INSTALLATION AND USER'S GUIDE

OfficeCalendar for Microsoft® Outlook™

Sharing Microsoft Outlook Calendar and Contacts without Exchange Server

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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 Contacts and Tasks with OfficeCalendar and create a consolidated Group Calendar view of multiple users' Outlook calendars.

Whether you have a dedicated server computer or a basic peer-to-peer network, OfficeCalendar can be installed on practically any Microsoft Windows® based network. Each person wishing to share Outlook calendars, contacts, and/or tasks with OfficeCalendar must have a copy of Microsoft Outlook 2000, XP, or 2003. However, OfficeCalendar can work with a mixture 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 on your network it will create sub-folders under each of your Outlook objects (calendar, contacts, and tasks) for each other person that is sharing their Outlook information with you. For Example, if you have a total of four users sharing Outlook with each other, OfficeCalendar will configure your Calendar folder structure similar to the illustration below:
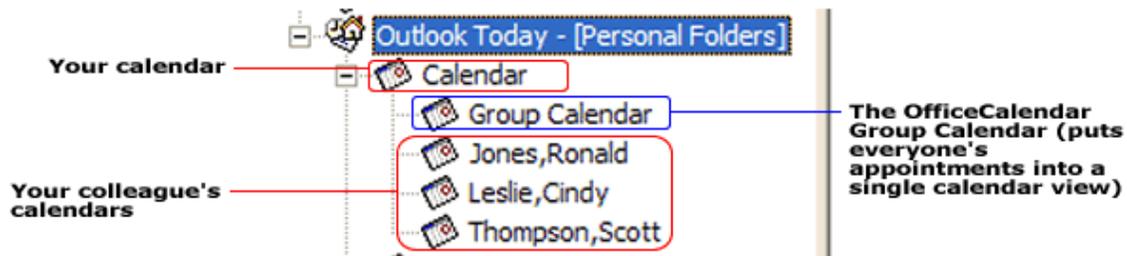
Your personal Outlook calendar is always at the top of the calendar structure (this is the same for your Outlook contacts and tasks as well). Each other person you are sharing Outlook calendars with is listed by name directly under your calendar along with a consolidated Group Calendar view (puts everyone's appointments into a single calendar view).

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 one of your 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 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.

OfficeCalendar Installation Overview

There are two components to the OfficeCalendar software program: the **OfficeCalendar Server** and the **OfficeCalendar Client**. The OfficeCalendar Server is the central bridge for which all Microsoft Outlook users communicate and exchange data between each other. The OfficeCalendar Client is a Microsoft Outlook add-in that becomes part of your Microsoft Outlook program. The OfficeCalendar Client allows you to view and modify others people's Outlook calendar as well as communicate with the OfficeCalendar Server, which in turn passes your calendar updates to other user's Outlook calendars, and vice versa.

The five basic steps to setting up OfficeCalendar are:

1. **Download the trial version of OfficeCalendar**

   Download the trial version of OfficeCalendar from our website at
   http://www.officecalendar.com/downloads/download.asp. You only need to download the trial version of OfficeCalendar **once** – the software you'll need for all of your office's workstations are included within this download.

2. **Install of the OfficeCalendar Server Software**

   The second thing you'll need to do is install the OfficeCalendar Server software. The OfficeCalendar Server software **is only installed on one computer**. The OfficeCalendar Server software can be installed on any computer connected to your office's network. If you have a dedicated computer in your office that acts as a network file and/or application server then you could install the OfficeCalendar Server software on that computer. If you are installing OfficeCalendar on a peer-to-peer network where there isn't a network server per-se, you will need to select one of the workstations on your network to install the OfficeCalendar Server. The OfficeCalendar Server and the OfficeCalendar Client can be installed and utilized on the same computer without problems.

   Microsoft Outlook does not need to be installed on the computer that is running the OfficeCalendar Server unless you will be using the OfficeCalendar Client software on the same computer as well.

3. **Add user accounts to the OfficeCalendar Server**

   Once you've installed the OfficeCalendar Server, you will need to open the OfficeCalendar Server application and add a user account for all of the users in your office that will share Outlook calendars, contacts, and tasks.

4. **Ensure that the OfficeCalendar Client installation folder is shared on your network**

   The initial OfficeCalendar Server installation also copies the OfficeCalendar Outlook add-in software required for each Outlook user to a folder called **c:\ocalclient**. This is done for your convenience so that each user on your network doesn't have to download the OfficeCalendar software separately.

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 for you. However, this may not work on some computers.

5. **Install the OfficeCalendar Client add-in on each Microsoft Outlook workstation**

   Finally, after you have created user accounts for all of your users, the OfficeCalendar Client is installed on each person's computer that will share Microsoft Outlook calendar, contacts, and tasks in your office.

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/trial.asp.

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

   ocinstall.exe

3. From the **Welcome to the OfficeCalendar setup** screen, please note that you will only need to install the "**ocinstall.exe**" file you downloaded once. During the initial setup, OfficeCalendar Server installer will create a shared network folder which will be used to install the OfficeCalendar Client software for Microsoft Outlook. Click **Next** to proceed with your OfficeCalendar installation.
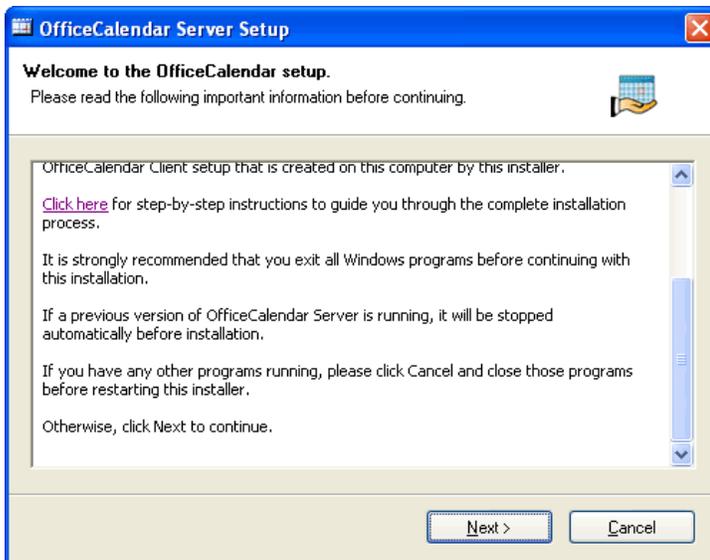
4. If you <u>do not</u> have Microsoft's .NET Framework installed on your computer you will see the screen below – please proceed to *step 4a*. If you <u>do</u> have the Microsoft .NET Framework installed on your computer you will not see the screen below -- please proceed to *step 5* (on *page 7*).
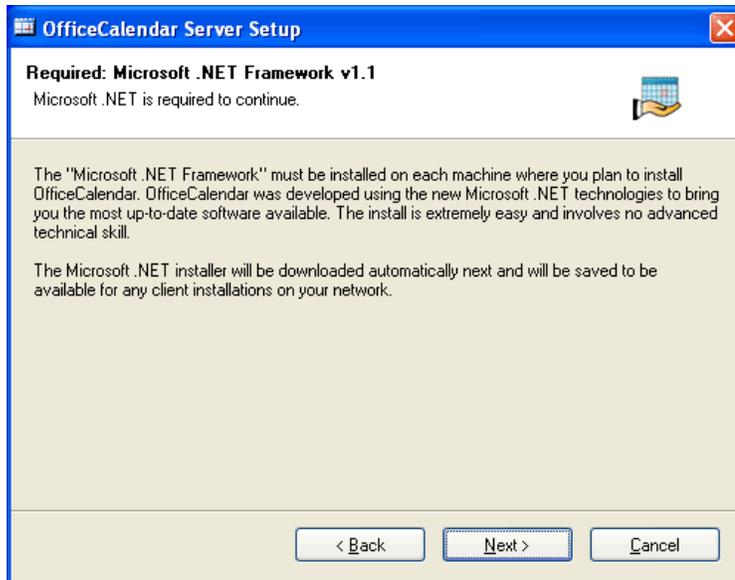
To install the Microsoft .NET Framework:

a. Click **Next** to proceed with the .NET Framework download.
b. Once the download has completed you will see the screen below; click **OK** to start the .NET Framework installer.
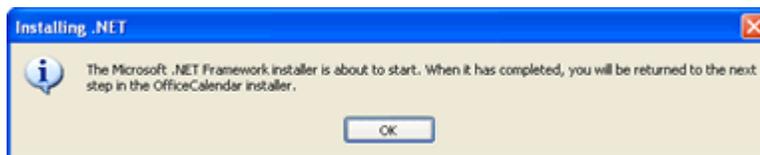
c. Review the license agreement for the Microsoft .NET Framework, then click the **I agree** radio button; and click the **Install** button to proceed.

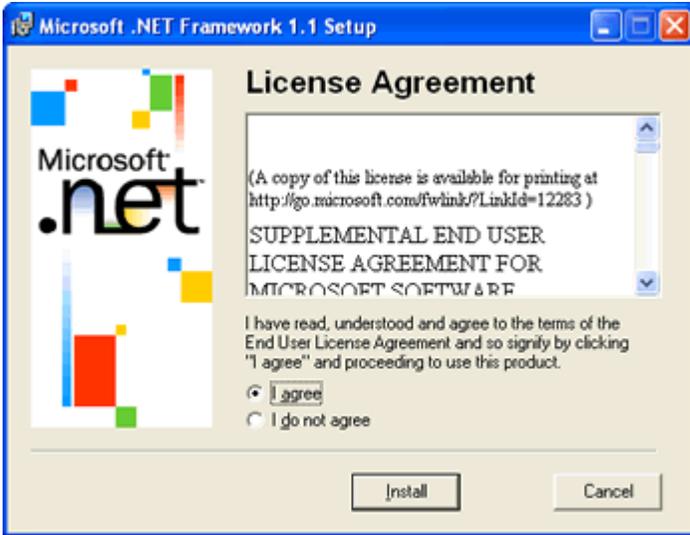d. When the .NET Framework installation is complete you'll see the dialog box below; click **OK** to return to the OfficeCalendar Server installation.

