

INSTALLATION AND USER'S 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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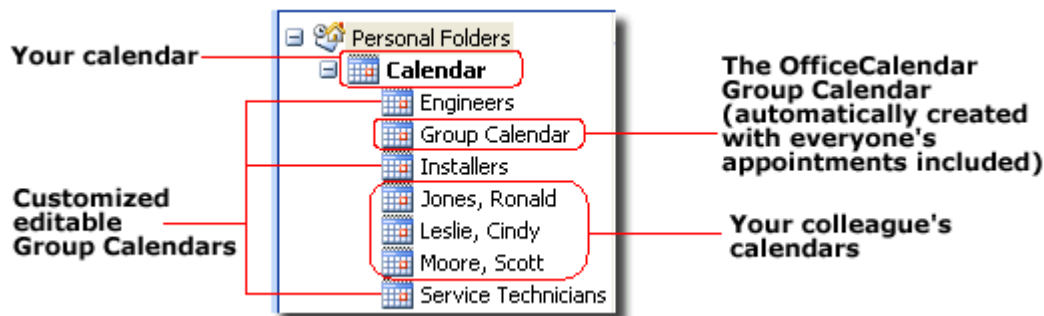
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What is OfficeCalendar? Sharing Microsoft Outlook Calendars and More...

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 editable group calendars where multiple users' Outlook calendar data is combined into a single calendar folder for easy group scheduling.

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, 2003 or 2007. However, OfficeCalendar can work with a combination 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 customized group calendars that show multiple users' appointments rolled into a single calendar view (see "Customized editable Group Calendars" caption above).

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 a 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 other people's Outlook calendar as well as communicate with the OfficeCalendar Server, which in turn passes your calendar updates to other users' 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/trial.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 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 user accounts 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.

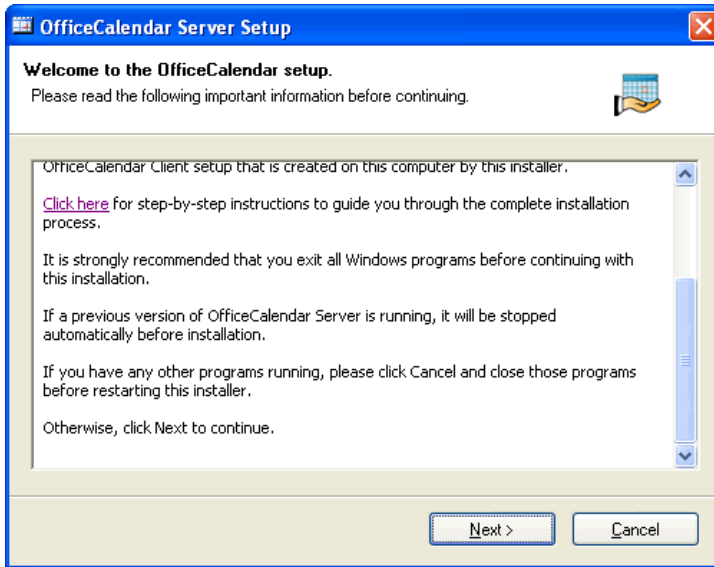
Installing the OfficeCalendar Server

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.

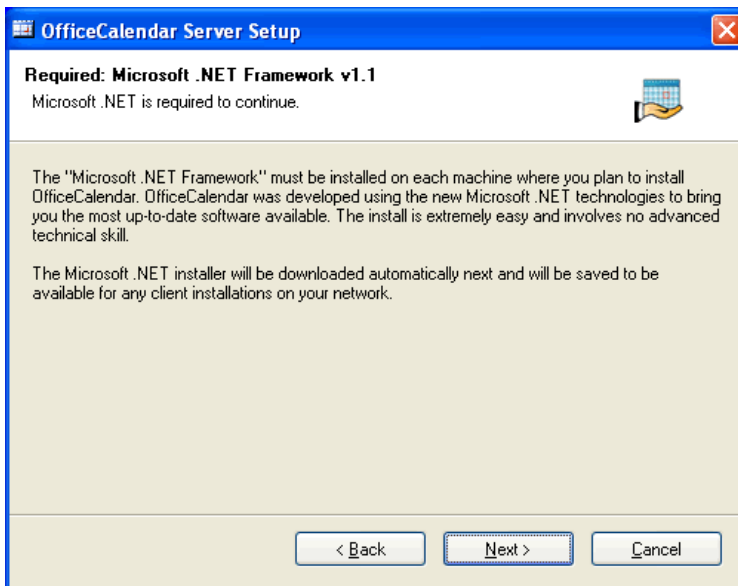


ocinstall.exe

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, the 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.

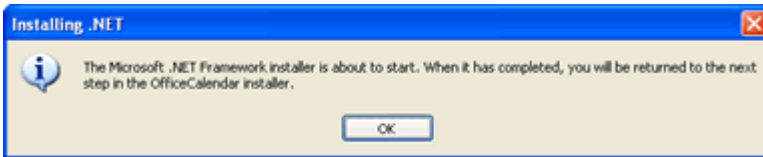


4. If you do not have Microsoft's .NET Framework installed on your computer you will see the screen below – please proceed to *step 4a*. If you do have the Microsoft .NET Framework installed on your computer you will not see the screen below -- please proceed to *step 5* (on *page 8*).

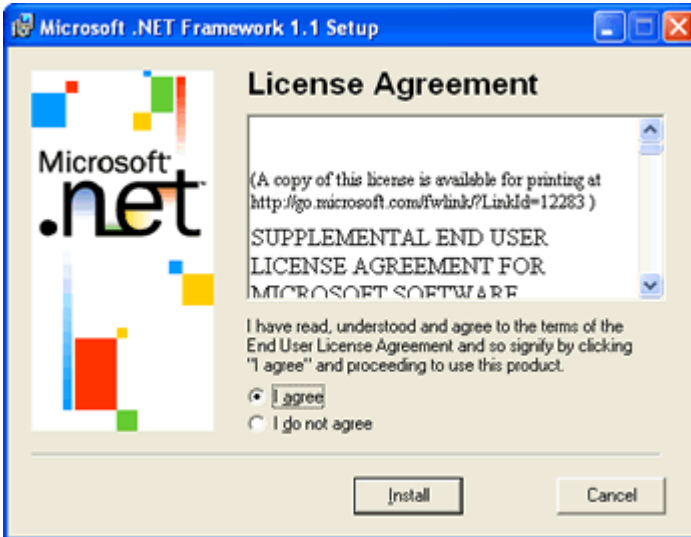


To install the Microsoft .NET Framework:

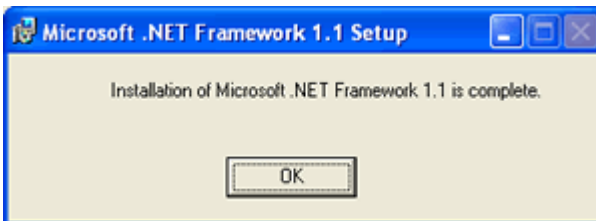
- a. Click **Next** to proceed with the .NET Framework download.
- b. Once the download has completed you will see the screen below; click **OK** to start the .NET Framework installer.



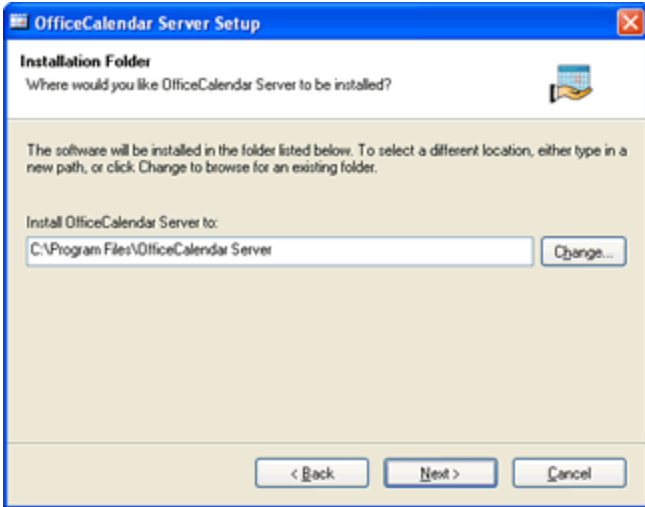
- c. Review the license agreement for the Microsoft .NET Framework, then click the **I agree** radio button; and click the **Install** button to proceed.



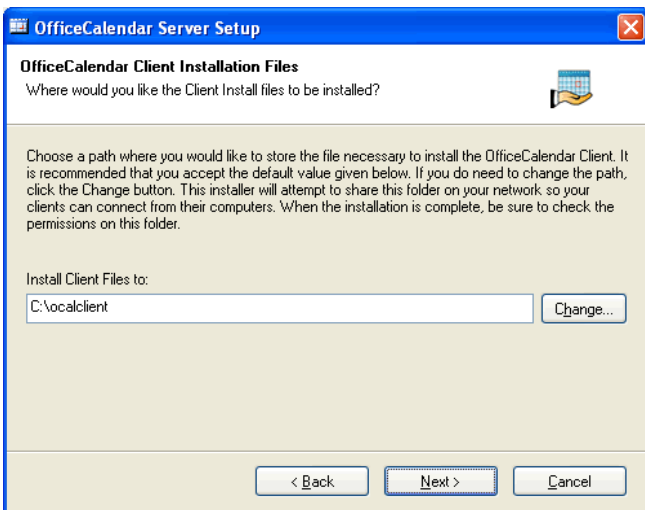
- d. When the .NET Framework installation is complete you'll see the dialog box below; click **OK** to return to the OfficeCalendar Server installation.



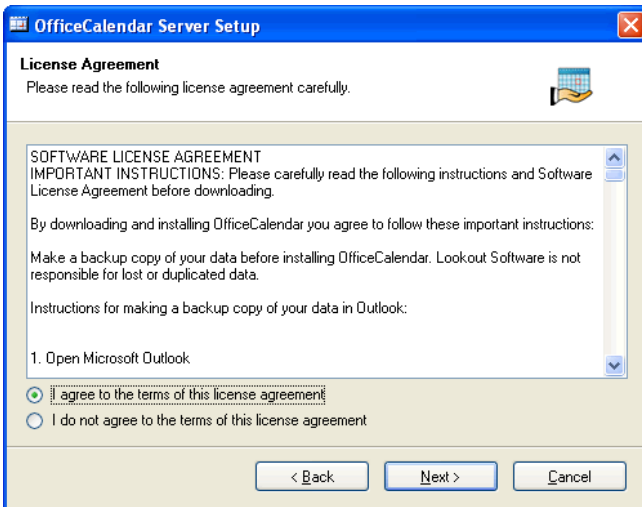
5. Select an installation folder for the OfficeCalendar Server (for ease of support we recommend that you choose the default location of **C:\Program Files\OfficeCalendar Server**); and click **Next**.



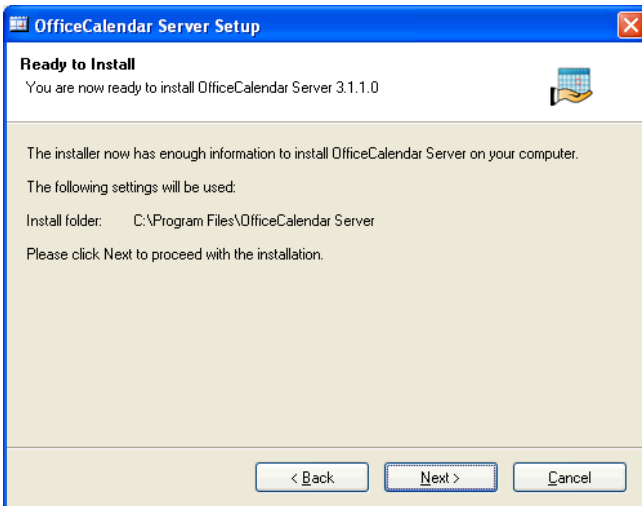
6. Select an installation folder for the OfficeCalendar Client installation files (for ease of support we recommend that you choose the default location of **C:\vocalclient**), and click **Next**.



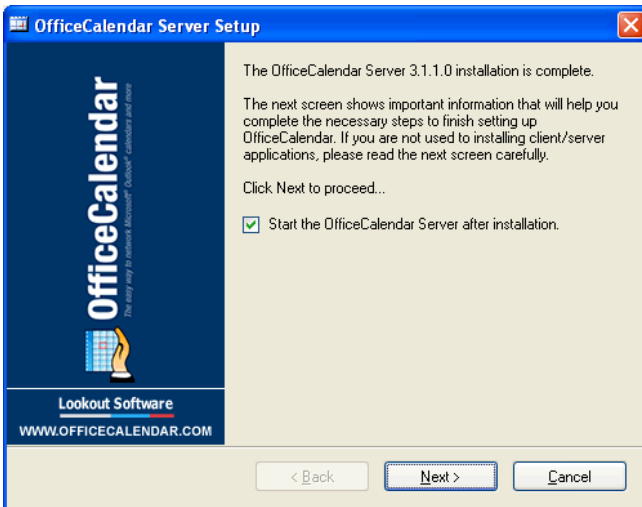
7. Please read the OfficeCalendar license agreement; click the ***I agree to the terms of this license agreement*** radio button; and click **Next**.



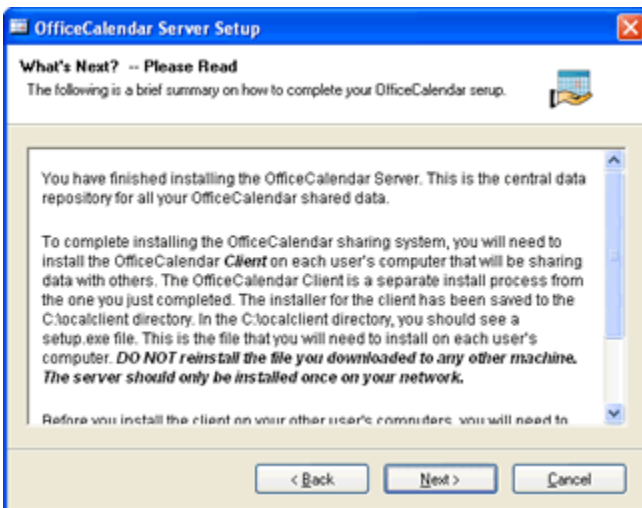
8. From the **Ready to Install** dialog box; click **Next**.



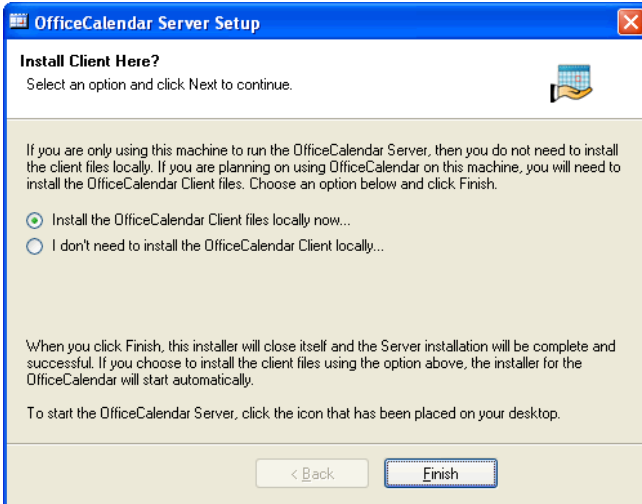
9. Once the OfficeCalendar Server setup has successfully installed; click **Next**.



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**.



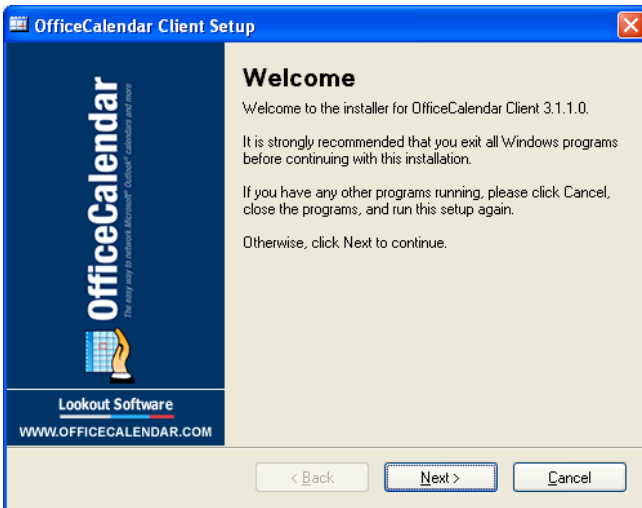
11. From the **Install Client Here?** screen, choose whether or not you want to install the OfficeCalendar Client software on this computer, and click **Finish**. Proceed to *step 12* if you chose to install the OfficeCalendar Client software on this computer. Proceed to the topic ***Adding User Accounts to the OfficeCalendar Server*** on *page 14* if you chose not to install the OfficeCalendar Client software on this computer. See below if further explanation of this screen if needed.



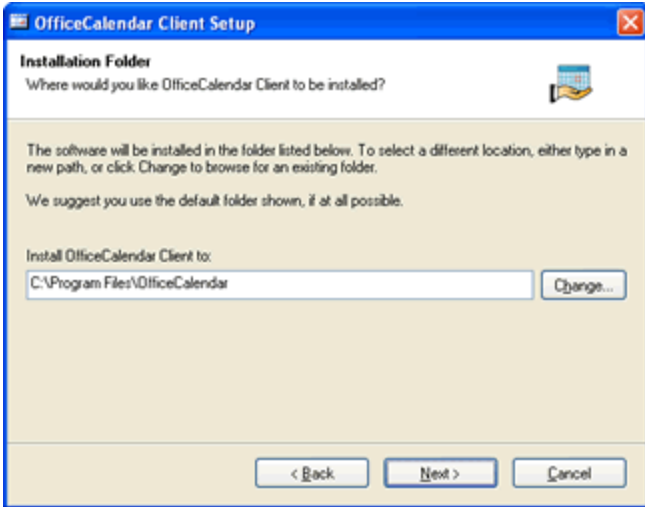
Install Client Here?

