

INSTALLATION AND QUICK START GUIDE

OfficeCalendar for Microsoft® Outlook™

Sharing Microsoft Outlook Calendar and Contacts without Exchange Server

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"Sharing Microsoft Outlook Calendar and Contacts without Exchange Server"

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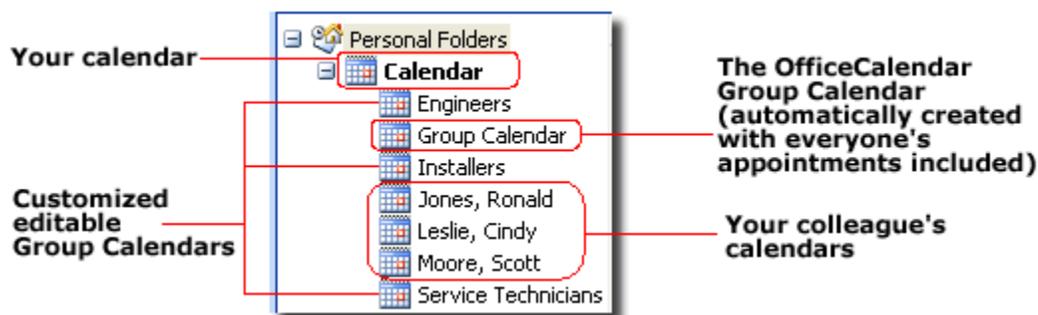
<http://www.officecalendar.com>

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.

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 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 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

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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

Things to consider when downloading OfficeCalendar

1. You can choose to run the OfficeCalendar Server app on our servers using **OfficeCalendar On Demand**, or you can install it locally on one of your PCs/Servers. If installing locally, please note that OfficeCalendar does not require a network to run. You can share your Outlook data using an internet connection. You can view our knowledge base article on setting this up by clicking here <http://officecalendar.crmdesk.com/answer.aspx?id=4>
2. OfficeCalendar has a Client/Server architecture, meaning that multiple Outlook Clients communicate via 1 central Server app. You should run only 1 Server app, therefore, do not download the trial onto each workstation. Either sign up for OfficeCalendar On Demand, or download 1 trial to the machine that is going to run the OfficeCalendar Server application.
3. The OfficeCalendar Server app does not require an actual server machine to run. You can run the Server app on any PC, including a PC that will also run the OfficeCalendar Client app. The Server app does not require Outlook to be present on the machine where it is installed.
4. If installing locally, you will download only 1 trial installation file, and it will be to the machine where you are going to run the OfficeCalendar Server app. This download contains everything you need to install, set up and use OfficeCalendar.
5. The trial version is the full product, with absolutely no feature limitations. The OfficeCalendar Server will stop syncing in 14 days from the date of installation. If it expires, you will not lose any Outlook data. After purchasing, a keycode can be generated from our website that will license your installation permanently.

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>.

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



ocinstall.exe

3. Please choose which installation/setup you would like to run. The OfficeCalendar Sever can be run on our Servers via **OfficeCalendar On Demand [EASIEST]**, or you can choose to run it locally [**EASY**].



If you choose to use **OfficeCalendar On Demand**, once you click **Install on OfficeCalendar's server**, you will be presented with a form. Once the form is completed, you will automatically receive an Account Activation email with further instructions. Please follow those instructions and then skip to step #7.

4. During the installation, you will be prompted to choose the **Default** or **Advanced installation**. We recommend that our users choose the Default installation. This makes it easier to troubleshoot issues later on.
5. Click **NEXT** when prompted during the installation.

OfficeCalendar requires Microsoft.Net Framework V2.0 or higher be installed on any machine running the OfficeCalendar Server or Client apps. The installer will auto detect if you do not have the required installation and prompt to you install the proper version. Please follow the instructions on the screen if prompted for this.

6. At the end of the installation, you will be given the option to **Install Client files locally now**. Choose this option if this machine has Outlook installed and will be used as an OfficeCalendar Client. Otherwise, choose **I don't need to install the OfficeCalendar Client files locally**.

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7. After you are finished, you will now see the Setup Wizard. The OfficeCalendar Admin Console will be open in a window behind it, but please proceed with using the Setup Wizard to configure your new OfficeCalendar Server installation. NOTE: OfficeCalendar On Demand Users will not see all the steps included in the Setup Wizard because some were completed during the Account activation process.



- a. **Administrator:** enter the information for each user who will have rights to log into the Admin Console. You must have at least one Administrator, so by default, the first User ID you enter will be an Administrator. This can be changed later.
- b. **Users:** each Outlook user, or Online/Mobile user, will need a User ID. Only select Online/Mobile User if this user does NOT have Outlook.
- c. **Resource Folders:** enter a folder name, and select a folder type, here when you need to create a shared calendar/contact/task folder in Outlook. OfficeCalendar will create a blank folder on its first sync.
- d. **Security:** assign permissions for your users by selecting each user from the drop down menu on the left, and then checking what permissions they should have to the other user's Outlook folders.
- e. **Online Database:** this screen will walk you through setting up your OfficeCalendar Online account, so your users can have secure web access to their Outlook data from anywhere in the world.
- f. **Email Users:** enter each user's email address and OfficeCalendar will email them simple to follow instructions for installing and setting up the OfficeCalendar Client. If you do not have a way to email from the server machine, you can skip this step. Client installation instructions are included below.
- g. **Admin Document:** this document contains all your critical setup information (User IDs, passwords, etc...) for reference later. You can choose to Save or Print the document. Anytime you make changes to the critical information in your OfficeCalendar Admin Console, you will be prompted to Save or Print a new Admin Document.

