

Version 2.4 Upgrade Installation Guide

OfficeCalendar for Microsoft® Outlook™

Sharing Microsoft Outlook Calendar and Contacts without Exchange Server

"Sharing Microsoft Outlook Calendar and Contacts without Exchange Server"

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<http://www.officecalendar.com>



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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.

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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.

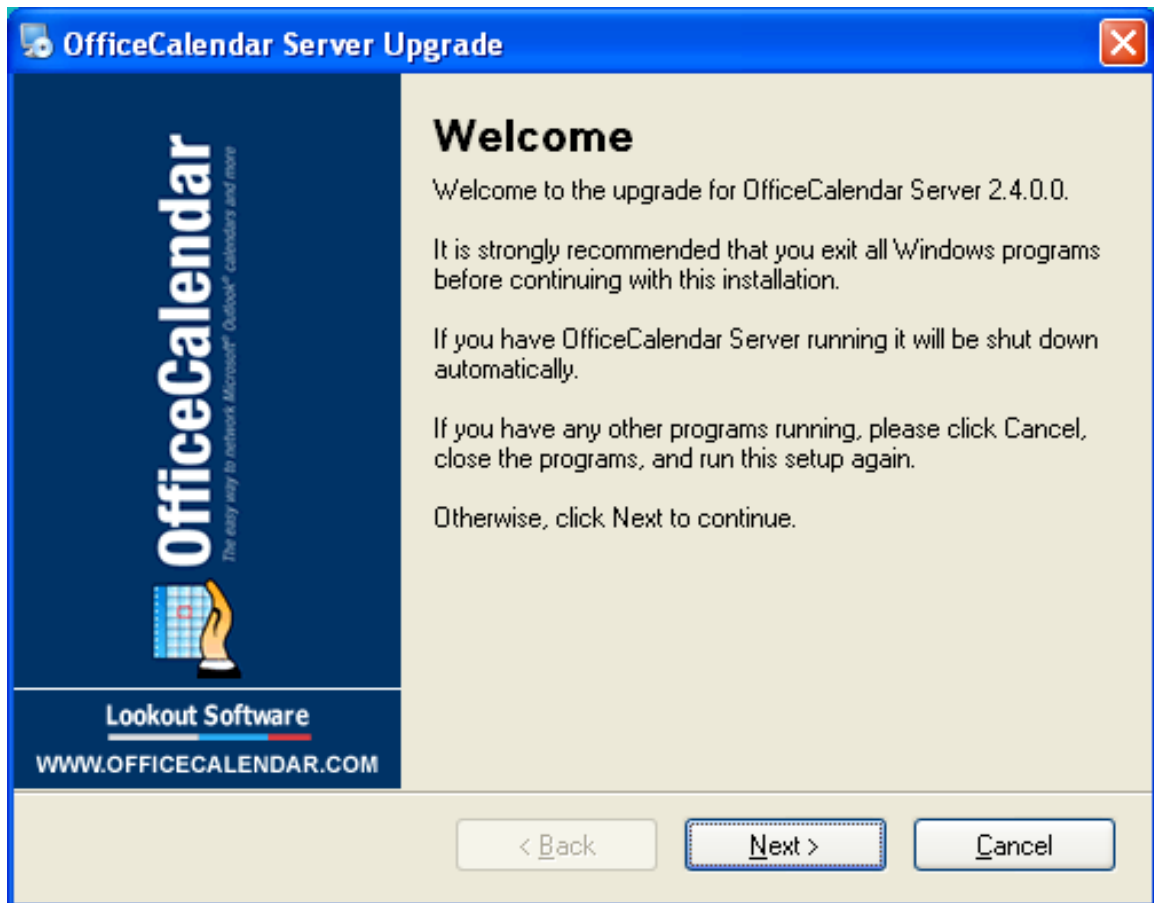
Installing the OfficeCalendar Version 2.4 Server Upgrade

1. If you have not done so already, download the OfficeCalendar Version 2.4 upgrade installer from our website at <http://www.officecalendar.com/purchase/login.asp>. 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.

