



Office 365 Public Folder QuickStart Guide

Cira Apps Ltd.

About This Publication

This QuickStart Guide provides how-to instructions for creating and sharing Public Folder contact lists, calendars, and notes, and makes the case why employees need contacts, calendars, and notes synced to business smartphones.



Table of Contents

- 04** Why Employees Love Public Folders
- 06** Create and Share Public Folder Contact Lists with Outlook Desktop
- 10** Create and Share Public Folder Calendars with Outlook Desktop
- 13** Create and Share Public Folder Notes with Outlook Desktop
- 16** Create and Share Public Folders with Office 365
- 18** Set up Azure Directory Premium and Create Office 365 Dynamic Distribution Groups
- 22** Sync Public Folder Contacts, Calendars, and Notes to Business Smartphones



Why Employees Love Public Folders

Public Folders have been around forever. In fact, if they were a person, they'd be old enough to drink, and anyone who has tried to clean up or re-vamp a legacy folder would tell you, you could use a stiff one by the time you're done.

Despite the headache, years of changes, and attempts to remove them by Microsoft, Public Folders are here to stay.

This raises an obvious question, if this somewhat antiquated, unwieldy, and cumbersome product is such a pain—why do employees love them so much?

Public Folders Provide Valuable Functionality as a Group Hub

Public Folders act as a group hub for teams or departments at a company and can serve many functions:

- Store individual contact information—email addresses, phone numbers, photos—that can be accessed by anyone with the correct permissions.
- Host a central calendar that anyone can view and update.
- Hold email items for shared access or archive email for a group.
- Store and share notes, announcements, task lists, and files.

Given the ease-of-use and the functionality as a group hub, small work groups or individuals looking to collaborate frequently turn to Public Folders to share information that needs to be viewed, updated, and accessed freely.

Ease-of-Use of Public Folders

A key reason that Public Folders are used so often is that any Exchange Server or Office 365 user can create a Public Folder and grant access to other users. It is very simple to use Public Folders through the Outlook client: the user can drag and drop files and can easily navigate them. It doesn't require IT support to set up, operate, or manage.

Anyone with an Outlook mailbox can be authorized to view, edit, or manage Public Folders. However, that strength is also a weakness of Public Folders. In many companies, Public Folders have multiplied to tens of thousands holding multiple terabytes of data over the years.

Despite all the challenges for IT and companies, employees continue to depend on the information saved in Public Folders.

This guide provides how-to procedures for creating and sharing Public Folder contact lists, calendars, and notes. It also makes the case for syncing Public Folder contacts, shared calendars, and notes to business smartphones for increasing productivity for employees and profitability for the organization.

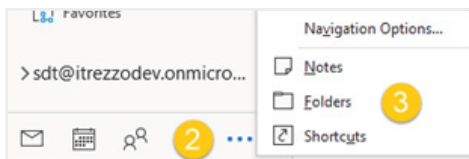


Create and Share Public Folder Contact Lists with Outlook Desktop

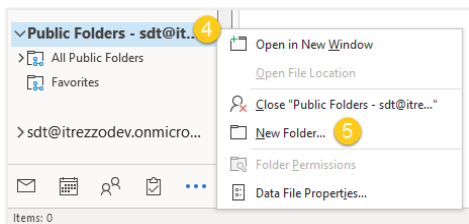
Public Folders act as a hub for data that can be seen, shared, and edited by users. These qualities make them the perfect environment for contact lists. When company contacts need to be immediately shared with a new user or quick edits need to be made and seen by multiple users, Outlook can be used to manage Public Folder user permissions allowing anyone with an Office 365 mail-enabled account to access these contact lists.

Create a Contact List

1. Log in to Outlook for Desktop.
2. Click the ellipsis at the bottom of the left-hand navigation panel.
3. Click **Folder** to go to the Outlook Folder View. (See figure below.)

