INSTALLATION AND USER'S GUIDE

OfficeCalendar for Microsoft® Outlook™

Sharing Microsoft Outlook Calendar and Contacts without Exchange Server

By Lookout Software

OfficeCalendar

Contents

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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 email, contacts, distribution lists 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.

Each person wishing to share Outlook calendars, email, contacts, tasks, and/or distribution lists with OfficeCalendar must have a copy of Microsoft Outlook 2000, XP, 2003, 2007 and 2010. 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 it will create sub-folders under each of your Outlook objects (calendar, contacts, tasks and email) for each other person that is sharing their Outlook information with you. For example, if you have four users sharing Outlook with each other, OfficeCalendar will configure your Calendar folder structure similar to the illustration below.
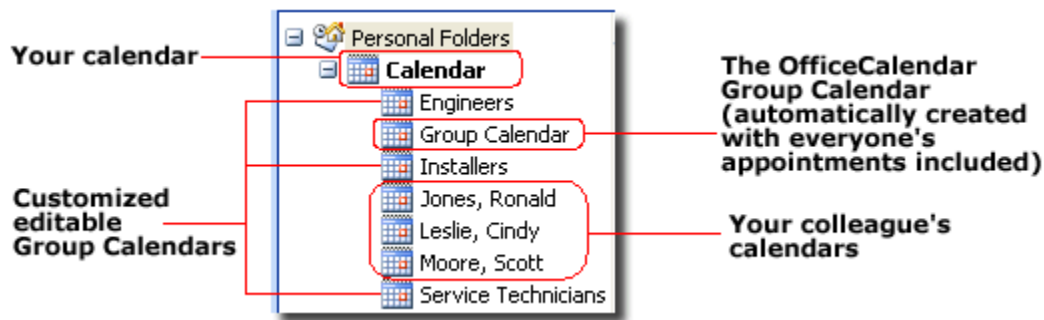
Your personal Outlook calendar is always at the top of the calendar structure (this is the same for your Outlook contacts and tasks as well). Each other person you are sharing Outlook calendars with is listed by name directly under your calendar along with customized group calendars that show multiple users' appointments rolled into a single calendar view (see "Customized editable Group Calendars" caption above).

Shared Outlook email folders also appear as sub-folders, but you can change the name of the shared folder that will display under your Inbox once you've accepted the invitation from another user to share their email folder.

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. Each change made to your Outlook calendar, contacts and tasks by other users will prompt a notification of their change during your next sync. All changes made to an Outlook appointment, contact, distribution list and task are also documented in a history report for easy reference.

Notice to OfficeCalendar On Demand Users

OfficeCalendar On Demand users will access the Administration Console differently and see some differences in the Administration Console screen shots and instructions included in this guide. This is due to certain features not being applicable for OfficeCalendar On Demand users.

OfficeCalendar Version 8 Update Notice

Since this document was last written OfficeCalendar Version 8 was released adding the sharing of Outlook Notes in addition to Calendar, Contact and Tasks and Email.

OfficeCalendar Installation Overview

Things to consider when downloading OfficeCalendar

1. You can choose to run the OfficeCalendar Server app on our servers using **OfficeCalendar On Demand**, or you can install it locally on one of your PCs/Servers. If installing locally, please note that OfficeCalendar does not require a network to run. You can share your Outlook data using an internet connection. You can view our knowledge base article on setting this up by clicking here http://officecalendar.crmdesk.com/answer.aspx?id=4

2. OfficeCalendar has a Client/Server architecture, meaning that multiple Outlook Clients communicate via 1 central Server app. You should run only 1 Server app, therefore, do not download the trial onto each workstation. Either sign up for OfficeCalendar On Demand, or download 1 trial to the machine that is going to run the OfficeCalendar Server application.

3. The OfficeCalendar Server app does not require an actual server machine to run. You can run the Server app on any PC, including a PC that will also run the OfficeCalendar Client app. The Server app does not require Outlook to be present on the machine where it is installed.

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4. If installing locally, you will download only 1 trial installation file, and it will be to the machine where you are going to run the OfficeCalendar Server app. This download contains everything you need to install, set up and use OfficeCalendar.

5. The trial version is the full product, with absolutely no feature limitations. The OfficeCalendar Server will stop syncing in 14 days from the date of installation. If it expires, you will not lose any Outlook data. After purchasing, a keycode can be generated from our website that will license your installation permanently.

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/download.aspx.

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

ocinstall.exe

3. Please choose which installation/setup you would like to run. The OfficeCalendar Sever can be run on our Servers via *OfficeCalendar On Demand* **[EASIEST]**, or you can choose to run it locally **[EASY]**.
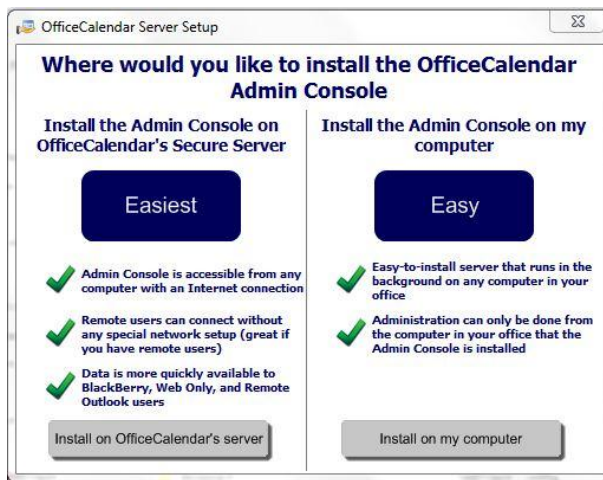
*If you choose to use **OfficeCalendar On Demand**, once you click **Install on OfficeCalendar's server**, you will be presented with a form. Once the form is completed, you will automatically receive an Account Activation email with further instructions. Please follow those instructions and then skip to step #7.*

4. During the installation, you will be prompted to choose the **Default** or **Advanced installation**. We recommend that our users choose the Default installation. This makes it easier to troubleshoot issues later on.

5. Click **NEXT** when prompted during the installation.

   OfficeCalendar requires Microsoft.Net Framework V2.0 or higher be installed on any machine running the OfficeCalendar Server or Client apps. The installer will auto detect if you do not have the required installation and prompt to you install the proper version. Please follow the instructions on the screen if prompted for this.

6. At the end of the installation, you will be given the option to **Install Client files locally now.** Choose this option if this machine has Outlook installed and will be used as an OfficeCalendar Client. Otherwise, choose **I don't need to install the OfficeCalendar Client files locally**.

7. After you are finished, you will now see the Setup Wizard. The OfficeCalendar Admin Console will be open in a window behind it, but please proceed with using the Setup Wizard to configure your new OfficeCalendar Server installation. <u>NOTE: OfficeCalendar On Demand Users will not see all the steps included in the Setup Wizard because some were completed during the Account activation process.</u>

   a. **Administrator**: enter the information for each user who will have rights to log into the Admin Console. You must have at least one Administrator, so by default, the first User ID you enter will be an Administrator. This can be changed later.
   b. **Users**: each Outlook user, or Online/Mobile user, will need a User ID. Only select Online/Mobile User if this user does NOT have Outlook.
   c. **Resource Folders**: enter a folder name, and select a folder type, here when you need to create a shared calendar/contact/task folder in Outlook. OfficeCalendar will create a blank folder on its first sync.
   d. **Security**: assign permissions for your users by selecting each user from the drop down menu on the left, and then checking what permissions they should have to the other user's Outlook folders.
   e. **Online Database**: this screen will walk you through setting up your OfficeCalendar Online account, so your users can have secure web access to their Outlook data from anywhere in the world.
   f. **Email Users**: enter each user's email address and OfficeCalendar will email them simple to follow instructions for installing and setting up the OfficeCalendar Client. If you do not have a way to email from the server machine, you can skip this step. Client installation instructions are included below.

g. **Admin Document**: this document contains all your critical setup information (User IDs, passwords, etc…) for reference later. You can choose to Save or Print the document. Anytime you make changes to the critical information in your OfficeCalendar Admin Console, you will be prompted to Save or Print a new Admin Document.

Install the OfficeCalendar Client add-in for Outlook

a. If you chose to include the email addresses for your users when prompted by the Setup Wizard, then please refer to the set of instructions that was emailed to them.

b. If you installed the OfficeCalendar Server locally, and chose not to email instructions to each of your clients, please do the following:

1. Browse from the each client to the folder on the server machine that contains the OfficeCalendar client installation file by doing the following   Start > Run > *SERVERNAME*\OCALCLIENT. If you don't have "Run" as an option, just type the same network path in the "Search Programs and Files" field. The SERVERNAME is the computer name of the machine where you have installed the OfficeCalendar Server and is listed in your Admin Document (also, you can right click *Computer > Properties > Computer Name*)

   If you receive a windows message stating that it cannot find the path, please check to make sure you've typed the path correctly, are using the proper server name, and that you are networked with the server machine.

2. Double click the client installation file **Setup8000** to launch the Client installer and click **Finish** when prompted.
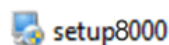
   setup8000

3. If you are using **OfficeCalendar On Demand**, and chose not to email instructions to each of your clients, please do the following:

   i. Click the following link http://officecalendar.fileburst.com/clfull/setup8000.exe and then double click the Setup8000 file to launch the Client installer. Click **Finish** when prompted

3. Open Microsoft Outlook on your computer.

a. The OfficeCalendar Client added the OfficeCalendar toolbar as well as an OfficeCalendar menu option to your Microsoft Outlook toolbar (shown in the illustration below).
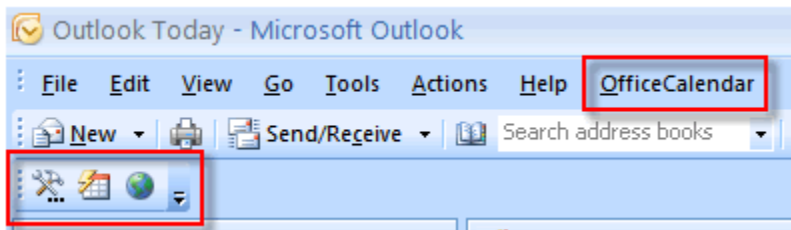
i. If using **OfficeCalendar On Demand**, you will need to configure your OfficeCalendar Client to sync with your account, so please click the OfficeCalendar Client Configuration button (hammer & wrench) > Server Connections tab.
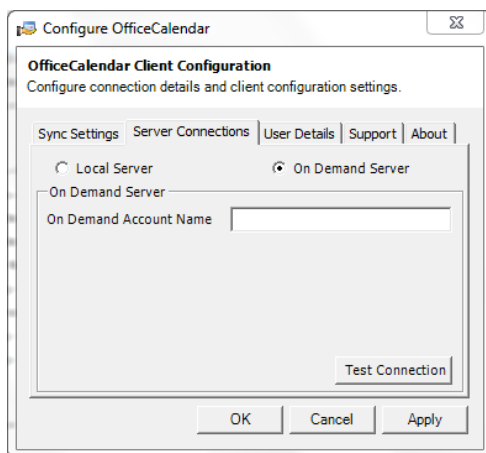
ii. Enter your **OfficeCalendar On Demand** Account name in the proper field, and then click **Test Connection** to make sure everything is configured correctly. If the test comes back successful, click **OK**. If the test fails, please check your On Demand Account Name and try again.

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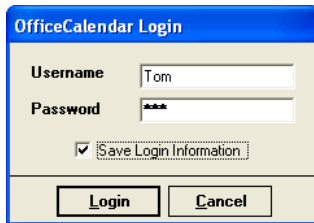
You'll notice that the synchronization icon will change states to while your Outlook is synchronizing with the OfficeCalendar Server. Once the synchronization is complete it will change back to its original state.

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). **To see your Folder List, in Outlook click *Go > Folder List***

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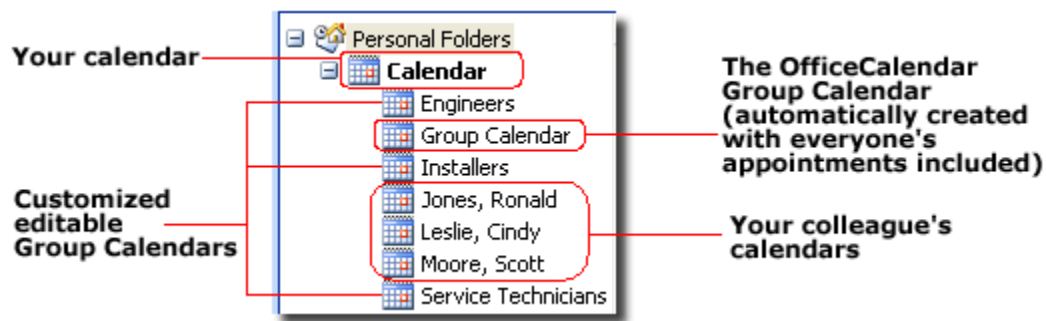
Once other users have synchronized their Outlook data with the OfficeCalendar Server, their folders will appear in your Outlook folder list during your subsequent synchronizations.

Setting up and sharing your Outlook email folders with OfficeCalendar is different than setting up and sharing your Outlook calendar, contact and task folders. OfficeCalendar email sharing uses your Outlook email send/receive synchronization to share your email folders with other users. Please refer to the OfficeCalendar Installation and User's Guide for instructions on setting up, configuring and using OfficeCalendar email sharing.

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Instantly Updating your Outlook Calendars, Contacts and Tasks with your OfficeCalendar Online Account

Once all users' profiles have been synchronized to your organization's OfficeCalendar Online account through the OfficeCalendar Administration Console (for steps on how to do this, refer to the topic **"Configuring your organization's OfficeCalendar Online account"** in the Guide to OfficeCalendar Online and OfficeCalendar Mobile for BlackBerry), you can begin synching each client's Outlook information to their OfficeCalendar Online account so they can access their Outlook calendars, contacts and tasks online.