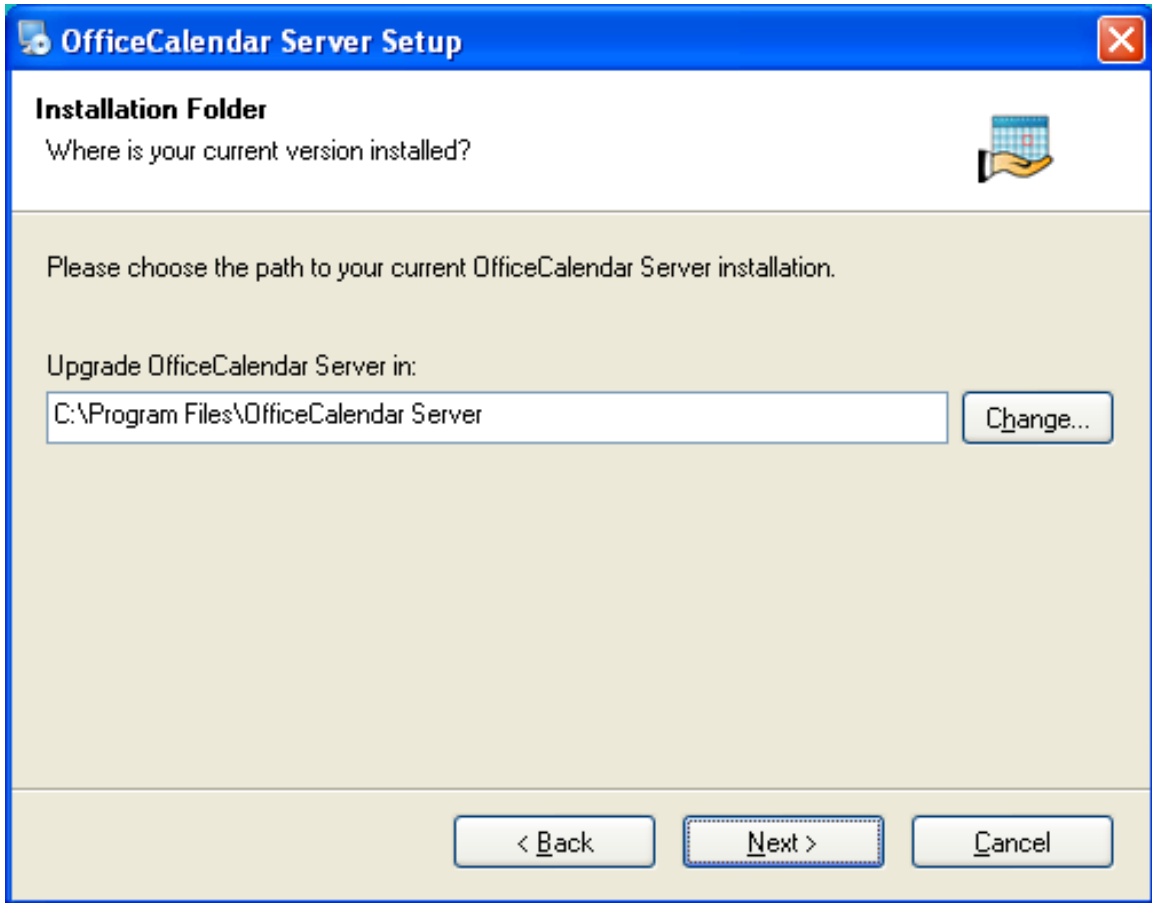


ocupgrade

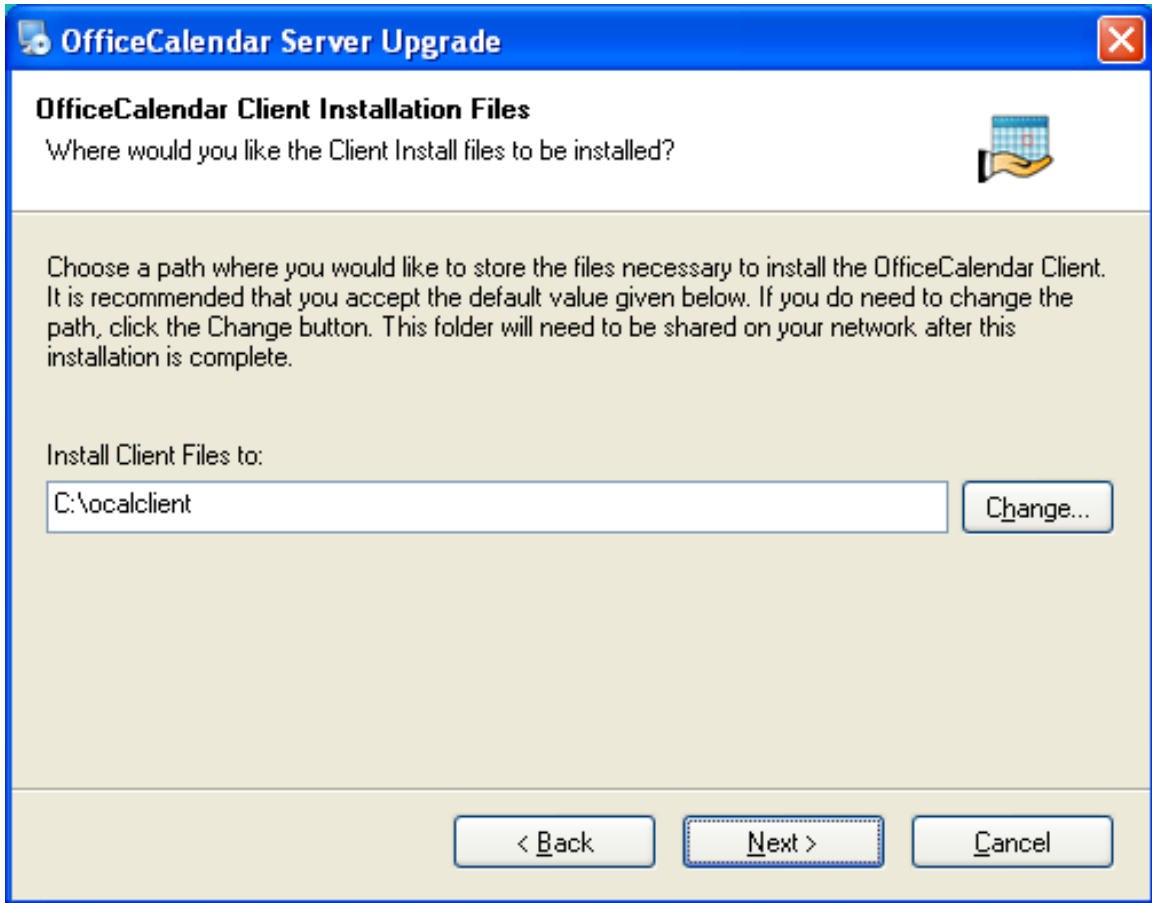
3. From the OfficeCalendar Server Upgrade **Welcome** screen; click **Next**.



