

INSTALLATION AND QUICK START GUIDE

OfficeCalendar for Microsoft® Outlook™

Sharing Microsoft Outlook Calendar and Contacts without Exchange Server

Contents

What is OfficeCalendar? Sharing Microsoft Outlook Calendars and More.....	2
OfficeCalendar Installation Overview.....	3
Installing the OfficeCalendar Server.....	4
Adding User Accounts to the OfficeCalendar Server	11
Ensure that the OfficeCalendar Client Installation Folder is shared on your network	13
Installing the OfficeCalendar Add-on Client on Microsoft® Outlook Workstations	14
Getting the most out of your OfficeCalendar Installation.....	19

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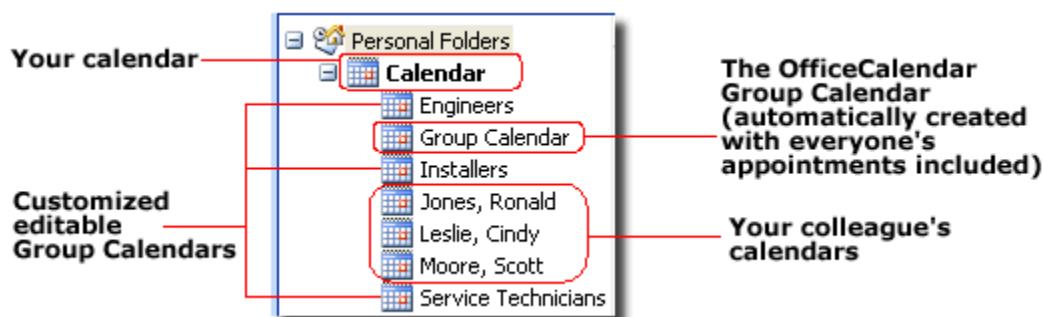
<http://www.officecalendar.com>

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, tasks and email) for each other person that is sharing their Outlook information with you. For example, if you have 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

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2

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:\localclient**. 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.



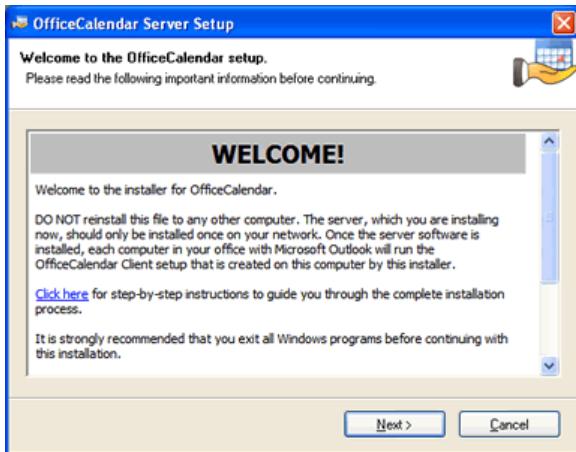
3. From the **Welcome to the OfficeCalendar setup** screen, please note that you will only need to install the "**ocinstall.exe**" file you downloaded once. During the initial setup, the OfficeCalendar Server installer will create a shared network folder which will be used to install the OfficeCalendar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

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4



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 .NET installation prompt -- please proceed to *step 5*.

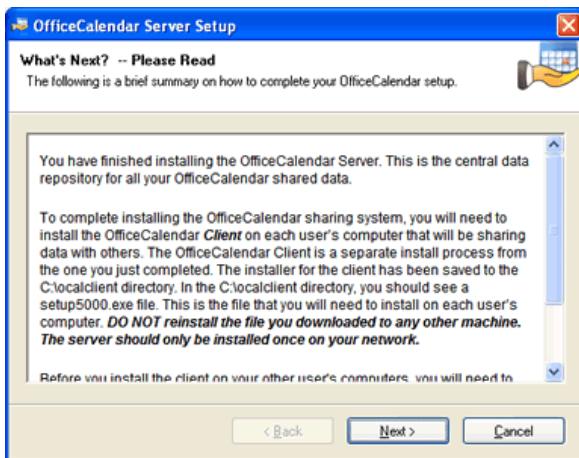
To install the Microsoft .NET Framework:

- 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. From the **Installation Folder** dialog box 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. From the **OfficeCalendar Client Installation Files dialog** box select an installation folder for the OfficeCalendar Client installation files (for ease of support we recommend that you choose the default location of **C:\localclient**), and click **Next**.
7. From the License Agreement dialog box 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**.