You do not need to install the OfficeCalendar 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.**

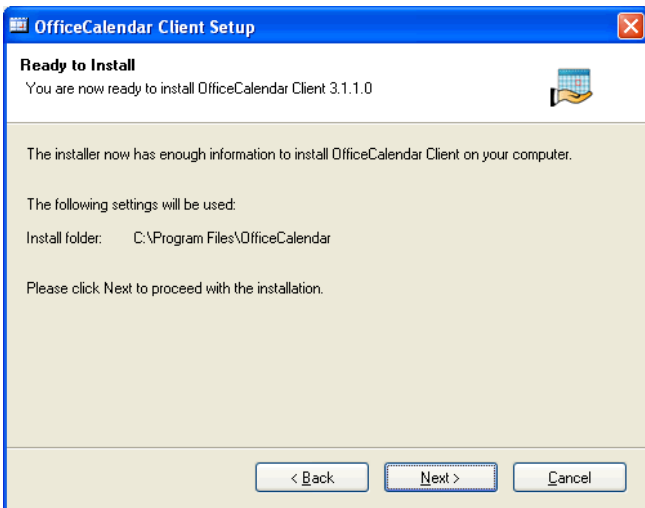
12. From the OfficeCalendar Client Setup **Welcome** screen, click **Next**.



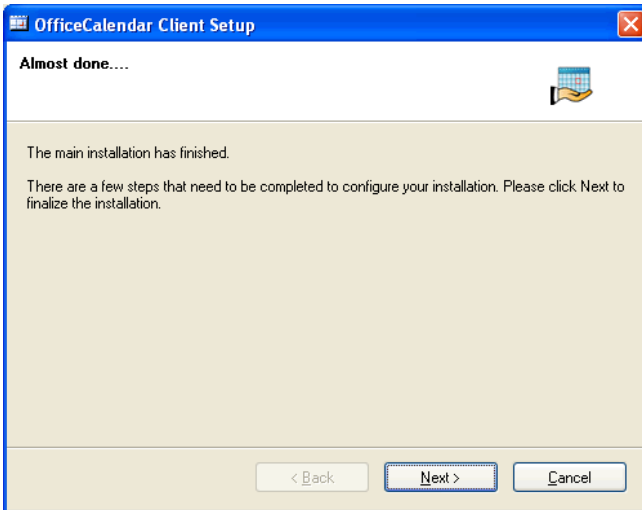
13. From the OfficeCalendar Client Setup **Installation Folder** screen, choose a folder to install the OfficeCalendar Client software to, and click **Next**. *We suggest you use the default folder shown for ease of support.*



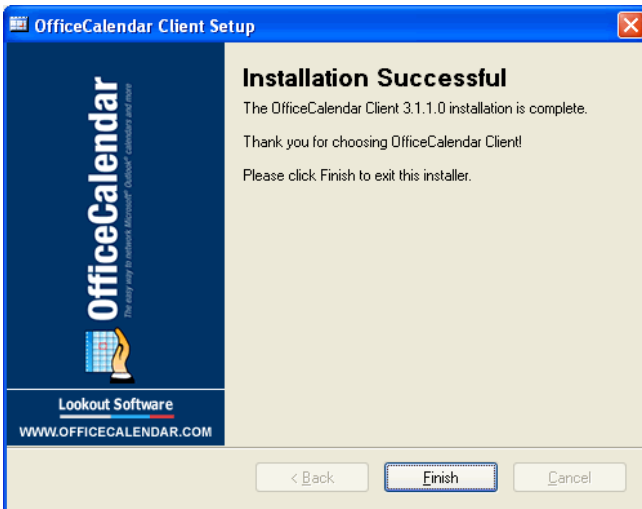
14. From the OfficeCalendar Client Setup **Ready to Install** screen, click **Next**.



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.



Quick Tip

If you get the message below after trying to start the OfficeCalendar Server then your OfficeCalendar Server has already been started.

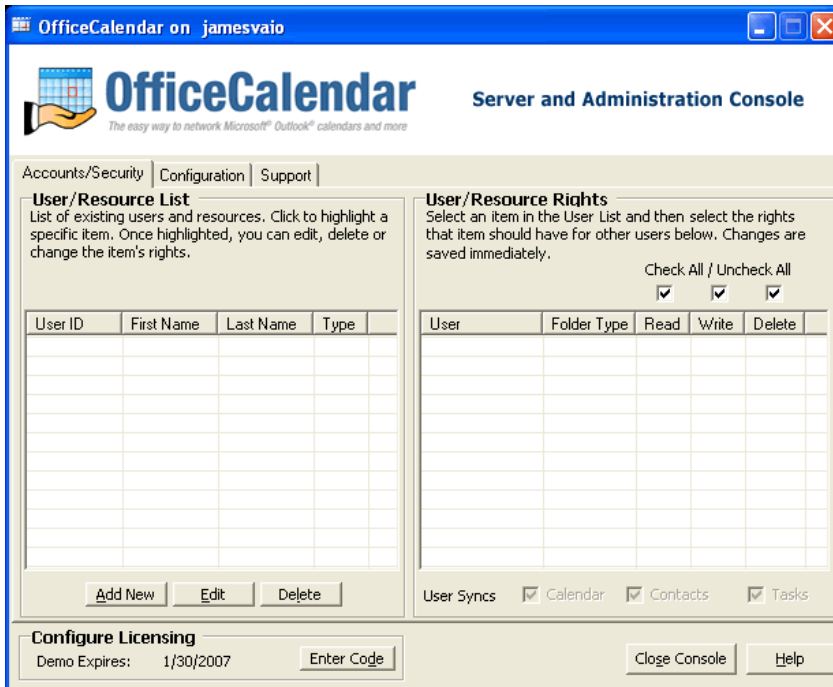
OfficeCalendar ✕

 OfficeCalendar Server is already running.

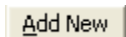
To open the OfficeCalendar Admin Console once the OfficeCalendar Server has been started simply right-click on the OfficeCalendar Server icon (shown below) in your Windows task tray, and select Show Admin Console.

 OfficeCalendar➔3:53 PM

2. The **OfficeCalendar Server and Administration Console** screen will appear.

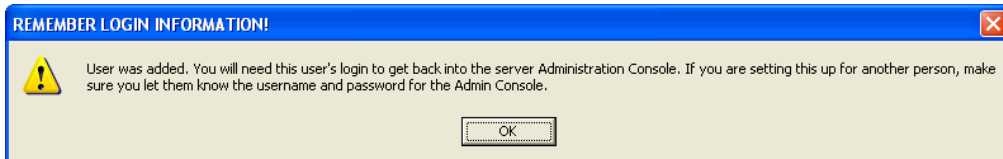


- From the **OfficeCalendar Server and Administration Console** click the **Add New** button.



- Enter a **Username**, **Password**, **First name**, **Last name**, and **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. Then 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 at a later time you will need to remember this username and password – if you are setting up an 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 user accounts, user security rights, etc) need to be assigned as an administrator in OfficeCalendar. However, we do recommend that you have at least two (2) administrators defined in your OfficeCalendar database.



6. Repeat *steps 3 and 4* until you have finished adding all users.

Quick Tip

Check the **This user is an 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.



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.



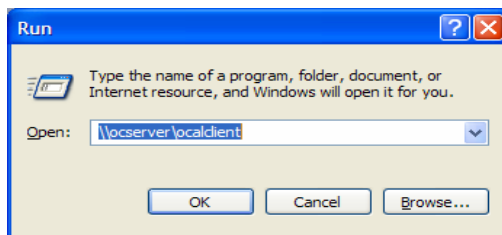
Quick Tip

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 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?

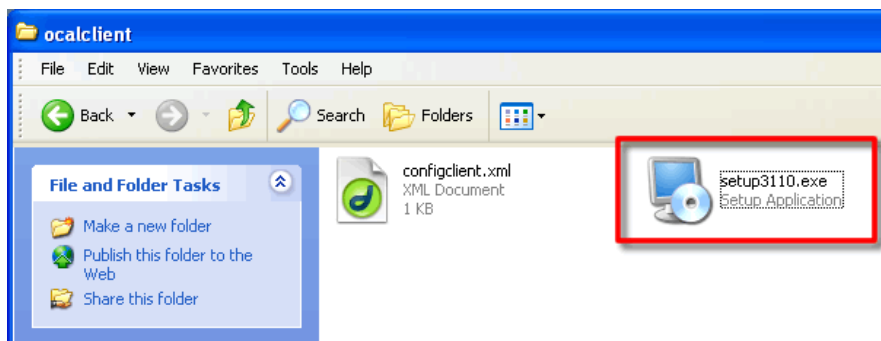
If you do not know the name of the computer where your OfficeCalendar Server is running simply open the OfficeCalendar Server program on that computer. Open the OfficeCalendar Server program by right-clicking on the OfficeCalendar Server icon (shown below) in the task tray and selecting **Show Admin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



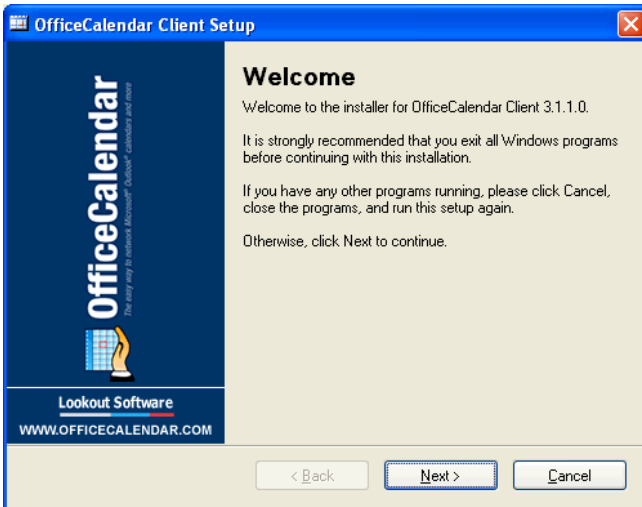
The OfficeCalendar Server's computer name is displayed at the top of the OfficeCalendar Server and Administration Console screen (highlighted below).



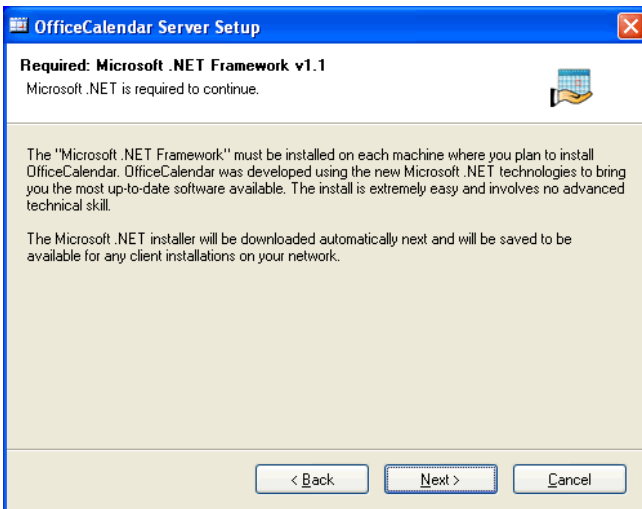
2. Double-click on the **setup3110.exe** icon (shown below).



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



4. If you do not 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*.

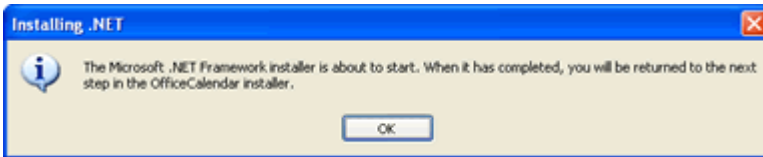


To Install the Microsoft .NET Framework:

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

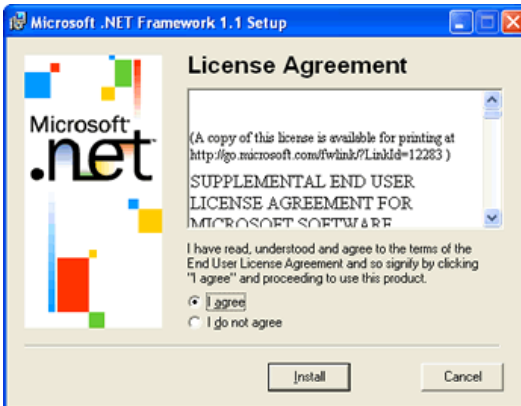
Please wait while the .NET Framework is downloaded (Note: this may take several minutes)...

- b. Once the .NET Framework download has completed you will see the screen below; click **OK**. Click **Yes** to start the .NET Framework installation.

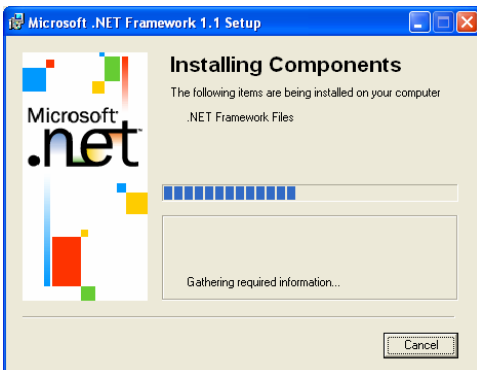


Please wait while the .NET Framework files are extracted for installation...

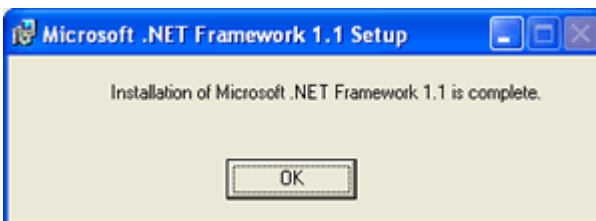
- c. Review the license agreement for the Microsoft .NET Framework, then click the **I agree** radio button; and click the **Install** button to proceed.



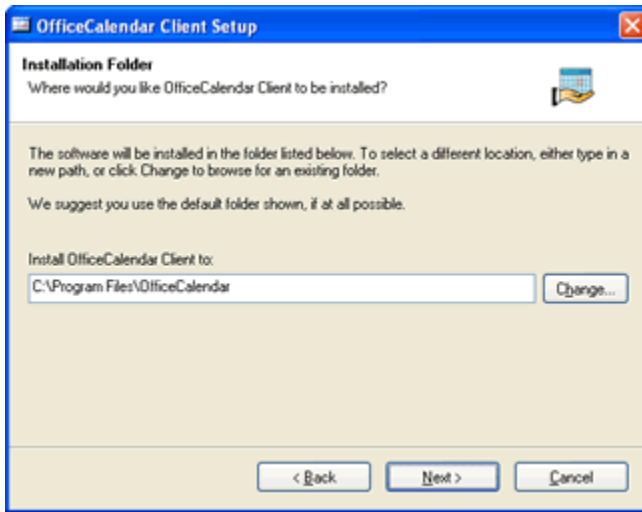
Please wait while the .NET framework installs...



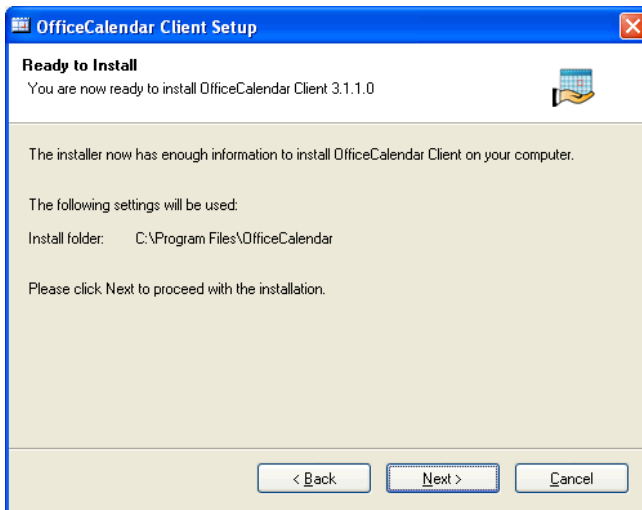
- d. When the .NET Framework installation is complete you'll see the dialog box below; click **OK** to return to the OfficeCalendar Client installation process.



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**.

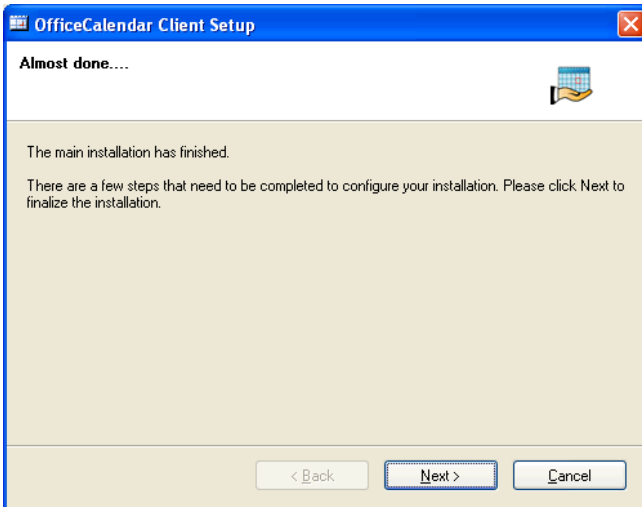


6. From the **Ready to Install** screen, click **Next**.

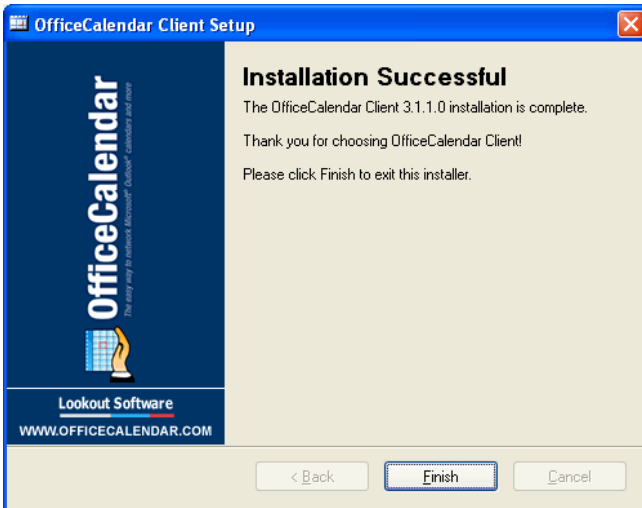


Please wait while the OfficeCalendar Client installs...

