

INSTALLATION AND QUICK START GUIDE

OfficeCalendar for Microsoft® Outlook™

Sharing Microsoft Outlook Calendar and Contacts without Exchange Server

"Sharing Microsoft Outlook Calendar and Contacts without Exchange Server"

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<http://www.officecalendar.com>



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OfficeCalendar Installation Overview

There are two components to the OfficeCalendar software program: the **OfficeCalendar Server** and the **OfficeCalendar Client**. The OfficeCalendar Server is the central bridge for which all Microsoft Outlook users communicate and exchange data between each other. The OfficeCalendar Client is a Microsoft Outlook add-in that becomes part of your Microsoft Outlook program. The OfficeCalendar Client allows you to view and modify others people's Outlook calendar as well as communicate with the OfficeCalendar Server, which in turn passes your calendar updates to other user's Outlook calendars, and vice versa.

The five basic steps to setting up OfficeCalendar are:

1. Download the trial version of OfficeCalendar

Download the trial version of OfficeCalendar from our website at <http://www.officecalendar.com/downloads/download.asp>. You only need to download the trial version of OfficeCalendar **once** – the software you'll need for all of your office's workstations are included within this download.

2. Install of the OfficeCalendar Server Software

The second thing you'll need to do is install the OfficeCalendar Server software. The OfficeCalendar Server software **is only installed on one computer**. The OfficeCalendar Server software can be installed on any computer connected to your office's network. If you have a dedicated computer in your office that acts as a network file and/or application server then you could install the OfficeCalendar Server software on that computer. If you are installing OfficeCalendar on a peer-to-peer network where there isn't a network server per-se, you will need to select one of the workstations on your network to install the OfficeCalendar Server. The OfficeCalendar Server and the OfficeCalendar client can be installed and utilized on the same computer without problems.

Microsoft Outlook does not need to be installed on the computer that is running the OfficeCalendar Server unless you will be using the OfficeCalendar client software on the same computer as well.

3. Add user accounts to the OfficeCalendar Server

Once you've installed the OfficeCalendar Server, you will need to open the OfficeCalendar Server application and add a user account for all of the users in your office that will share Outlook calendars, contacts, and tasks.

4. Ensure that the OfficeCalendar Client installation folder is shared on your network

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The initial OfficeCalendar Server installation also copies the OfficeCalendar Outlook add-in software required for each Outlook user to a folder called **c:\ocalclient**. This is done for your convenience so that each user on your network doesn't have to download the OfficeCalendar software separately.

During the initial installation of the OfficeCalendar Server, the OfficeCalendar installer copies the OfficeCalendar Client installation files to a specified folder and attempts to create a network share on this specified folder for you. However, this may not work on some computers.

5. Install the OfficeCalendar client add-in on each Microsoft Outlook workstation

Finally, after you have created user accounts for all of your users, the OfficeCalendar client is installed on each person's computer that will share Microsoft Outlook calendar, contacts, and tasks in your office.

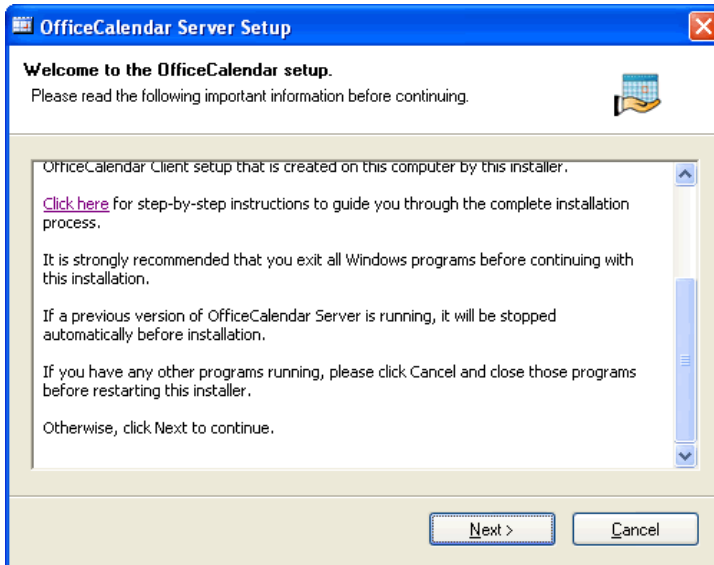
Installing the OfficeCalendar Server

1. If you have not done so already, download the OfficeCalendar trial version from our website at <http://www.officecalendar.com/downloads/trial.asp>.
2. Double-click on the **ocinstall.exe** file that you downloaded from www.officecalendar.com.

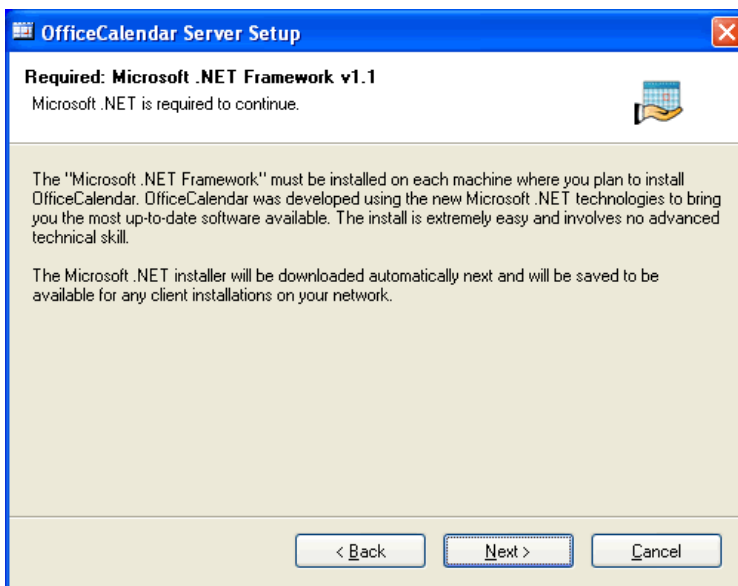


ocinstall.exe

3. From the **OfficeCalendar Server Setup Welcome** screen, please note that you will only need to install the "ocinstall.exe" file you downloaded once. During the initial setup, OfficeCalendar Server installer will create a shared network folder which will be used to install the OfficeCalendar client software for Microsoft Outlook. Click **Next** to proceed with your OfficeCalendar installation.



