3StepShare User's Guide
Version 2.0.2.0 | 06.23.2009

The quick, easy and affordable way to share Outlook

3StepShare is a Microsoft Outlook plugin that, once installed, allows users to share Outlook calendar, contact, task, and email folders with other Outlook users without the need for Microsoft's Exchange Server.

The 3StepShare plugin for sharing Microsoft Outlook does not contain a server application. Instead, it uses Microsoft Outlook's email to send, receive and synchronize data between shared Outlook folders across two or more Microsoft Outlook installations. Thus, anyone with Microsoft Outlook can use the product without having to worry about server installation, network configuration issues, and/or additional hardware requirements.

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System Requirements

3StepShare currently runs on Microsoft Windows XP and Microsoft Vista with Microsoft **Outlook 2003** or Microsoft **Outlook 2007**. It also requires Microsoft's .Net Framework version 2.0 or higher.

However, if you don't have Microsoft's .Net Framework on your computer, the 3StepShare installer will download and install it onto your computer as part of the 3StepShare installation process. You'll need to be connected to the internet for this, or the installation will stop (assuming you don't have the .Net Framework installed on your computer).

Installation

The 3StepShare plugin for sharing Microsoft Outlook calendar, contact, task and email folders is both quick and easy to install. Never-the-less, do keep in mind that the 3StepShare plugin for Microsoft Outlook must be installed on all computers wishing to share Outlook folders.
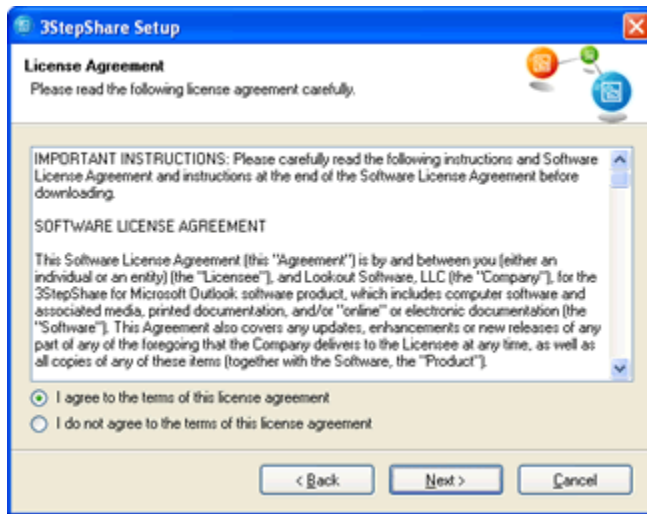
To install 3StepShare:

1. Close Microsoft Outlook if it's currently running.

2. Download and save the 3StepShare plugin to your computer's hard drive if you have not done so already. The 3StepShare plugin can be downloaded by clicking on the following link: http://3stepshare.fileburst.com/fullinstall/3StepShare.exe.

3. Double-click on the 3StepShare program installation icon that you downloaded to your computer's hard drive.
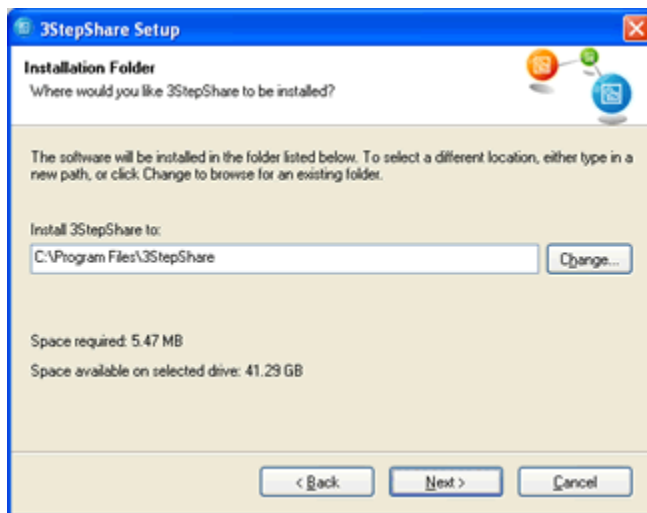

3StepShare

4. The *Welcome* panel will appear; click the **Next** button.

5. The *License Agreement* panel will appear; please read the license agreement then select **I agree to the terms of this license agreement** (if you wish to continue); and click the **Next** button.

6. The *Installation Folder* panel will appear; select a destination on your hard disk drive in which to install the 3StepShare plugin (it is highly recommend that you use the default location); and click **Next**.

7. The *Ready to Install* panel will appear; please verify the installation details listed in the panel; and click **Next**.
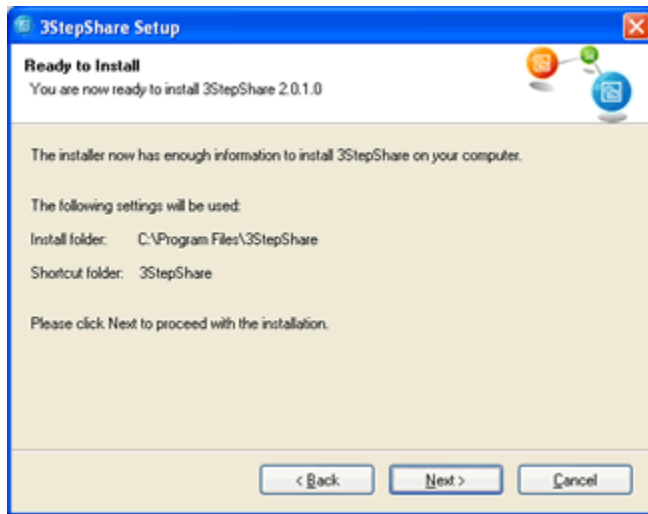
Please wait while the 3StepShare installer copies its program files to your computer's hard drive…
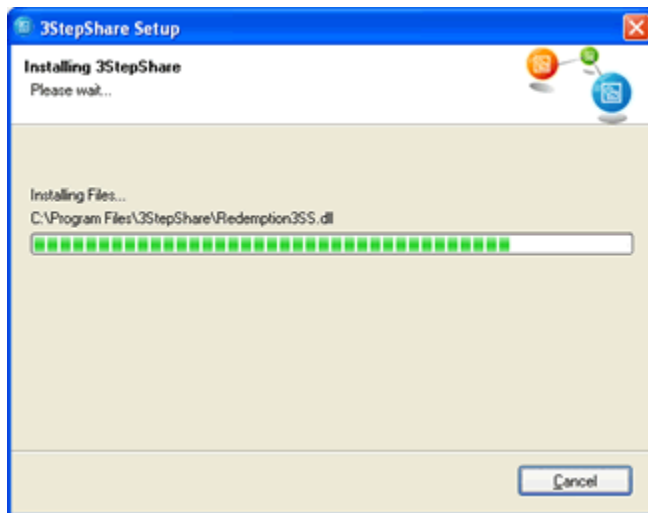
8. The *Installation Successful* panel will appear; click **Finish**.

