

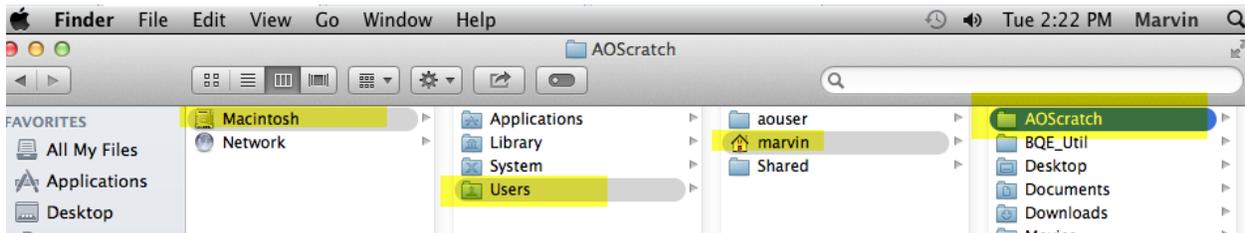
ArchiOffice/EngineerOffice -Apple Integration

ArchiOffice/EngineerOffice-Apple Integration

The following information walks the ArchiOffice (or EngineerOffice) users through the steps of integrating their data with Apple Mail (AppleMail) or Microsoft Entourage, Apple Contacts/Address Book, and Apple Calendar/iCal programs on a Mac system.

Step 1: General

1. Create an AOScratch folder in Finder, for example, `/Users/[username]/AOScratch`



Note: We have users create AOScratch folder in their personal username folders because Mac will automatically have the 'read/write' permissions needed for this folder.

2. Create a subfolder in AOScratch named AppleScript. This is important only if you want an explicit scratch folder defined in Preferences. Otherwise, the sync tool will automatically load the AppleScript in a folder called BQE_Util under your home directory (`/Users/[username]`).

ArchiOffice Calendar event syncing for Mac OS 10.9 (Mavericks) or later might not work as expected if 'Use a 24- hour clock' in Date and Time preferences (Mac Calendar) is checked. Please ensure this setting is unchecked before starting the event synchronization.

In addition, make sure Mac System Preferences are set up to have the correct date format, as most systems are set to be a 2- digit year:

USA: mm/dd/yyyy

International: dd/mm/yyyy

Step 2: ArchiOffice/EngineerOffice Synchronization Setup

1. Check and set the Apple Mail, Apple Contacts, Apple Calendar or Entourage options in ArchiOffice > Preferences > Users > Sync screen for the user who will sync that data.
2. Check the *Upload email attachments on server* and *Use Synchronization* options.

Preferences: Users: Sync Save Help

- ▶ System
- ▶ Work Groups
- ▼ Users
 - Defaults
 - Formats
 - Details
 - HR
 - Time / Expense
 - Sync
 - Other Options
 - Security
 - Reports
 - Performance
- ▶ Contact
- ▶ Project
- ▶ RFP
- ▶ Documents
- ▶ Billing
- ▶ Custom
- ▶ Web Access
- ▶ Utilities

Users  

Lic	Name	Status	Group
<input type="checkbox"/>	Catherine ...	Active	Administrators ▼
<input type="checkbox"/>	Dominique ...	Active	Architects ▼
<input type="checkbox"/>	Ellsworth ...	Active	Architects ▼
<input checked="" type="checkbox"/>	Howard Roark	Active	Administrators ▼
<input type="checkbox"/>	Peter Keating	Active	Principals ▼

User Filter

Name Starts With And Contains

Status Active On Leave Terminated

Group

Synchronization & Email Options Howard Roark

Auto Archive emails on Sync (AppleMail only)

Upload email attachments on server

Use Synchronization

Sync Contacts ✖

Sync Emails ✖

Sync Events ✖

Mac Email Client: Entourage AppleMail

Mac Contacts Client: Entourage AddrBook

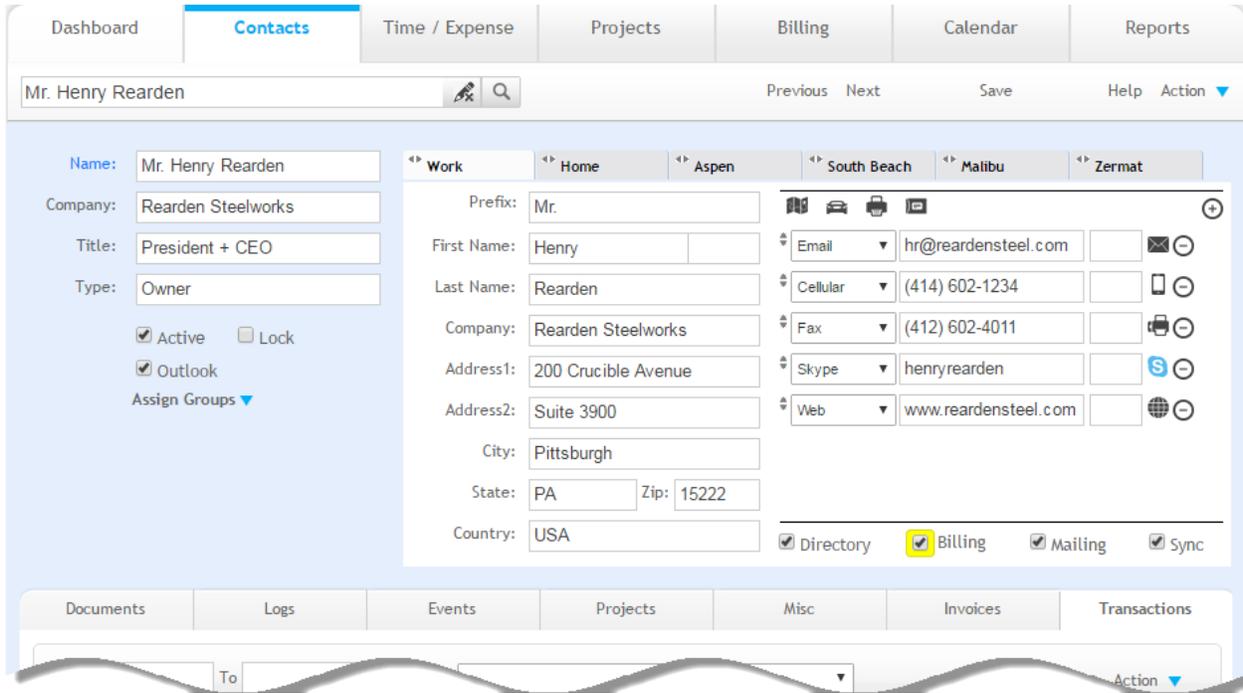
Mac Event Client: Entourage iCal

PC Client: Outlook

Outlook Mailbox: ⚠

Email Signature: Type(PC Only):