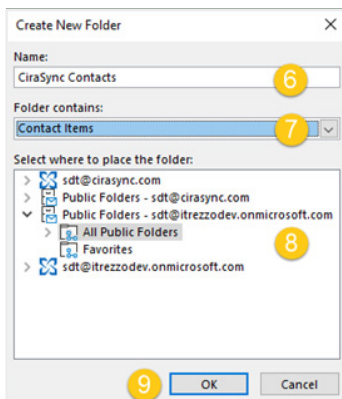


4. Right-click **Public Folders**.
5. Click **New Folder**.



TIP: You need to be the owner of the parent Public Folder to create subfolders.

6. Name the new folder. In this example, the new folder is called **Work Contacts**.
7. Select Contact Items in the drop-down menu under **Folder Contains**.
8. Select where to place the folder. In this example, the folder will be placed in **All Public Folders**.
9. Click **OK**. (See figure below.)



10. Double-click the new subfolder in the left-hand navigation panel.
11. Click **New Contact** at the top-left corner of the window to start adding contacts to this folder.

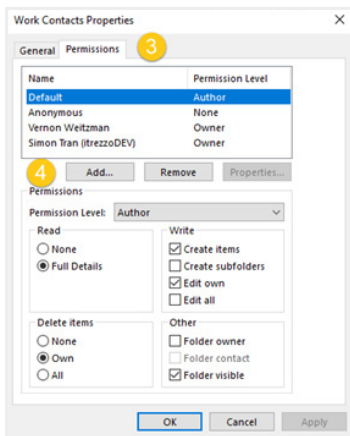
CiraSync is some of the best software on the market!

"CiraSync is the only software that works to sync our company contact database which reside in Public Folders."

Riyen R., System Administrator

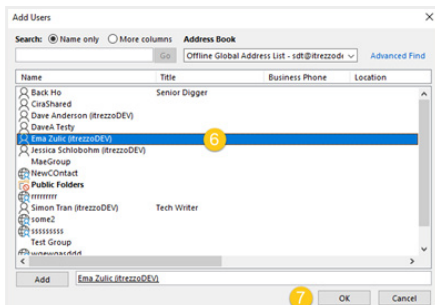
Share the Public Folder Contact List

1. Right-click the contact list created in the above procedure.
2. Click **Properties**.
3. Go to the **Permissions** tab.
4. Click **Add**. (See figure below.)



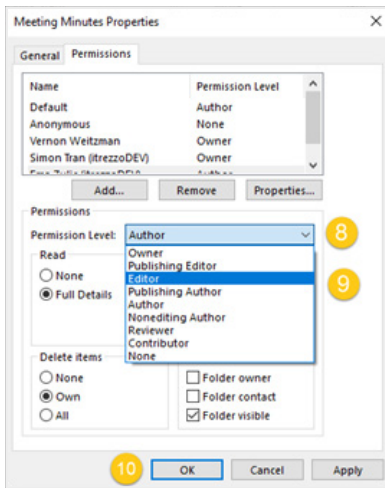
TIP: You can only share a Public Folder Contact List to a mail-enabled account.

5. Search for desired recipient(s) of the contact list.
6. Double-click the name to add.
7. Click **OK**. (See figure below.)



TIP: Use **Distribution Groups** to quickly modify multiple contact permissions with a single click.

8. Click the drop-down arrow in **Permission Level**.
9. Choose the permission level to assign to the added user.
10. Click **OK** to share your calendar. (See figure below.)



Very simple to use and configure

"We wanted to use a program that would sync a certain Public folder in our Exchange system into private folders. Plus, we operate in an Office 365 environment, so it also required to work with EOL. Once CiraSync was up and running, we have had very little to do in maintenance or updating."

Christopher M., IT Manager

Create and Share Public Folder Calendars with Outlook Desktop

The advantage of hosting shared calendar Public Folders is that any user with the correct permissions can view, edit, or add events to the calendar.