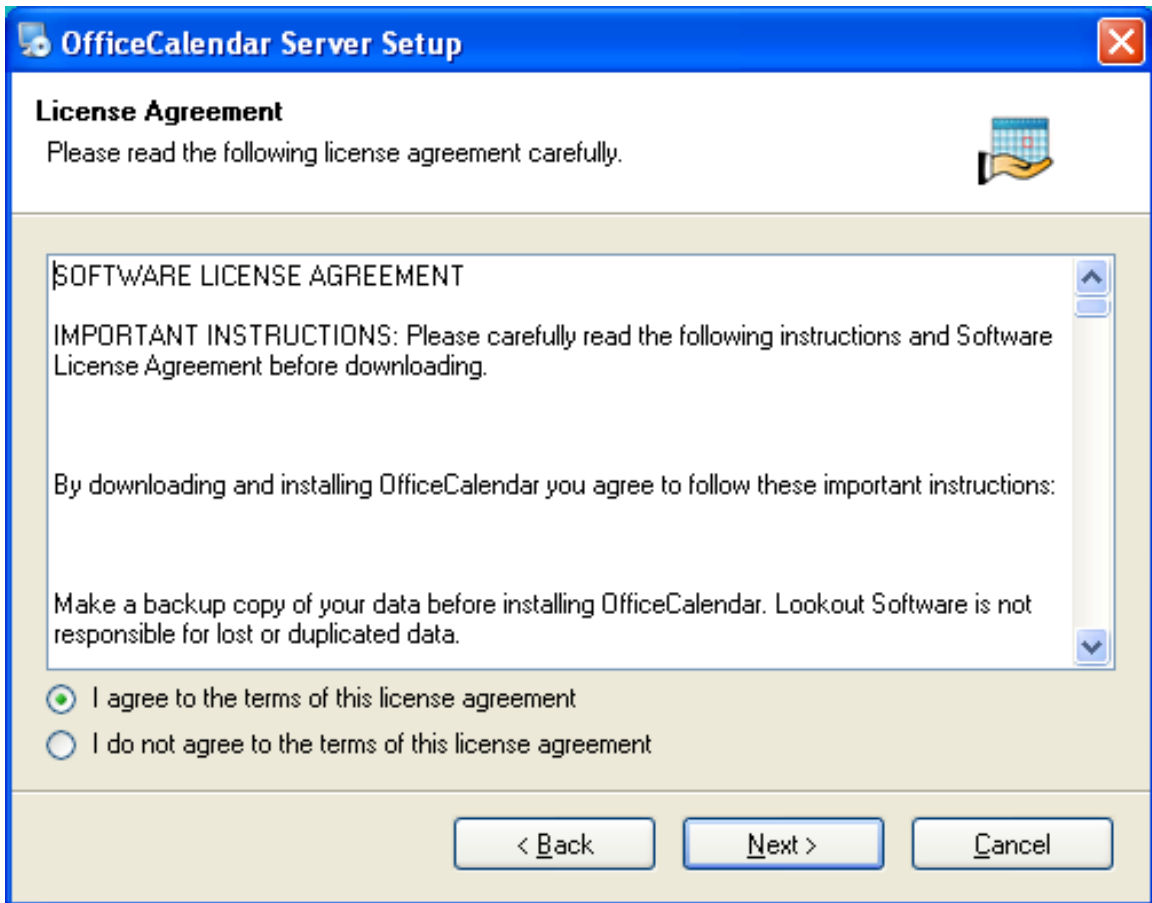
4. Select the folder where your current OfficeCalendar Server is installed, and click **Next**. *If your current OfficeCalendar Server is installed in the **C:\Program Files\OfficeCalendar Server** folder, the OfficeCalendar Server Upgrade installer will detect and apply it automatically for you.*



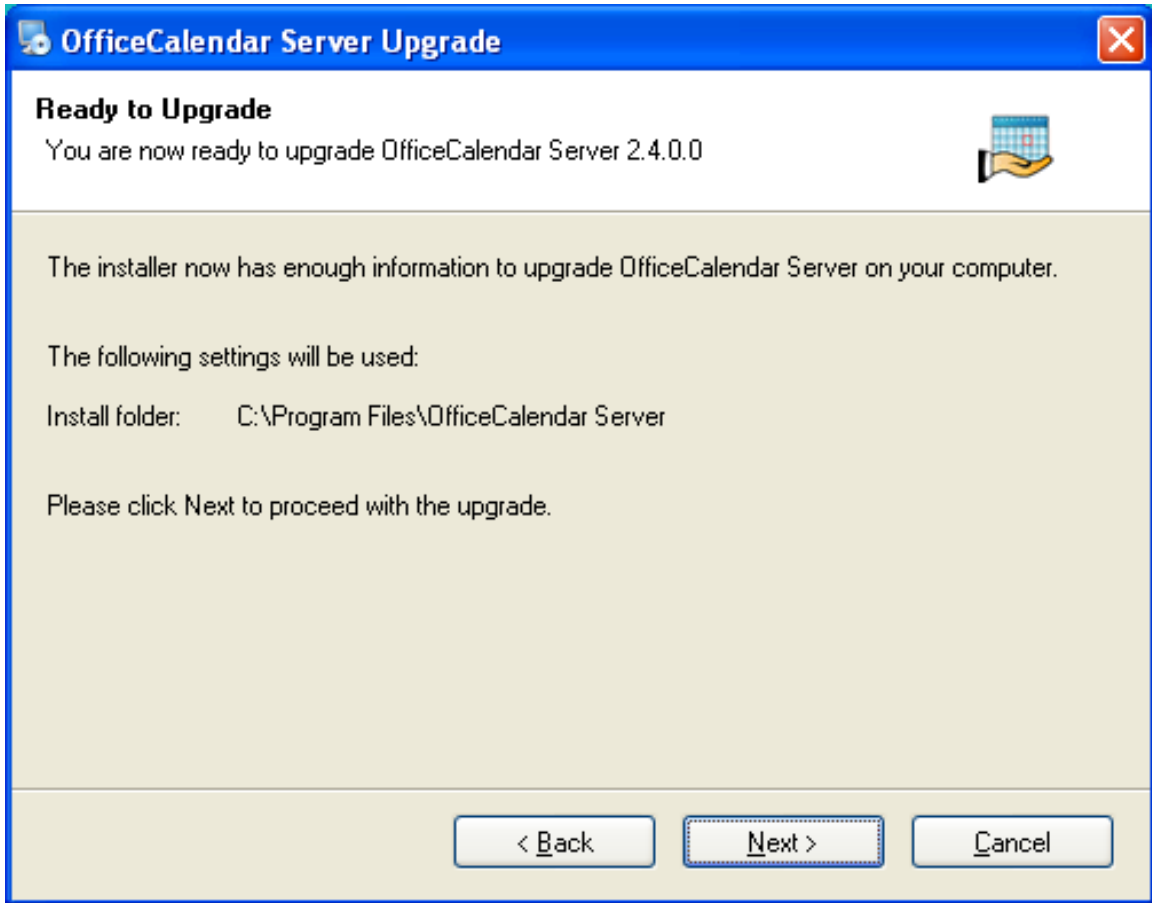
5. Select an installation folder for the OfficeCalendar Client installation files, and click **Next**. *For ease of support we recommend that you choose the default location of **C:\ocalclient**.*



