Version 2.4 Upgrade Installation Guide OfficeCalendar for Microsoft® Outlook™

Sharing Microsoft Outlook Calendar and Contacts without Exchange Server



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Important Note for Version 1 Users with Resource Folders

Since adding a Resource User was a manual process that required an entry into the OfficeCalendar database prior to the release of OfficeCalendar Version 2, there is a procedure that you will need to follow in order to keep the data from the Resource User intact during the Version 2 upgrade process. Please follow the steps outlined below BEFORE installing the Version 2 upgrade in order to retain the current Version 1 Resource User's calendar and/or contact information.

1. Go to an OfficeCalendar Client PC that belongs to an OfficeCalendar user that has access to the current Resource User(s) Outlook information that you wish to retain (i.e. Calendar and/or Contacts folder) and launch Outlook.

2. Manually rename the Outlook Calendar and/or Contacts sub-folder(s) that belong to the Resource User(s). For example, if the Resource User folder is named "Conference, Room," right-click the folder and choose **Rename**. Rename the folder to something else like "Conference Room Temp." Perform this procedure for each Resource User that you have designated. The process need only be performed on one Client PC.

3. Proceed with the Version 2 OfficeCalendar Server and OfficeCalendar Client installations, perform a synch on each OfficeCalendar Client, and return here to step 4 once completed.

4. After the OfficeCalendar Server and all OfficeCalendar Client installations are completed and have synched at least once, log into the OfficeCalendar Server & Administration Console on the PC designated as the OfficeCalendar Server.

5. After logging into the OfficeCalendar Server & Administration Console you will see a list of all active users on the left side. You will see this information divided into 3 columns: **User ID**, **Name**, and **Type**. Look to the **Type** field that corresponds to your Resource User(s). If the designation is 'R' than proceed to step 7.

6. Step 6 SHOULD ONLY BE FOLLOWED if the **Type** field for your Resource User is NOT displayed as R. If this is the case, delete your Resource User(s) then add the Resource User(s) back as a new user. When creating the Resource User(s) be sure to choose the **Resource User** checkbox. In the **Folder Name** field you may choose to display the Resource User(s) as anything you wish, for example "Conference Room" as opposed to the old format of "Conference, Room."

7. Return to the PC where you renamed the original Resource User folder(s) in Outlook (see step 2) and perform an OfficeCalendar synch. The new Resource User folder(s) that you created will be displayed as blank folders. Copy the information from the Resource Folder(s) that you renamed in step 2 into the appropriate corresponding new Resource Folder(s) created with the new synch. Once all the information has been copied into the new Resource Folder(s), synch this OfficeCalendar Client.



8. Go to another OfficeCalendar Client and synch it. Once you have verified on the second OfficeCalendar Client that all the appropriate information has synched into the newly created Resource Folder(s), return to the first OfficeCalendar Client.

9. On the first OfficeCalendar Client you may now manually delete all of the Resource Folders with the "Conference Room Temp." naming convention as outlined in step 2.

OfficeCalendar Version 2.4 Upgrade Overview

OfficeCalendar Clients lower in version number than 2.4 are not interoperable with the OfficeCalendar Version 2.4 Server, and vice-versa. However, trying to synchronize a Version 1x - 2.2x Client with the Version 2.4 Server, and vice-versa, will not harm OfficeCalendar in any way. If there is a version mismatch between the OfficeCalendar Client and Server software, the end-user will receive a message telling them of the version mismatch and to contact their OfficeCalendar Administrator.

Thus, to avoid confusion among end-users, we suggest that you notify all OfficeCalendar users of the day and approximate time you'll be performing the upgrade. Also, because both the OfficeCalendar Server and Client software need to be upgraded, we recommend that you perform the upgrade when you have the time to upgrade both the Server software and all Outlook Clients using OfficeCalendar with the OfficeCalendar Version 2.4 Client upgrade.

Both the OfficeCalendar Server and Client upgrades are easy to perform and install quickly. When performed properly, it is estimated that the typical OfficeCalendar Server upgrade will take less than 5 minutes, while each OfficeCalendar Client upgrade will take approximately 1 minute.



