Mirapoint ConnectR 5.x and Microsoft Outlook 2010 User's Guide

SYSTEM REQUIREMENTS 2
Ensuring That You Have the Latest Windows Updates 2
INSTALLING THE CONNECTR ADD-IN 2
CONFIGURING CONNECTR 3
Displaying the ConnectR Tab 3
Setting Up Your Personal Account 3
Setting Up Users to Synchronize 4
CONFIGURING ACCESS PRIVILEGES 5
Granting Others Access to Your Calendar 5
Denying People Access to Your Calendar 5
VIEWING CALENDARS 6
Viewing Your Calendar 6
Using the Date Navigator 6
Viewing Another Person's Calendar 6
SCHEDULING, MODIFYING AND CANCELING ACTIVITIES 8
Scheduling a Meeting 8
Scheduling a Recurring Meeting 9
Scheduling an All-Day Event 9
Changing an Appointment, Event or Meeting 10
Canceling a Meeting or All-Day Event 12
Making an Appointment or Meeting Private 12
REPLYING TO MEETING REQUESTS 12
MANAGING YOUR TASKS 13
Creating a New Task 13
Assigning a Task to Someone Else 13
Responding to a Task Assigned to You 14
Delegating a Task Assigned to You 14
Sending Status Reports About a Task Assigned to You 14
Marking a Task Complete 14
Viewing Another Person's Tasks 14
MANAGING YOUR CONTACTS 15
Creating a Contact Manually 15
Creating a Contact Based on a Received Message 15
Creating a Contact Based on Your Company's Address List 15
Viewing Your Contact List 16
Searching for a Contact 16
Deleting a Contact 16
MANAGING CALENDARS AS A DELEGATE 16
Viewing Another Person's Calendar 16
Scheduling a Meeting on Behalf of Someone Else 18
Scheduling a Recurring Meeting on Behalf of Someone Else 19
Scheduling an All-Day Event on Behalf of Someone Else 20
Changing an Appointment, Event or Meeting on Behalf of Someone Else 21
Canceling a Meeting or All-Day Event on Behalf of Someone Else 23
Replying to a Meeting Request on Behalf of Someone Else 23
SYNCHRONIZING YOUR DATA 24
Reporting Problems 24
Synchronizing Manually 25
What Data is Synchronized? 25
Updating the ConnectR Add-in 25
Synchronizing Your Calendar From Scratch 25
BEST PRACTICES 26
GLOSSARY 26
APPENDIX A—RE-ENABLING THE FIND PEOPLE FEATURE 27
APPENDIX B—FREQUENTLY ASKED QUESTIONS 28
INDEX 29

This manual supports Mirapoint ConnectR 5.x release and later until replaced by a newer edition.

Your work environment features Mirapoint mail and calendar servers, the Microsoft Outlook desktop client (rather than the Mirapoint WebMail/WebCal Corporate Edition client), and the Outlook ConnectR add-in—which synchronizes calendar events, calendar attachments, address book entries, and to-do items between the calendar server and your Outlook client.

Because of the inherent differences in the way Outlook and Mirapoint Corporate Edition operate, you have to accomplish some tasks a bit differently than you would in a Microsoft Outlook and Exchange Server environment. This guide provides step-by-step procedures for performing basic calendaring tasks using Outlook in conjunction with Mirapoint servers, as well as instructions for installing and configuring the ConnectR add-in.

This guide documents procedures specifically for the following environment:

- Microsoft Outlook 2010
- ConnectR 5.x
- Mirapoint appliance running Messaging Operating System 4.2.x or higher

Contact your system administrator if you are unsure about the Message Operating System configured with your email account as well any other software versions referenced in this guide.

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System Requirements

ConnectR requires the following:

- A PC running one of the following Microsoft Windows operating systems:
  - Windows 7 (32-bit and 64-bit)
  - Windows Vista (32-bit and 64-bit)
  - Windows XP (32-bit and 64-bit)
- Your PC has one of the following versions of Microsoft Outlook installed:
  - Outlook 2010 (32-bit and 64-bit)
  - Outlook 2007 (32-bit and 64-bit)
- You have administrator privileges on your PC.
- You have network access to your calendar server.
- You have an active WebMail/WebCal Corporate Edition account.

Important: For ConnectR to operate, Outlook must not be configured with a Microsoft Exchange server.

Note: Please contact your system administrator if you are uncertain about any of these requirements.

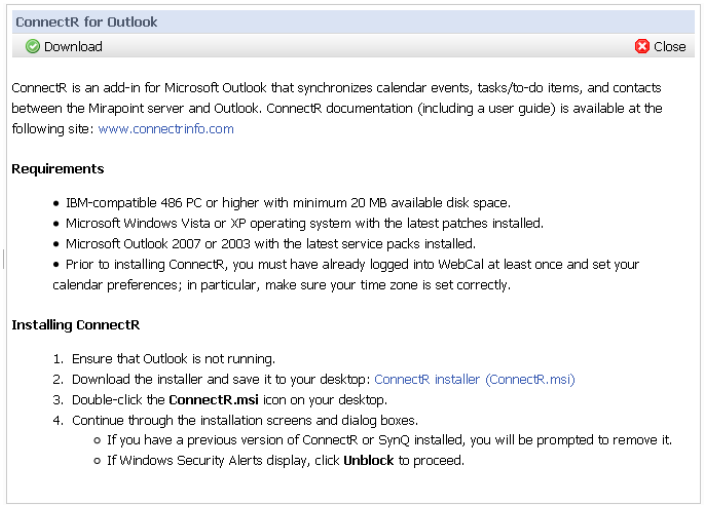
Ensuring That You Have the Latest Windows Updates

In addition to ensuring that you have the correct operating system and version of Outlook to run Outlook ConnectR, you must ensure that you have the latest Windows installed on your PC. Among other things, having the latest updates will prevent XML compatibility issues from occurring. To get the latest updates, do the following:

1. Launch Internet Explorer.
2. Click **Tools > Windows Update**.
   You will be directed to the Microsoft site for Windows updates.
3. Follow the onscreen instructions for installing available updates.

Installing the ConnectR Add-in

1. Launch Corporate Edition by doing the following:
   a. In your browser, enter the following:
      `http://hostname/em`
      Note: hostname is the name of the Corporate Edition server.
   b. Press **Enter**.
      The Corporate Edition login page displays.
   c. In the **User** field, enter the user name for your WebMail/WebCal Corporate Edition account.
   d. Enter your account **Password**.
   e. Click Sign In.
2. Click **Options**.
3. In the Options window, click **Downloads** and then **ConnectR for Outlook**.
   The ConnectR for Outlook page displays.

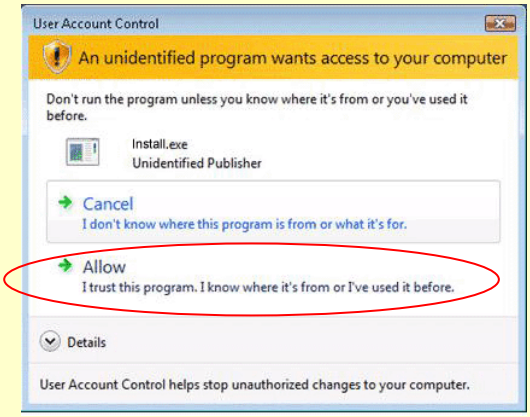


   Note: If the **ConnectR** link is not available, see your system administrator.
4. Click the **ConnectR installer (ConnectR.msi)** link and save the ConnectR.msi to your desktop or another directory.
5. Make sure that Microsoft Outlook is not running.
6. Double-click the **ConnectR.msi** file that you saved in Step 4. If an older version of Outlook ConnectR is already installed, the installer will remove it.
7. Follow the instructions in the ConnectR - InstallShield Wizard screens to complete the installation.

What You Need to Know

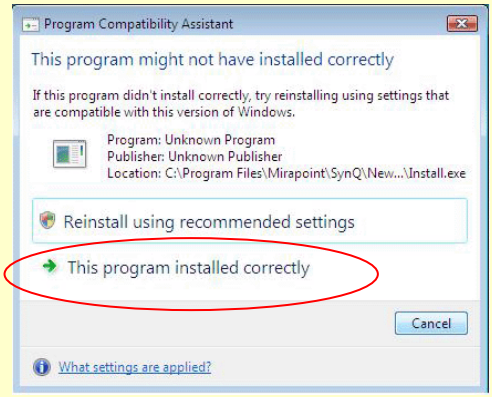
If you install ConnectR 5.x on a computer running the Microsoft Windows 7 or Vista operating system, you might encounter the following dialog boxes. The information below instructs you on what to do if these particular dialog boxes display:

- You might encounter a dialog box informing you that an unidentified program wants to access your computer:



  To ensure the successful installation of ConnectR 5.x, click the **Allow** option.

- You might encounter a dialog box informing you that this program might not have installed correctly:



  To ensure the successful installation of ConnectR 5.x, click the **This program installed correctly** option.

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CONFIGURING CONNECTR

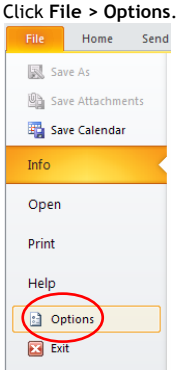
After installing ConnectR, you need to configure your personal account. Optionally, you can set up ConnectR to synchronize another user's calendar and tasks, enabling you to view that user's most up-to-date information. **Note**: The other user must set access permissions on the calendar server that allow you to read and modify his/her calendar items.

ConnectR configuration is accomplished via the ConnectR tab within the Outlook Options dialog box.

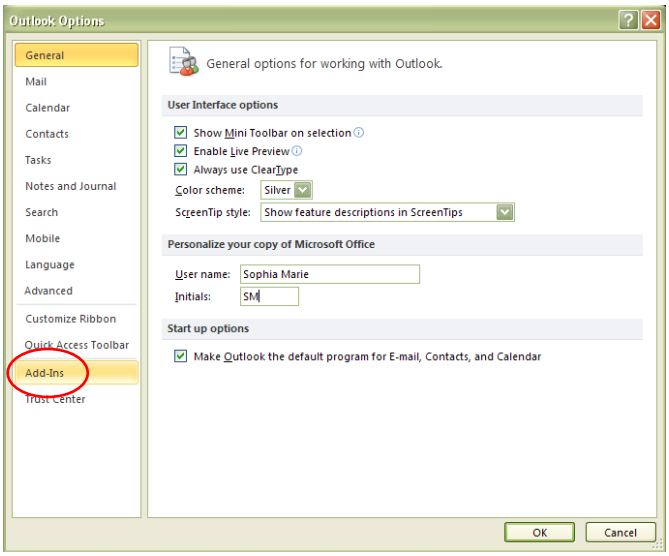
Displaying the ConnectR Tab

To display the ConnectR tab, do the following:

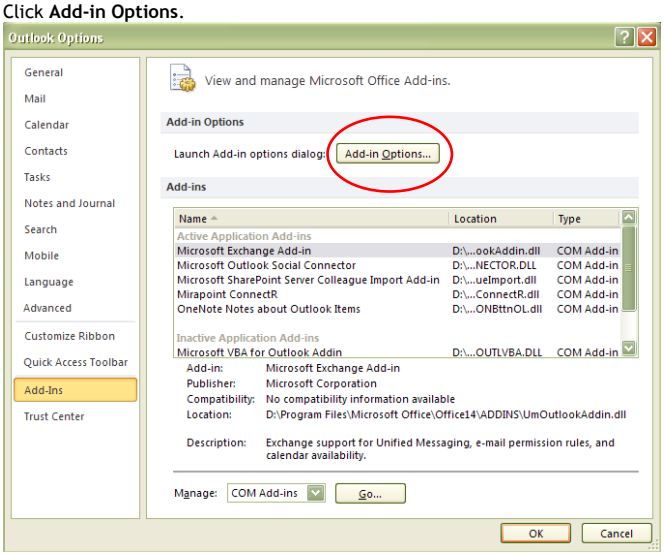
1. Launch Microsoft Outlook.
2. Click **File > Options**.