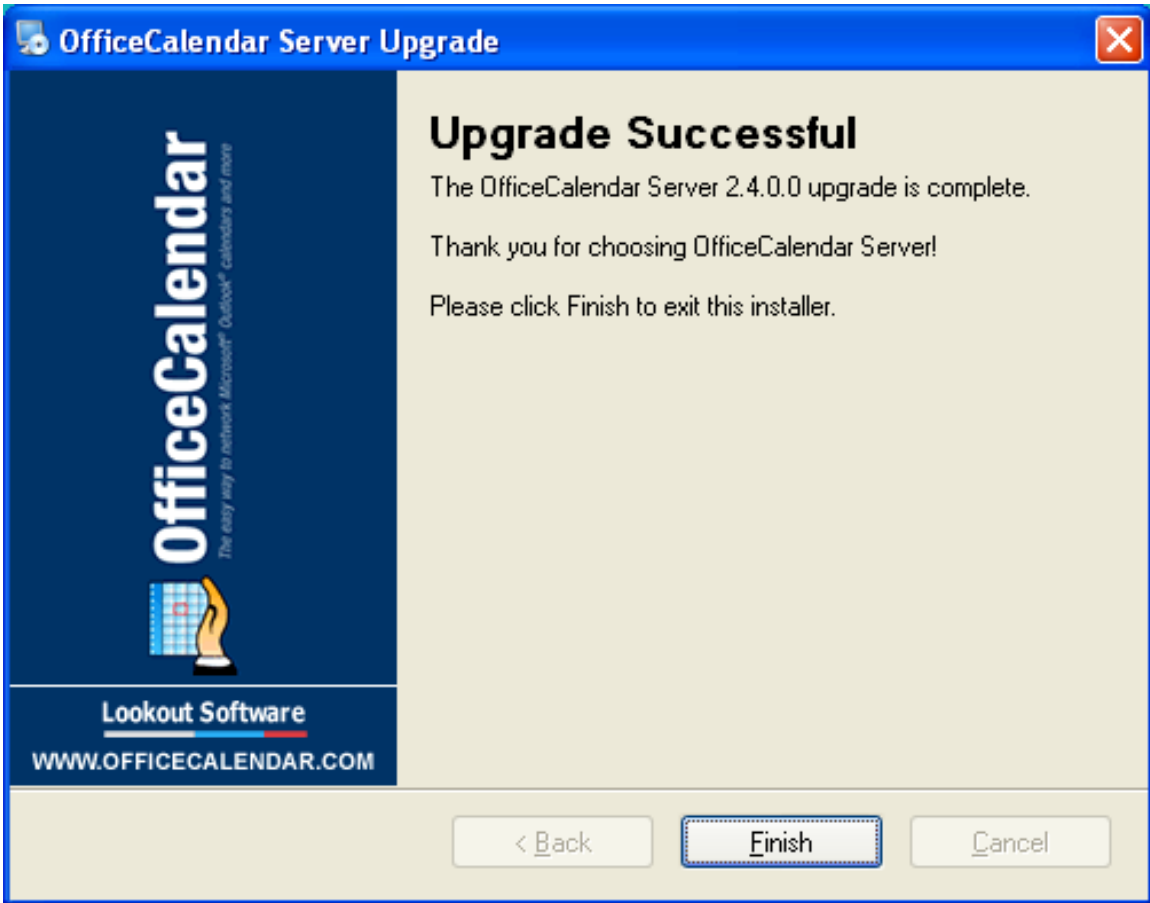
6. Please read the OfficeCalendar license agreement; click the ***I agree to the terms of this license agreement*** radio button; and click **Next**.



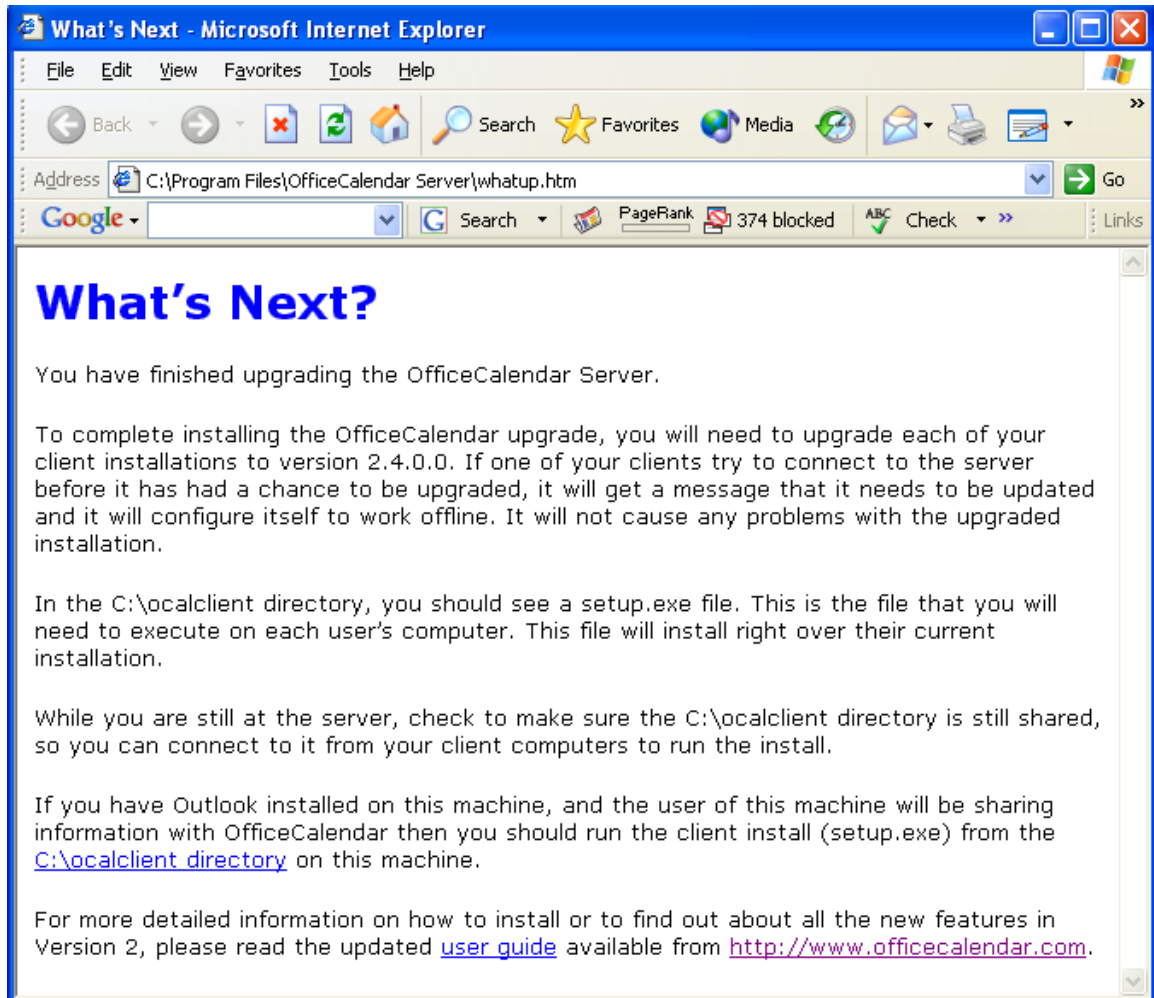
7. From the **Ready to Upgrade** dialog box; click **Next**.



