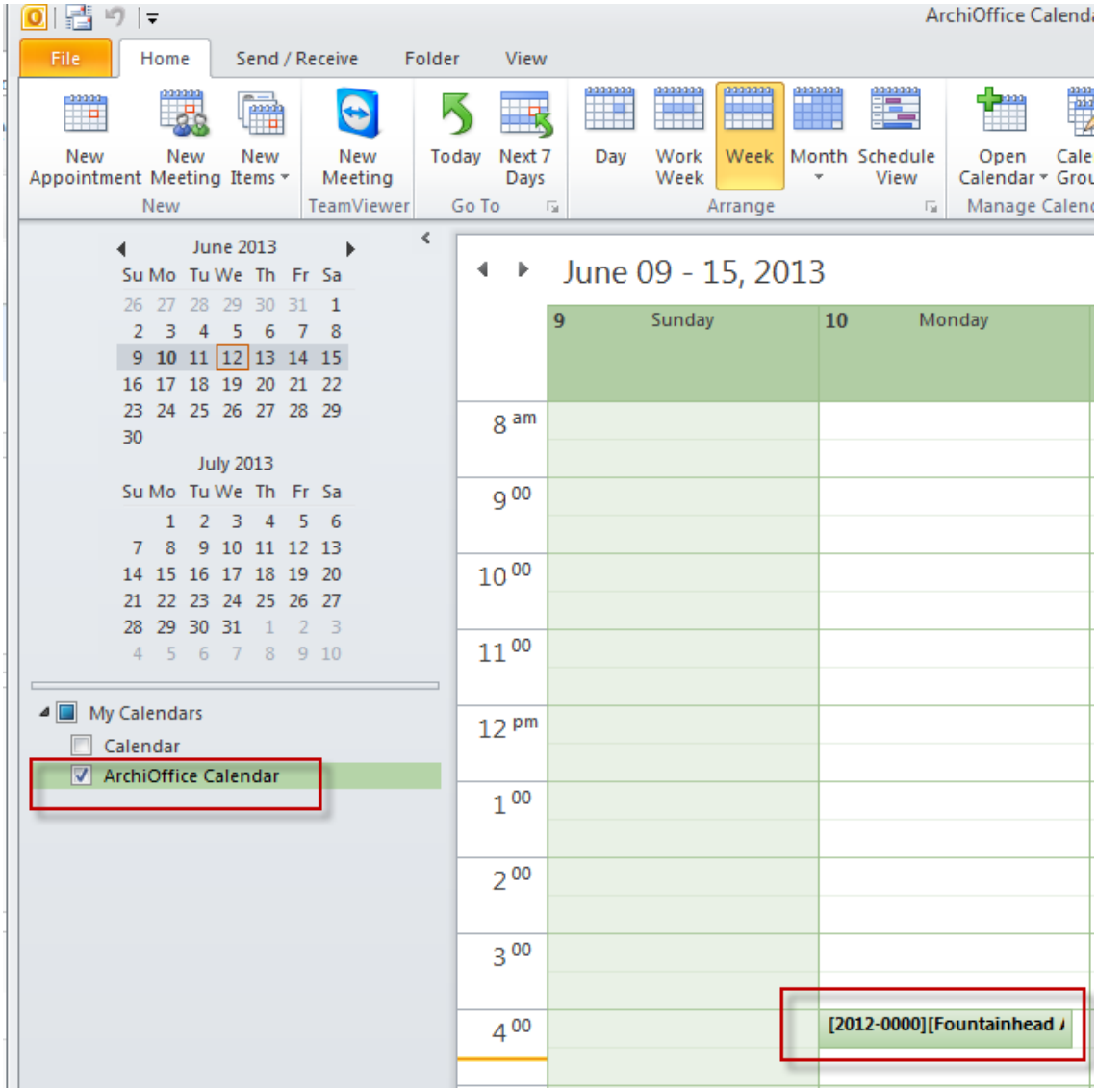

9. To create Calendar items in ArchiOffice or EngineerOffice, make sure the entries are complete.




10. Then sync the calendar details by clicking the user name on the top-right of ArchiOffice desktop. Click Sync on the drop-down list to open the Sync Options screen.

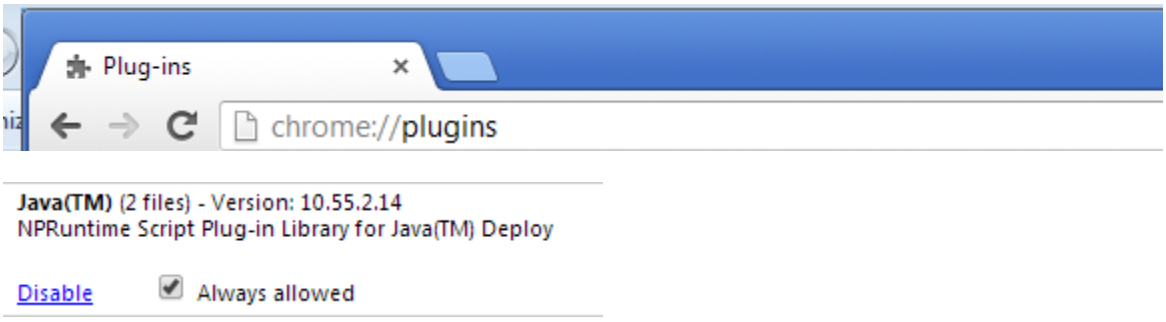
11. Check the Events option and then click Sync. When you have finished, verify the item in Outlook.