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Getting Started with 3StepShare: Accessing the 3StepShare QuickStart Guide

Once you have completed your 3StepShare installation you'll notice that a copy of the *3StepShare QuickStart* guide is placed on your computer's Desktop in Adobe Acrobat format.

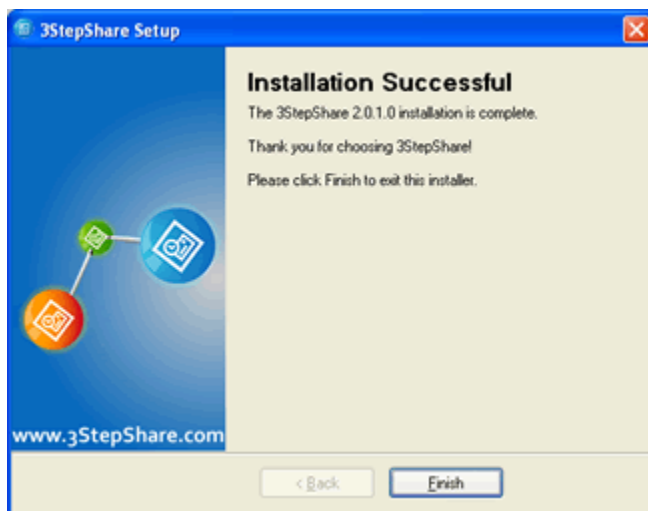You'll also notice that an extra copy of the *3StepShare QuickStart* guide is placed in your Microsoft Outlook *Inbox* in email format. Our primary objective in providing you with two copies is that in the event you are unable to open the *QuickStart* guide in the PDF format, another version is available to you.

For most users, the *3StepShare QuickStart* guide provides all the instruction that is needed in order to use and manage the sharing Microsoft Outlook calendar, contact, task and email folders with 3StepShare. If you are unable to locate the *3StepShare QuickStart* guide on your desktop or in your Outlook *Inbox* you can download it from the 3StepShare website at
http://3stepshare.fileburst.com/documents/quickstart.pdf.

Sharing a specified Outlook calendar, contact, task or email folder

Creating a shared Outlook calendar, contact, task or email folder with another Outlook user is simple with 3StepShare Outlook plugin.

To share a Outlook calendar, contact, task or email folder with the 3StepShare plugin:

1. Open Microsoft Outlook if it's not open already.

2. Select an Outlook folder you wish to share, and click the **Share folder** icon on your 3Step Share Outlook toolbar.

    For example, if you wish to share your Outlook calendar folder, click on your Calendar folder within the Outlook folder list, and then click on the **Share folder** icon in your 3Step Share Outlook toolbar (*illustrated below*).
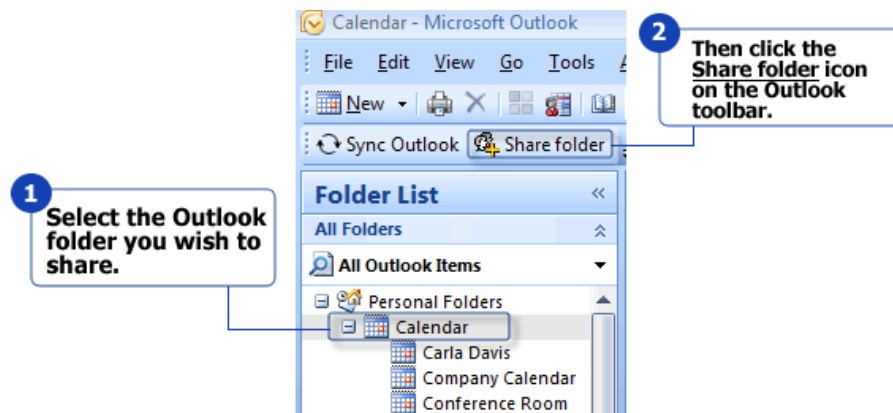
3. From the *Add Share* dialog box, type in the name of the person you wish to share the selected folder with inside the **Full Name** text box; then type in the email address of the person you wish to share the selected folder with inside the **E-mail** text box; then select the access rights you wish to grant to the person you are sharing the selected folder with using the corresponding check boxes for **Write Access** and **Delete Access**; and click **Save**.
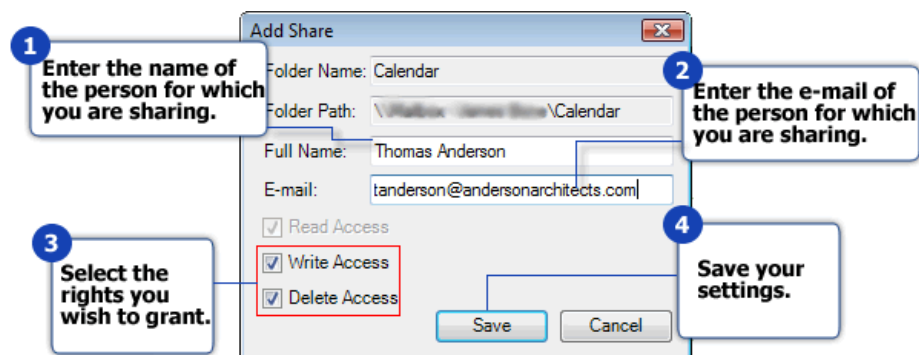

What happens just after you create a share?

Once you've initially created a share for an Outlook folder, 3StepShare sends a specially coded email invitation to the person at the email address you specified in *Add Share* dialog box (above) (see the topic: *Receiving an invitation to share an Outlook folder* to learn more about the shared folder invitation). This person will then have to accept the invitation before the folder is synced between your Outlook installation and the Outlook installation of the person in which you invited.