4. If you do not have Microsoft's .NET Framework installed on your computer you will see the screen below – please proceed to step 4a. If you do have the Microsoft .NET Framework installed on your computer you will not see the screen below -- please proceed to **Step 5** (on page 7).



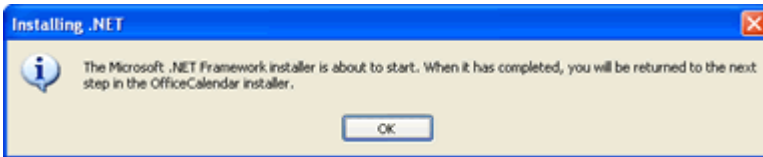
To install the Microsoft .NET Framework:

- a. Click **Next** to proceed with the .NET Framework download.
- b. Once the download has completed you will see the screen below; click **OK** to start the .NET Framework installer.

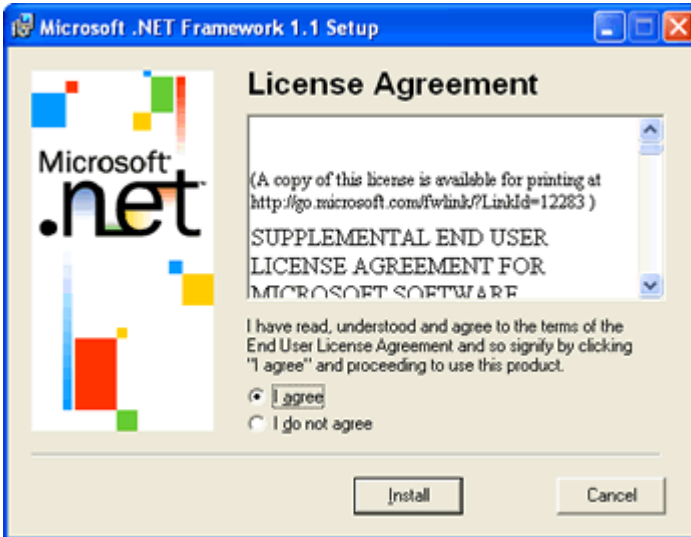
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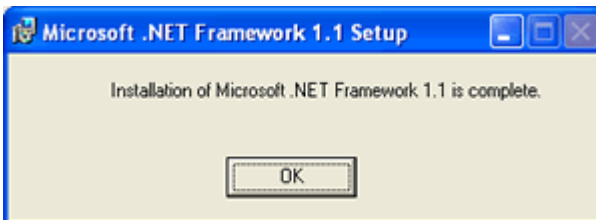
<http://www.officecalendar.com>



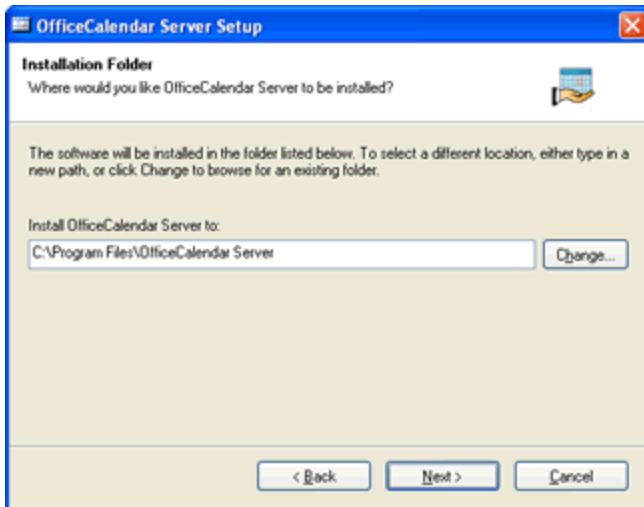
- c. Review the license agreement for the Microsoft .NET Framework, then click the **I agree** radio button; and click the **Install** button to proceed.



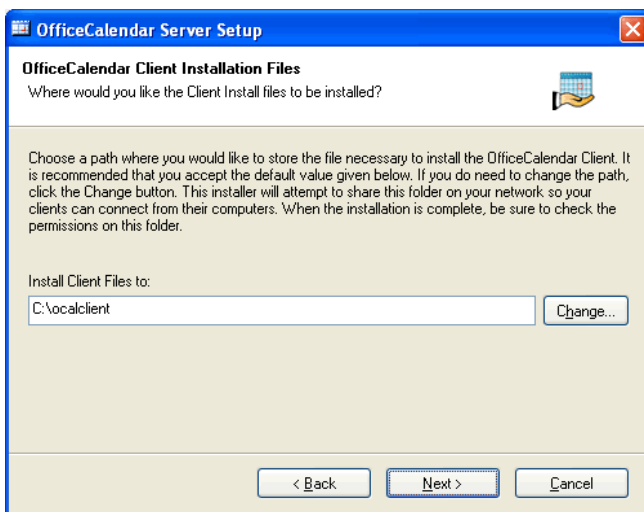
- d. When the .NET Framework installation is complete you'll see the dialog box below; click **OK** to return to the OfficeCalendar Server installation.



5. Select an installation folder for the OfficeCalendar Server (for ease of support we recommend that you choose the default location of **C:\Program Files\OfficeCalendar Server**); and click **Next**.



6. Select an installation folder for the OfficeCalendar client installation files (for ease of support we recommend that you choose the default location of **C:\ocalclient**), and click **Next**.

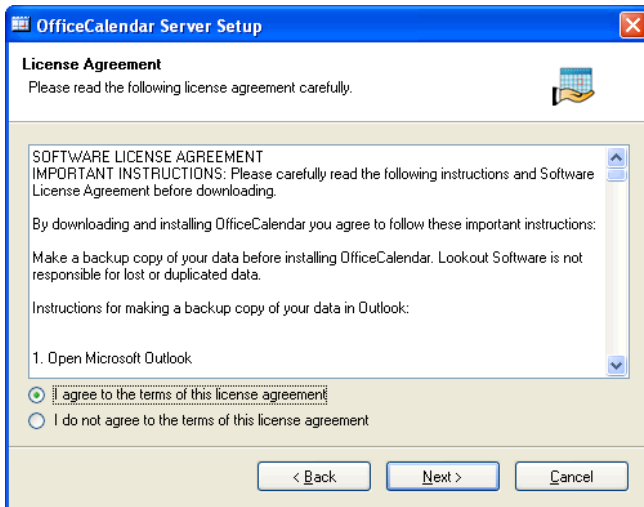


7. Please read the OfficeCalendar license agreement; click the ***I agree to the terms of this license agreement*** radio button; and click **Next**.