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

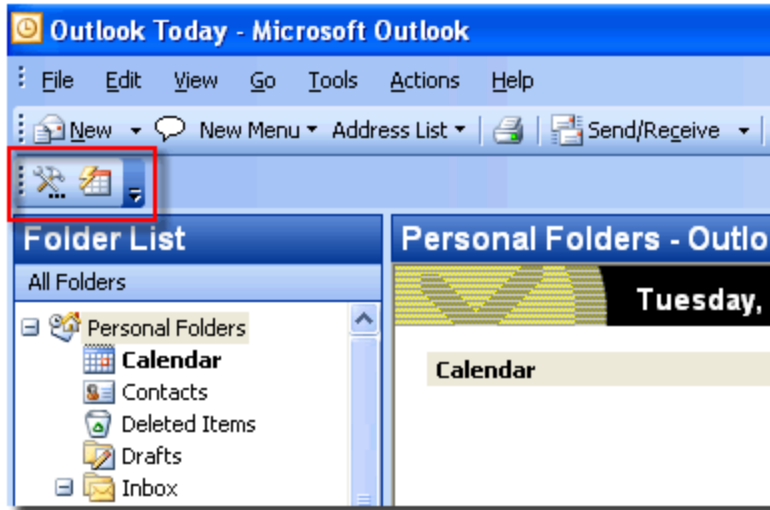


8. Click **Finish** when the OfficeCalendar Client installation is complete.



9. Start Microsoft Outlook on your computer.

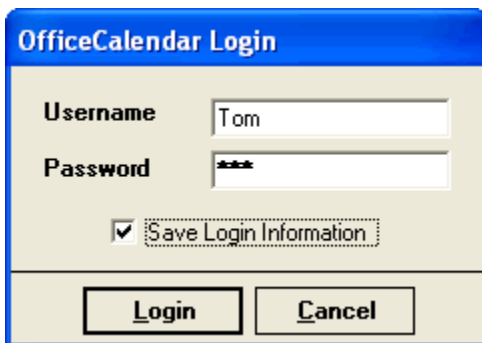
The OfficeCalendar Client added two icons to your Microsoft Outlook toolbar once installed (shown in the illustration below).




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.)

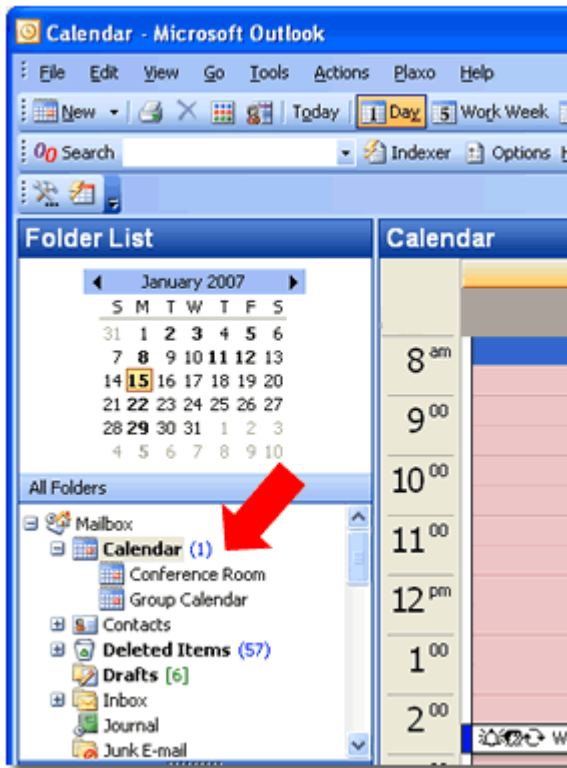


You'll notice that the synchronization icon will change states to  while your Outlook is synchronizing with the OfficeCalendar Server. Once the synchronization is complete it will change back to its original state.

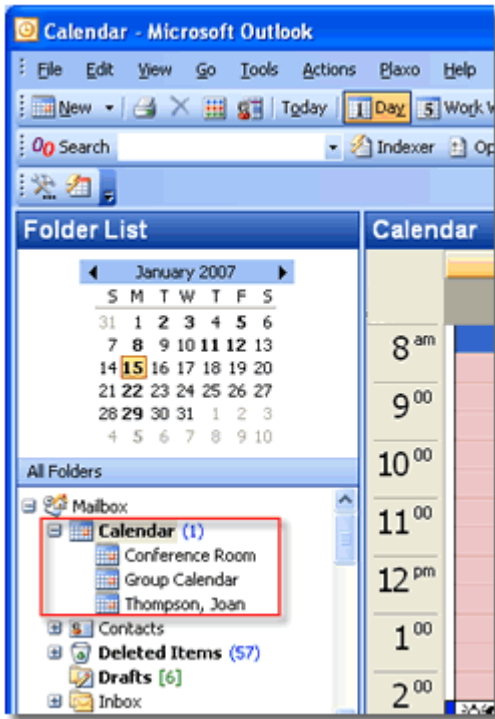
Once your first synchronization is complete you'll notice that new folders have been created under your root (main) Calendar, Contacts, and/or Tasks folders. A new folder will be created for everyone that has previously performed his or her first synchronization of OfficeCalendar. Also, OfficeCalendar creates a default

Group Calendar folder, which will appear under your Calendar folder (shown below).

If you are the first person to synchronize with the OfficeCalendar Server you will only see the group calendar and **Resource** user folder(s) that you have rights to view under your root **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.



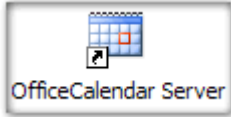
Administering OfficeCalendar

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**.

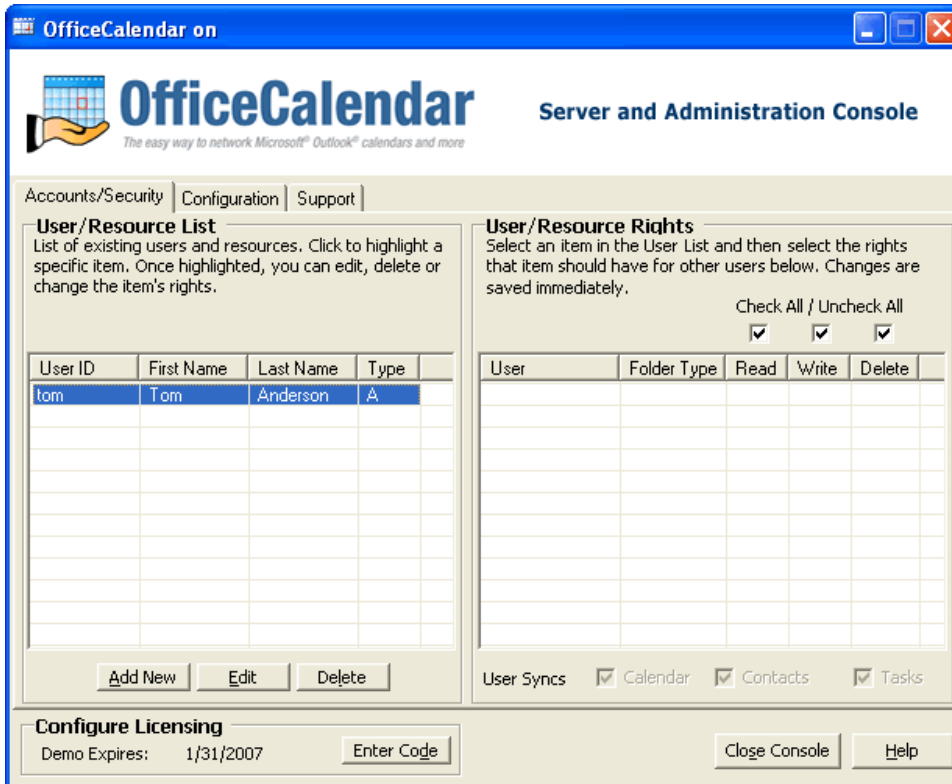
From the OfficeCalendar Server and Administration Console you can:

- Add, edit, and delete user accounts and shared resource folders.
- Create and add users to customized user groups.
- Create and add users to one or more group calendars with **In Group/View Group** access.
- Set a user's security access to other Outlook user and resource calendars, contacts and tasks information.
- Configure advanced network settings and other advanced options for larger groups.

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**.



Showing or Hiding Advanced Features within the Admin Console

OfficeCalendar offers several advanced features that most customers do not require. By default, these features do not show within the OfficeCalendar Admin Console. This keeps the OfficeCalendar Admin Console streamlined for faster and easier administration. OfficeCalendar's "Advanced" features include:

- User Group creation and administration
- Customer Group Calendar creation and administration
- Configuration settings for OfficeCalendar's Outlook Free/Busy Server

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<http://www.officecalendar.com>

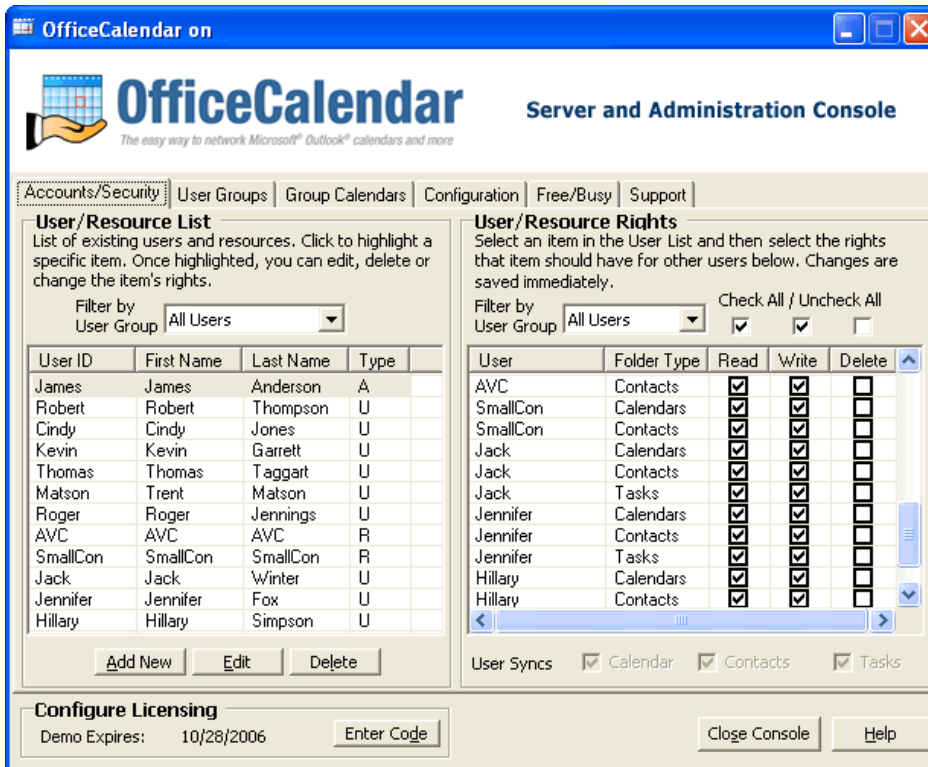
28

- User Group Filters

These features can easily be shown by right-clicking on the OfficeCalendar Server icon in the Windows task tray, and selecting **Show Advanced Features**.



With the Advanced features shown, you'll notice three (3) additional tabs within the OfficeCalendar Admin Console's main dialog box: **User Groups**, **Group Calendars** and **Free/Busy**.



With the Advanced features shown, you'll also notice that the dialog box for adding or editing OfficeCalendar users includes additional options, which allows administrators to configure user accounts for the advanced User Group and Group Calendar features.

User Details

Username: Robert Password: *****

First name: Robert Last name: Thompson

Folder Name: Thompson, Robert

User Group: Service Technicians [New User Group]

Group	In Group	View Group	
Group Calendar	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	[New Group Calendar]
Engineers	<input type="checkbox"/>	<input type="checkbox"/>	
Service Techni...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Installers	<input type="checkbox"/>	<input type="checkbox"/>	

Create user as a resource. This user is an administrator.

Existing users can read write delete this user's records.

This user can read write delete existing user's records.

[Cancel] [Save and New] [Save and Close]

These “Advanced” features are explained and demonstrated in more depth throughout the OfficeCalendar User’s Guide. However, if you are like most OfficeCalendar customers and don’t require these advanced features, we highly recommend that you simply leave them turned off. This will keep your OfficeCalendar installation streamlined for faster setup and data entry.

Adding New OfficeCalendar User Accounts

1. Open the **OfficeCalendar Server and Administration Console**.
2. Click the **Add New** button.



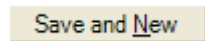
3. Enter the **Username**, **First name**, **Last name**, and **Password** for the user you wish to add to OfficeCalendar; type in a unique name to display the folder within other user’s Outlook folder list in the **Folder Name** field (optional). You can also create and add users to user groups (reference the topic **“Managing OfficeCalendar User Groups”** on page 32 for more details), as well as group calendars with **In Group** and/or **View Group** access (reference the topic **“Managing Group Calendars for Group Scheduling”** on page 40 for more details). Then 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 assigned as an OfficeCalendar Administrator.

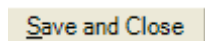
4. Save the user account information you've added:

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



-Or-

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



Editing OfficeCalendar User Accounts

1. Open the **OfficeCalendar Server and Administration Console**.
2. Highlight the user account you want to edit in the **User/Resource 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 delete in the **User/Resource 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 User "X's" subfolders are removed from their Microsoft Outlook folder list. 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.

Managing OfficeCalendar User Groups

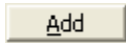
Overview

OfficeCalendar administrators have the option in the OfficeCalendar Server and Administration Console to create and add users to **user groups**. User groups are usually created to classify users with something in common (such as co-workers in a certain department, or a special committee), and are very useful if you have a larger number of users. Administrators can create as many user groups as necessary, but a user may only belong to one (1) user group within OfficeCalendar (not to be confused with group calendars where a person or resource can be in more than one group calendar).

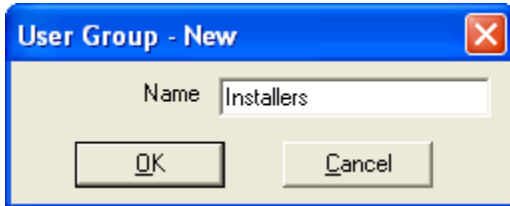
By default, OfficeCalendar creates the User Group, "*General*", which can be deleted.

Adding OfficeCalendar User Groups

1. Open the **OfficeCalendar Server and Administration Console**.
2. Click on the **User Groups** tab, and click the **Add** button.

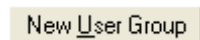


3. Enter the **Name** for the new user group, and then click **OK**.



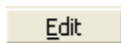
-Or-

You can also add a new user group when you are adding or editing an OfficeCalendar user account. Simply click on **New User Group** in the **User Details** dialog box. Enter the **Name** for the new user group, and click **OK**.



Editing OfficeCalendar User Groups

1. Open the **OfficeCalendar Server and Administration Console**.
2. Click on the **User Groups** tab. Under **Groups**, highlight the user group you want to edit and click the **Edit** button.

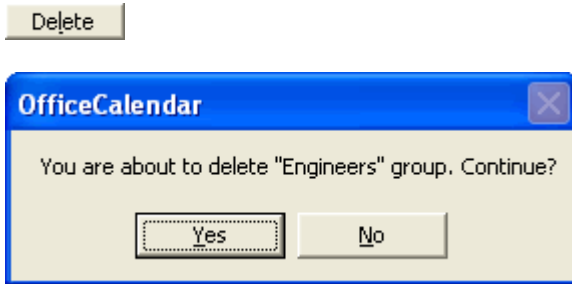


3. Enter the new **Name** for the user group, and then click **OK**

Deleting OfficeCalendar User Groups

1. Open the **OfficeCalendar Server and Administration Console** and click on the **User Groups** tab.
2. In order to delete a user group, all users that are in the user group you want to delete must be moved to another user group. You can do this using the **Move to Group** function (refer to the next topic, *"Using the Move to Group Function"*).

3. After the user group is empty and no users are listed under the group, make sure the user group you want to delete is highlighted.
4. Click on the **Delete** button. A message will appear asking to confirm the action to delete the user group; select **Yes** if you are sure you want to delete the user group.

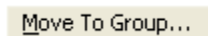


OfficeCalendar will not delete a user group if active users are still listed under the user group in question. Therefore, it is impossible to delete user accounts by deleting user groups.

