Version 5.0.0.0 Upgrade Installation Guide OfficeCalendar for Microsoft® Outlook™

Sharing Microsoft Outlook Calendar and Contacts without Exchange Server



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OfficeCalendar Version 5.0.0.0 Upgrade Overview

OfficeCalendar Clients lower in version number than 5.0.0.0 are not interoperable with the OfficeCalendar Version 5.0.0.0 Server, and vice-versa. However, trying to synchronize a Version 1x - 5.0.0.0 Client with the Version 5.0.0.0 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 5.0.0.0 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 5.0.0.0 Server Upgrade

- If you have not done so already, download the OfficeCalendar Version 5.0.0.0 upgrade installer from our website at <u>http://www.officecalendar.com/purchase/login.aspx</u>. You'll need your customer login information to obtain the upgrade.
- Double-click on the ocupgrade5000.exe file that you downloaded from our website.



ocupgrade5000.exe

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

😼 OfficeCalendar Server U	lpgrade 🛛 🕅
OfficeCalendar	Welcome to the upgrade for OfficeCalendar Server 5.0.0.0. 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.
The easy and affordable way to share Microsoft Outlook Calendars.	
	Next > Cancel

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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http://www.officecalendar.com



50 OfficeCalendar Server Setup	X
Installation Folder Where is your current version installed?	p 🖉
Please choose the path to your current OfficeCalendar Server installation.	
Upgrade OfficeCalendar Server in:	
C:\Program Files\OfficeCalendar Server	Change
< <u>B</u> ack <u>N</u> ext>	Cancel

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.

😼 OfficeCalendar 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 Client. 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.
C:\ocalclient Change
< <u>B</u> ack <u>Next></u> <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**.

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

😼 OfficeCalendar Server Upgrade 🛛 🛛 🛛
Ready to Upgrade You are now ready to upgrade OfficeCalendar Server 5.0.0.0
The installer now has enough information to upgrade OfficeCalendar Server on your computer.
The following settings will be used:
Install folder: C:\Program Files\DifficeCalendar Server
Please click Next to proceed with the upgrade.
< <u>Back</u>

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

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😼 OfficeCalendar Server U	pgrade 🔀
By Lookout software By Loo	Upgrade Successful The OfficeCalendar Server 5.0.0.0 upgrade is complete. Thank you for choosing OfficeCalendar Server! Please click Finish to exit this installer.
	< Back Einish Cancel

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 5.0.0.0 upgrade is now complete.

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 5.0.0.0. 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 setup5000.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 (setup5000.exe) from the C:\ocalclient directory on this machine. For more detailed information on how to install or to find out about all the new features in Version 5.0.0.0, 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, open the OfficeCalendar Administration Console by clicking on the **OfficeCalendar Admin** icon on the desktop in which the Server was installed.



11. You will now see the registration screens for OfficeCalendar Online once your OfficeCalendar Server upgrade is complete. Please read the OfficeCalendar Online license agreement; click **I agree to the terms of this license agreement** radio button. Then click **Continue**.

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.	
License Agreement	
Master Subscription Agreement TERMS OF USE OF OFFICECALENDAR ONLINE: BY CLICKING THE CHECKBOX DISPLAYED BELOW, YOU ("YOU" AND/OR "YOUR") AGREE TO THE FOLLOWING TERMS AND CONDITIONS (THE "AGREEMENT") GOVERNING YOUR USE OF OFFICECALENDAR ONLINE (THE "SERVICE"), USED IN CONJUNCTION WITH THE OFFICECALENDAR SOFTWARE PRODUCT ("OFFICECALENDAR"), PROVIDED BY LOOKOUT SOFTWARE LLC ("COMPANY"). IF YOU ARE ENTERING INTO THIS AGREEMENT ON BEHALF OF A COMPANY OR OTHER LEGAL ENTITY, YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND SUCH ENTITY TO THESE TERMS AND CONDITIONS, IN WHICH CASE THE TERMS "YOU" OR "YOUR" SHALL REFER TO SUCH ENTITY. IF YOU DO NOT HAVE SUCH AUTHORITY, OR IF YOU DO NOT AGREE WITH THESE TERMS AND CONDITIONS, YOU SHOULD NOT CHECK THE BOX DISPLAYED BELOW AND YOU MAY NOT USE THE SERVICE.	
✓ Lagree to the terms of this license agreement	2
Cancel Continue	