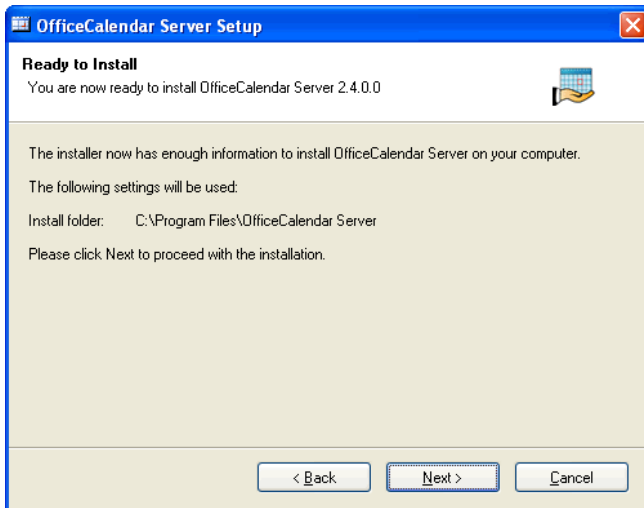
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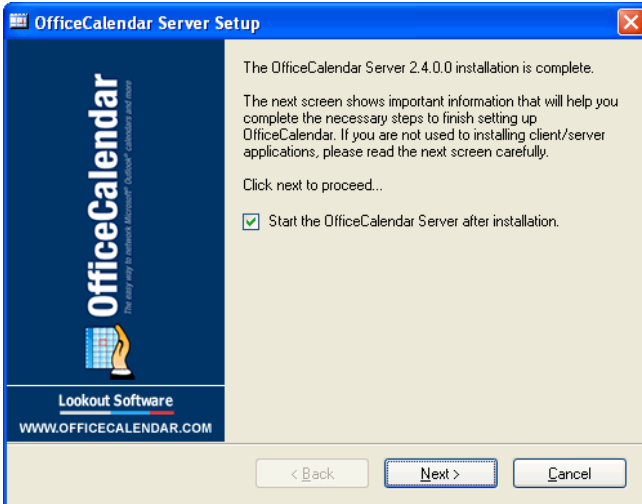
<http://www.officecalendar.com>



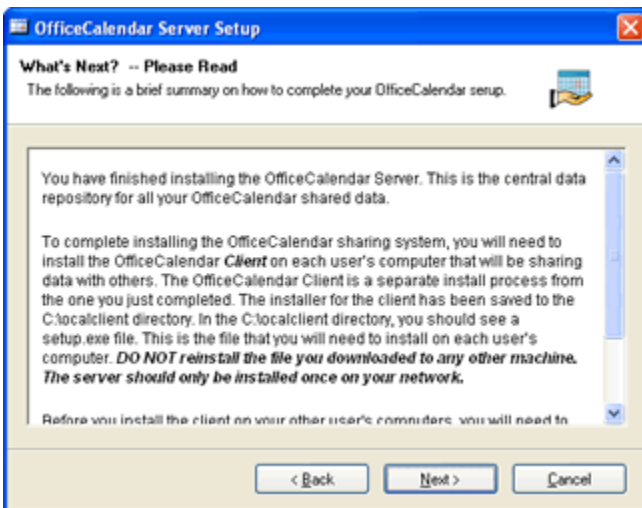
8. From the **Ready to Install** dialog box; click **Next**.



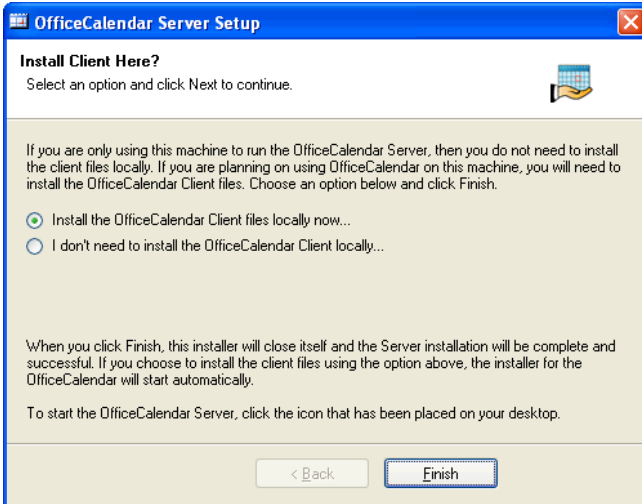
9. Once the OfficeCalendar Server setup has successfully installed; click **Next**.



10. The **What's Next** screen briefly describes the steps you'll need to perform after installing the OfficeCalendar Server. Please take a minute to read through the **What's Next** screen text, and click **Next**.



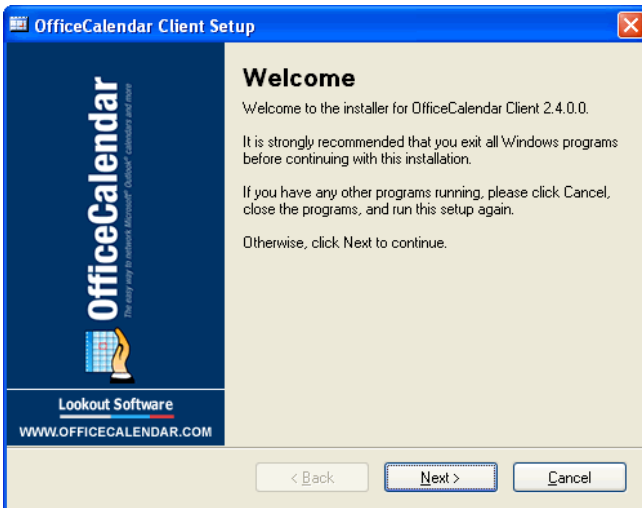
11. From the **Install Client Here?** screen, choose whether or not you want to install the OfficeCalendar Client software on this computer, and click **Finish**. Proceed to **Step 12** if you chose to install the OfficeCalendar Client software on this computer. Proceed to the topic **"Adding User Accounts to the OfficeCalendar Server"** on page 14 if you chose not to install the OfficeCalendar client software on this computer. See the below further explanation of this screen if needed.