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



9. 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**.



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.



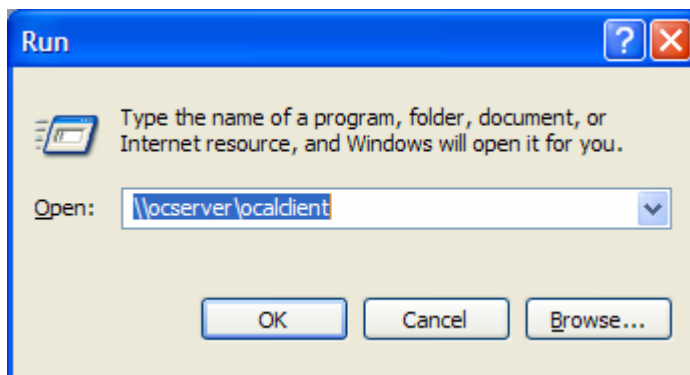
Quick Tip

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 Version 2.4 Client Upgrade

1. 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.



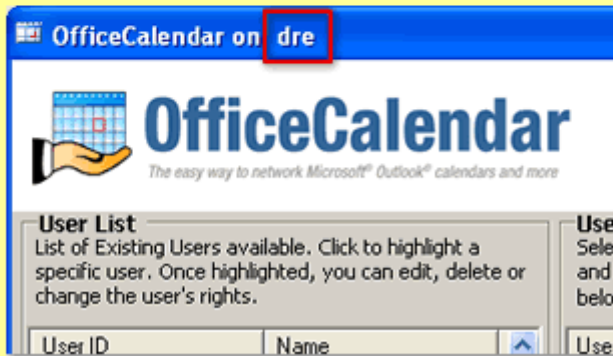
Quick Tip

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

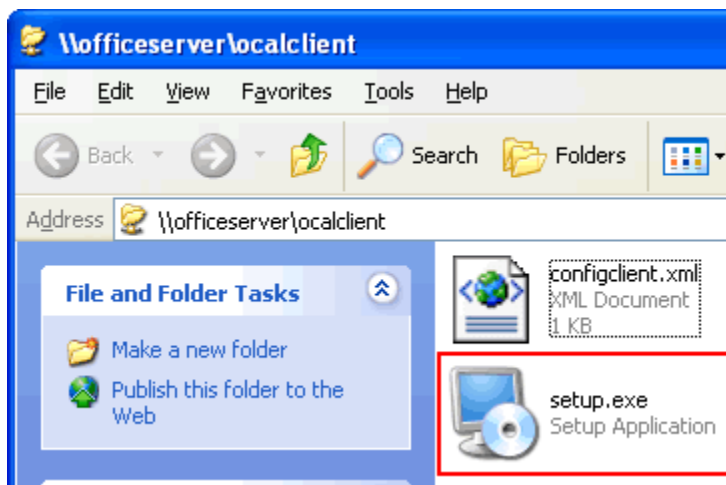
If you do not know the name of the computer where your OfficeCalendar Server is running simply open the OfficeCalendar Server program on that computer. Open the OfficeCalendar Server program by right-clicking on the OfficeCalendar Server icon (shown below) in the task tray and selecting **Show Admin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



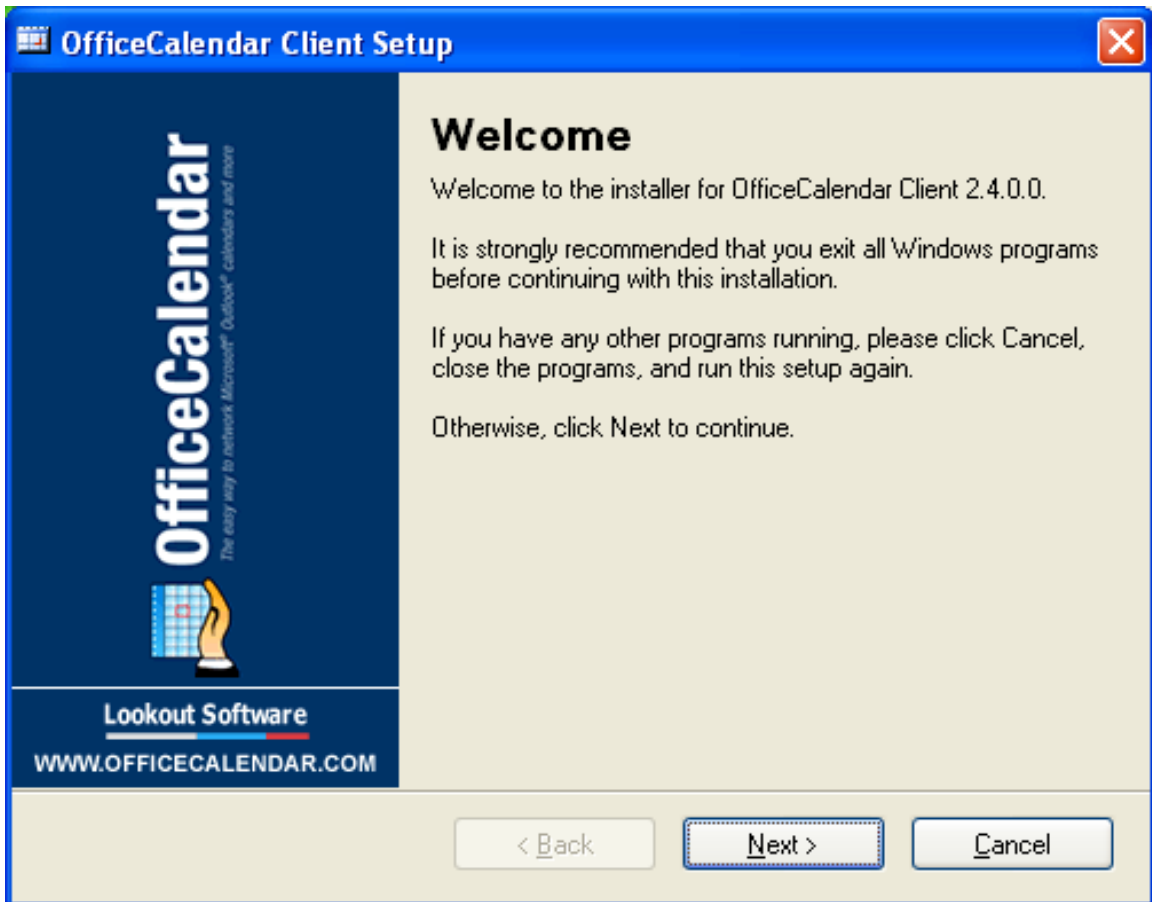
The OfficeCalendar Server's computer name is displayed at the top of the OfficeCalendar Admin Console screen (highlighted below).