5. Select an installation folder for the OfficeCalendar Server (for ease of support we recommend that you choose the default location of **C:\Program Files\OfficeCalendar Server**); and click **Next**.
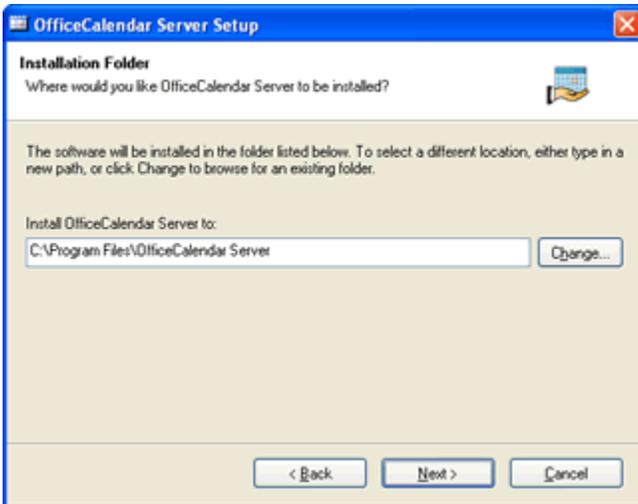
6. Select an installation folder for the OfficeCalendar Client installation files (for ease of support we recommend that you choose the default location of **C:\ocalclient**), and click **Next**.
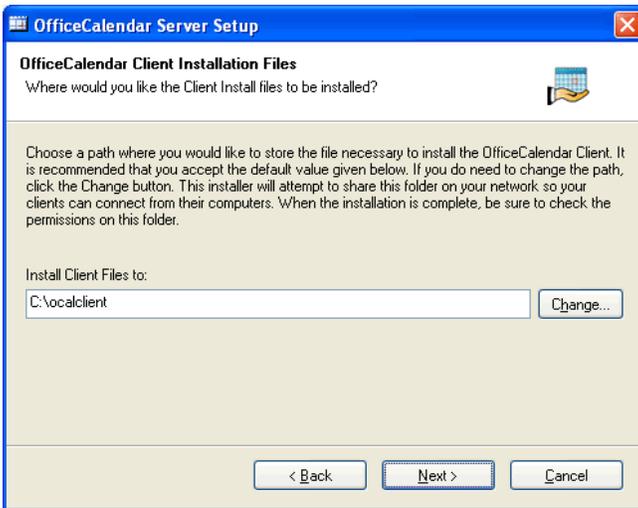
7. Please read the OfficeCalendar license agreement; click the *I agree to the terms of this license agreement* radio button; and click **Next**.
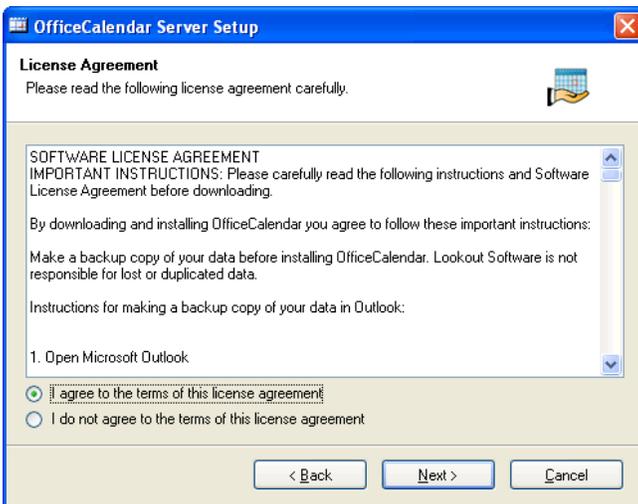
8. From the **Ready to Install** dialog box; click **Next**.
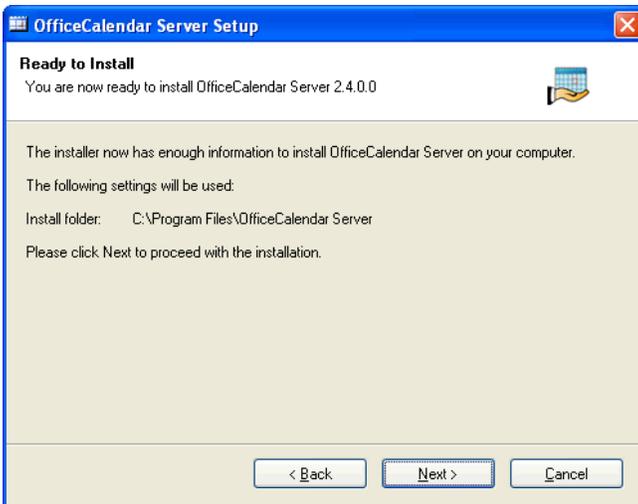
9. Once the OfficeCalendar Server setup has successfully installed; click **Next**.
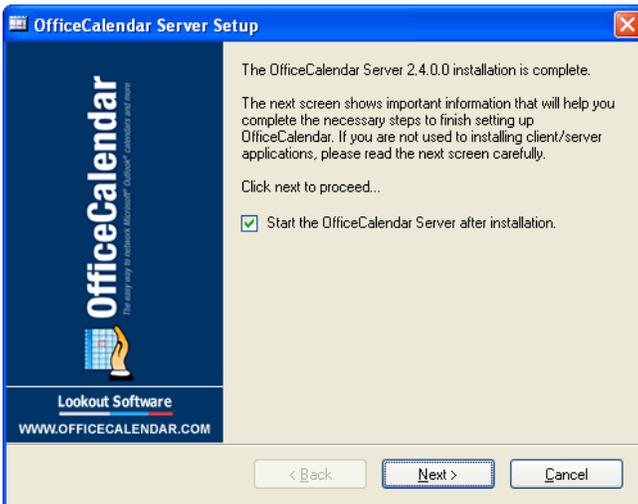
10. The **What's Next** screen briefly describes the steps you'll need to perform after installing the OfficeCalendar Server. Please take a minute to read through the **What's Next** screen text, and click **Next**.
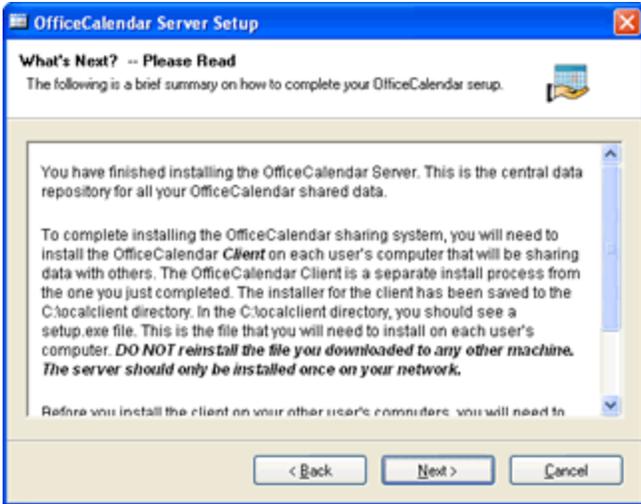
11. From the **Install Client Here?** screen, choose whether or not you want to install the OfficeCalendar Client software on this computer, and click **Finish**. Proceed to *step 12* if you chose to install the OfficeCalendar Client software on this computer. Proceed to the topic *"Adding User Accounts to the OfficeCalendar Server"* on *page 14* if you chose not to install the OfficeCalendar Client software on this computer. See the below further explanation of this screen if needed.
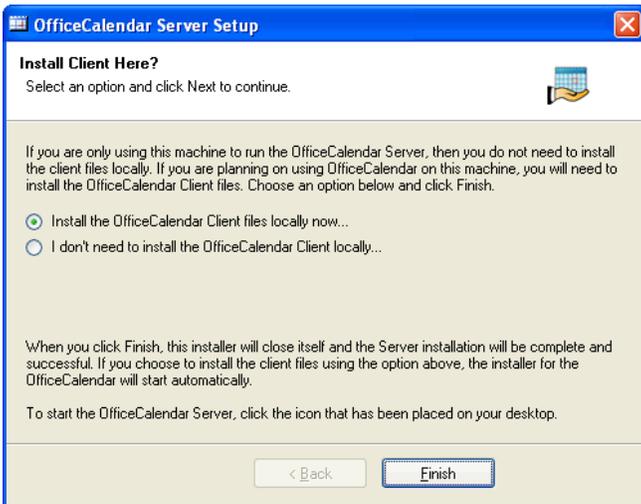
Install Client Here?

You do not need to install the Client files if you are only using this particular computer to run the OfficeCalendar Server. Select Install the OfficeCalendar Client files locally now... option if someone is using Microsoft Outlook on this computer and wants to share Outlook information with other users.

12. From the OfficeCalendar Client Setup **Welcome** screen, click **Next**.
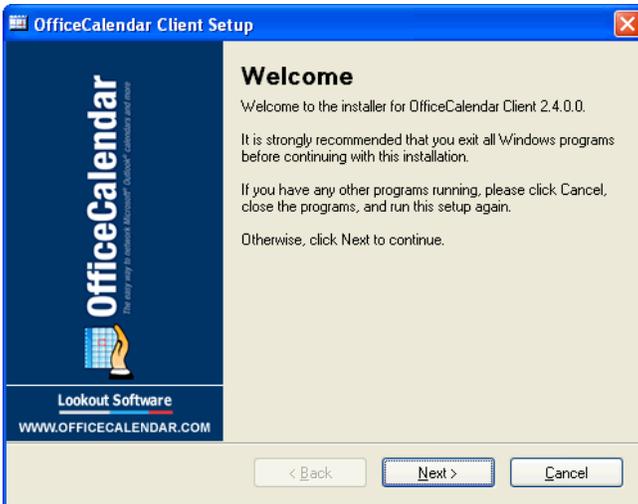
13. From the OfficeCalendar Client Setup **Installation Folder** screen, choose a folder to install the OfficeCalendar Client software to, and click **Next**. *We suggest you use the default folder shown for ease of support.*
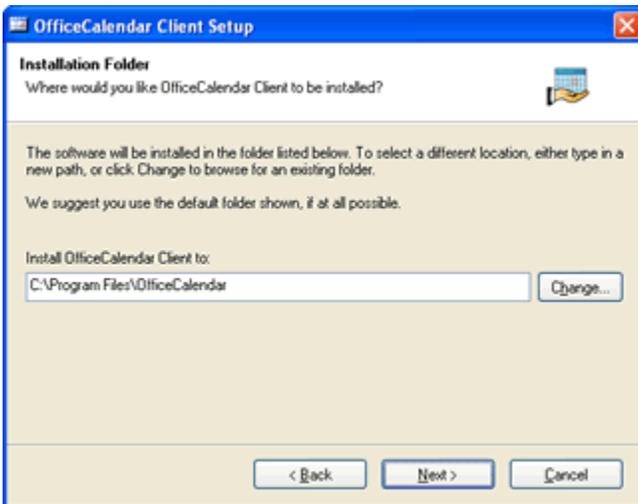
14. From the OfficeCalendar Client Setup **Ready to Install** screen, click **Next**.
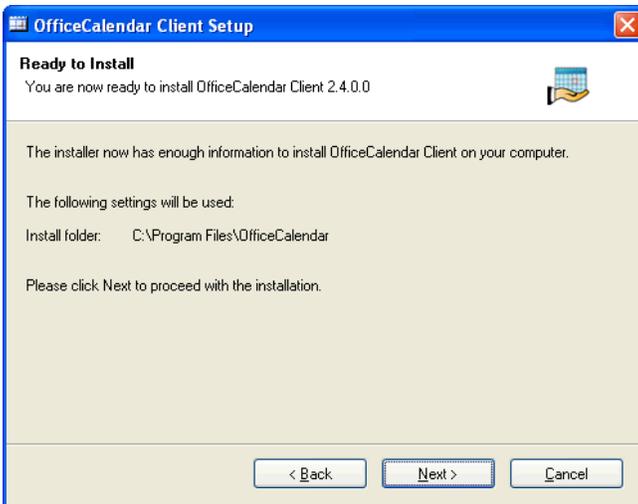
15. From the OfficeCalendar Client Setup **Almost done…** screen, click **Next**.
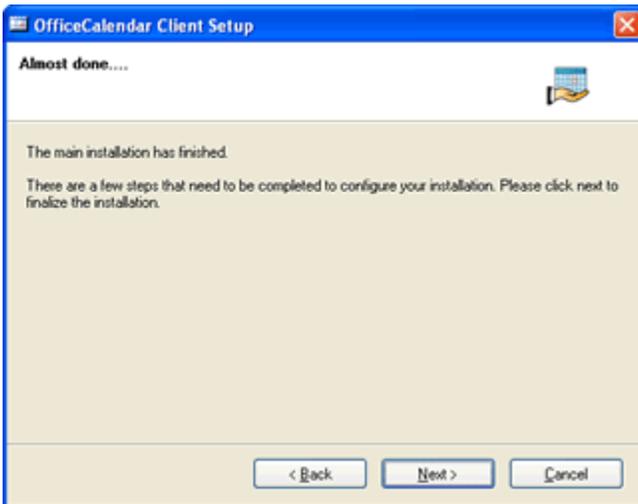
16. You will see the **Installation Successful** screen (shown below) once the installation for the OfficeCalendar Client is complete; click **Finish** to close the OfficeCalendar Client Setup, and proceed to the next topic *"Adding User Accounts to the OfficeCalendar Server"*.
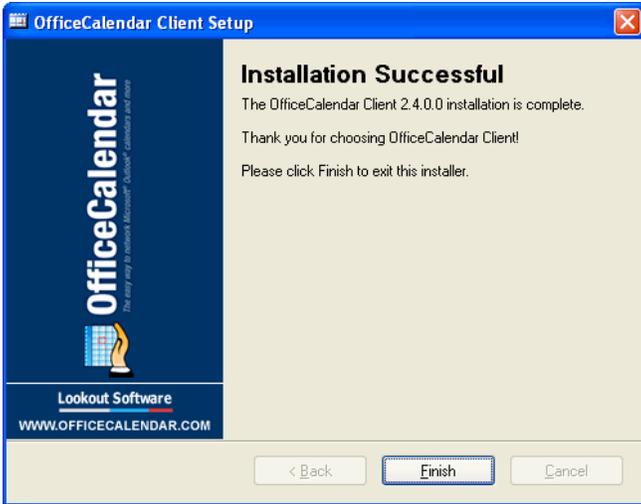
Adding User Accounts to the OfficeCalendar Server