3. If you try to sync twice in one day, clear the date here by clicking X against the Sync item.
If you do not clear the date, 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. The *Auto Archive emails on Sync* option gives you the flexibility of auto archiving synced emails in the Mac email program (Apple Mail only). Check this option if you plan to sync 100 or more emails.
5. To sync contacts from ArchiOffice or EngineerOffice to Apple Mail or Entourage, make sure in the Contacts records the Apple Contacts or Entourage, Directory, and Sync options are all checked.

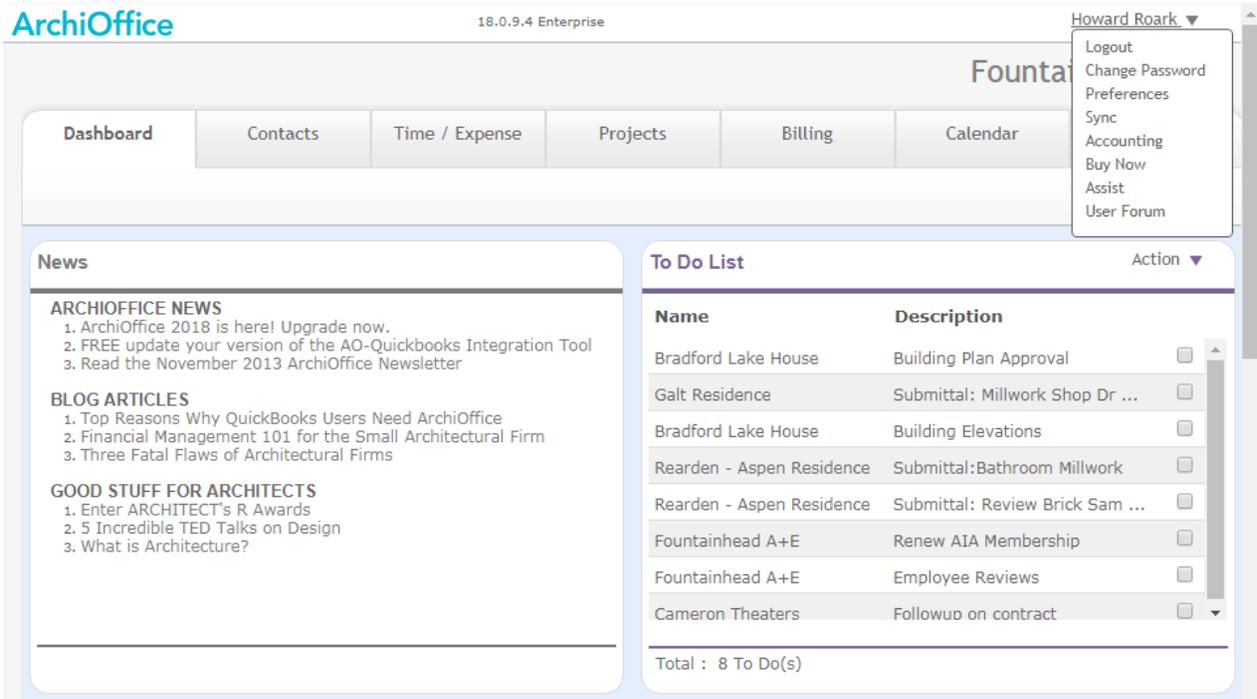


If you have multiple addresses, only the tab that has the Sync box checked gets data synced to Apple Contacts or Entourage. In the screenshot above, it is only the information on the Work tab that will be synced to Apple Contacts or Entourage.

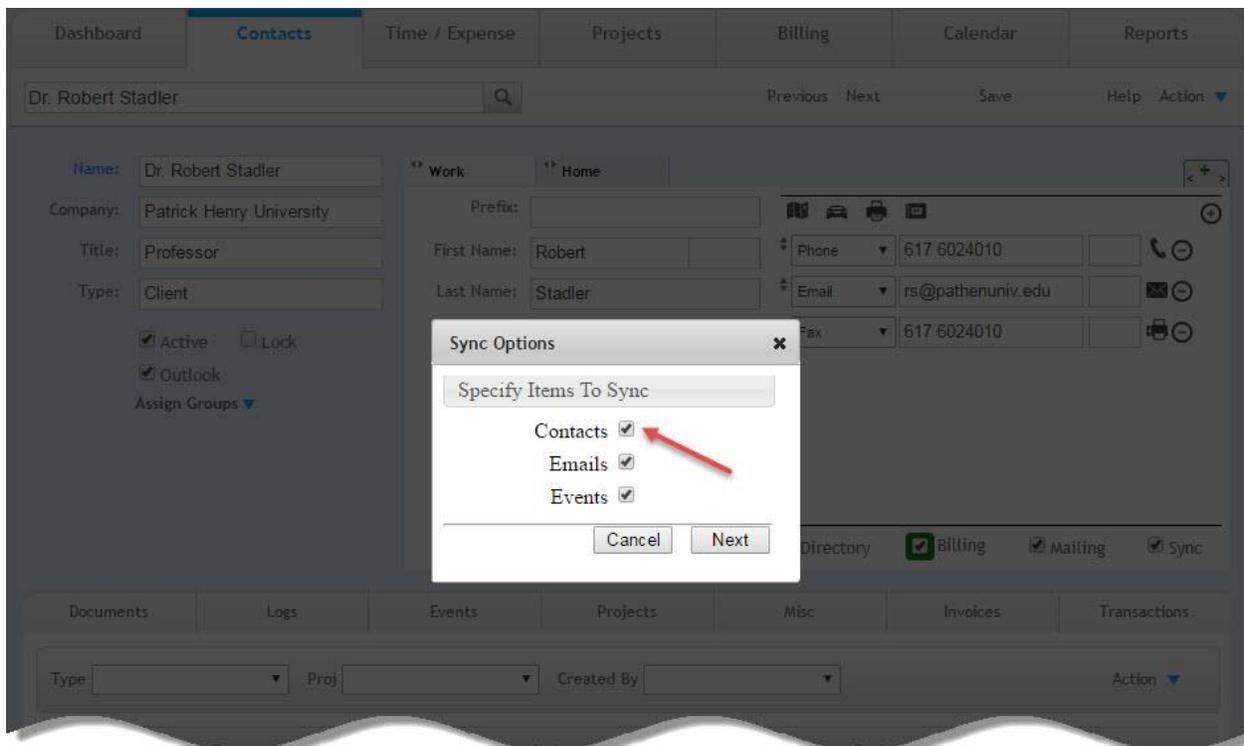
6. If you are syncing employees specifically, their Contact Type should be set to *Employee*, and both the Apple Contacts and Sync boxes should be checked.