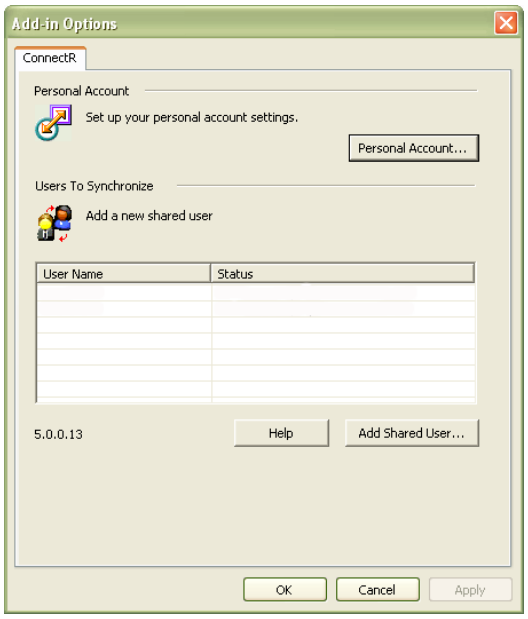
3. In the Outlook Options dialog box, click **Add-Ins**.



4. Click **Add-in Options**.



The **ConnectR** tab within the **Options** dialog box displays.



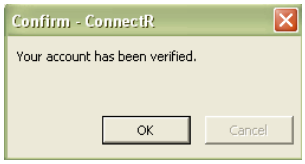
5. (Optional) Continue with the following procedure *Setting Up Your Personal Account* or click **OK** to dismiss the dialog box.

Setting Up Your Personal Account

1. On the **ConnectR** tab, click Personal Account....
   The Personal Account - ConnectR dialog box displays.

2. In the Personal Account section, complete the following fields:
   - **User Name**—Enter your user name on the calendar server.
   - **Password**—Enter your calendar server password.
   - **Server**—Enter the fully qualified host name of your calendar server. For example, *calendar.acme.com*.

   Note: Keep the **Remember Password** option enabled, which is selected by default.
3. Optionally, click the **Use Secure Connection** option.
4. Click Verify....
   The ConnectR installer checks to make sure the personal account information you entered is valid.
5. In the Confirm - ConnectR dialog box, click **OK**.



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Important: If you ever change the Personal Account password so that it no longer matches the password for your calendar server account, you will encounter the Enter User Name and Password - ConnectR dialog box when you attempt to synchronize.

To continue with the synchronization, you'll have to enter the password for your calendar server account in this dialog box, and then click **OK**.

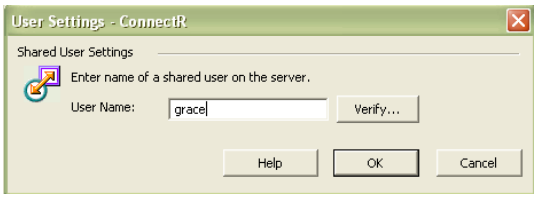
6. When you are finished entering your personal account information, click OK.

Setting Up Users to Synchronize

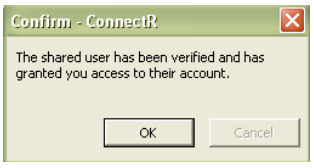
What You Need to Know

To synchronize calendar data with another user, that user must first grant you access permissions on the calendar server that allow you to read and modify events. See the Configuring Access Privileges section for the procedures that the other user must complete.

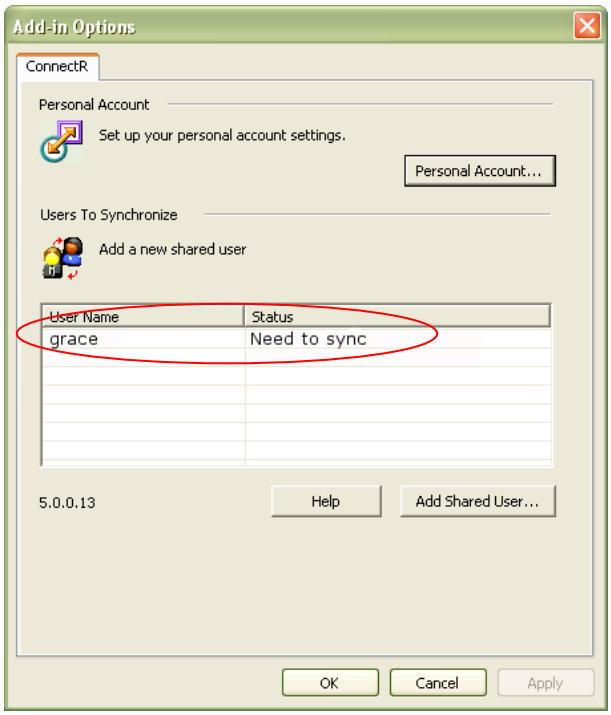
1. If necessary, display the ConnectR tab. (See *Displaying the ConnectR Tab*).
2. On the ConnectR tab, click Add Shared User....
   The User Settings - ConnectR dialog box displays.



3. In the **User Name** field, enter the name of another user who also has an account on your calendar server.
4. If the Enter User Name and Password dialog box displays, enter your **User Name** and **Password**, and then click **OK**.
5. Ensure that the user name is valid by clicking Verify....
6. In the Confirm - ConnectR dialog box, click **OK**.



7. Click OK in the User Settings - ConnectR dialog box.
   The shared user displays displayed in the **Users to Synchronize** list on the ConnectR tab.



8. If appropriate, close the Options dialog box by clicking OK.

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CONFIGURING ACCESS PRIVILEGES

Once you've installed and configured ConnectR, you can start using it to synchronize your calendar events, calendar attachments, address book entries, and to-do items between the calendar server and your Outlook client. The following pages provide step-by-step instructions for completing basic calendaring tasks in Microsoft Outlook with ConnectR installed.

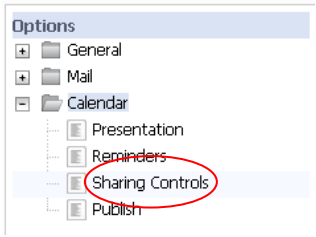
Access control permissions allow you to limit, or allow, users on your system to act on your calendar. If you are going delegate management of your calendar to another user, you need to grant that user the proper access permissions.

Important: You must use Corporate Edition to configure access privileges.

Granting Others Access to Your Calendar

1. Launch Corporate Edition by doing the following:
   a. In your browser, enter the following:
      `http://hostname/em`
      Note: hostname is the name of the Corporate Edition server.
   b. Press **Enter**.
      The Corporate Edition login page displays.
   c. In the **User** field, enter the user name for your WebMail/WebCal Corporate Edition account.
   d. Enter your account **Password**.
   e. Click Sign In.
2. Click the **Options** link.

3. In the left pane, click **Calendar > Sharing Controls**.

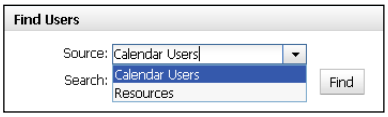


4. You can set access permissions for **Anyone** and/or specific users. **Anyone** is a default user name that specifies permissions for all users. For example, if you grant **Anyone** permission to modify your calendar events, then all users will be able to do so. But by specifying access permissions for individual users, you can control exactly who has access to your calendar and want they can do.

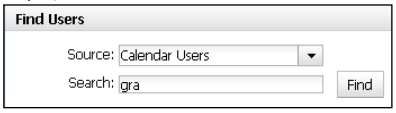
   Complete the following steps to identify specific users:

   a. Click the **User** link.

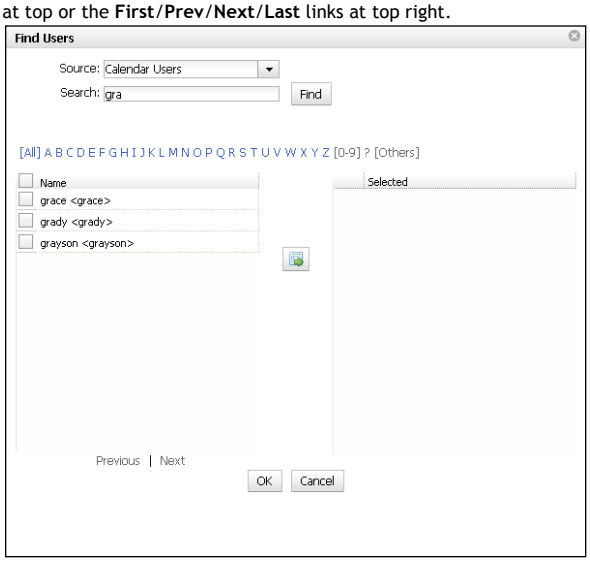
   b. In the Find Users popup window, specify the address book for your search by clicking the **Source** drop-down list. The address books available depend on your particular environment.



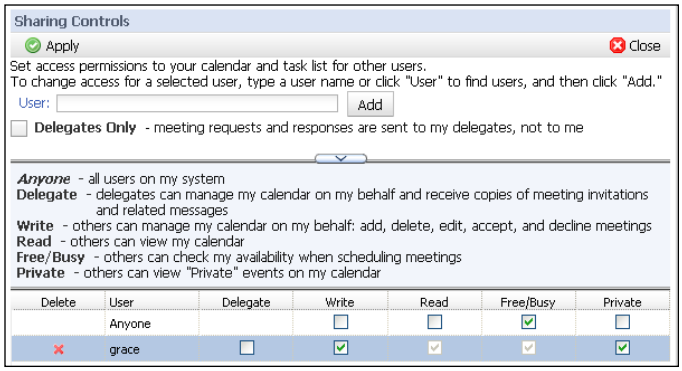
   c. Enter a full or partial name in the **Name** text box. Or if you want your search results to list all the users in the source database you specified (in Step b), leave the text box blank.



   d. Click Find.
      Result: A list of names that match your search criteria display in the window. If necessary, navigate through your results with the Alphabet links at top or the **First/Prev/Next/Last** links at top right.



   e. Click the checkbox next to the person's name and then click the **Add to Selected** icon.
   f. (Optional) If you want to specify more than one user, repeat Step e as necessary.
   g. Click **OK**.
      The Find Users popup window closes and the names display in the User list on the Sharing Controls page.
5. For **Anyone** and/or the user name(s) you specified in Step 4, select a checkbox to add the permissions that apply; deselect a checkbox to remove it:
   - **Delegate**: Allows someone to manage your calendar on your behalf. A delegate will receive copies of your meeting invitations and related messages (including meeting response emails). If you plan to delegate control of your calendar to another person, you need to select this option.
   - **Write**: Determines who can modify or delete your event data; deselected by default. If you select this option, other users can modify your calendar using the **Shared Calendars** page.
   - **Read**: Determines who can read your event data; deselected by default. If you select this option, other users can view your calendar using the **Shared Calendars** page. At minimum, you must grant this permission so that others can share your calendar.
   - **Free/Busy**: Determines who can access your schedule data; selected by default. This allows the system to use your data when the **Check Conflicts** option on the **Add/Edit Event** page is clicked, or you are selected on the **Schedules** page.
   - **Private**: Determines who can view private events on your calendar. If you do not grant this permission, a private event will display as "Private Appointment" to other users.



6. Once you've set the permissions, click **Apply**.
7. Click **Close** to dismiss the Options window.

Denying People Access to Your Calendar

1. Launch Corporate Edition. (If necessary see Step 1 in the previous procedure, *Granting Others Access to Your Calendar*.)
2. Click the **Options** link.
3. In the left pane, click **Calendar > Sharing Controls**.
4. Click the **Delete** icon for a specific user on your access control list.
   Or
   Edit the permissions for a specific user.
5. (Optional) Edit the permissions for the **Anyone** user.
6. Click **Close** to dismiss the Options window.

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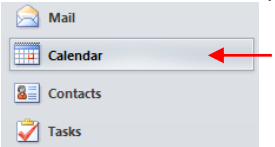
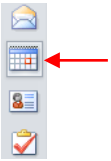
VIEWING CALENDARS

Once you launch Microsoft Outlook, you access the Calendar by clicking the Calendar tab or icon in the left pane.

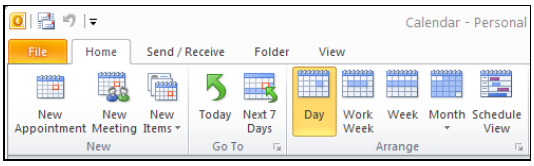


Depending on how your main Outlook view is configured, only the Mail, Calendar, Contacts, and Tasks icons might be visible.