Once you have installed the OfficeCalendar Server it is best to create user accounts for all of the users that will use OfficeCalendar before proceeding to the OfficeCalendar Client installation.

1. Start the OfficeCalendar Server by clicking on the **OfficeCalendar Server** icon.

2. The OfficeCalendar Server and Administration console screen will appear.
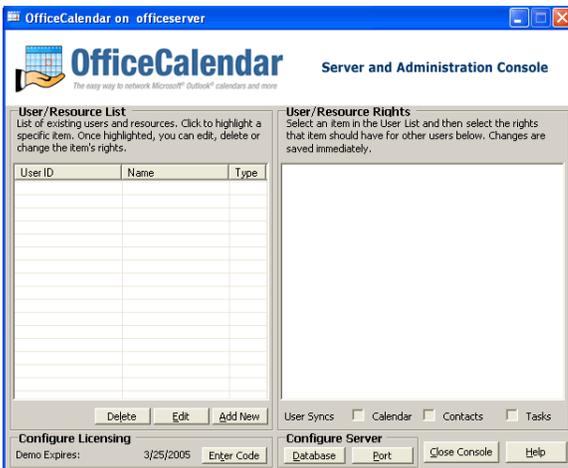
3. From the OfficeCalendar Server Administration console click the **Add New** button.

4. Enter a username, password, the first name, last name, folder name (this is what will be displayed in other people's Outlook folder list) for the first user you wish to add to OfficeCalendar; assign the default security rights for the user you are adding; and click **Save and New** or **Save and Close**.

5. You will see a screen titled **Remember Login Information!** after saving a new OfficeCalendar administrator. In order to log into the OfficeCalendar Server and Administration console you will need to remember this username and password – if you are setting up administrator account for another person, be sure to let them know the username and password. Only those users that need to access administrative functions (creating/editing/deleting users accounts, user security rights, etc) need to be assigned as an administrator in OfficeCalendar.
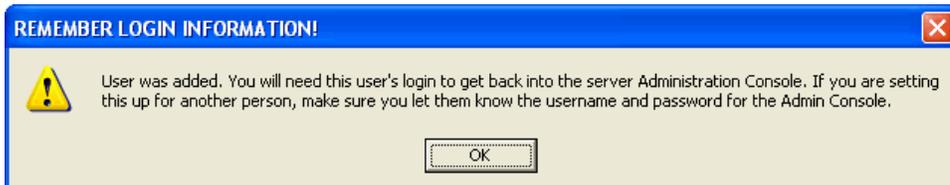
6. Repeat *steps 3 and 4* until you have finished adding all users.

Quick Tip

Check the the **User is OfficeCalendar Administrator** check box if the user you are adding will administer the OfficeCalendar Server. At least one user must be an OfficeCalendar Server administrator, and thus the first user you add must be an OfficeCalendar Server Administrator. You may assign more than one user as an Administrator.
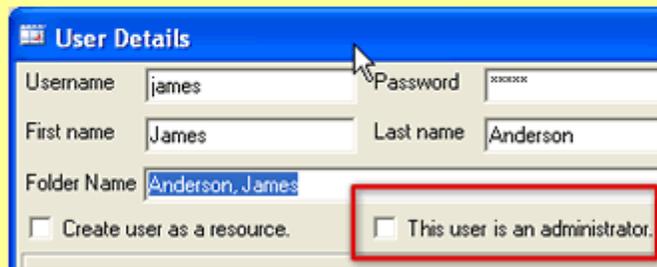
Ensure that the OfficeCalendar Client Installation Folder is shared on your network

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.

ocalclient

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.

ocalclient

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 Add-on Client on Microsoft® Outlook Workstations

1. From each workstation where you are installing the OfficeCalendar Outlook add-in Client, browse to the **c:\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"** is the OfficeCalendar Server's computer name.)
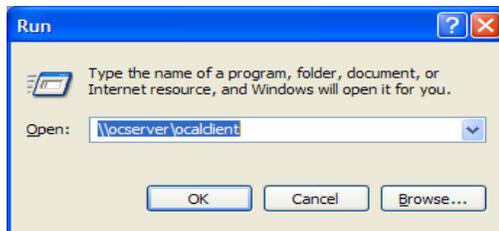
Quick Tip

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 Setup **Welcome** screen, click **Next**.
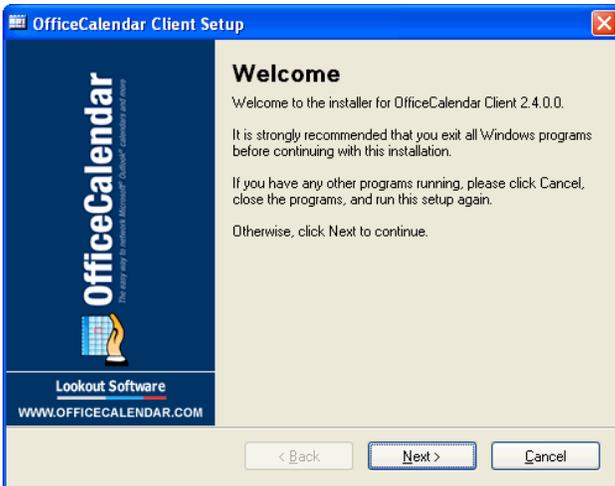
4. If you <u>do not</u> have Microsoft's .NET Framework installed on your computer you will see the screen below – please proceed to *step 4a* below. If you do have the Microsoft .NET Framework installed on your computer you will not see the screen below - please proceed to *step 5*.
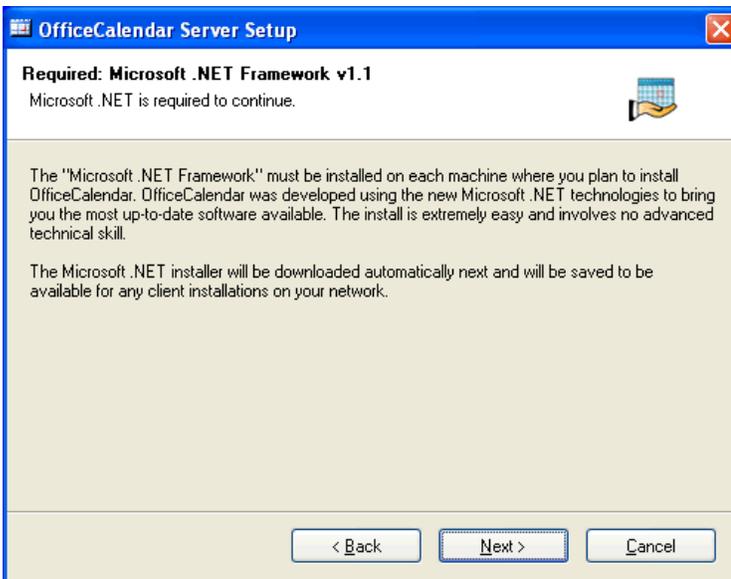
To Install the Microsoft .NET Framework:

a. Click Next to proceed with the .NET Framework download.

   Please wait while the .NET Framework is downloaded (Note: this may take several minutes)…

b. Once the .NET Framework download has completed you will see the screen below; click **OK**. Click **Yes** to start the .NET Framework installation.
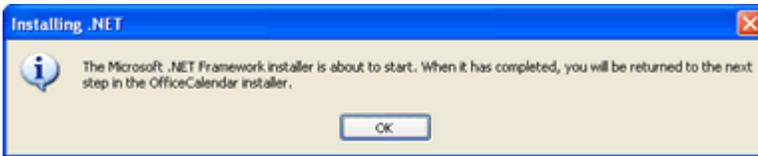
Please wait while the .NET Framework files are extracted for installation…

    c. Review the license agreement for the Microsoft .NET Framework, then click the **I agree** radio button; and click the **Install** button to proceed.

Please wait while the .NET framework installs…
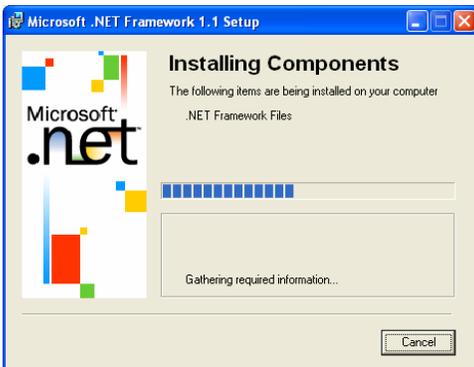
    d. When the .NET Framework installation is complete you'll see the dialog box below; click **OK** to return to the OfficeCalendar Client installation process.