1. Open Microsoft Outlook

2. Click the Synchronize OfficeCalendar Online icon.

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

You will not notice any changes in Microsoft Outlook. By synchronizing your Outlook with your organization's OfficeCalendar Online account, all of your Outlook calendar, contact and task folders are now available online for access and editing through your individual OfficeCalendar Online login, set up through the OfficeCalendar Administration Console. For instructions on how to access OfficeCalendar Online, see section **"Accessing your Outlook Calendars, Contacts and Tasks with OfficeCalendar Online"** on page 90.

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 Administration Console**.

From the OfficeCalendar 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.
- Manage your settings for your organization's OfficeCalendar Online account.

To access the OfficeCalendar Administration Console double-click on the **OfficeCalendar Admin** icon on the desktop of the computer in which it is installed.

Log into the admin console using the Username and Password you supplied to create the administrator's account (if you've done so already – if not, the admin console will open to the OfficeCalendar Quick Setup Wizard).

Adding New OfficeCalendar User Accounts

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

2. From the **Home** tab's **Accounts/Security** panel click the **Add New** button.

Add New

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"* 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"* 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 can be assigned as an OfficeCalendar Administrator.

Also, if the user does not use Microsoft Outlook (uses OfficeCalendar Online web interface only) be sure to check the **Online Only/Mobile User** check box. OfficeCalendar handles some administrative functions differently for those users that only user the OfficeCalendar Online interface.

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.

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-Or-

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

Editing OfficeCalendar User Accounts

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

2. Click on the **Advanced Features** tab, and click the **User Groups** button.
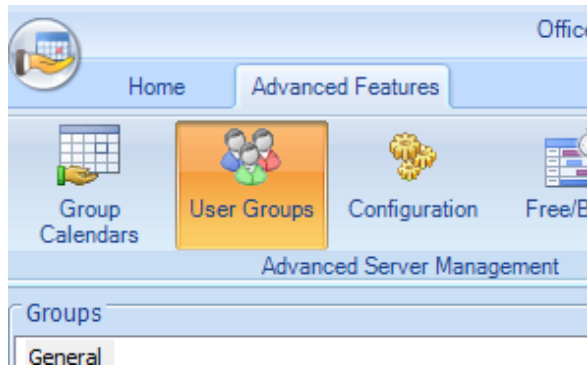
3. Click the **Add New** button…

4. Enter the **Name** for the new user group, and then click **OK**.
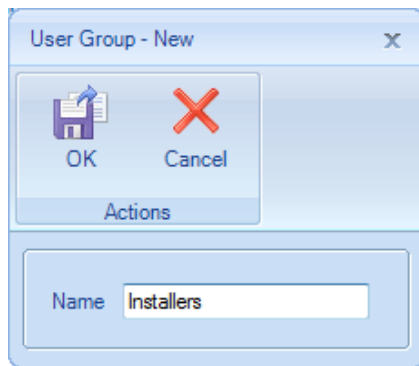
Editing OfficeCalendar User Groups

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

2. Click on the **Advanced Features** tab, and click the **User Groups** button.

3. Click on the **Edit** button.

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

Deleting OfficeCalendar User Groups

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

2. Click on the **Advanced Features** tab, and click the **User Groups** button.

3. 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"**).

   a. 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.

   b. 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 Administration Console**.

2. Click on the **Advanced Features** tab, and click the **User Groups** button.

3. 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.

4. Click on the **Move to Group** button.

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

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.

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

- **None** – check the **None** access checkbox if you do not want a user to have any rights at the time of creation. Larger organizations will find this useful to avoid changing the default security settings for long user lists.

- **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. **NOTE: Use caution when granting another user Delete access. A user with delete access can delete items from a shared folder at any time, and once an Outlook item is deleted it may not be recoverable.**

- **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 Administration Console with their user account's user name and password.

The same security rights that apply to the Outlook Contacts folder apply to Outlook Distribution Lists because they are objects within the Contacts folder. For example, if User A has read, write and/or delete security rights to User B's Contacts folder, then User A will be able to read, write and/or delete distribution lists within User B's Contacts folder.

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

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

2. Click on the **Accounts/Security** icon in **Home** tab.

3. From the **User/Resource List**, highlight the user account you want to edit.

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

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

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Quick Tip

If a user without the proper security rights to another user attempts to modify an Outlook element in a shared folder, a message will prompt on the next synchronization notifying the user that he/she does not have the rights to do so and the element will return to its original state.

For example, if User A does not have the rights to delete appointments in User B's calendar, but does so regardless; a security rights notification message similar to the one below will appear on User A's next sync and the appointment will reappear in User B's calendar.


```
1 OfficeCalendar Alert                                              ☒

-------------------------------------
You do not have proper security settings in the OfficeCalendar Admin Console to delete calendar
item 'Meeting'. Your changes were discarded. Please contact your administrator if you feel this is
in error.




                              [ Close ]
```
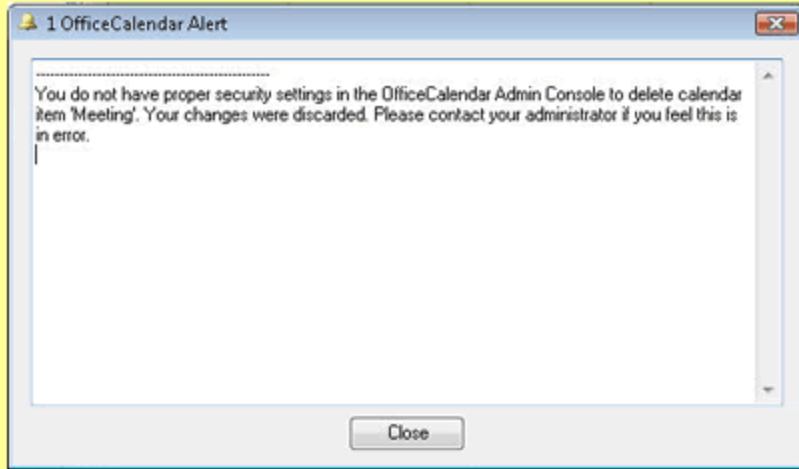
Sample Security Settings

In the following example we will set Nicole Kennedy's security access to the following criteria:

- Nicole can read, write/edit, and delete appointments on Justin Jackson's, Catherine Jones' and Ben Robinson's calendars; but has no access their contacts and tasks.
- Nicole has no access Jenna Black's Outlook items.

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User ID	First Name	Last Name	Type	
Nikki	Nicole	Kennedy	A	
Justin	Justin	Jackson	U	
Cat	Catherine	Jones	U	
Ben	Ben	Robinson	U	
Jenna	Jenna	Black	U	

User	Folder Type	Read	Write	Delete	
Justin	Calendars	☑	☑	☑	
Justin	Contacts	☐	☐	☐	
Justin	Tasks	☐	☐	☐	
Cat	Calendars	☑	☑	☑	
Cat	Contacts	☐	☐	☐	
Cat	Tasks	☐	☐	☐	
Ben	Calendars	☑	☑	☑	
Ben	Contacts	☐	☐	☐	
Ben	Tasks	☐	☐	☐	
Jenna	Calendars	☐	☐	☐	
Jenna	Contacts	☐	☐	☐	
Jenna	Tasks	☐	☐	☐	

Note about "Read" Security Access:

In the example above, Nicole does not have **Read** access to Justin's, Catherine's, Ben's or Jenna's contact or task items. Therefore, OfficeCalendar will not create **Contacts** or **Tasks** sub-folders for Justin, Catherine, Ben or Jenna in Nicole's copy of Microsoft Outlook.

Managing OfficeCalendar shared resource folder accounts

With OfficeCalendar you can create and share unlimited Outlook Calendar, Contact and Task resource folders. Resource folders are Calendar, Contact and Task 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, Contact and Task folders in Outlook which are typically used for things like a company contacts folder, a firm-wide trial calendar (for attorneys), a conference room scheduler, a team project task list etc.

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 Administration Console**.

2. From the **Home** tab's **Accounts/Security** panel click the **Add New** button.

Add New
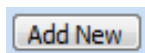
3. From the User's Detail dialog box, first click on the Create user as resource checkbox

   …you'll get a pop-up dialog box asking you to confirm the creation of a resource user; click OK to continue...

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Check the folder type checkbox you wish to create: **Calendar, Contacts or Tasks (in this case we are creating a Calendar)**.

In the Folder Display Name field type in the name you wish the folder to be displayed as in everyone's folder list; and click **Save & Close**.

Editing and deleting shared resource folder accounts

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

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"* for more information about OfficeCalendar's Outlook group calendars.

Adding Group Calendars

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

2. Click on the **Advanced Features** tab; and click the **Group Calendars** icon.

3. Click the Add New button, enter the **Name** for the new group calendar, and then click **OK**.
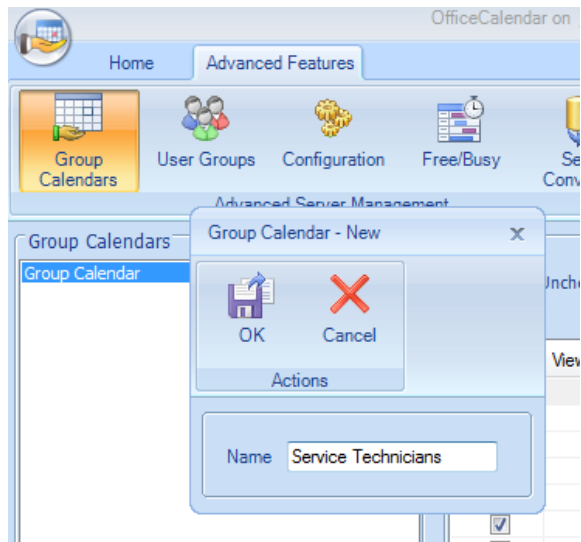
**NOTE: For technical reasons, you cannot create a group calendar with the same name as an existing User or Resource defined within the OfficeCalendar User/Resource List.

Editing Group Calendars

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

2. Click on the **Advanced Features** tab; and click the **Group Calendars** icon.

3. Highlight the group calendar you want to edit and click the **Edit** button.

4. 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 Administration Console**.

2. Click on the **Advanced Features** tab; and click the **Group Calendars** icon.

3. Highlight the group calendar you want to edit and click the **Delete** button.

4. 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.
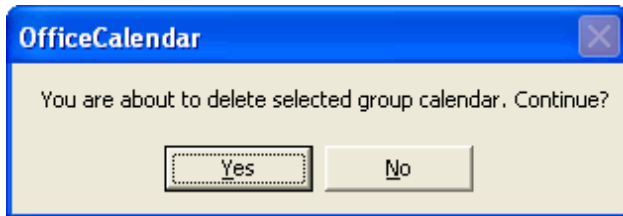
Use extreme caution when deleting a group calendar folder, as this action affects all users associated with the group calendar. However, if a group calendar folder is inadvertently deleted, it may be recreated by adding it again.

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 Administration Console**.

2. Click on the **Advanced Features** tab; and click the **Group Calendars** icon.

3. Click on the **Group Calendars** tab. Under **Group Calendars**, highlight the group calendar you want to add users to or give viewing access to.

4. Under **Users**, click on the appropriate **In Group** and/or **View Group** checkboxes next to the user(s) listed.
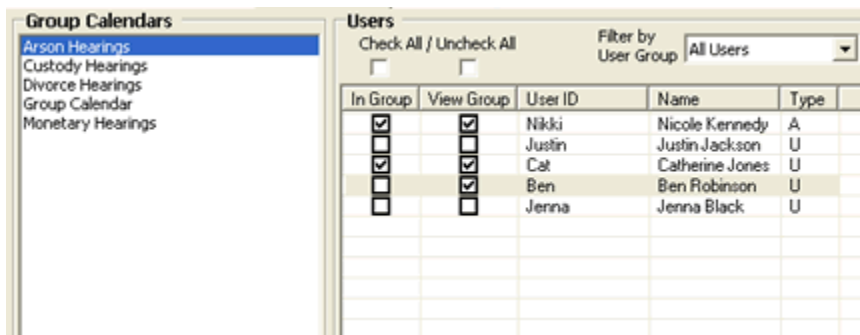
In the above example, both Nicole's and Catherine's appointments will appear in the Group Calendar "Arson Hearings" as both have the **In Group** option selected. Also, both Nicole and Catherine will see the Group Calendar "Arson Hearings" from within the Outlook folder list as both the have the **View Group** option selected.

Ben's appointments will not appear in the Group Calendar "Arson Hearings" as the **In Group** option is not selected for him; but he will be able to see the Group Calendar

"Arson Hearings" as the **View Group** option <u>is</u> selected for him. Thus, unlike Nicole and Catherine, Ben's appointments will <u>not</u> appear in the Group Calendar "Arson Hearings". However, he will be able to see the Group Calendar. Ben's ability to interact with the Group Calendar is determined by the rights for which he has to Nicole's and Catherine's appointments in the **Accounts/Security** tab.

Justin's and Jenna's appointments will not appear in the "Arson Hearings" Group Calendar, nor will they be able to see the "Arson Hearings" 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.

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 Lookout Software
OfficeCalendar

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

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

To change the port number settings on the OfficeCalendar Server

1. Open the **OfficeCalendar Administration Console;** click on the **Advanced Features** tab; and click on the **Configuration** icon.