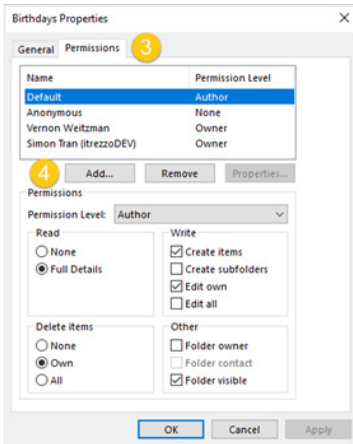
Create a Calendar

1. Follow **Steps 1–7** of **Create a Contact List** in the previous technical article titled **Create and Share Public Folder Contact Lists with Outlook Desktop**.
2. Select **Calendar Items** under **Folder contains**.
3. Select where to place the folder.
4. Click **OK**.
5. Double-click the new subfolder in the left-hand navigation panel.
6. Click **New Appointment** or **New Meeting** at the top-left corner of the window to add content to the folder.



Share the Calendar

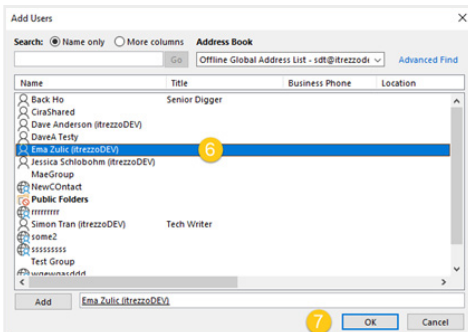
1. Right-click the calendar created in the previous section.
2. Click **Properties**.
3. Go to the **Permissions Tab**.
4. Click the **Add** button. (See figure below.)



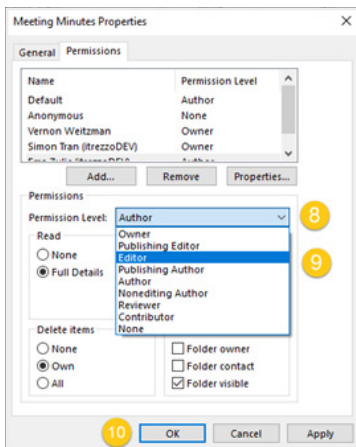
TIP: You can only share a Public Folder calendar to a mail-enabled account.

5. Search for recipient(s) of the calendar.
6. Double-click the name to add.
7. Click **OK**. (See figure below.)

TIP: Use **Distribution Groups** to quickly modify multiple contact permissions with a single click.



8. Click the drop-down arrow in **Permission Level**.
9. Choose the permission level to assign to the added user.
10. Click **OK** to share your calendar. (See figure below.)



CiraSync does what I need it to do

"Finally, a solution that allows us to access Public Folder contact list on Exchange Online with our many different personal smartphones. It is basically set it up and forget it."

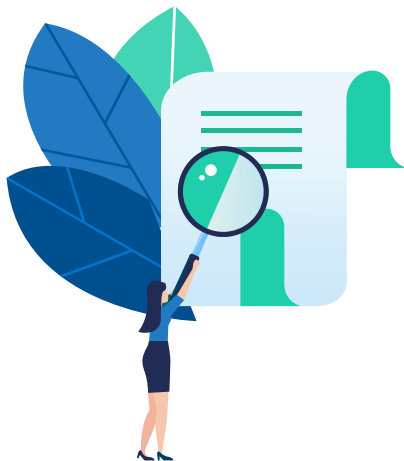
David F., IT Specialist

Create and Share Public Folder Notes with Outlook Desktop

The Public Folder functionality to act as a central hub for company data means they can also be used as a data archive for notes and announcements. Users with the correct permissions can access, edit, or add to this archive.

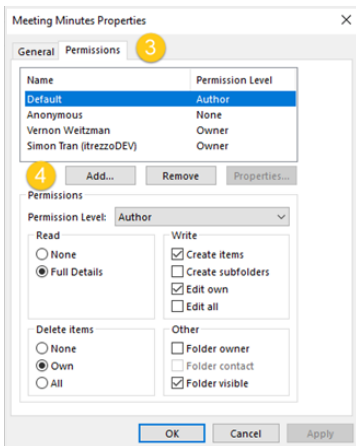
Create a Public Folder Note

1. Follow **Steps 1–7** of **Create a Contact List** in the first technical article titled **Create and Share Public Folder Contact Lists**.
2. Select **Note Items** in the drop-down menu under **Folder contains**.
3. Select a location for the Public Folder and click **OK**.
4. Double-click the new subfolder in the left-hand navigation panel.
5. Click **New Note** at the top-left corner of the window to start adding contents to the Public Folder.
6. Close the note to save the note.