Step 3: Sync Contacts

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



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

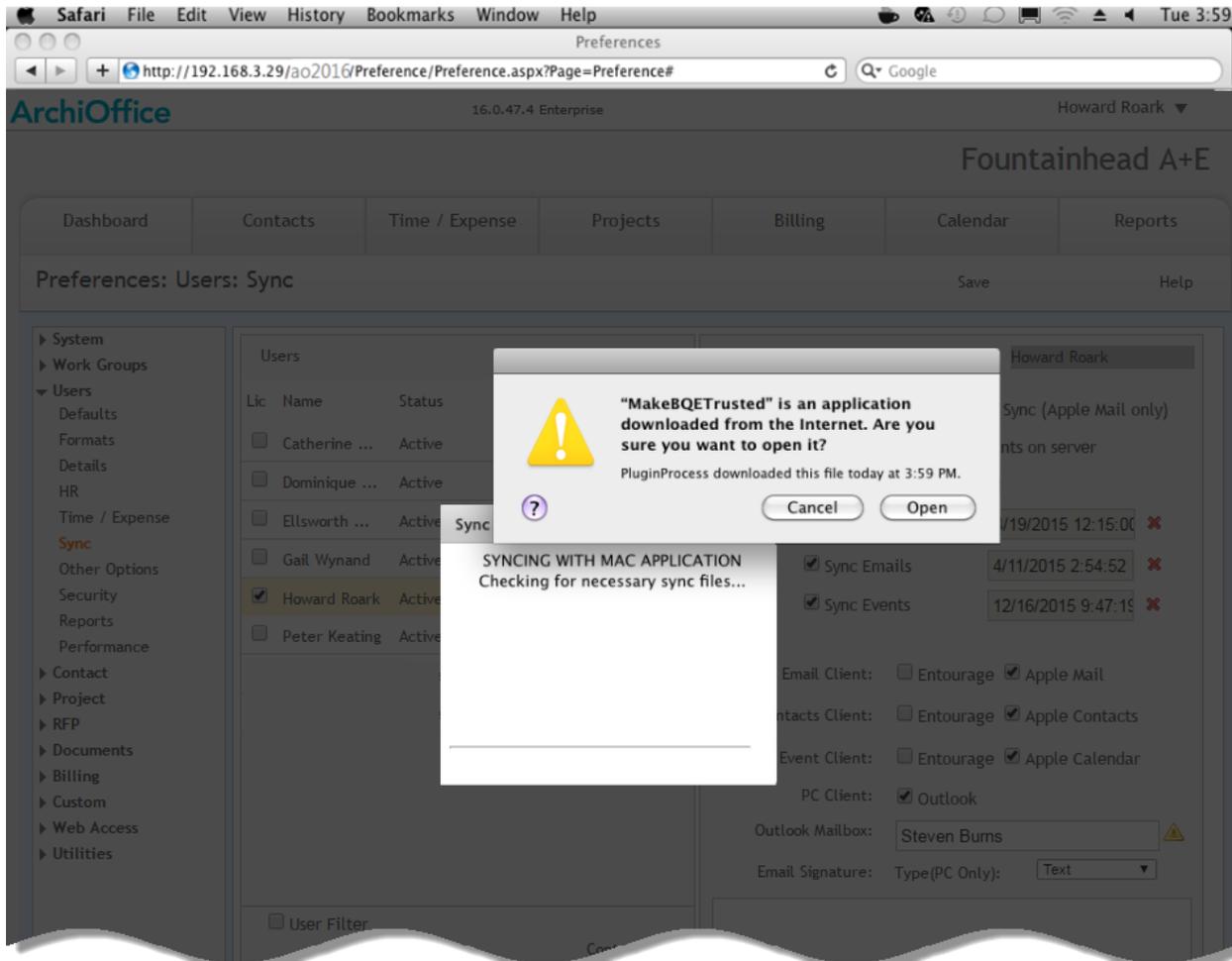


3. If you get a Java block, just click *Run this time* or *Later*, depending on the message you get.

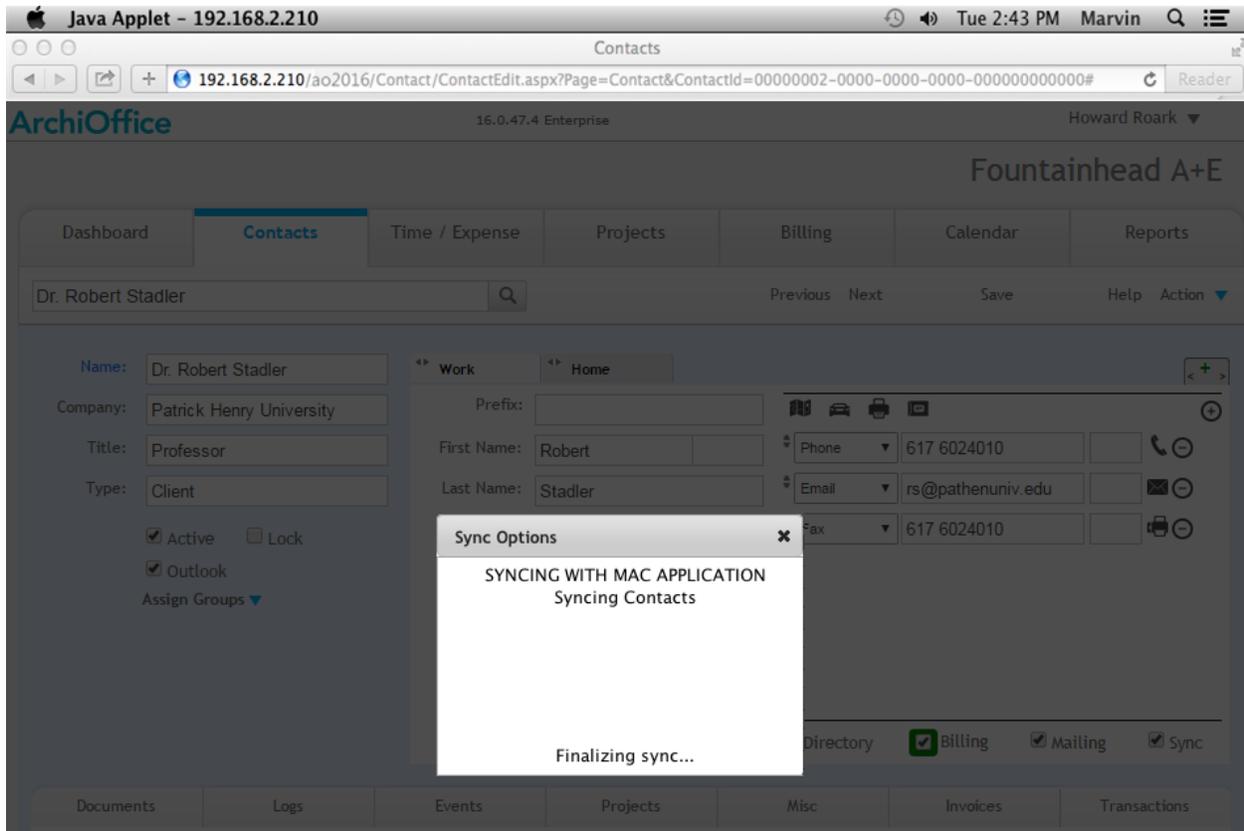