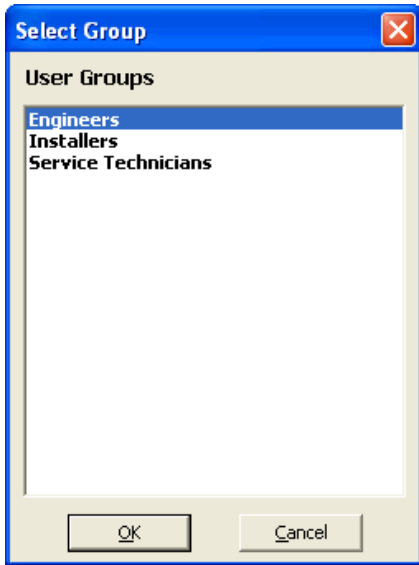
Using the Move to Group Function

To move one or more users from one user group to another:

1. Open the **OfficeCalendar Server and Administration Console** and click on the **User Groups** tab.
2. Highlight the user group with the user accounts you want to move. Then highlight the user account you want to move to another user group.
3. Click on the **Move to Group** button.

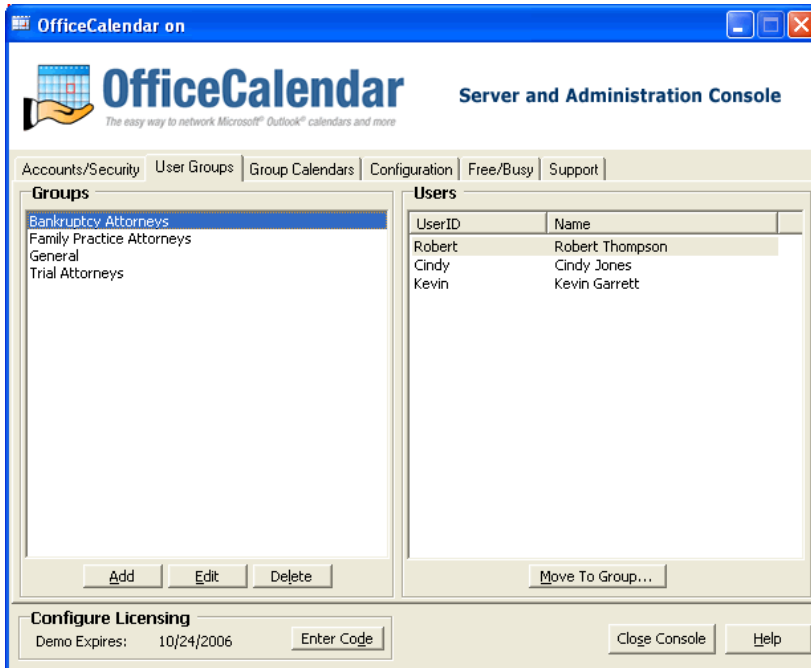


4. Select the new user group you want to add the user to, and then click **OK**.



Sample User Groups

User groups can be customized to fit your specific environment or needs. In this example, set up for an attorneys' office, we have created three different user groups and placed the appropriate users in each.



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, 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/Resource 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 a 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/Resource List
List of existing users and resources. Click to highlight a specific item. Once highlighted, you can edit, delete or change the item's rights.

Filter by User Group: All Users

User ID	First Name	Last Name	Type
William	William	Brown	A
Cindy	Cindy	Anderson	U
Jamie	Jamie	Thompson	U
Andy	Andy	Jackson	U
Jenna	Jenna	Black	U

User/Resource Rights
Select an item in the User List and then select the rights that item should have for other users below. Changes are saved immediately.

Filter by User Group: All Users Check All / Uncheck All:

User	Folder Type	Read	Write	Delete
Cindy	Calendars	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cindy	Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cindy	Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jamie	Calendars	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Jamie	Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jamie	Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Andy	Calendars	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Andy	Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Andy	Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jenna	Calendars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jenna	Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jenna	Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Quick Tip

Use the **Filter by User Group** and **Check All/Uncheck All** features for faster administration with larger groups. These features can be found in the OfficeCalendar Server and Administration Console under the *Accounts/Security* and *Group Calendars* tabs.

For example, if users are categorized into several user groups, you can **Filter by User Group** to pull up a particular user group and assign security rights that may be specific to users in that user group.

The **Check All/Uncheck All** feature allows administrators to assign the same security rights to multiple users with one click. If the box below **Check All/Uncheck All** is selected corresponding to either *Read*, *Write* or *Delete*, the entire list of users in a user group will be given that specific security right. If the box is unchecked, that means that the security right(s) will not apply to the list of users. This feature also applies to the *In Group* and *View Group* security rights.

*Note: Security rights can still be applied to users individually, as shown in the screens below.

User/Resource Rights
Select an item in the User List and then select the rights that item should have for other users below. Changes are saved immediately.

Filter by User Group: Check All / Uncheck All:

User	Folder Type	Read	Write	Delete
Cindy	Calendars	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cindy	Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cindy	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jamie	Calendars	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Jamie	Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jamie	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Andy	Calendars	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Andy	Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Andy	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jenna	Calendars	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jenna	Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jenna	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Accounts/Security | User Groups | Group Calendars | Configuration | Free/Busy | Support

Group Calendars

- Engineers
- Group Calendar
- Installers
- Service Technicians

Users

Check All / Uncheck All: Filter by User Group:

In Group	View Group	User ID	Name	Type
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jamie	Jamie Thomps...	U
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Andy	Andy Jackson	U
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jenna	Jenna Black	U

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

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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:

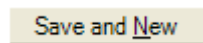
1. Open the **OfficeCalendar Server and Administration Console**.
2. Click the **Add New** button.



3. Enter a **Username**, **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**. You can also create and add resource folder accounts to user groups (reference the topic *"Managing OfficeCalendar User Groups"* on page 32 for more details), as well as group calendars with **In Group** and/or **View Group** access (reference the topic *"Managing Group Calendars for Group Scheduling"* on page 40 for more details). Next, assign the basic security rights for the resource account you are adding by clicking on the appropriate radio buttons. However, because a resource folder account is not physical user, it will not have security rights to other users; physical users will only have security rights to the resource folder account.

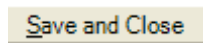
4. Save the resource folder account information you've added:

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



-Or-

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



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.

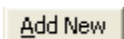
Managing Group Calendars for Group Scheduling

Overview

OfficeCalendar administrators can create and name multiple group calendar folders, select the users/resources that are included in these group calendars, and assign who the group calendars will be visible to. Users with the appropriate security rights can add, edit and delete appointment items directly from group calendar folders. Refer to the topic *“Group Scheduling with OfficeCalendar’s Outlook Group Calendars”* (page 62) for more information about OfficeCalendar’s Outlook group calendars.

Adding Group Calendars

1. Open the **OfficeCalendar Server and Administration Console**.
2. Click on the **Group Calendars** tab, and click the **Add New** button.

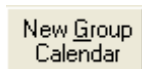


3. Enter the **Name** for the new group calendar, and then click **OK**.



-Or-

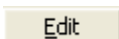
You can also add a new group calendar folder when you are adding or editing an OfficeCalendar user account. Simply click on **New Group Calendar** in the **User Details** dialog box. Enter the **Name** for the new group calendar folder, and click **OK**.



****NOTE:** For technical reasons, you can not create a group calendar with the same name as an existing User or Resource defined within the OfficeCalendar User/Resource List.

Editing Group Calendars

1. Open the **OfficeCalendar Server and Administration Console**.
2. Click on the **Group Calendars** tab. Under **Group Calendars**, highlight the group calendar you want to edit and click the **Edit** button.



3. Enter the new **Name** for the group calendar folder, and click **OK**.

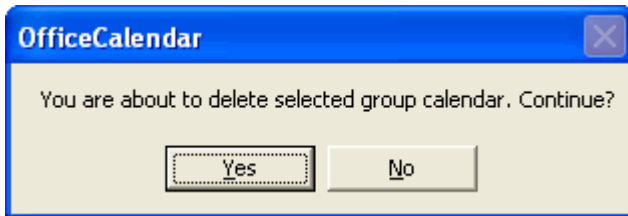
When users that can see the selected group calendar synchronize again after the group calendar is edited, the new group calendar name will replace the previous name.

Deleting Group Calendars

1. Open the **OfficeCalendar Server and Administration Console**.
2. Click on the **Group Calendars** tab. Under **Group Calendars**, highlight the group calendar you want to delete and click the **Delete** button.



3. A message will appear asking to confirm the action to delete the selected group calendar folder; select **Yes** if you are sure you want to delete the group calendar.

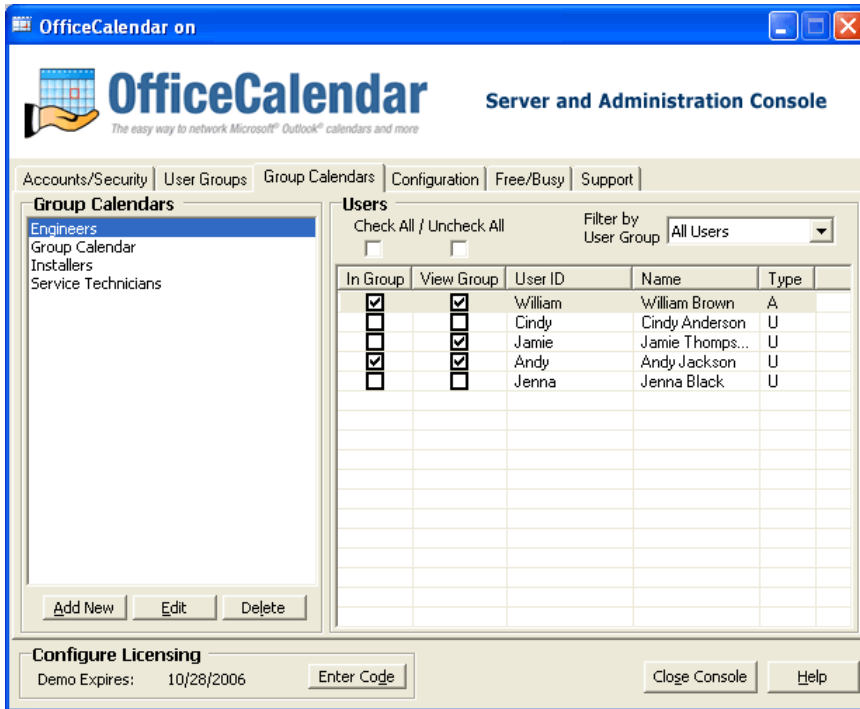


Use extreme caution when deleting a group calendar folder, as this action affects all users associated with the group calendar. However, if a group calendar folder is inadvertently deleted, it may be recreated by adding it again.

Using In Group/View Group Calendar Functions

After a group calendar folder is created, OfficeCalendar administrators can add users to and/or give them rights to view multiple group calendars with the **In Group** and **View Group** functions.

1. Open the **OfficeCalendar Server and Administration Console**.
2. Click on the **Group Calendars** tab. Under **Group Calendars**, highlight the group calendar you want to add users to or give viewing access to.
3. Under **Users**, click on the appropriate **In Group** and/or **View Group** checkboxes next to the user(s) listed.



In the above example, both William's and Andy's appointments will appear in the Group Calendar "Engineers" as both have the **In Group** option selected. Also, both William and Andy will see the Group Calendar "Engineers" from within the Outlook folder list as both have the **View Group** option selected.

Jamie's appointments will not appear in the Group Calendar "Engineers" as the **In Group** option is not selected for him; but he will be able to see the Group Calendar "Engineers" as the **View Group** option is selected for him. Thus, unlike William and Andy, Jamie's appointments will not appear in the Group Calendar "Engineers". However, he will be able to see the Group Calendar. Jamie's ability to interact with the Group Calendar is determined by the rights for which he has to William's and Andy's appointments in the **Accounts/Security** tab.

Cindy's and Jenna's appointments will not appear in the "Engineers" Group Calendar, nor will they be able to see the "Engineers" Group Calendar as they have no **In Group** or **View Group** options selected.

In Group/View Group Calendar Functions Scenarios

User is In Group Calendar and can View Group Calendar

This is the most frequently used setting. A good example is a law firm, in which case the attorneys not only need to be included in the group calendar, but they also need to view the group calendar to see who is available for court appearances and other scheduling matters.

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User is NOT In Group Calendar but can View Group Calendar

This calendar setting is useful, for example, if a secretary whose personal appointments do not need to be on a calendar for scheduling, but she needs to see everyone else's appointments in order to schedule appropriately.

User is In Group Calendar, but CANNOT View Group Calendar

This would be appropriate, for example, if an exterminator's office needs all field agents' appointments on a calendar so their secretary can schedule appropriately. However, the field agents do not necessarily need to see the group calendar for all other agents.

User is NOT In Group Calendar, and CANNOT View Group Calendar

This setting would apply to a user who might be included in other group calendars, but does not have any reason to be included or see a certain group calendar that is meant for other users.

Setting a User's Security Rights in Group Calendars

Security rights that OfficeCalendar administrators assign to users also apply to group calendar folders. For example, if User A and User B are both able to **View Group Calendar X** and are **In Group Calendar X**, User A will not be able to view User B's appointments if User A does not have the right to view User B's appointments from with the **Accounts/Settings** tab.

Configuring OfficeCalendar to Work Over a Specified Network Port

By default OfficeCalendar communicates across networks on port number 1802. Network administrators may 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 an 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 ALL OfficeCalendar Clients from within Microsoft Outlook.

To change the port number settings on the OfficeCalendar Server

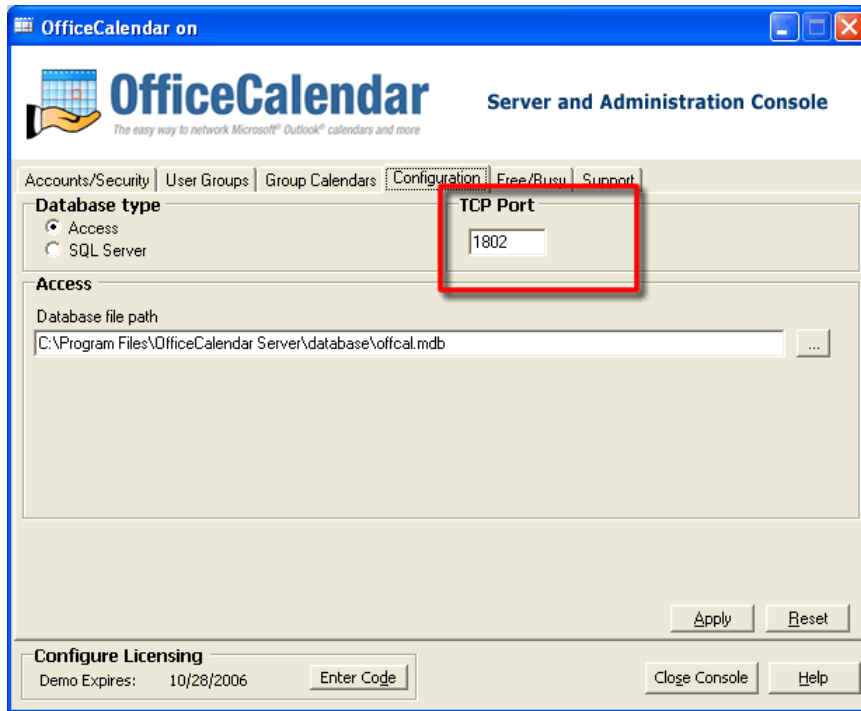
1. Open the **OfficeCalendar Server and Administration Console**.
2. Click the **Configuration** tab.

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- Under **TCP Port** on the **Configuration** tab, change the **TCP Port Number**, and click **Apply**.

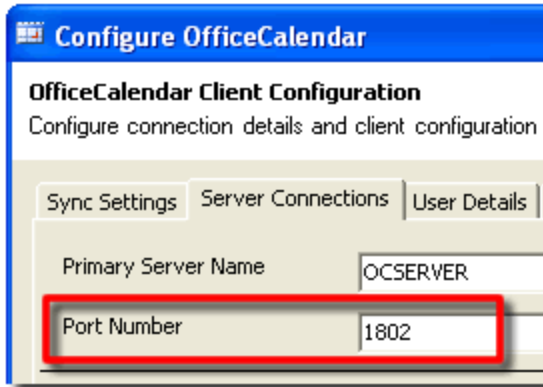


To change the port number setting on the OfficeCalendar Client to correspond with the OfficeCalendar Server

- Open Microsoft Outlook.
- Click on the **Configure OfficeCalendar** icon.



- 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.



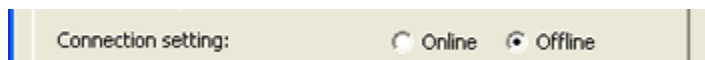
The OfficeCalendar Client Configuration screen has several tabs that enable users to easily navigate to the appropriate area of configuration. The first tab-screen that appears upon opening the OfficeCalendar Client Configuration screen is titled **Sync Settings**. You'll also see the tabs **Server Connections**, **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 68) 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.

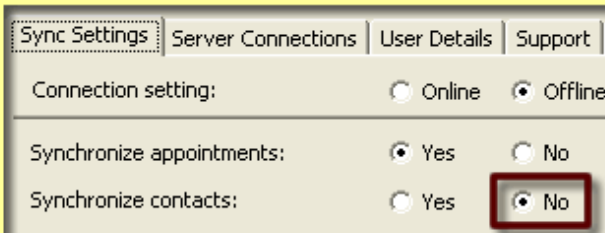


- **Synchronize contacts** – this allows the user to choose whether or not they want to synchronize their Microsoft Outlook contacts with the OfficeCalendar Server. This option exists for several reasons. First, it provides an additional level of security for the end user, ensuring that their Outlook 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.

A screenshot of a 'Sync Settings' window. It has four tabs: 'Sync Settings', 'Server Connections', 'User Details', and 'Support'. The 'Sync Settings' tab is active. It contains three rows of settings: 'Connection setting:' with 'Online' and 'Offline' radio buttons (Offline is selected); 'Synchronize appointments:' with 'Yes' and 'No' radio buttons (Yes is selected); and 'Synchronize contacts:' with 'Yes' and 'No' radio buttons (No is selected and highlighted with a red box).