Installing the OfficeCalendar Version 2.4 Server Upgrade

- If you have not done so already, download the OfficeCalendar Version 2.4 upgrade installer from our website at <u>http://www.officecalendar.com/purchase/login.asp</u>. You'll need your customer login information to obtain the upgrade.
- 2. Double-click on the **ocupgrade2400.exe** file that you downloaded from our website.



3. From the OfficeCalendar Server Upgrade Welcome screen; click Next.

😼 OfficeCalendar Server Upgrade 🛛 🛛 🔀	
Development of the second and the se	Welcome to the upgrade for OfficeCalendar Server 2.4.0.0. It is strongly recommended that you exit all Windows programs before continuing with this installation. If you have OfficeCalendar Server running it will be shut down automatically. If you have any other programs running, please click Cancel, close the programs, and run this setup again. Otherwise, click Next to continue.
	< <u>B</u> ack <u>N</u> ext > <u>C</u> ancel

4. Select the folder where your current OfficeCalendar Server is installed, and click **Next**. *If your current OfficeCalendar Server is installed in the C:\Program Files\OfficeCalendar Server folder, the OfficeCalendar Server Upgrade installer will detect and apply it automatically for you.*

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5 OfficeCalendar Server Setup	
Installation Folder Where is your current version installed?	
Please choose the path to your current OfficeCalendar Server installation.	
Upgrade OfficeCalendar Server in:	
C:\Program Files\OfficeCalendar Server	C <u>h</u> ange
< <u>B</u> ack <u>N</u> ext >	<u>C</u> ancel

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



SofficeCalendar Server Upgrade	×
OfficeCalendar Client Installation Files Where would you like the Client Install files to be installed?	
Choose a path where you would like to store the files necessary to install the OfficeCalendar Clier It is recommended that you accept the default value given below. If you do need to change the path, click the Change button. This folder will need to be shared on your network after this installation is complete.	nt.
Install Client Files to:	
C:\ocalclient C <u>h</u> ange	
< <u>B</u> ack <u>N</u> ext> <u>C</u> ancel	

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



SofficeCalendar Server Setup	×
License Agreement Please read the following license agreement carefully.	
SOFTWARE LICENSE AGREEMENT]
IMPORTANT INSTRUCTIONS: Please carefully read the following instructions and Software License Agreement before downloading.	
By downloading and installing OfficeCalendar you agree to follow these important instructions:	
Make a backup copy of your data before installing OfficeCalendar. Lookout Software is not responsible for lost or duplicated data.	
 I agree to the terms of this license agreement 	
I do not agree to the terms of this license agreement	
< <u>B</u> ack <u>N</u> ext > <u>C</u> ancel	

7. From the Ready to Upgrade dialog box; click Next.



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🎭 OfficeCalendar Server Upgrade	×
Ready to Upgrade You are now ready to upgrade OfficeCalendar Server 2.4.0.0	
The installer now has enough information to upgrade OfficeCalendar Server on your computer.	
The following settings will be used:	
Install folder: C:\Program Files\OfficeCalendar Server	
Please click Next to proceed with the upgrade.	
< <u>B</u> ack <u>N</u> ext > <u>C</u> ancel	

8. Once the OfficeCalendar Server upgrade setup has successfully installed; click **Finish**.



🌄 OfficeCalendar Server U	pgrade	×
	Upgrade Successful The OfficeCalendar Server 2.4.0.0 upgrade is complete. Thank you for choosing OfficeCalendar Server! Please click Finish to exit this installer.	
	< <u>B</u> ack <u>Einish</u> <u>C</u> ancel	

 Just after you click Finish you'll see the What's Next screen appear. This 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. When you are finished reading the text in the What's Next page, close the window. Your OfficeCalendar Server Version 2.4 upgrade is now complete – proceed to the topic Installing the OfficeCalendar Version 2.4 Client Upgrade.