The synchronization tool requires Java and works with its current version.

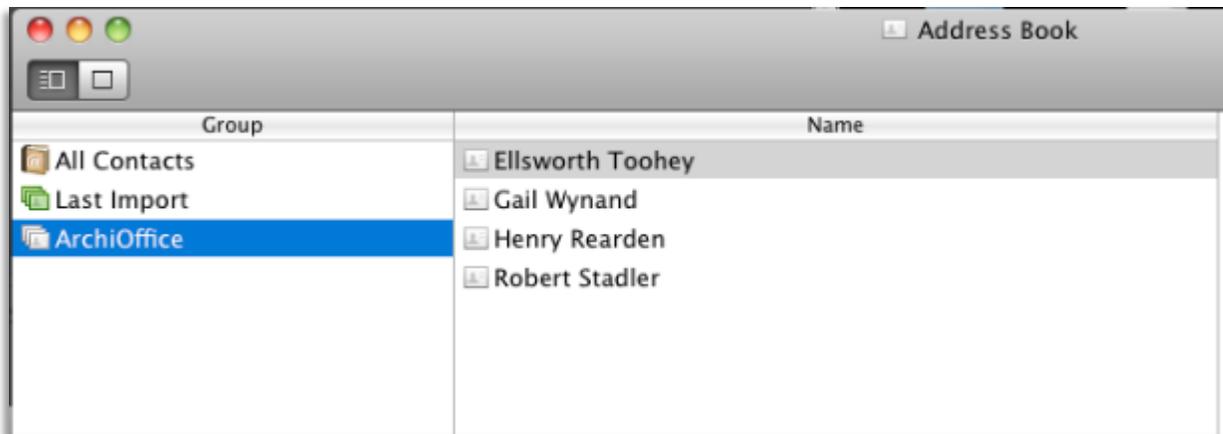
4. After the synchronization starts, you will see this screen that will show you the progress. When you see the "MakeBQETrusted" message, click Open.



The synchronization is initialized and you will see the progress.