5. 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**.
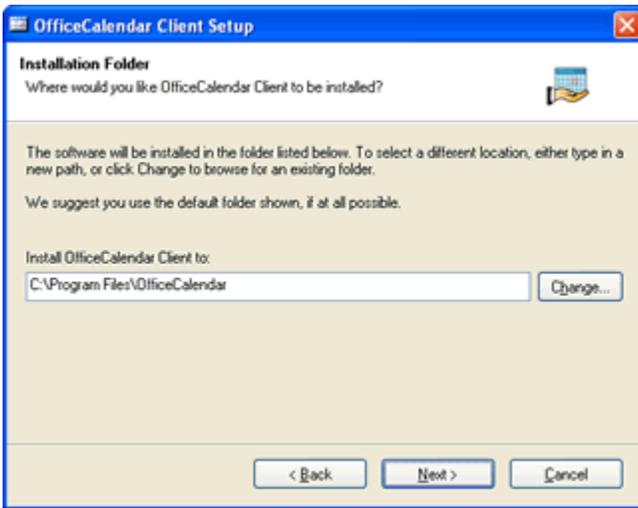
6. From the *Ready to Install* screen; click **Next**.
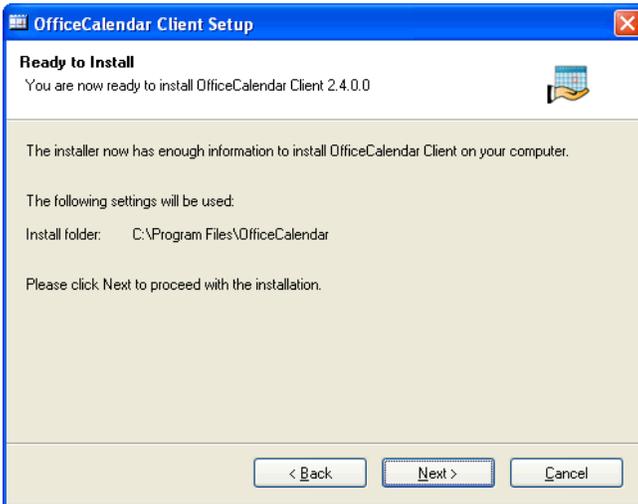
Please wait while the OfficeCalendar Client installs…

7. From the **Almost done**… screen, click **Next**.
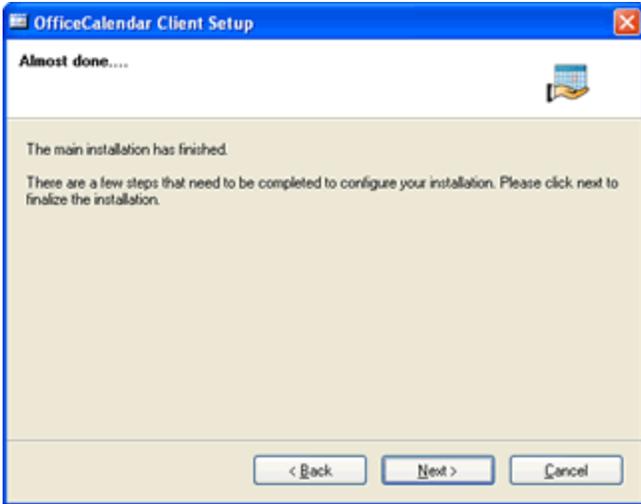
8. Click **Finish** when the OfficeCalendar Client installation is complete.

9. Start Microsoft Outlook on your computer.

   The OfficeCalendar Client added two icons to your Microsoft Outlook toolbar once installed (shown in the Illustration below).
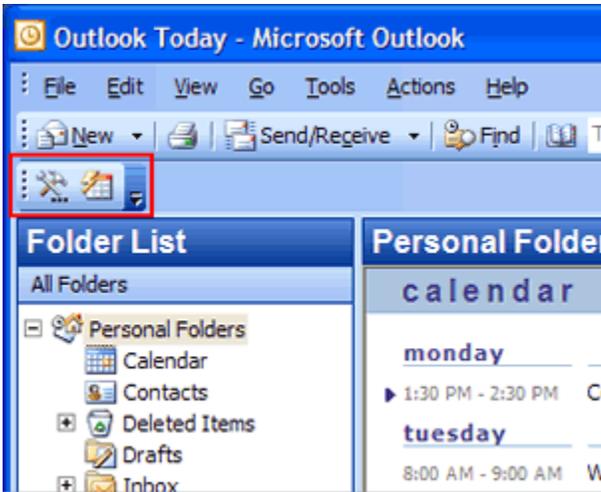
Click on the **Synchronize OfficeCalendar** icon.

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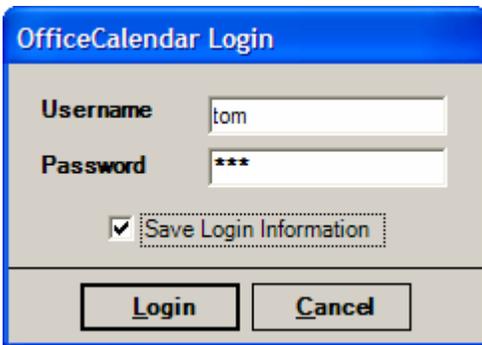
You'll notice that the synchronization icon will change states to while your Outlook is synchronizing with the OfficeCalendar Server. Once the synchronization is complete it will change back to its original state.

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, along with an additional folder under your **Calendars** folder called **Group Calendar**. New folders will appear after other OfficeCalendar users synchronize their Outlook with the OfficeCalendar Server for the first time.

If you are the first person to synchronize with the OfficeCalendar Server 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.
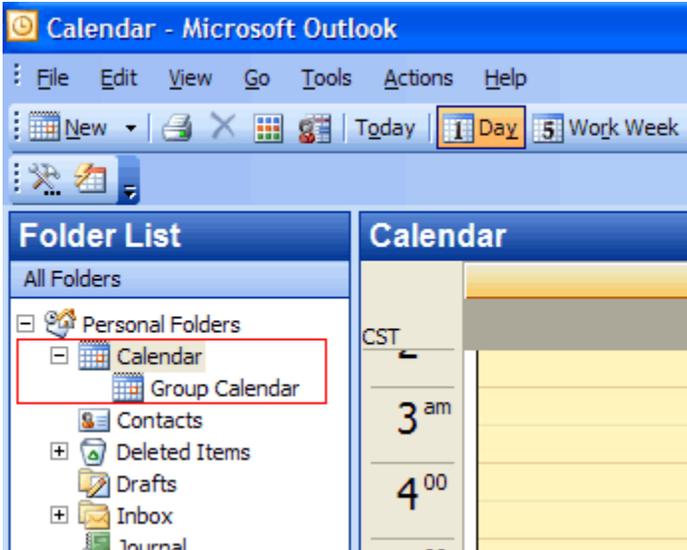
Once other users have synchronized their Outlook data with the OfficeCalendar Server, their folders will appear in your Outlook folder list during your subsequent synchronizations.

OfficeCalendar
Lookout Software
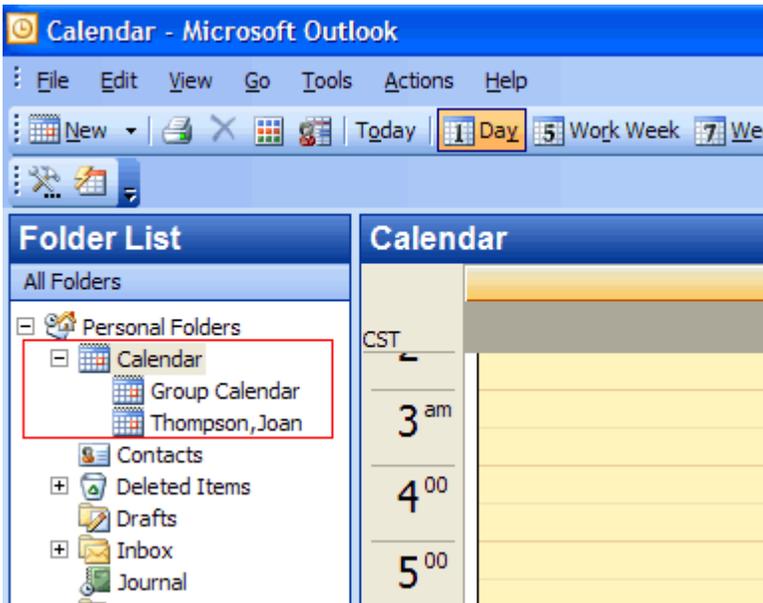
Administering OfficeCalendar

OfficeCalendar provides several options for administering user accounts and security as well as advanced settings for network administrators. All of the administration for OfficeCalendar is done from one simplified screen: the **OfficeCalendar Server and Administration Console**.

From the OfficeCalendar Server and Administration Console you can:

- Add, edit, and delete user accounts and shared resource folders.
- Set a user's security access to other Outlook user and resource calendars, contacts and tasks information.
- Configure advanced network settings such as OfficeCalendar's designated network port settings
- And more...

To access the OfficeCalendar Server and Administration Console double-click on the **OfficeCalendar Server** icon if the OfficeCalendar Server is not already running.
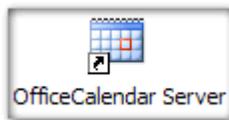
If the OfficeCalendar Server is running right-click on the OfficeCalendar Server icon in the Windows task tray, and select **Show Admin Console**.

Adding New OfficeCalendar User Accounts

1. Open the **OfficeCalendar Server and Administration Console**.

2. Click the **Add New** button.

   Add New

3. Enter the **user name**, **first name**, **last name**, and **password** for the user you wish to add to OfficeCalendar; type in a unique name to display the folder on user's Outlook folder list in the **Folder Name** field (optional); and assign the basic security rights for the user you are adding by clicking on the appropriate radio buttons (you may assign more detailed security rights once you've added each user).
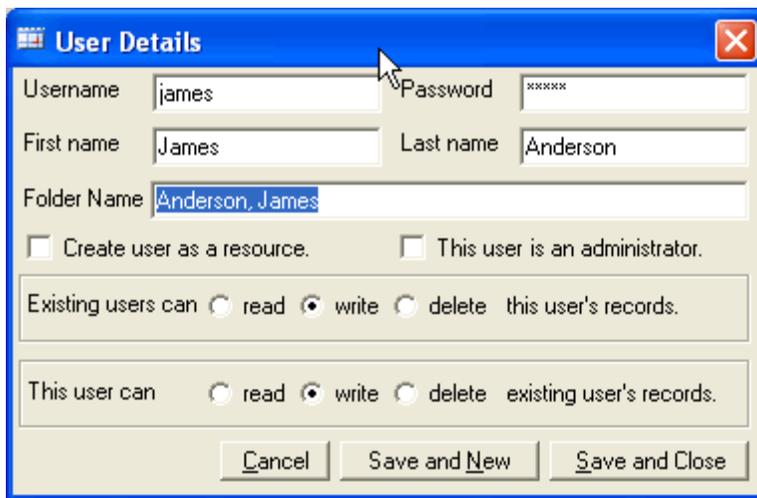
If the user you are adding will administer the OfficeCalendar Server, be sure to check the **This user is an administrator** check box. At least one OfficeCalendar user must be assigned as an administrator, and thus the first user you add to OfficeCalendar will be automatically assigned as an OfficeCalendar Server Administrator. More than one user can be can be assigned as an OfficeCalendar Administrator.

4. Save the user account information you've added:

   A). Click **Save and New** to finish adding the user to the OfficeCalendar Server, and immediately add a new user.

   Save and New

   -Or-
   B.) Click **Save and Close** if you do not wish to add any other users.
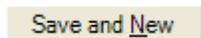
   Save and Close
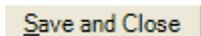
Editing OfficeCalendar User Accounts

1. Open the OfficeCalendar Server and Administration Console.

2. Highlight the user account you want to edit in the **User List**, and click the **Edit** button.

3. Edit the user's details.

4. Click **Save and Close**.

Deleting OfficeCalendar User Accounts

1. Open the OfficeCalendar Server and Administration Console.

2. Highlight the user account you want to edit in the **User List**.

3. Click the **Delete** button; a message will appear asking to confirm the action to delete the user; select **Yes** if you are sure you want to delete the user.