Share Public Folder Notes

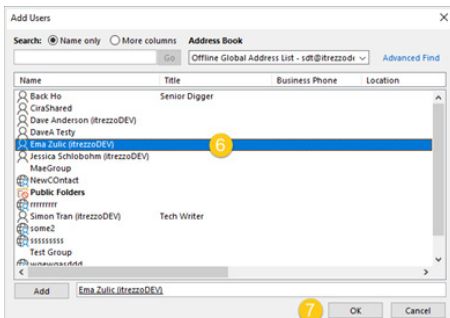
1. Right-click the Public Folder created in the previous section.
2. Click **Properties**.
3. Go to the **Permissions** tab.
4. Click **Add**. (See figure below.)



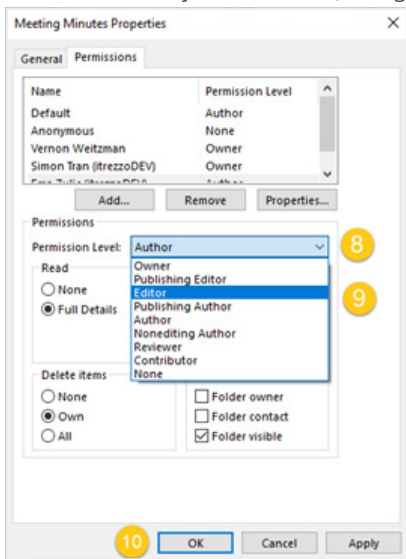
TIP: You can only share a Public Folders with a mail-enabled account.

5. Search for desired recipient(s) of the notes.
6. Double-click the name to add.
7. Click **OK**. (See figure below.)

TIP: Use **Distribution Groups** to quickly modify multiple contact permissions with a single click.



8. Click the drop-down arrow in **Permission Level**.
9. Choose the permission level to assign to the added user.
10. Click **OK** to share your calendar. (See figure below.)



Easy to deploy and manage

"Very easy to share Public Folder content to mobile devices in a streamlined interface that makes a lot of sense."

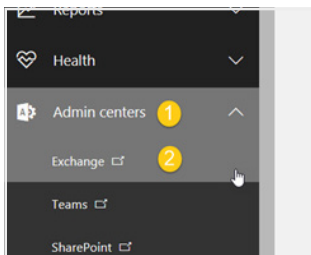
Brett L., System Administrator

Create and Share Public Folders with Office 365

Public Folders can also be created in Office 365; however, the ease-of-use provided by the Outlook UI is lost and the management of these Public Folders is limited to the creation of subfolders and editing user permissions.

Create a New Public Folder

1. Launch the Office 365 Admin Portal.
2. Click **Admin centers > Exchange** in the navigation panel to be taken to the Exchange Admin Center. (See figure below.)



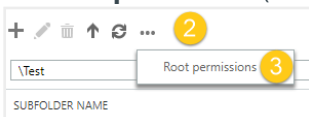
3. Click **public folders** in the navigation panel.
4. Click the **+** to create a new Public Folder.
5. Name the new Public Folder and click **SAVE**.

TIP: You need to be the owner of the parent Public Folder to create new Public Folders.

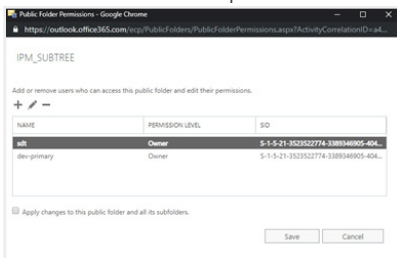


Share the Public Folder

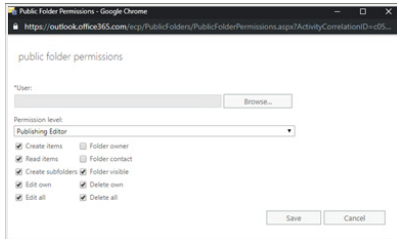
1. Double-click the Public Folder you created in the previous section.
2. Click the ellipsis.
3. Click **Root permissions**. (See figure below.)



