INSTALLATION AND QUICK START GUIDE
OfficeCalendar for Microsoft® Outlook™
Sharing Microsoft Outlook Calendar and Contacts without Exchange Server

By Lookout Software

OfficeCalendar

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What is OfficeCalendar? Sharing Microsoft Outlook Calendars and More…

OfficeCalendar is a simple software program that allows you to share Microsoft Outlook calendars without Microsoft Exchange Server. You can also share Outlook email, contacts, distribution lists and tasks with OfficeCalendar, and create editable group calendars where multiple users' Outlook calendar data is combined into a single calendar folder for easy group scheduling.

Whether you have a dedicated server computer or a basic peer-to-peer network, OfficeCalendar can be installed on practically any Microsoft Windows® based network. Each person wishing to share Outlook calendars, email, contacts, tasks, and/or distribution lists with OfficeCalendar must have a copy of Microsoft Outlook 2000, XP, 2003 or 2007. However, OfficeCalendar can work with a combination of these Outlook versions. OfficeCalendar does not work with Microsoft Outlook Express, which is a different product from Microsoft Corporation.

Once OfficeCalendar is installed and configured on your network it will create sub-folders under each of your Outlook objects (calendar, contacts and tasks) for each other person that is sharing their Outlook information with you. For example, if you have a total of four users sharing Outlook with each other, OfficeCalendar will configure your Calendar folder structure similar to the illustration below.
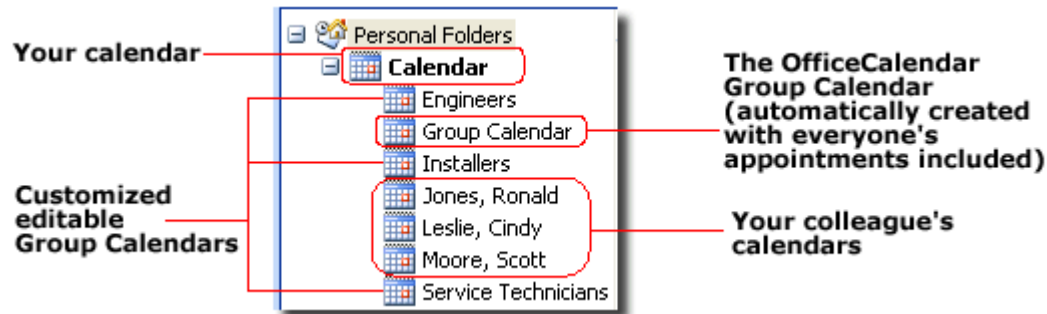
Your personal Outlook calendar is always at the top of the calendar structure (this is the same for your Outlook contacts and tasks as well). Each other person you are sharing Outlook calendars with is listed by name directly under your calendar along with customized group calendars that show multiple users' appointments rolled into a single calendar view (see "Customized editable Group Calendars" caption above).

Shared Outlook email folders also appear as sub-folders, but you can change the name of the shared folder that will display under your Inbox once you've accepted the invitation from another user to share their email folder.

Nothing changes in the way you use Outlook after OfficeCalendar is installed. Entering appointments, contacts, etc. in Outlook with OfficeCalendar installed is accomplished in exactly the same way it was before OfficeCalendar was installed. For example, if you want to add an appointment to a colleague's calendar, just navigate

to their Calendar folder from within your own Outlook, and enter the appointment item just as you would in your own calendar. Once your automatic synchronization has run, or you've clicked on the synchronization button, the appointment you added from within your copy of Outlook will then be added to the OfficeCalendar database. The appointment will then be added to your colleague's Microsoft Outlook calendar upon their next synchronization of OfficeCalendar. Each change made to your Outlook calendar, contacts and tasks by other users will prompt a notification of their change during your next sync. All changes made to an Outlook appointment, contact, distribution list and task are also documented in a history report for easy reference.

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 other people's Outlook calendar as well as communicate with the OfficeCalendar Server, which in turn passes your calendar updates to other users' 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.aspx. 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 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 Administration Console and add user accounts for all of the users in your office that will share Outlook calendars, contacts and tasks. Email sharing is set up using a different method, which is explained in the OfficeCalendar Installation and User's Guide.

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

   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/download.aspx.

2. Double-click on the **ocinstall.exe** file that you downloaded from www.officecalendar.com.


   ocinstall.exe

3. From the **Welcome to the OfficeCalendar setup** screen, please note that you will only need to install the "**ocinstall.exe**" file you downloaded once. During the initial setup, the 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.
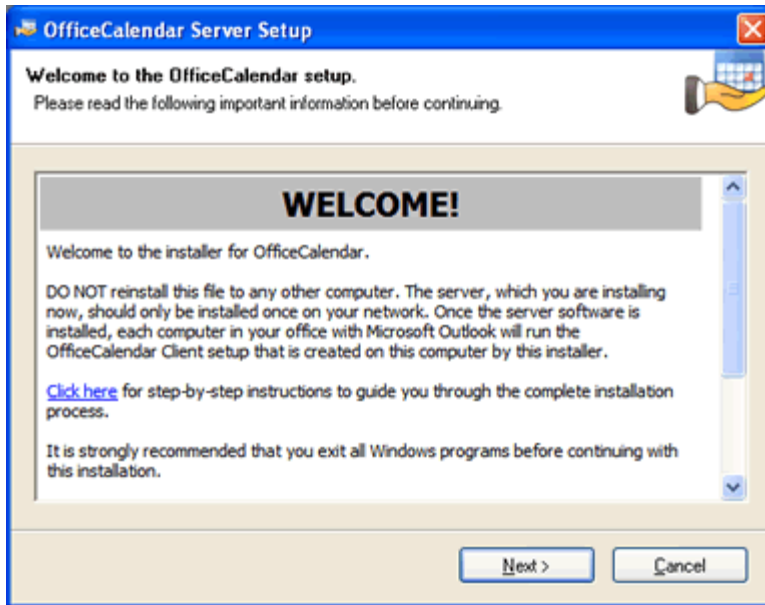
4. If you <u>do not</u> have Microsoft's .NET Framework installed on your computer you will see the screen below – please proceed to *step 4a*. If you <u>do</u> have the Microsoft .NET Framework installed on your computer you will not see the screen below -- please proceed to *step 5* (on *page 8*).
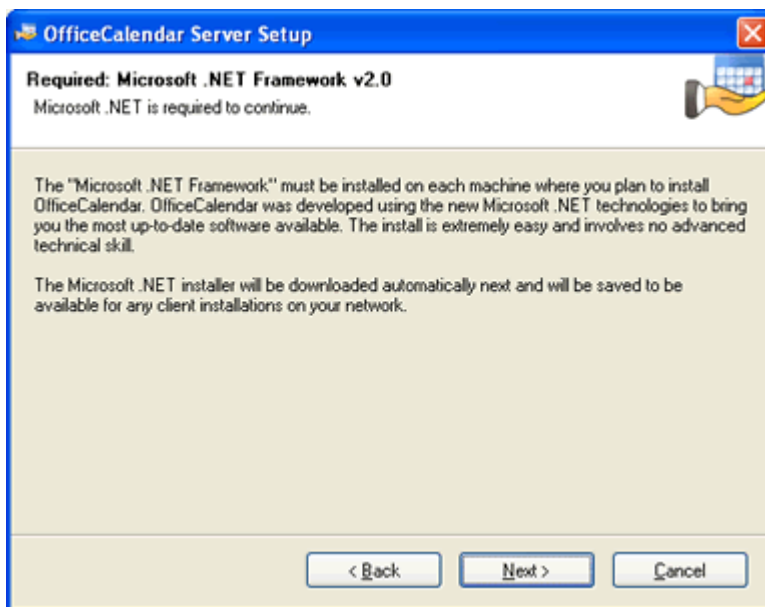

To install the Microsoft .NET Framework:

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.
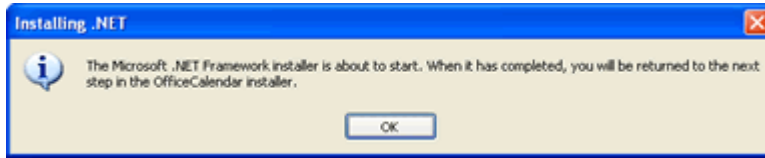

c. Review the license agreement for the Microsoft .NET Framework, then click the **I accept the terms of the License Agreement** check box; and click the **Install** button to proceed.
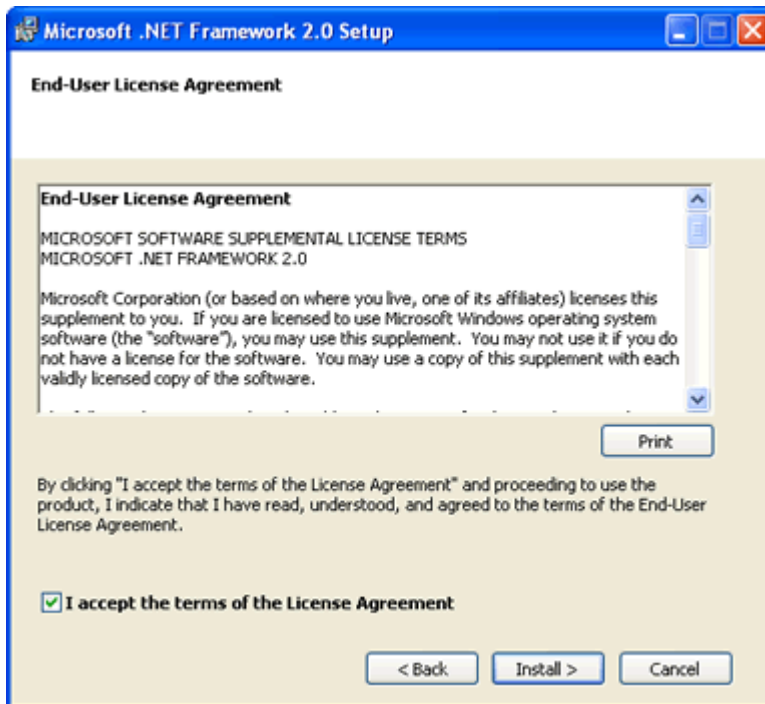
d. When the .NET Framework installation is complete you'll see the dialog box below; click **Finish** to return to the OfficeCalendar Server installation.
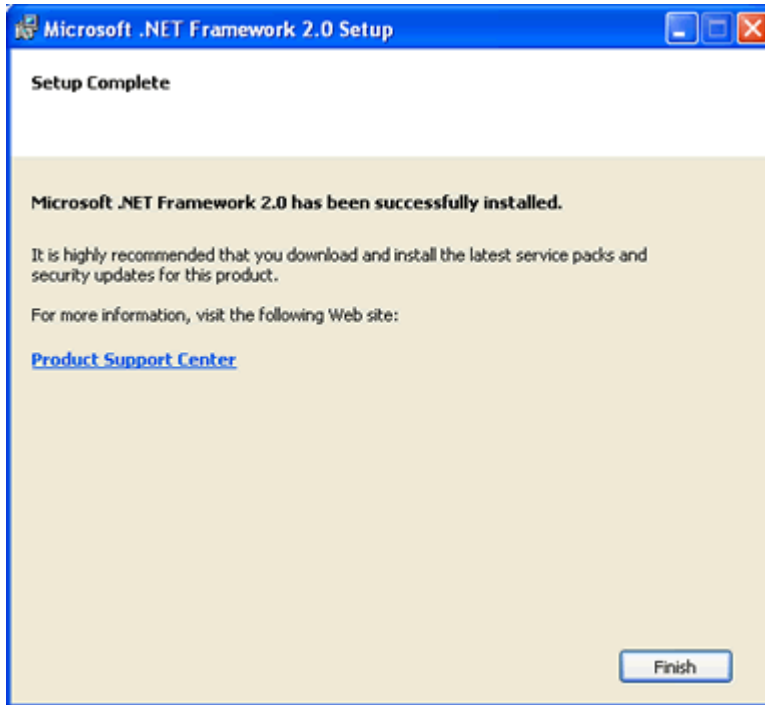
5. Select an installation folder for the OfficeCalendar Server (for ease of support we recommend that you choose the default location of **C:\Program Files\OfficeCalendar Server**); and click **Next**.
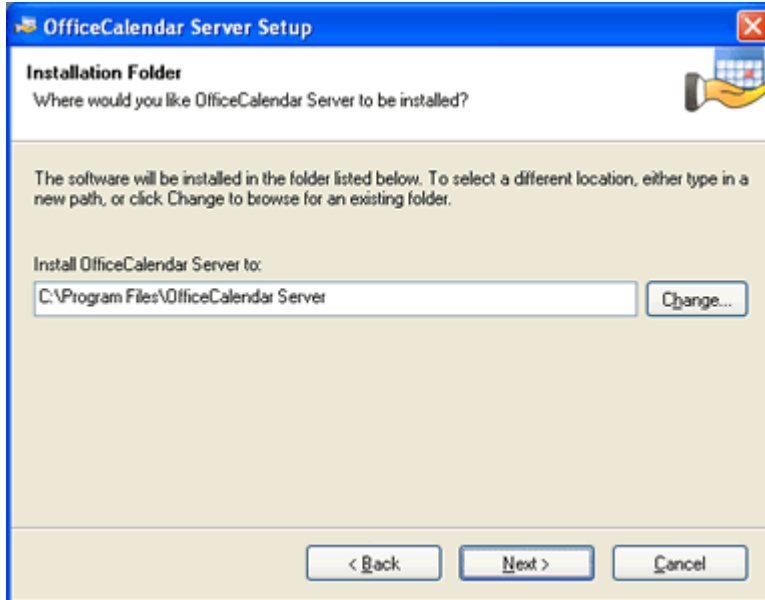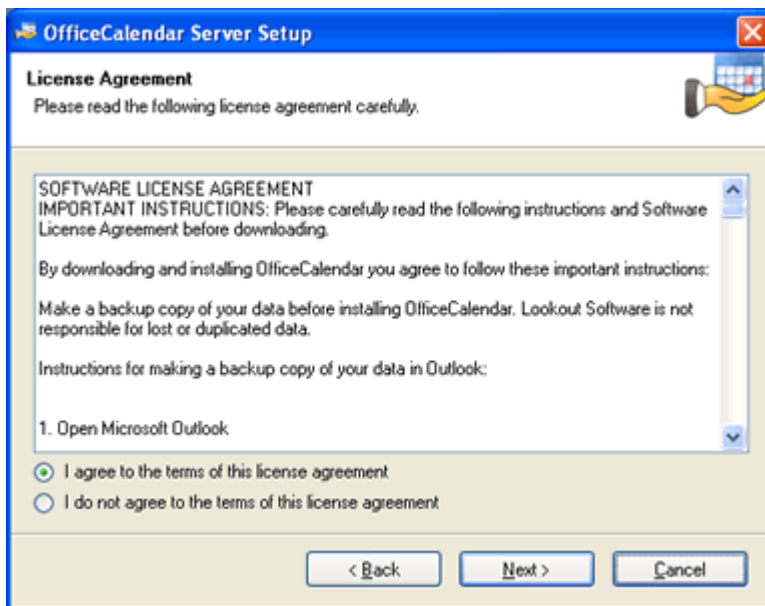