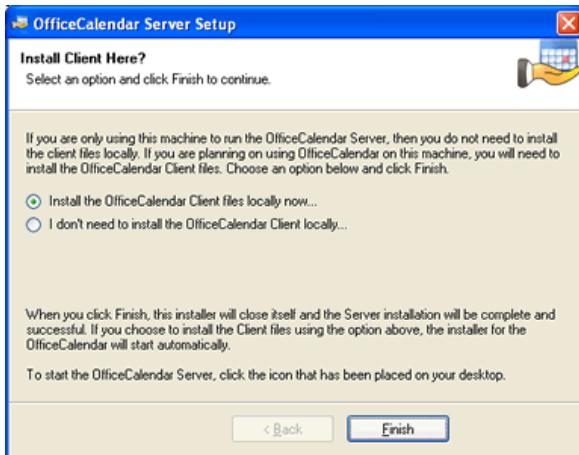
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10. The **What's Next** screen briefly describes the steps you'll need to perform after installing the OfficeCalendar Server. Please take a minute to read through the **What's Next** screen text, and click **Next**.



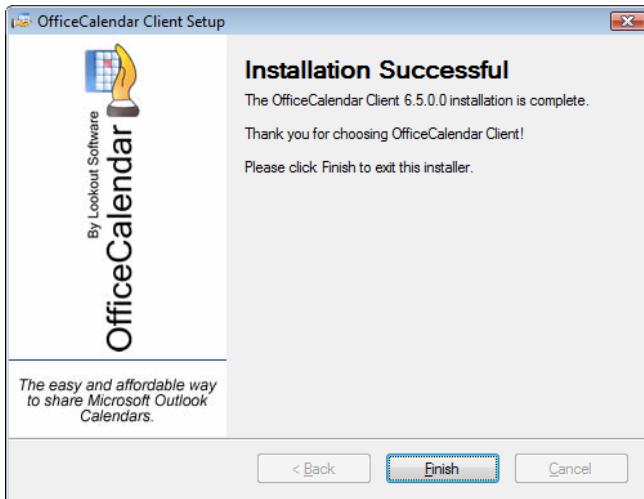
11. From the **Install Client Here?** screen, choose whether or not you want to install the OfficeCalendar Client software on this computer, and click **Finish**. Proceed to step 12 if you chose to install the OfficeCalendar Client software on this computer. Proceed to the topic "**Adding User Accounts 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.



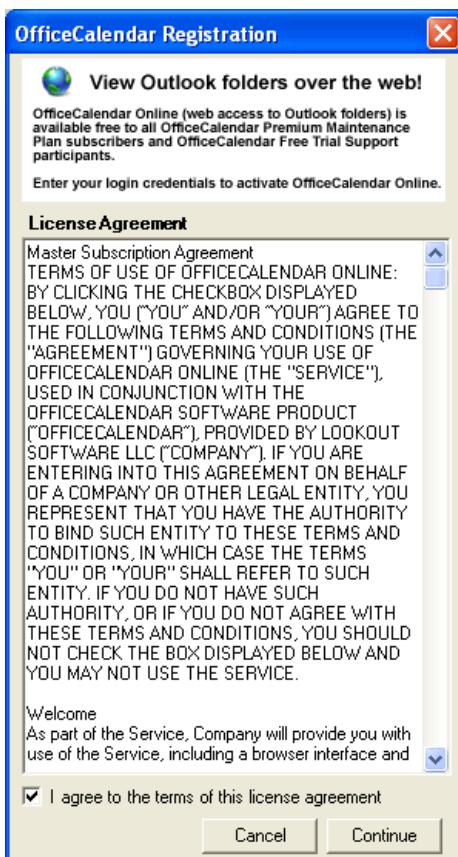
Install Client Here?