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



Step 4: Sync Emails

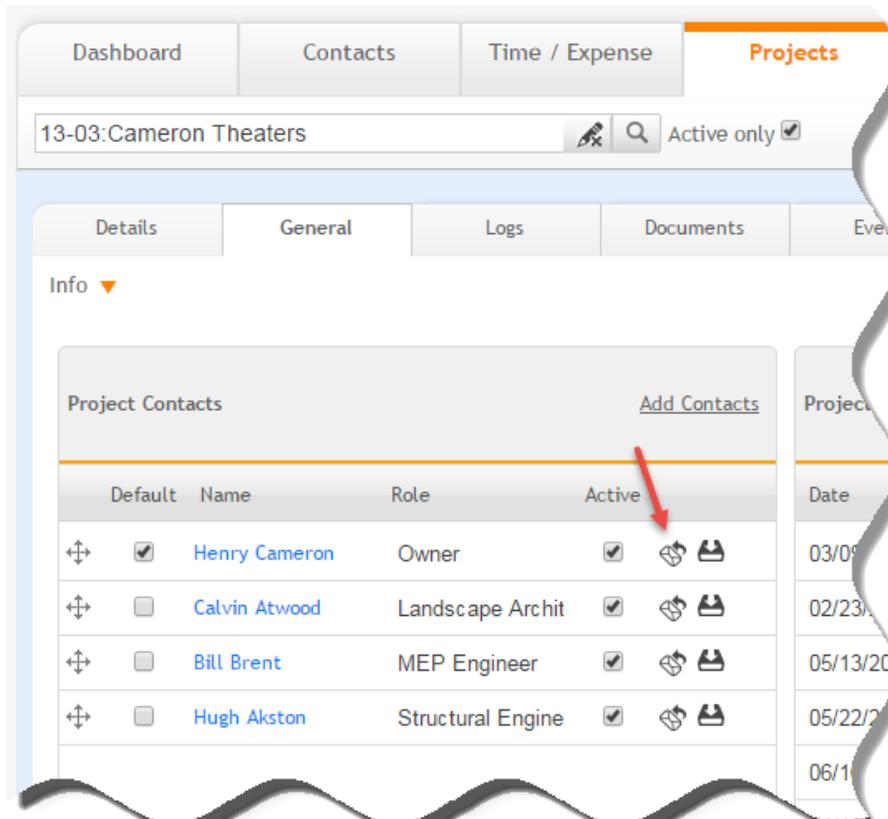
When you send an email from ArchiOffice to Apple Mail, it creates an ArchiOffice folder and a few subfolders in your email client. The ArchiOffice folder has three main subfolders:

- Project eMails
- Company eMails
- Contact eMails

If a contact is not associated with a project but has a company name in its profile, the email goes into the Company subfolder. If a contact is not associated with a project and does not have a company name in its profile, the email goes into the Contact eMails folder. When you send an email from the Project > General > Info screen, the email goes into the Project eMails subfolder.

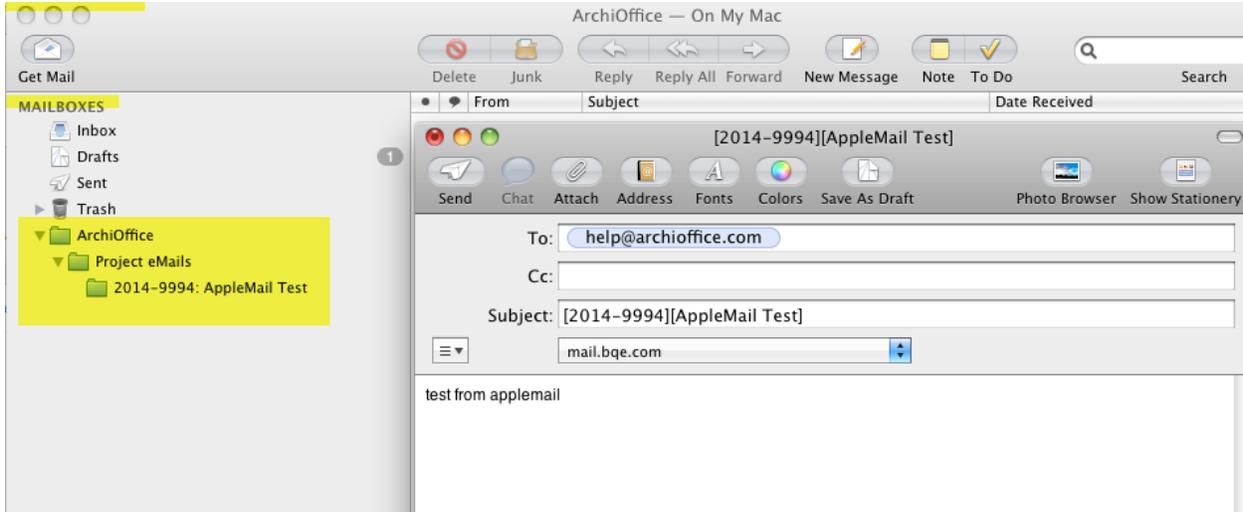
If you have checked the *Auto Archive emails on Sync* option under Preferences, it will auto archive the synced emails in the Mac email program (Apple Mail only). The sync tool will create a replica of the ArchiOffice folder (called ArchiOffice_Synced) and its subfolders, and move all the synced emails to the respective mailboxes in the cloned hierarchy. When you sync 100 or more emails, those which have already been synced will get transferred from the main ArchiOffice folder to the archived email folder and the process of syncing will start from the newly added emails rather than all the emails from the start.

1. To create Project eMails folder in Apple Mail or Entourage, 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.



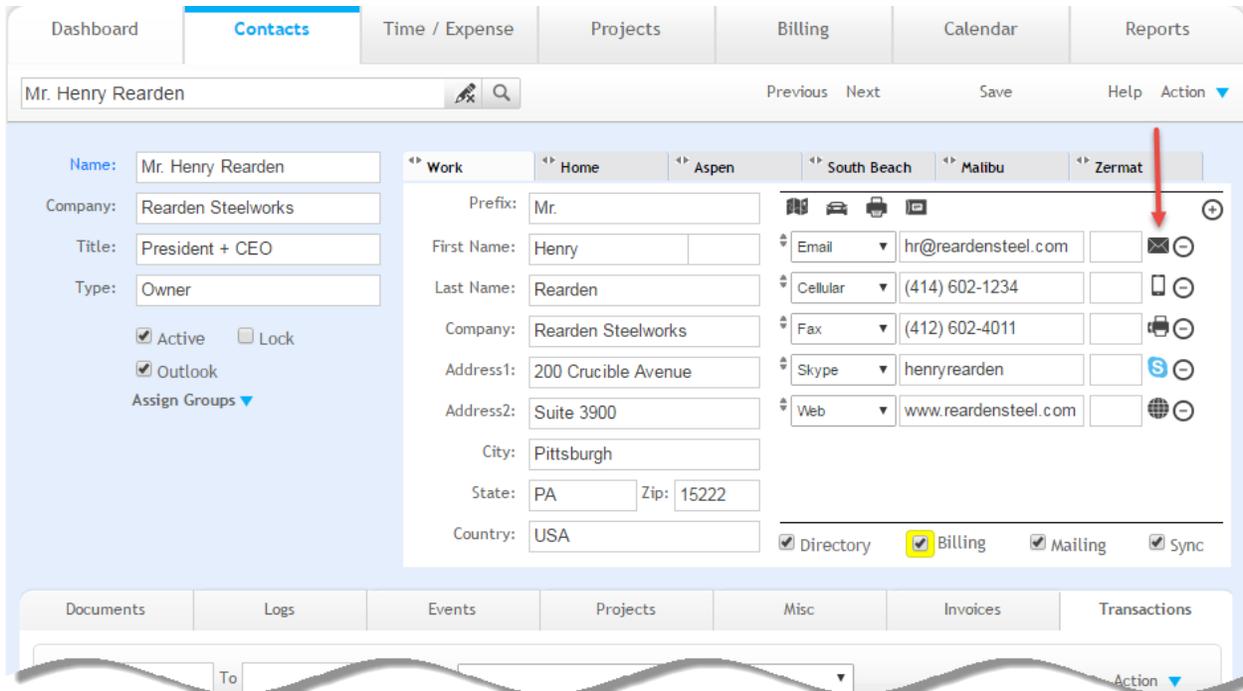
2. Check the Emails option and then click Sync. This will initiate the Project eMails folder creation