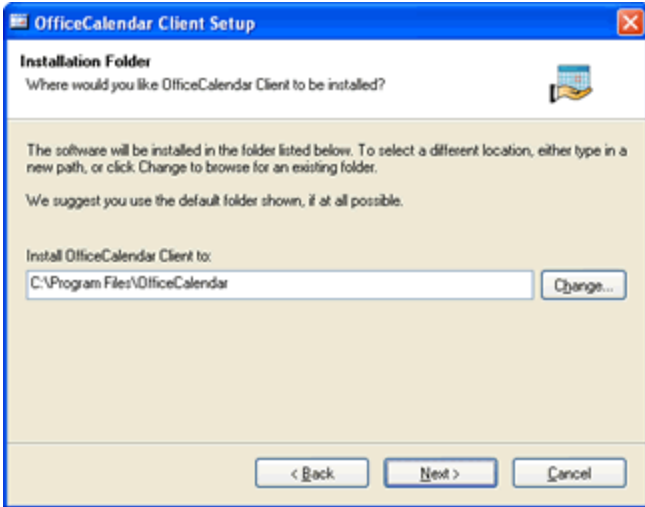
Install Client Here?

You do not need to install the Client files if you are only using this particular computer to run the OfficeCalendar Server. Select **Install the OfficeCalendar Client files locally now... option if someone is using Microsoft Outlook on this computer and wants to share Outlook information with other users.**

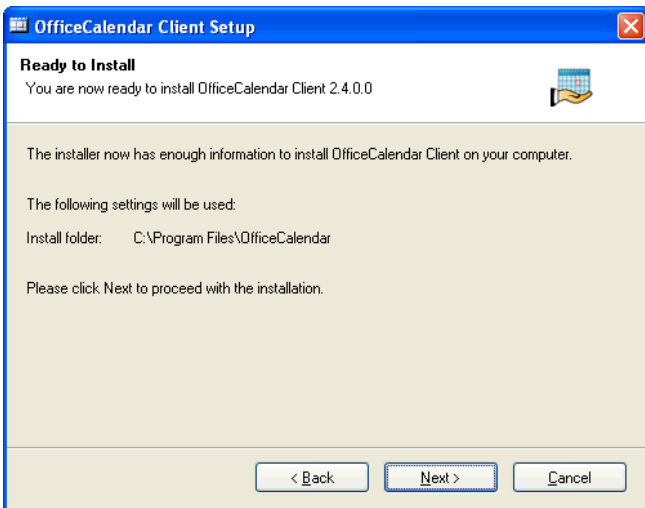
12. From the OfficeCalendar Client Setup **Welcome** screen, click **Next**.



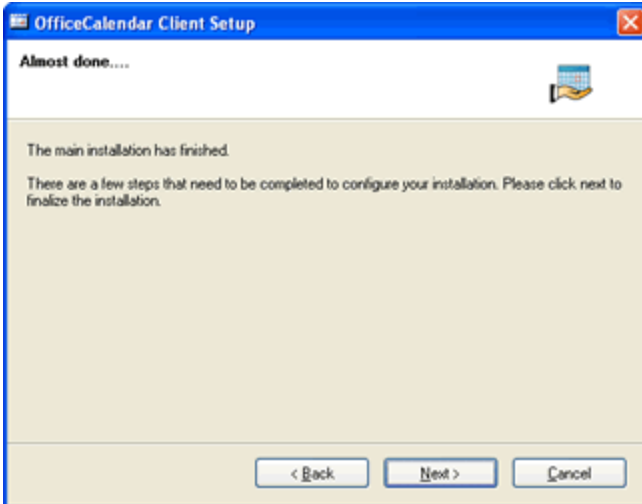
13. From the OfficeCalendar Client Setup **Installation Folder** screen, choose a folder to install the OfficeCalendar Client software to, and click **Next**. *We suggest you use the default folder shown for ease of support.*



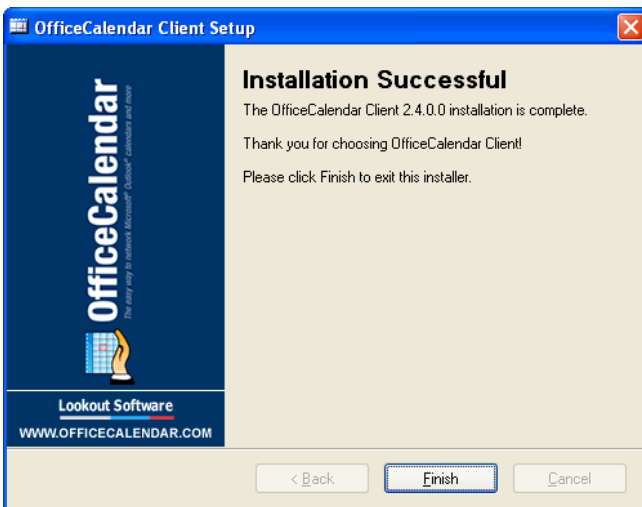
14. From the OfficeCalendar Client Setup **Ready to Install** screen, click **Next**.



15. From the OfficeCalendar Client Setup **Almost done...** screen, click **Next**.



16. You will see the **Installation Successful** screen (shown below) once the installation for the OfficeCalendar Client is complete; click **Finish** to close the OfficeCalendar Client Setup, and proceed to the next topic ***“Adding User Accounts to the OfficeCalendar Server”***.



Adding User Accounts to the OfficeCalendar Server

Once you have installed the OfficeCalendar Server it is best to create user accounts for all of the users that will use OfficeCalendar before proceeding to the OfficeCalendar client installation.