2. Under **TCP Port** on the **Configuration** tab, change the **TCP Port Number**, and click **Apply**.
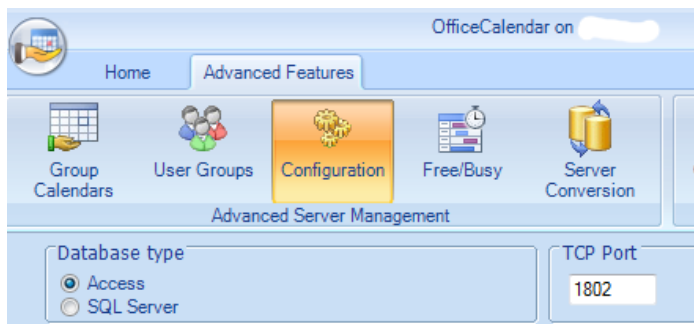
To change the port number setting on the OfficeCalendar Client to correspond with the OfficeCalendar Server

1. Open Microsoft Outlook.

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

3. From the **Configure OfficeCalendar** dialog box click on the **Server Connections** tab, type in the **Port Number**, and click **Save**.
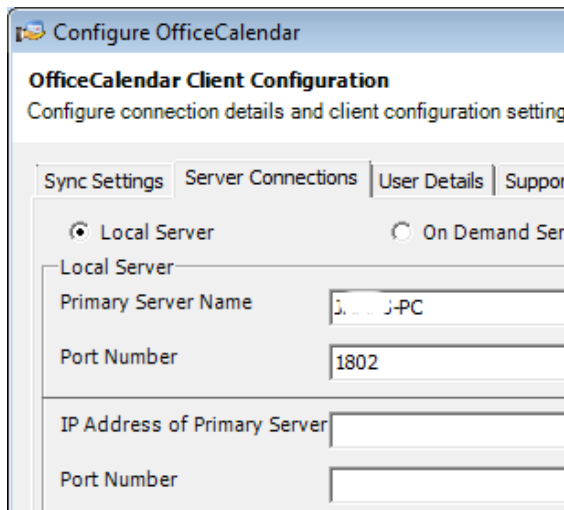
4. In order for the port a number change to take effect, you must close and re-open Microsoft Outlook.

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

Managing your organization's OfficeCalendar Online account

--This section only applies to organizations that have the OfficeCalendar Server installed on their own computers…it does not apply to organizations using OfficeCalendar On Demand --

If you have set up your OfficeCalendar Online account and performed the initial synchronization to your organization's OfficeCalendar Online account through the OfficeCalendar Administration Console (see **"Configuring your organization's OfficeCalendar Online account"**), you can choose to automatically synchronize database information under the OfficeCalendar Online settings in your Administration Console.

To activate automatic database synchronization to OfficeCalendar Online

You can set your OfficeCalendar Server to automatically sync all calendar, contact, and/or task updates to your OfficeCalendar Online account. This way, once a user syncs his/her client, the OfficeCalendar Online account will reflect any changes immediately.

1. Open the **OfficeCalendar Administration Console**; and click on the OfficeCalendar Online icon in the **Home** tab.

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OfficeCalendar

2. Check the box next to **Activate Online Sync.**

3. Click the **Sync Every** drop-down menu and choose a time interval.

4. Choose which Outlook folder items (appointments, contacts, and/or tasks) that all users will sync to their OfficeCalendar Online account for online viewing. Then click **Save.**

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.

By Lookout Software
OfficeCalendar
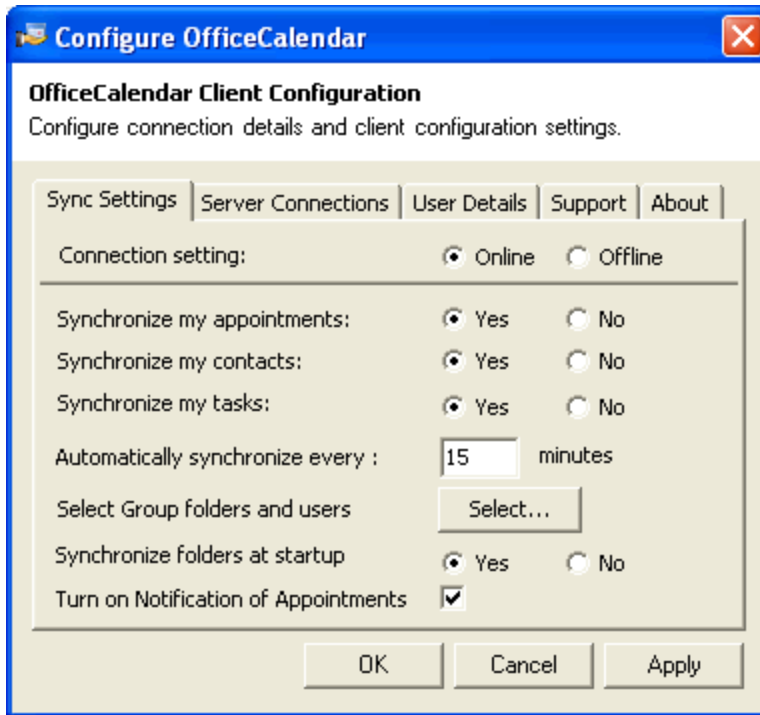
The Sync Settings Tab

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. When users turn their connection setting to **Offline**, the Synchronize OfficeCalendar icon will turn to a red "X" icon to notify users that they are offline and not synchronizing their Outlook information to the OfficeCalendar Server.


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.
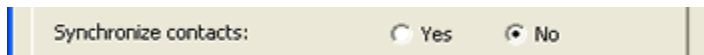
Reference the topic **"Working Offline"** (*page 89*) for more details about this topic.

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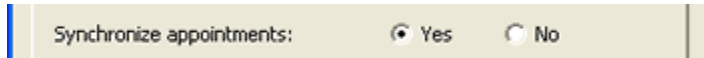
- **Synchronize contacts** – this allows the user to choose whether or not they want to synchronize their Microsoft Outlook contacts with the OfficeCalendar Server. This option exists for several reasons. First, it provides an additional level of security for the end user, ensuring that their Outlook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

- **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.
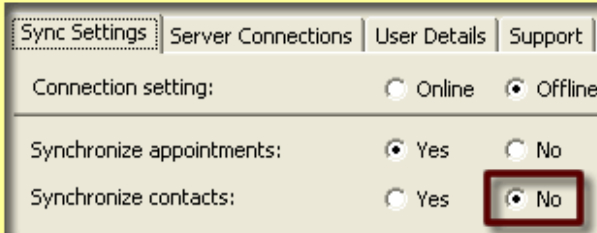
Synchronize tasks:	○ Yes	● No

- **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.

Automatically synchronize every :	15	minutes
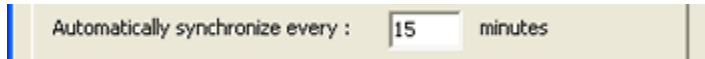
- **Select Group folders and users** – this allows users to choose which Outlook group calendars; and other user/resource calendar, contact and task folders in which they wish to synchronize.

  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 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.

Select Group folders and users	Select...

  Refer to the topic ***"Managing Group Calendars for Group Scheduling"*** (*page 46*) for more information about OfficeCalendar's Outlook group calendars. Refer to the topic ***"Selecting Group Calendars and User Folders"*** *(page 77)* 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.

Synchronize folders at startup	● Yes	○ No

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OfficeCalendar

Reference the topic **"Working Offline"** (*page 89*) for more details about what to do if the OfficeCalendar Server cannot be reached.

- **Turn on Notification of Appointments –** this allows the user to choose whether or not they are notified of appointment additions, modifications and/or deletions within their calendar made by other users. If notifications are turned on, a popup dialog will appear in the user's Outlook window after the synchronization if any appointment modifications were made to the user's calendar by another user since the last synchronization. If the notifications are turned off, the user will not see this popup dialog and will not be notified of any appointment modifications. By default, this option is checked. Reference the topic **"Appointment Notifications and Tracking History"** (page 81) for more details about appointment notifications.

Turn on Notification of Appointments ☑
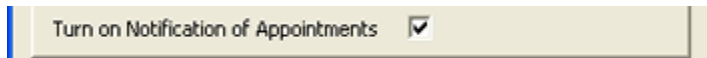
The Server Connections Tab

--If you are using OfficeCalendar On Demand --

If your organization is using OfficeCalendar On Demand (the hosted OfficeCalendar Admin Console) click on the On Demand Server radio button and enter your account name in the the **On Demand Account Name** field; next click the **Test Connection** to ensure you've entered the account name correctly; and click the **Apply** button to save your settings.
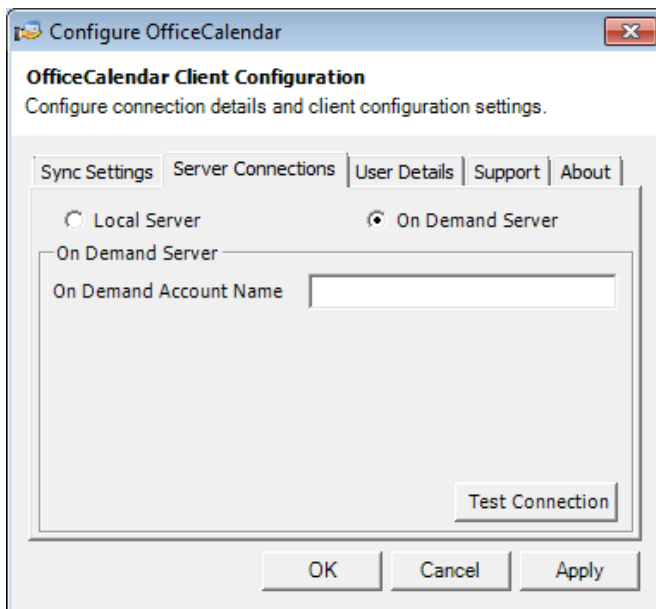
--If you OfficeCalendar Server is installed on computer in your office--

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As previously described, OfficeCalendar is a client/server application, whereby the OfficeCalendar Client communicates with the OfficeCalendar Server. Before the OfficeCalendar Client can communicate with the OfficeCalendar Server, two primary configuration settings must be present: the **Server Name** and the **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:\ocalclient** folder, this info will be automatically configured. Thus, it is likely that a user will never need to do anything with these settings.
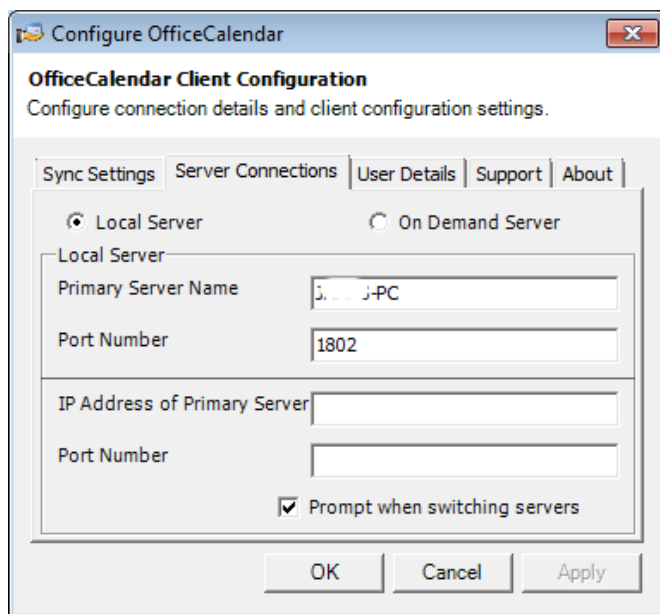

The **IP Address of Primary Server** info was designed to add another level of convenience for mobile notebook users that often work both in-office and out-of-office. While working in-office the user can connect via TCP using the full computer name of the OfficeCalendar Server, and while working out-of-office 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 Microsoft Outlook Data from Remote Users Using OfficeCalendar"* on *page 62* 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.
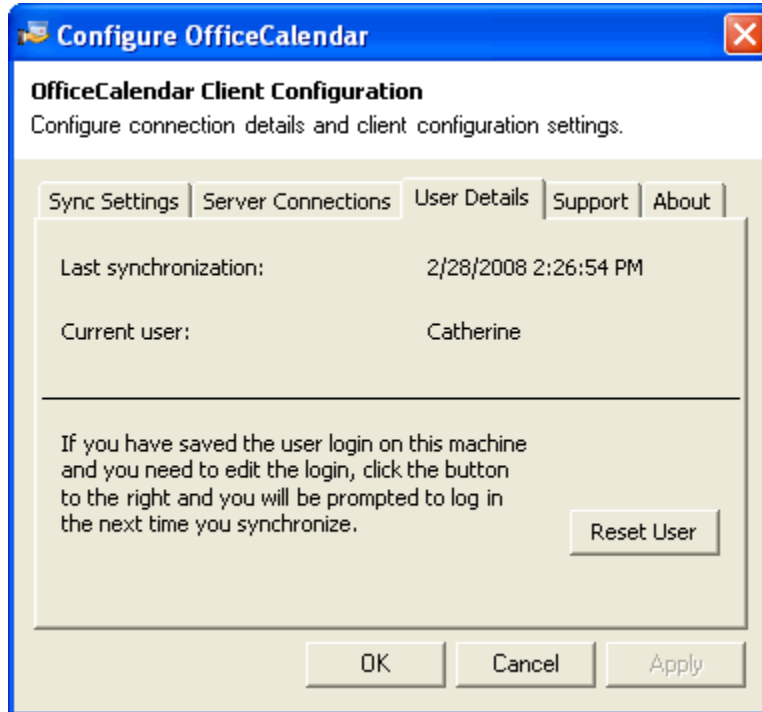
The Support Tab

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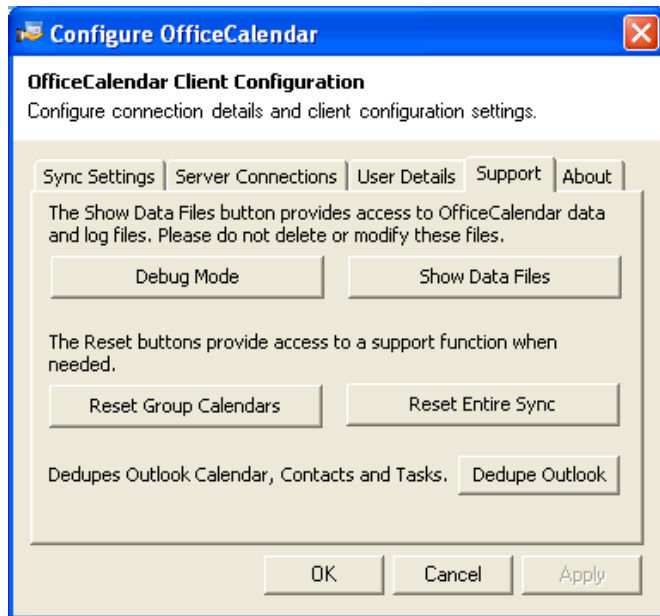
The **Reset Group Calendars** and **Reset Entire Sync** buttons provide access to a support function when needed. This routine should only be run under the direction of an OfficeCalendar staff member.