Viewing Your Calendar

1. In the left pane, click Calendar.
2. Click the **Home** tab.
3. Select a viewing option:



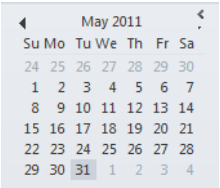
- **Today** - Current day.
- **Next 7 Days** - Today + next following 6 days.
- **Day** - One day.
- **Work Week** - 5-day week (which is commonly Monday through Friday, but it is configurable).
- **Week** - All 7 days of the current week (start day is configurable).
- **Month** - Current month.
- **Schedule View** - Vertical orientation of the last view selected (all views except Month).

What You Need to Know

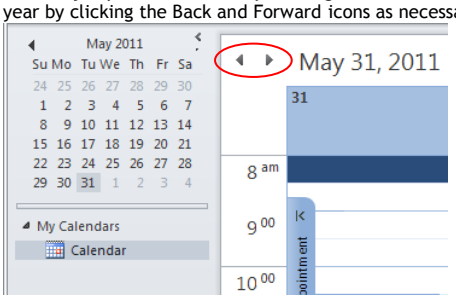
- **Subscribed-to events** set up in Corporate Edition do not display in Outlook. **Solution**: Use Outlook to set up all events.

Using the Date Navigator

The Date Navigator is available in the left pane. A box signifies the current date; dates with meetings/appointments appear in boldface.



You can jump to a new date by clicking the date. Navigate to a different month or year by clicking the Back and Forward icons as necessary.

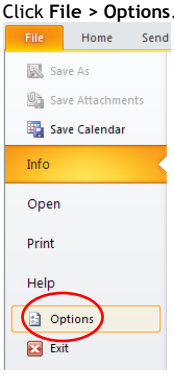


Viewing Another Person's Calendar

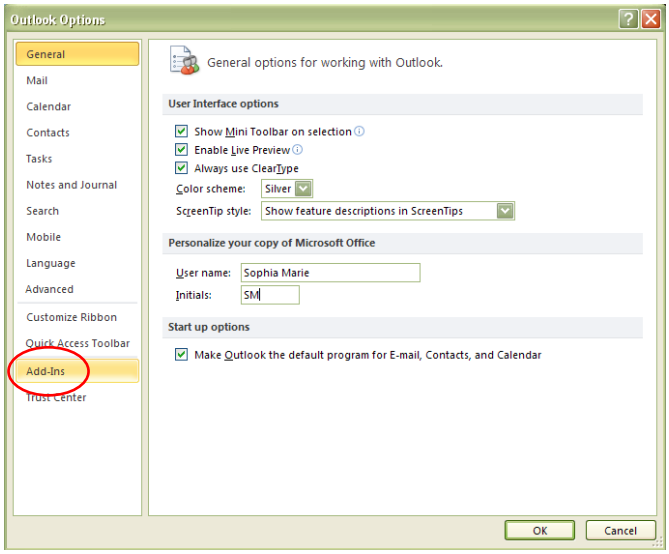
What You Need to Know

To view another person's calendar, that person must first grant you access permissions on the calendar server that allow you to read and modify events. See Granting Others Access to Your Calendar.

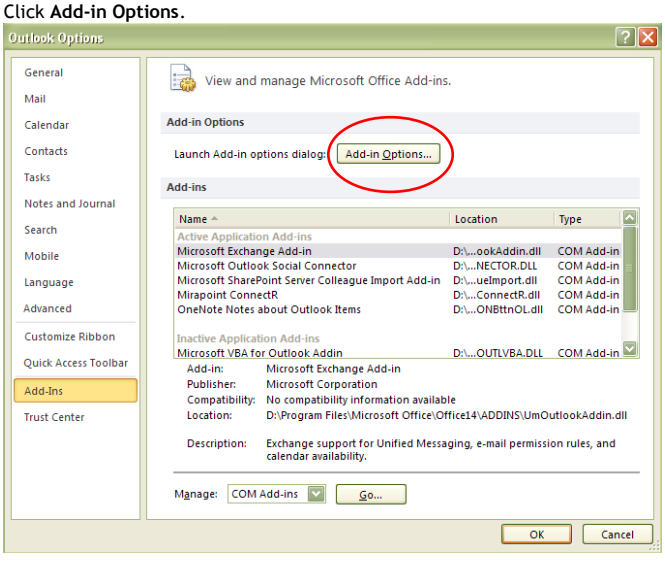
1. Launch Microsoft Outlook.
2. Click **File > Options**.



3. In the Outlook Options dialog box, click **Add-Ins**.



4. Click **Add-in Options**.



The **ConnectR** tab within the **Add-in Options** dialog box displays.

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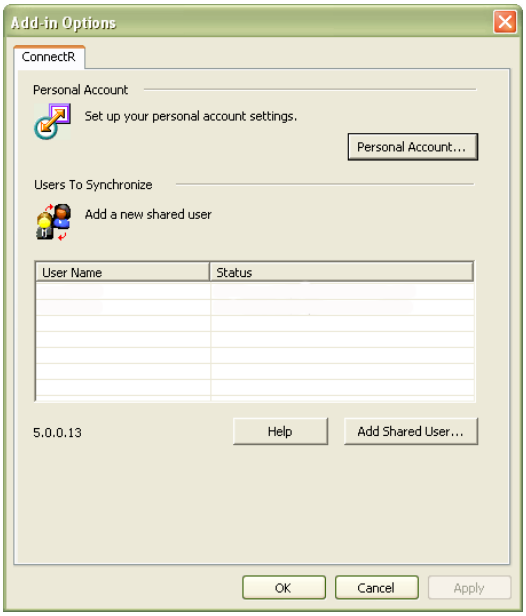
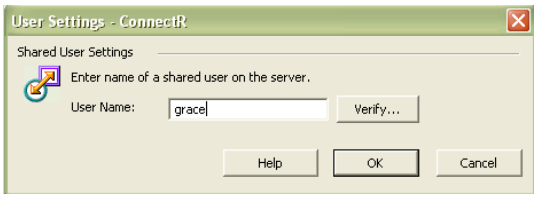
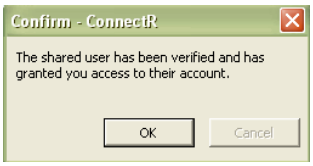


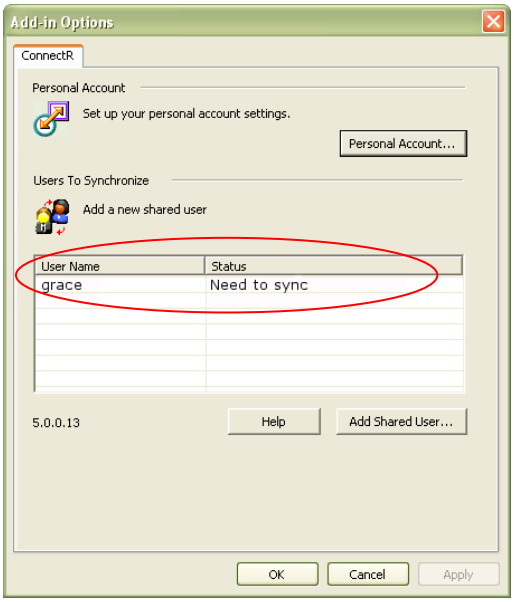
5. On the ConnectR tab, click Add Shared User... .
   The User Settings - ConnectR dialog box displays.



6. In the **User Name** field, enter the name of another user who also has an account on your calendar server.
7. If the Enter User Name and Password dialog box displays, enter your **User Name** and **Password**, and then click **OK**.
8. Ensure that the user name is valid by clicking Verify... .
9. In the Confirm - ConnectR dialog box, click **OK**.

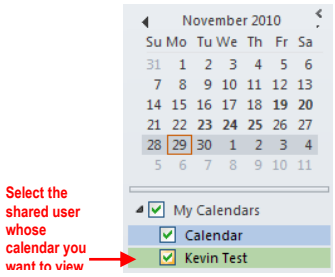


10. Click OK in the Add-in Options - ConnectR dialog box.
    The shared user displays in the **Users to Synchronize** list on the ConnectR tab.

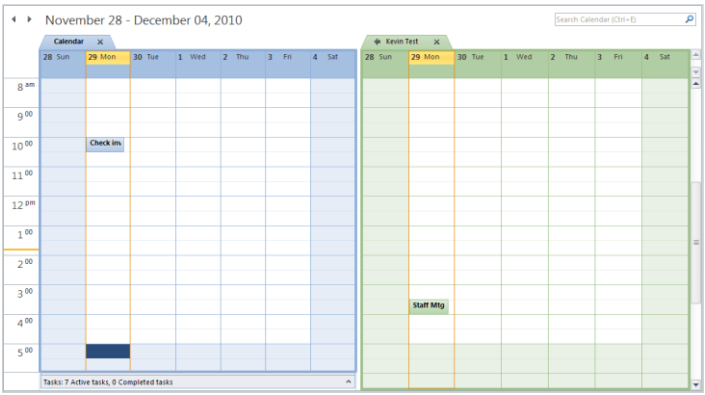


11. Click **OK**.

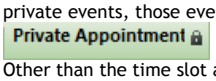
12. In the My Calendars section in the navigation pane, select the checkbox for the shared user whose calendar you want to view. **Note**: The "Calendar" listed first under My Calendars is your own.



The new calendar will appear to the side of any calendar already in the view and in a different color.



Note: If the person whose calendar you are viewing has any private events scheduled and she has not granted you permission to view details about her private events, those events will be labeled "Private Appointment."

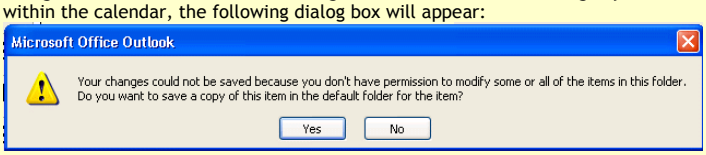


Other than the time slot and date, no other details about the private event will be viewable. (For additional details about private events, see *About Private Events* below.)

About Private Events

A private event will display as "Private Appointment" to users viewing and/or managing your calendar (as in the case of delegates). Additionally, the appropriate time slot and day will be viewable; but, all other details about the event will be hidden from others.

The way private events "behave" in the Mirapoint-Outlook environment differs slightly than in the Microsoft Exchange-Outlook environment. With Exchange, you—as a delegate—are prevented from moving or modifying the time of a private event on a grantor's calendar. For example, if you tried to drag the private event to a different time slot, Outlook would prevent you from selecting and moving the event. In the Mirapoint-Outlook environment, you can visually drag a private event to a different time slot or drag an event border to modify the time; however, the changes will not be saved. After making the modification and clicking anywhere within the calendar, the following dialog box will appear:



Click **No** in the dialog box. (If you click **Yes**, a copy of the private event will be saved locally and appear in your calendar. You will be able to modify this copy; but, any changes you make will not be saved to the calendar server. To prevent possible confusion, click **No** in this dialog box.) Regardless of whether you click No or Yes, the modifications you attempted to make to the grantor's private event will not be saved. Only the grantor can modify or delete his/her private events. To visually restore the private event to its original state, refresh the Outlook display (which you can do by clicking the Mail tab and then clicking the Calendar tab again).

Note: Microsoft Outlook does not allow you to edit a recurring private event so that an occurrence of the event series is not private.

What You Need to Know

- **Subscribed-to events** set up in Corporate Edition do not display in Outlook. **Solution**: Use Outlook to set up all events.