1. Start the OfficeCalendar Server by clicking on the **OfficeCalendar Server** icon.

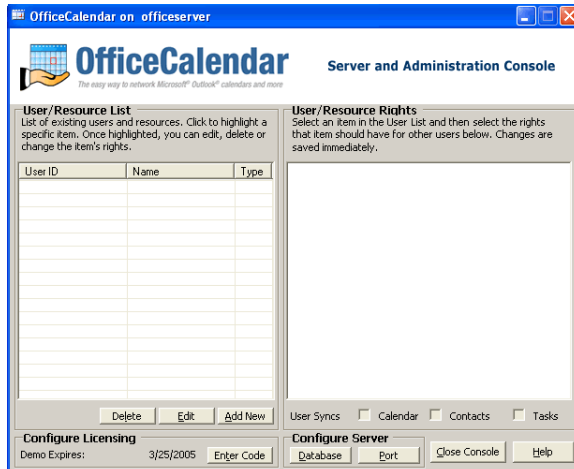
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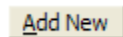
<http://www.officecalendar.com>



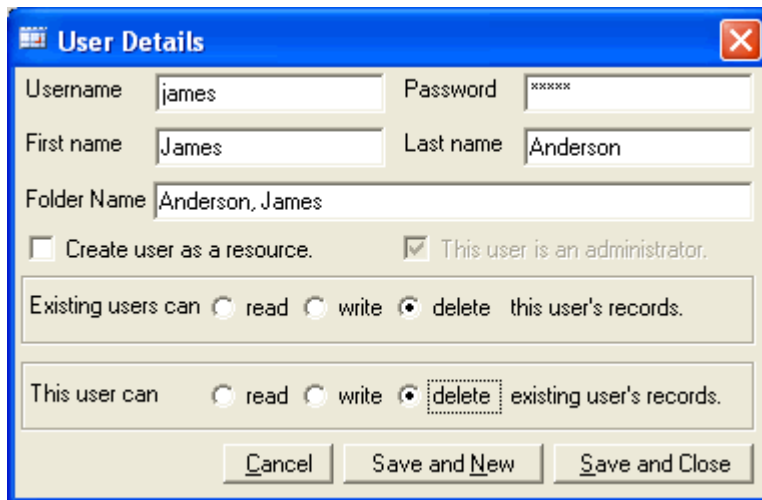
- The OfficeCalendar Server and Administration console screen will appear.



- From the OfficeCalendar Server Administration console click the **Add New** button.



- Enter a username, password, the first name, last name, folder name (this is what will be displayed in other people's Outlook folder list) for the first user you wish to add to OfficeCalendar; assign the default security rights for the user you are adding; and click **Save and New** or **Save and Close**.



- You will see a screen titled "Remember Login Information!" after saving a new OfficeCalendar administrator. In order to log into the OfficeCalendar Server and

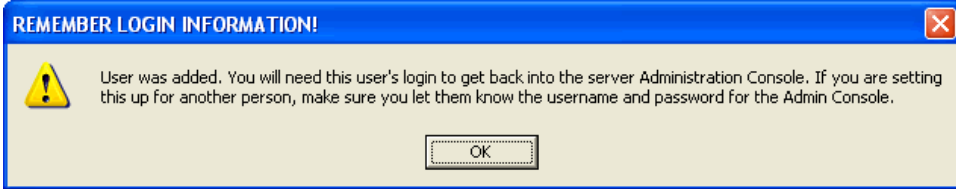
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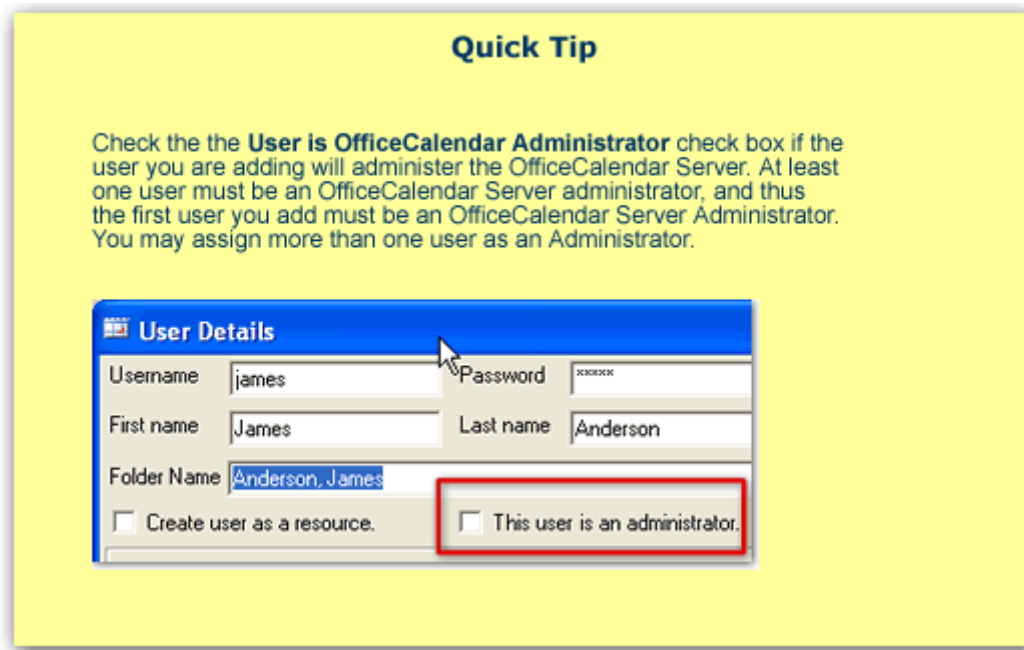
<http://www.officecalendar.com>



Administration console you will need to remember this username and password – if you are setting up administrator account for another person, be sure to let them know the username and password. Only those users that need to access administrative functions (creating/editing/deleting users accounts, user security rights, etc) need to be assigned as an administrator in OfficeCalendar.



6. Repeat steps 3 and 4 until you have finished adding all users.



Ensure that the OfficeCalendar Client Installation Folder is shared on your network

Ensure that the **c:\ocalclient** folder on the computer where you installed the OfficeCalendar Server is shared on your network so that all workstations wishing to use OfficeCalendar can browse to it in order to install the OfficeCalendar Client for Microsoft Outlook. All workstations needing to install the OfficeCalendar Client will need access to this shared folder.

During the initial installation of the OfficeCalendar Server, the OfficeCalendar installer copies the OfficeCalendar Client installation files to a specified folder and attempts to create a network share on this specified folder. However, this may not

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work on some computers. The default location for the OfficeCalendar installation files is **c:\ocalclient**. You can quickly determine if this folder is shared to other network users by browsing to the **c:** folder (on the computer where you installed the OfficeCalendar Server) with Windows Explorer or My Computer. Locate the **ocalclient** folder - if it is shared to other network users the folder will have a hand just under the folder as shown in the illustration below.