under ArchiOffice > Project eMails > [Project Number:Name] with a blank email. Delete the email and do not save the changes.



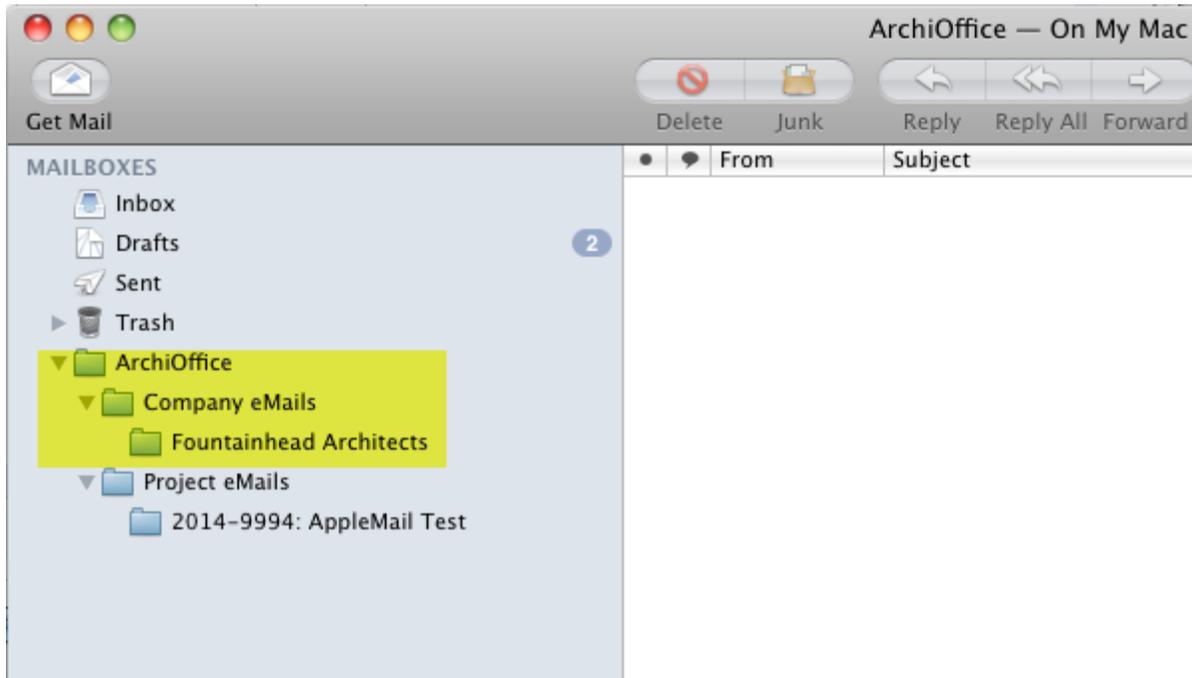
The ArchiOffice Project eMails group name is a system defined name and must NOT be renamed.

- 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.



- 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

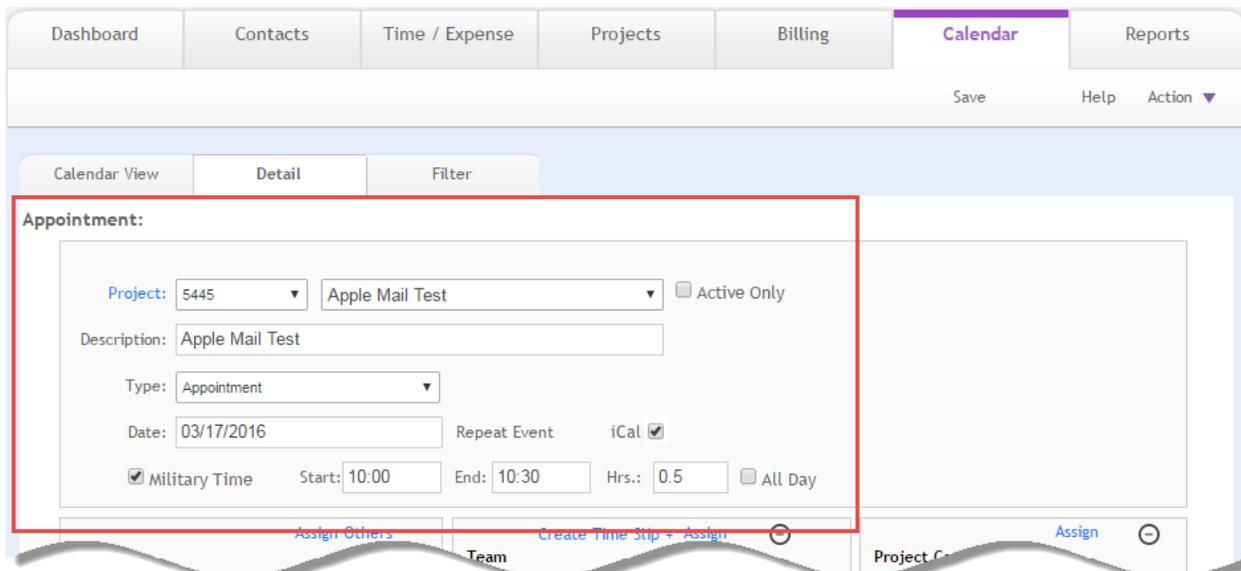
do not save changes.