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SCHEDULING, MODIFYING AND CANCELING ACTIVITIES

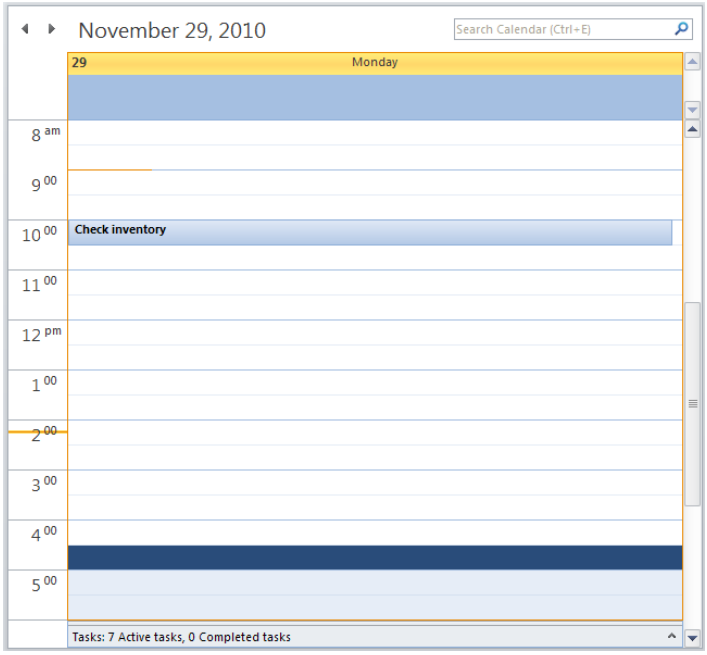
The types of activities you commonly schedule in Calendar are:
Appointments - Activities that you schedule in your calendar that do not involve inviting other people or reserving resources
Meetings - Appointments to which you invite people or for which you reserve resources.
Events - Activities that lasts 24 hours or longer.

What You Need to Know

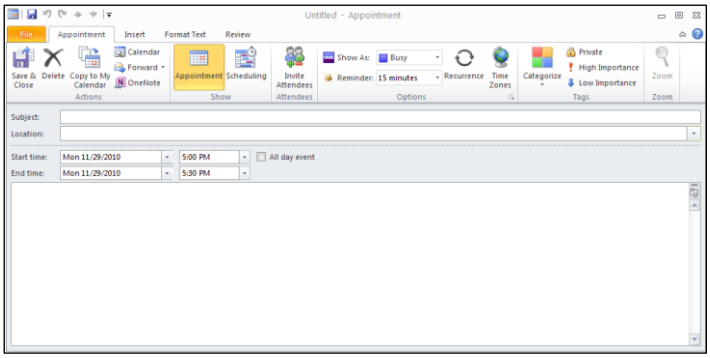
- **You cannot use Corporate Edition distribution lists** set up by your system administrator when scheduling meetings in Outlook. As a workaround, you could use Corporate Edition and the administrator-set up distribution lists to schedule the meeting, and then use Outlook from that point on.
- **Free/busy information is not available** for external attendees who are not part of your Mirapoint email/calendaring system.
- **Attendee email addresses** do not display on the Scheduling tab within Outlook's Meeting window when you first set up a meeting.
- **Optional attendees** (i.e., those attendees who you deem as Optional rather than required) will be regarded as "external attendees" by the system. For external attendees, events to which they are invited will not be scheduled in their calendars, even if they're valid users within your network.

Scheduling a Meeting

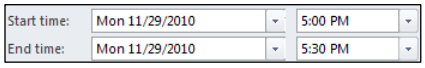
1. In the navigation pane, click Calendar.
2. In the Outlook toolbar, click the Day or Work Week view modes to see detailed time increments.
3. In your calendar, double-click the time slot when you want your meeting to begin.



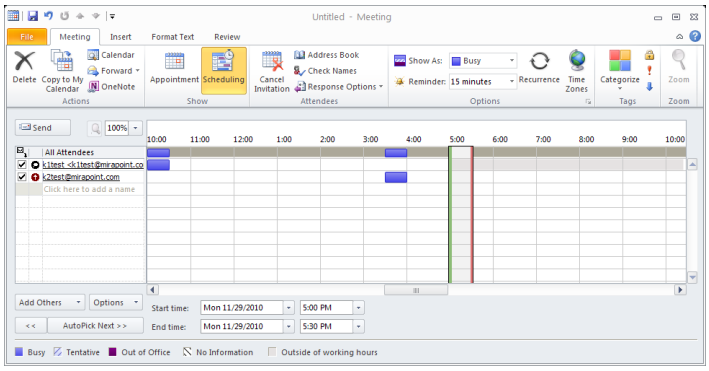
4. In the Appointment window, enter your meeting details (such as Subject and comments).



5. If necessary, use the **Meeting start time** and **Meeting end time** drop-down lists to fine-tune the meeting time.



6. Click Scheduling (Scheduling icon).
7. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



8. Optionally, enter the names of one or more resources. Do this if you want to check the availability of a resource such as a conference room and to reserve it for your meeting. You can also click next to the resource name and then specify Resource (Room or Equipment) in the drop-down list.

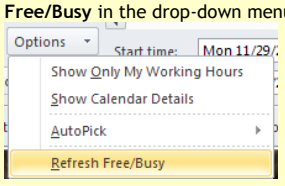
9. In the toolbar, click the **Check Names** icon Check Names to check the validity of the attendees and resources you entered.

   The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

Troubleshooting: Checking for User Names and Free-Busy Information

Here are some things you can do if Outlook doesn't provide valid user and resource names on the Scheduling tab and fails to display free-busy information.

- Try the Outlook keyboard shortcut **Control-K** to force a name lookup and redisplay of free/busy data. Outlook uses a cache of users' free/busy times. At startup this cache is empty. When an event's schedule is viewed for the first time, Outlook requests the free/busy information for each attendee and adds it to the cache. Users' free/busy times are then fetched from the cache as necessary. After a certain amount of time, the cache entries become stale. Pressing **Control-K** initiates a fresh lookup immediately.
  You can also adjust the polling interval when free/busy times are refreshed automatically in Outlook—though this technique is not recommended because of the extra burden you can put on the server. Refer to Outlook's online help and search for the "refresh free/busy" keywords for information on increasing how often free/busy times are refreshed (default is every 15 minutes).
- With the Scheduling tab displayed, you can do the following to refresh free-busy information: Click the **Options** button and the select **Refresh Free/Busy** in the drop-down menu that displays.



10. Once you're satisfied with your meeting details and identified your attendees click Send.

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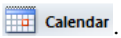
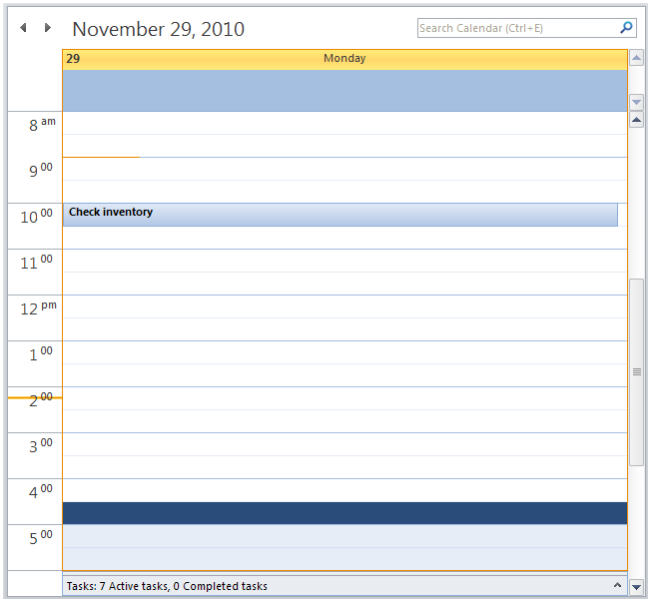
Scheduling a Recurring Meeting

1. In the navigation pane, click 

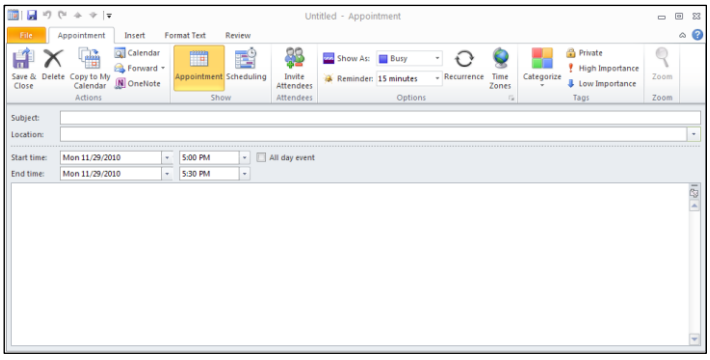
.
2. In the Outlook toolbar, click the

or

view modes to see detailed time increments.
3. In your calendar, double-click the time slot when you want your meeting to begin.

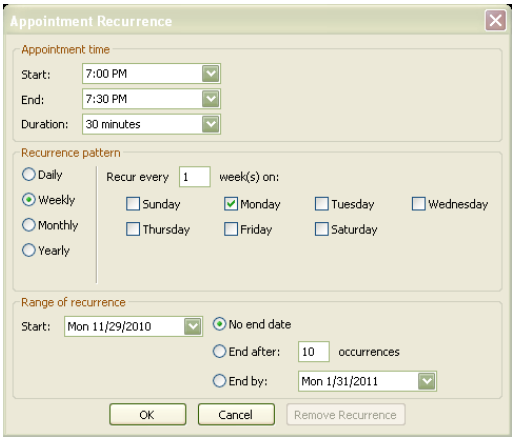


4. In the Appointment window, enter your meeting details (such as Subject and comments).



5. Click the **Recurrence** icon

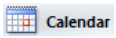
.



The Appointment Recurrence dialog box in the foreground.

6. In the Appointment Recurrence dialog box, enter the meeting and recurrence details and then click **OK.**
7. Complete steps 5-10 in the *Scheduling a Meeting* procedure.

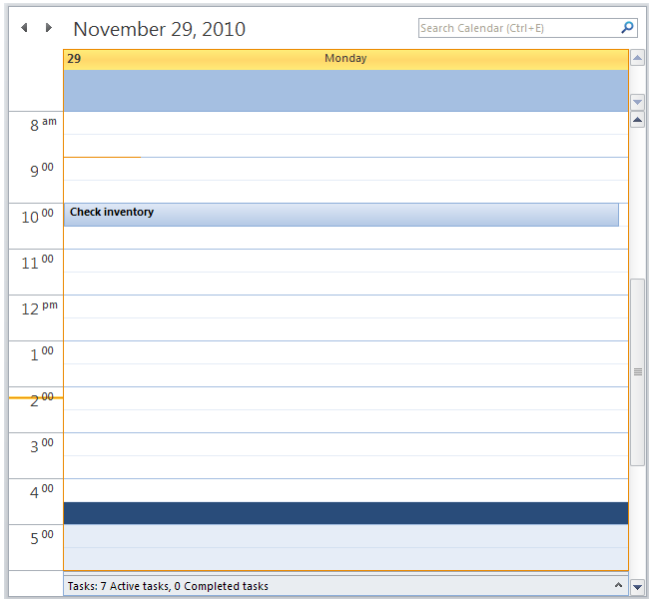
Scheduling an All-Day Event

1. In the navigation pane, click 

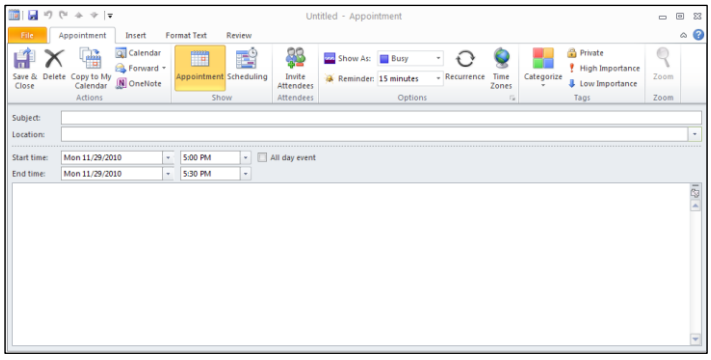
.
2. In the Outlook toolbar, click the

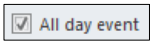
or

view modes to see detailed time increments.
3. In your calendar, double-click the time slot when you want your meeting to begin.



4. In the Appointment window, enter your meeting details (such as Subject and comments).



5. Click the **All day event** checkbox 

.
6. Complete steps 5-10 in the *Scheduling a Meeting* procedure.

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Changing an Appointment, Event or Meeting

When you want to change an appointment, event, or meeting that you own (that is, you set them up originally), you have one or more of the following options available (depending on the particular item type).

- Change options for an item that is not part of series
- Change options for an entire series
- Change options for one item that is part of a series

Refer to the appropriate procedure below for your specific situation.