3StepShare logs the share in the *My Shares* tab of the *3StepShare Configuration* dialog box and marks it as "Pending" until a confirmation of acceptance is received back from the person you invited. Once the confirmation of acceptance is received, the status of the share will be updated to "Active" and 3StepShare will begin send and receive regular updates of the shared folder between you and the user you are sharing the folder with each time Outlook sends/receives email. (See the

topic: *3StepShare Configuration* to learn more about the 3StepShare Configuration dialog box).
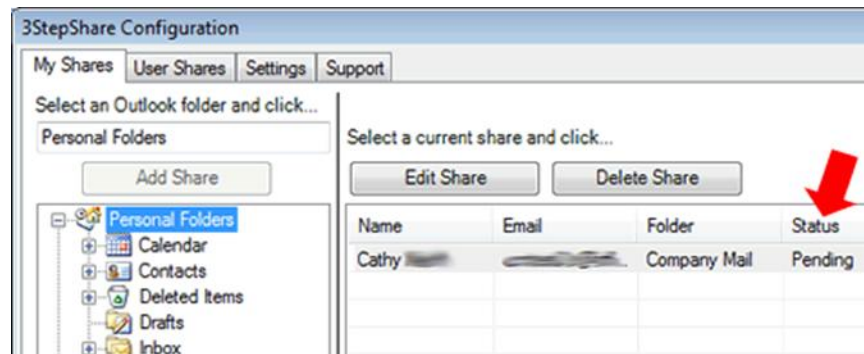
About Outlook Sensitivity Settings (Private, Personal, Confidential)

For additional security, 3StepShare will not sync any items of the shared folder if the items are flagged with the following Microsoft Outlook sensitivity settings: **Private**, **Personal**, and/or **Confidential**. These sensitivity settings apply to Microsoft Outlook Calendar, Contact, Task, Email items.

Receiving an invitation to share an Outlook folder

When an Outlook user shares an Outlook calendar, contact, task or email folder with another user via 3StepShare; the user in which you specified to share the folder with will first receive an invitation to share the selected folder, and then must accept the invitation and tell 3Stepshare where they would like the shared folder will be stored within their Microsoft Outlook folder structure.

Accepting an invitation to share a Microsoft Outlook folder

1. To accept an invitation to share an Outlook folder, after carefully reviewing the name and email address of the inviter, click the **Accept** button.
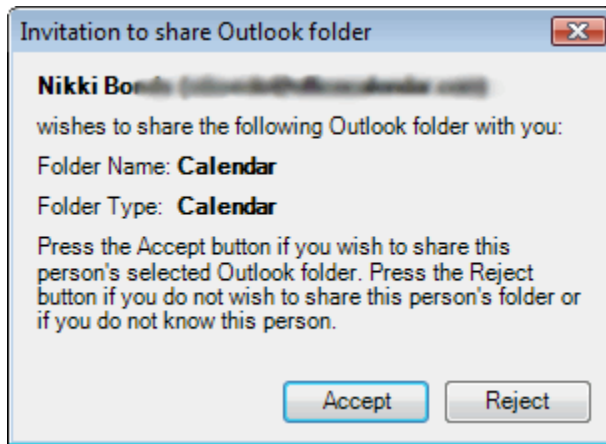
2. Next, from the *Create New Folder* dialog box, select the default location and name for the shared folder **or** create a custom name and location for the shared folder; and click **OK**.

The name you wish to have for the shared folder.

The location for which you wish to have the shared folder stored. In this example, it will be stored as a sub-folder under the Calendar folder with the name "Conference Room".
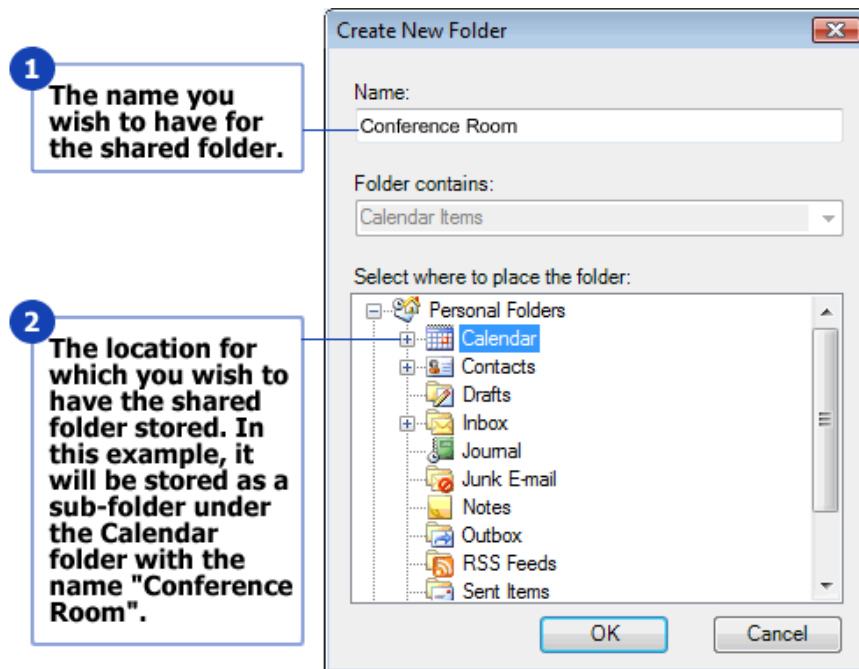
The *Shared Folder Successfully Added* dialog will appear; please read it to understand what will happen next…
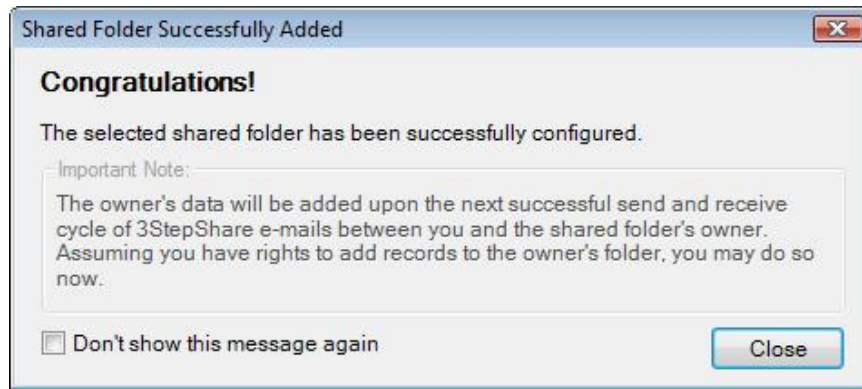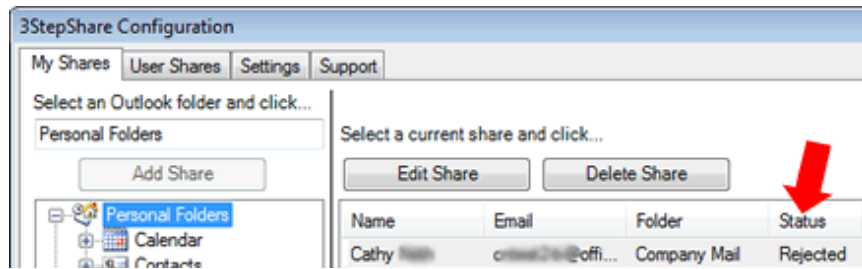
Rejecting an invitation to share an Outlook folder