Deleting a user from OfficeCalendar will free up an additional user license. However, when an OfficeCalendar user account is deleted, the deleted user account information will remain in the OfficeCalendar database. This is done to notify the OfficeCalendar Client software for others users that User X no longer exists, and thus Users X's subfolders are removed from their Microsoft Outlook folder structure. Once a user is deleted, you can NOT add it back to the OfficeCalendar database. You will need to create a new user account with a unique **First Name + Last Name** combination.

Setting a User's Security Rights in OfficeCalendar

OfficeCalendar provides a full complement of security settings that can be applied to each user. This allows the OfficeCalendar administrator to easily determine for each user whose calendars they can see; whose calendar information they can add/edit; and which calendars from which they can delete information.

There are four types of security settings that can be applied to an OfficeCalendar user:

▪ Read – check the **Read** access checkbox to allow a user to view another user's specified Outlook object (calendar, contacts, and/or tasks). By default, every new user you add to OfficeCalendar has Read access to all other user's Outlook objects.

▪ Write – check the **Write** access checkbox to allow a user to add new items to, and modify existing items of, other specified user's Outlook object (calendar,

OfficeCalendar
Lookout Software

contacts, and/or tasks). By default, every new user you add to OfficeCalendar has Write access to all other user's Outlook objects.

- Delete - check the **Delete** access checkbox to allow a user to delete items from other specified user's Outlook objects. By default, delete access is not selected when adding a new user to OfficeCalendar. **NOTE: Use caution when granting another user Delete access. Information can easily be inadvertently deleted and is not easily recoverable, if recoverable at all.**

- Administrator – check this box for each user you want to give access to the OfficeCalendar Server Administration Console. It is a good practice to have at least two individuals marked as "administrator" in OfficeCalendar. Once marked as administrator, a user can log into the OfficeCalendar Server and Administration Console with their user account's user name and password.

To set a user's access to other user's Outlook objects (calendar, contacts, and/or tasks):

1. Open and log into the OfficeCalendar Server and Administration Console.

2. From the **User List**, highlight the user account you want to edit.

3. Choose the security setting you want the user to have with respect to each other OfficeCalendar user's Outlook objects (calendar, contacts, and/or tasks) by checking and/or un-checking the corresponding access.

When changing security settings for an OfficeCalendar user, each time you change a setting by checking or un-checking a box, the security setting is automatically saved without the need to perform any further action.

Sample Security Settings

In the following example we will set William Brown's security access to the following criteria:

- William can read, write/edit, and delete appointments on Cindy Anderson's, Jamie Thompson's, Andy Jackson's calendars; but has no access their contacts and tasks.
- William has no access Jenna Black's Outlook items.

User List
List of Existing Users available. Click to highlight a specific user. Once highlighted, you can edit, delete or change the user's rights.

User ID	Name	
william	William Brown	
cindy	Cindy Anderson	
jamie	Jamie Thompson	
andy	Andy Jackson	
jenna	Jenna Black	

User Rights
Select a user by clicking on their name in the User List; and then select the rights they have for other users below. Changes are saved immediately.

User	Folder Type	Read	Write	Delete
cindy	Calendars	☑	☑	☑
cindy	Contacts	☐	☐	☐
cindy	Tasks	☐	☐	☐
jamie	Calendars	☑	☑	☑
jamie	Contacts	☐	☐	☐
jamie	Tasks	☐	☐	☐
andy	Calendars	☑	☑	☑
andy	Contacts	☐	☐	☐
andy	Tasks	☐	☐	☐
jenna	Calendars	☐	☐	☐
jenna	Contacts	☐	☐	☐
jenna	Tasks	☐	☐	☐

Note about "Read" Security Access:

In the example above, William does not have **Read** access to Cindy's, Jamie's, or Andy's contact or task items. Therefore, OfficeCalendar will not create **Contacts** or **Tasks** sub-folders for Cindy, Jamie, or Andy in William's copy of Microsoft Outlook.

Another important thing to note is that along with not adding any sub-folders for Jenna, the Group Calendar folder under William's main Outlook Calendar folder will not include any items for Jenna; it will only show items for himself, Cindy, Jamie, and Andy.

Managing OfficeCalendar shared resource folder accounts

With OfficeCalendar you can create and share Outlook Calendar and Contacts resource folders. Resource folders are Calendar and Contacts folders that are not necessarily associated with a user, although they could be if you wish to use them for that specific purpose. Resource folders are defined Calendar and Contacts folders in Outlook which are typically used for things like a company contacts folder, firm-wide trial calendar (for attorneys), conference room scheduler, etc.

You can NOT create shared Tasks resource folders with OfficeCalendar.

Adding shared resource folder accounts

Adding a shared resource folder account is almost identical to creating an OfficeCalendar user account. To add a shared resource folder account to OfficeCalendar:

1. Open the **OfficeCalendar Server and Administration Console**.

2. Click the **Add New** button.

Add New

3. Enter a **user name**, **first name**, **last name**, and **password** for the resource account you wish to add to OfficeCalendar; type in a unique name to display the folder on user's Outlook folder list in the **Folder Name** field (optional); check the box **Create user as a resource**; and assign the basic security rights for the user you are adding by clicking on the appropriate radio buttons (you may assign more detailed security rights once you've added each user).

4. Save the resource folder account information you've added:

    A). Click **Save and New** to finish adding the user to the OfficeCalendar Server, and immediately add a new user.

    Save and New

    -Or-
    B.) Click **Save and Close** if you do not wish to add any other users.

    Save and Close

Editing and deleting shared resource folder accounts

The same procedures used to edit and delete OfficeCalendar user accounts are used for editing and deleting OfficeCalendar shared resource folder accounts. Also, the same procedure used to set OfficeCalendar user account security is used to set security for OfficeCalendar shared resource folders.

Configuring OfficeCalendar to Work Over a Specified Network Port

By default OfficeCalendar communicates across networks on port number 1802. Network administrators my either need to know this port number for a specific purpose, or change it if it conflicts with another application that communicates across the same port. Also, if you have users that synchronize their Outlook calendars across the Internet, your network administrator may need to open or create and exception port 1802 on the company's firewall for Microsoft Outlook and OfficeCalendar.

The port number setting for OfficeCalendar is configured on both the OfficeCalendar Server and the OfficeCalendar Client (Outlook add-in). Thus, if you change the port number at the OfficeCalendar Server, you will need to change the port number setting on <u>ALL</u> OfficeCalendar Clients from within Microsoft Outlook.

To change the port number setting on the OfficeCalendar Server

1. Open the OfficeCalendar Server and Administration Console.

2. Click the **Port** button.

3. From the **Configure Server Port Number** dialog box, change the **Port Number**, and click **Save**.

To change the port number setting on the OfficeCalendar Client to correspond with the OfficeCalendar Server

1. Open Microsoft Outlook.

2. Click on the **Configure OfficeCalendar** icon.

3. From the **Configure OfficeCalendar** dialog box click on the **Server Connections** tab, type in the **Port Number**, and click **Save**.

4. In order for the port a number change to take effect, you must close and re-open Microsoft Outlook.

5. Repeat *steps 1 through 4* until all other Outlook Clients that have the OfficeCalendar Outlook add-in Client installed.

Configuring the OfficeCalendar Client

Each OfficeCalendar user has configuration settings that allow them to connect to the OfficeCalendar Server; pre-set how often OfficeCalendar will automatically synchronize with the OfficeCalendar Server for the purpose of sending and receiving updates; switch between working online and offline with the OfficeCalendar Server while using Outlook; and more.

To open the OfficeCalendar Client configuration settings simply click on the **Configure OfficeCalendar** icon from any computer Outlook and the OfficeCalendar Outlook add-on are installed.

The OfficeCalendar Client Configuration screen has several tabs that enable users to easily navigate to the appropriate area of configuration. The first tab-screen that appears upon opening the OfficeCalendar Client Configuration screen is titled **Sync Settings**. You'll also see the tabs **Server Connections**, **User Details**, **Support** and **About** on the **Configure OfficeCalendar** screen as well.
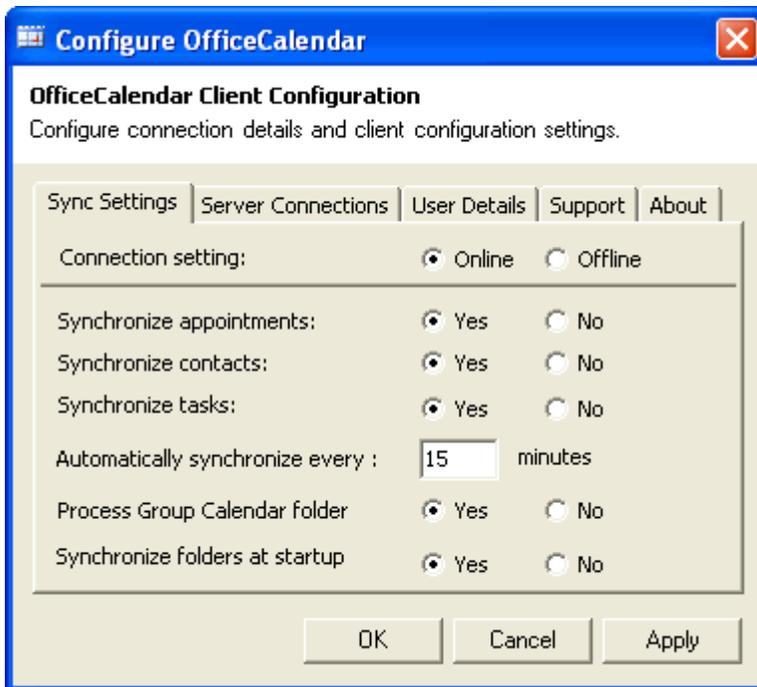
The Sync Settings Tab

The **Sync Settings** tab includes the following configuration options:

- **Connection Setting** – this allows the user to choose whether or not they want to work online or offline from the OfficeCalendar Server while working in Microsoft Outlook. This is a useful feature for users with notebook computers, particularly where work is often performed while away from the office, and the notebook computer is not connected to the office's LAN (local area network). Selecting the **Offline** radio button will turn off "*Can't find OfficeCalendar Server*" prompts, which occur each time OfficeCalendar tries to synchronize updates with the OfficeCalendar Server and is unable to make a connection. Also, in-office desktop users may want to use this feature from time-to-time in instances where they need to work in Microsoft Outlook, while the computer that runs the OfficeCalendar Server is shut down for maintenance.

  Reference the topic "***Working Offline***" (*page 50*) for more details about this topic.

- **Synchronize appointments** – this allows the user to choose whether or not they want to synchronize their Microsoft Outlook calendar appointments with the OfficeCalendar Server. This option exists for several reasons. First, it provides an additional level of security for the end user, ensuring that their Outlook calendar appointments will never leave the confines of their computer. Second, it provides increased synchronization speed as it is one less option that OfficeCalendar has to update while synchronizing Microsoft Outlook with the OfficeCalendar Server.

- **Synchronize contacts** – this allows the user to choose whether or not they want to synchronize their Microsoft Outlook contacts with the OfficeCalendar Server. This option exists for several reasons. First, it provides an additional level of security for the end user, ensuring that their Outlook contacts will never leave the confines of their computer. Second, it provides increased synchronization speed as it is one less option that OfficeCalendar has to update while synchronizing Microsoft Outlook with the OfficeCalendar Server.