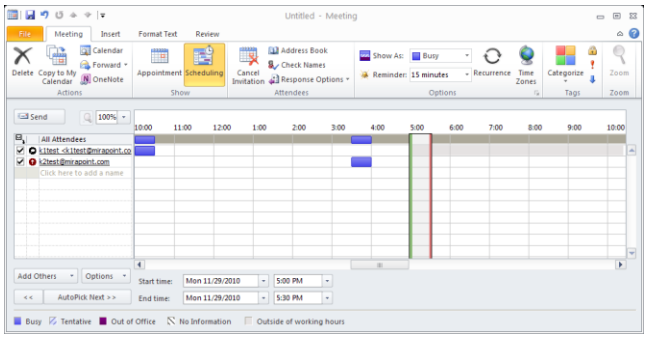
What You Need to Know

Attendees can make changes to events that they do not own. However those changes will not be propagated back to the calendars of the event owner and the other attendees upon synchronization. Only the calendar of the person making the change will be affected. Additionally, if a person modifies an event that he doesn't own and then the event owner makes a change, the owner's change will overwrite any changes made by the attendee.

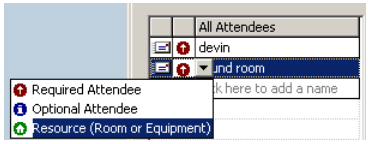
Changing options for an item that is not part of a series.

1. Open the particular appointment, event, or meeting by double-clicking the item in your calendar.
2. Do any of the following:
   - On the Appointment tab, change the options (subject, time, etc.) as necessary.
   - Add new attendees as appropriate, by doing the following:

     a. Click Scheduling (Scheduling icon).
     b. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



     c. Optionally, enter the names of one or more resources. Do this if you want to check the availability of a resource such as a conference room and to reserve it for your meeting. You can also click next to the resource name and then specify Resource (Room or Equipment) in the drop-down list.



     d. In the toolbar, click the **Check Names** icon Check Names to check the validity of the attendees and resources you entered.

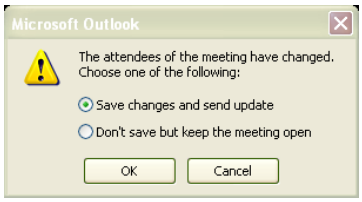
     The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

     If free-busy times aren't available, see Troubleshooting: Free-Busy Information in the *Scheduling a Meeting* procedure.

   - Delete attendees as appropriate by doing the following:

     a. Click Scheduling (Scheduling icon).
     b. Highlight an attendee.
     c. Press **Delete**.

3. Click the Save icon . Additionally, if you changed the attendee list, select the appropriate notification option and then click **OK**.



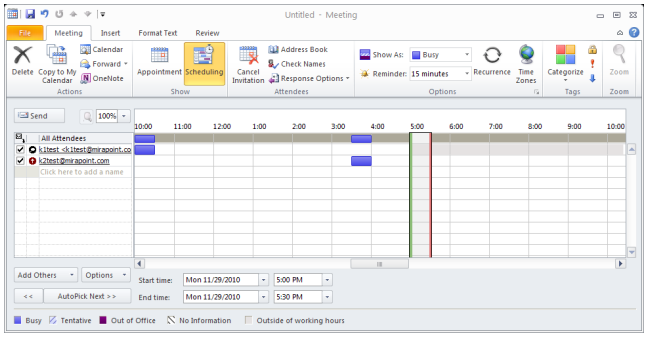
4. In the Microsoft Outlook dialog box, specify whether you want to send a message to the attendees notifying them of your update.

Changing options for an entire series.

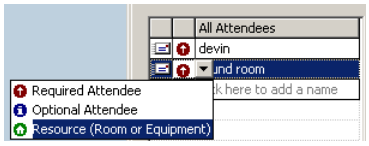
1. Open the particular appointment, event, or meeting by double-clicking the item in your calendar.
2. Click **Open the series** and then click **OK**.

3. Do any of the following:
   - On the Appointment tab, change the options (subject, time, etc.) as necessary.
   - Add new attendees as appropriate, by doing the following:

     a. Click Scheduling (Scheduling icon).
     b. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



     c. Optionally, enter the names of one or more resources. Do this if you want to check the availability of a resource such as a conference room and to reserve it for your meeting. You can also click next to the resource name and then specify Resource (Room or Equipment) in the drop-down list.



     d. In the toolbar, click the **Check Names** icon Check Names to check the validity of the attendees and resources you entered.

     The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

     If free-busy times aren't available, see Troubleshooting: Free-Busy Information in the *Scheduling a Meeting* procedure.

   - Delete attendees as appropriate by doing the following:

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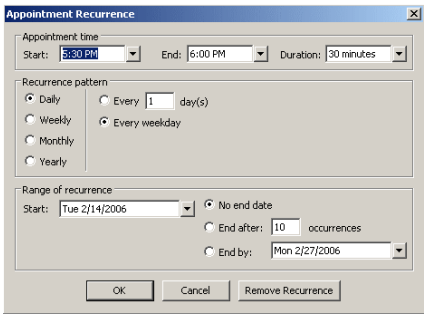
a. Click Scheduling (Scheduling icon).
b. Highlight an attendee.
c. Press **Delete**.

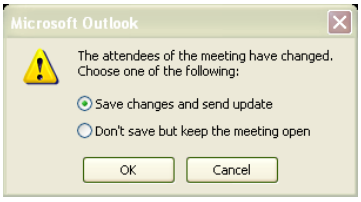
- Change recurrence options

a. Click the **Recurrence** icon Recurrence.
b. Change the options, such as time, recurrence pattern, or range of recurrence, that you want to change.



c. Click **OK**.

4. Click the Save icon. Additionally, if you changed the attendee list, select the appropriate notification option and then click **OK**.



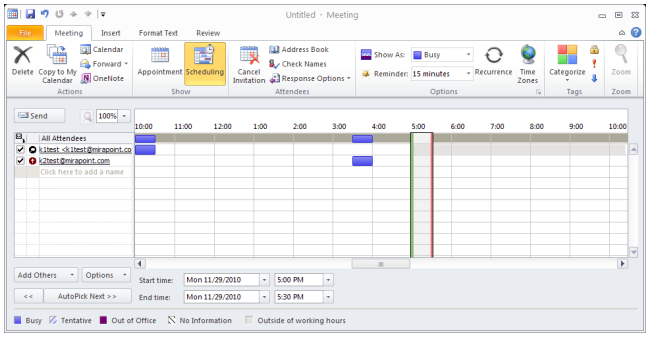
5. In the Microsoft Outlook dialog box, specify whether you want to send a message to the attendees notifying them of your update.

Changing options for one item that is part of a series

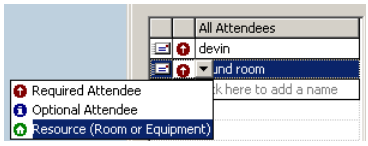
1. Open the particular appointment, event, or meeting by double-clicking the item in your calendar.
2. Click **Open this occurrence**.

3. Do any of the following:
   - On the Appointment tab, change the options (subject, time, etc.) as necessary.
   - Add new attendees as appropriate, by doing the following:
   - Add new attendees as appropriate, by doing the following:

a. Click Scheduling (Scheduling icon).
b. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



c. Optionally, enter the names of one or more resources. Do this if you want to check the availability of a resource such as a conference room and to reserve it for your meeting. You can also click next to the resource name and then specify Resource (Room or Equipment) in the drop-down list.



d. In the toolbar, click the **Check Names** icon Check Names to check the validity of the attendees and resources you entered.

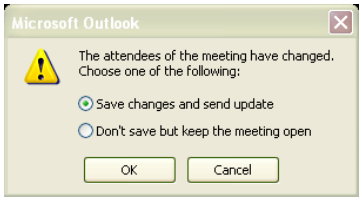
The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

If free-busy times aren't available, see Troubleshooting: Free-Busy Information in the *Scheduling a Meeting* procedure.

- Delete attendees as appropriate by doing the following:

a. Click Scheduling (Scheduling icon).
b. Highlight an attendee.
c. Press **Delete**.

4. Click the Save icon. Additionally, if you changed the attendee list, select the appropriate notification option and then click **OK**.



5. In the Microsoft Outlook dialog box, specify whether you want to send a message to the attendees notifying them of your update.

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Canceling a Meeting or All-Day Event

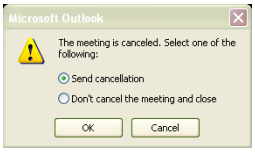
Only the person who set up the meeting can cancel it. **Exception**: Delegate users can cancel meetings on another person's behalf. See *Canceling a Meeting on Behalf of Someone Else*.

To cancel a meeting you set up:

1. Open the specific meeting by double-clicking the item in your calendar.
2. Click the **Cancel Meeting** icon.

3. In the Confirm Delete dialog box, select whether you want to delete this meeting occurrence or the entire series.

4. In the Microsoft Outlook dialog box, select the Send cancellation option and then click **OK**.



Making an Appointment or Meeting Private

When you make an appointment or meeting private, that event will display as a "Private Appointment" to other users viewing your calendar. This is true even for delegates who have full read and write access to your calendar. Additionally, the appropriate time slot and day will be viewable. However, all other details about the private event will be hidden from others.

To make an appointment or meeting private:

1. Schedule a new appointment or meeting that you want to make private. (If necessary, see Scheduling a Meeting.)
   Or
   Open an existing calendar item.
   To do so, simply double-click the calendar item.
2. In the upper right corner of the Appointment or Meeting window, click the **Private** icon

.

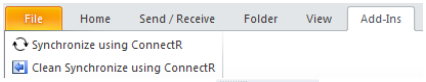
REPLYING TO MEETING REQUESTS

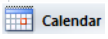
When someone else invites you to a meeting, the meeting request is delivered as a message in your Inbox. The event also displays in your calendar.

1. In the navigation pane, click

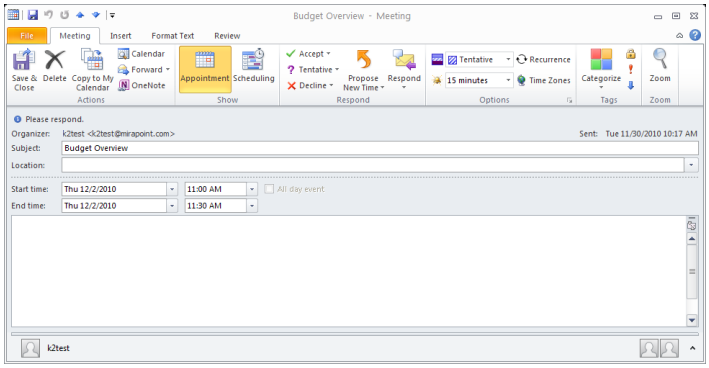
.
2. If necessary, click the appropriate **Inbox** folder in the navigation pane to display your messages.
3. If you see a meeting request in your message list, read the meeting details by either double-clicking it (in which the request displays in a separate window) or viewing it Outlook's reading pane.
   Note: In the future, you can skip this step and look for new items in your calendar.
4. Perform a manual synchronization by doing the following:
   a. Click the Add-Ins tab

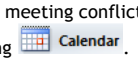
.
   b. In the Add-Ins toolbar, click **Synchronize using ConnectR**.

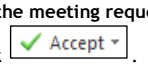


5. Display your calendar by clicking 

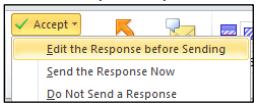
in the navigation pane.
6. Open the meeting request by double-clicking the item in your calendar. If the item is a recurring meeting, click the appropriate option (**Open the occurrence** or **Open the series**) in the Open Recurring Item dialog box.
   The meeting request displays in a separate window.



7. Check to see if the meeting conflicts with another commitment in your calendar by clicking 

.
8. Return to the open meeting request window.
9. Do one of the following as appropriate:
   - **Accept the meeting request:**
     a. Click 

.
     b. Select a response option in the dropdown list.

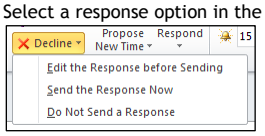


     c. If you selected **Edit the response before sending**, enter your response details in the Accepted window and then click

.

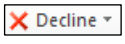
   - **Decline the meeting request:**
     a. Click

.
     b. Select a response option in the dialog box.