The Public Folder root permissions window will appear. (See figure below.)



4. Click the **+**. The Public Folder Permissions window will appear. (See figure below.)



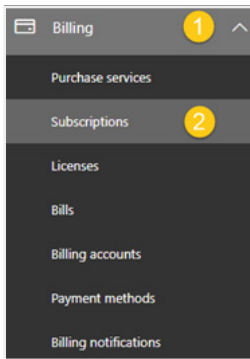
5. Click **Browse**.
6. Select the recipient of the Public Folder.
7. Click **OK**.
8. Click the drop-down arrow under **Permission level** to pull up the list of roles permissions that can be granted to users, and then select the desired role permissions.
9. Click **SAVE**. You will return to the Root Permissions Window.
10. Click **SAVE**.

Create Office 365 Dynamic Distribution Groups

Public Folders are sharable to a nearly infinite number of users. However, it can be a challenge to add permissions to each individual user manually. This can be solved by grouping users into a Dynamic Distribution Group, a feature available in Azure Active Directory Premium. With Dynamic Distribution Groups, Public Folders can be easily shared to multiple users with just a few clicks. This procedure describes how to set up Azure Active Directory Premium and how to create Dynamic Distribution Groups.

Set up Azure Active Directory Premium

1. Launch the Office 365 Admin Portal.
2. Click **Billing > Subscriptions** in the left navigation panel. (See figure below.)

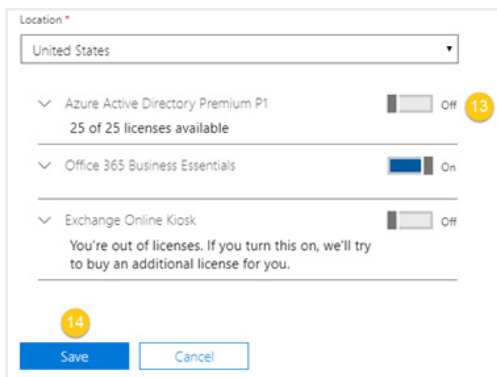


3. Click **+Add subscriptions** in the top-right corner of the pane.
4. Press **Ctrl + F** on keyboard.
5. Search for **Azure Active Directory Premium** in the search box.
6. Hover the mouse over the **Azure Active Directory Premium** tile.
7. Click **Buy Now**.

8. Click **Admin** in the top-left corner of the window.
9. Click **Billing > Subscriptions** in the left navigation panel.
10. Click **+Assign to users**.
11. Check the box next to the desired users for Azure Active Directory Premium.
12. Click **Edit** next to **Product licenses**. (See figure below.)

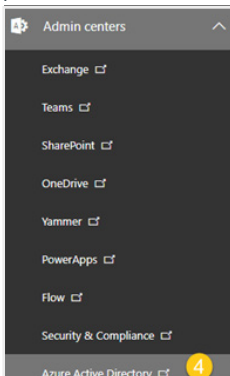


13. Click the slider next to **Azure Active Directory Premium**.
14. Click **Save**. (See figure below.)

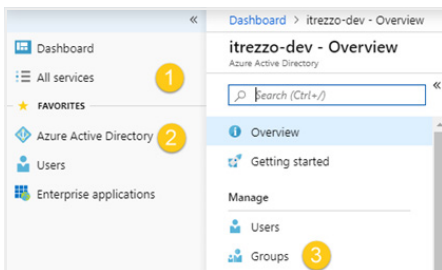


Create a Dynamic Distribution Group

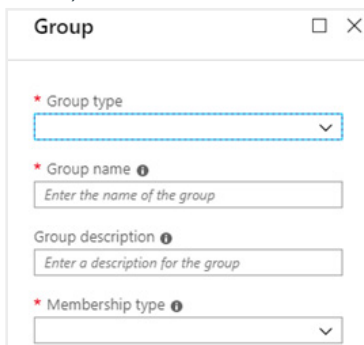
1. Log out of the Office 365 Admin account.
2. Log in to Office 365 Admin account.
3. Launch the Office 365 Admin Portal.
4. Click **Admin Centers > Azure Active Directory** from the left navigation panel in the Office 365 Admin Portal. (See figure below.)