If you receive an invitation to share an Outlook calendar, contact, task or email folder, be sure to verify the information (Name and Email Address of the Inviter) in the invitation before accepting. If you do not know or recognize the person inviting you to share an Outlook folder then simply click the **Reject** button in the *Invitation to share Outlook folder* dialog box.
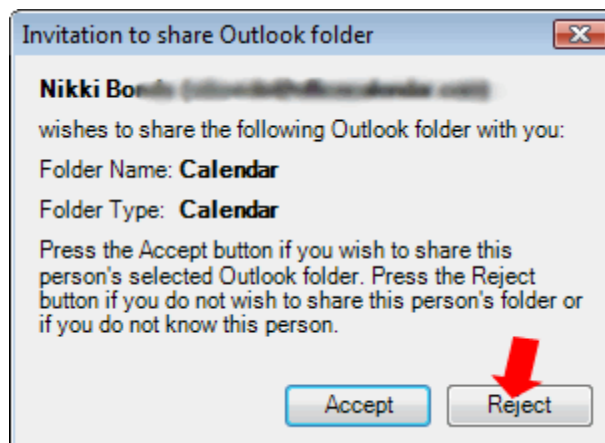
**How do you know if an invitation to share an Outlook folder has been rejected?**

If an invitation to share an Outlook folder has been rejected, the status of the share is updated in either *My Shares* or *User Shares* tab within the *3StepShare Configuration* dialog box.

You can later delete the share and re-invite the same user at any time and as often as you wish.

Sharing Outlook folders via email synchronization

Once an invitation to share an Outlook calendar, contact, task or email folder has been accepted; the status of the share is then updated in the *3StepShare Configuration* dialog box to "Active" in either the *My Shares* tab and/or *User Shares* tab of the *3StepShare Configuration* dialog box.
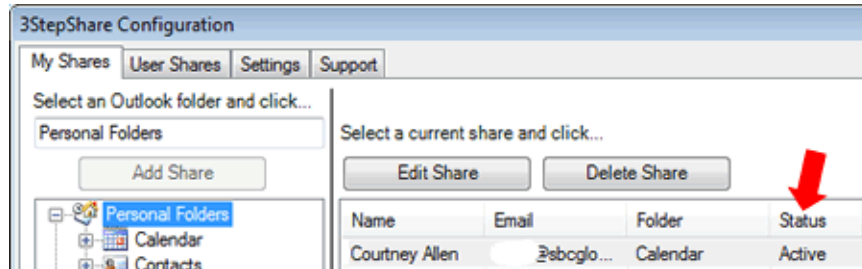
The "Active" status then tells 3StepShare to begin the processing of sharing and synchronizing the shared Outlook folder's data via email, all of which happens behind the scenes without any user intervention (by default). However, you can you can see when processing is taking place as the state of the Sync Outlook icon on the 3Step Share Outlook toolbar changes (*globe with arrows: see example below*) while it is processing shared Outlook calendar, contact, task and email folder data for synchronization.
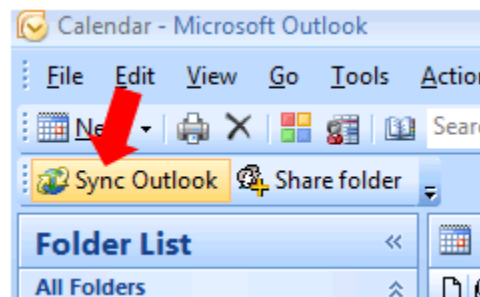
The processing times for the very first synchronization of a share takes the longest since it gathers all data in the shared folder for processing, and sends it to the person for which you are sharing the data. The time of the synchronization depends on the Outlook folder type you are sharing, and how much data

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is contained within the folder. Calendar and Tasks data is much smaller than Contact and Email data (particularly where email folders contain attachments).

After the first synchronization, however, 3StepShare only processes changes that have occurred between the shared folders since the last synchronization, and thus subsequent shared folder synchronization processing times are much quicker. Again, however, if you are sharing Email with large attachments this may not be the case.

For most users, Outlook's performance will not be effected as the algorithm for gathering data for synchronization has been designed to be efficient, being mindful the speed at which the processing occurs, while keeping plenty of system resources available for Outlook to continue working as normal while the processing is taking place.

3StepShare Configuration

The *3StepShare Configuration* dialog contains configuration data about shared folders and various settings for how 3StepShare processes shared Outlook folder data. From the *3StepShare Configuration* dialog box you can:

- ✓ View the Microsoft Outlook folders you are sharing with other Microsoft Outlook users (referred to as *My Shares*).
- ✓ View the Microsoft Outlook folders others users are sharing with you (referred to as *User Shares*).
- ✓ Edit and/or delete shares.
- ✓ Modify or change 3StepShare data synchronization settings.