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.



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**.

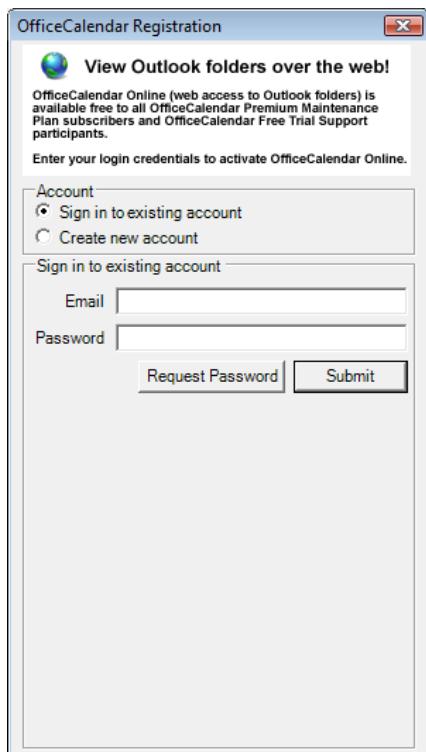


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18. OfficeCalendar Online is an optional feature that allows OfficeCalendar users to access and edit their Outlook shared calendars, contacts and tasks online while away from the office. OfficeCalendar Online is free to use during the OfficeCalendar 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 for OfficeCalendar Online account, make sure the **Sign in to existing account** option is selected. Then enter in the email address and password that you provided during your registration. Then click **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 your registration information. Then click **Submit**.

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9

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
 Sign in to existing account
 Create new account

Create new account
 If you are currently using the free trial of OfficeCalendar and have NOT registered to receive Free Trial Support, complete the form below and your OfficeCalendar Free Trial Support account and your OfficeCalendar Online account will be created simultaneously.

Company:

First Name: Last Name:

Address 1:

Address 2:

City: State:

Postal Code:

Country:

Phone Number:

of potential OfficeCalendar user:

Email: Password:

Confirm Email: Confirm Password:

- c) Upon submitting your OfficeCalendar Online registration information you will be asked a unique name for your organization's OfficeCalendar Online account. Enter a unique name (most people use their company name or initials assuming it's available); and click Submit.

Generate your OfficeCalendar Online Link

You are allowed up to 100 characters.
 You may only enter letters, numbers and underscores.

.login

- d) 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 simultaneously at any time by clicking the **Register Free Trial** button in the OfficeCalendar Administration Console (see screenshot below).

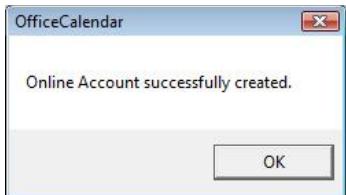


19. If you followed step 18a or 18b, you will see a popup notifying you that your organization's OfficeCalendar Online account has been created.

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10



For further details or to learn more about using OfficeCalendar Online and OfficeCalendar Calendar Mobile for BlackBerry [click here for instructions on how to use OfficeCalendar Online](#).