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

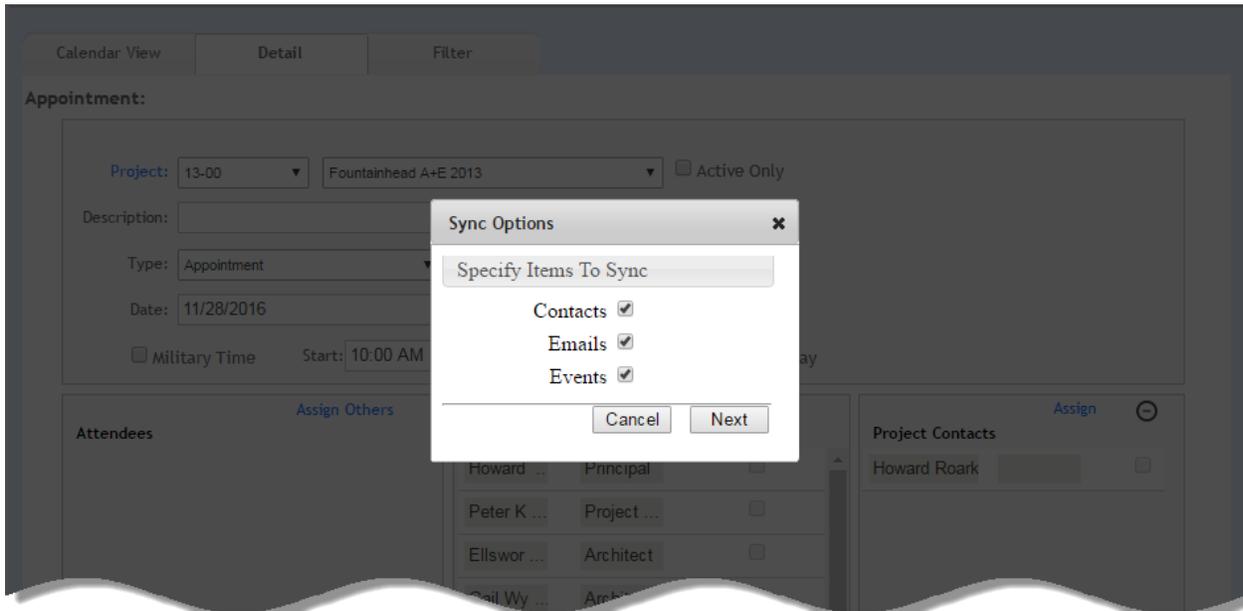
Step 5: Sync Calendar

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

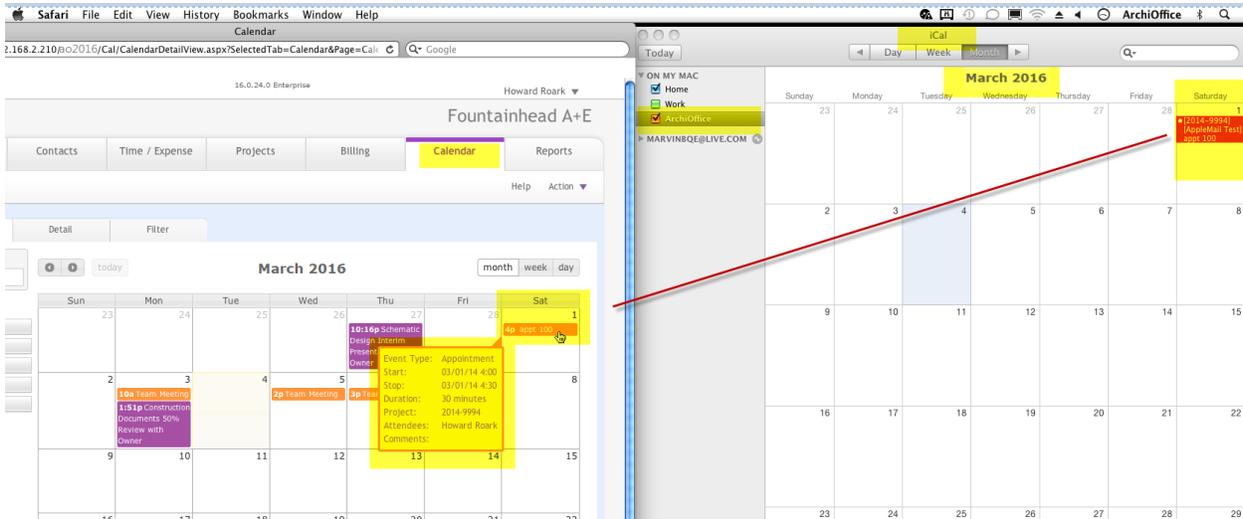


2. Then sync the calendar details by clicking the user name on the top-right of ArchiOffice desktop.

Click Sync on the drop-down list to open the Sync Options screen.