To open the *3StepShare Configuration* dialog:

1. Open Microsoft Outlook if it is not already open.

2. Click on the *3StepShare* menu; and select **Configure**.

My Shares tab

The *My Shares* tab is the first tab you'll see when opening the *3StepShare Configuration* dialog, and this tab contains data about the Microsoft Outlook folders in which you share with other users. The *My Shares* tab also contains several functions that allow you create new shared Outlook folders as well as functions that allow you edit the properties of your existing shared Outlook folders.
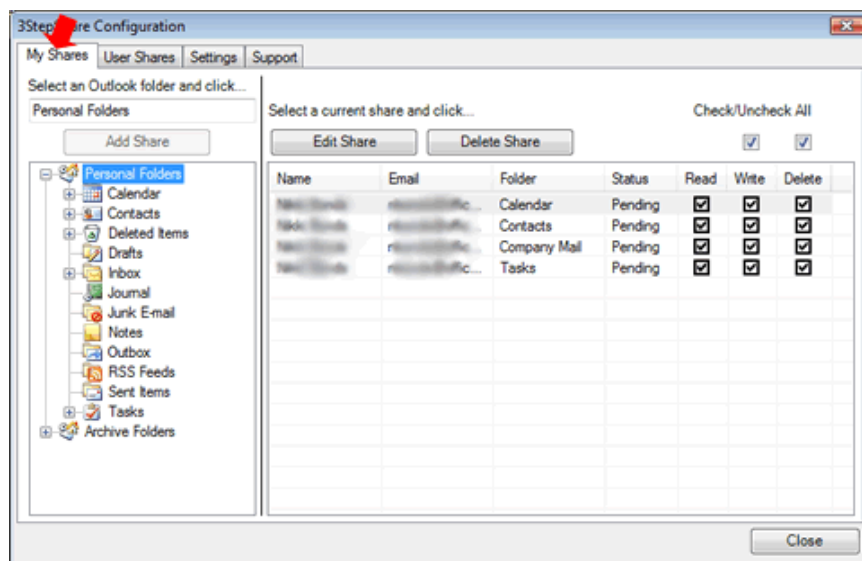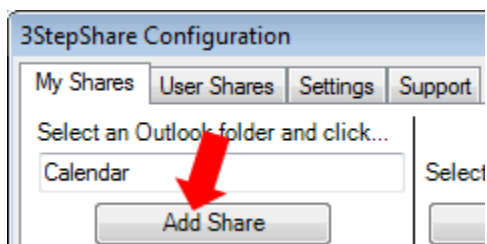

Sharing Outlook calendar, contact, task and email folders from the My Shares tab

To share an Outlook calendar, contact, task or email folder from *My Shares* tab:
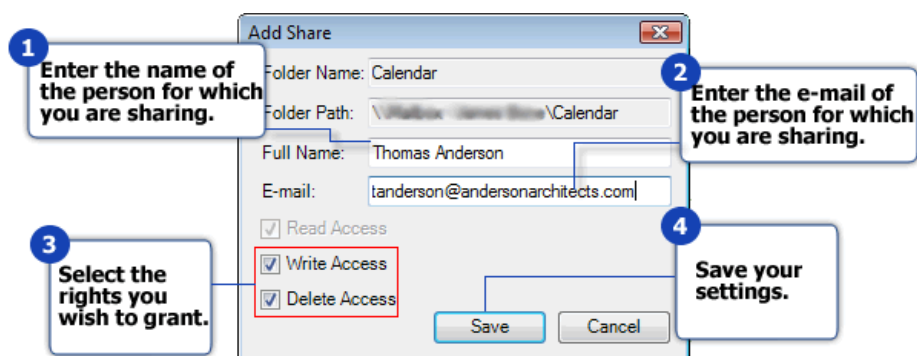
1. From the *My Shares* tab; select the Outlook folder you wish to share from the Outlook folder list on the left.

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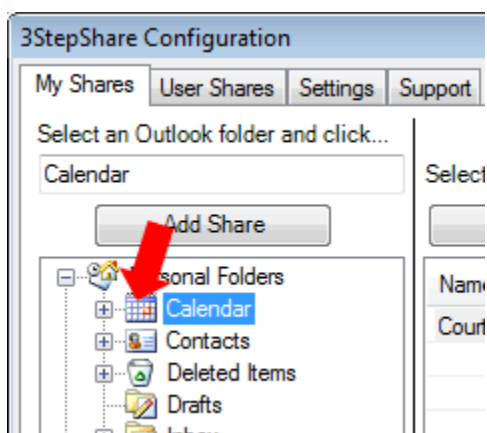
2. Next, click the **Add Share** button above the displayed Outlook folder list.


3. From the *Add Share* dialog box, type in the name of the person you wish to share the selected folder with inside the **Full Name** text box; then type in the email address of the person you wish to share the selected folder with inside the **E-mail** text box; then select the access rights you wish to grant to the person you are sharing the selected folder with using the corresponding check boxes for **Write Access** and **Delete Access**; and click **Save**.

Editing one or more of your Outlook shares

To edit one or more of your Outlook shares:

1. Open Microsoft Outlook if it is not already open.

2. Click on the 3StepShare menu; and select **Configure**.

3. From the *My Shares* tab, select a share from the list of **current shares** list; and click the **Edit Share** button.

4. From the *Edit Share* dialog box, change the **Full Name** of the person you are sharing folder data with and/or the person's access right you wish to grant; and click **Save**.
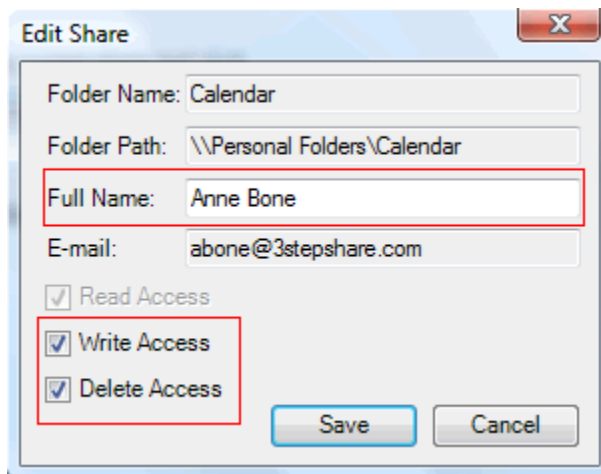
Deleting one or more of your Outlook shares

To delete one of your existing Outlook shares:

1. Highlight the user share you wish to delete; and click the **Delete Share** button.

2. Follow any further on-screen prompts.

User Shares Tab

The *User Shares* tab allows you to view and/or delete the sharing of Microsoft Outlook folders others users are currently sharing with you (referred to as *User Shares*).