- **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.



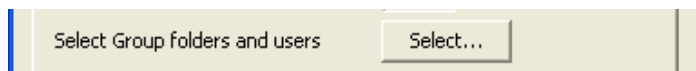
- **Automatically synchronize every** – this allows the user to set how often they wish to synchronize their Outlook data with the OfficeCalendar Server. The default setting for this field is 15 minutes. While we do not recommend that you set this field for less than 15 minutes, it can be set as low 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.



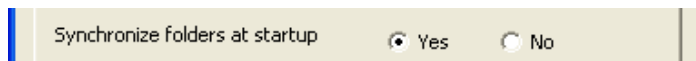
- **Select Group folders and users** – this allows users to choose which Outlook group calendars; and other user/resource calendar, contact and task folders in which they wish to synchronize.

This option to select which group calendar folders and which users to synchronize with exists for several reasons. First, a user may not have a need to view a certain group calendars, resource calendars and/or user calendars, even though they were given the ability to do so in the OfficeCalendar Server and Administration Console. Choosing not to synchronize with other users and/or one or more group calendars keeps the Microsoft Outlook Calendar folder list cleaner and thus easier to navigate. Second, it provides increased synchronization speed if OfficeCalendar does not have to update all available group calendars, user calendars, and resource calendars while synchronizing with Microsoft Outlook. However, if a user is working offline this option will not be available.



Refer to the topic *“Group Scheduling with OfficeCalendar’s Outlook Group Calendars”* (page 62) for more information about OfficeCalendar’s Outlook group calendars. Refer to the topic *“Selecting Group Calendars and User Folders”* (page 57) for more information about selecting which group calendars and users to synchronize.

- **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.



Reference the topic *“Working Offline”* (page 68) 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

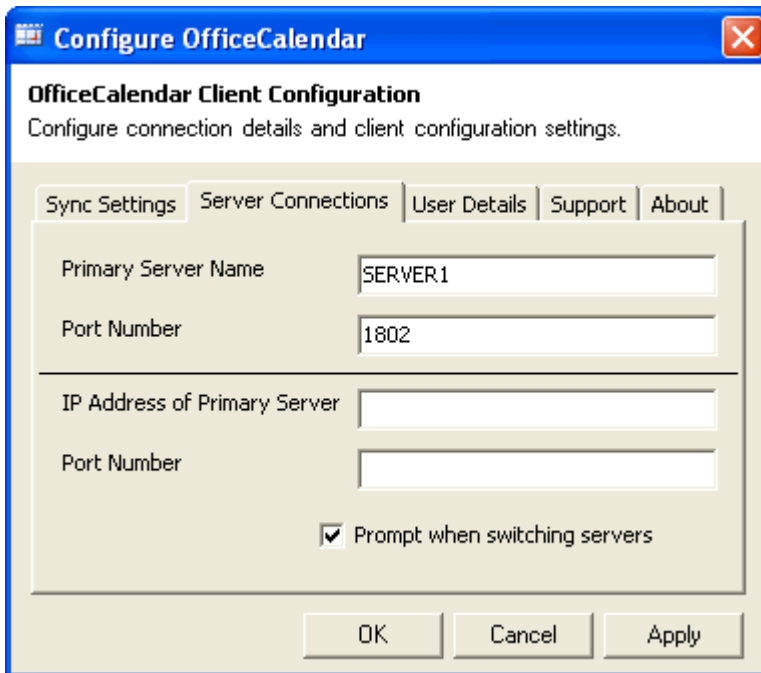
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<http://www.officecalendar.com>

configuration settings must be present: the **Server Name** and the **Port Number**. The **Server Name** represents the full computer name of the computer that is running the OfficeCalendar Server, and the **Port Number** 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 Server Name** and **IP Address of Primary Server** connection settings. Most OfficeCalendar Client users will only need the Primary Server Name info configured and, if the OfficeCalendar Client is installed from the shared **c:\localclient** folder, this info will be automatically configured. Thus, it is likely that a user will never need to do anything with these settings.

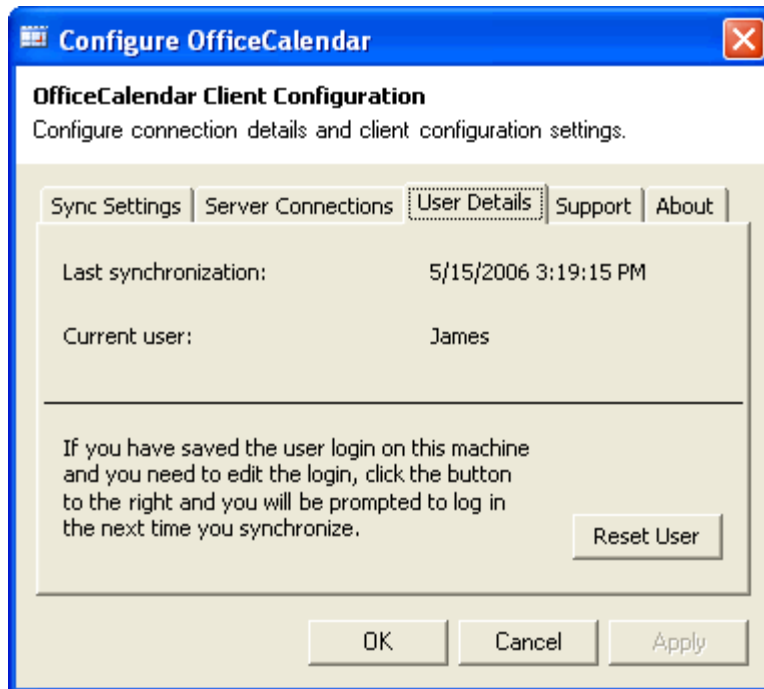


The **IP Address of Primary Server** info was designed to add another level of convenience for mobile notebook users that often work both in-office and out-of-office. While working in-office the user can connect via TCP using the full computer name of the OfficeCalendar Server, and while working out-of-office 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 Calendars over the Internet”*** on page 53 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.



The Support Tab

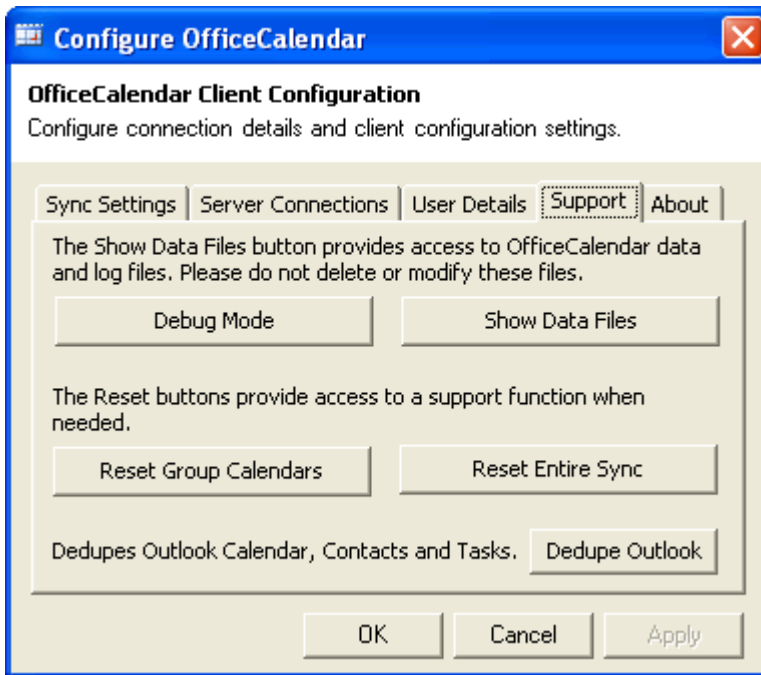
The **Support** tab, found in the **Configure OfficeCalendar** dialog box, contains five buttons: **Debug Mode**, **Show Data Files**, **Reset Group Calendars**, **Reset Entire Sync**, and **Dedupe Outlook**.

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

The **Show Data 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.

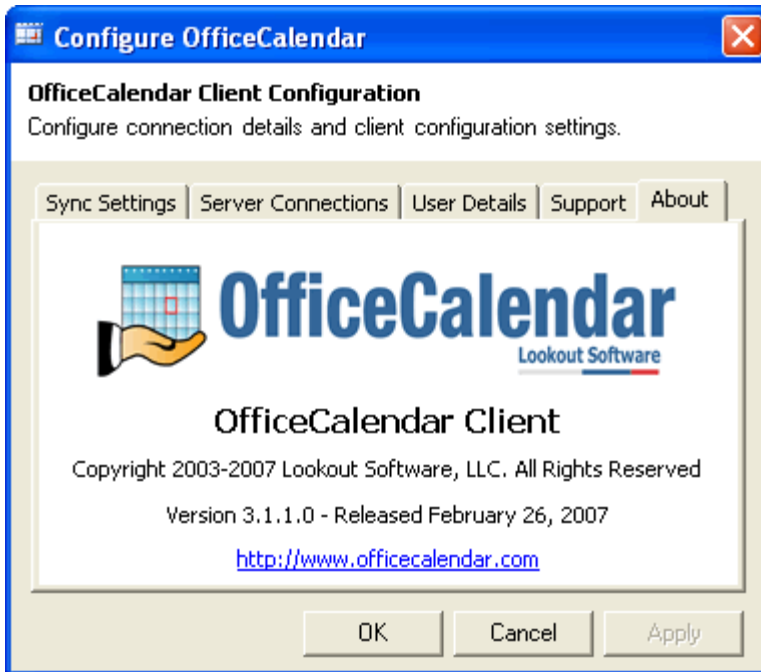
The **Reset Group Calendars** and **Reset Entire Sync** buttons provide access to a support function when needed. This routine should only be run under the direction of an OfficeCalendar staff member.

The **Dedupe Outlook** 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 .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. If you are interested in configuring TZO to enable OfficeCalendar synchronization over the Internet, refer to the OfficeCalendar Knowledge Base Article "Synchronizing Outlook Calendars over the Internet with OfficeCalendar," available online at <http://officecalendar.crmdesk.com/faq.aspx>.

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

4. Click on the **Configure OfficeCalendar** icon from within Microsoft Outlook.

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<http://www.officecalendar.com>

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5. From the **Configure OfficeCalendar** dialog box, click on the **Server Connections** tab.
6. Type in the IP address (or dynamic DNS name) of your OfficeCalendar Server in the **IP Address of Primary Server** field (refer to the **Server Connections** tab on *page 49* to determine the appropriate Server Name to use).
7. Click **Apply**, and then click **OK** to close the **Configure OfficeCalendar** dialog box.

The screenshot shows the 'Configure OfficeCalendar' dialog box with the 'Server Connections' tab selected. The dialog box has a blue title bar and a close button. The main area is titled 'OfficeCalendar Client Configuration' and contains the instruction 'Configure connection details and client configuration settings.' Below this are five tabs: 'Sync Settings', 'Server Connections', 'User Details', 'Support', and 'About'. The 'Server Connections' tab is active and contains the following fields:

- 'Primary Server Name' with the value 'SERVER1'
- 'Port Number' with the value '1802'
- 'IP Address of Primary Server' with the value '63.28.24.233'
- 'Port Number' with the value '1802'
- A checked checkbox labeled 'Prompt when switching servers'

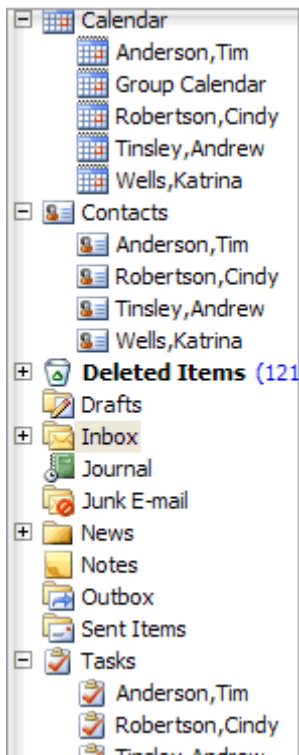
At the bottom of the dialog box are three buttons: 'OK', 'Cancel', and 'Apply'.

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.

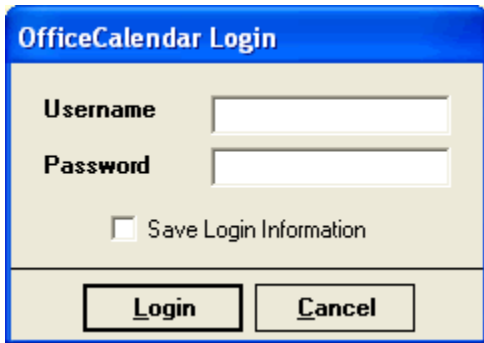


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<http://www.officecalendar.com>

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

The image shows a dialog box titled "OfficeCalendar Login". It has a blue title bar. Inside, there are two text input fields: "Username" and "Password". Below the "Password" field is a checkbox labeled "Save Login Information". At the bottom of the dialog box, there are two buttons: "Login" and "Cancel".

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

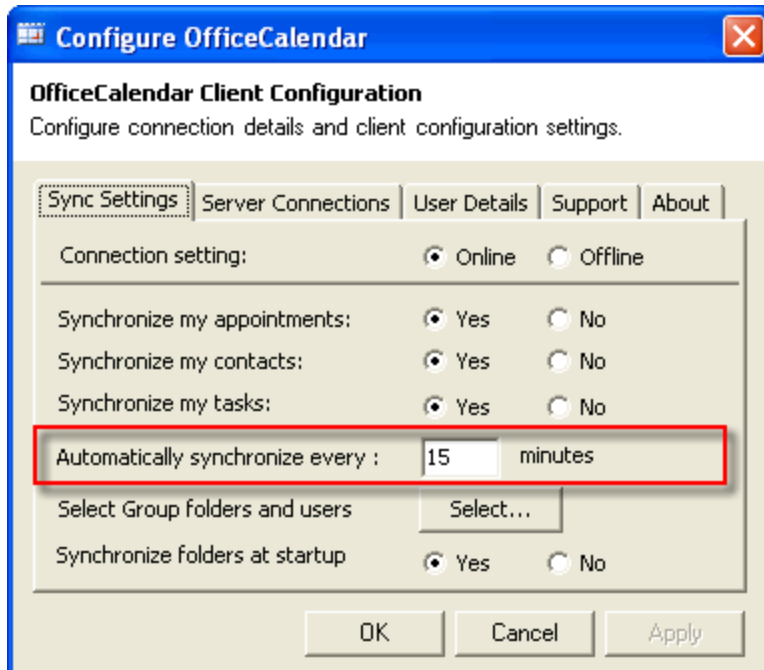
By default, your OfficeCalendar Outlook add-on Client will synchronize with the OfficeCalendar Server to send and receive updated Outlook shared calendar, contact, and task information every 15 minutes. OfficeCalendar allows you to change this setting more or less often if you wish.

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.

Selecting Group Calendars and User Folders

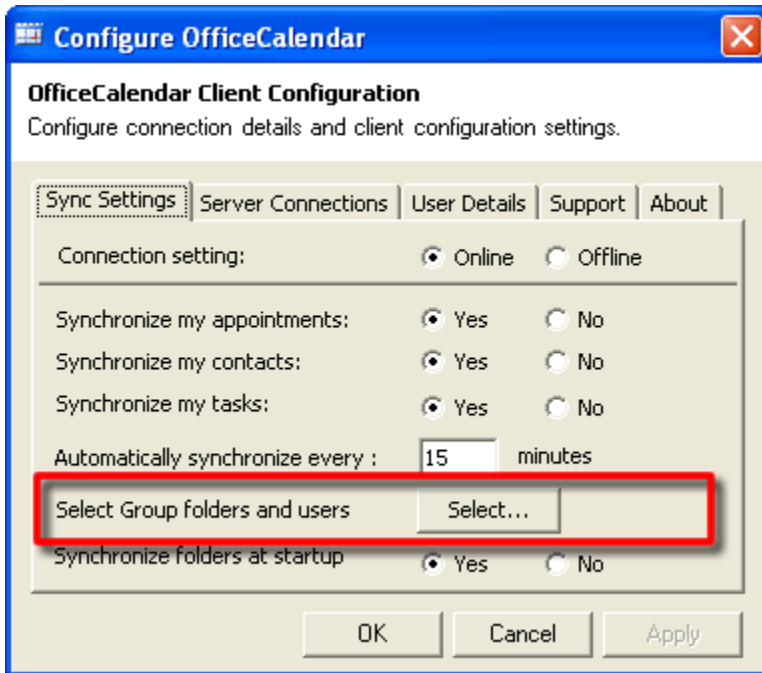
The ability to select which group calendars and other user folders you want to synchronize with allows you to control which folders are viewable in your Outlook copy. For example, if you have the rights to be included and can view Group Calendar X, but choose not to view Group Calendar X in your folder list, you may select to not synchronize with this Group Calendar and it will be removed from your folder list. Keep in mind, although you choose to not view Group Calendar X, your Outlook data will still be available to others viewing Group Calendar X.