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.
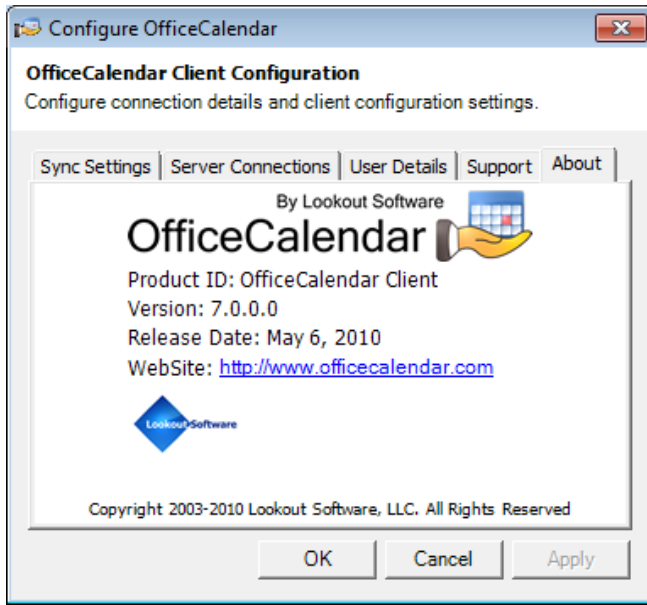
Synchronizing Microsoft Outlook Data from Remote Users Using OfficeCalendar

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.

If your organization has remote users (user that do not work in the central office), we recommend **OfficeCalendar On Demand** as the best solution. However, you can still sync OfficeCalendar clients over the internet, but it will require some additional knowledge and tools to do so.

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 Microsoft Outlook Data from Remote Users Using OfficeCalendar," available online at http://officecalendar.crmdesk.com/answer.aspx?id=4&back=search.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.
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.
7. Click **Apply**, and then click **OK** to close the **Configure OfficeCalendar** dialog box.
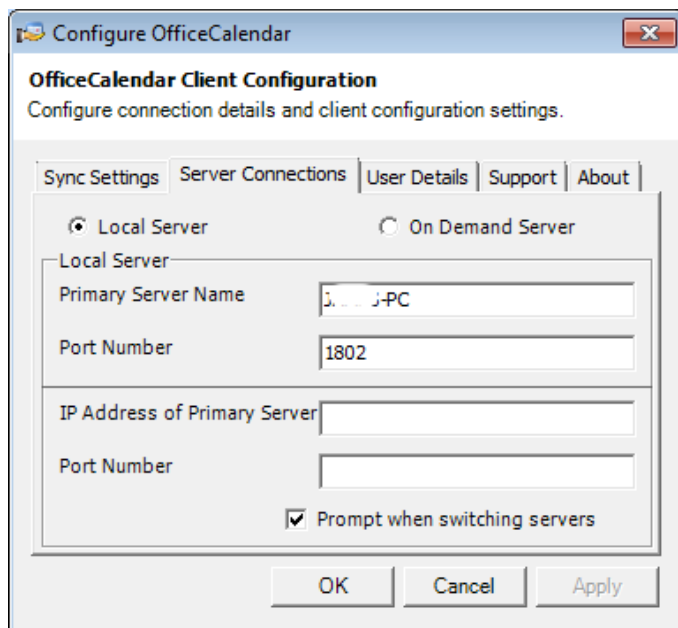
As long as Outlook is open on your computer, it will synchronize with your main office every 15 minutes, or however often your personal **"Automatically synchronize every"** duration preference is set to. You can also get instant updates by clicking on the **Synchronize OfficeCalendar** icon on your Outlook toolbar.

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OfficeCalendar

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 menu option; 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; and the addition of shared mail folders under your Inbox folder.
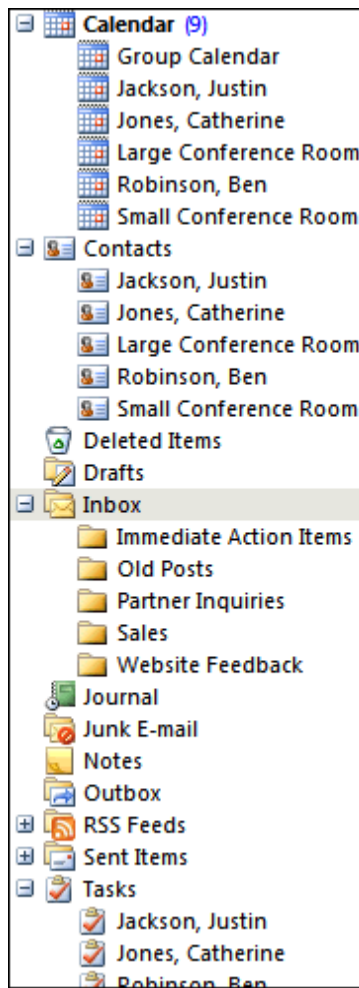
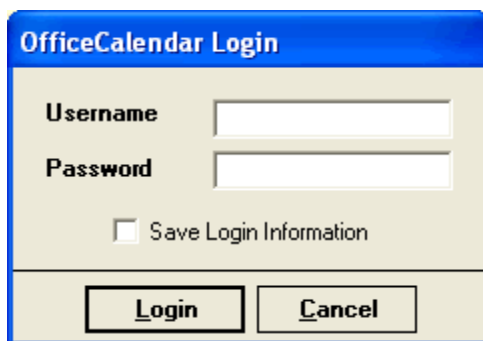## *Logging into OfficeCalendar from Microsoft Outlook*

The first time you open Microsoft Outlook after installing OfficeCalendar:

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

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

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

4. Click the **Login** button.

Configuring Outlook email folder sharing

OfficeCalendar includes the ability to share your Outlook email folders with other OfficeCalendar users, using Outlook's Send/Receive synchronization process.
The **Email Sharing for OfficeCalendar Configuration** dialog contains configuration data about shared email folders and various settings for how OfficeCalendar processes shared Outlook email folder data.
From the **Email Sharing for OfficeCalendar Configuration** dialog box you can:

✓ View the Microsoft Outlook email folders you are sharing with other Microsoft Outlook users (referred to as **My Shares**).
✓ View the Microsoft Outlook email folders others users are sharing with you (referred to as **User Shares**).
✓ Edit and/or delete shares with other users.
✓ Modify or change OfficeCalendar email synchronization settings.

To open the **Email Sharing for OfficeCalendar Configuration** dialog box:

1. Click on the OfficeCalendar drop-down menu in your Microsoft Outlook toolbar.
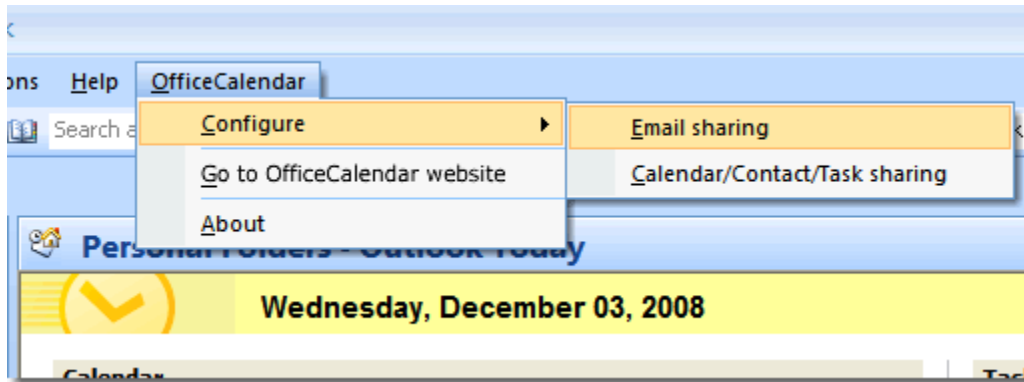
2. Choose **Configure** from the drop-down menu options, then select **Email Sharing**.

My Shares Tab

The **My Shares** tab is the first tab you'll see when opening the in the **Email Sharing for OfficeCalendar Configuration** dialog box, and this tab contains data about the Microsoft Outlook email folders in which you share with other users. The **My Shares** tab also contains several functions that allow you create new shared Outlook email folders as well as functions that allow you edit the properties of your existing shared Outlook email folders.

Sharing Outlook email folders from the My Shares tab

To share an Outlook email folder from **My Shares** tab:

1. From the **My Shares** tab; select the Outlook email folder you wish to share from the Outlook email folder list on the left.
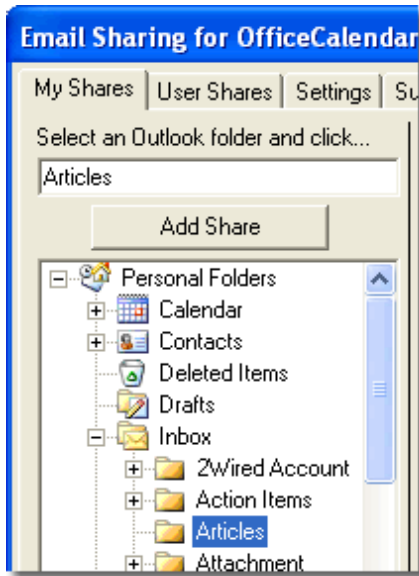
2. Next, click the **Add Share** button above the displayed Outlook folder list.

3. From the **Add Share** dialog box, type in the name of the person you wish to share the selected folder with inside the **Full Name** text box; then type in the email address of the person you wish to share the selected folder with inside the **E-mail** text box; then select the access rights you wish to grant to the person you are sharing the selected folder with using the corresponding check boxes for **Write Access** and **Delete Access**; and click **Save**.
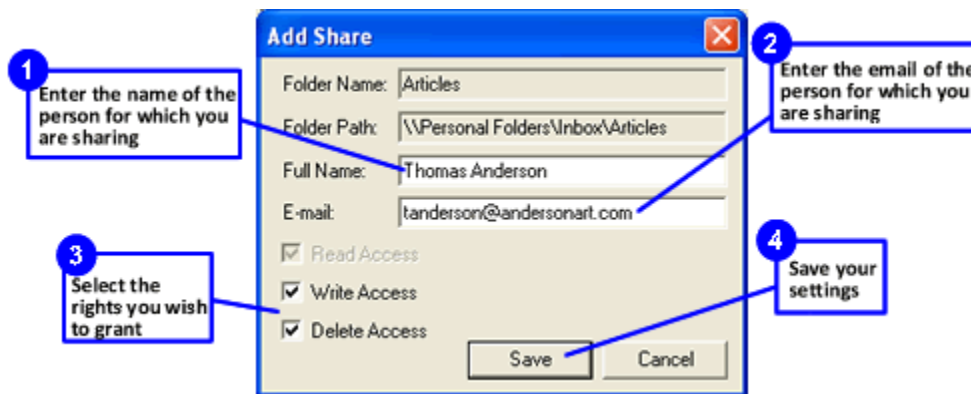
Editing one or more of your Outlook shares

To edit one or more of your Outlook shares:
1. From the **My Shares** tab, select a share from the list of **current shares** list; and click the **Edit Share** button.

By Lookout Software
OfficeCalendar

2. From the **Edit Share** dialog box, change the **Full Name** of the person you are sharing folder data with and/or the person's access right you wish to grant; and click **Save**.
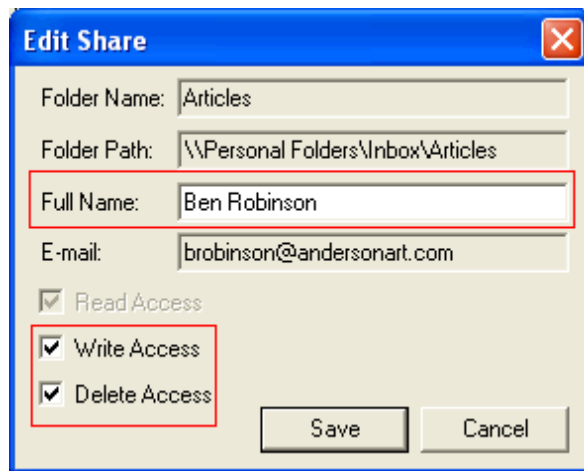
Deleting one or more of your Outlook shares

To delete one of your existing Outlook shares:

1. Highlight the user share you wish to delete; and click the **Delete Share** button.

2. Follow any further on-screen prompts.

User Shares Tab

The **User Shares** tab allows you to view and/or delete the Microsoft Outlook folders that other users are currently sharing with you (referred to as **User Shares**).