For Emails and Calendar, the synchronization tool will create its own group as well. *Just like in Contacts, the ArchiOffice folder structure is system defined and must NOT be renamed or moved*; otherwise the link between the two will be broken.



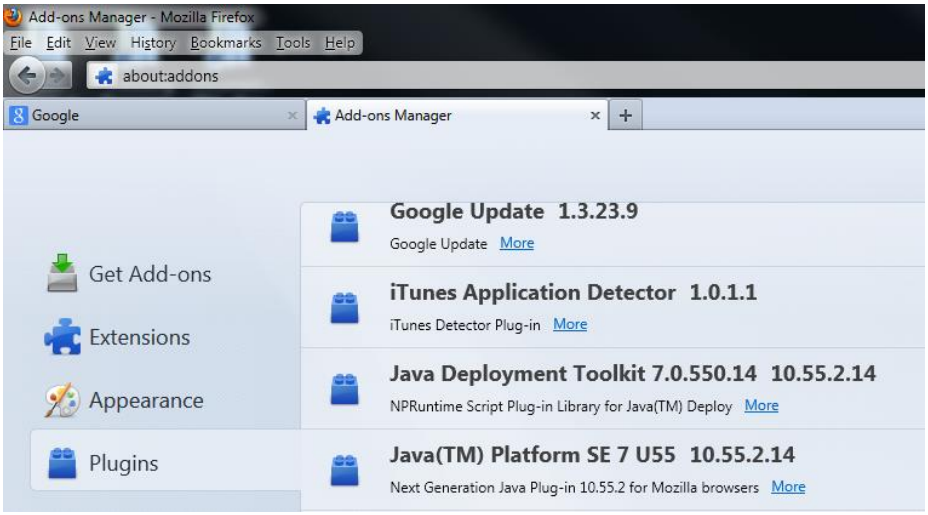

We recommend checking the plug-ins for the browsers to make sure that the correct Java plug-in is enabled.

Chrome:



### Firefox:

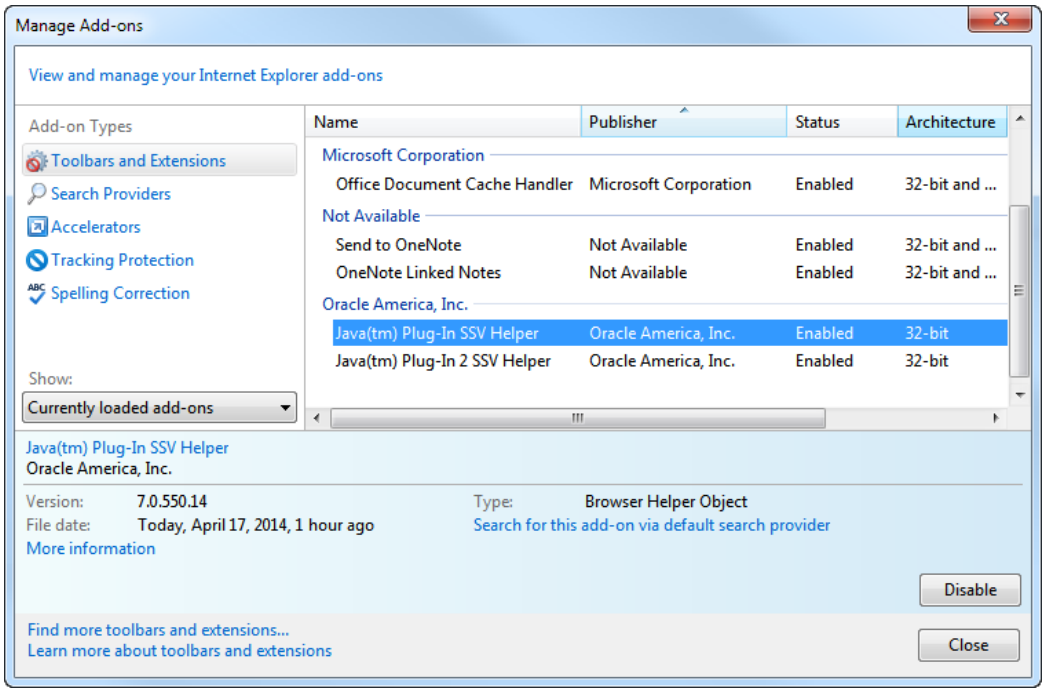
Click Ctrl+Shift+A to show plug-ins window.




Make sure the plug-in panel is blue and enabled.

### Internet Explorer:

Tools menu > Manage add-ons.




If you need further troubleshooting tips, you can go to the BQE Knowledge Base or contact us at (310) 602 4030.

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