6. Select an installation folder for the OfficeCalendar Client installation files (for ease of support we recommend that you choose the default location of **C:\ocalclient**), and click **Next**.
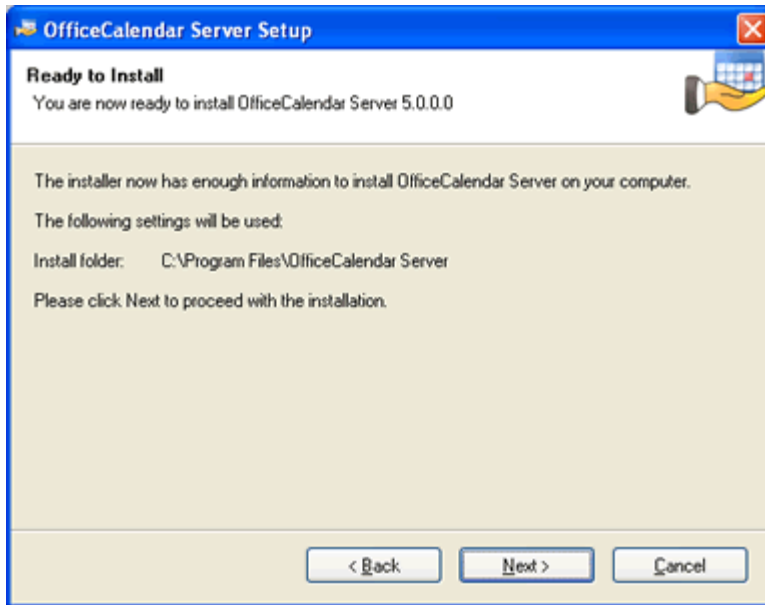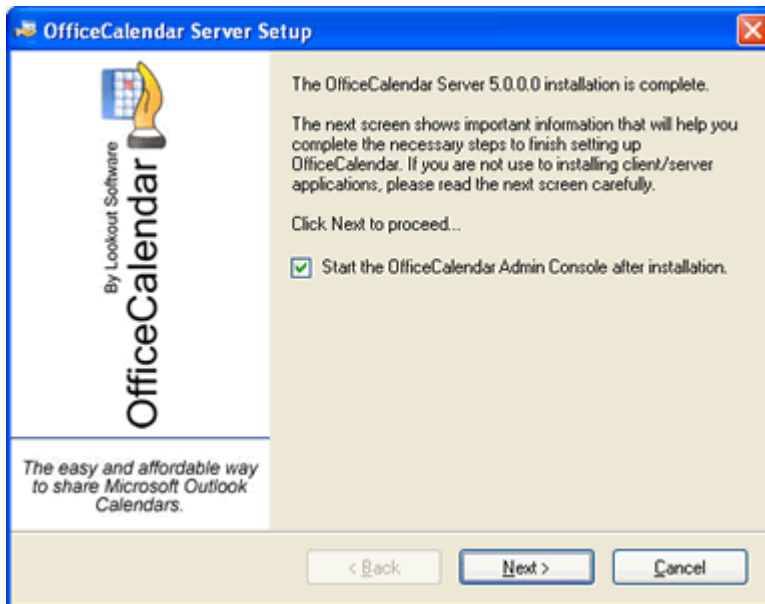
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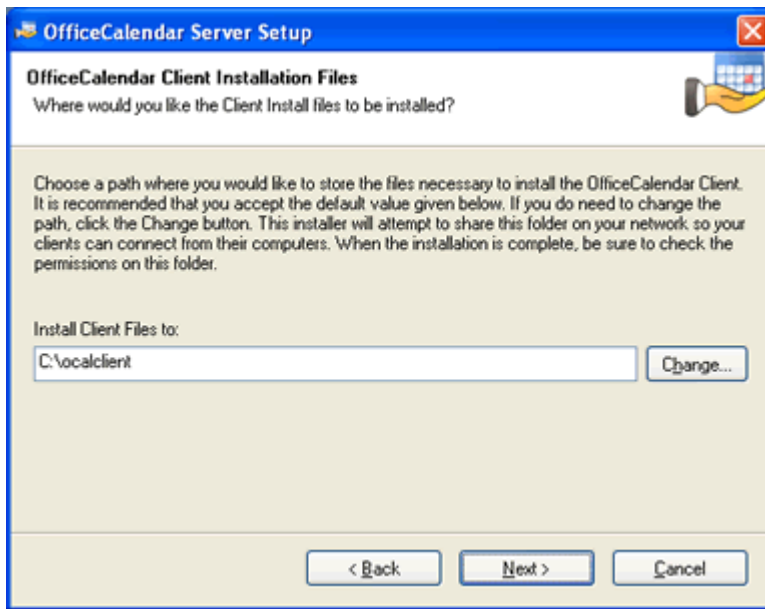
7. Please read the OfficeCalendar license agreement; click the *I agree to the terms of this license agreement* radio button; and click **Next**.
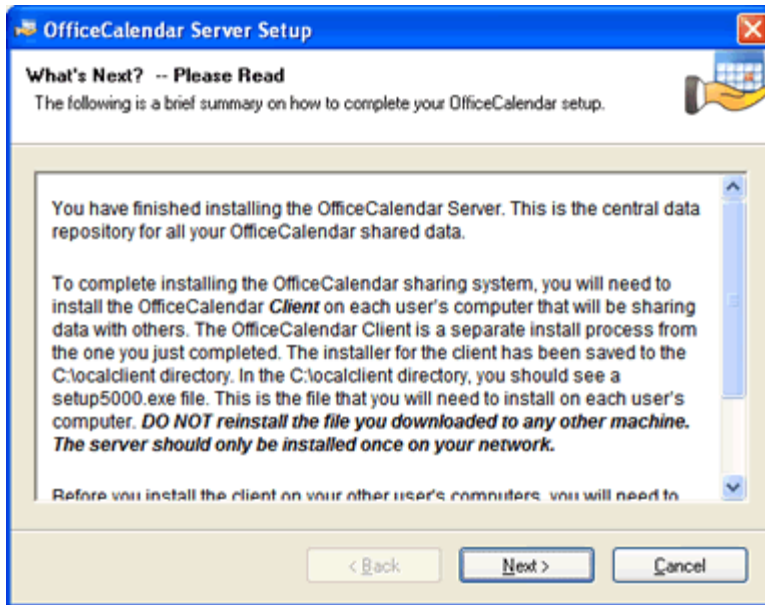

8. From the **Ready to Install** dialog box; click **Next**.

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 18* if you chose not to install the OfficeCalendar Client software on this computer. See below if further explanation of this screen if needed.
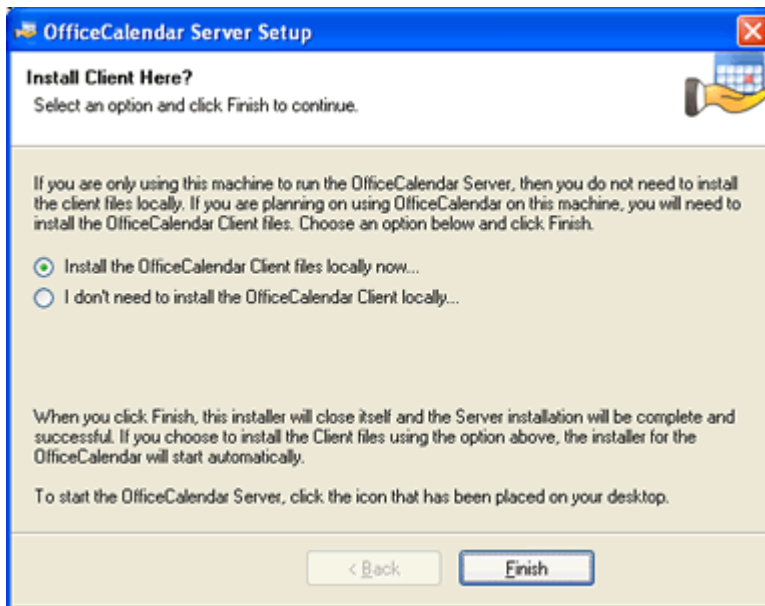
Install Client Here?

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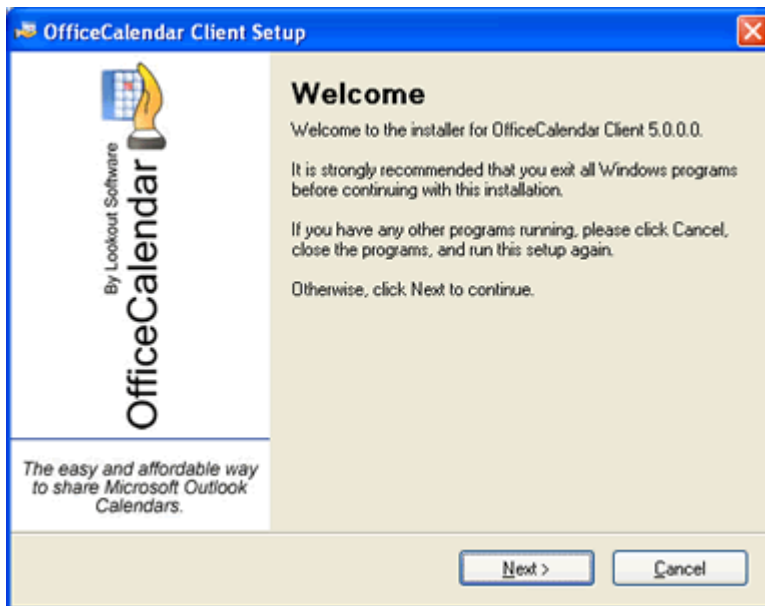
locally now… option if someone is using Microsoft Outlook on this computer and wants to share Outlook information with other users.
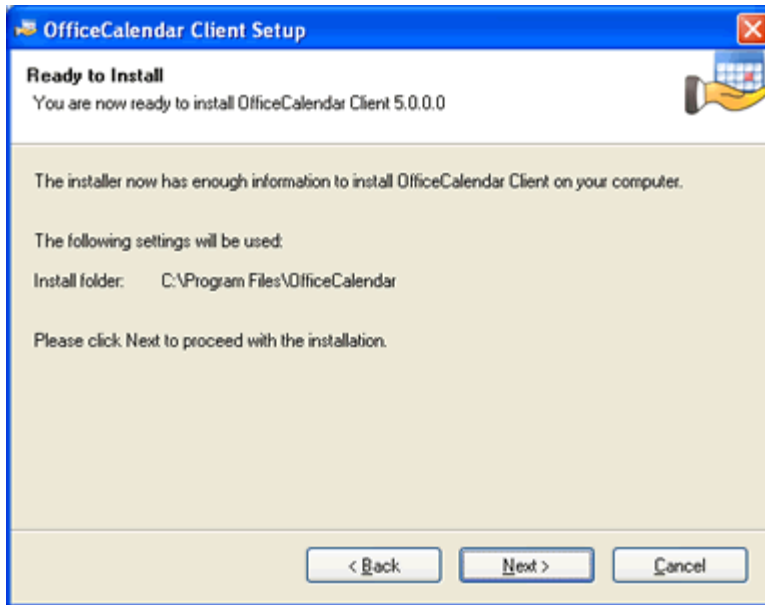
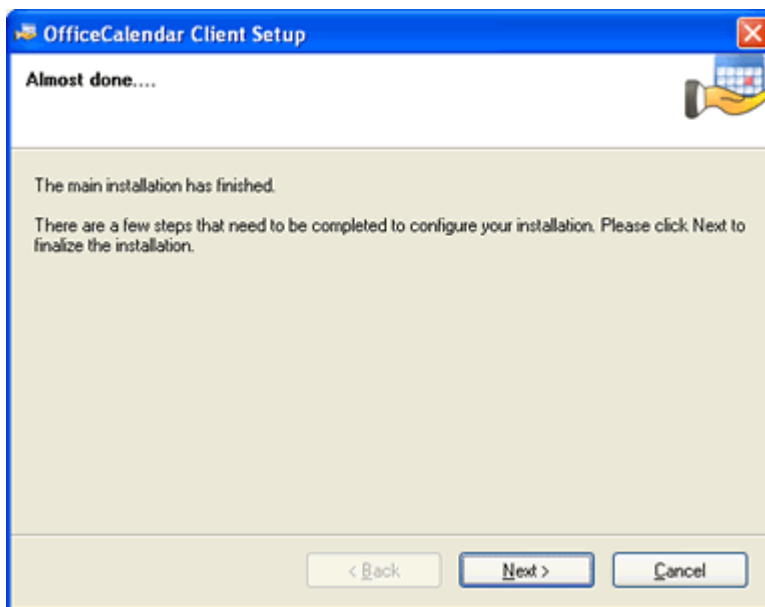12. From the OfficeCalendar Client Setup **Welcome** screen, click **Next**.