If the OfficeCalendar installer was unable to create a share on your designated OfficeCalendar Server computer, you can easily create a share manually by following the instructions below.

To share the c:\ocalclient folder on your network:

1. Open Windows Explorer, and then locate the folder **c:\ocalclient**.
2. Right-click on the **c:\ocalclient** folder, and then click **Sharing and Security**.
3. Select the check box **Share this folder on the network**; and click **OK**.

You will now notice that **c:\ocalclient** folder now has a hand beneath it to indicate that it is shared on your network.



Quick Tip

What if you can't share the ocalclient folder?

If, for some reason, a workstation cannot open the shared ocalclient folder there is a simple alternative to installing the OfficeCalendar client: simply copy the entire ocalclient folder to another drive on your network that is accessible to the workstation, and have the workstation install from this new accessible share.

Installing the OfficeCalendar Add-on Client on Microsoft® Outlook Workstations

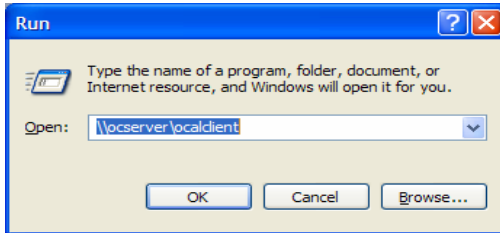
1. From each workstation where you are installing the OfficeCalendar Outlook add-in client, browse to the **ocalclient** folder on the computer where the OfficeCalendar Server is installed. The easiest way to do this is to click **Start | Run**; and type in

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YourOfficeCalendarServer'sComputerName\localclient; and click **OK**. (In the example below, "**ocserver**" is the OfficeCalendar Server's computer name.)



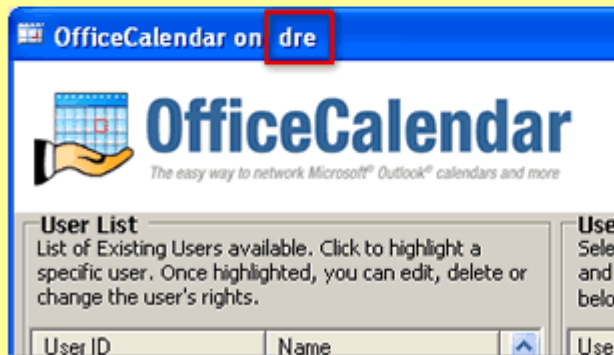
Quick Tip

Don't know your OfficeCalendar Server's computer name?

If you do not know the name of the computer where your OfficeCalendar Server is running simply open the OfficeCalendar Server program on that computer. Open the OfficeCalendar Server program by right-clicking on the OfficeCalendar Server icon (shown below) in the task tray and selecting **Show Admin Console**. If the icon is not in the task tray, then the OfficeCalendar Server will need to be started.



The OfficeCalendar Server's computer name is displayed at the top of the OfficeCalendar Admin Console screen (highlighted below).

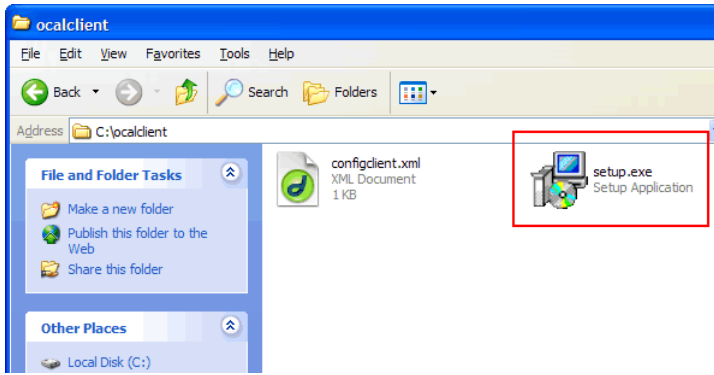


2. Double-click on the **setup.exe** icon (show below).

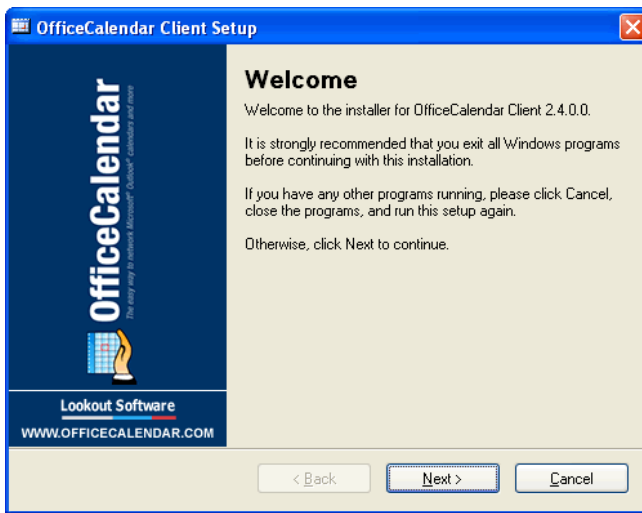
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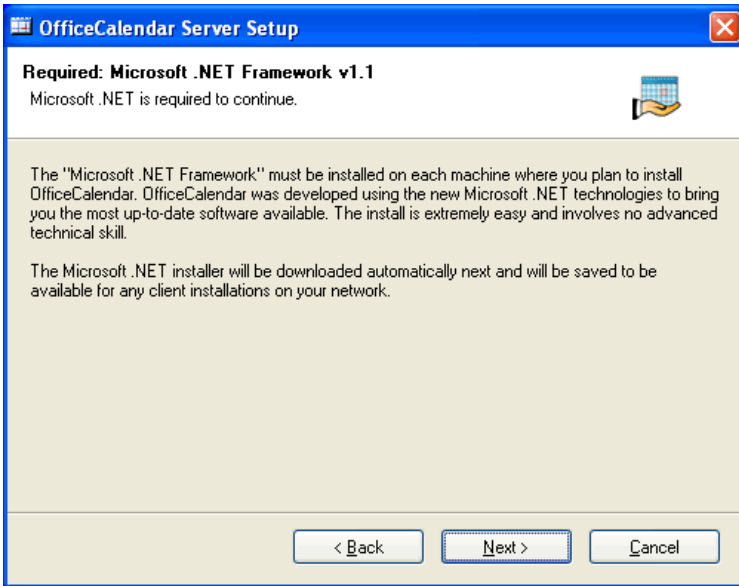
<http://www.officecalendar.com>



3. From the OfficeCalendar Setup **Welcome** screen, click **Next**.



4. If you do not have Microsoft's .NET Framework installed on your computer you will see the screen below – please proceed to step **4a** below. If you do have the Microsoft .NET Framework installed on your computer you will not see the screen below - please proceed to step **5**.