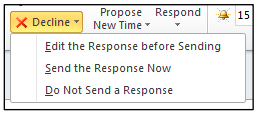


     c. If you selected **Edit the response before sending**, enter your response details in the Accepted window and then click

.

   - **Reply as Tentative:**
     a. Click 

.
     b. Select a response option in the dialog box.



     c. If you selected **Edit the response before sending**, enter your response details in the Accepted window and then click

.

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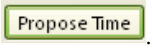
- **Propose another meeting time:**

  a. Click

  .
  b. In the Propose New Time dialog box, enter a different time.
  c. Click 

  .
  d. In the New Time Proposed window, enter details/comments and then click

  .

  Important: The event's owner and attendees will receive an email notifying them of the new time you're proposing. However, that new time will not be reflected in anyone's calendar. The event owner must agree to the new time and then update the event accordingly.

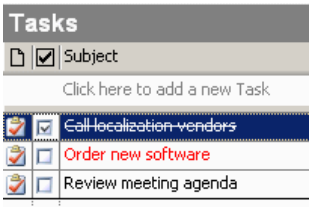
MANAGING YOUR TASKS

You can create tasks (to-do items) for yourself or assign them to others.

What You Need to Know

- Although there are many fields in Outlook that pertain to tasks, ConnectR only synchronizes a few of them. See *What Data is Synchronized?* for the list of fields that are synchronized.
- The synchronization of recurring tasks is not supported.

In your Tasks list, completed tasks display in strikethrough text () and overdue tasks display in red.



Creating a New Task

1. In the navigation pane, click

.
2. Click

(New Task icon).
3. In the Task window, enter a name for the task in the **Subject** field.
4. Optionally, provide any of the following:
   - **Due date** and/or **Start date**: Click the down arrow beside the fields and then click a date in the pop-up calendar.
   - **Status** and/or **Priority:** Click the down arrow and select an applicable item in the resulting menu.
   - **% Complete**: Either select the displayed text in the field and then enter your percentage or click the up/down arrows as appropriate.
5. Optionally, set up a reminder for the task by clicking the **Reminder** check box. Then specify the reminder's date and time by clicking the appropriate down arrow and selecting a date in the pop-up calendar.
6. Optionally, assign the task to a category by doing the following:
   a. Click

.
   b. In Categorize dropdown list, select a category.
   c. Click **OK**.
7. Click **Save & Close**.

Assigning a Task to Someone Else

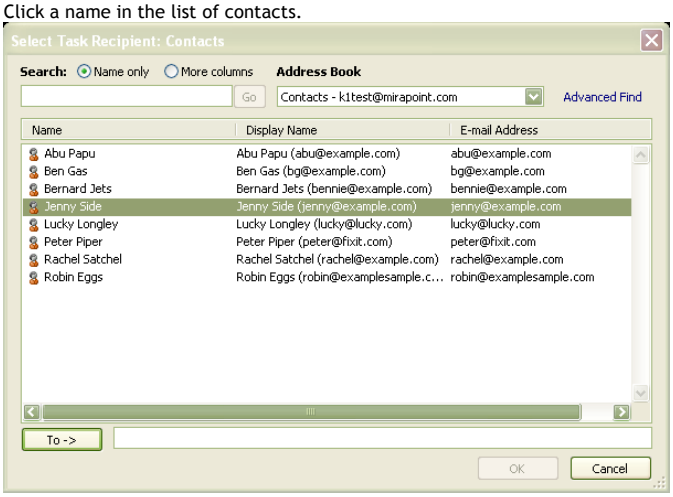
1. In the navigation pane, click

.
2. Click

(New Task icon).
3. Click

(Assign Task icon).
4. In the Task window, click

.
5. In the Select Task Recipient dialog box, select an address book from the **Address Book** dropdown list.
6. Click a name in the list of contacts.



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7. Click To ->. The recipient you selected in Step 5 displays in the **To** field.

8. Repeat steps 4 -6 as necessary.
9. Click **OK**.
10. Enter the task information as explained in steps 3-6 of *Creating a New Task*.
11. In the Task window, click Send (Send icon).

Responding to a Task Assigned to You

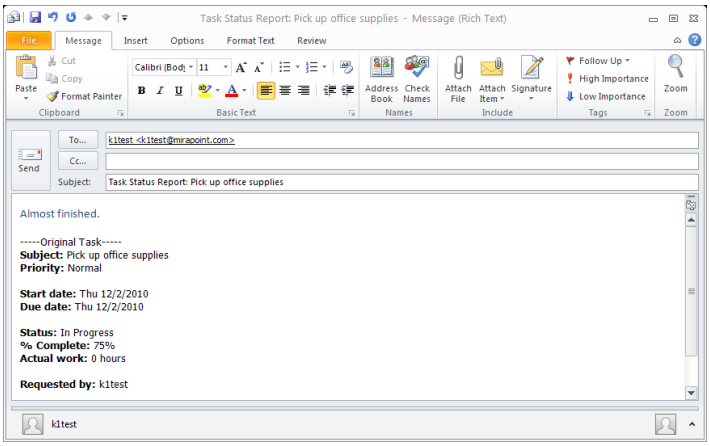
1. In the navigation pane, click Mail.
2. In the message list, double-click the task assignment (which is marked with an assigned task icon).
3. Click the **Accept** or **Decline** icon as appropriate.
4. Click **OK**.
   or
   Optionally add a comment to your reply by clicking **Edit the response before sending**, adding your response in the Task window, and then clicking Send.

Delegating a Task Assigned to You

1. In the navigation pane, click Mail.
2. In the message list, double-click the task you've accepted. (Tasks you accepted display this icon:)
3. Click Assign Task.
4. Complete steps 4-11 in the *Assigning a Task to Someone Else* procedure.

Sending Status Reports About a Task Assigned to You

1. In the navigation pane, click Tasks.
2. Double-click an assigned task you have accepted.
3. Update the task information as appropriate. For example, you can enter a new value for **% Complete**.
4. Click **Send Status Report**.
5. Optionally, enter additional comments if necessary. Your comments will display in blue.



6. Click Send (Send icon).
7. Click **Save & Close**.

Marking a Task Complete

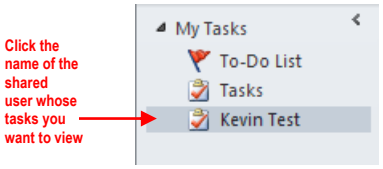
1. In the navigation pane, click Tasks.
2. Select the appropriate task.
3. Click Mark Complete.
   Note: If the task was assigned to you by someone else and you mark it complete, the task owner can overwrite your changes.

Viewing Another Person's Tasks

What You Need to Know

To view another person's calendar, that person must first grant you access permissions on the calendar server that allow you to read and modify events. See the *Granting Others Access to Your Calendar* procedure.

1. If you haven't done so already, set up the person whose tasks you want to view as a shared user. To do so, complete steps 1-8 in *Viewing Another Person's Calendar*.
2. Click Tasks in the Outlook navigation pane.
3. In the My Task section in the navigation pane, click the name of the user whose tasks you want to view. **Note**: The "Tasks" listed first under My Tasks are your own.



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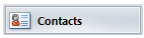
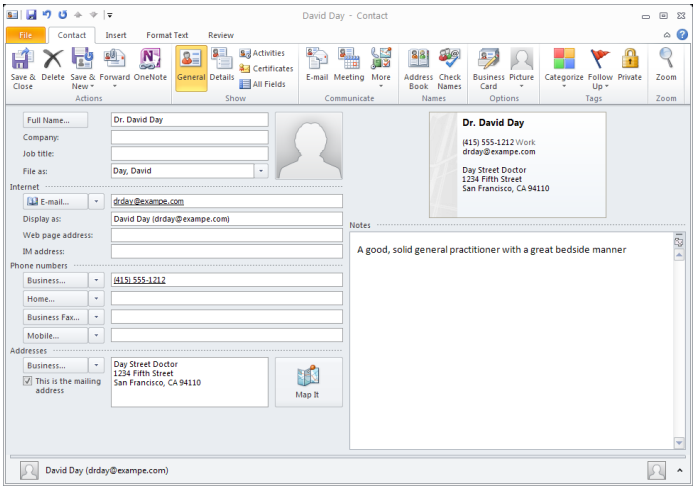
MANAGING YOUR CONTACTS

Creating a Contact Manually

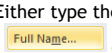
1. In the navigation pane, click 

.
2. Click

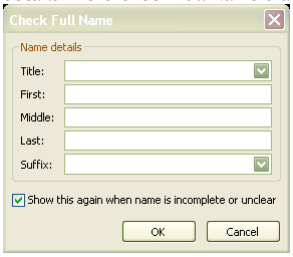
or press **CTRL+N**.
3. Enter general information about your contact as appropriate.



Tips:

- **To enter the contact's name**—Either type the name in the text field next to the **Full Name** button or click 

and provide the appropriate details in the Check Full Name dialog box.

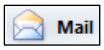


- To enter additional values (such as multiple phone numbers), click the dropdown arrow next to the field name and select the desired option from the dropdown menu. Then enter the value in the text field.

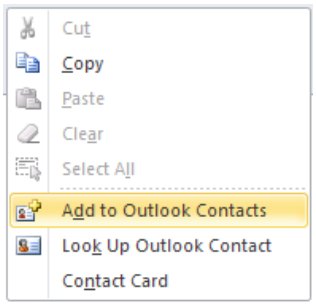
4. Optionally, enter additional contact details by clicking

and filling in the desired fields.
5. Click **Save & Close**.
   Or
   If you want to save your contact and enter another one, click **Save & New**.

Creating a Contact Based on a Received Message

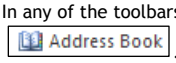
1. In the navigation pane, click 

.
2. Open the message by double-clicking its Subject line in the message list.
3. In the message header, right-click any email address in the **From**, **To**, and **Cc** fields. Then select **Add to Outlook Contacts** in the resulting menu.

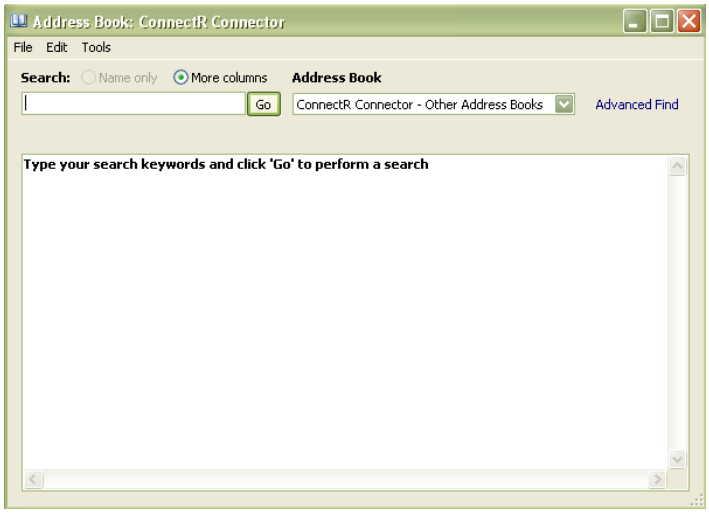


   The Contact window opens with the contact's name and email address already entered.
4. Follow steps 3-5 of *Creating a Contact Manually* to complete the contact entry.