🗿 What's Next - Microsoft Internet Explorer		
j File Edit View Favorites Tools Help		
🕞 Back 🔹 📀 👻 📓 🏠 🔎 Search 👷 Favorites 🔇 Media 🚱 🔗 + 🌺 🚍 🔸		
🕴 Address 🖉 C:\Program Files\OfficeCalendar Server\whatup.htm 🛛 💽 Go		
🕴 🖸 Google - 💽 Search 🔹 🚿 PageBank 🕸 374 blocked 👋 Check 🔹 » 🕴 Links		
What's Next?		
You have finished upgrading the OfficeCalendar Server.		
To complete installing the OfficeCalendar upgrade, you will need to upgrade each of your client installations to version 2.4.0.0. If one of your clients try to connect to the server before it has had a chance to be upgraded, it will get a message that it needs to be updated and it will configure itself to work offline. It will not cause any problems with the upgraded installation.		
In the C:\ocalclient directory, you should see a setup.exe file. This is the file that you will need to execute on each user's computer. This file will install right over their current installation.		
While you are still at the server, check to make sure the C:\ocalclient directory is still shared, so you can connect to it from your client computers to run the install.		
If you have Outlook installed on this machine, and the user of this machine will be sharing information with OfficeCalendar then you should run the client install (setup.exe) from the <u>C:\ocalclient directory</u> on this machine.		
For more detailed information on how to install or to find out about all the new features in Version 2, please read the updated <u>user guide</u> available from <u>http://www.officecalendar.com</u> .		

10. Finally, before proceeding to the next step in the upgrade process, start the OfficeCalendar Server by clicking on the **OfficeCalendar Server** icon on the desktop in which the Server was installed.



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.

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.





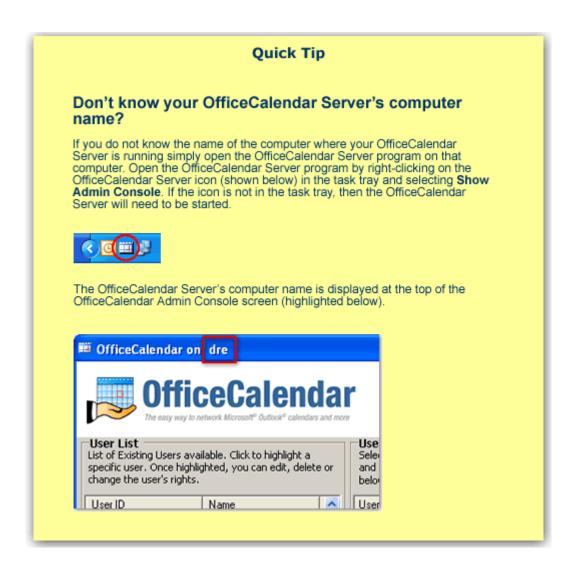


Installing the OfficeCalendar Version 2.4 Client Upgrade

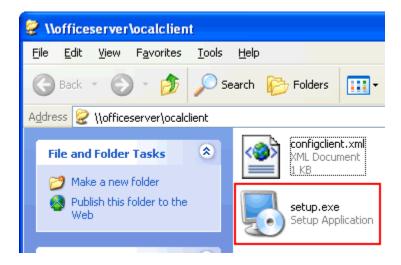
 From each workstation where you are upgrading the OfficeCalendar Version 2.4 Client software, browse to the **ocalclient** folder on the computer where the OfficeCalendar Server is installed. The easiest way to do this is to click **Start** | **Run**; and type in *YourOfficeCalendarServer'sComputerName*\ocalclient; and click **OK**. In the example below, "ocserver" represents the OfficeCalendar Server's computer name.

Run	? 🛛
-	Type the name of a program, folder, document, or Internet resource, and Windows will open it for you.
Open:	\\pcserver\pcalclient
	OK Cancel <u>B</u> rowse





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



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

🕮 OfficeCalendar Client Se	itup 🛛 🔀
	Welcome to the installer for OfficeCalendar Client 2.4.0.0. It is strongly recommended that you exit all Windows programs before continuing with this installation. If you have any other programs running, please click Cancel, close the programs, and run this setup again. Otherwise, click Next to continue.
	< <u>B</u> ack <u>N</u> ext > <u>C</u> ancel

 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.