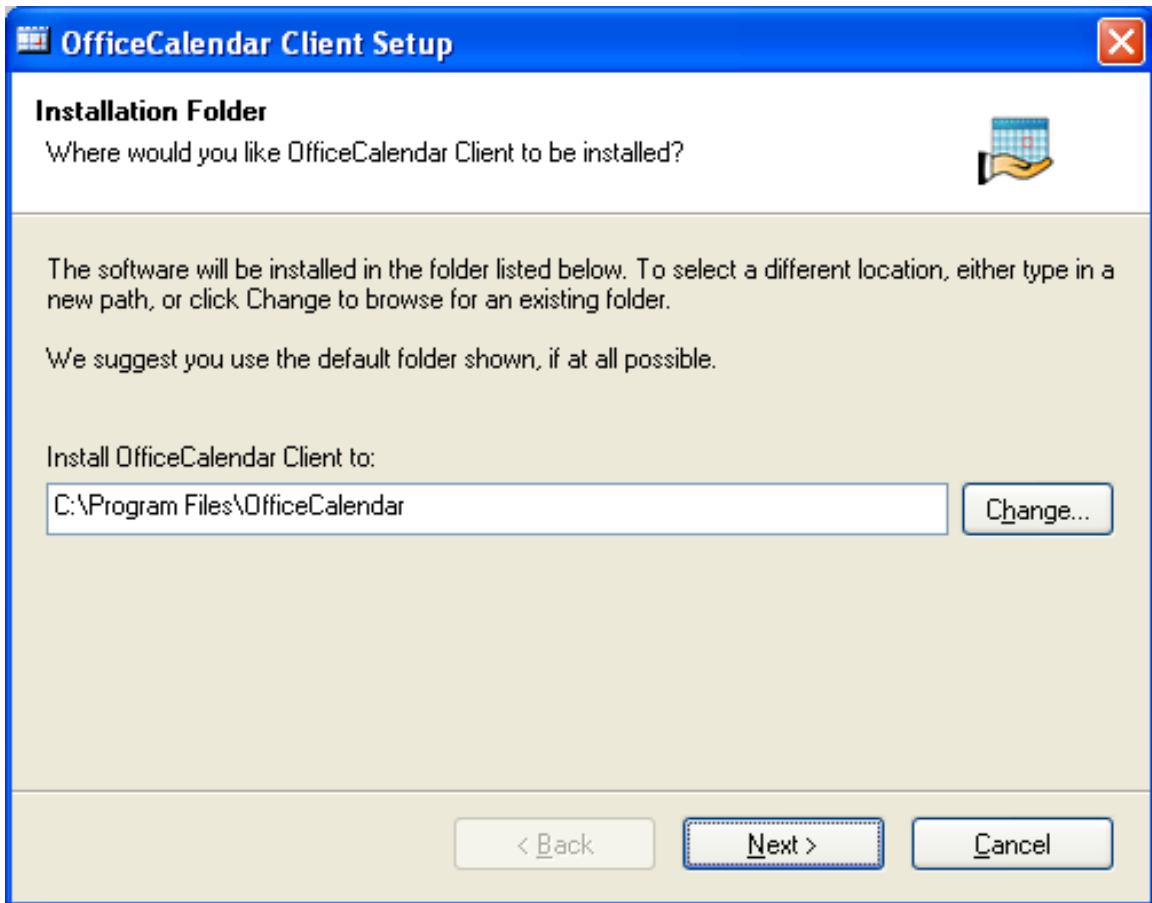
2. Double-click on the **setup.exe** icon (show below).



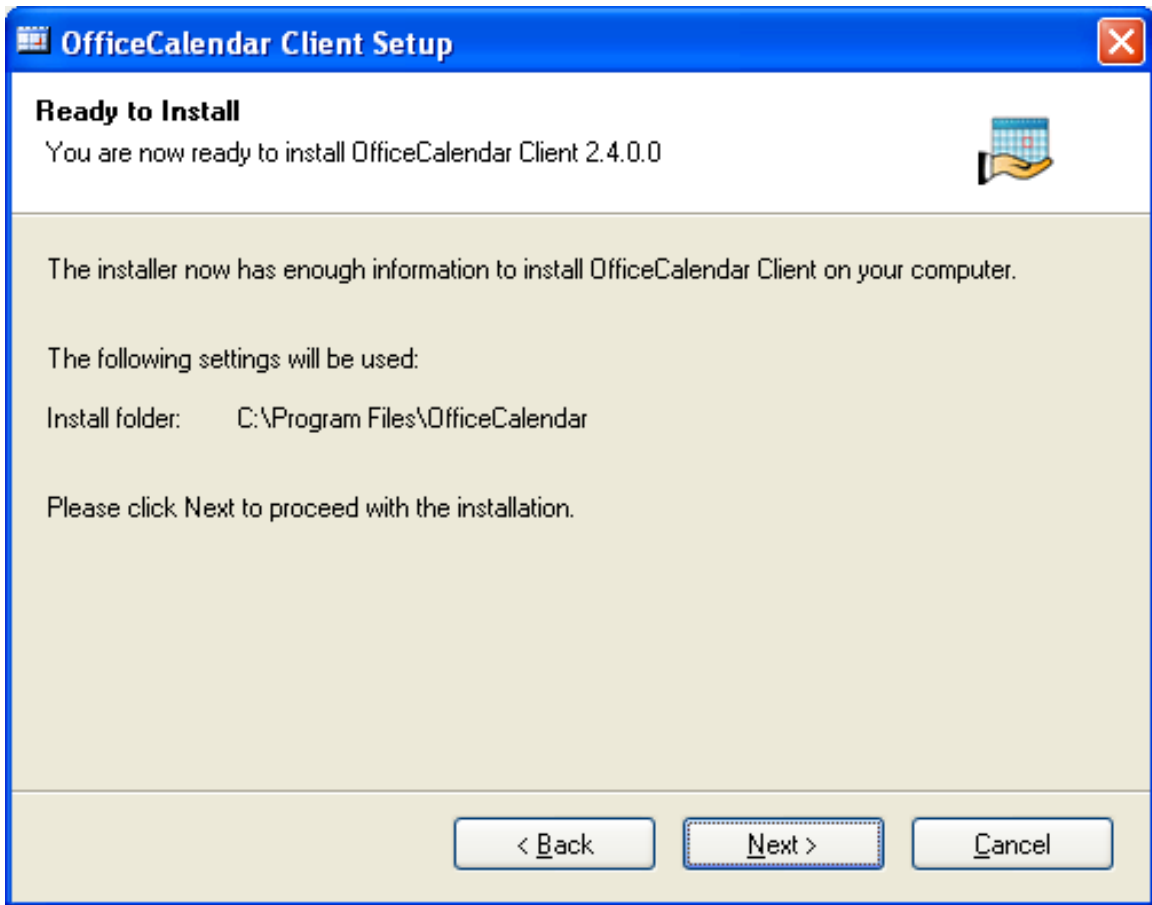
3. From the OfficeCalendar Client Setup **Welcome** screen, click **Next**.