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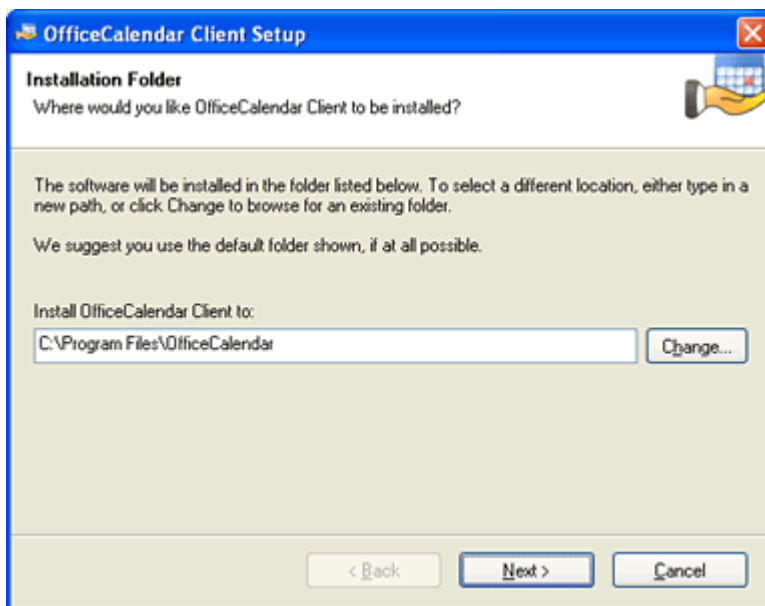
14. From the OfficeCalendar Client Setup **Ready to Install** screen, click **Next**.

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.

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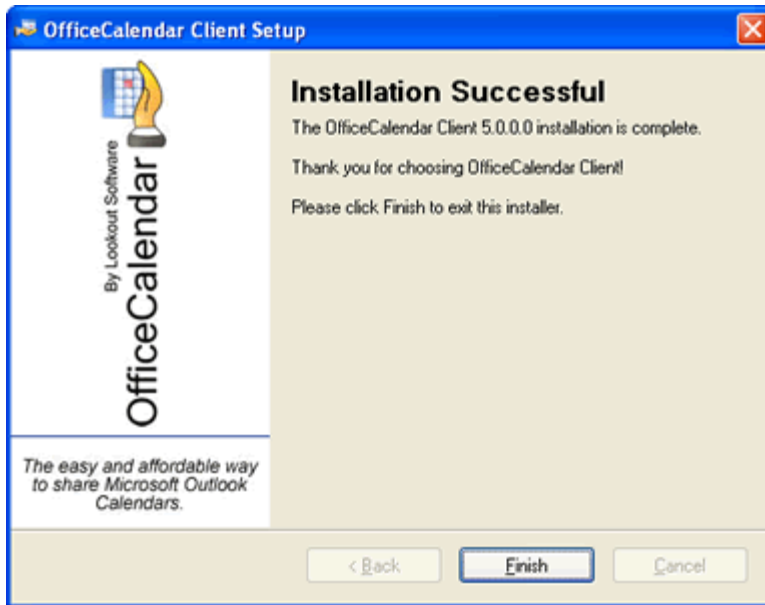
17. You will now see the registration screens for OfficeCalendar Online once your OfficeCalendar installation is complete. Please read the OfficeCalendar Online license agreement; click **I agree to the terms of this license agreement** radio button. Then click **Continue**.

OfficeCalendar Registration

View Outlook folders over the web!

OfficeCalendar Online (web access to Outlook folders) is available free to all OfficeCalendar Premium Maintenance Plan subscribers and OfficeCalendar Free Trial Support participants.

Enter your login credentials to activate OfficeCalendar Online.

License Agreement

Master Subscription Agreement
TERMS OF USE OF OFFICECALENDAR ONLINE:
BY CLICKING THE CHECKBOX DISPLAYED
BELOW, YOU ("YOU" AND/OR "YOUR") AGREE TO
THE FOLLOWING TERMS AND CONDITIONS (THE
"AGREEMENT") GOVERNING YOUR USE OF
OFFICECALENDAR ONLINE (THE "SERVICE"),
USED IN CONJUNCTION WITH THE
OFFICECALENDAR SOFTWARE PRODUCT
("OFFICECALENDAR"), PROVIDED BY LOOKOUT
SOFTWARE LLC ("COMPANY"). IF YOU ARE
ENTERING INTO THIS AGREEMENT ON BEHALF
OF A COMPANY OR OTHER LEGAL ENTITY, YOU
REPRESENT THAT YOU HAVE THE AUTHORITY
TO BIND SUCH ENTITY TO THESE TERMS AND
CONDITIONS, IN WHICH CASE THE TERMS
"YOU" OR "YOUR" SHALL REFER TO SUCH
ENTITY. IF YOU DO NOT HAVE SUCH
AUTHORITY, OR IF YOU DO NOT AGREE WITH
THESE TERMS AND CONDITIONS, YOU SHOULD
NOT CHECK THE BOX DISPLAYED BELOW AND
YOU MAY NOT USE THE SERVICE.

Welcome

☑ I agree to the terms of this license agreement
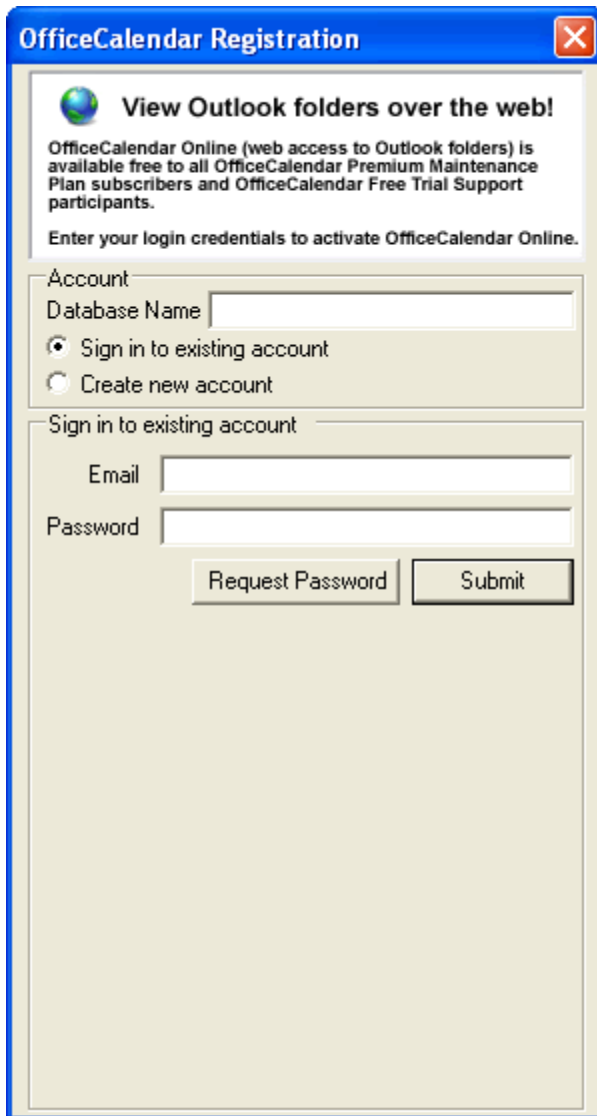
Cancel   Continue

18. OfficeCalendar Online is an optional feature that allows OfficeCalendar users to access their Outlook shared calendars, contacts and tasks online while away from the office. OfficeCalendar Online is free to use during the OfficeCalendar trial period, and we encourage all trial users to test this feature. Please follow the steps for the option most appropriate for you:

   a) *If you previously registered your information online on the OfficeCalendar website for your OfficeCalendar Free Trial Support account after you clicked to download your OfficeCalendar trial*, make sure the **Sign in to existing account** option is selected. Then specify a personalized account database name for your organization's OfficeCalendar Online account (for example, you may want to use your company name or an abbreviation of your company name), and enter in the email address and password that you provided during online registration. Then click **Submit**.

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OfficeCalendar Registration

View Outlook folders over the web!

OfficeCalendar Online (web access to Outlook folders) is available free to all OfficeCalendar Premium Maintenance Plan subscribers and OfficeCalendar Free Trial Support participants.

Enter your login credentials to activate OfficeCalendar Online.

