

# OfficeCalendar Quick Start Guide

For Single and Multi-User Installations

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## Important Notes

OfficeCalendar allows you to network Outlook so you can share Outlook Calendar, Contact, Notes, and Task folders between Outlook users (or a single user), and also have access to these folders from the web and your mobile device (features vary among mobile devices). OfficeCalendar is comprised of 4 parts:

**OfficeCalendar Server (On Demand or Local):** where the Administrative controls are located, and the central function for how data flows between Outlook, OfficeCalendar Online and OfficeCalendar Mobile. The Server can be cloud based (strongly recommended for installations below 25 users), or run locally on any networked machine in your office (dedicated server is not required).

**OfficeCalendar Client for Outlook:** the add-in application installed locally into Outlook that allows you to sync your Outlook data with the OfficeCalendar Server.

**OfficeCalendar Online:** the hosted web service that allows you to access your Outlook data via the web and sync with OfficeCalendar Mobile. Your data will still be located in your Outlook installation, but will also now be accessible from anywhere you can get internet access on a PC or Mac. This service can be used stand-alone for people that don't have Outlook.

**OfficeCalendar Mobile:** installing the app on your iOS, Android, or Blackberry device allows you to wirelessly sync your Outlook data to your mobile device anywhere, anytime.

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**1. Begin Free Trial:** select this button from the Home page of our website, or select "Free Trial" from the menu.

**2. Free Trial Form:** you are only required to enter a value in the "Valid Email Address Field" and "Enter the security code shown below" in this form.

**3. Start Download Now:** you will be given the option to Run/Save/Cancel. Please select "Run".

**4. Easiest or Easy Option:** choose the "Easiest" option for OfficeCalendar On Demand Server (strongly recommended for installations below 25 users), or "Easy" to install the OfficeCalendar Server locally.

❖ *If you chose "Easy" option, skip to Step #9*

**5. Create On Demand Trial Account:** you will enter all the relevant information to create your trial account in this form.

**6. Company/Account Information:** please enter all your company and contact information, along with an email address and password for logging into the User's area on the website later. This login is not to be confused with the Username you will assign yourself for logging into the OfficeCalendar product. The "Account Name" will be your On Demand Server and Online Account name.

**7. Administrative Account Login:** create your Username and Password for the OfficeCalendar product. This will be used to log into the OfficeCalendar Client in Outlook, OfficeCalendar Online, and OfficeCalendar Mobile app.

**8. Accept Terms of Service:** check the box and then select "Submit". It may take a few minutes to generate your account, so please be patient.

**9. Wizard:** A setup Wizard should appear on screen in a separate window. If it doesn't, and you see a login screen instead, please enter the Username and

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Password you created in the previous form and click "OK".

- ❖ *If you chose the "Easy" option, you will have the extra step of creating an Administrator as your first step in the wizard.*

**Wizard [Users]:** this step allows you to set up additional users. Single users should skip by clicking "NEXT".

**Wizard [Resource Folders]:** please read the description on the screen carefully. This allows you to create additional syncing folders on this step.

**Wizard [Security]:** this step allows you to set up permissions for all OfficeCalendar users. Single users should skip by clicking "NEXT".

- ❖ *If you chose the "Easiest" option, skip to step - Wizard [Email Users]*

**Wizard [Online Account]:** for "Easy" users only. You will need to set up your Online Account in order to utilize OfficeCalendar Online and OfficeCalendar Mobile.

**Create Account:** click the button to create your online account.

**Create new account:** fill in form details and select Submit.

**Generate your OfficeCalendar Online Link:** create your unique login URL for OfficeCalendar Online. No special characters are allowed in this field.

**Wizard [Email Users]:** enter an email address here to email the OfficeCalendar Client add-in for Outlook installation instructions to all users that have been created in the Wizard [Users] step. Each user will need to refer to the instructions in this email to complete the setup.

**Wizard [Generate Admin Document]:** IMPORTANT: Save and Print the OfficeCalendar Admin Document.

This document contains all your critical OfficeCalendar information and should be saved as you will need it later.

- ❖ *If you chose the "Easy" option, activate your OfficeCalendar Online sync by going to the OfficeCalendar Online tab, selecting "Activate Online Sync" and then "Sync Now".*

**10. Client Install Email:** in the Wizard [Email Users] step, the system emailed the OfficeCalendar Client add-in for Outlook installation instructions to each user. Please refer to this email for easy to follow instructions.

Once you have completed Step 10, you should now be syncing between your Outlook and OfficeCalendar Online account, and your data is available for web access at the OfficeCalendar Online link in your OfficeCalendar Admin Document.

## What's Next?

Please allow some time for the sync process to populate everyone's Outlook with the shared data. If you have any questions or technical issues, please call us at 866-847-7512 for assistance, or visit Support on our website.

<http://www.officecalendar.com/support/support.aspx>

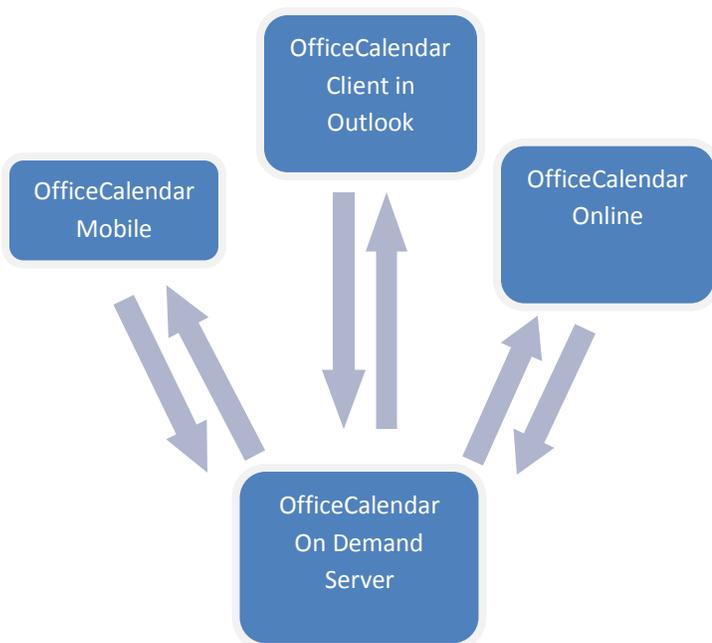
If you want to take advantage of syncing your Outlook data to your iPhone, Android or Blackberry device, please refer to the Guide for OfficeCalendar Mobile. You can get that here

<http://officecalendar.fileburst.com/documents/Guide%20to%20OfficeCalendar%20Mobile.pdf>

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## Sync Process Overview

*OfficeCalendar On Demand Server  
("Easiest")*



When using OfficeCalendar On Demand Server, all the different components of OfficeCalendar sync with the hosted OfficeCalendar Server application directly. This means the data is immediately available to all components once the sync is complete.

## Sync Process Overview

*OfficeCalendar local Server  
("Easy")*



When using the OfficeCalendar local Server, the OfficeCalendar Client application in Outlook syncs with the local OfficeCalendar Server, which in turn publishes that information back and forth with the hosted OfficeCalendar Online service on a scheduled basis (the quickest is every 30 minutes). OfficeCalendar Mobile syncs with the OfficeCalendar Online service.