Quick Tip

The Microsoft Outlook Contacts object represents the single largest data set that OfficeCalendar synchronizes. If you have a large number of Microsoft Outlook contacts, setting the **Synchronize contacts** option to **No** could potentially improve the speed in which OfficeCalendar synchronizes with the OfficeCalendar Server and possibly improves the performance of Microsoft Outlook during OfficeCalendar synchronizations.

- **Synchronize tasks** - this allows the user to choose whether or not they want to synchronize their Microsoft Outlook tasks with the OfficeCalendar Server. This option exists for several reasons. First, it provides an additional level of security for the end user, ensuring that their Outlook tasks will never leave the confines of their computer. Second, it provides increased synchronization speed as it is one less option that OfficeCalendar has to update while synchronizing Microsoft Outlook with the OfficeCalendar Server.

- **Automatically synchronize every** – this allows the user to set how often they wish to synchronize their Outlook data with the OfficeCalendar Server. The default setting for this field is 15 minutes. While we do not recommend that you set this field for less than 15 minutes, it can be set as low as 10 minutes for those that need more frequent updates. A user can, however, click the Synchronize OfficeCalendar icon on the Outlook toolbar to manually invoke the synchronization between their Outlook and the OfficeCalendar Server any time wish to get an immediate update.

- **Process Group Calendar folder** – this allows the user to choose whether or not they want to create and process a Group Calendar within their Microsoft Outlook Calendar folder group.

  By default, OfficeCalendar creates a Group Calendar in each user's copy of Microsoft Outlook. The Outlook Group Calendar includes the selected individual's appointments as well as every user's appointment for which they have rights to view; aggregated in a single calendar view.

  This option to choose whether or not to process the Outlook Group Calendar exists for several reasons. First, a user may not have a need to view a Group Calendar within Microsoft Outlook. Choosing not to create a Group Calendar keeps their Microsoft Outlook Calendar folder cleaner and thus easier to navigate with one less folder. Second, it provides increased synchronization speed as it is one less option that OfficeCalendar has to update while synchronizing Microsoft Outlook.

  | Process Group Calendar folder | ⦿ Yes | ○ No |

  Refer to the topic "*Using the Outlook Group Calendar*" (*page 46*) for more information about OfficeCalendar's Outlook Group Calendar.

- **Synchronize folders at startup** – this allows the user to choose whether or not they want to synchronize their Microsoft calendar, contacts and tasks immediately upon the startup of Microsoft Outlook. By default, this option is set at "No." This option exists for several reasons. First, it provides the user with an immediate synchronization at startup, and voiding the set time interval that must be passed for the first synchronization to occur. Second, this option will instantly notify the user if the OfficeCalendar Server cannot be reached after trying to synchronize with the OfficeCalendar Server at startup.

  | Synchronize folders at startup | ⦿ Yes | ○ No |

  Reference the topic *"Working Offline"* (*page 50*) for more details about what to do if the OfficeCalendar Server cannot be reached.

The Server Connections Tab

As previously described, OfficeCalendar is a client/server application, whereby the OfficeCalendar Client communicates with the OfficeCalendar Server. Before the OfficeCalendar Client can communicate with the OfficeCalendar Server, two primary configuration settings must be present: the **Server Name** and the **Server Port**. The **Server Name** represents the full computer name of the computer that is running the OfficeCalendar Server (an IP address can be substituted for the computer name), and the Server Port represents the TCP port for which the OfficeCalendar Server and Client communicate over.

The **Server Connections** tab, found in the **Configure OfficeCalendar** dialog box, contains both Primary and Secondary Server connection settings. Most OfficeCalendar Client users will only need the Primary Server Name info configured

OfficeCalendar
Lookout Software

and, if the OfficeCalendar Client is installed from the shared **c:\ocalclient** folder, this info will be automatically configured. Thus, it is likely that a user will never need to do anything with these settings.
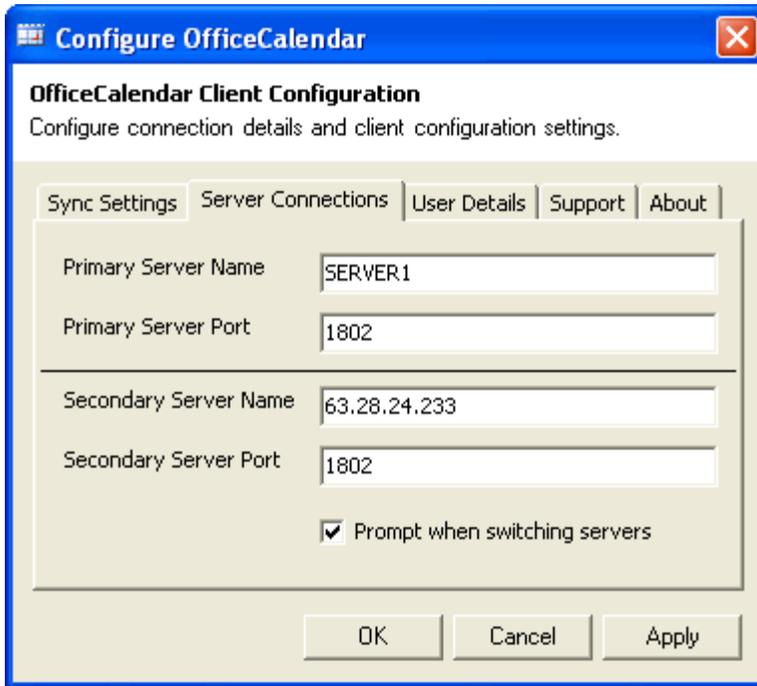
The Secondary Server info was designed to add another level of convenience for mobile notebook users that often work both in-office and out-of-office. While working in-office the user can connect via TCP using the full computer name of the OfficeCalendar Server, and while working out-of-office the user can sync to the OfficeCalendar Server over the Internet using the IP address or DNS name of the OfficeCalendar Server (see the topic *Synchronizing Outlook calendar over the Internet* for more information). When using Outlook, OfficeCalendar will always try to connect to the OfficeCalendar Server with the settings it last connected with. If it can't connect it then moves to next settings and tries to connect until it finds a way to successfully connect with OfficeCalendar Server or times out.

The User Details Tab

The **User Details** tab, found in the **Configure OfficeCalendar** dialog box, shows when the last OfficeCalendar synchronization (**Last synchronization**) was performed by the OfficeCalendar Client software, as well as who current user (**Current user**) login is set to.

A **Reset User** button is also included in the **User Details** tab, which simply resets the saved user login information.

http://www.officecalendar.com
35
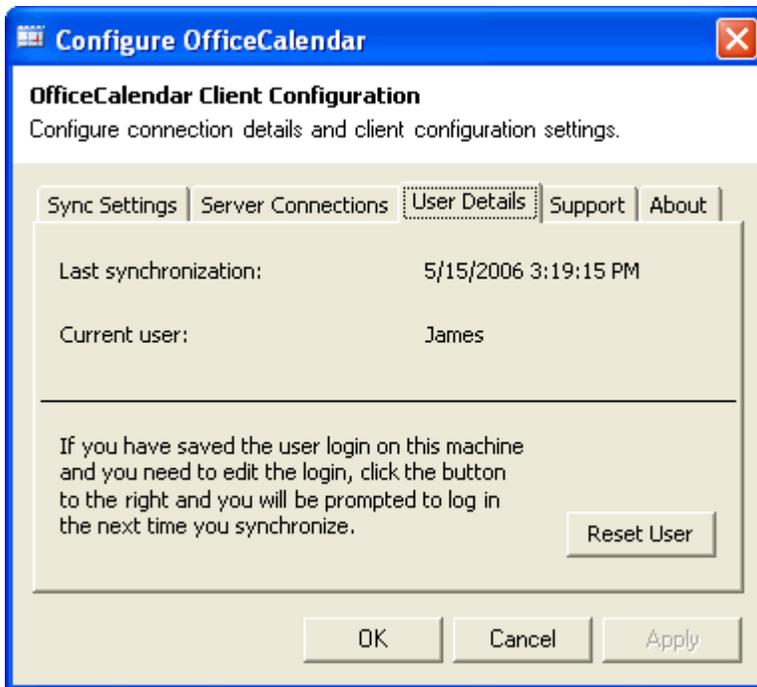
The Support Tab

The **Support** tab, found in the **Configure OfficeCalendar** dialog box, contains two buttons: **Show Files** and **Reset**.

The **Show Files** button provides access to files that can be helpful when support is necessary. These files should not be edited or removed unless under the direction of an OfficeCalendar staff member

The **Reset** button provides access to a support function when needed. This routine should only be run under the direction of an OfficeCalendar staff member.

The About Tab

The **About** tab, found in the **Configure OfficeCalendar** dialog box, contains version information and the release date of the OfficeCalendar Client software.

Synchronizing Outlook Calendars over the Internet

OfficeCalendar is designed from the ground up using Microsoft's new .NET architecture. The Microsoft .NET framework for developing applications is optimized for exchanging data over the Internet, and OfficeCalendar is no exception.

With OfficeCalendar you can share Outlook calendar, contact, and task information with your co-workers while working remotely over an Internet connection. OfficeCalendar's .NET technology makes it easy for employees working from home, remote offices, or traveling out of town to connect to your office's central OfficeCalendar Server to send and receive updates as often as they like.

You will need to have a dedicated IP address on the computer that runs your OfficeCalendar Server, or you'll need to subscribe to an inexpensive dynamic DNS service like TZO (www.tzo.com), in order to synchronize and share your Outlook calendar, contact, and task information over the Internet using OfficeCalendar.

To synchronize and share your Outlook calendar, contact, and task information with your co-workers over the Internet using OfficeCalendar:

1. Click on the **Configure OfficeCalendar** icon from within Microsoft Outlook
2. From the **Configure OfficeCalendar** dialog box, click on the **Server Connections** tab.
3. Type in the IP address (or dynamic DNS name) of your OfficeCalendar Server in the **Primary** or **Secondary Server Name** field (refer to the **Server Connections** tab on *page 35* to determine the appropriate Server Name field to use).
4. Click **Apply**, and then click **OK** to close the **Configure OfficeCalendar** dialog box.
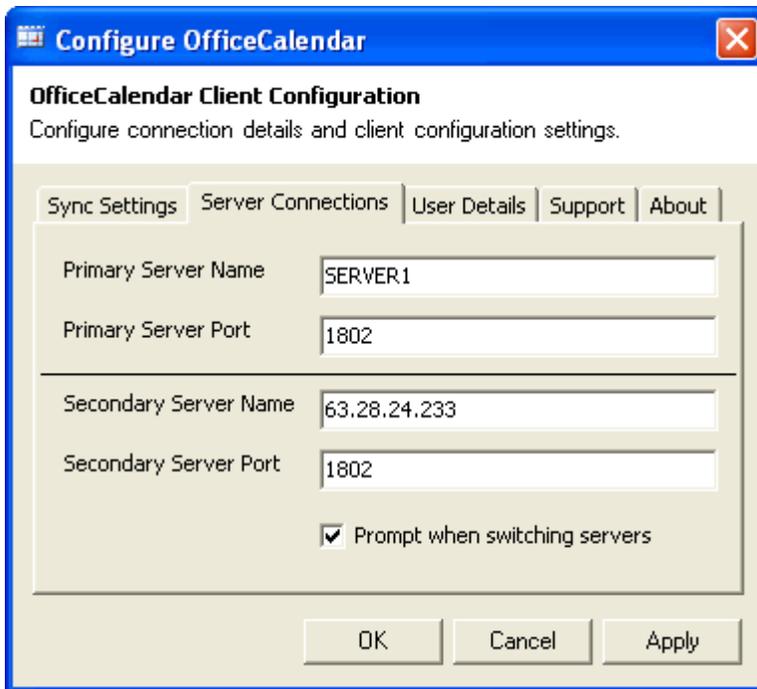
As long as Outlook is open on your computer, it will synchronize with your main office every 15 minutes, or however often your personal **"Automatically synchronize every"** duration preference is set to. You can also get instant updates by clicking on the Synchronize OfficeCalendar icon on your Outlook toolbar.