Viewing User Shares

To view your current User Shares:

1. Open Microsoft Outlook if it is not already open.

2. Click on the OfficeCalendar drop-down menu; and select **Configure** then **Email Sharing**.

3. Next; click on the **User Shares** tab.

Deleting a User Share

To delete a User Share:

1. Click on the **User Shares** tab.

2. Highlight the User Share you wish to delete; and click on the **Delete Share** button.

3. Follow any further on-screen prompts.

Settings Tab
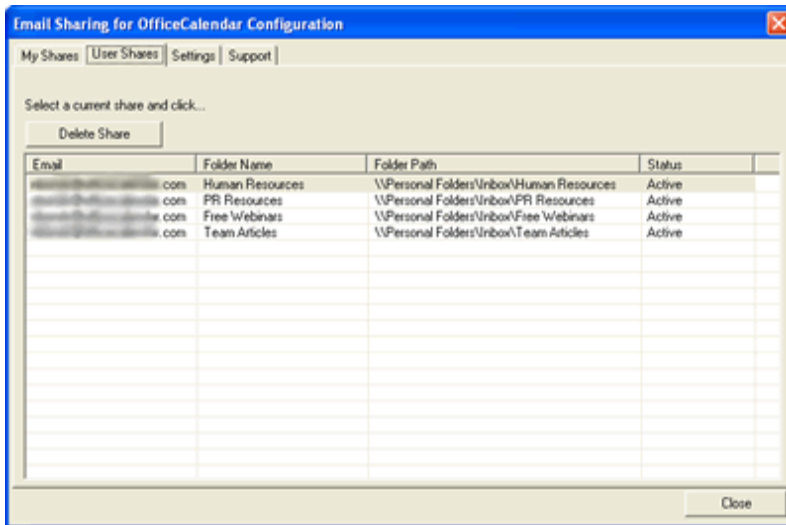
The **Email Sharing for OfficeCalendar Configuration** dialog's **Settings** tab contains the following settings:

- Send Updates
- Maximum size of synchronization email

Turn Off/On automatic updates through Send/Receive

By default, OfficeCalendar is set to send, receive, and process updates for shared Outlook email folders each time you send and receive email from Microsoft Outlook. However you can turn off this automated update function and set OfficeCalendar to only send updates when you manually click on the OfficeCalendar Sync button on the OfficeCalendar toolbar (or if OfficeCalendar is set to automatically synchronize on its own, it will send shared email folder updates upon synchronization).

To turn off automated synchronization of shared Outlook email folder updates using Outlook's Send/Receive function:

1. Open Microsoft Outlook if it is not already open.

2. Click on the **OfficeCalendar** menu; and select **Configure** followed by **Email Sharing**.

3. Click on the **Settings** tab.

4. Click on the **Send Updates** dropdown option; and select **only when I click on "Sync" button**. Then **Close** the **Email Sharing for OfficeCalendar Configuration** dialog box.
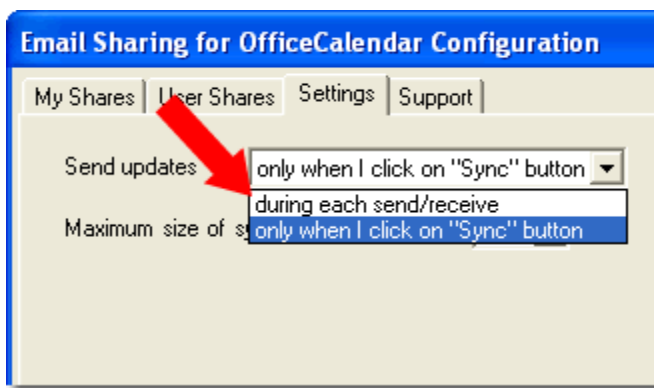
Change the maximum size of synchronization emails

OfficeCalendar gathers data from shared Outlook email folders; and attaches the data to specially encoded emails for processing between two or more Outlook installations.

By default, OfficeCalendar will splits this data up into multiple emails so that it will not send any emails that contain an attachment larger than 5MB. This done because many email account providers limit the size of attachments that can be sent or received; and 5MB appears to be the average size limitation. Never-the-less, 5MB is a general average, and some providers will allow larger attachments while others have more stringent size limitations.

If you experience an issue with sending and/or receiving OfficeCalendar synchronization emails to limitations of your emails provider with regards to attachment size; or a user you are sharing an Outlook email folder with is unable to receive your shared folder synchronization data; you can reduce the size of attachments OfficeCalendar will use to send synchronization data.

If you do not experience any issues with emails file size limitation; it is highly recommended that you leave the setting at its default unless instructed to change it by the OfficeCalendar support team.
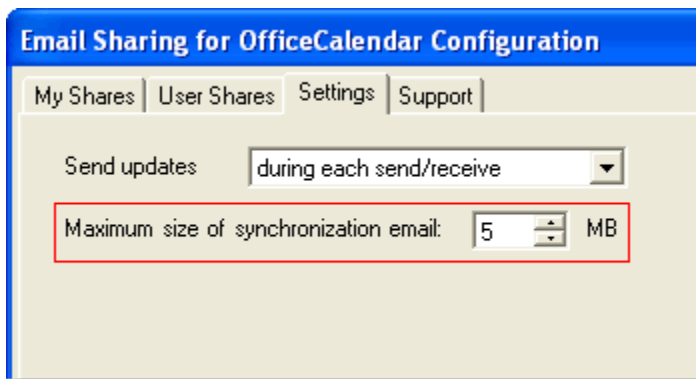
"Sharing Microsoft Outlook Calendar and Contacts without Exchange Server"
Copyright Lookout Software, LLC 2003 – 2011. All rights reserved. Microsoft, Outlook, and Exchange Server are trademarks or registered trademarks of Microsoft Corporation. Last update December 27, 2010.
http://www.officecalendar.com

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To change the maximum size of synchronization emails:

1. Open Microsoft Outlook if it is not already open.

2. Click on the OfficeCalendar menu; and select **Configure** followed by **Email Sharing**.

3. Click on the **Settings** tab.

4. Set the maximum size of synchronization email attachments using the **Maximum size of synchronization email** toggle box. Then **Close** the **Email Sharing for OfficeCalendar Configuration** dialog box.

Support Tab

The **Email Sharing for OfficeCalendar Configuration's Support** tab provides access to support and diagnostic tools. It is recommended that you access these functions only upon the instruction of the OfficeCalendar support team.
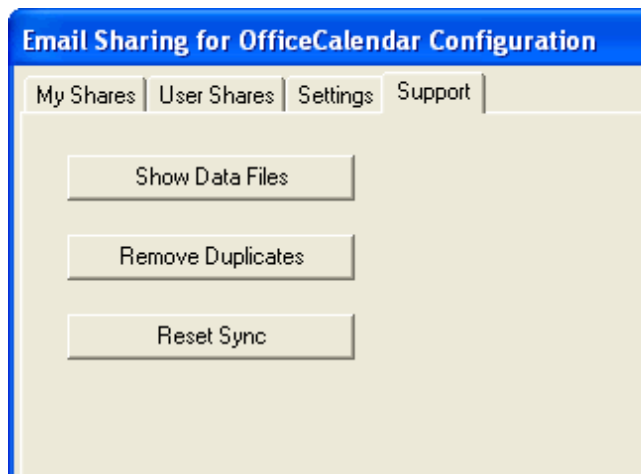
Using Outlook email folder sharing

Sharing Outlook email folders via email synchronization

After you add a share, an invitation is sent to the user to accept or reject your Outlook email folder share request. Once an invitation to share an Outlook email folder has been accepted; the status of the share is then updated in the **Email Shar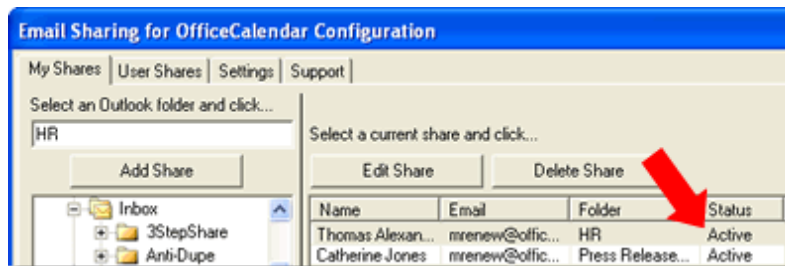ing for OfficeCalendar Configuration** dialog box to "Active" in either the **My Shares** tab and/or **User Shares** tab.

The "Active" status then tells OfficeCalendar to begin the processing of sharing and synchronizing the shared Outlook email folder's data via email, all of which happens behind the scenes without any user intervention (by default).

The processing times for the very first synchronization of a share takes the longest since it gathers all data in the shared folder for processing, and sends it to the person for which you are sharing the data. The time of the synchronization depends on the Outlook email folder you are sharing, and how much data is contained within the folder.

After the first synchronization, however, OfficeCalendar only processes changes that have occurred between the shared email folders since the last synchronization, and thus subsequent shared email folder synchronization processing times are much quicker. However, if you are sharing email folders with large attachments this may not be the case.

For most users, Outlook's performance will not be effected as the algorithm for gathering data for synchronization has been designed to be efficient, being mindful the speed at which the processing occurs, while keeping plenty of system resources available for Outlook to continue working as normal while the processing is taking place.

Receiving an invitation to share an Outlook email folder

When an Outlook user shares an Outlook email folder with another user via OfficeCalendar; the user in which you specified to share the email folder with will first receive an invitation to share the selected email folder, and then must accept the invitation and tell OfficeCalendar where they would like the shared email folder will be stored within their Microsoft Outlook folder structure.

Accepting an invitation to share a Microsoft Outlook email folder

1. To accept an invitation to share an Outlook email folder, after carefully reviewing the name and email address of the inviter, click the **Accept** button.

2. Next, from the **Create New Folder** dialog box, select the default location and name for the shared folder **or** create a custom name and location for the shared folder; and click **OK**.
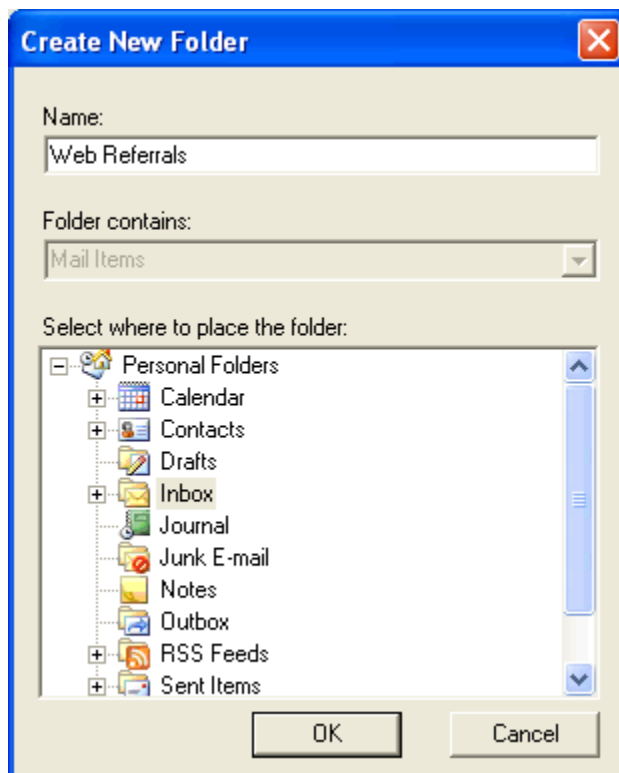
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OfficeCalendar

The **Shared Folder Successfully Added** dialog will appear; please read it to understand what will happen next…
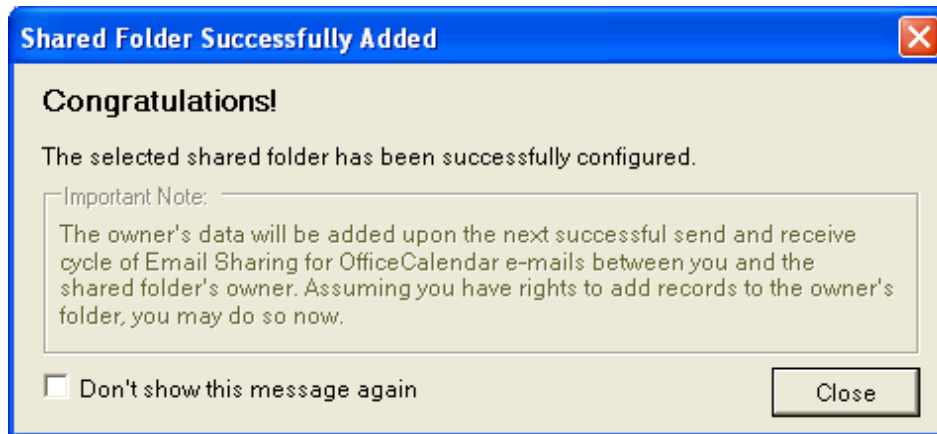
Rejecting an invitation to share an Outlook email folder

If you receive an invitation to share an Outlook email folder, be sure to verify the information (Name and Email Address of the Inviter) in the invitation before accepting. If you do not know or recognize the person inviting you to share an Outlook folder then simply click the **Reject** button in the **Invitation to share Outlook folder** dialog box.

How do you know if an invitation to share an Outlook folder has been rejected?

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If an invitation to share an Outlook email folder has been rejected, the status of the share is updated in either **My Shares** or **User Shares** tab within the **Email Sharing for OfficeCalendar Configuration** dialog box.
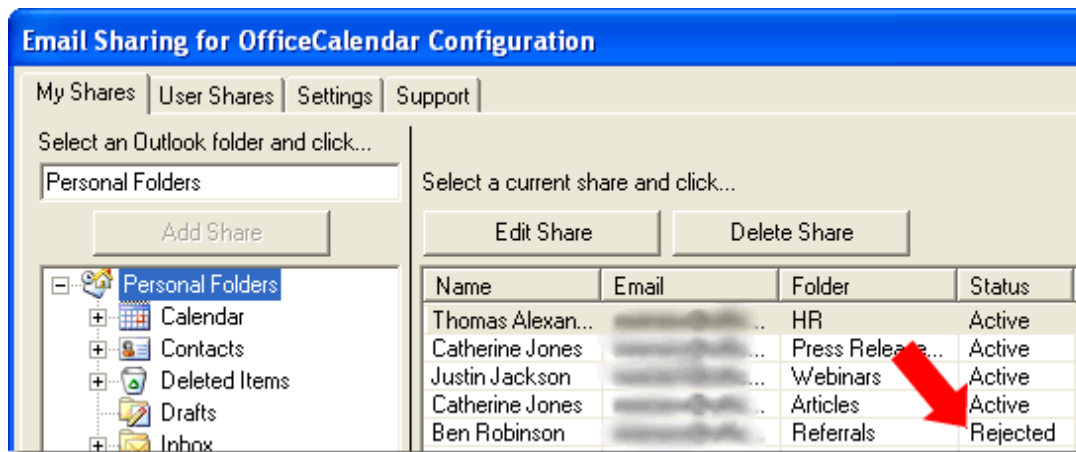
You can later delete the share and re-invite the same user at any time and as often as you wish.