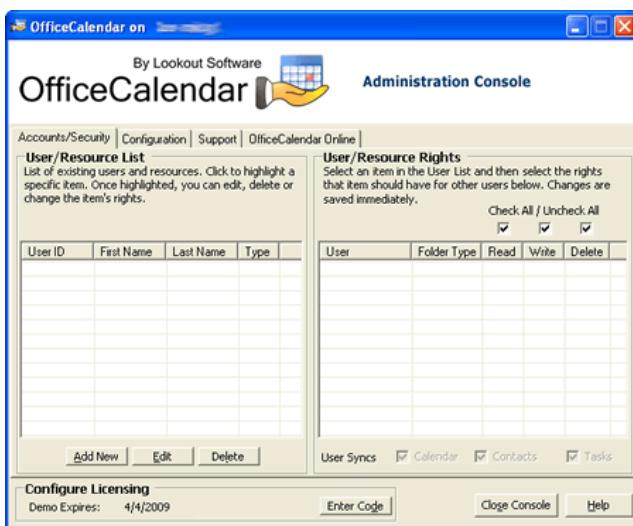
Adding User Accounts to the OfficeCalendar Server

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.



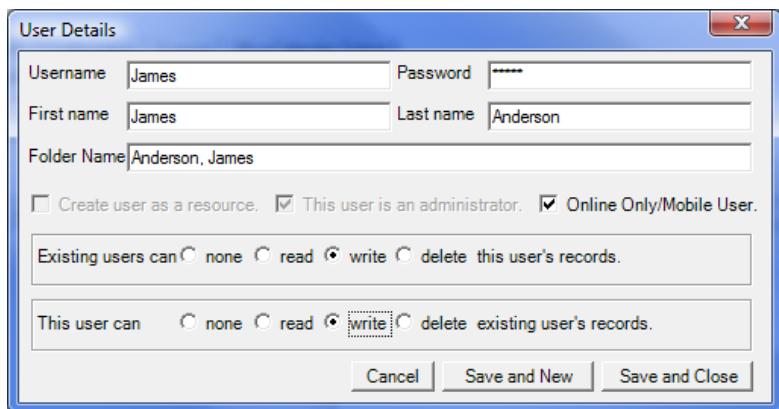
3. From the **OfficeCalendar Administration Console** click the **Add New** button.



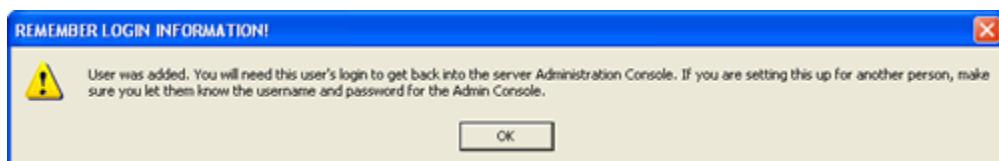
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4. Enter a **Username**, **Password**, **First name**, **Last name**, and **Folder Name** (this is what will be displayed in other people's Outlook folder list) for the first user you wish to add to OfficeCalendar. This user will be automatically assigned 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**.

Also, if the user you are currently adding will be syncing his/her BlackBerry device via OfficeCalendar Online; or if they will exclusively use OfficeCalendar Online because they do not have a copy of Microsoft Outlook please check the **Online Only/Mobile User** checkbox. This helps OfficeCalendar with special administrative functions.



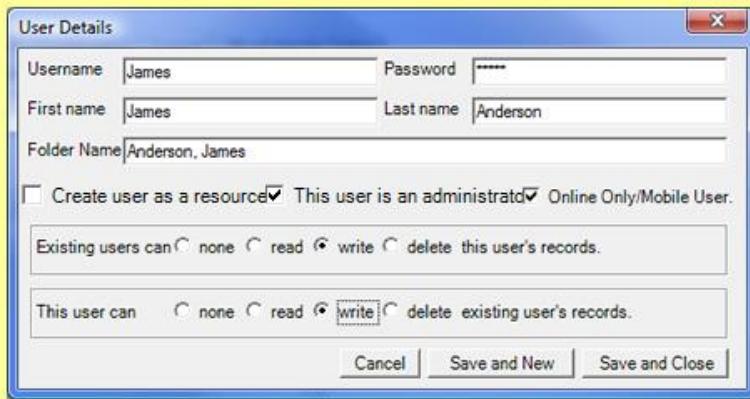
5. You will see a screen titled **Remember Login Information!** after saving a new OfficeCalendar administrator. In order to log into the OfficeCalendar Administration console at a later time you will need to remember this username and password – if you are setting up an administrator account for another 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.