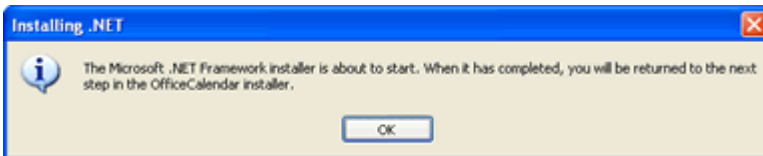


To Install the Microsoft .NET Framework:

- a. Click Next to proceed with the .NET Framework download.

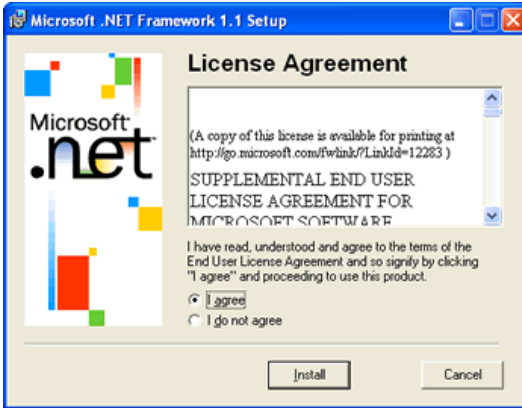
Please wait while the .NET Framework is downloaded (Note: this may take several minutes)...

- b. Once the .NET Framework download has completed you will see the screen below; click **OK**. Click **Yes** to start the .NET Framework installation.

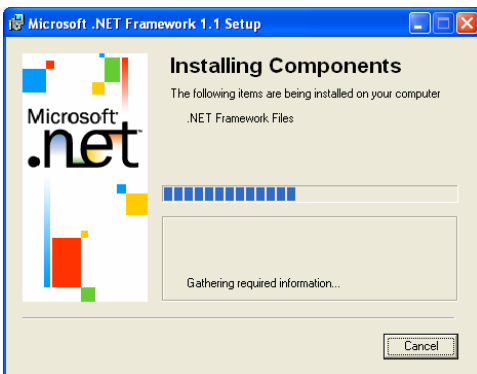


Please wait while the .NET Framework files are extracted for installation...

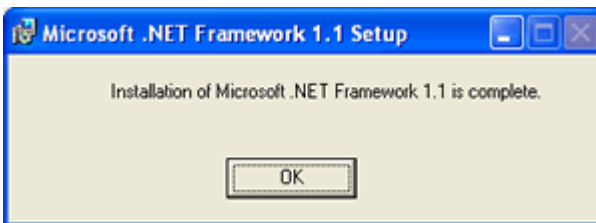
- c. Review the license agreement for the Microsoft .NET Framework, then click the **I agree** radio button; and click the **Install** button to proceed.



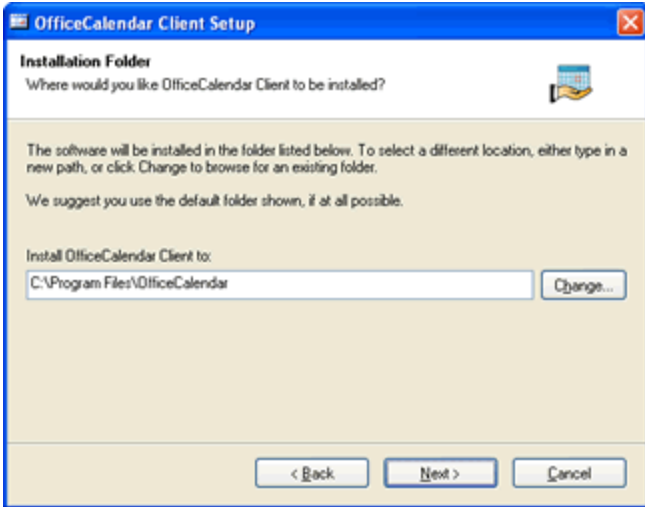
Please wait while the .NET framework installs...



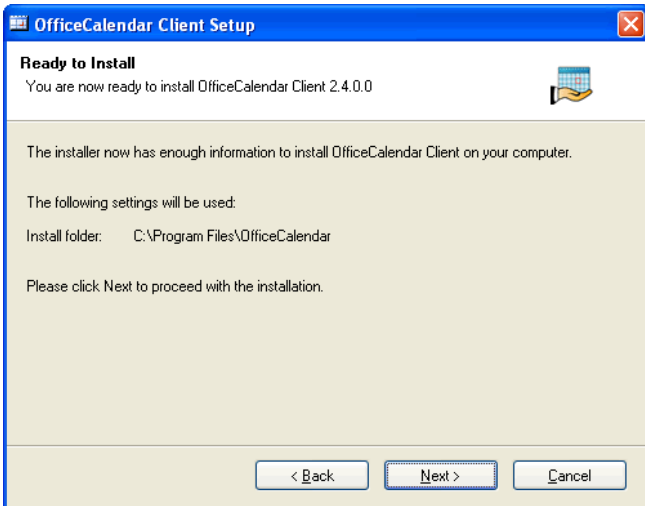
d. When the .NET Framework installation is complete you'll see the dialog box below; click **OK** to return to the OfficeCalendar Client installation process.



5. Select an installation folder for the OfficeCalendar Client installation (for ease of support we recommend that you choose the default location of C:\Program Files\OfficeCalendar); and click **Next**.