Account
Database Name [   ]
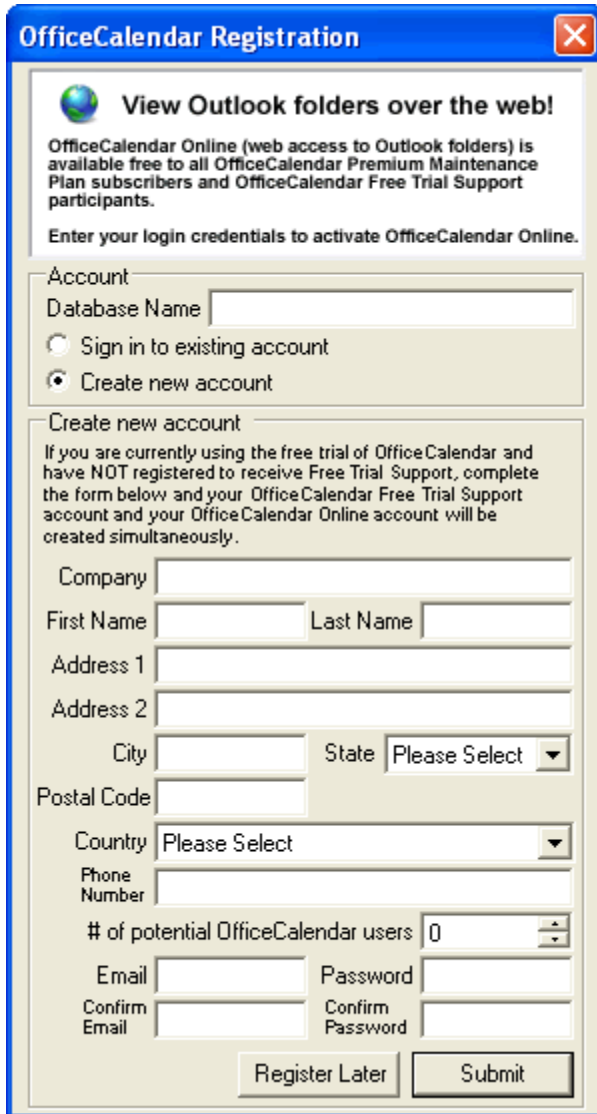(•) Sign in to existing account
( ) Create new account

Sign in to existing account
Email [   ]
Password [   ]

[Request Password]   [Submit]

b) *If you did not register online for your OfficeCalendar Free Trial Support account while downloading your OfficeCalendar trial*, you can register now for both free trial support and your organization's OfficeCalendar Online trial account. Make sure the option for **Create new account** is selected, and enter in a personalized database account name (for example, you may want to use your company name or an abbreviation of your company name) and your registration information. Then click **Submit**.

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c) *If you do not wish to register for OfficeCalendar Free Trial Support or an OfficeCalendar Online trial account*, click **Register Later**. You will have the opportunity to sign up for these accounts at any time via the OfficeCalendar Administration Console (see screenshot below).
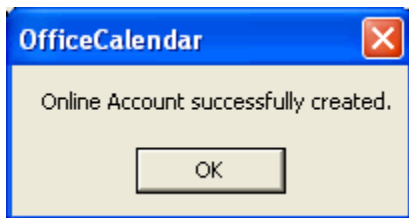

19. If you followed step 18a or 18b, you will see a popup notifying you that your organization's OfficeCalendar Online account has been created.

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Adding User Accounts to the OfficeCalendar Server

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

1. Open the OfficeCalendar Administration Console by clicking on the **OfficeCalendar Admin** icon.

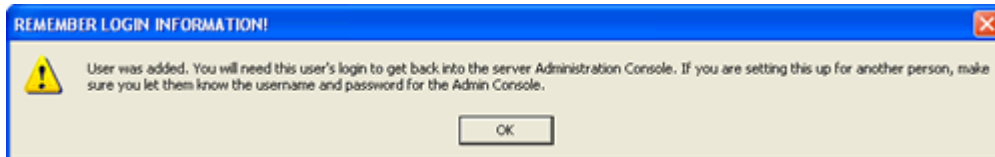2. The **OfficeCalendar Administration Console** screen will appear.
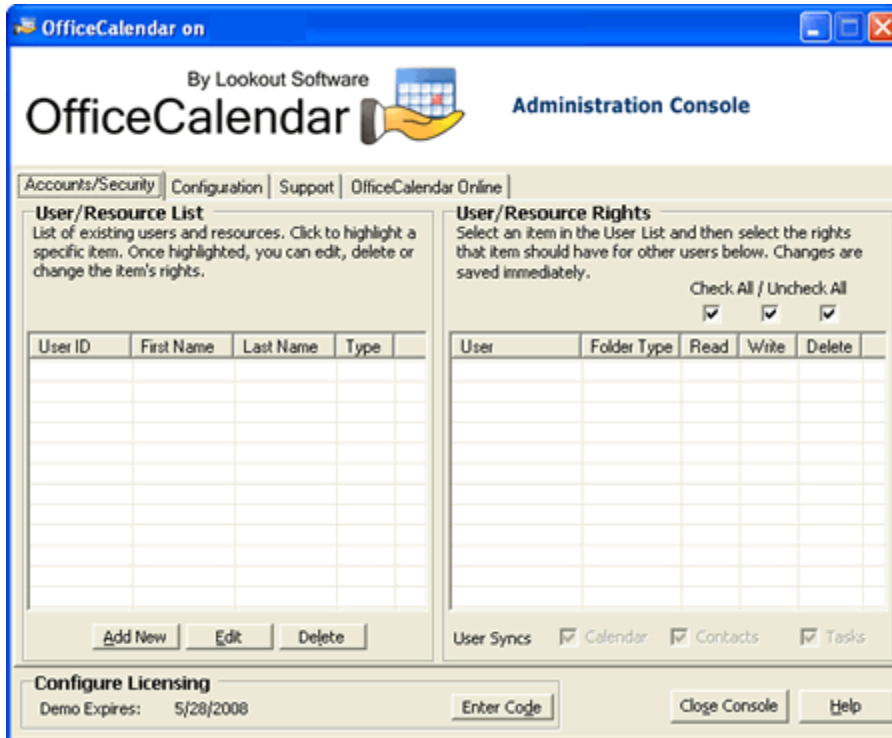
3. From the **OfficeCalendar Administration Console** click the **Add New** button.

4. Enter a **Username**, **Password**, **First name**, **Last name**, and **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. This user will be automatically assigned as the default Administrator. Then assign the default security rights for the user you are adding; and click **Save and New** or **Save and Close**.

5. You will see a screen titled **Remember Login Information!** after saving a new OfficeCalendar administrator. In order to log into the OfficeCalendar Administration console at a later time you will need to remember this username and password – if you are setting up an 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 user accounts, user security rights, etc) need to be assigned as an administrator in OfficeCalendar. However, we do recommend that you have at least two (2) administrators defined in your OfficeCalendar database.

REMEMBER LOGIN INFORMATION!

⚠ User was added. You will need this user's login to get back into the server Administration Console. If you are setting this up for another person, make sure you let them know the username and password for the Admin Console.

OK

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

Quick Tip

Check the **This user is an administrator** check box if the user you are adding will administer the OfficeCalendar Server. At least one user must be an OfficeCalendar Server Administrator, and thus the first user you add must be an OfficeCalendar Server Administrator. You may assign more than one user as an Administrator.

User Details

Username	James
First name	James

Password	*****
Last name	Anderson

Folder Name: Anderson, James

☐ Create user as a resource.   ☑ This user is an administrator.

Existing users can ○ none ○ read ● write ○ delete this user's records.

This user can ○ none ○ read ● write ○ delete existing user's records.

Cancel   Save and New   Save and Close

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Starting and Stopping the OfficeCalendar Windows Service

The OfficeCalendar Server includes two components: the OfficeCalendar Administration Console and the Windows Service (OcalService). With the OfficeCalendar Windows Service running, users will be able to update their shared calendar, contact and task information through synchronizations even if no one is logged into the computer running the OfficeCalendar Server. However, the computer running the OfficeCalendar Server must be turned on for Windows Service to be active.