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

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 added always has this box checked. You may assign more than one user as an Administrator.



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.



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.

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13

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.



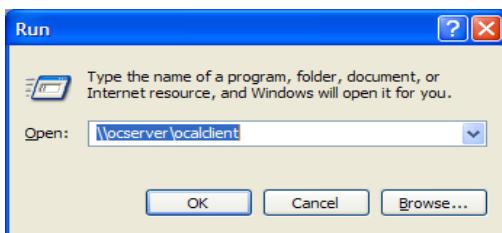
Quick Tip

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 **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, “**ocservr**” is the OfficeCalendar Server’s computer name.)



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14

Quick Tip

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

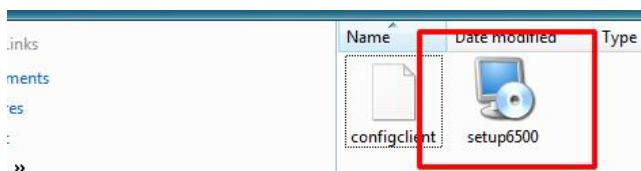
If you do not know the name of the computer where your OfficeCalendar Server is running simply open the OfficeCalendar Server program on that computer. Open the OfficeCalendar Server program by right-clicking on the OfficeCalendar Server icon (shown below) in the task tray and selecting **Show Admin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



2. Double-click on the **setup6500** icon (show below).



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



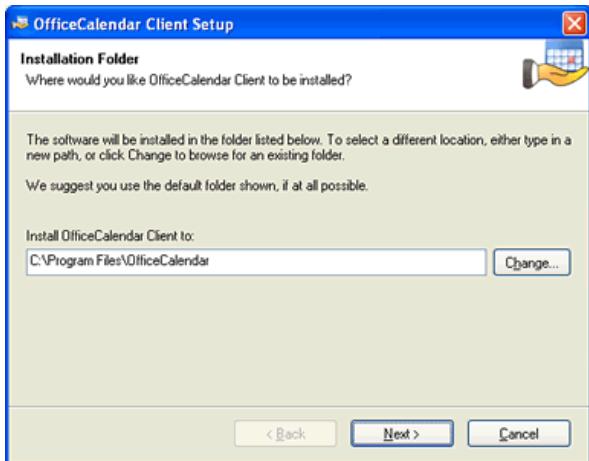
4. If you do not have Microsoft's .NET Framework installed on your computer you will see the screen below – please proceed to *step 4a* below. If you do have the Microsoft .NET Framework installed on your computer you will not see .NET installation prompt -- please proceed to *step 5*.

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

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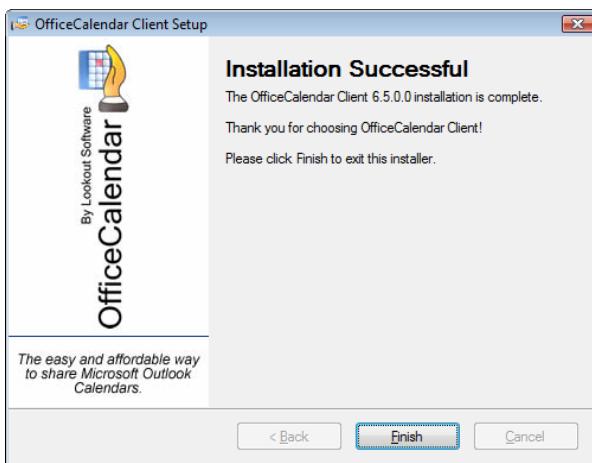
16



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.