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.

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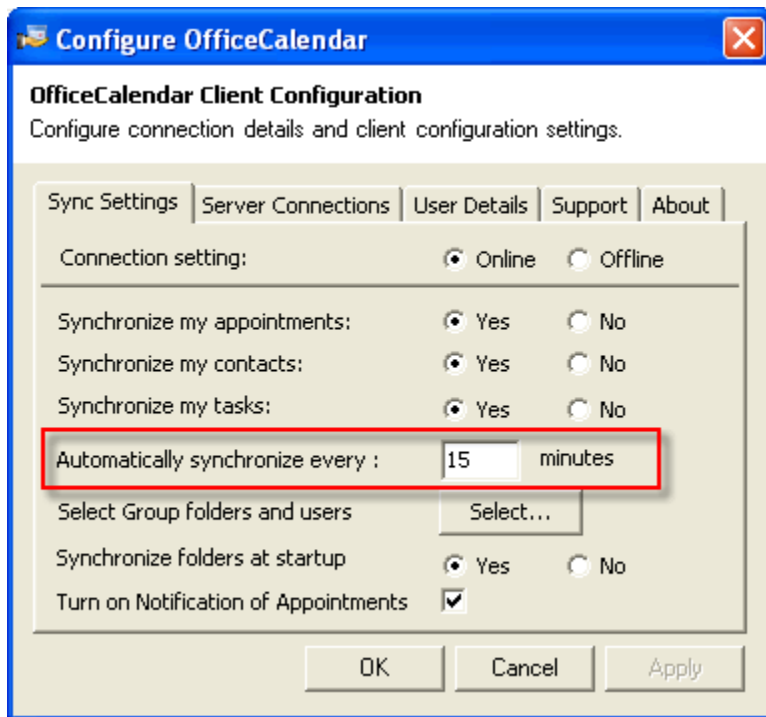
It is not recommended that you set the automatic synchronization time below 15 minutes because the lower value you set in this field will increase the number of requests being made across your local area network, which could potentially cause slower performance of other network applications.

Setting how often you send and receive your Outlook's Shared Email Information

Your OfficeCalendar Outlook add-on Client will synchronize to send and receive updated Outlook shared email information each time your Outlook is set to Send/Receive with your mail server. You can change the time interval that OfficeCalendar shares your email information by changing your Outlook's Send/Recieve settings.

To change the frequency of your OfficeCalendar email share by the Outlook Send/Receive settings:
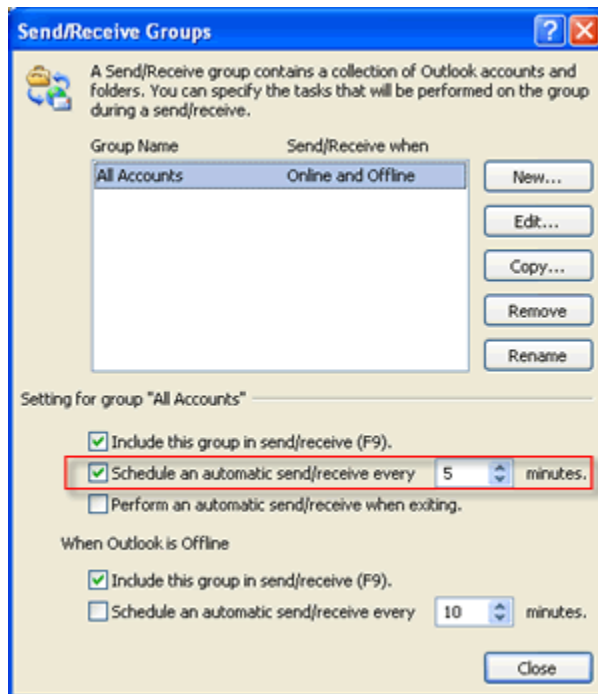
1. Open Microsoft Outlook on your computer.

2. Click **Tools**, then **Send/Receive.**

3. From the Send/Receive drop menu, select **Send/Receive Settings** then **Define Send/Receive Groups**.

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4. In the **Send/Receive Groups** dialog box, change the time interval field in the field **Schedule an automatic send/receive every () minutes**. Then click **Close**.

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.

By default, OfficeCalendar includes the default Group Calendar in your list of group calendars available; but the option to view it is unchecked by default during installation of the OfficeCalendar Client. To show the default Group Calendar, click the check box next to "Group Calendar" and it will appear in your Calendar sub-folders after the next synchronization.

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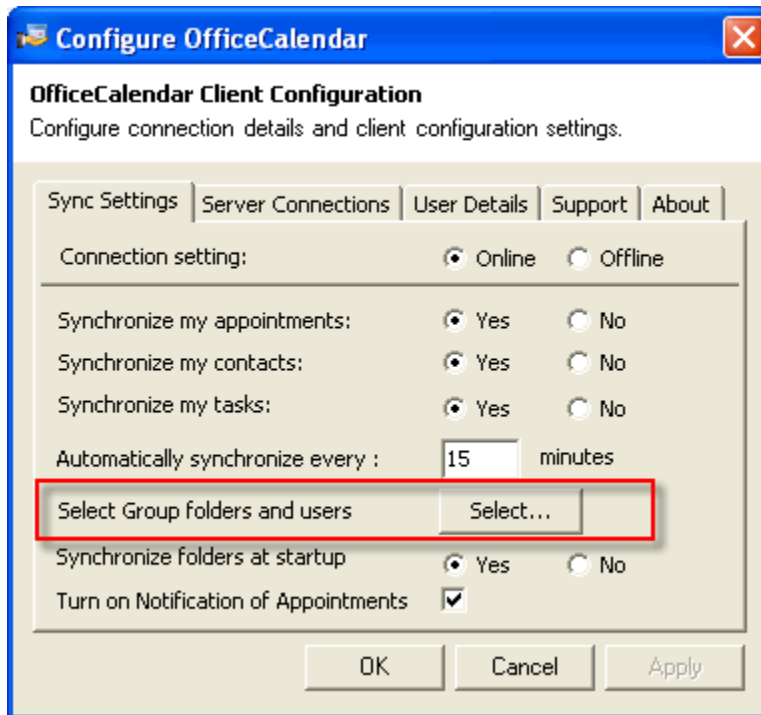
3. Select the **Group Calendars** tab. Check the boxes next to which group calendars you want to see next time you synchronize; de-select those you do not wish to see in your Outlook folder list.

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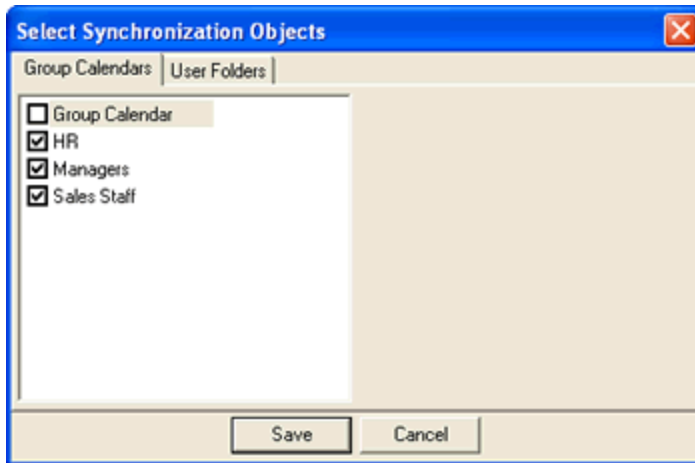
4. Click the **User Folders** tab. Check the boxes corresponding to other users'
   Outlook data folders you want to see next time you synchronize; de-select the
   folders you do not wish to see within your Outlook folder list.
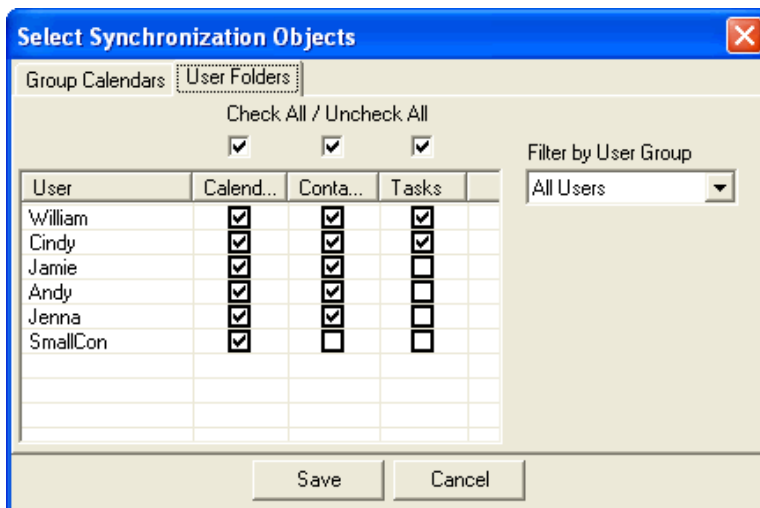
5. Click the **Save** button, then **OK** to exit the **Configure OfficeCalendar** dialog
   box.
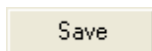
By selecting which group calendar folders and other users' Outlook folders you want
to synchronize, you can keep your personal Outlook folder list organized and free of
unnecessary information. This will not only improve navigation, but increases
synchronization speed if OfficeCalendar does not have to update all available group
calendar folders and other user folders while synchronizing with Microsoft Outlook.

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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.
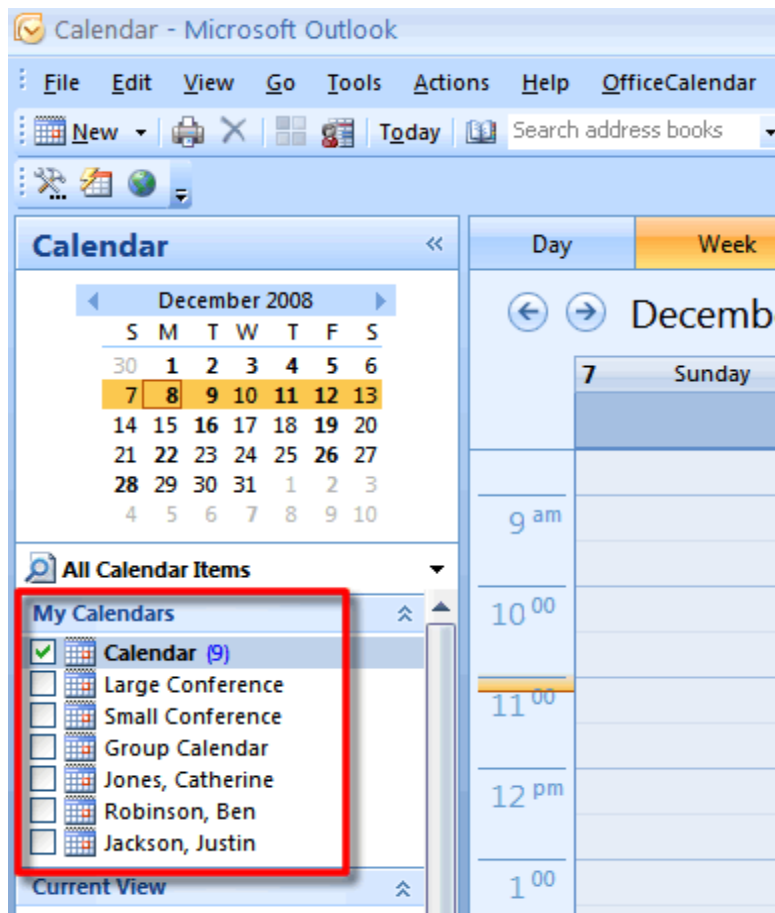
If one or more of your co-worker's calendar does not appear in your list of Outlook calendars once you have performed a few synchronizations, one of the following scenarios may apply:

▪ 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.

Appointment Notifications and Tracking History

OfficeCalendar offers the ability to receive appointment notifications within your Outlook window when other users make changes to your Outlook calendar. The appointment notification window only appears after your OfficeCalendar synchronizes and someone has made additions are modifications to your calendar. There are three things that can trigger an appointment notification:

- Someone adds one or more new appointments to your calendar.
- Someone modifies an existing appointment on your calendar.
- Someone deletes an appointment from your calendar.
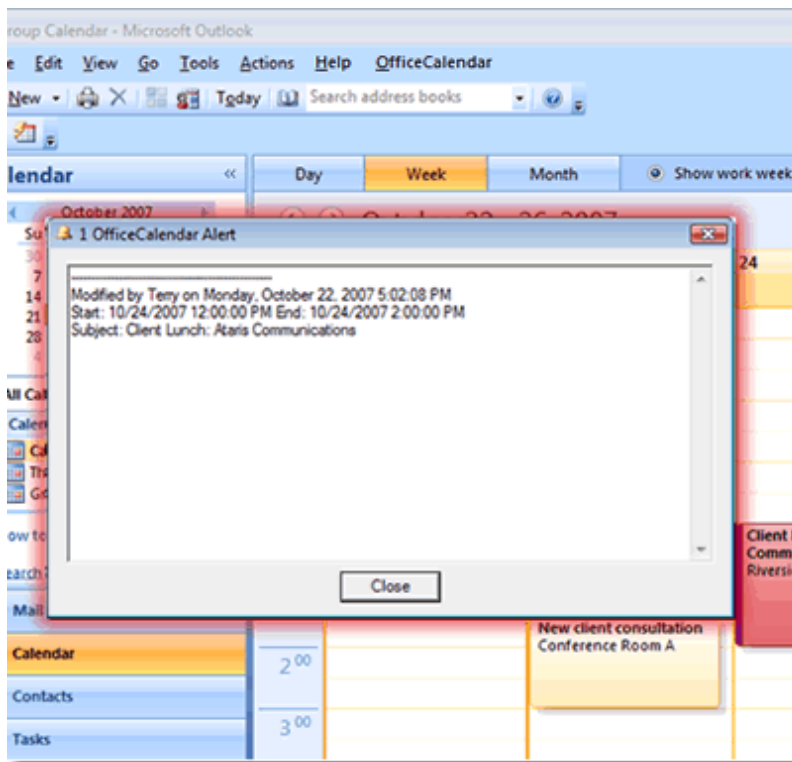
If multiple changes or additions are made to your calendar between syncs, all changes are condensed into one notification window.