If, for any reason, you wish to stop the OfficeCalendar Windows Service, you can do so by following these simple steps:

1. On the OfficeCalendar Server PC, click **Start** and go to **Control Panel**.

2. From the menu list, choose **Administrative Tools**, then **Services**.

3. Scroll down and highlight **OcalService**.
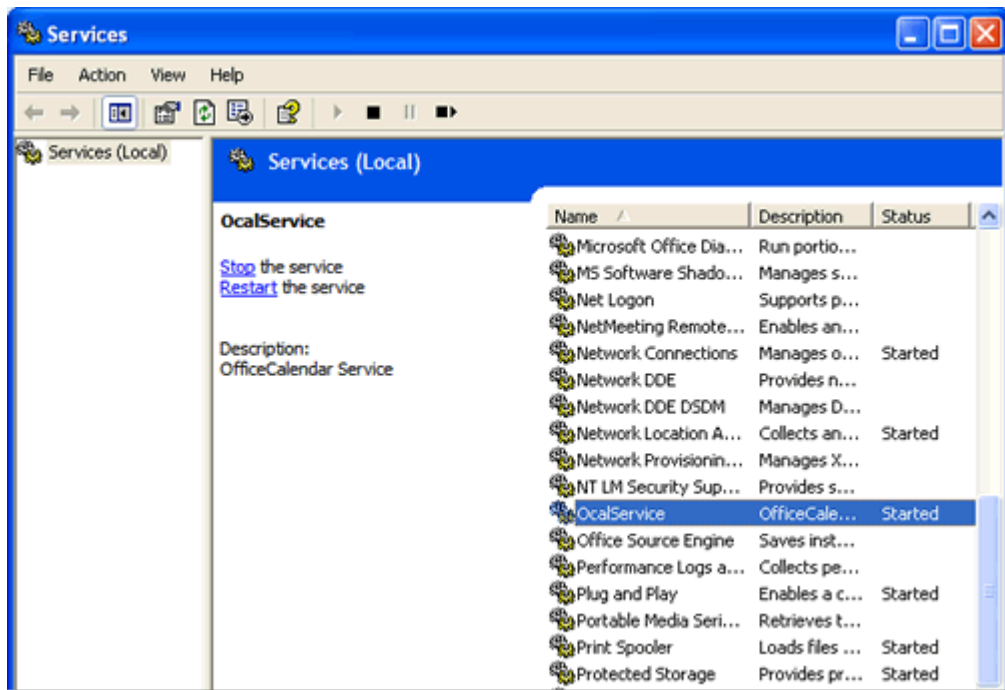
4. On the left hand column, click **Stop the service**.

If the OfficeCalendar Windows Service is stopped, Outlook users will <u>not</u> be able to send and receive shared calendar, contact and task updates. However, having the OfficeCalendar Windows Service stopped will not impede your users' ability to continue using Outlook…they simply won't be able to send and receive (synchronize) with the OfficeCalendar Server until the OfficeCalendar Windows Service is restarted. To restart the OfficeCalendar Windows Service, simply follow the same steps above for stopping the OfficeCalendar Windows Service. However, instead of choosing the option to **Stop** the service, you'll choose the option **Restart**.

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 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.

ocalclient

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.

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ocalclient

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.

Configuring your organization's OfficeCalendar Online account

If you've created an OfficeCalendar Online account for your organization, you'll need to activate the OfficeCalendar Online sync process and configure the OfficeCalendar Online sync settings in the OfficeCalendar Administration Console.

1. Open the OfficeCalendar Administration Console and click on the **OfficeCalendar Online** tab at the top.

2. Click the **Sync Now** button to synchronize all users' information to your organization's OfficeCalendar Online account.

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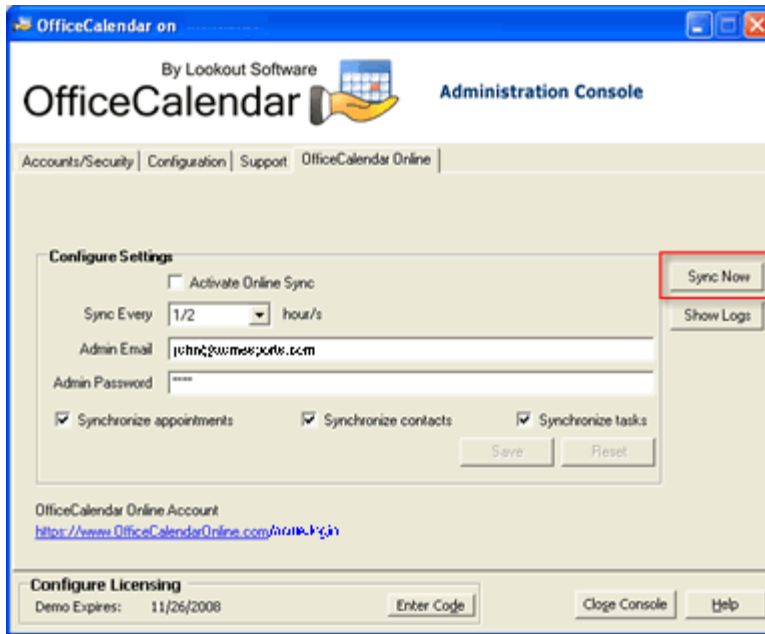
3. A popup dialog will appear notifying you that synchronization with your organization's OfficeCalendar Online account has occurred. Click **OK**.
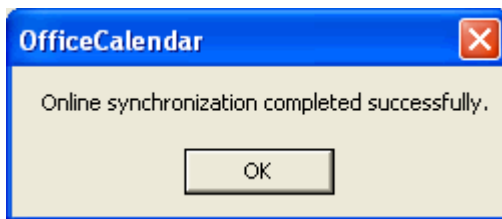
4. You and all other users that have been created in the OfficeCalendar Administration Console can now begin logging into their OfficeCalendar Online account to access their individual and shared Outlook calendar, contact and task folders. You can find your unique login URL to your organization's OfficeCalendar Online account in the **OfficeCalendar Online** tab in the OfficeCalendar Administration Console.
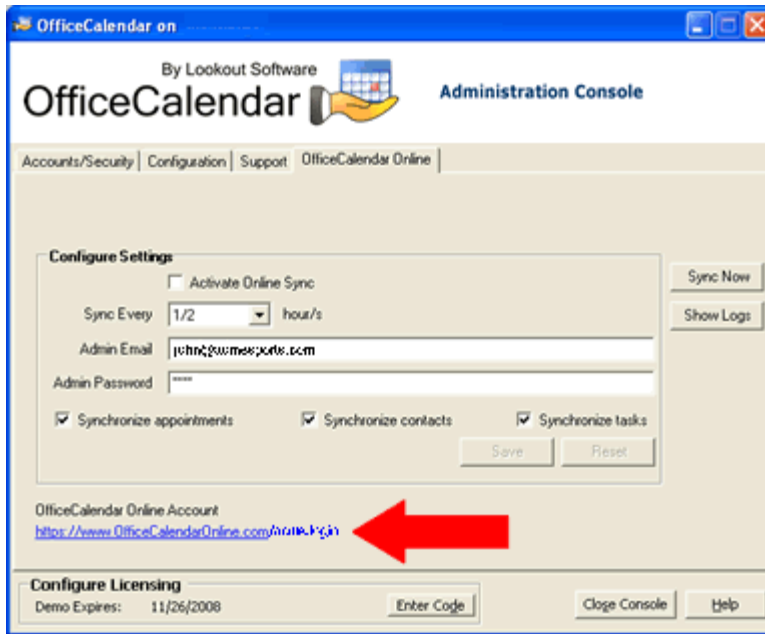
5. To log into your OfficeCalendar Online account, simply browse to your organization's OfficeCalendar Online login URL. Users can log in using the User Name and Password assigned to them in the OfficeCalendar Administration Console. For more information about using OfficeCalendar Online, please refer to the OfficeCalendar Installation and User Guide. You can download the user's guide at http://officecalendar.fileburst.com/documents/ocuserguidev5.pdf if you have not done so already.

NOTE: If a user logs into their OfficeCalendar Online account before syncing their Outlook client information with the OfficeCalendar Server, their online calendar, contact and task folders will at first appear blank. Once the user syncs their Outlook client with the OfficeCalendar Server, their Outlook folder information will appear in OfficeCalendar Online. Calendar information will be available for all future and recurring appointments, and for past appointments up to 30 days prior to the current date.