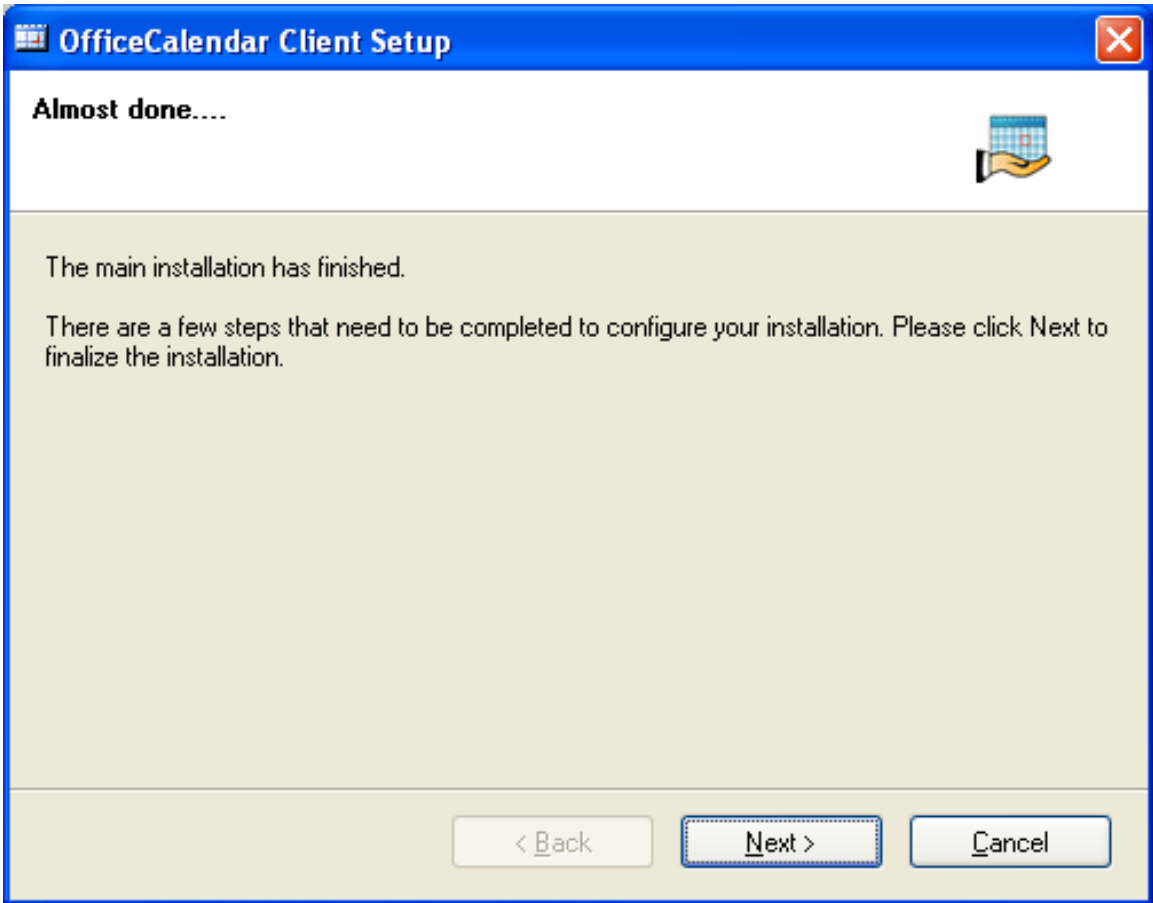
4. Select an installation folder for the OfficeCalendar Client installation (for ease of support we recommend that you choose the default location of C:\Program Files\OfficeCalendar); and click **Next**.