Viewing User Shares

To view your current User Shares:

1. Open Microsoft Outlook if it is not already open.

2. Click on the *3StepShare* menu; and select **Configure**.

3. Next; click on the *User Shares* tab.
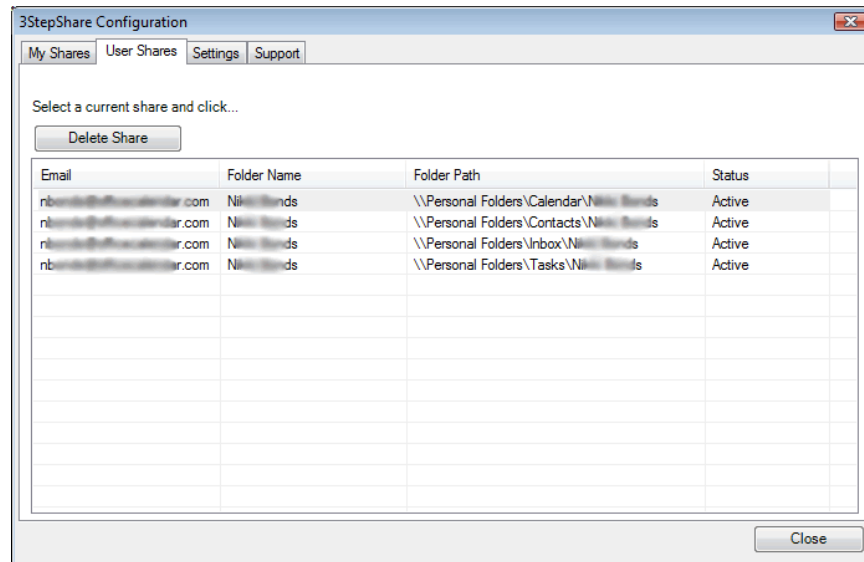
Deleting a User Share

To delete a User Share:
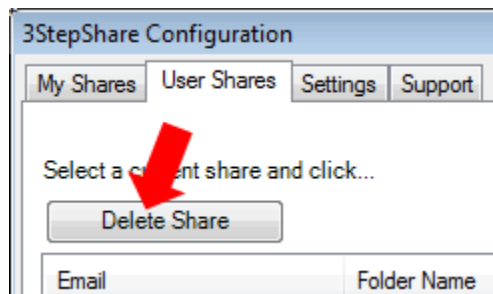
1. Open Microsoft Outlook if it is not already open.

2. Click on the *3StepShare* menu; and select **Configure**.

3. Click on the *User Shares* tab.

4. Highlight the User Share you wish to delete; and click on the **Delete Share** button.

5. Follow any further on-screen prompts.

Settings Tab

The *3StepShare Configuration* dialog's *Settings* tab contains the following settings:

- Language

- Send Updates
- Ignore reminders
- Opt-out of trial emails
- Maximum size of synchronization email
- Enable process stuck emails

To access the *Settings* tab from the *3StepShare Configuration* dialog box:

1. Open Microsoft Outlook if it is not already open.

2. Click on the *3StepShare* menu; and select **Configure**.

3. Click on the *Settings* tab.
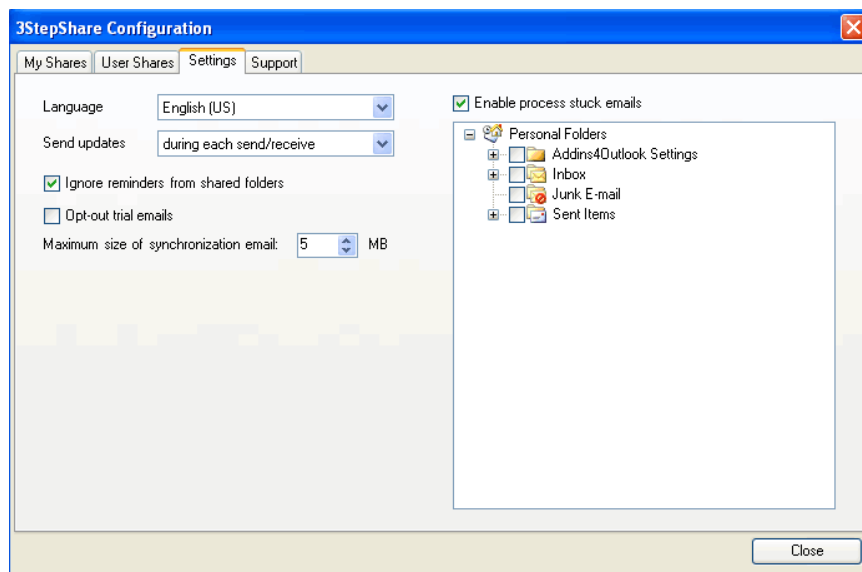

Change the language of 3StepShare

3StepShare version 2 has been designed to support multiple languages. However, at this time, the only language pack available for 3StepShare is English.

3StepShare engineers have exposed all text elements of 3StepShare in an external XML file format, which can be easily translated to other languages simply by re-typing its text from English to another language. This can be easily accomplished by using common text editors that support XML format like Microsoft Word.

If you wish to translate 3StepShare to another language and have the language pack included within 3StepShare please contact us at partners@3StepShare.com.