- 12. OfficeCalendar Online is an optional feature that allows OfficeCalendar users to access their Outlook shared calendars, contacts and tasks online while away from the office. OfficeCalendar Online is only available to OfficeCalendar customers that are currently subscribed to the OfficeCalendar Premium Maintenance & Upgrade Protection Plan. Please follow the steps for the option most appropriate for you:
 - a) If your organization is currently subscribed to the OfficeCalendar Premium Maintenance & Upgrade Protection Plan (if you aren't sure what Maintenance & Support Plan you are currently subscribed to, log into your account at http://www.officecalendar.com/purchase/login.aspx), you can create your

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http://www.officecalendar.com



organization's OfficeCalendar Online account or sign into an existing OfficeCalendar Online account and begin accessing your Outlook folders via the web.

To sign into your existing OfficeCalendar Online account, enter your organization's account name, and the email address and password that belongs to your OfficeCalendar customer account (used to log into OfficeCalendar.com to access your information, buy additional licenses, access your support account, etc.).

To create your organization's OfficeCalendar Online account, specify a personalized database account name for your organization's OfficeCalendar Online account (for example, you may want to use your company name or an abbreviation of your company name), and enter in the email address and password that belongs to your OfficeCalendar customer account (used to log into OfficeCalendar.com to access your information, buy additional licenses, access your support account, etc.).

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	
Database Name	
 Sign in to existing account 	
C Create new account	
Sign in to existing account	
Email	
Password	
Request Password Submit	

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If you signed into an existing account, you will see a popup notifying you that an account for your server has already been created. You will not lose any information that is already created in your OfficeCalendar Online account.

If you created a new account, you will see a popup notifying you that your organization's OfficeCalendar Online account has been created.

OfficeCalendar	×
Online Account successfully a	reated.
ОК	

b) If you do not wish to create an OfficeCalendar Online account at this time, or are not currently subscribed to the OfficeCalendar Premium Maintenance & Upgrade Protection Plan, please proceed to the next section.



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.







Configuring your organization's OfficeCalendar Online account

If you created an OfficeCalendar Online account for your organization, you'll need to activate the OfficeCalendar Online sync process and configure the OfficeCalendar Online sync settings in the OfficeCalendar Administration Console.

- 1. Open the OfficeCalendar Administration Console and click on the **OfficeCalendar Online** tab at the top.
- 2. Click the **Sync Now** button to synchronize all users' information to your organization's OfficeCalendar Online account.

PfficeCalendar on	
OfficeCalendar	
Accounts/Security Configuration Support OfficeCalendar Online	
Configure Settings	
C Activate Online Sync	Sync Now
Sync Every 1/2 hour/s	Show Logs
Admin Email Johntguomesports.com	
Admin Password	
Synchronize appointments Synchronize contacts Save Reset	
OfficeCalendar Online Account https://www.OfficeCalendarOnline.com/ArcIIN-Pgin	
Configure Licensing	1
Demo Expires: 11/26/2008 Enter Coge Console	b Rep

3. A popup dialog will appear notifying you that synchronization with your organization's OfficeCalendar Online account has occurred. Click **OK**.

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OfficeCalend	ar 🔀
Online synchro	onization completed successfully.
	ОК
Online synchri	OK

4. You and all other users created in the OfficeCalendar Administration Console can now begin logging into their OfficeCalendar Online account to access their individual and shared Outlook calendars. You can find your unique login URL to your organization's OfficeCalendar Online account in the **OfficeCalendar Online** tab in the OfficeCalendar Administration Console.

Contraction and the second sec				
OfficeCalendar				
Accounts/Security Configuration Support OfficeCalendar Online				
Configure Setting				
Activate Online Sync	Sync Now			
Sync Every 1/2 hour/s	Show Logs			
Admin Email juhngsuumesports.com				
Admin Password				
Synchronize appointments Synchronize contacts Seve Reset				
OfficeCalendar Online Account <u>https://www.OfficeCalendarOnline.com/AGUR-Picin</u>				
Configure Licensing	al 1445 [
Demo Expres: 11/26/2008 Enter Coge Consol	e Geb			

5. To log into your OfficeCalendar Online account, simply browse to your organization's OfficeCalendar Online login URL. Users can log in using the User Name and Password assigned to them in the OfficeCalendar Administration Console. For more information about using OfficeCalendar Online, please refer to the OfficeCalendar Installation and User Guide. You can download the user's guide at http://officeCalendar.fileburst.com/documents/ocuserguidev5.pdf if you have not done so already.