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To turn appointment notifications on or off, see **"Turn on notification of appointments"** *(page 58)*.
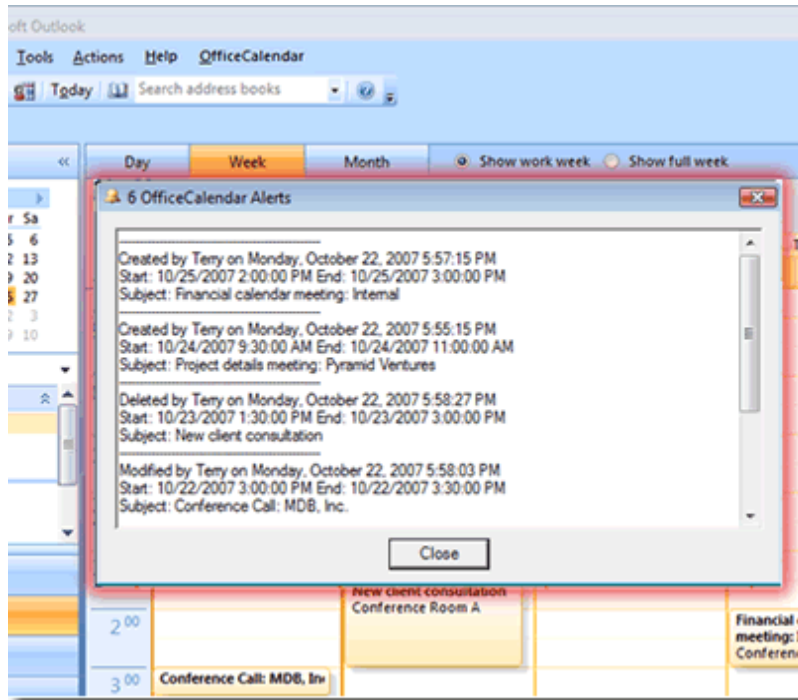
Viewing Appointment Notifications Tracking History

After you close the appointment notifications window, you can go back and view an appointment's tracking history. All changes and modifications to an appointment are logged within each of your appointments for reference.

To view an appointment's tracking history:

1. Open the appointment that you would like to view the history for.

2. Click the button labeled "History" in the appointment's toolbars area.

3. A pop-up window with the appointment's tracking history appears.
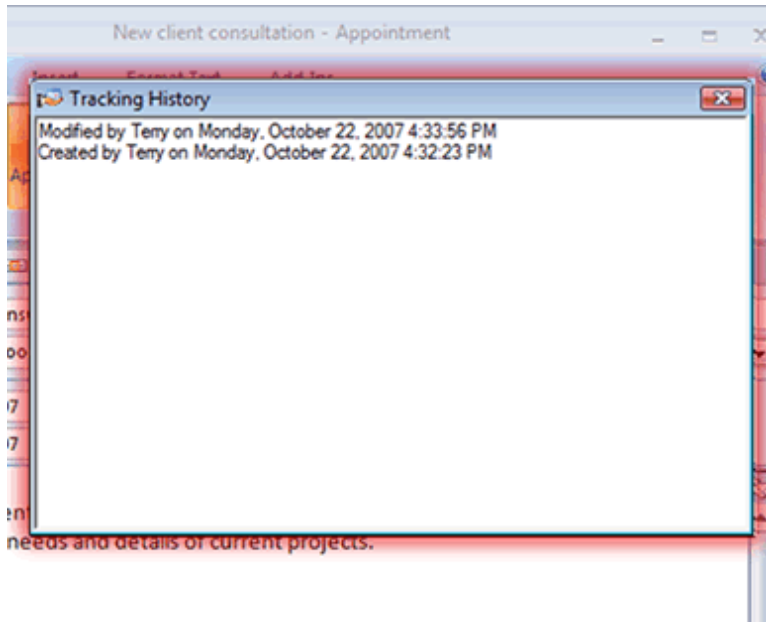
Making an Appointment Private

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 **Options** section.
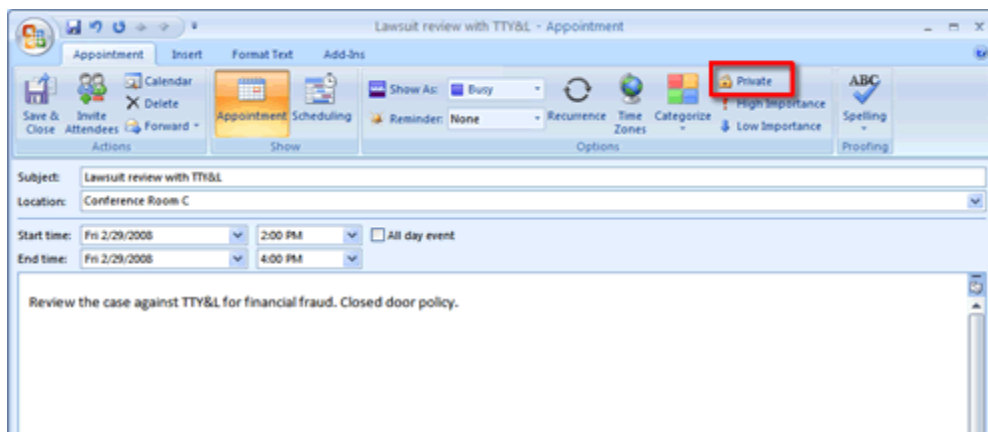
3. Click **Save and Close**.

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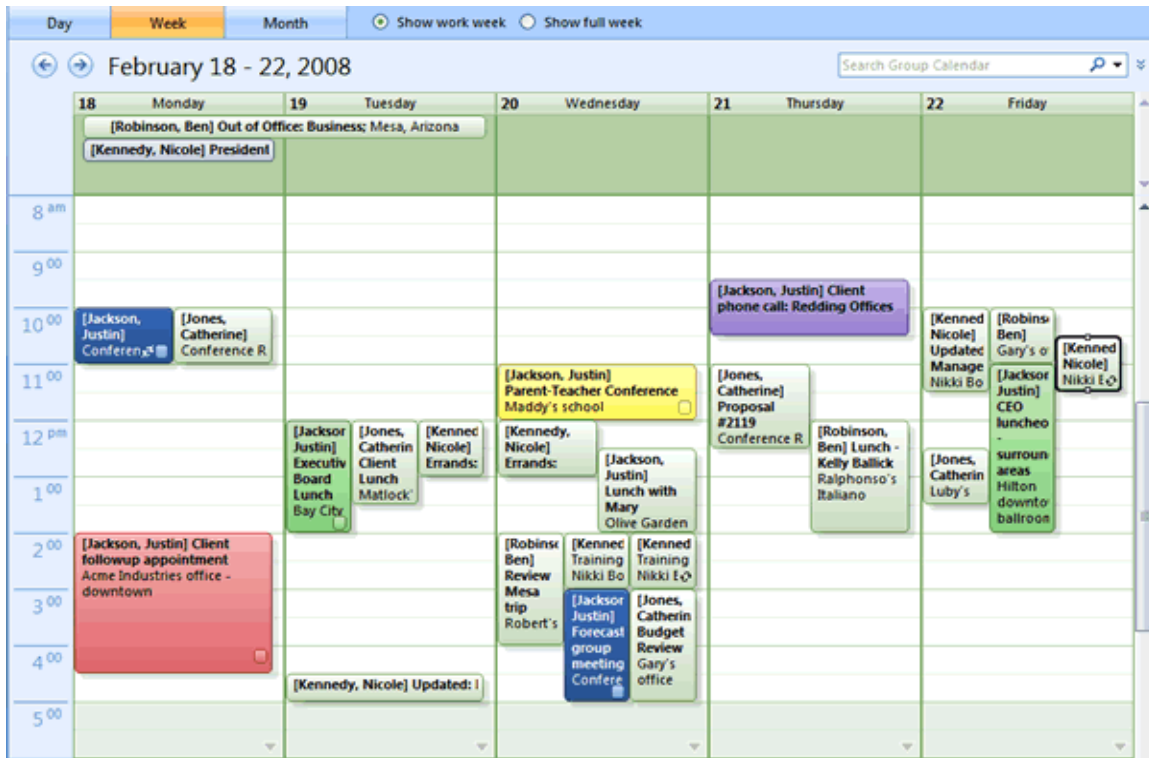
All OfficeCalendar group calendars are editable, meaning appointments can be created, edited and deleted to/from group calendar folders. The same security rights assigned to you regarding access to other users' Outlook folders also apply to group calendar folders. With the proper security rights, you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

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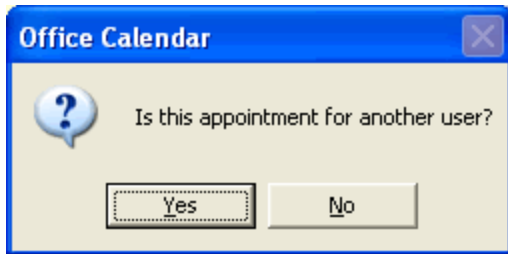
If you select **No**, the appointment will appear in the group calendar with only your name next to the description. If you select **Yes**, the **Select User/s** dialog box will follow, allowing you to select one or more of users and/or resources to associate with the new appointment. If you choose to 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:

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 and Tasks with OfficeCalendar

Viewing, entering, editing, and deleting contact and task 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 and task data with, is that you must navigate to the specified user's Contacts or Tasks sub-folder. OfficeCalendar will automatically create sub-folders for each of your co-workers under your main Outlook Contacts and Tasks folders as shown in the illustrations below.

By Lookout Software

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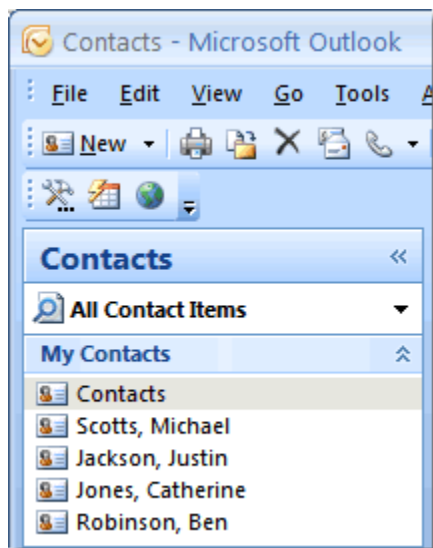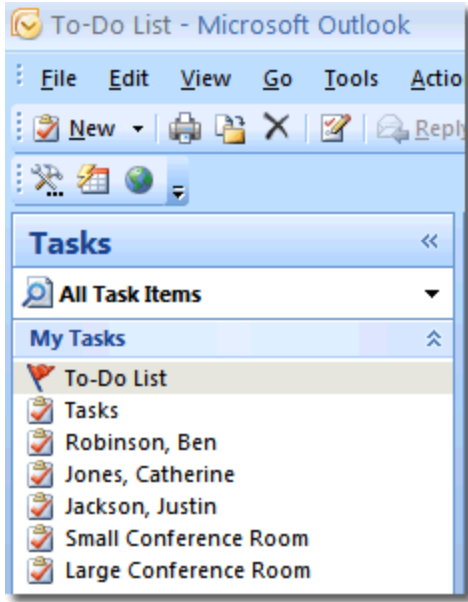
If one of your co-worker's Contacts or Tasks folder does not appear in your list of Contacts or Tasks folders in Microsoft Outlook after you have performed your first few synchronizations, one of the following scenarios may apply:

- The user has not executed their first synchronization yet.

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

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

Making a Contact or Task Private

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

To create a private contact or task:

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

2. Select the **Private** button in the **Options** section.

3. Click **Save and Close**.

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OfficeCalendar

Your private contacts and tasks are not viewable by anyone, even by those that have permission to share your Outlook contacts and/or 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 Microsoft Outlook Data from Remote Users Using OfficeCalendar"* on *page 62* 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).
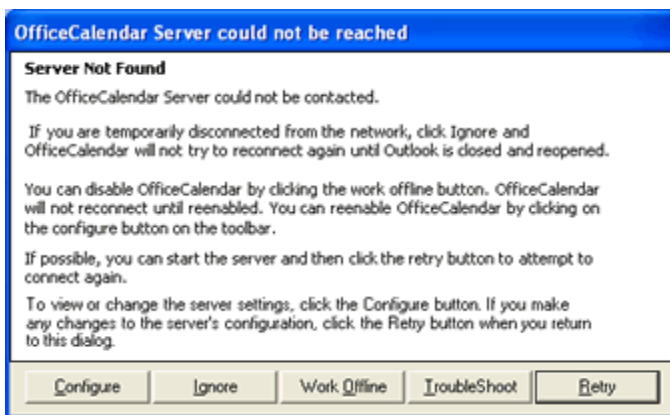
When users turn their connection setting to Offline, the Synchronize OfficeCalendar Icon will turn to a red "X" icon to notify users that they are working offline and not synchronizing their Outlook information to the OfficeCalendar Server.