🕮 OfficeCalendar Client Setup 🛛 🛛 🔀
Installation Folder Where would you like OfficeCalendar Client to be installed?
The software will be installed in the folder listed below. To select a different location, either type in a new path, or click Change to browse for an existing folder. We suggest you use the default folder shown, if at all possible.
Install OfficeCalendar Client to: C:\Program Files\OfficeCalendar C <u>h</u> ange
< <u>B</u> ack <u>N</u> ext > <u>C</u> ancel

5. From the Ready to Install screen; click Next.

III OfficeCalendar Client Setup	×
Ready to Install You are now ready to install OfficeCalendar Client 2.4.0.0	
The installer now has enough information to install OfficeCalendar Client on your computer.	
The following settings will be used:	
Install folder: C:\Program Files\OfficeCalendar	
Please click Next to proceed with the installation.	
< <u>B</u> ack <u>N</u> ext > <u>C</u> ancel	

6. From the Almost done... screen, click Next.



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OfficeCalendar Client Setup	
Almost done	
The main installation has finished.	
There are a few steps that need to be completed to confinalize the installation.	onfigure your installation. Please click Next to
< <u>B</u> ack	<u>N</u> ext > <u>C</u> ancel

7. Click **Finish** when the OfficeCalendar Client installation has successfully completed.



OfficeCalendar Client Se	tup	×
	Installation Successful The OfficeCalendar Client 2.4.0.0 installation is complete. Thank you for choosing OfficeCalendar Client! Please click Finish to exit this installer.	
	< <u>B</u> ack <u><u>F</u>inish <u>C</u>ancel</u>	

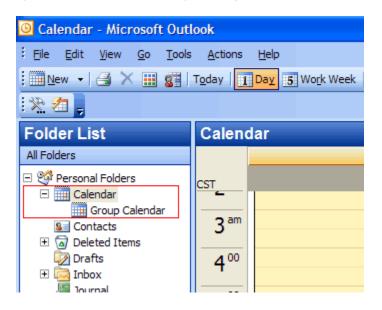
8. Start Microsoft Outlook on your computer.

🗿 Outlook Today - Microsoft Outlook							
Eile Edit	<u>V</u> iew <u>G</u> o	Tools	<u>A</u> ctions	Help			
🗄 🔂 New 🔹 🛃 🚰 Send/Receive 🔹 🏠 Find 🛄 T							
* 🖄 🖕							
Folder Lis	st		Persor	nal Fold	ler		
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Personal Caler Gal Cont Gal Delet Draff	ndar acts ted Items		mond ▶ 1:30 PM tuesd	- 2:30 PM	Cc		
			8:00 AM - 9:00 AM W				

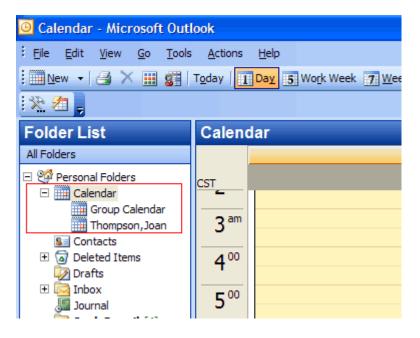
Click on the Synchronize OfficeCalendar icon.



If you are the first person to synchronize with the OfficeCalendar Server since the upgrade 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 after they've upgraded.



Once other users have synchronized after upgrading, you will see their folders appear in your Outlook folder list during your subsequent synchronizations.



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9. Repeat steps 1-8 above with all of your OfficeCalendar Client computers until all have been upgraded.

Additional Version 2.4 Upgrade Resources

To learn about the new features in OfficeCalendar Version 2.4, please visit our website at <u>http://www.officecalendar.com/products/whatsnew_v24.asp</u>. Also, please download the updated OfficeCalendar Installation and User's Guide for Version 2.4 from our website at <u>http://www.officecalendar.com/downloads/ocuserguide.pdf</u>.