Using OfficeCalendar

Because the OfficeCalendar Outlook add-in Client becomes a part of Microsoft Outlook once it's installed, you continue to use Outlook as you always have. The only differences you'll notice about your Microsoft Outlook is the addition of the OfficeCalendar toolbar, and the addition of your co-worker's shared Outlook Calendar, Contacts and Tasks folders listed directly under your own corresponding Outlook Calendar, Contacts and Tasks folders.
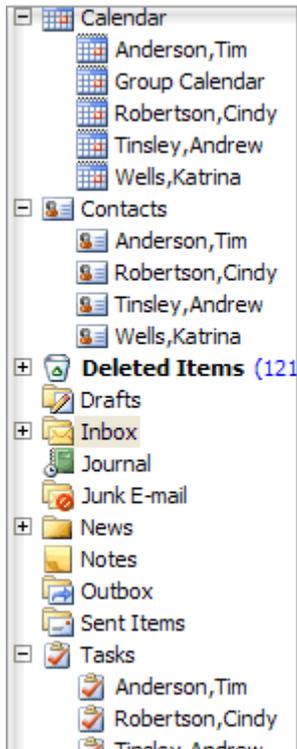
Logging into OfficeCalendar from Microsoft Outlook

The first time you open Microsoft Outlook after installing OfficeCalendar:

1. Click on the **Synchronize OfficeCalendar** icon.

2. From the **OfficeCalendar Login** dialog box, enter your assigned **Username** and **Password**.

3. If you want to save your login information so that you will not have to enter your password each time OfficeCalendar synchronizes, check the **Save Login Information** check box.

4. Click the **Login** button.

Setting how often you send and receive your Outlook's Shared Calendar, Contact, and Task Information Updates

By default, your OfficeCalendar Outlook add-on Client will synchronize with the OfficeCalendar Server to send and receive updated Outlook shared calendar, contact, and task information every 15 minutes. OfficeCalendar allows you to change this setting more or less often if you wish.

To change the frequency of your OfficeCalendar Outlook add-on Client's synchronization:

1. Open Microsoft Outlook on your computer.

2. Click on the **Configure OfficeCalendar** icon.

3. Click on the **Sync Settings** tab from the **Configure OfficeCalendar** dialog box; enter your desired synchronization duration in the **Automatically synchronize every** field; and click **Apply**, and then click **OK** to exit the **Configure OfficeCalendar** dialog box.

It is not recommended that you set the automatic synchronization time below 15 minutes because the lower value you set in this field will increase the number of requests being made across your local area network, which could potentially cause slower performance of other network applications.

Sharing Microsoft Outlook Calendars with OfficeCalendar

Viewing, entering, editing, and deleting appointments for another user is the same as entering them for yourself when using Outlook with OfficeCalendar.

The key thing to remember when viewing, adding, or editing data for other users you are sharing Outlook calendar data with is that you must navigate to the specified user's Calendar sub-folder. OfficeCalendar will automatically create sub-folders for each of your co-workers under your main Microsoft Outlook Calendar folder as shown in the illustration below.
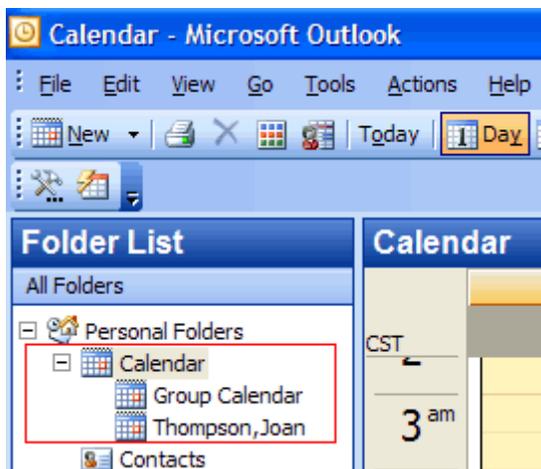
If one or more of your co-worker's calendar does not appear in your list of Outlook calendars once you have performed a few synchronizations, one of the following scenarios may apply:

- The user has not executed their first synchronization yet. Each OfficeCalendar users must run at least one synchronization before other user's can see their shared Outlook calendar information.
- The user may have selected to not synchronize their appointments with the OfficeCalendar Server.
- You do not have the minimum "Read" security access to their Outlook calendar. Contact your OfficeCalendar Administrator to inquire about having your security access changed with regards to the user in question.

Making an Appointment Private

OfficeCalendar gives you the ability to hide the details of your private appointments that you don't want others to see, even for those in which you share your Outlook calendar.

To create a private appointment:

1. Create or open the appointment that you want to make private.

2. Select the **Private** check box in the lower right corner.

3. Click **Save and Close**.

Using the Outlook Group Calendar

Once you have performed your first OfficeCalendar synchronization, you'll also notice that an extra Calendar sub-folder was created in your Outlook software program called **Group Calendar**. The OfficeCalendar Outlook Group Calendar is a Calendar folder that aggregates both your and your co-worker's appointments into one calendar. Anytime an appointment is added, edited, or deleted to/from one of your co-workers calendars, it will be updated automatically in the Outlook Group Calendar folder upon the next OfficeCalendar synchronization.

OfficeCalendar's Outlook Group Calendar is particularly useful when you need to determine two or more people's availability for a particular day and time. When viewing the OfficeCalendar Outlook Group Calendar, each appointment is identified by the corresponding person the appointment applies to by displaying their name next to the appointment's description (see screenshot below).
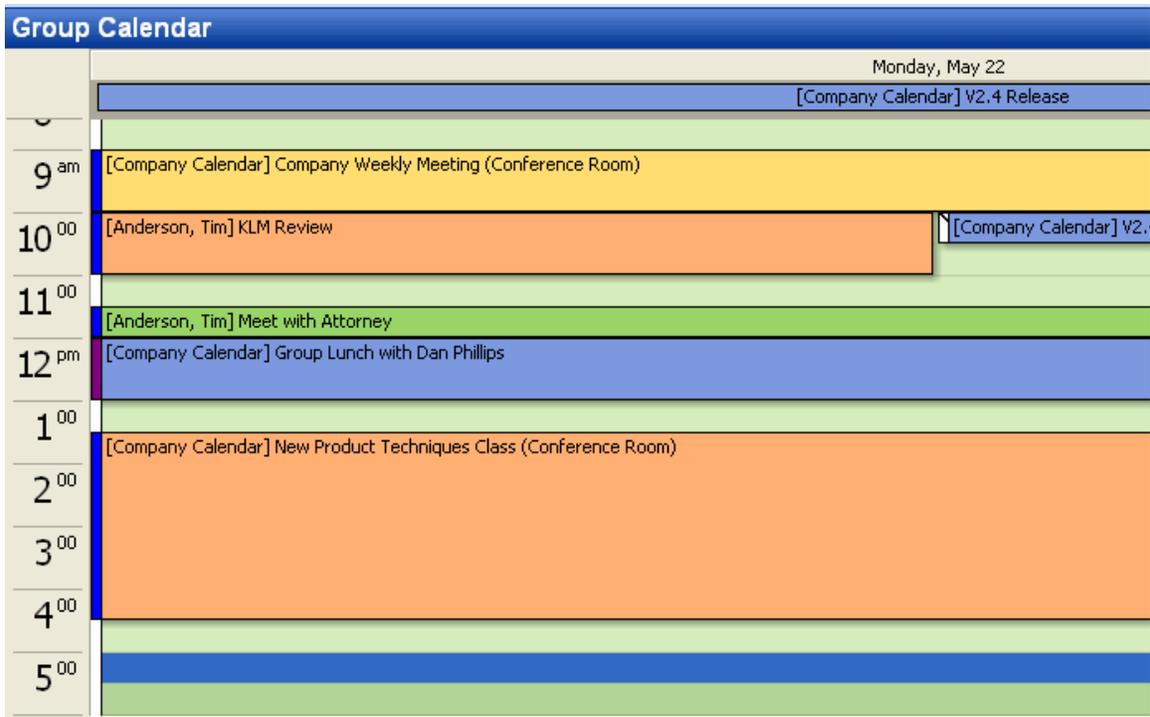
At present, OfficeCalendar's Outlook Group Calendar is only for viewing appointment information. You can not create, edit or delete appointments on the OfficeCalendar Group Calendar. If you view the OfficeCalendar Group Calendar folder and determine that an appointment needs to be created based upon a co-workers availability, then you'll need to navigate to that user's Calendar sub-folder and create, edit or delete the appointment as desired; or you can use Outlook's group scheduling/Meeting Request function to create an appointment for one or more people (see topic *Group Scheduling with OfficeCalendar's Group Calendar* for instructions). If you attempt to add, edit, or delete an appointment from the OfficeCalendar Outlook Group Calendar, it will automatically get removed from the Group Calendar upon your next synchronization.

Group Scheduling with OfficeCalendar's Outlook Group Calendar

If you wish to schedule an appointment for more than one person at a time, use Microsoft Outlook's Meeting Request function.

To create a meeting request in Microsoft Outlook:

1. From the **File** pull down menu; select **New**| **Meeting Request**.

2. In the **To** field, type in the email address of each person for which you are requesting a meeting. Optionally, you can click the **To** button and select each persons name from your Outlook Address Book if the names of each person you are inviting exist within it.

3. Complete the rest of the fields in the **Meeting** dialog box and attach files if necessary, and click **Send**.

Each person will receive an emailed meeting invitation. Once they've accepted the meeting request, it will automatically be written to their Outlook calendar, which will subsequently update their associated shared Calendar folder in your copy of Microsoft Outlook with the appointment, as well as your OfficeCalendar Outlook Group Calendar upon their next OfficeCalendar synchronization.

Sharing Microsoft Outlook Contacts with OfficeCalendar

Viewing, entering, editing, and deleting contact information for other users is the same as entering them for yourself when using Microsoft Outlook with OfficeCalendar.

The key thing you must remember when viewing, adding, or editing data for other users you are sharing Outlook contact data with is that you must navigate to the specified user's Contacts sub-folder. OfficeCalendar will automatically create sub-folders for each of your co-workers under your main Outlook contact folder as shown in the illustration below.
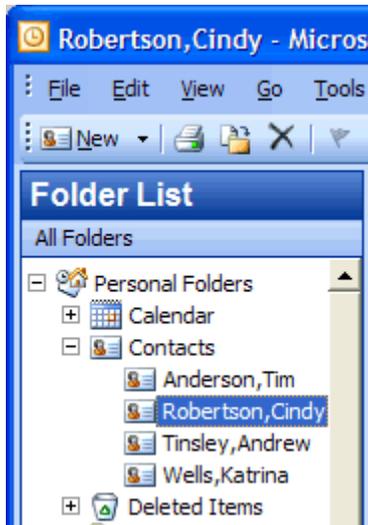
If one of your co-worker's contact folder does not appear in your list of contact folders in Microsoft Outlook after you have performed your first few synchronizations, one of the following scenarios may apply:

▪   The user has not executed their first synchronization yet.