To select which group calendars and user folders to synchronize in your Outlook folder list:

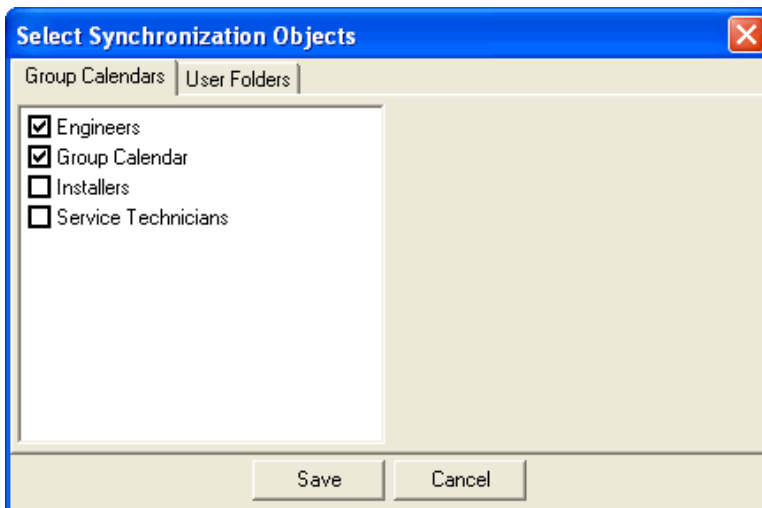
1. Click on the **Configure OfficeCalendar** icon.



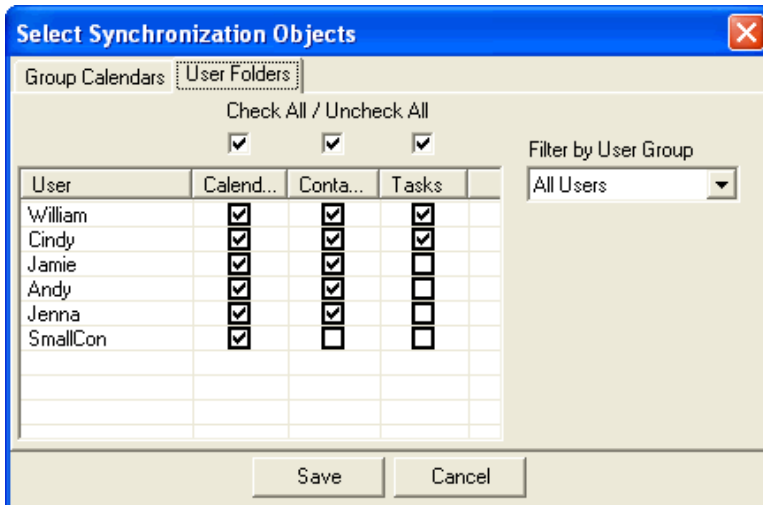
2. Click on the **Sync Settings** tab from the **Configure OfficeCalendar** dialog box. Click the **Select** button next to **Select Group folders and users**.



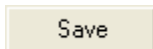
3. Select the **Group Calendars** tab. Check the boxes next to which group calendars you want to see next time you synchronize; de-select those you do not wish to see in your Outlook folder list.



4. Click the **User Folders** tab. Check the boxes corresponding to other users' Outlook data folders you want to see next time you synchronize; de-select the folders you do not wish to see within your Outlook folder list.



5. Click the **Save** button, then **OK** to exit the **Configure OfficeCalendar** dialog box.

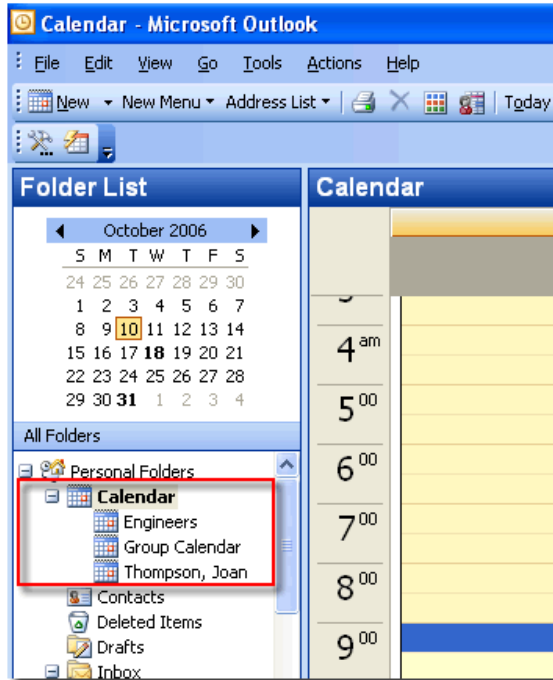


By selecting which group calendar folders and other users' Outlook folders you want to synchronize, you can keep your personal Outlook folder list organized and free of unnecessary information. This will not only improve navigation, but increases synchronization speed if OfficeCalendar does not have to update all available group calendar folders and other user folders while synchronizing with Microsoft Outlook.

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.

The screenshot shows the 'Appointment' dialog box in Microsoft Outlook. The title bar reads 'Quarterly Tax Review - Appointment'. The menu bar includes File, Edit, View, Insert, Format, Tools, Actions, and Help. The toolbar contains buttons for Save and Close, Recurrence..., and Invite Attendees. The 'Appointment' tab is active, and the 'Scheduling' sub-tab is selected. The 'Subject' field contains 'Quarterly Tax Review'. The 'Location' field is empty, and the 'Label' dropdown is set to 'Business'. The 'Start time' is 'Wed 10/11/2006' at '8:00 AM', and the 'End time' is 'Wed 10/11/2006' at '10:00 AM'. The 'All day event' checkbox is unchecked. The 'Reminder' is set to '15 minutes' and is checked. The 'Show time as' dropdown is set to 'Busy'. At the bottom right, the 'Private' checkbox is checked and highlighted with a red rectangle. Other buttons at the bottom include 'Contacts...', 'Categories...', and a 'Private' checkbox.

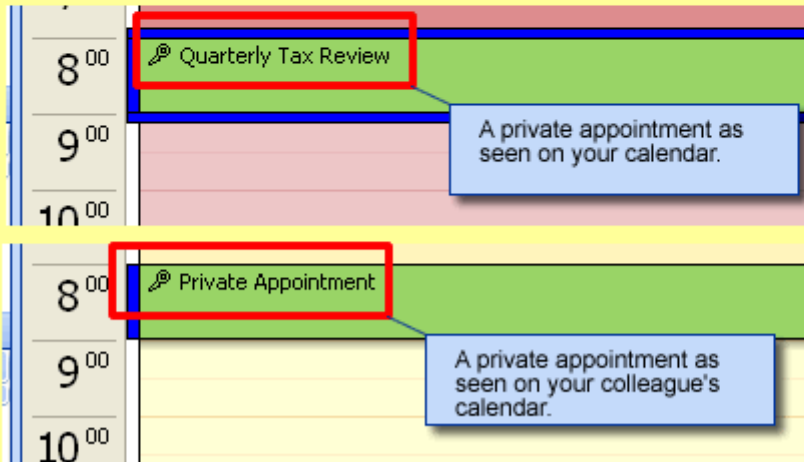
3. Click **Save and Close**.

Quick Tip

How can you tell if your appointment is marked Private?

If you have marked an appointment on your Outlook calendar as **Private** you will see a key icon beside the appointment's description when viewing your calendar in Microsoft Outlook.

The details of appointments you mark private are not viewable by anyone, even by those that have permission to share your Outlook calendar information. Those that do have permissions to see your appointments will only see the start time and end time of your private appointment, and will only see a subject of "Private Appointment" – all other details of the appointment will be hidden.

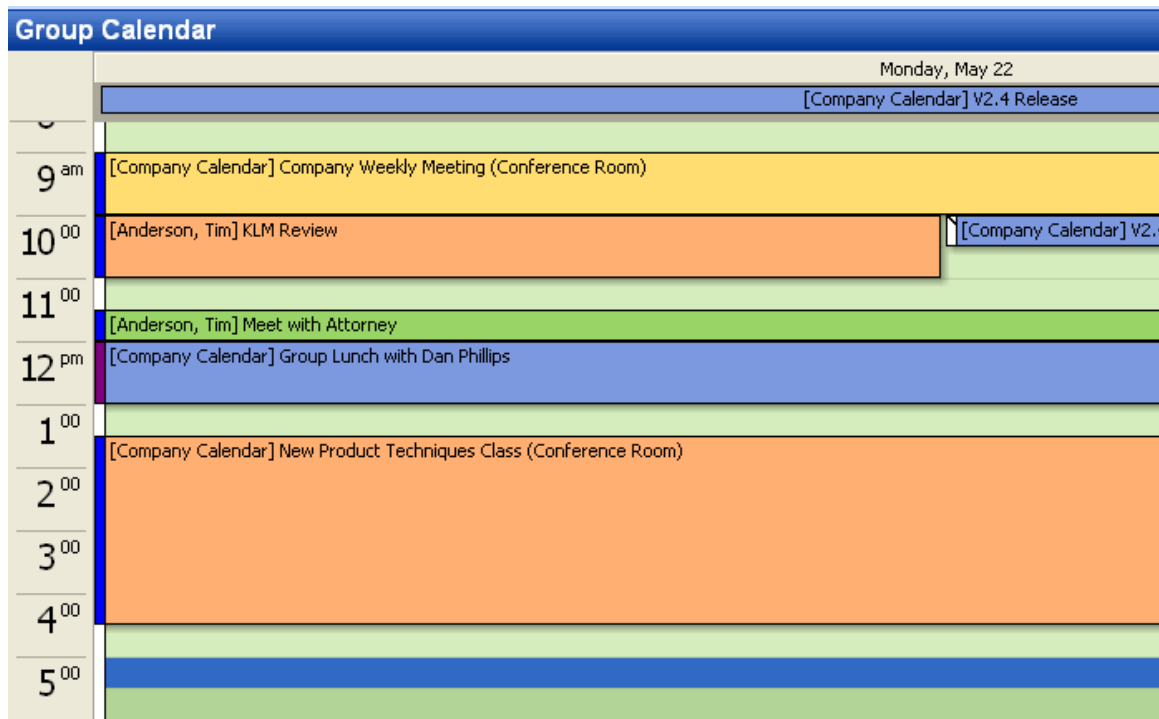


Group Scheduling with OfficeCalendar's Outlook Group Calendars

Once you have performed your first OfficeCalendar synchronization, you'll also notice that extra Calendar sub-folders were created in your Outlook software program called **Group Calendars**. Group calendars are created by your OfficeCalendar administrator, and security rights determine which group calendars will be available to you and what you can do within your associated group calendar folders. OfficeCalendar Outlook group calendars are customized calendar folders that aggregate multiple co-workers' 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 all OfficeCalendar Outlook group calendar folders your co-workers are included in upon the next OfficeCalendar synchronization. The same applies for you; if an appointment is added, edited or deleted to/from your Calendar folder or one of your group calendar folders, it will be updated

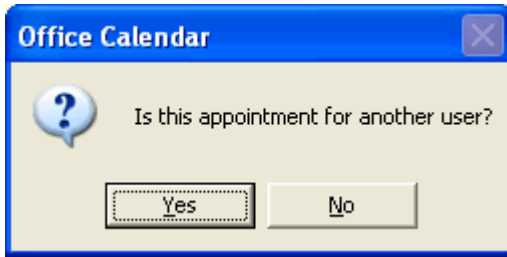
automatically in any other group calendars you are included in upon the next OfficeCalendar synchronization.

OfficeCalendar's Outlook group calendars are particularly useful when you need to determine two or more people's availability for a particular day and time. When viewing a 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).



All OfficeCalendar group calendars are editable, meaning appointments can be created, edited and deleted to/from group calendar folders. The same security rights assigned to you regarding access to other users' Outlook folders also apply to group calendar folders. With the proper security rights, you can:

- **Create appointments in Group Calendar folders.** You can create an appointment in a group calendar the same way you would create an appointment in any other Outlook calendar folder. However, upon saving the appointment, Outlook will prompt you with a pop-up message (shown below) asking if the appointment is for another user.



If you select **No**, the appointment will appear in the group calendar with only your name next to the description. If you select **Yes**, the **Select User/s** dialog box will follow, allowing you to select one or more of users and/or resources to associate with the new appointment. If you choose to select other users/resources, the appointment will be added to their individual calendar as well as any other group calendars that your co-workers are included in. Click **OK** after you are finished to exit.



- **Modify appointments in Group Calendar folders.** You can also modify appointments in group calendars just as you would any other appointment in Outlook. After an appointment is modified, it is updated in all associated Calendar and group calendar folders.
- **Deleting appointments in Group Calendar folders.** You can also delete appointments in group calendars just as you would any other appointment in Outlook. After an appointment is deleted, it is deleted from all associated Calendar and group calendar folders.

Using Outlook's Built-In "Meeting Request" Feature

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:

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<http://www.officecalendar.com>

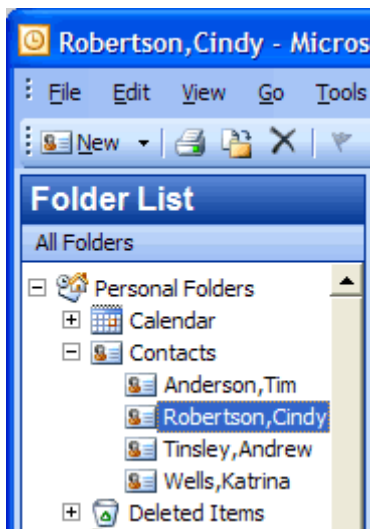
1. From the **File** pull down menu; select **New| Meeting Request**.
2. In the **To** field, type in the email address of each person for which you are requesting a meeting. Optionally, you can click the **To** button and select each persons name from your Outlook Address Book if the names of each person 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 any associated OfficeCalendar Outlook group calendars 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-workers 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:

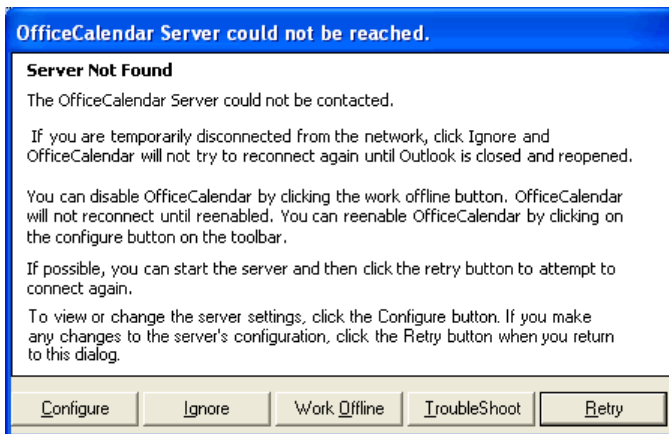
1. Create or open the task that you want to make private.
2. Select the **Private** check box in the lower right corner.
3. Click **Save and Close**.

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"* on page 53 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).



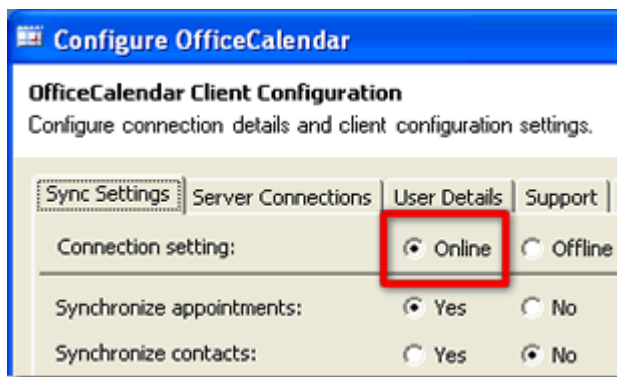
When you come back into your office, and connect to your office's network, you will want to switch back to **Online** mode. Switching to **Online** mode and running the synchronization will update all of the changes you have made to your co-workers calendar, contacts, and tasks, as well as all of the 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.

Advanced OfficeCalendar Installation for Larger Groups

Lookout Software has made several advanced configuration options available to meet the specialized needs of larger OfficeCalendar installations (50+ users). These options currently include the configuration of OfficeCalendar to use Microsoft's SQL Server as a database store, and the configuration of an Internet Free/Busy Service for Microsoft Outlook/OfficeCalendar clients. Support for these features from Lookout Software is limited, and Lookout Software assumes that end users wishing to implement these advanced features will have a general knowledge and understanding of the technologies involved. Also, the implementation of these advanced features require certain operating systems and software licenses which are not included or offered by Lookout Software as a part of the OfficeCalendar license. Refer to each specified configuration option below to determine what is required.

Configuring OfficeCalendar to work with Microsoft® SQL Server

OfficeCalendar can now be configured to use Microsoft SQL Server as its database store. However, there are no advantages to using OfficeCalendar with SQL Server unless your installation has more than 50 physical users. In fact, small installations that use OfficeCalendar with Microsoft SQL Server will likely see a significant decrease in OfficeCalendar's performance.

Larger OfficeCalendar installations (50+users) may well see greater performance in using SQL Server with OfficeCalendar. Also, those customers that have standardized on Microsoft SQL Server as their company's primary database platform are likely to have special hardware, software, and IT procedures to help them get more from their OfficeCalendar investment.

****NOTE: In order to use Microsoft SQL Server as your OfficeCalendar data store, you must supply your own Server and Client database licenses. Microsoft SQL Server and Client licenses are not included or offered by Lookout Software as a part of the OfficeCalendar license.**

Things you should know before you configure OfficeCalendar to work with SQL Server

- In order to configure OfficeCalendar to work with Microsoft SQL Server basic knowledge and understanding of SQL Server is required. If you do not have a basic level of SQL Server knowledge, we highly recommend that you consult with someone who does. In particular, you will need to know how to create a blank SQL Server Database and you will need to know how log into you SQL Server Database. Lookout Software does not offer training and/or consulting services in these areas of knowledge.