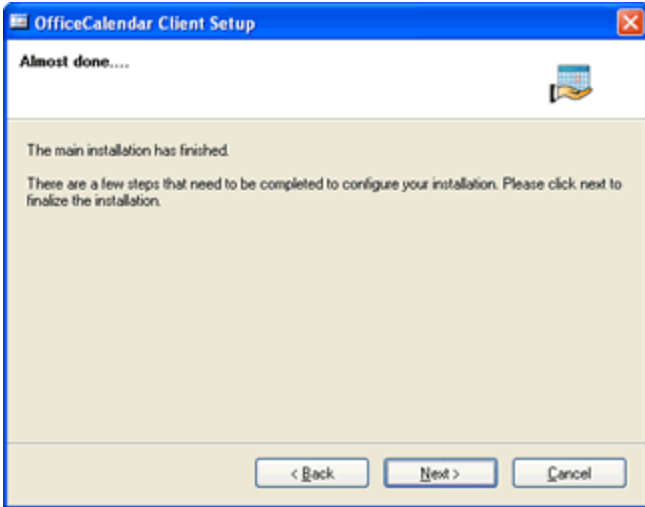


6. From the *Ready to Install* screen; click **Next**.

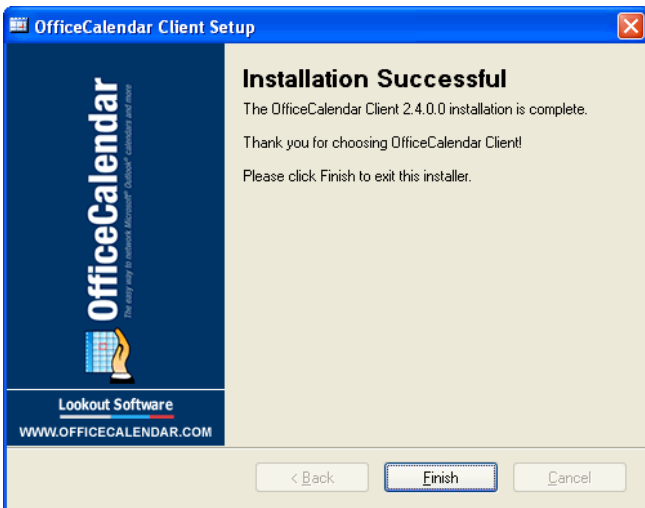


Please wait while the OfficeCalendar client installs...

7. From the **Almost done...** screen, click **Next**.

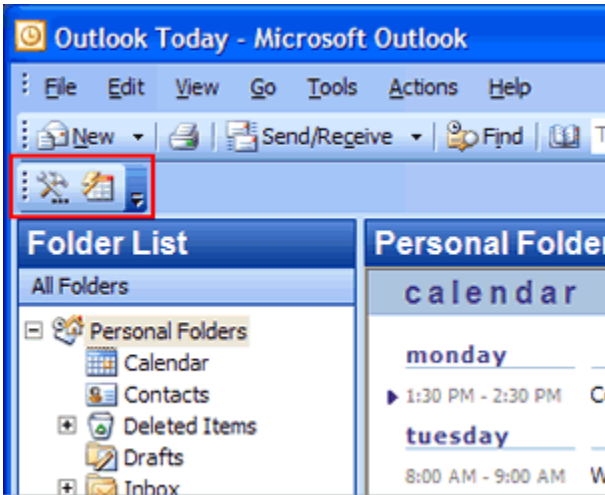


8. Click **Finish** when the OfficeCalendar Client installation is complete.



9. Start Microsoft Outlook on your computer.

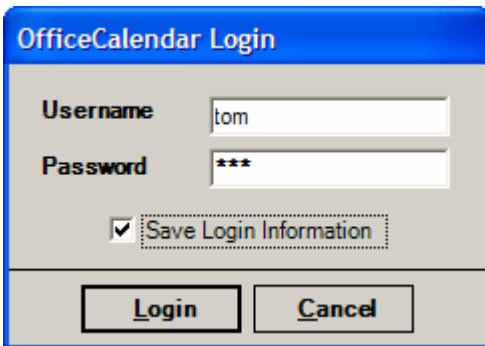
The OfficeCalendar Client added two icons to your Microsoft Outlook toolbar once installed (shown in the Illustration below).




Click on the **Synchronize OfficeCalendar** icon.



The **OfficeCalendar Login** dialog will appear; type your *Username* and *Password* and click **Login**. (**Note:** Each OfficeCalendar client login must be unique – please ensure that you are using the correct Username and Password that was assigned to you.)



You'll notice that the synchronization icon will change states to  while your Outlook is synchronizing with the OfficeCalendar Server. Once the synchronization is complete it will change back to its original state.

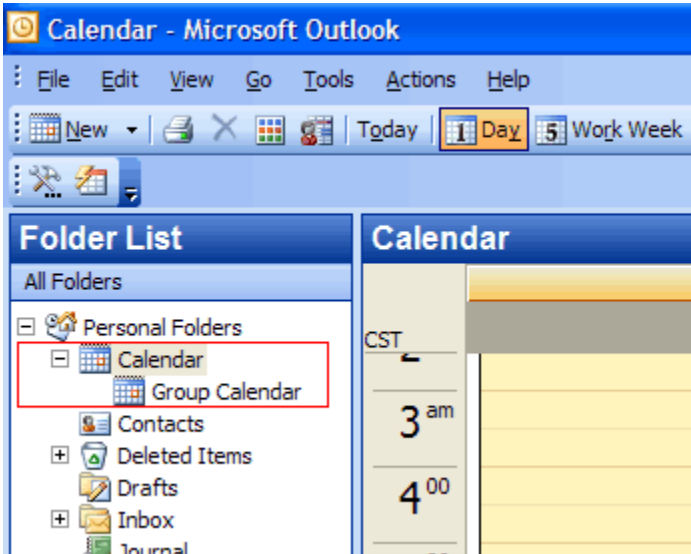
Once your first synchronization is complete you'll notice that new folders have been created under your root (main) Calendar, Contacts, and/or Tasks folders. A new folder will be created for everyone that has previously performed his or her first synchronization of OfficeCalendar, along with an additional folder under your **Calendar** folder called **Group Calendar**. New folders will appear after other OfficeCalendar users synchronize their Outlook with the OfficeCalendar Server for the first time.

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If you are the first person to synchronize with the OfficeCalendar Server you will only see the **Group Calendar** sub-folder under your **Calendar** folder. No other items will be created for any of the other users you are sharing Outlook information with until they have performed their first OfficeCalendar synchronization.



Once other users have synchronized their Outlook data with the OfficeCalendar Server, their folders will appear in your Outlook folder list during your subsequent synchronizations.