5. Click **All Services > Azure Active Directory > Groups**. (See figure below.)



6. Click **+New group**. A form will appear on the screen to fill out. (See figure below.)



7. Set the **Group type** to **Security**.
9. Name the group and enter a group description.
10. Set the **Membership type** to **Dynamic User**.
11. Click **Add dynamic query**.
12. Click **Advance rule**.
13. Enter a LDAP query.
14. Click **Add query** and then click **Create**.

 **TIP:** It can take several minutes for the distribution group to be created.

CiraSync Syncing Multiple Public Folders

"We have multiple Public Folders containing a total of several thousand contacts. The ease-of-use and ability to begin syncs quickly was impressive. We previously used a competitive product that required significant setup, involvement of vendor support, and regular maintenance to work. CiraSync has worked wonderfully since the day we started."

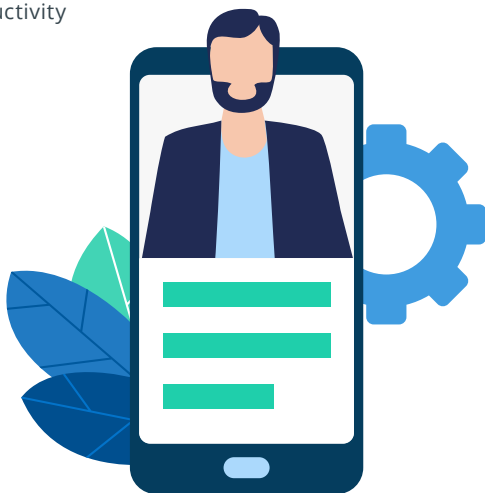
Executive Sponsor

Sync Office 365 Public Folder Contacts, Calendars, and Notes to Business Smartphones

The smartphone is an indispensable business tool that has radically changed the way we work. Business users require accurate and up-to-date information on customers, vendors, prospects, and coworkers on their smartphones at all times. Likewise, they need the ability to make sure important meetings and opportunities don't slip under the radar.

Microsoft has no mechanism to automatically sync Office 365 Public Folder contacts, calendars, and notes to business smartphones. Without an automated Public Folder sync solution, employees waste time looking up current contact information, can miss important meetings and deadlines, or are forced to make manual updates on smartphones.

This can mean a loss of productivity for users and loss of revenue for businesses.



CiraSync Solves the Automated Microsoft Sync Dilemma


CiraSync—secure, Azure-based SaaS solution—provides granular control and flexible targeting in syncing Exchange shared folders and subfolders to business smartphones.

The solution provides the following benefits:

- Syncs Public Folders and shared mailboxes on Office 365 to Outlook.
- Works with Public Folder contacts, calendars, and memo notes.
- Enables iPhone, Android, and Outlook users to view Public Folders in Office 365.
- Provides granular control to selectively filter out fields and target specific lists to specific smartphone users.
- Leverage existing distribution groups to ensure contacts are always in the right place.

How Cira Apps Ltd. Keeps Your Data Secure

CiraSync is GDPR compliant and uses Azure servers in the EU for European customers. As a SaaS platform, CiraSync integrates tightly with Microsoft Azure and uses the Azure Consent Framework. Subscriber data is kept within the Microsoft Cloud.



More than 6,000 companies with over 100,000 active users rely on CiraSync every day.

About Cira Apps Ltd.

Cira Apps Ltd. is a SaaS company with solutions that enhance Office 365 productivity for iPhone and Android business users. CiraSync, the flagship product, is used by more than 100,000 users at 6,000 companies around the globe to automate the syncing of contacts and shared calendars to business smartphones. The company is headquartered in San Jose, California. Learn more at www.cirasync.com.

Cira Apps Ltd.
www.cirasync.com