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

2. Double-click on the **setup5000.exe** icon (show below).
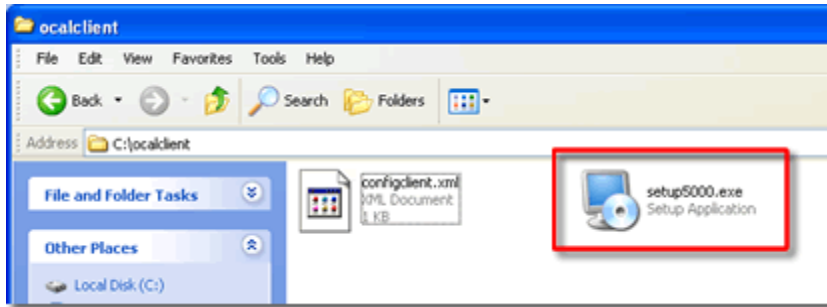
3. From the OfficeCalendar Setup **Welcome** screen, click **Next**.
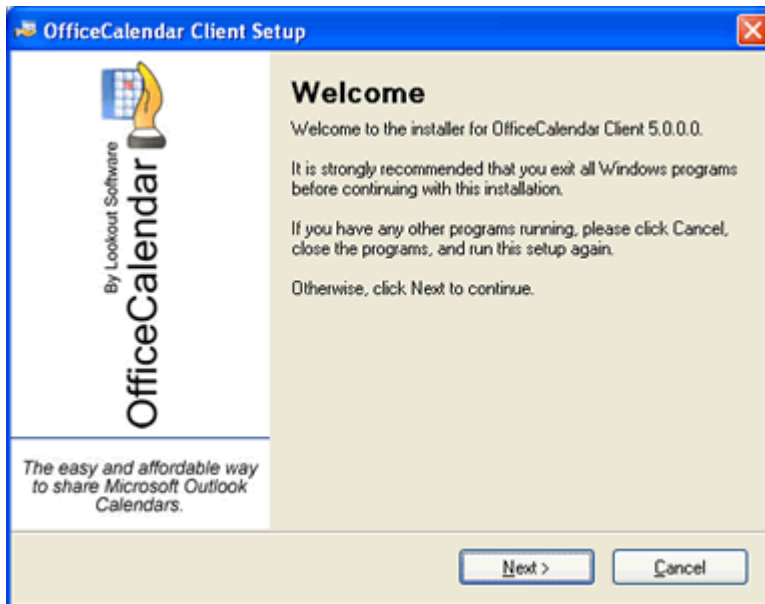
4. If you <u>do not</u> have Microsoft's .NET Framework installed on your computer you will see the screen below – please proceed to *step 4a* below. If you do have the Microsoft .NET Framework installed on your computer you will not see the screen below - please proceed to *step 5*.
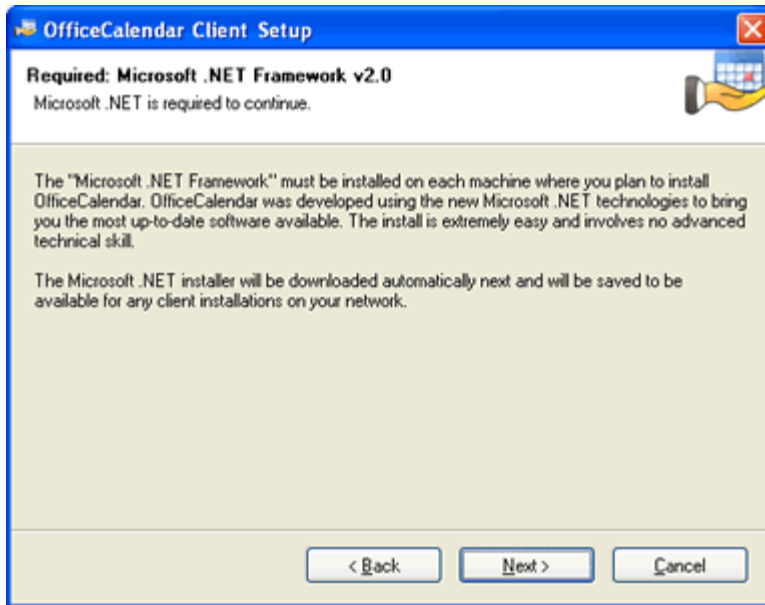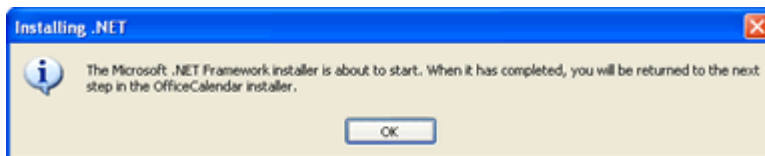
To Install the Microsoft .NET Framework:

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 accept the terms of the License Agreement** check box; and click the **Install** button to proceed.
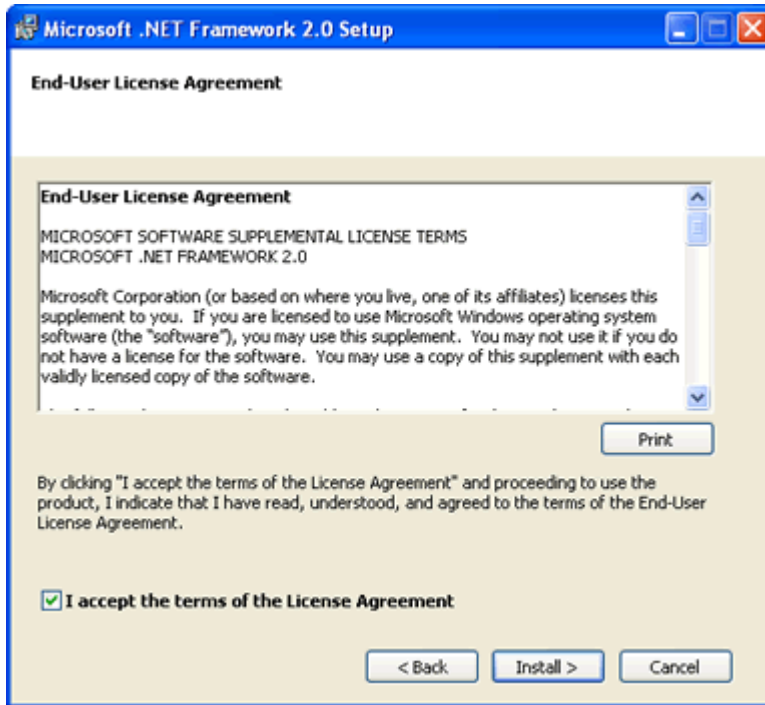
*Please wait while the .NET framework installs...*

d. When the .NET Framework installation is complete you'll see the dialog box below; click **Finish** to return to the OfficeCalendar Client installation process.
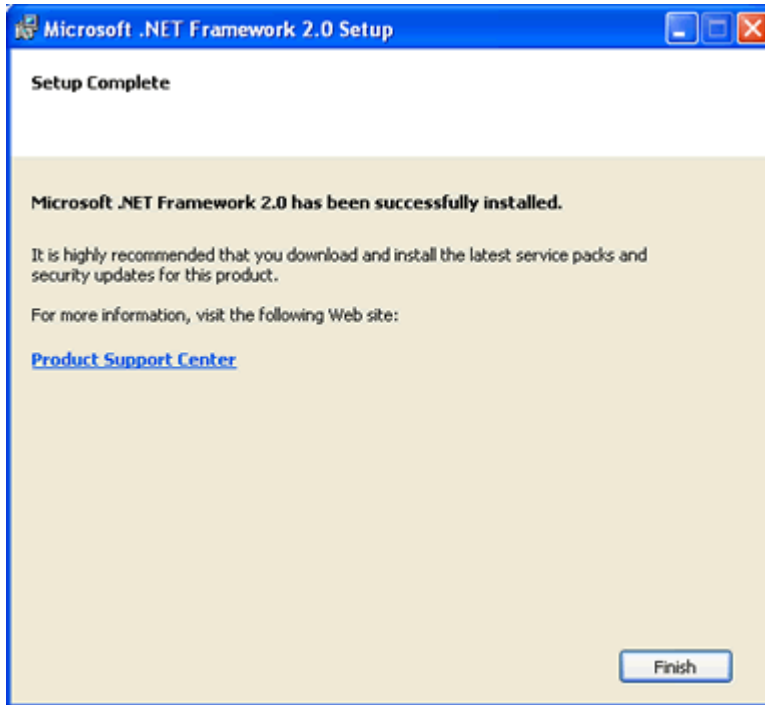
5. Select an installation folder for the OfficeCalendar Client installation (for ease of support we recommend that you choose the default location of C:\Program Files\OfficeCalendar); and click **Next**.
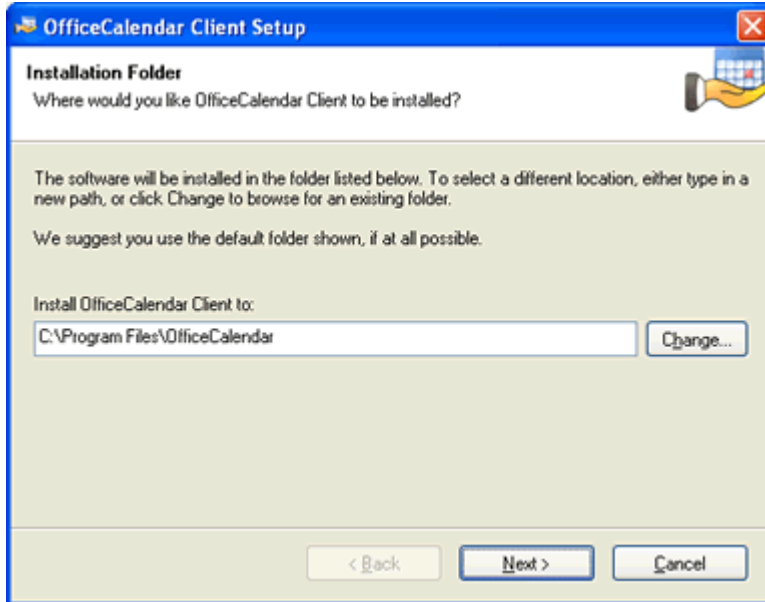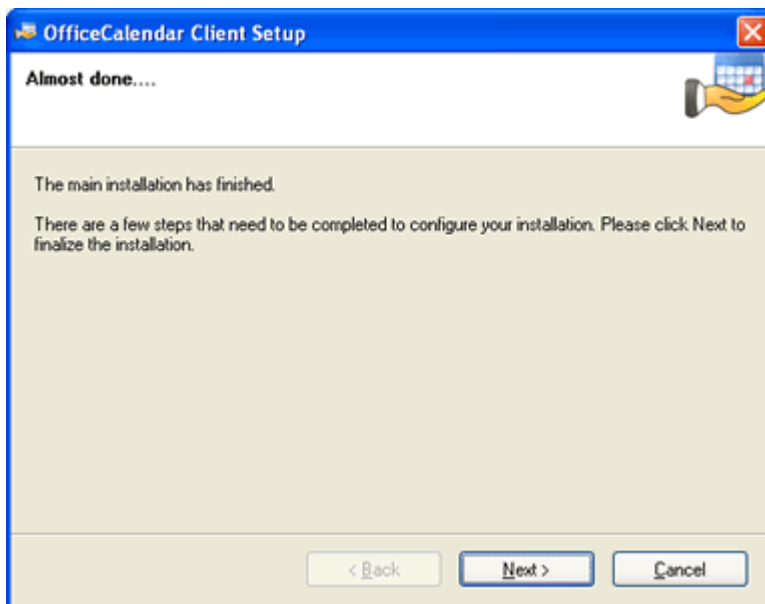