▪   The user may have selected to not synchronize their contacts with the OfficeCalendar Server.

▪   You do not have the minimum "Read" security access to their Outlook contacts. Contact your OfficeCalendar Administrator to inquire about having your security access changed with regards to the user in question.

Making a Contact Private

OfficeCalendar gives you the ability to hide contacts that you don't want others to see, even for those in which you share Outlook contacts.

To create a private contact:

1. Create or open the contact that you want to make private.

2. Select the **Private** check box in the lower right corner.

3. Click **Save and Close**.

Your private contacts are not viewable by anyone, even by those that have permission to share your Outlook contacts.

Sharing Microsoft Outlook Tasks with OfficeCalendar

While you can view, enter, edit and delete items directly from your co-works shared Outlook Calendar and Contacts folders, sharing Outlook tasks in OfficeCalendar works differently.

In order to create or assign a task to someone else in Outlook using OfficeCalendar, you must use Outlook's built-in **Task Request** feature.

To create or assign a task to someone else:

1. Open Microsoft Outlook.

2. Click on the **File** drop down menu; select **New** | **Task Request**.

3. In the **To** field, type in the email address of each person for which you are making a Task Request. Optionally, you can click the **To** button and select each persons name from your Outlook Address Book if the names of each person you are inviting exist within it.

4. Complete the rest of the fields in the **Task Request** dialog box, attach files if necessary, and click **Send**.

Each person will be emailed a Task Request. Once accepted, the task (from your task request) will automatically be written to their Outlook task list, and will subsequently update their associated shared task folder in your copy of Microsoft Outlook with task.

The key thing you have remember with shared Outlook tasks while using OfficeCalendar is that tasks for other users can only be created by using the **Task Request** function in Microsoft Outlook. Creating tasks for yourself can be performed as normal.

If one of your co-worker's task list does not appear in your list of task folders in Outlook after you have performed your first few synchronizations, one of the following scenarios may apply:

- The user has not executed their first synchronization yet.

- The user may have selected to not synchronize their tasks with the OfficeCalendar Server.

- You do not have the minimum "Read" security access to their task list. Contact your OfficeCalendar Administrator to inquire about having your security access changed with regards to the user in question.

Creating Private Tasks

OfficeCalendar gives you the ability to hide tasks that you don't want others to see, even for those in which you share Outlook tasks.

To create a private task:

1. Create or open the task that you want to make private.

2. Select the **Private** check box in the lower right corner.

3. Click **Save and Close**.

Your private tasks are not viewable by anyone, even by those that have permission to share your Outlook tasks.

Working Offline

OfficeCalendar was specifically designed to allow laptop users to disconnect from the home office's computer network, and to continue use Microsoft Outlook while at home or on the road while working offline. Any changes made by the offline user to his/her own Outlook calendar, contacts and/or tasks; as well as other user's calendars, contacts and/or tasks will get updated as soon as the user re-connects with the office network, and runs the OfficeCalendar synchronization. Optionally, the offline user can synchronize their Outlook changes over the Internet. Refer to the topic *Synchronizing Outlook Calendars over the Internet* for more details.

Upon opening Microsoft Outlook on your computer while it is disconnected from your office's network, the **OfficeCalendar could not be reached** dialog box will appear once it tries to synchronize with the OfficeCalendar Server. To work offline, choose **Work Offline**. This will disable OfficeCalendar synchronization until it is re-enabled (switched back to **Online** mode).
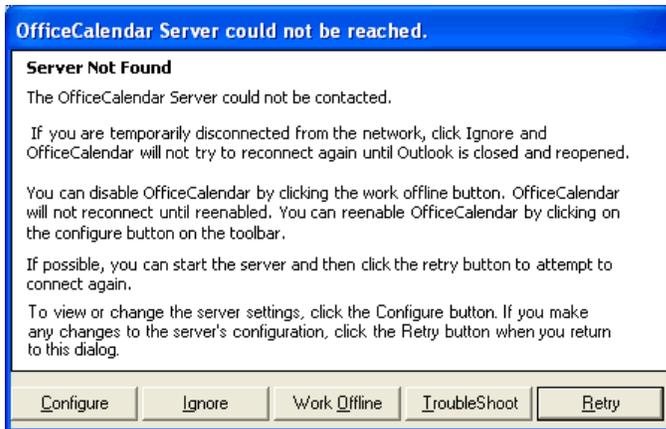
When you come back into your office, and connect to your office's network, you will want to switch back to **Online** mode. Switching to **Online** mode and running the synchronization will update all of the changes you have made to your co-workers calendar, contacts, and tasks, as well as all of the changes they have made to your Outlook calendar, contact and task information.

To re-enable OfficeCalendar to work online:

1. Open Microsoft Outlook.
2. Click on the **Configure OfficeCalendar** icon on the Microsoft Outlook toolbar.

3. From the **Sync Settings** tab click the **Work Online** radio button.
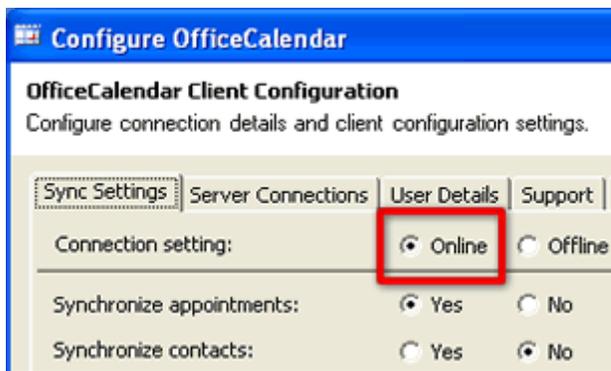
4. Click **Apply** to re-enable OfficeCalendar to work online, and then click **OK** to close **Configure OfficeCalendar** dialog box.

You will now be able to update your copy of Microsoft Outlook with your co-worker's Outlook calendar, contact, and task information, and update the OfficeCalendar Server with changes you made to Outlook since your last online work session.

Purchasing OfficeCalendar Licenses

OfficeCalendar is a highly affordable and easy-to-use alternative to Microsoft Exchange Server for sharing Outlook calendar, contact, and task information. For pricing and/or to purchase OfficeCalendar software licenses, visit our website at http://www.officecalendar.com/purchase/purchase.asp, or call/email us at:

866-847-7512 (toll free)
214-329-4500 (direct dial)
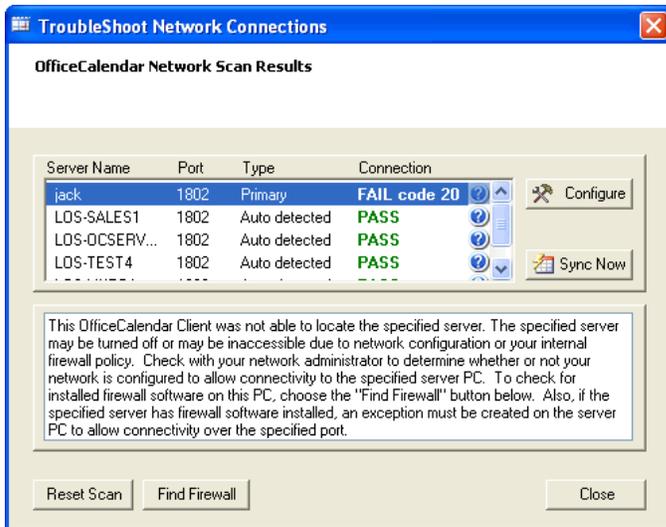sales@officecalendar.com

Getting Help with OfficeCalendar

If the OfficeCalendar Server cannot connect to your network once OfficeCalendar tries to synchronize, the **OfficeCalendar could not be reached** dialog box will appear.
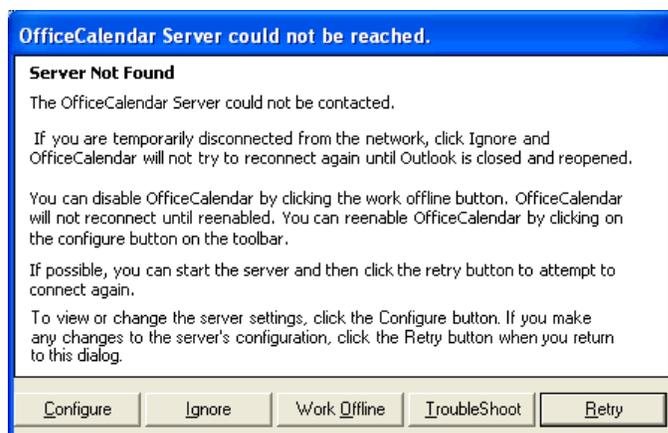
Click **Troubleshoot** to scan and test the connection between the OfficeCalendar Client and Server.
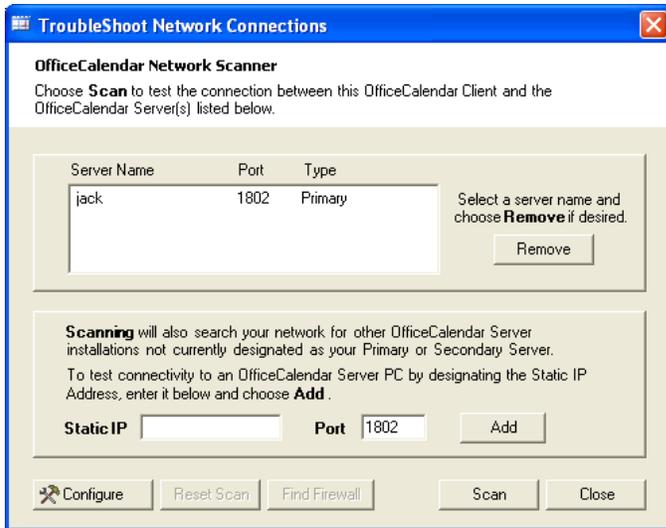
After testing the connection between your OfficeCalendar Client and Server, you may also choose to scan for installed firewall software by clicking on **Find Firewall**. Firewalls can block connectivity between your OfficeCalendar Client and Server, in which case an exception must be created.

For more help with OfficeCalendar visit our online support department at http://www.officecalendar.com/support.

Removing the OfficeCalendar Client from Outlook

To remove the OfficeCalendar Client from Outlook:

1. Close Microsoft Outlook.
2. Click **Start**; **Control Panel**.
3. From the **Control Panel** dialog click **Add or Remove Programs**.

4. Select **OfficeCalendar** from the list of **Currently Installed Programs**; and click **Remove**.
5. Follow the on-screen instructions.

Removing the OfficeCalendar Server

1. Click **Start**; **Control Panel**.
2. From the **Control Panel** dialog click **Add or Remove Programs**.
3. Select **OfficeCalendar Server** from the list of **Currently Installed Programs**; and click **Remove**.
4. Follow the on-screen instructions.