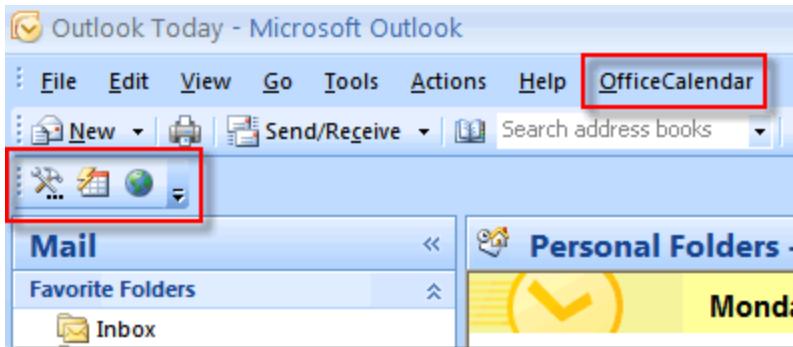
9. Open Microsoft Outlook on your computer.

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

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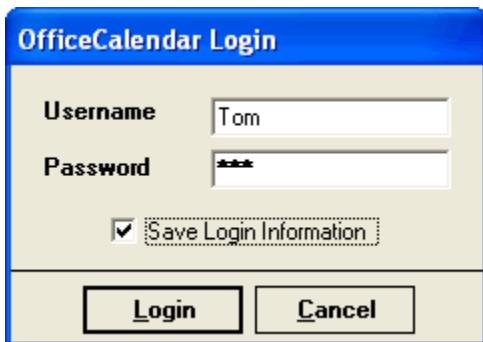
17



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.)



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. 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

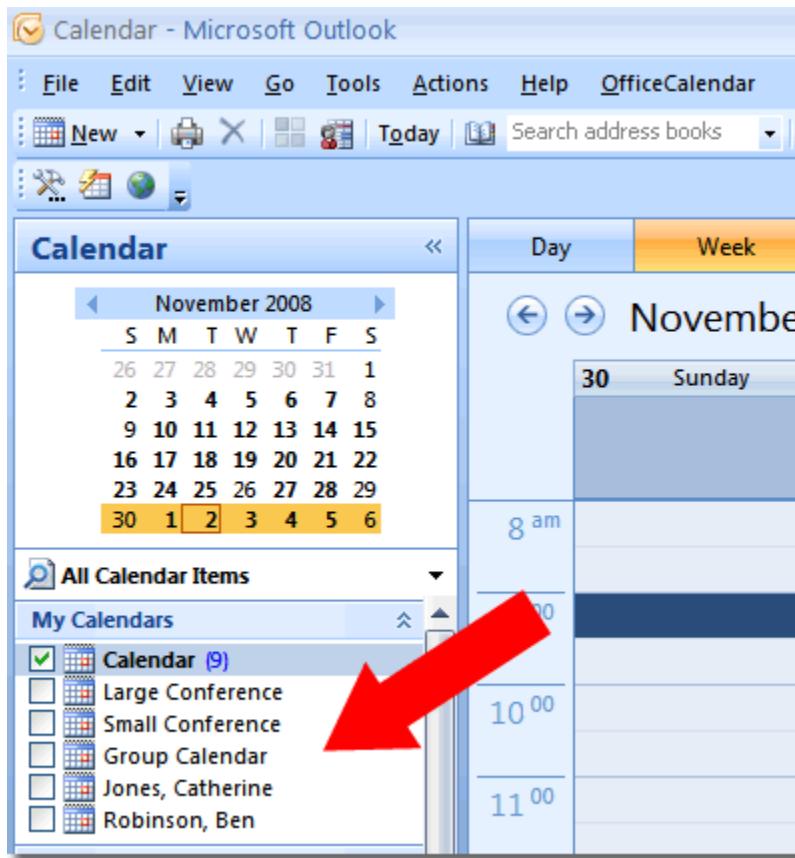
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18

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.



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/ocuserguidev65.pdf> if you have not done so already.

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19