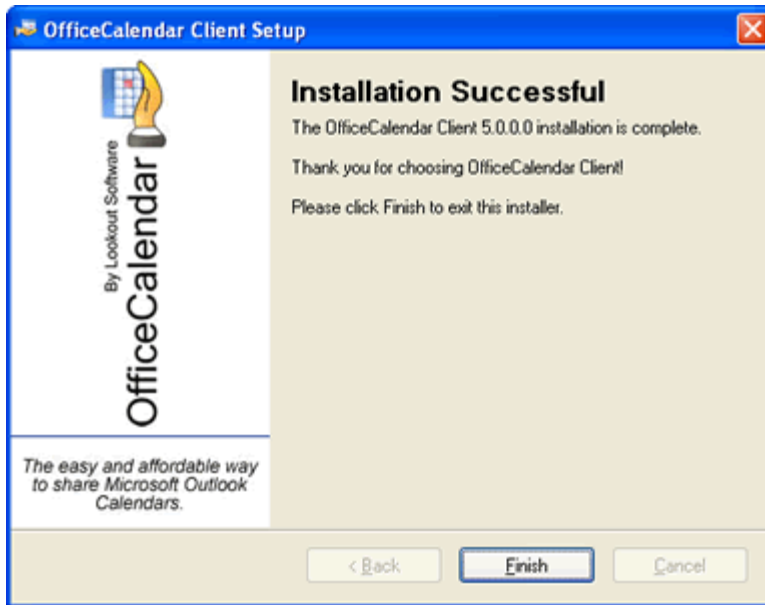6. From the **Ready to Install** screen, click **Next**.
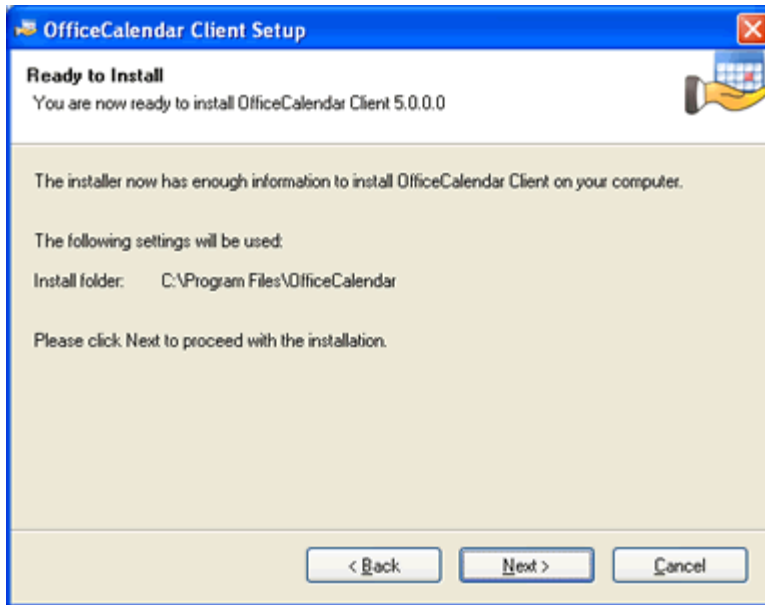
Please wait while the OfficeCalendar Client installs…

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

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

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9. Open Microsoft Outlook on your computer.

The OfficeCalendar Client added the OfficeCalendar toolbar as well as an OfficeCalendar menu option to your Microsoft Outlook toolbar (shown in the illustration below).
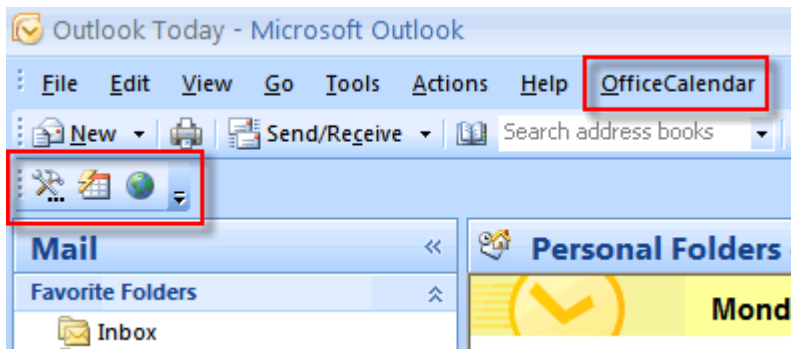
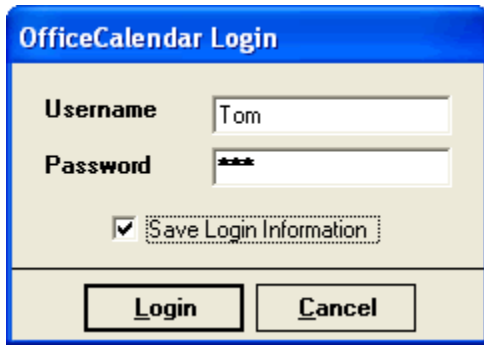Click on the **Synchronize OfficeCalendar** icon.

The **OfficeCalendar Login** dialog box 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.)

OfficeCalendar Login

| Username | Tom |
| Password | *** |

☑ Save Login Information

[**Login**] [**Cancel**]

You'll notice that the synchronization icon will change states to [icon] 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. Also, OfficeCalendar creates a default Group Calendar folder, which will appear under your Calendar folder (shown below).

If you are the first person to synchronize with the OfficeCalendar Server you will only see the group calendars and resource user folder(s) that you have rights to view under your root **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.

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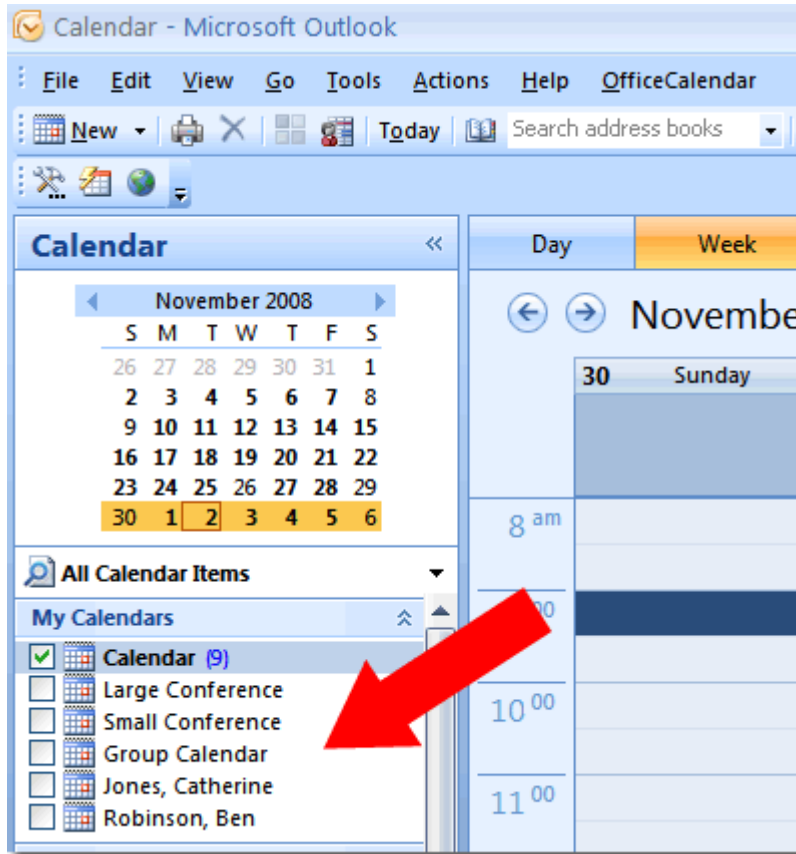
Once other users have synchronized their Outlook data with the OfficeCalendar Server, their folders will appear in your Outlook folder list during your subsequent synchronizations.

Setting up and sharing your Outlook email folders with OfficeCalendar is different than setting up and sharing your Outlook calendar, contact and task folders. OfficeCalendar email sharing uses your Outlook email send/receive synchronization to share your email folders with other users. Please refer to the OfficeCalendar Installation and User's Guide for instructions on setting up, configuring and using OfficeCalendar email sharing.

Getting the most out of your OfficeCalendar Installation

To get the most out of your OfficeCalendar installation, please refer to the detailed OfficeCalendar Installation and User's Guide. You can download the user's guide at http://officecalendar.fileburst.com/documents/ocuserguidev5.pdf if you have not done so already.