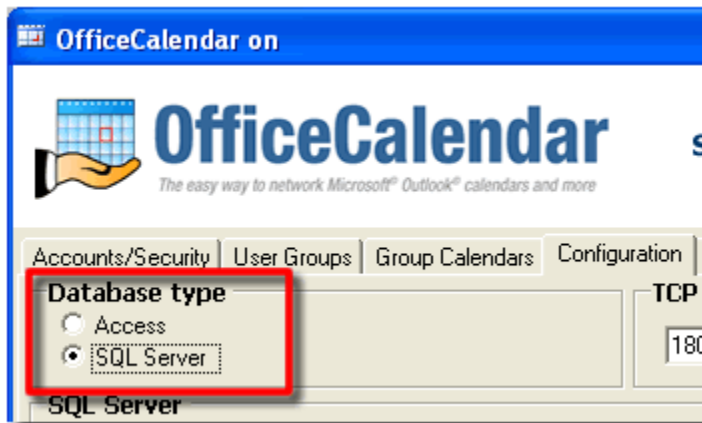
- OfficeCalendar should not be used with SQL Server with installations that have fewer than 50 employees unless they are advised to do so by the Lookout Software support department.
- Data migration from Access to SQL Server is currently not offered. Thus, to run OfficeCalendar connected to a SQL Server you will be starting from a new database and will need to set up all users, resources, employee groups, security settings, group calendars, and group calendar settings from scratch.
- If your SQL Server installation is on a separate computer from your OfficeCalendar Server you will need to open port 1433 on the SQL Server computer in order for the OfficeCalendar Server application to send and receive data to the SQL Server.
- You can NOT use OfficeCalendar to connect to an existing SQL Server Database that is used for other applications. During the OfficeCalendar Server's setup all contents of a SQL Server Database will be overwritten, and thus all existing data would be deleted.

How to configure the OfficeCalendar Server to work with a SQL Server Database

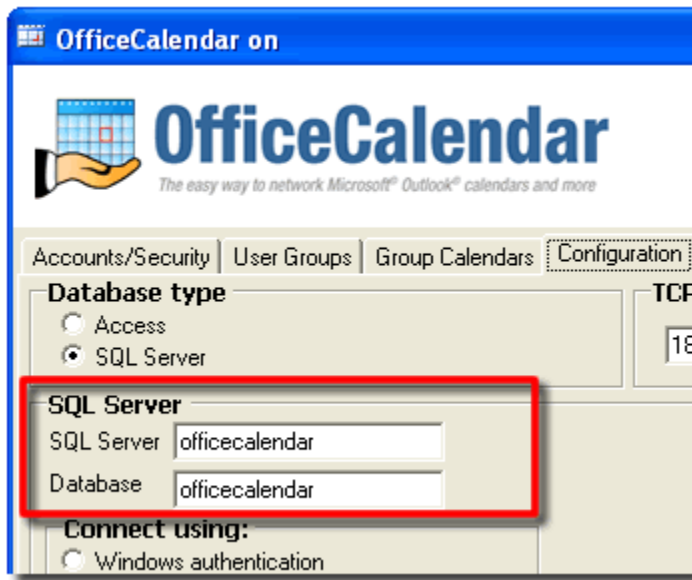
1. Create a blank SQL Server Database.

*Note: We recommend that you name the SQL Server Database **"OfficeCalendar"** for simplicity.

2. Open the **OfficeCalendar Server and Administration Console**, and click on the **Configuration** tab.
3. From the **Database type** group box, select the **SQL Server** option radio button.

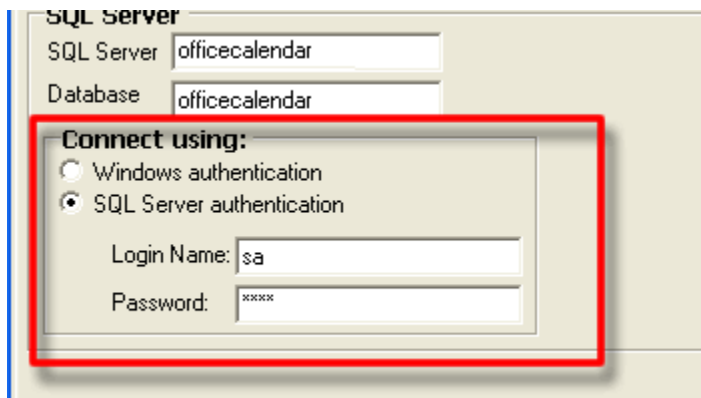


- Next, from the **SQL Server** group box, type in the name of your SQL Server (in the **SQL Server** text box) and type in the name of the database you created in Step 1 (in the **Database** text box).

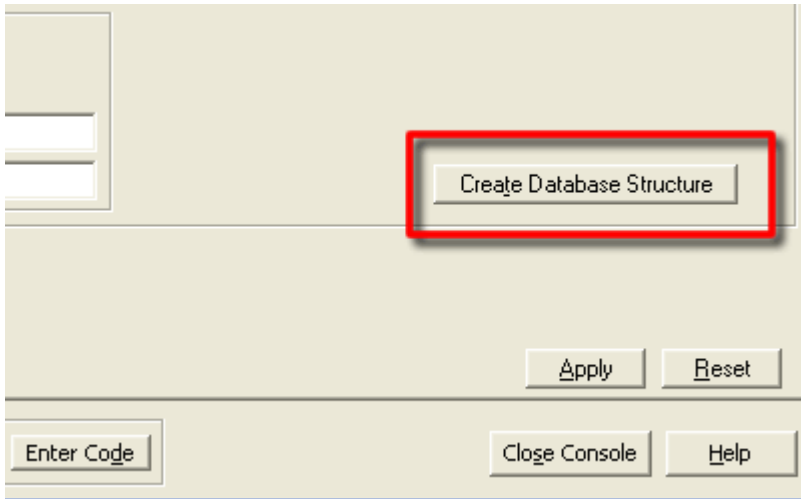


- Next, from the **Connect using** group box, choose how to connect to OfficeCalendar, using **Windows Authentication** or **SQL Server Authentication**. Once you've selected the appropriate option for connecting, type in the **Login Name** and **Password** required to connect to your SQL Server.

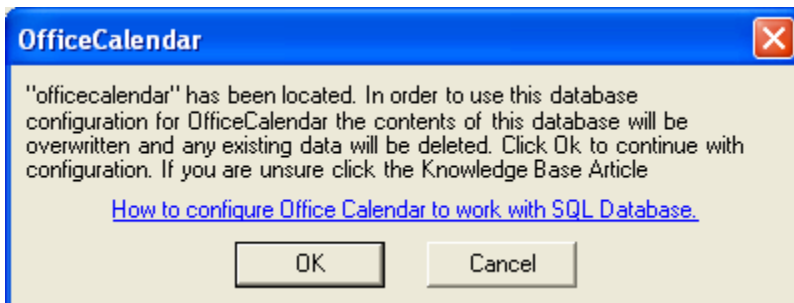
***NOTE:** If you do not know which option to use for authenticating with your SQL Server please consult with your network administrator.



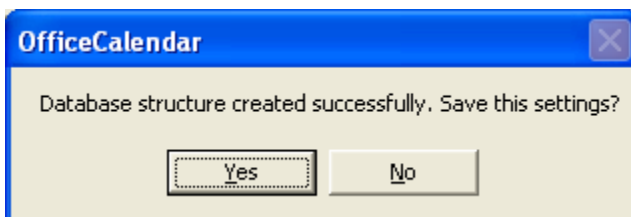
- Next, click on the **Create Database Structure** button. This will create all the tables and fields in the SQL Database necessary for the OfficeCalendar Server to properly read write to the database.



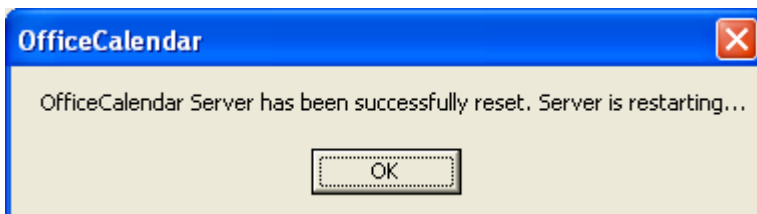
7. Next, the message below will appear; click **OK** to continue with OfficeCalendar's configuration of the database once you've read through the message box.



8. Next, the dialog box below will appear; click **Yes** to save the settings.



9. Finally, the message below will appear. Click **OK** to confirm the restarting of your OfficeCalendar Server. Please wait several minutes for OfficeCalendar to perform a complete restart.



Using OfficeCalendar's Internet Free/Busy Server for Microsoft Outlook

Internet Free/Busy (IFB) is a feature of Microsoft Outlook that allows you to see when others are free or busy so that you can efficiently schedule meetings. Outlook users have the option to publish their free/busy information to a user-specified Uniform Resource Locator (URL) file server. You can share this URL file server with all users or limit it to a specific set of users.

Lookout Software developed a new feature set in the OfficeCalendar Server and Administration Console that allows OfficeCalendar customers to create a Microsoft Outlook Internet Free/Busy Server. This feature also automates the configuration of publishing and retrieval of Free/Busy files for all Microsoft Outlook clients that utilize OfficeCalendar.

In summary, here is how the process works:

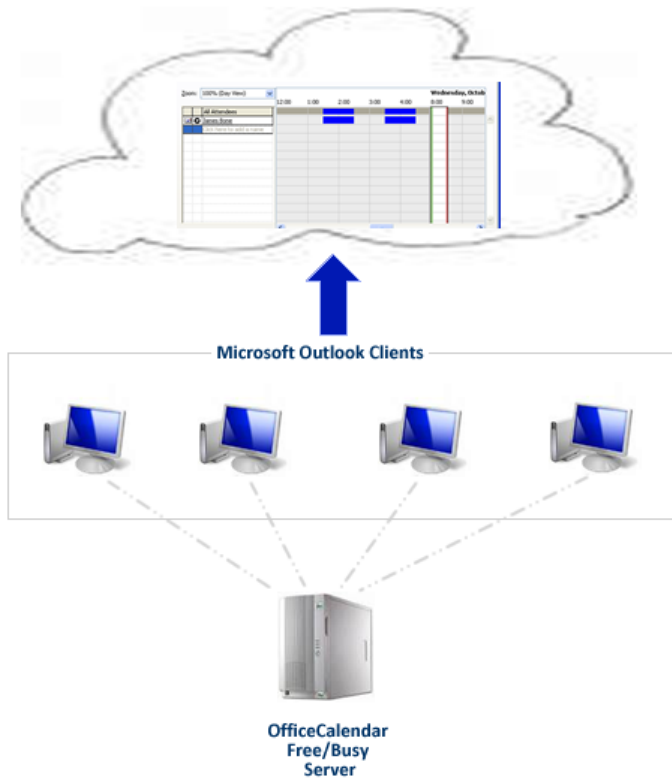
Initial Setup and Configuration

First, OfficeCalendar's Server and Administration Console automates the configuration of a URL-based file server (utilizing Microsoft IIS with FTP) to act as a Free/Busy Server that allows the publishing and retrieval of Free/Busy files from Microsoft Outlook clients with a few simple mouse clicks. At the same time, the OfficeCalendar Server creates a configuration file for each OfficeCalendar user which, upon each user's next synchronization, configures each user's Microsoft Outlook Free/Busy options with the appropriate Free/Busy *publishing* and *search* locations.

Outlook Automatically Publishes and Retrieves Free/Busy Information

Each OfficeCalendar user's Outlook client then publishes their Free/Busy data, and retrieves other OfficeCalendar user's Free/Busy data on a regular basis (this is very similar to how each OfficeCalendar client automatically synchronizes with the OfficeCalendar Server). OfficeCalendar users then utilize Microsoft Outlook's built-in *Scheduling* viewer (shows selected Attendees Free/Busy time) to determine appropriate time slots for scheduling a meeting when using Outlook's Meeting Request feature.

OfficeCalendar's Microsoft Outlook Free/Busy Internet Service



Things you should know before using OfficeCalendar's Internet Free/Busy Server for Microsoft Outlook

- OfficeCalendar's Microsoft Outlook Free/Busy Server must be installed on the same computer in which your OfficeCalendar Server is installed.
- The computer in which your OfficeCalendar Server is installed must have Microsoft Internet Information Services 5.0 or higher (IIS) and FTP services installed.
- An exception for Port 21 must be enabled on your OfficeCalendar Server computer's firewall in order for OfficeCalendar's Free/Busy Server to work. This is the default port for FTP services.
- Lookout Software assumes that those customers who wish to use OfficeCalendar's Microsoft Outlook Free/Busy Server possess a basic knowledge and understanding of Microsoft IIS 5.0+, FTP, Web Servers, and Network Permissions. The applications/services above are developed by Microsoft Corporation, and Lookout Software does not provide training, consulting or

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<http://www.officecalendar.com>

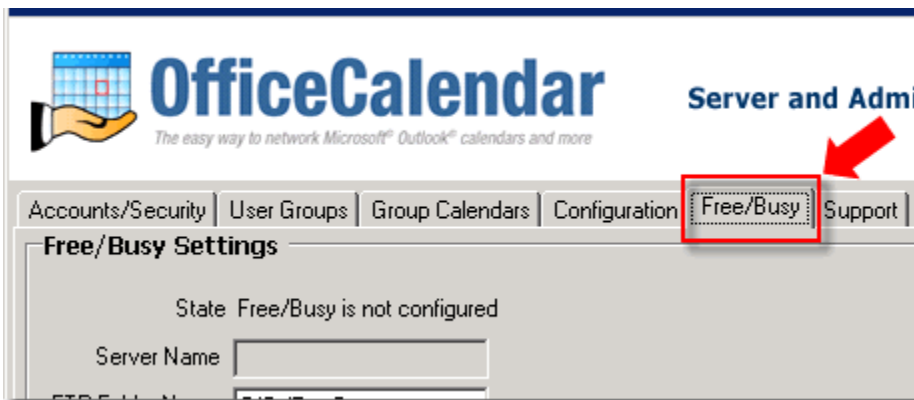
75

support for them. Please contact your system administrator, local computer networking consultant or Microsoft Corporation should you require general setup, configuration or troubleshooting advice and support for them.

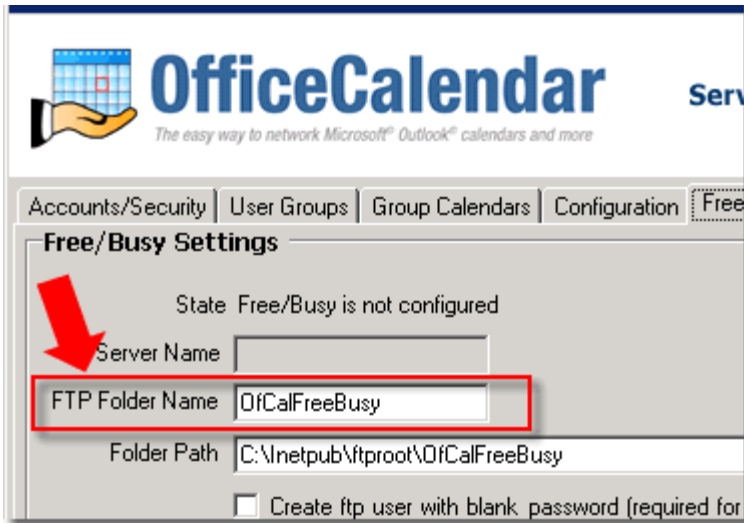
- **ALERT for installations with Outlook XP Users - Outlook XP can not properly store usernames and passwords in order to pass them to an FTP Server for authentication. The only consistent way to make this work that OfficeCalendar developers have found for this problem involves changing the Windows registry of your server computer to allow users to log into it with a blank password. WE DO NOT RECOMMEND THAT YOU USE THIS OPTION AS IT POSES A SEVERE SECURITY RISK TO YOUR SERVER COMPUTER. However, this option is available assuming you understand and are willing to assume this risk. If you do not wish to assume this risk, then it is recommended that you either upgrade all of users to a newer version of Microsoft Outlook (Outlook 2003 or higher) and resume your setup of the OfficeCalendar Free/Busy Server once that is completed; or simply abandon the setup of OfficeCalendar's Free/Busy Server all together.**

How to Setup OfficeCalendar's Internet Free/Busy Server

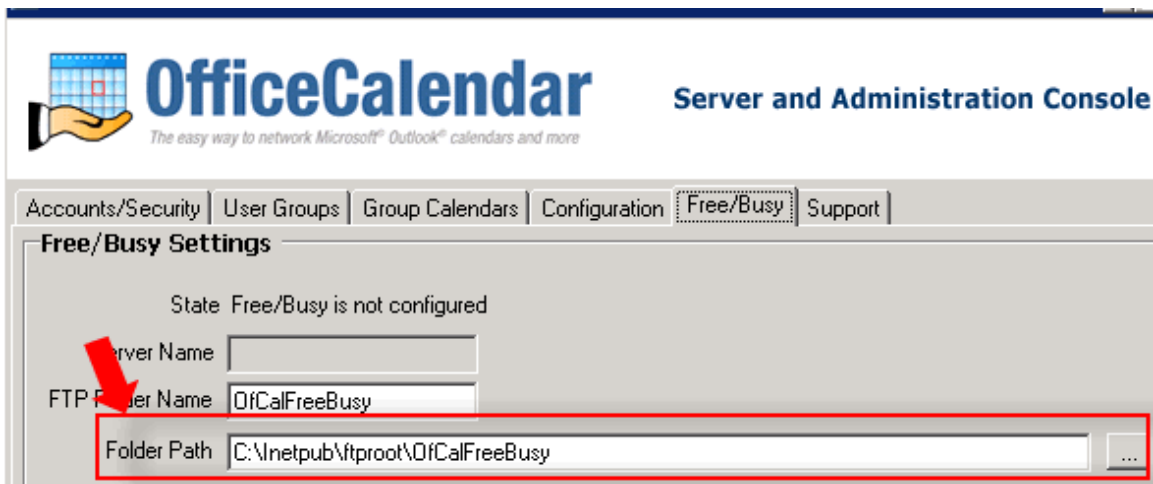
1. From the computer in which the OfficeCalendar Server is installed, ensure that Microsoft Internet Information Services (IIS) version 5.0 or higher and FTP Publishing are installed and started and both services are started.
2. Open the OfficeCalendar Server and Administration Console, and click on the **Free/Busy** tab.