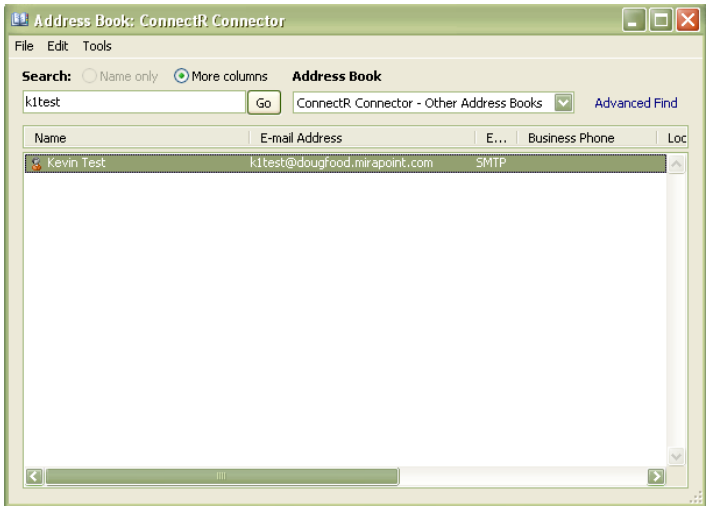
Creating a Contact Based on Your Company's Address List

1. In any of the toolbars (Calendar, Mail, etc.), click the Address Book icon 

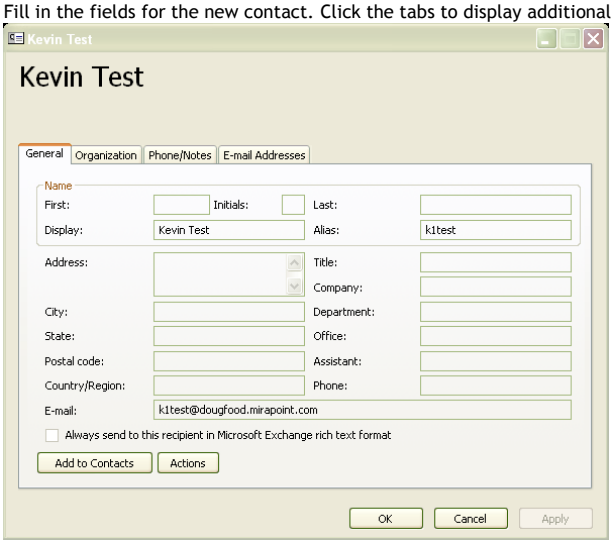
.
2. In the **Address Book** drop-down list, make sure **ConnectR Connector** is selected.



3. If no names are displayed in the list area, do the following:
   a. Enter a name in the Search field.
   b. Click **Go**.
      Search results display in the list area.
4. Single-click a name in the list area.



5. Fill in the fields for the new contact. Click the tabs to display additional fields.



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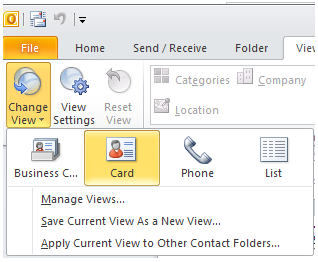
6. Click **Add to Contacts**.
7. Click **Save & Close**.

Viewing Your Contact List

You can change how your contact list is displayed.

1. In the navigation pane, click Contacts.
2. Click the **View** tab.
3. Click Change View and then select a view from the resulting popup.



Searching for a Contact

1. In the navigation pane, click Contacts.
2. In the Search Contacts text box, enter a name.
   A list of results (if any) display below the search box.
3. To display the contact details, double-click the icon for the desired person.

Deleting a Contact

1. In your Contacts list, single-click the person to be deleted.
2. Click the Delete icon in the Contacts toolbar.

MANAGING CALENDARS AS A DELEGATE

An Outlook user (a delegator) can grant another person (a delegate) access to his/her calendar. This arrangement enables the delegate to set up and respond to meeting requests on behalf of the delegator. A common scenario involving a delegate user is an administrative assistant who has been granted access to his manager's calendar and handles meeting requests on her behalf. This section covers tasks that a delegate is likely to perform on behalf of a delegator, as well as key information that that he/she will need to know to use Outlook with the ConnectR add-in.

What You Need to Know

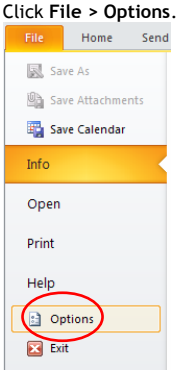
- **Outlook does not recognize distribution lists set up by your system administrator. In other words, you cannot You cannot use Corporate Edition distribution lists** set up by your system administrator when scheduling meetings in Outlook. As a workaround, you can use Corporate Edition and the administrator-set up distribution lists to schedule the meeting, and then use Outlook from that point on.
- **Free/busy information is not available** for external attendees who are not part of your Mirapoint email/calendaring system.
- **Attendee email addresses** do not display on the Scheduling tab within Outlook's Meeting window when you first set up an event. They will display once the event is saved and sent.

Viewing Another Person's Calendar

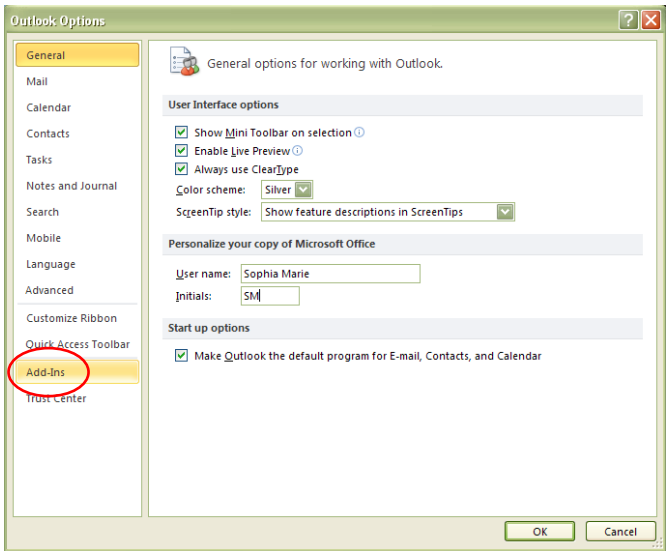
What You Need to Know

To view another person's calendar, that person must first grant you access permissions on the calendar server that allow you to read and modify events. See Granting Others Access to Your Calendar.

1. Launch Microsoft Outlook.
2. Click **File > Options**.



3. In the Outlook Options dialog box, click **Add-Ins**.



4. Click **Add-in Options**.

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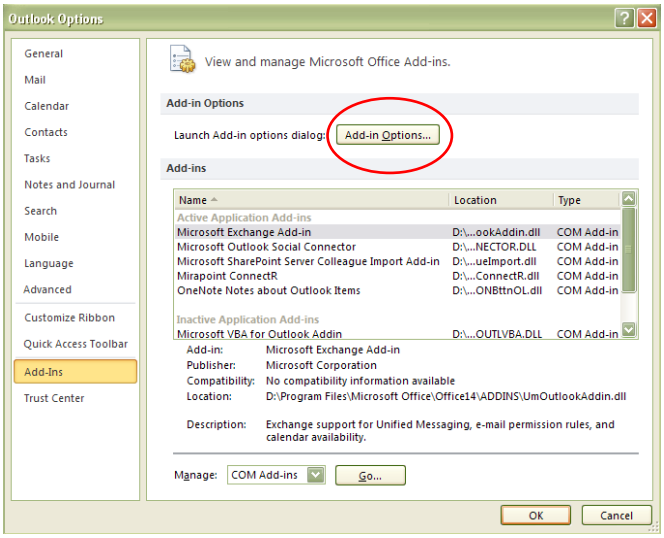
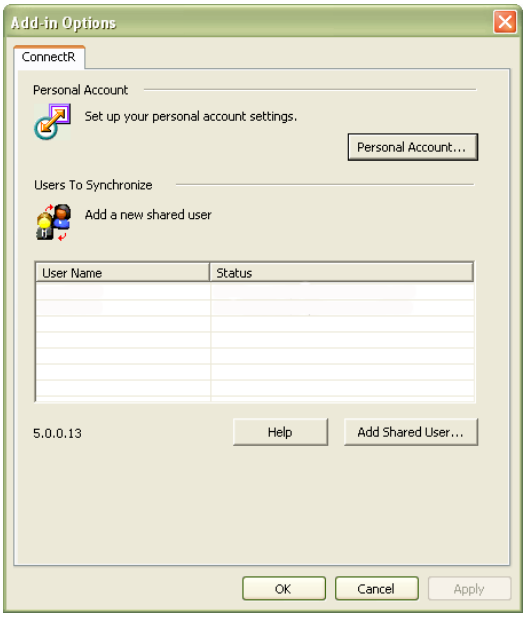
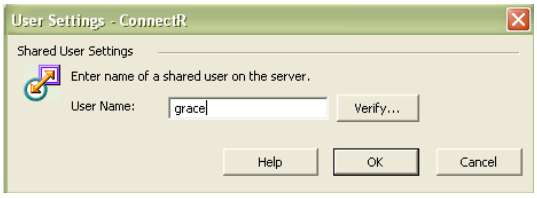


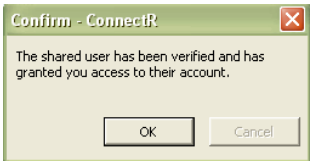
The **ConnectR** tab within the **Options** dialog box displays.



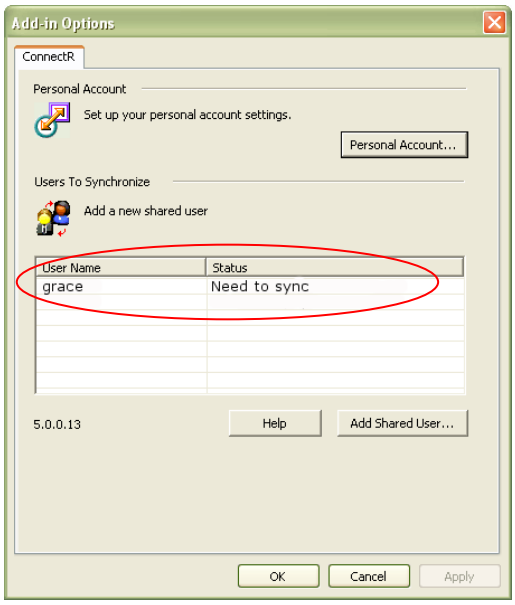
5. On the ConnectR tab, click Add Shared User... .
   The User Settings - ConnectR dialog box displays.



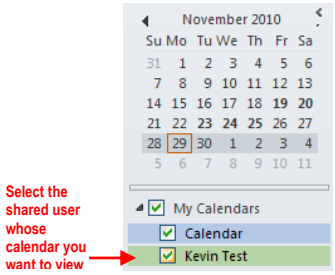
6. In the **User Name** field, enter the name of another user who also has an account on your calendar server.
7. If the Enter User Name and Password dialog box displays, enter your **User Name** and **Password**, and then click **OK**.
8. Ensure that the user name is valid by clicking Verify... .
9. In the Confirm - ConnectR dialog box, click **OK**.



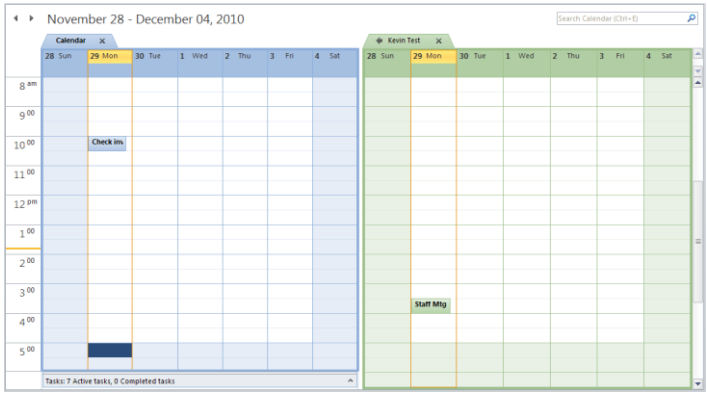
10. Click OK in the Add-in Options - ConnectR dialog box.
    The shared user displays displayed in the **Users to Synchronize** list on the ConnectR tab.



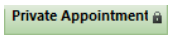
11. Click **OK**.
12. In the My Calendars section in the navigation pane, select the checkbox for the shared user whose calendar you want to view. **Note**: The "Calendar" listed first under My Calendars is your own.



The new calendar will appear to the side of any calendar already in the view and in a different color.



Note: If the person whose calendar you are viewing has any private events scheduled and she has not granted you permission to view details about her private events, those events will be labeled "Private Appointment."



Other than the time slot and date, no other details about the private event will be viewable. (For additional details about private events, see *About Private Events* below.)

What You Need to Know

- **Subscribed-to events** set up in Corporate Edition do not display in Outlook. **Solution**: Use Outlook to set up all events.

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Scheduling a Meeting on Behalf of Someone Else

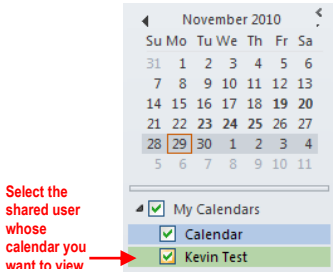
If you've been given access to another person's calendar, you can schedule meetings on their behalf.