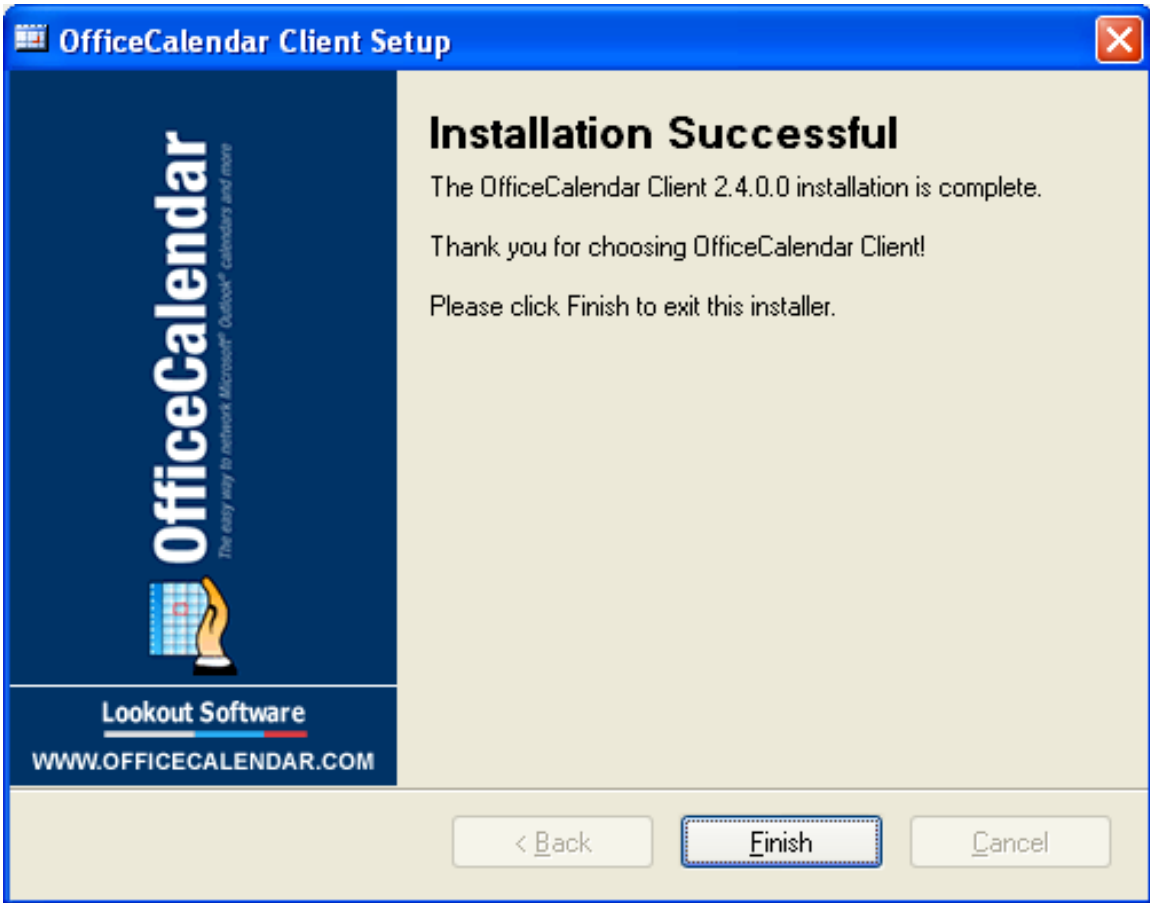
5. From the **Ready to Install** screen; click **Next**.



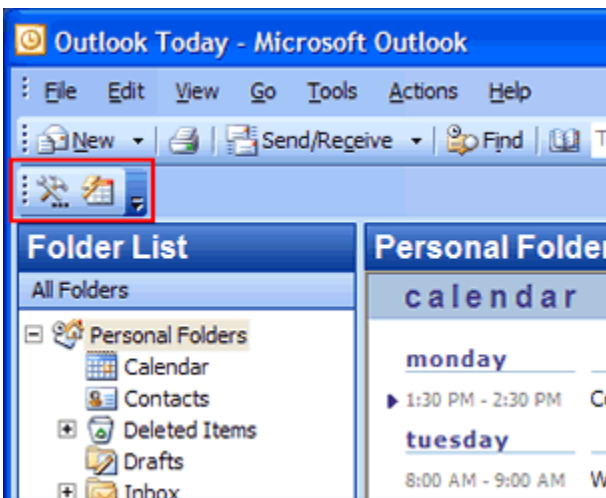
6. From the **Almost done...** screen, click **Next**.



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



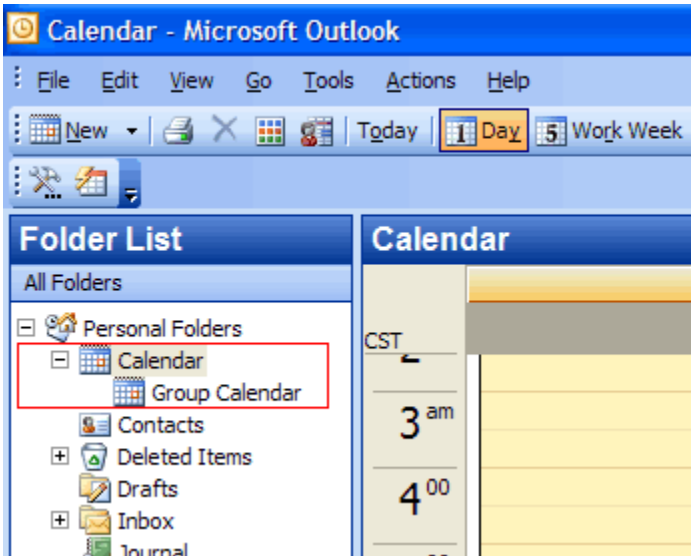
8. Start Microsoft Outlook on your computer.



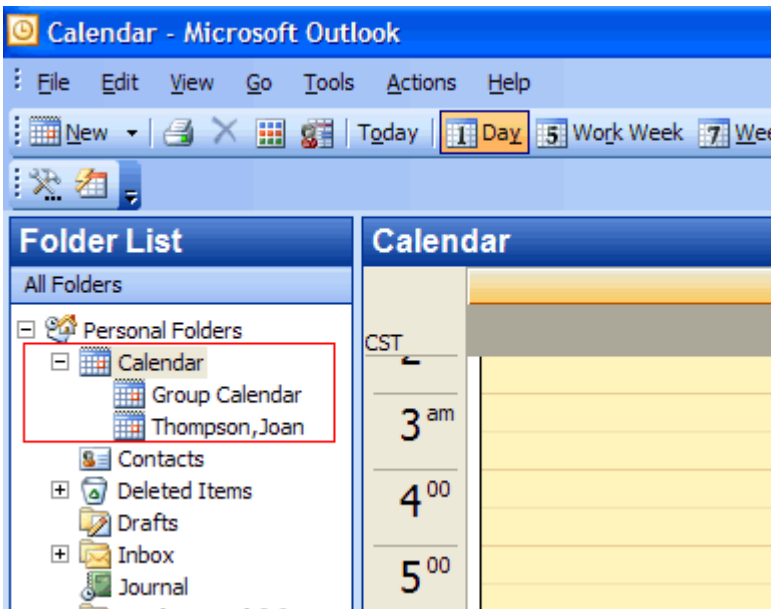
Click on the **Synchronize OfficeCalendar** icon.



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.



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