3. In the **FTP Folder Name** field; type in the name of the FTP folder you wish OfficeCalendar to create. OfficeCalendar has default name of **OfCalFreeBusy** in this field. It is highly recommended that you use this default name.



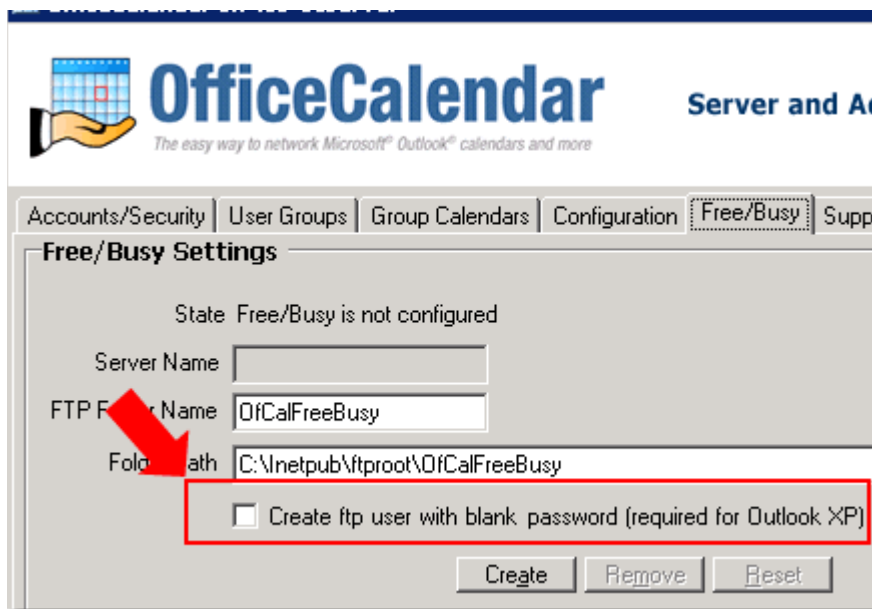
4. In the **Folder Path** field, set the path to your *ftproot* folder. OfficeCalendar applies a default path of **C:\inetpub\ftproot\OfCalFreeBusy** for the Folder Path field. Assuming you have installed Microsoft IIS and FTP Services with their default configurations, there should be no need to change the path. Again, we highly recommend using OfficeCalendar's default settings when possible.



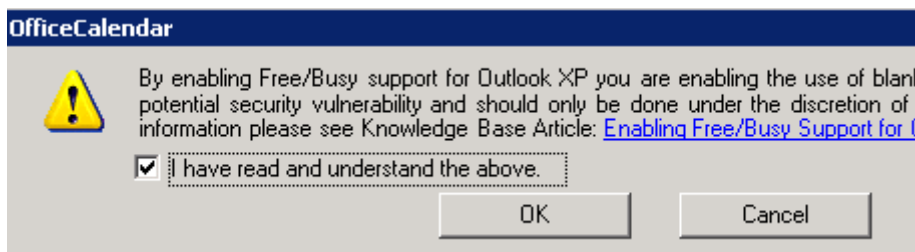
5. If you have no Outlook users currently using Outlook XP, proceed to *Step 6*. If you do have users currently using Outlook XP proceed to *Step 5a*.
 - a. **WARNING:** Outlook XP can not properly store usernames and passwords in order to pass them to an FTP Server for authentication. The only consistent way to make this work that OfficeCalendar developers have found for this problem involves changing the Windows registry of your server computer to allow users to log into it with a blank password. **WE DO NOT RECOMMEND THAT YOU USE THIS OPTION AS IT POSES A**

SEVERE SECURITY RISK TO YOUR SERVER COMPUTER. However, this option is available assuming you understand and are willing to assume this risk. If you do not wish to assume this risk, then it is recommended that you either upgrade all of users to a newer version of Microsoft Outlook (Outlook 2003 or higher) and resume your setup of the OfficeCalendar Free/Busy Server once that is completed; or simply abandon the setup of OfficeCalendar's Free/Busy Server all together. If you fully understand and are willing to assume this risk, then proceed to *Step 5b*.

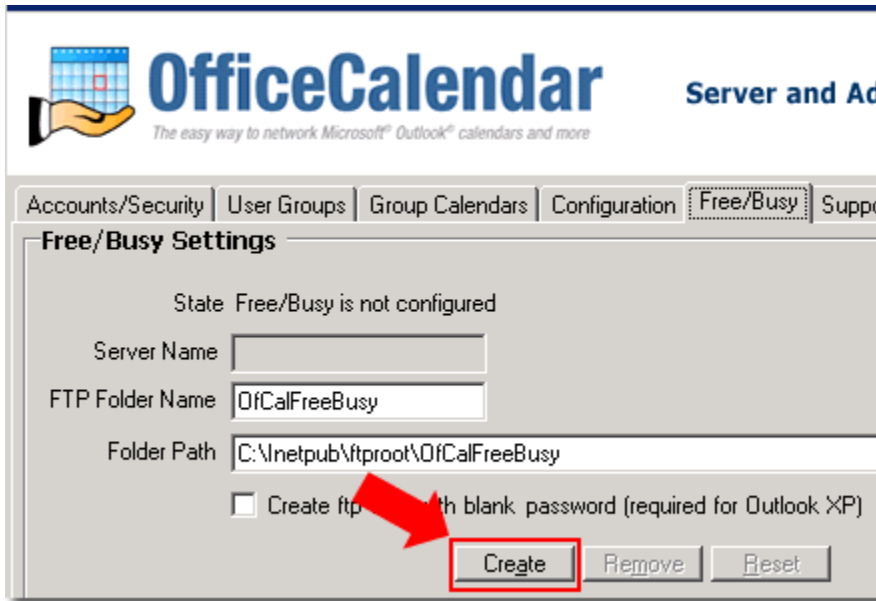
- b. Once you have read, understood and have determined you are willing to assume the risk, check the box **Create FTP user with blank password (required for Outlook XP)**. Click the check box...



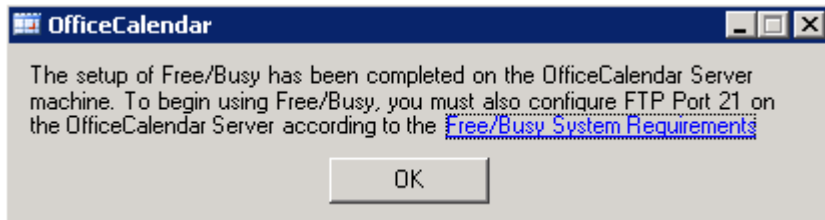
Once this box is checked, the dialog below will appear. Again, once you once you have read, understood and have determined you are willing to assume this risk, check the box **I have read and understand the above**, and click **OK**.



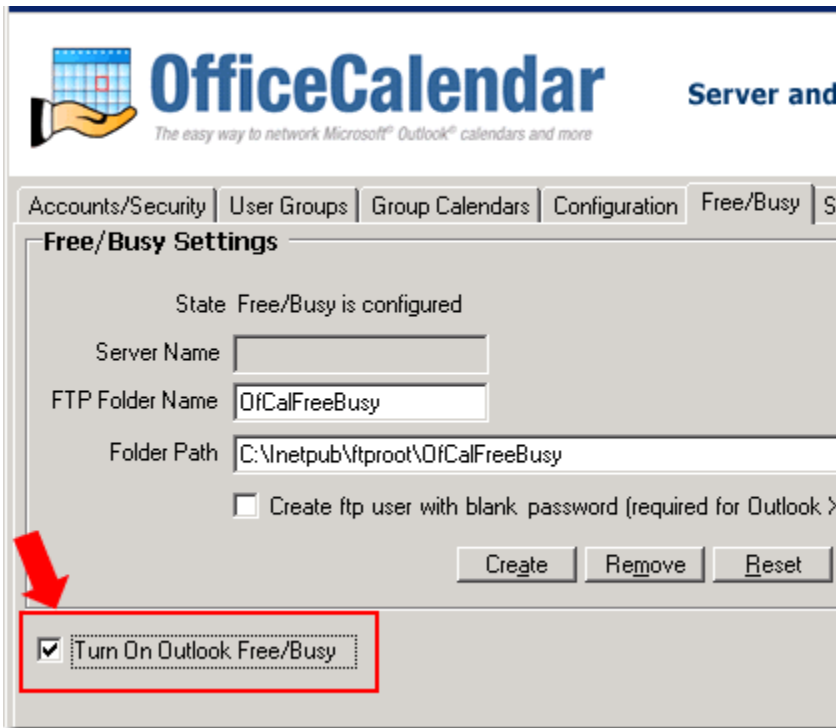
- Once you've ensured that settings in *Steps 3 and 4* are correct; click on the **Create** button.



A dialog will appear with a notification that the Free/Busy setup is complete along with a reminder that you must configure FTP Port 21 on your server computer; click **OK**.

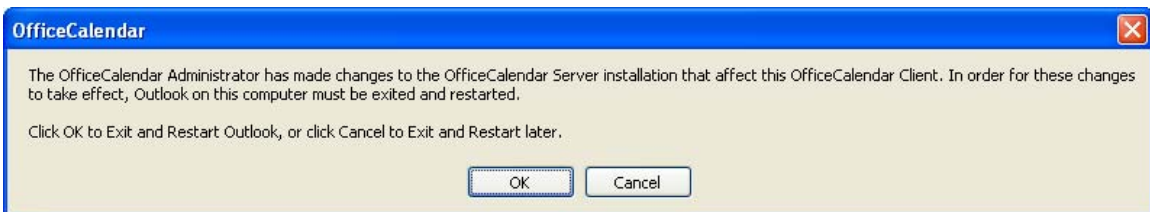


- Click the **Turn On Outlook Free/Busy** check box to start the OfficeCalendar Free/Busy Server.



OfficeCalendar's Free/Busy Configuration for Microsoft Outlook Clients

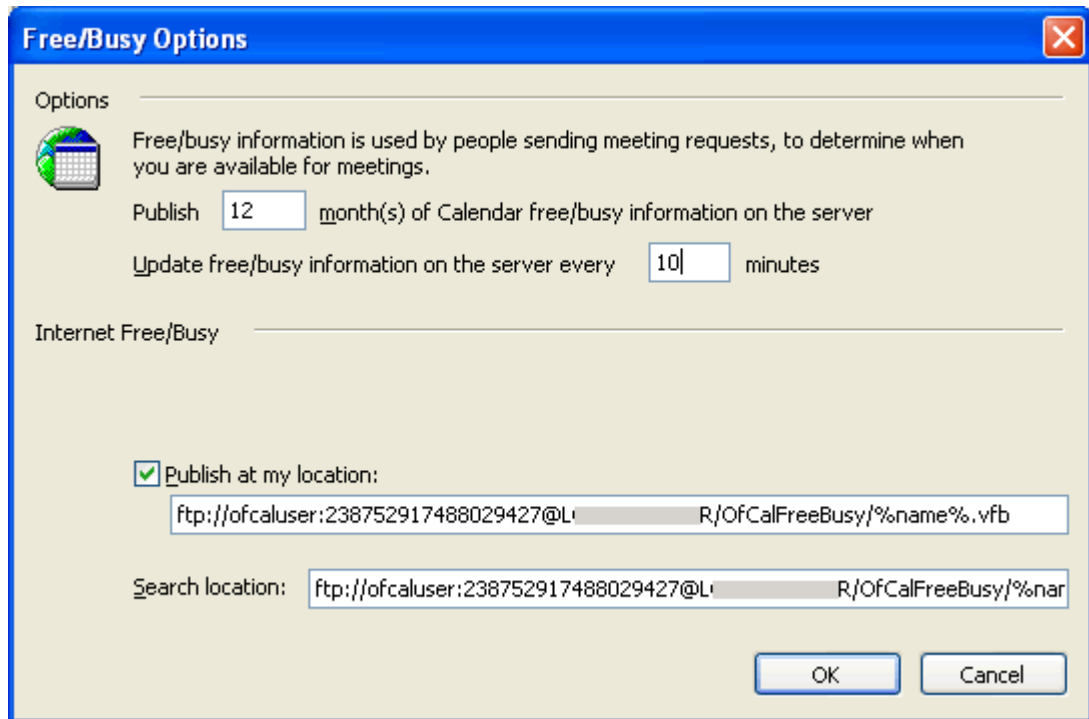
1. Once the OfficeCalendar Free/Busy Server has been setup and turned by an OfficeCalendar administrator, each OfficeCalendar user will see the follow message within Microsoft Outlook upon their next synchronization with the OfficeCalendar Server...



Once Outlook is restarted, the Outlook client is fully configured to send and received Internet Free/Busy files. Please note, it may take several hours before all user data is visible as all users must go through this process before their Free/Busy data is published and retrieved by others.

2. If a user wishes, they can set the number of month(s) of calendar free/busy information in which they publish for others to see, and set how often free/busy information is updated within their Outlook. To access these settings:

- a. Open Microsoft Outlook.
- b. From the **Tools** menu; click **Options**.
- c. From the *Options* dialog box; click the **Calendar Options** button.
- d. From the *Calendar Options* dialog box; click on the **Free/Busy Options** button.
- e. From the *Free/Busy Options* dialog box; locate the Options group settings and change them to preference, and click **OK**.



How to Plan a Meeting Using Internet Free/Busy Information

1. In the Calendar folder, click **New Meeting Request** on the **Actions** menu.
2. On the **Scheduling** tab, type the name of each attendee in the **All Attendees** box. Outlook follows the URL path (as previously specified) for the individuals that you invite and automatically inserts their free/busy information in the planner.

Outlook publishes and retrieves free/busy information every 15 minutes by default. You can manually override this time increment by pointing to **Send And Receive** on the **Tools** menu, and then clicking **Free/Busy Information**. This updates the free/busy information immediately.

"Sharing Microsoft Outlook Calendar and Contacts without Exchange Server"

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<http://www.officecalendar.com>

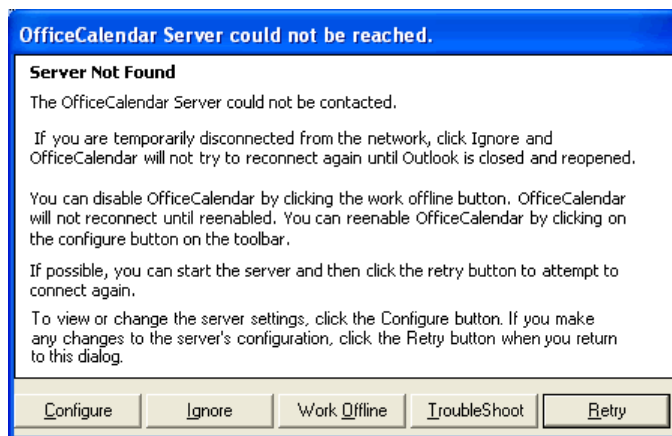
Purchasing OfficeCalendar licenses

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:

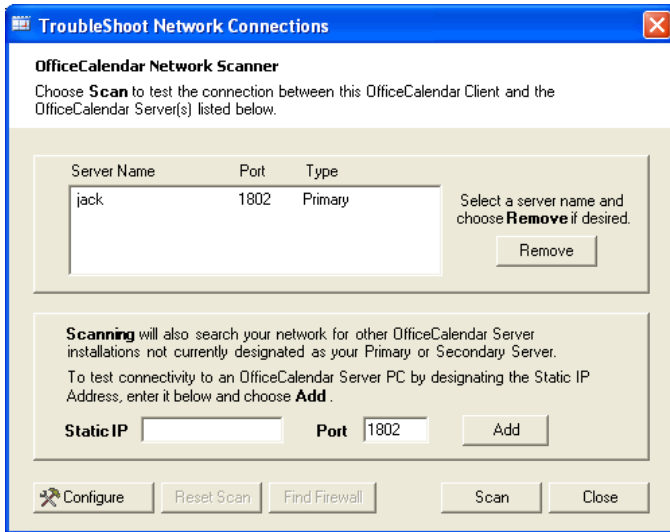
866-847-7512 (toll free)
214-329-4500 (direct dial)
sales@officecalendar.com

Getting Help with OfficeCalendar

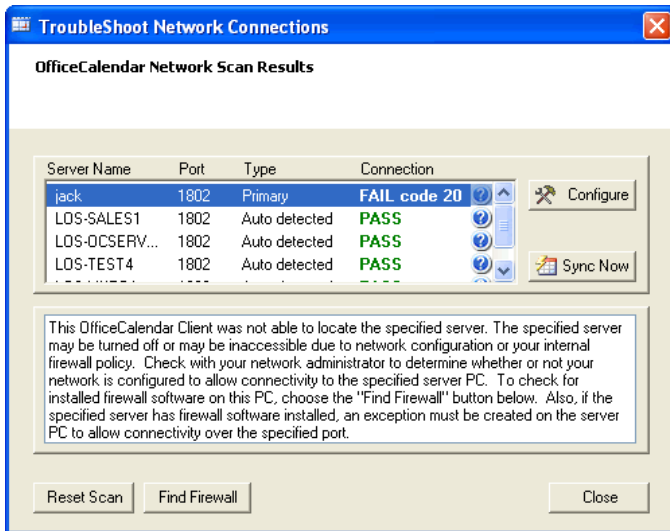
If the OfficeCalendar Server cannot connect to your network once OfficeCalendar tries to synchronize, the **OfficeCalendar could not be reached** dialog box will appear.



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.

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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.