Turn Off/On automatic updates

By default, 3StepShare is set to send, receive, and process updates for shared Outlook calendar, contact, task and email folders each time you send and receive email from Microsoft Outlook. You can, however, turn off this automated update function and set 3StepShare to only send, receive, and process updates only when you click on the *Sync Outlook* button on the Microsoft Outlook toolbar.
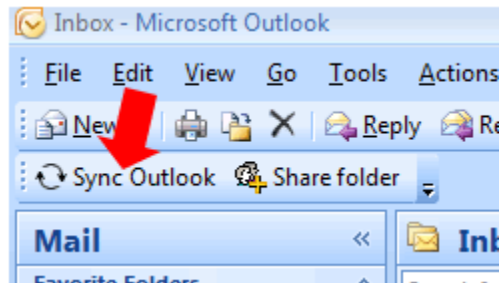
To turn off automated synchronization of shared Outlook folder updates:

1. Open Microsoft Outlook if it is not already open.

2. Click on the *3StepShare* menu; and select **Configure**.

3. Click on the *Settings* tab.

4. Click on the *Send Updates* dropdown option; and select **only when I click on "Sync" button**.
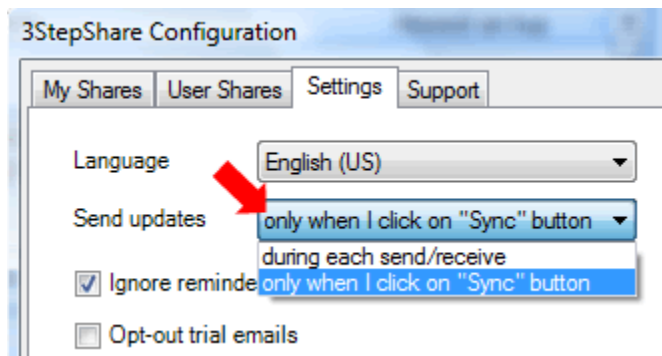
Synchronize reminders in shared Outlook calendar, contact, task and email folders

By default, reminders from shared folders (User Shares) are ignored. However, 3StepShare contains an option that will allow you to turn on the synchronization of reminders in your shared Outlook calendar, contact, task, and email folders (User Shares).

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To synchronize reminders in shared Outlook calendar, contact task and email folders:

1. Open Microsoft Outlook if it is not already open.

2. Click on the *3StepShare* menu; and select **Configure**.

3. Click on the *Settings* tab.

4. Uncheck the option **Ignore reminders from shared folders**.
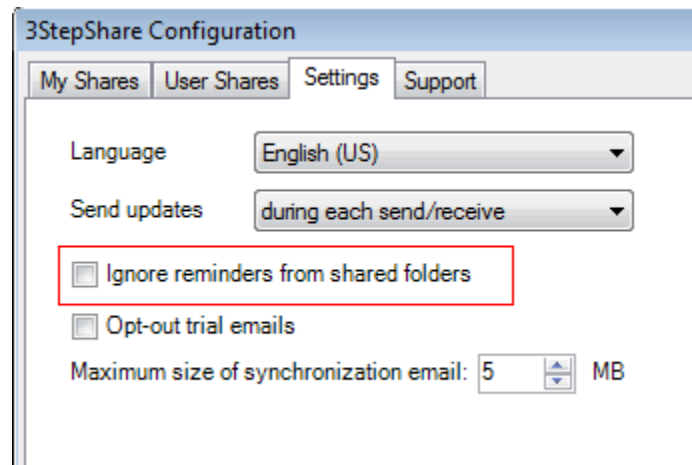
Opting-out of trial period emails

Throughout the 3StepShare 14-day trial period, several emails are placed in your Microsoft Outlook Inbox to help you get the most out of sharing Outlook calendar, contact, task and email folders with the 3StepShare Outlook plugin. These emails will cease once the 3StepShare trial period has ended; when 3StepShare has been licensed; or when 3StepShare has been uninstalled.

To opt-out of these trial period emails:

1. Open Microsoft Outlook if it is not already open.

2. Click on the 3StepShare menu; and select **Configure**.

3. Click on the *Settings* tab.

4. Check the option **Opt-out trial emails**.

Change the maximum size of synchronization emails

3StepShare gathers data from shared Outlook calendar, contact, task and email folders; and attaches the data to

specially encoded emails for processing between two or more Outlook installations.

By default, 3StepShare will splits this data up into multiple emails so that it will not send any emails that contain an attachment larger than 5MB. This done because many email account providers limit the size of attachments that can be sent or received; and 5MB appears to be the average size limitation. Never-the-less, 5MB is a general average, and some providers will allow larger attachments while others have more stringent size limitations.

If you experience an issue with sending and/or receiving 3StepShare synchronization emails to limitations of your emails provider with regards to attachment size; or a user you are sharing an Outlook calendar, contact task or email folder with is unable to receive your shared folder synchronization data; you can reduce the size of attachments 3StepShare will use to send synchronization data.

If you do not experience any issues with emails file size limitation; it is highly recommended that you leave the setting at its default unless instructed to change it by the 3StepShare support team.

To change the maximum size of synchronization emails:

1. Open Microsoft Outlook if it is not already open.

2. Click on the 3StepShare menu; and select **Configure**.

3. Click on the *Settings* tab.

4. Set the maximum size of synchronization email attachments using the *Maximum size of synchronization email* toggle box.
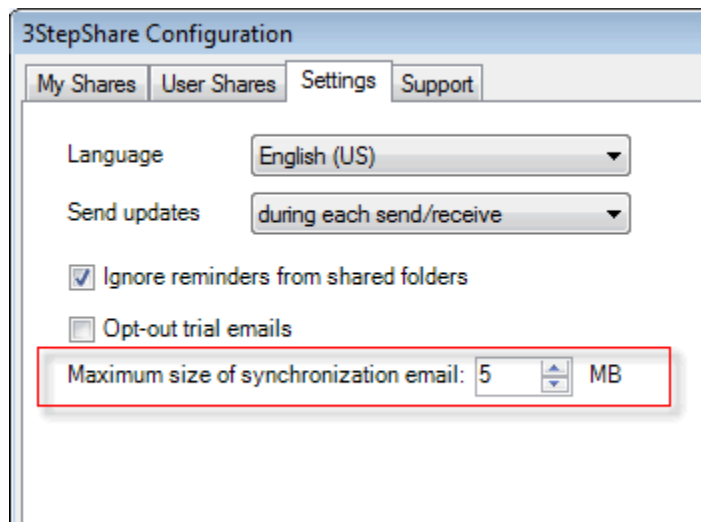
Enable process stuck emails

3StepShare uses special emails with attachments to publish and broadcast data from shared Outlook folders (data modifications). These emails are referred to as "3StepShare auxiliary emails", which is also the subject of these emails. 3StepShare scans your Inbox or a selected mail folder after each send and receive, and if it finds these emails, it processes them and then removes them from the selected folder.