3. Check the Events option and then click Sync. When you have finished, verify the item in Apple Calendar.



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:

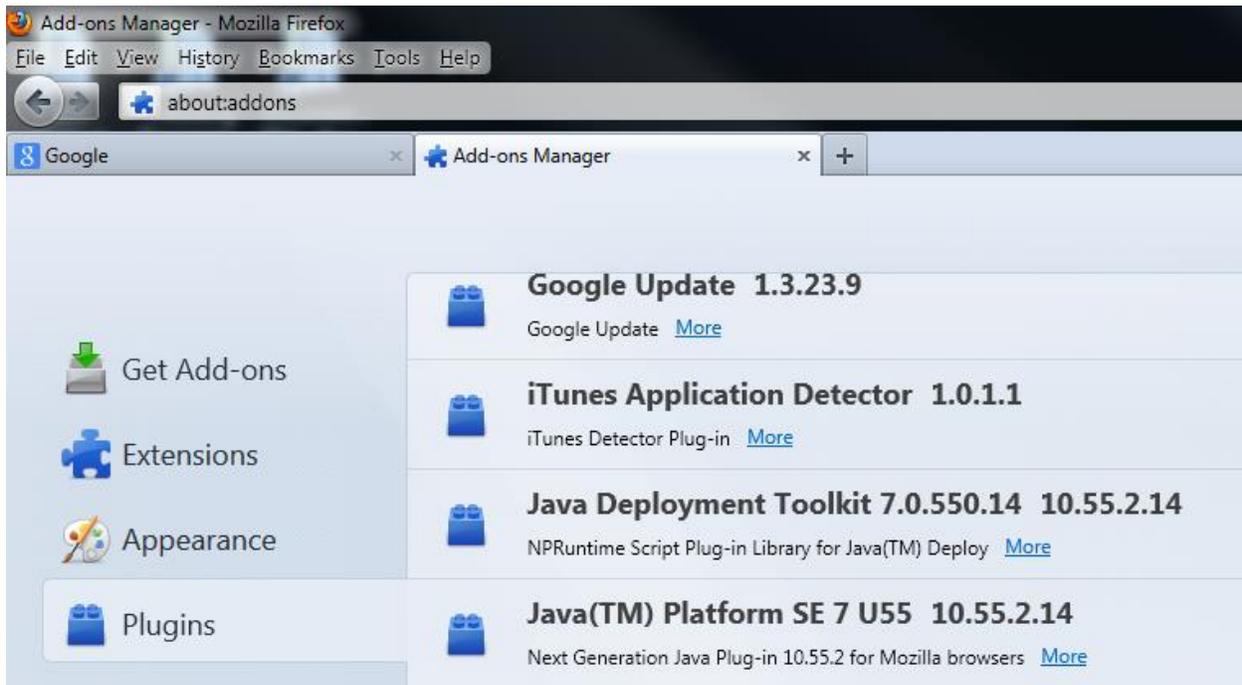


Java(TM) (2 files) - Version: 10.55.2.14
NPRuntime Script Plug-in Library for Java(TM) Deploy

[Disable](#) Always allowed

Firefox:

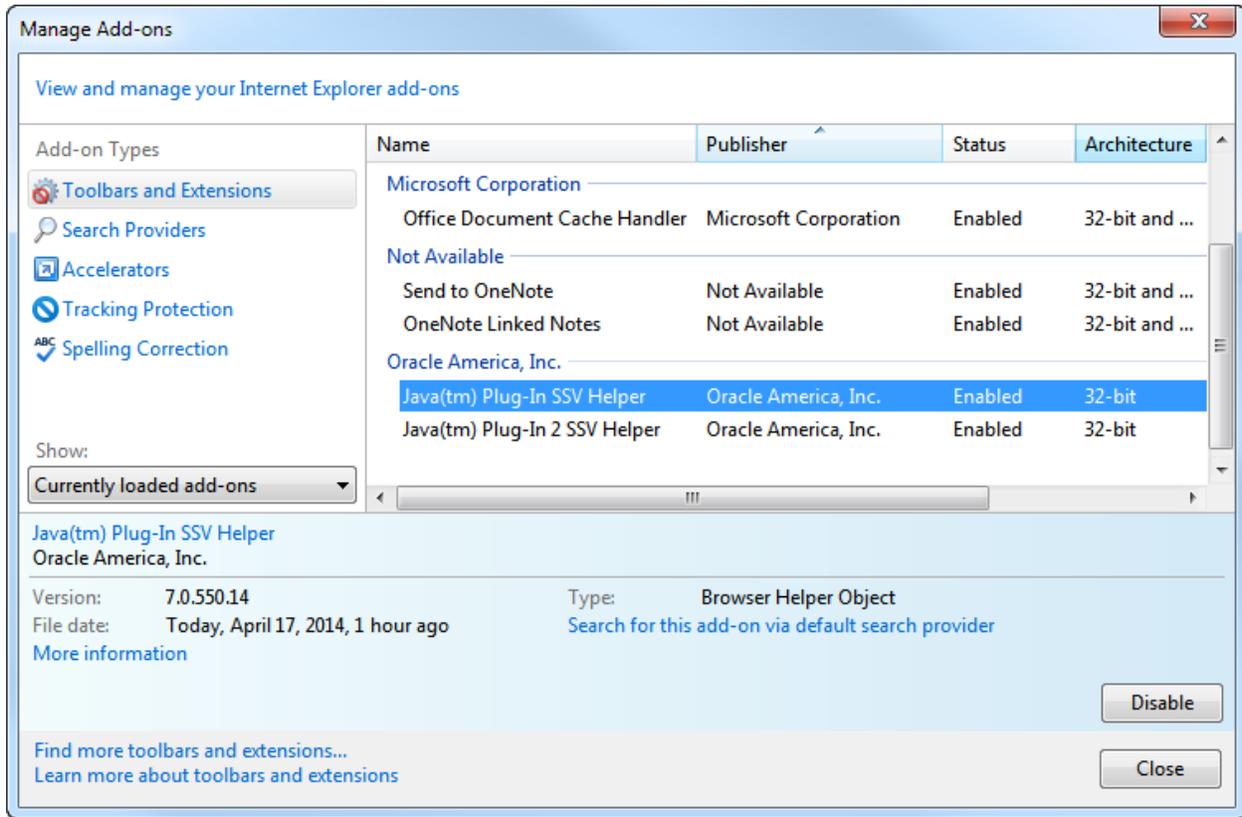
Click Ctrl+Shift+A to show plug-ins window.



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 4020.

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