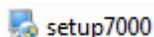
Install the OfficeCalendar Client add-in for Outlook

1. If you chose to include the email addresses for your users when prompted by the Setup Wizard, then please refer to the set of instructions that was emailed to them.
2. If you installed the OfficeCalendar Server locally, and chose not to email instructions to each of your clients, please do the following:

- a. Browse from the each client to the folder on the server machine that contains the OfficeCalendar client installation file by doing the following Start > Run > [\\SERVERNAME\OCALCLIENT](#). If you don't have "Run" as an option, just type the same network path in the "Search Programs and Files" field. The SERVERNAME is the computer name of the machine where you have installed the OfficeCalendar Server and is listed in your Admin Document (also, you can right click *Computer > Properties > Computer Name*)

If you receive a windows message stating that it cannot find the path, please check to make sure you've typed the path correctly, are using the proper server name, and that you are networked with the server machine.

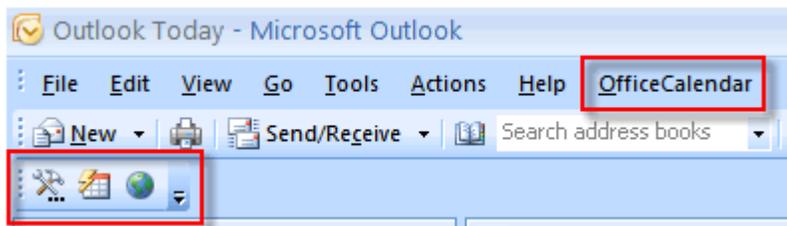
- b. Double click the client installation file **Setup7000** to launch the Client installer and click **Finish** when prompted.



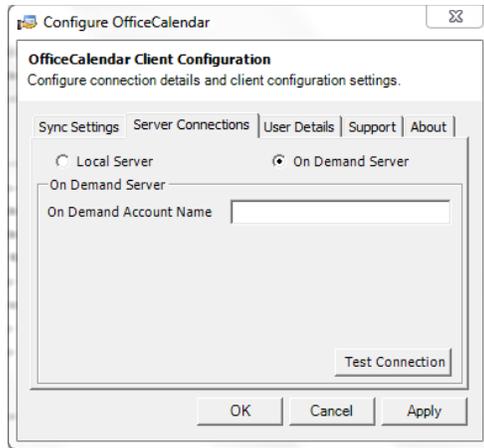
- c. If you are using **OfficeCalendar On Demand**, and chose not to email instructions to each of your clients, please do the following:
 - i. Click the following link <http://officecalendar.fileburst.com/cfull/setup7000.exe> and then double click the Setup7000 file to launch the Client installer. Click **Finish** when prompted

3. Open Microsoft Outlook on your computer.

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



- i. If using **OfficeCalendar On Demand**, you will need to configure your OfficeCalendar Client to sync with your account, so please click the OfficeCalendar Client Configuration button (hammer & wrench) > Server Connections tab.

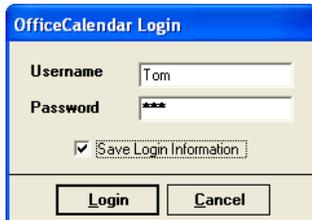


- ii. Enter your **OfficeCalendar On Demand** Account name in the proper field, and then click **Test Connection** to make sure everything is configured correctly. If the test comes back successful, click **OK**. If the test fails, please check your On Demand Account Name and try again.

- b. Now 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.)



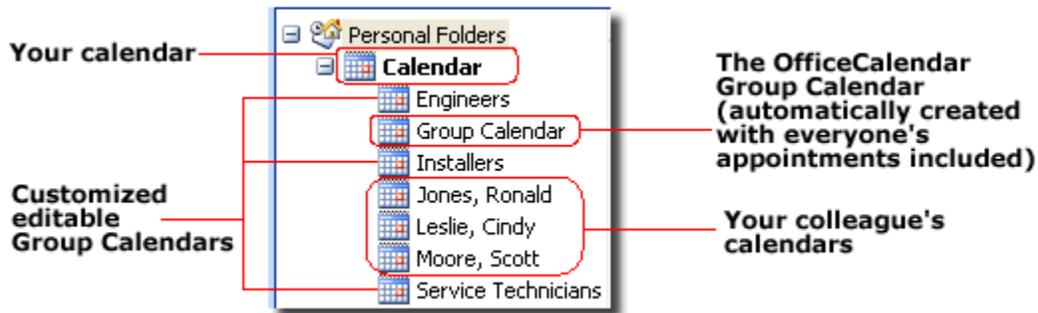
You'll notice that the synchronization icon will change states to  while your Outlook is synchronizing with the OfficeCalendar Server. Once the synchronization is complete it will change back to its original state.

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

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Group Calendar folder, which will appear under your Calendar folder (shown below). **To see your Folder List, in Outlook click *Go > Folder List***

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.



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/ocuserguidev7.pdf> if you have not done so already.