Anti-spam and/or junk e-mail software may:

1. Reformat these emails when sending and/or receiving these emails.

And/or

2. Automatically place these emails into a folder other than your Outlook Inbox (the default folder in which 3StepShare is looking for these emails so that it may process them) when receiving these emails.

If this happens, shared folder updates may be interrupted. If one of the scenarios above happens, the Enable process stuck emails option allows 3StepShare to:

a. Process the 3StepShare auxiliary emails that have become stuck (or orphaned) in a specified email folder (example: **Junk E-mail**).
b. Process future 3StepShare auxiliary emails that are moved to another folder as a process of your Outlook Send/Receive Rules. In other words, you can setup a rule that tells Outlook to automatically place 3StepShare auxiliary emails into a specified folder when they are received…and here, in the folder selection

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(under Process stuck emails) you can specify which folder/s you want 3StepShare look in when processing the 3StepShare auxiliary email for updating shared folders.
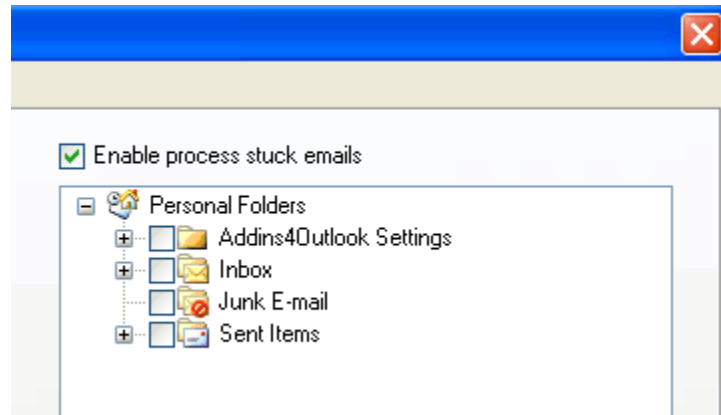
Support Tab

The 3StepShare Configuration's *Support tab* provides access to support and diagnostic tools. It is recommended that you access these functions <u>only</u> upon the instruction of the3StepShare support team.
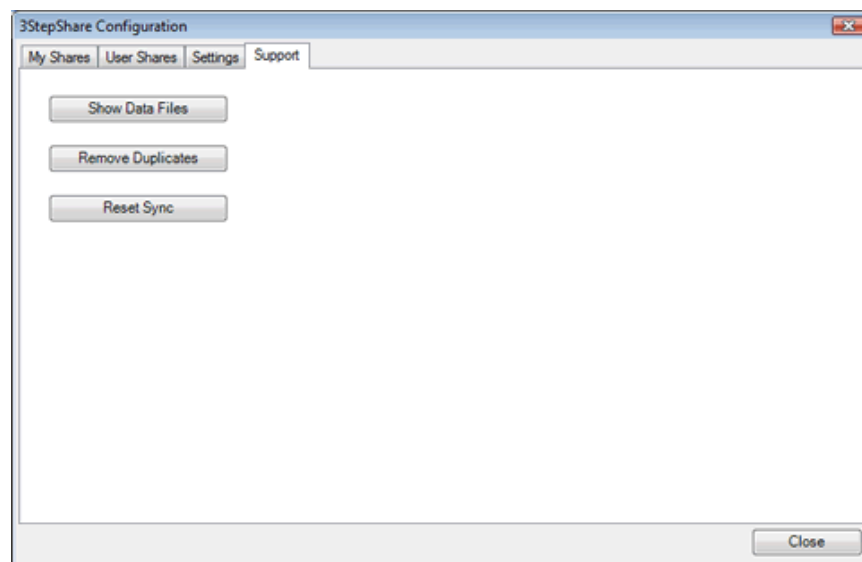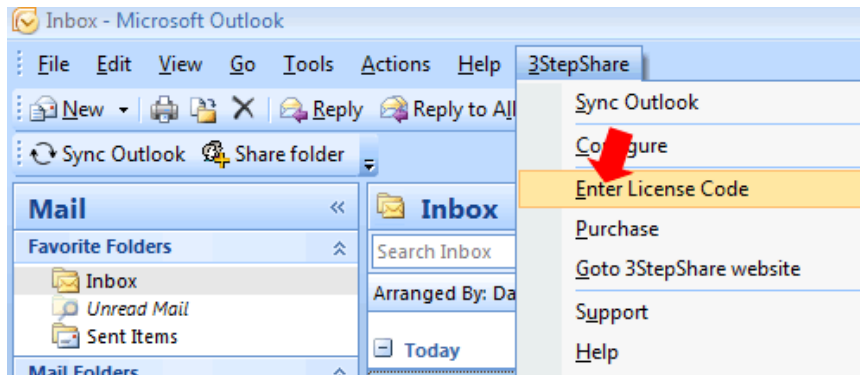

Licensing and Activating 3StepShare

Once you have purchased a license for 3StepShare, you will receive a License Code that allows you permanently activate it.

To permanently activate your copy of 3StepShare:

1. Open Microsoft Outlook if it is not already open.

2. Click on the *3StepShare* menu; and select **Enter License Code**.

3. From the *3StepShare License Code* dialog box enter the license code you receive after purchasing 3StepShare into the *License Code* box; and click **Save**.
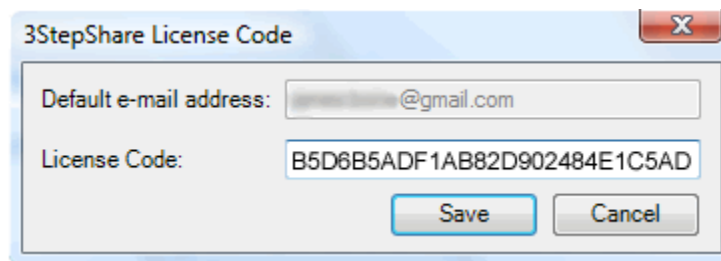
Uninstalling 3StepShare

1. Close Microsoft Outlook if it is currently open.

2. From the Windows *Start* menu; open the Windows *Control Panel*.

3. From the Windows *Control* Panel select **Uninstall a Program**.

4. Select 3StepShare from the Program List; click **Uninstall**; and follow the on-screen prompts.