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.
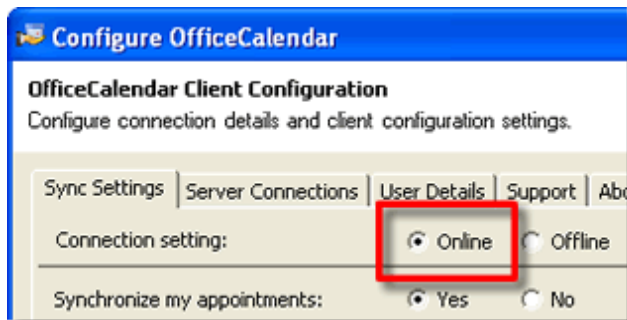
To re-enable OfficeCalendar to work online:

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 <u>not</u> 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 a 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 Administration Console**, and click on the **Advanced Features** tab; then click on the **Configuration** icon.

3. From the **Database type** group box, select the **SQL Server** option radio button.

4. 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).

5. 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.

6. 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.
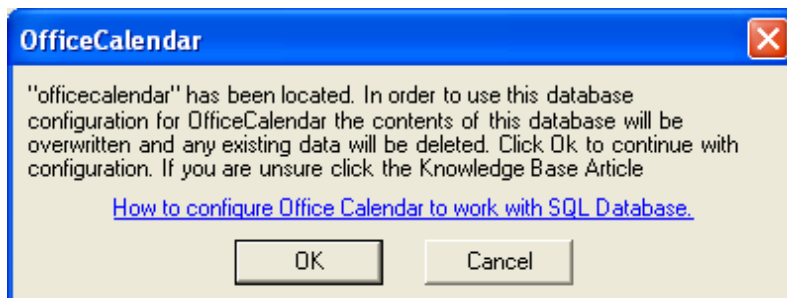
8. Next, the dialog box below will appear; click **Yes** to save the settings.
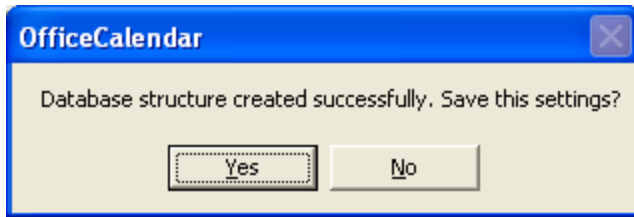
9. Finally, the message below will appear. Click **OK** to confirm the restarting of your OfficeCalendar Server. Please wait several minutes for OfficeCalendar to perform a complete restart.
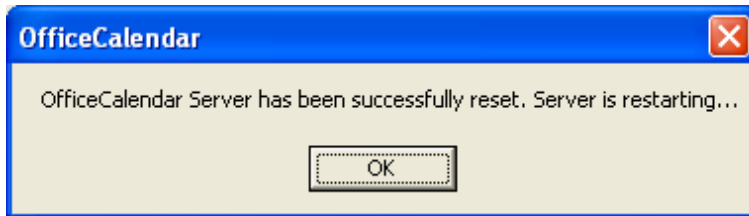
Using OfficeCalendar's Internet Free/Busy Server for Microsoft Outlook

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 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 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.

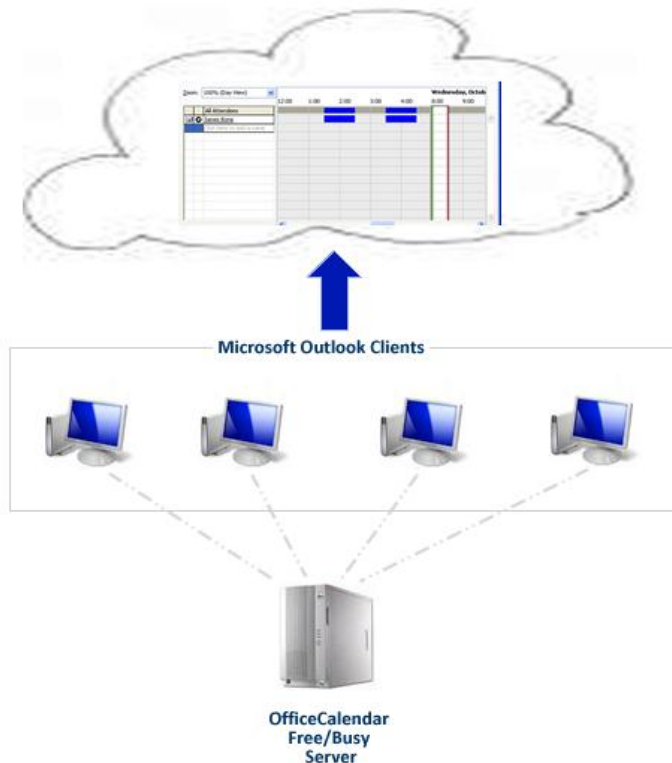*Outlook Automatically Publishes and Retrieves Free/Busy Information*

"Sharing Microsoft Outlook Calendar and Contacts without Exchange Server"
Copyright Lookout Software, LLC 2003 – 2011. All rights reserved. Microsoft, Outlook, and Exchange Server are trademarks or registered trademarks of Microsoft Corporation. Last update December 27, 2010.
http://www.officecalendar.com

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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.

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.

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OfficeCalendar

- 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 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 Administration Console, click on the **Advanced Features** tab; and click **Free/Busy** icon.

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*.

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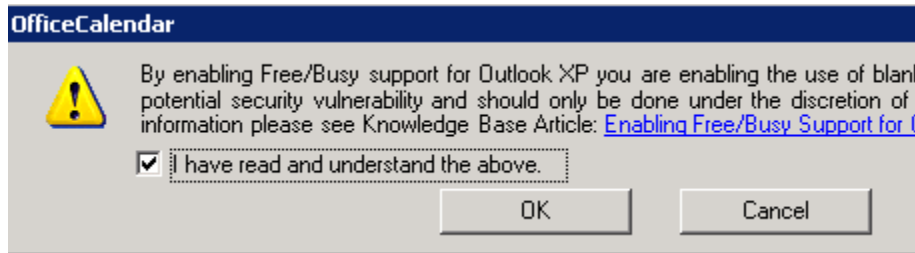
6. Once you've ensured that settings in *Steps 3* and *4* are correct; click on the **Create** button.

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**.

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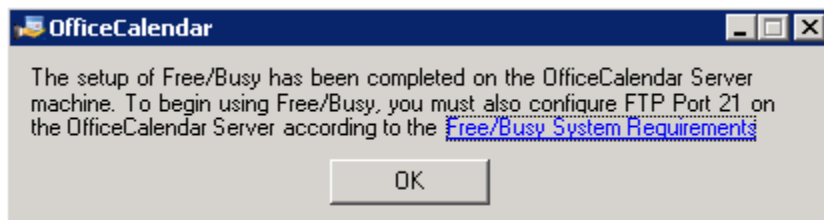
7. Click the **Turn On Outlook Free/Busy** check box to start the OfficeCalendar Free/Busy Server.

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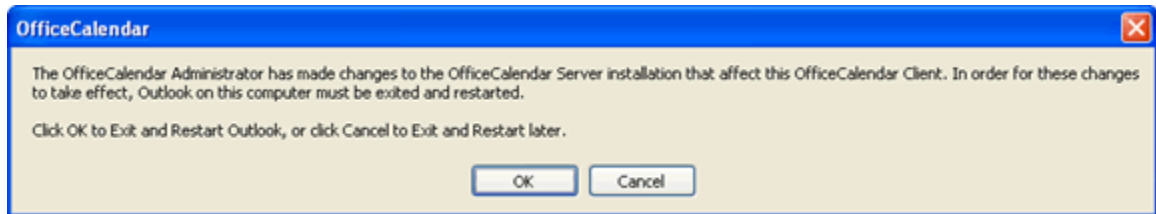
Once Outlook is restarted, the Outlook client is fully configured to send and received Internet Free/Busy files. Please note, it may take several hours before all user data is visible as all users must go through this process before their Free/Busy data is published and retrieved by others.

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**.
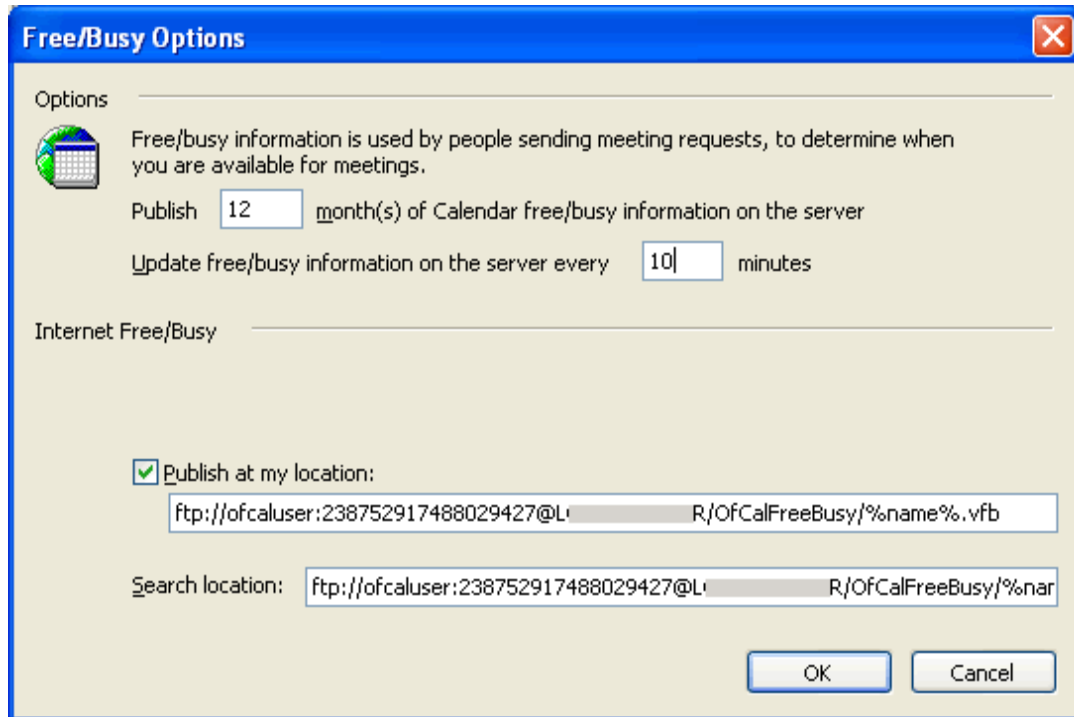
How to Plan a Meeting Using Internet Free/Busy Information

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.

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.aspx, or call/email us at:

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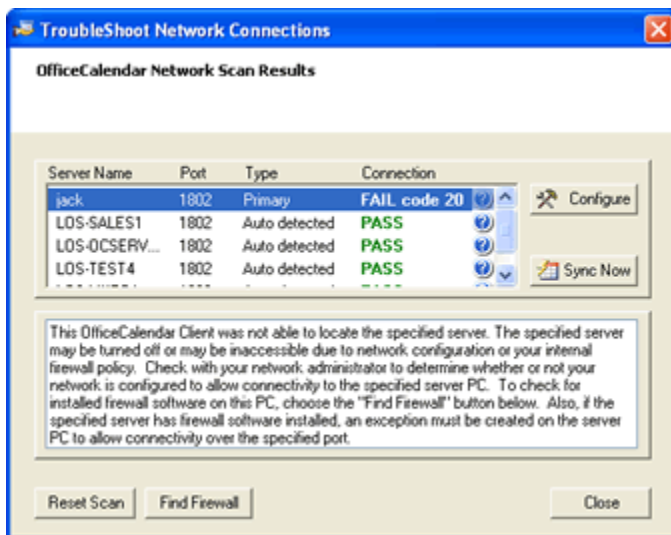sales@officecalendar.com

Getting Help with OfficeCalendar

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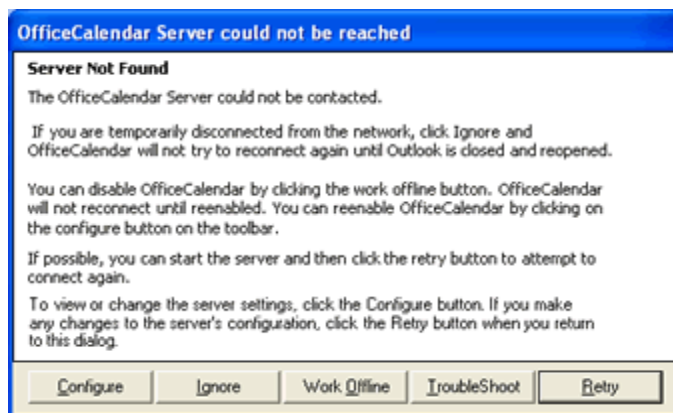
Click **Troubleshoot** to scan and test the connection between the OfficeCalendar Client and Server.
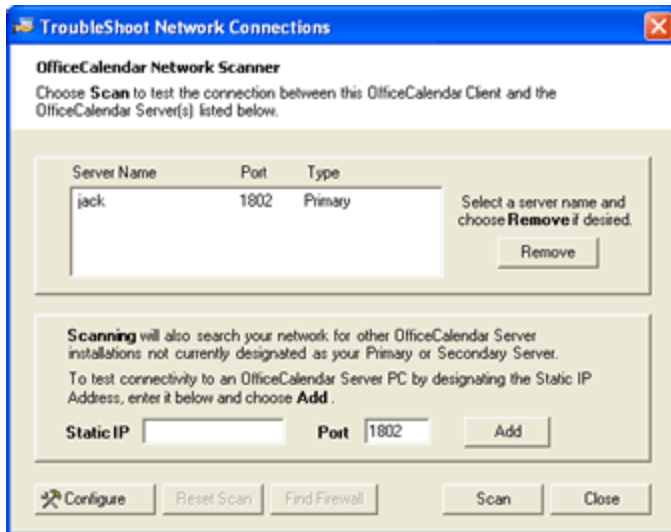
After testing the connection between your OfficeCalendar Client and Server, you may also choose to scan for installed firewall software by clicking on **Find Firewall**. Firewalls can block connectivity between your OfficeCalendar Client and Server, in which case an exception must be created.

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

Removing the OfficeCalendar Client from Outlook

To remove the OfficeCalendar Client from Outlook:

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

Removing the OfficeCalendar Server

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

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