NOTE: If a user logs into their OfficeCalendar Online account before upgrading and syncing their Outlook client information with the OfficeCalendar Server, their online calendar will at first appear blank. Once the user syncs their Outlook client with the OfficeCalendar Server, their Outlook calendar appointments will appear in OfficeCalendar Online.



Installing the OfficeCalendar Version 5.0.0.0 Client Upgrade

 From each workstation where you are upgrading the OfficeCalendar Version 5.0.0.0 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:	\\ocserver\ocalclient
	OK Cancel <u>B</u> rowse





2. Double-click on the **setup5000.exe** icon (show below).



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



👼 OfficeCalendar Client Se	itup 🔀			
By Lookout software By Lookout software By Lookout software DifficeCalendar Calendars.	Welcome to the installer for OfficeCalendar Client 5.0.0.0. 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>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?	N
The software will be installed in the folder listed below. To select a different location, eit new path, or click. Change to browse for an existing folder. We suggest you use the default folder shown, if at all possible.	her type in a
Install OfficeCalendar Client to:	
C:\Program Files\OfficeCalendar	Change
< Back Next >	ancel

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



🐱 OfficeCalendar Client Setup
Ready to Install You are now ready to install OfficeCalendar Client 5.0.0.0
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>Back</u> Next> Cancel

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

👼 OfficeCalendar Client Setup	
Almost done	r 📂
The main installation has finished.	
There are a few steps that need to be completed to configure your installation. Pleas finalize the installation.	e click Next to
< <u>Back</u>	Cancel

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



🐱 OfficeCalendar Client Setup				
By Lookout software By Lookout software DifficeCalendar Calendars.	Installation Successful The OfficeCalendar Client 5.0.0.0 installation is complete. Thank you for choosing OfficeCalendar Client! Please click Finish to exit this installer.			
	< Back Einish Cancel			

8. Open Microsoft Outlook on your computer. You should see the OfficeCalendar toolbar and the new OfficeCalendar drop-down menu option in your Microsoft Outlook toolbar. *This new menu option was added in OfficeCalendar Version 5 to configure email folder sharing. For more information about configuring and sharing Outlook email folders, please refer to the OfficeCalendar Installation and User's Guide.*

🕞 Outlook Today - Microsoft Outlook							
Eile Edit	<u>V</u> iew	<u>G</u> o	<u>T</u> ools	<u>A</u> ctions	<u>H</u> elp	<u>O</u> fficeCa	lendar
<u>N</u> ew -		Send	l/Re <u>c</u> eive	- 1	Search a	iddress boo	oks 🔻
* 🖄 🔇	÷						
Mail	_			~ X	Per	sonal F	olders
Favorite Fold	ers			*			Mond
🖂 Inbox							wone

Click on the **Synchronize OfficeCalendar** icon.



All other users' folders will remain in your folder list before and after the first synchronization.

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🕞 Calendar - Microsoft Outlook					
<u> </u>	ons <u>H</u> elp	<u>O</u> fficeCalendar			
: <u>N</u> ew - 🔒 🗙 🔡 🚰 T <u>o</u> day	🔟 Searc	h address books 🛛 🗨 📔			
洗 ⁄组 🚳 💡					
Calendar «	Day	/ Week			
November 2008	E	Novembe			
26 27 28 29 30 31 1 2 3 4 5 6 7 8		30 Sunday			
9 10 11 12 13 14 15 16 17 18 19 20 21 22					
23 24 25 26 27 28 29 30 1 2 3 4 5 6	o am				
All Calendar Items 🔹					
My Calendars 🔗 📥	10				
Calendar (9)					
Large Conference	10 00				
Jones, Catherine Robinson, Ben	1100				

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

Additional Version 5.0.0.0 Upgrade Resources

To learn about the new features in OfficeCalendar Version 5.0, please visit our website at http://www.officecalendar.com/products/whatsnew_v50.aspx. Also, please download the updated OfficeCalendar Installation and User's Guide for Version 5.0 from our website at http://officecalendar.com/products/whatsnew_v50.aspx. Also, please download the updated OfficeCalendar Installation and User's Guide for Version 5.0 from our website at http://officecalendar.fileburst.com/documents/ocuserguidev5.pdf.