1. In the navigation pane, click

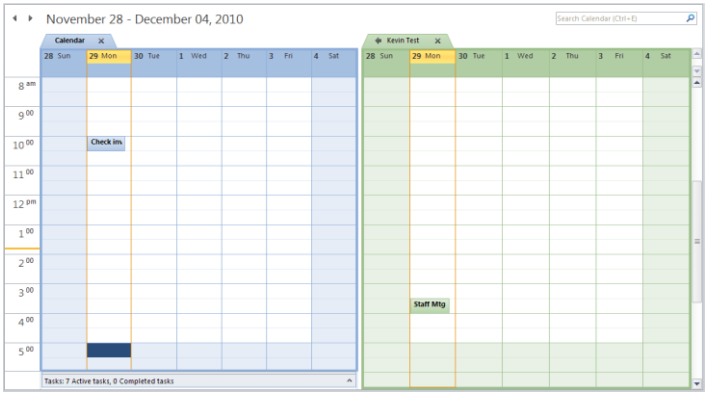
.
2. In the Outlook toolbar, click the

or

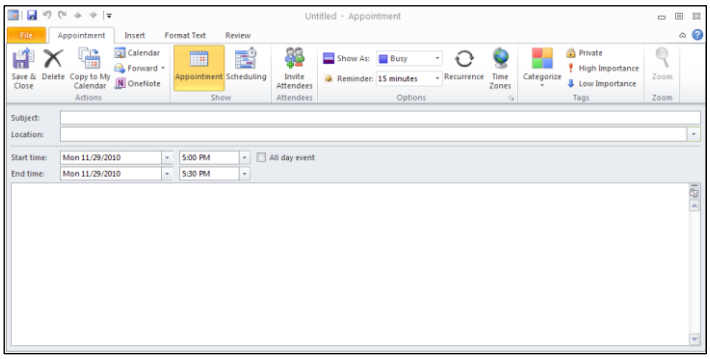
view modes to see detailed time increments.
3. In the My Calendars section in the navigation pane, select the checkbox for the shared user whose calendar you want to view. **Note**: The "Calendar" listed first under My Calendars is your own.



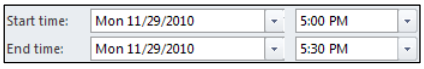
The new calendar will appear to the side of any calendar already in the view and in a different color.



4. Double-click the desired time slot within the calendar for which you're setting up a meeting.
5. In the Appointment window, enter your meeting details (such as Subject and comments).

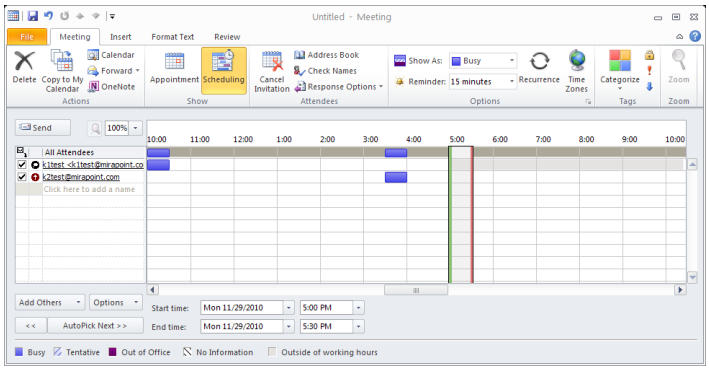


6. If necessary, use the **Meeting start time** and **Meeting end time** drop-down lists to fine-tune the meeting time.

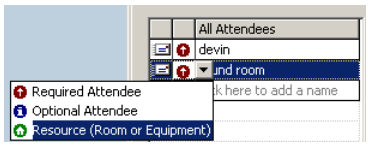


7. Click

(Scheduling icon).
8. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



9. Optionally, enter the names of one or more resources. Do this if you want to check the availability of a resource such as a conference room and to reserve it for your meeting. You can also click next to the resource name and then specify Resource (Room or Equipment) in the drop-down list.



10. In the toolbar, click the **Check Names** icon

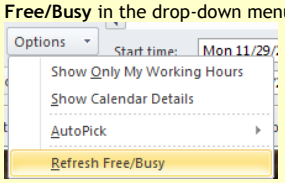
to check the validity of the attendees and resources you entered.

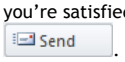
    The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

Troubleshooting: Checking for User Names and Free-Busy Information

Here are some things you can do if Outlook doesn't provide valid user and resource names on the Scheduling tab and fails to display free-busy information.

- Try the Outlook keyboard shortcut **Control-K** to force a name lookup and redisplay of free/busy data. Outlook uses a cache of users' free/busy times. At startup this cache is empty. When an event's schedule is viewed for the first time, Outlook requests the free/busy information for each attendee and adds it to the cache. Users' free/busy times are then fetched from the cache as necessary. After a certain amount of time, the cache entries become stale. Pressing **Control-K** initiates a fresh lookup immediately.
  You can also adjust the polling interval when free/busy times are refreshed automatically in Outlook—though this technique is not recommended because of the extra burden you can put on the server. Refer to Outlook's online help and search for the "refresh free/busy" keywords for information on increasing how often free/busy times are refreshed (default is every 15 minutes).
- With the Scheduling tab displayed, you can do the following to refresh free-busy information: Click the **Options** button and the select **Refresh Free/Busy** in the drop-down menu that displays.



11. Once you're satisfied with your meeting details and identified your attendees click 

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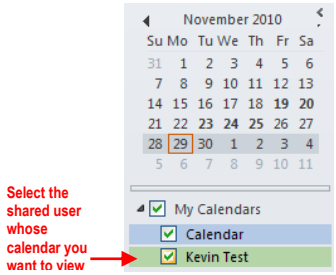
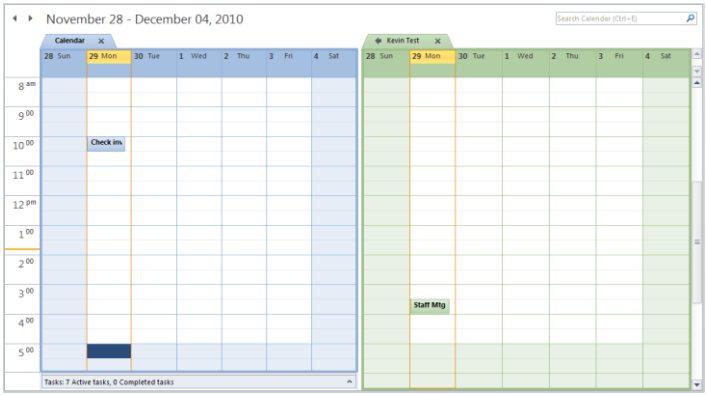
Scheduling a Recurring Meeting on Behalf of Someone Else

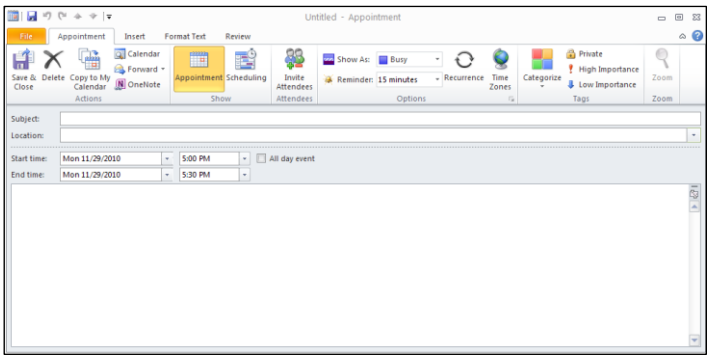
1. In the navigation pane, click Calendar.
2. In the Outlook toolbar, click the Day or Work Week view modes to see detailed time increments.
3. In the My Calendars section in the navigation pane, select the checkbox for the shared user whose calendar you want to view. **Note**: The "Calendar" listed first under My Calendars is your own.



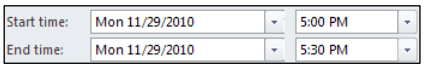
The new calendar will appear to the side of any calendar already in the view and in a different color.



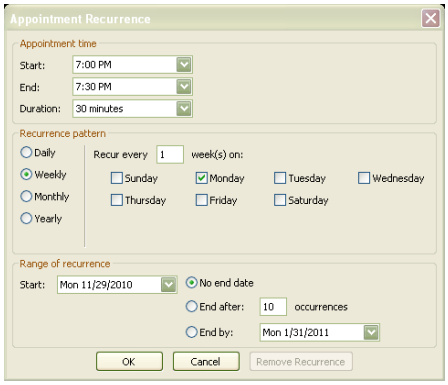
4. Double-click the desired time slot within the calendar for which you're setting up a meeting.
5. In the Appointment window, enter your meeting details (such as Subject and comments).



6. If necessary, use the **Meeting start time** and **Meeting end time** drop-down lists to fine-tune the meeting time.

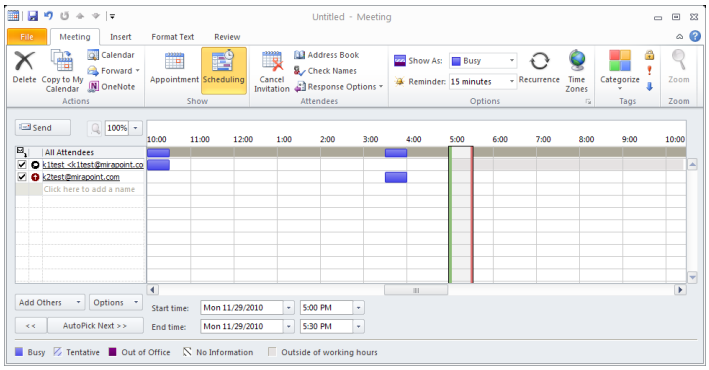


7. Click the **Recurrence** icon Recurrence.

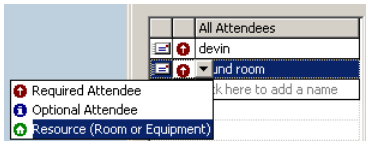


The Appointment Recurrence dialog box in the foreground.

8. In the Appointment Recurrence dialog box, enter the meeting and recurrence details and then click **OK.**
9. Click Scheduling (Scheduling icon).
10. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



11. Optionally, enter the names of one or more resources. Do this if you want to check the availability of a resource such as a conference room and to reserve it for your meeting. You can also click next to the resource name and then specify Resource (Room or Equipment) in the drop-down list.



12. In the toolbar, click the **Check Names** icon Check Names to check the validity of the attendees and resources you entered.

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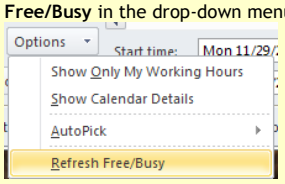
The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

Troubleshooting: Checking for User Names and Free-Busy Information

Here are some things you can do if Outlook doesn't provide valid user and resource names on the Scheduling tab and fails to display free-busy information.

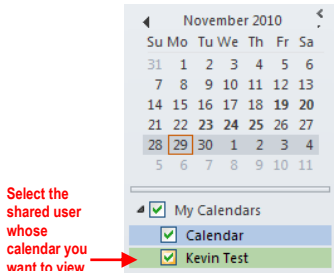
- Try the Outlook keyboard shortcut **Control-K** to force a name lookup and redisplay of free/busy data. Outlook uses a cache of users' free/busy times. At startup this cache is empty. When an event's schedule is viewed for the first time, Outlook requests the free/busy information for each attendee and adds it to the cache. Users' free/busy times are then fetched from the cache as necessary. After a certain amount of time, the cache entries become stale. Pressing **Control-K** initiates a fresh lookup immediately.
  You can also adjust the polling interval when free/busy times are refreshed automatically in Outlook—though this technique is not recommended because of the extra burden you can put on the server. Refer to Outlook's online help and search for the "refresh free/busy" keywords for information on increasing how often free/busy times are refreshed (default is every 15 minutes).
- With the Scheduling tab displayed, you can do the following to refresh free-busy information: Click the **Options** button and the select **Refresh Free/Busy** in the drop-down menu that displays.



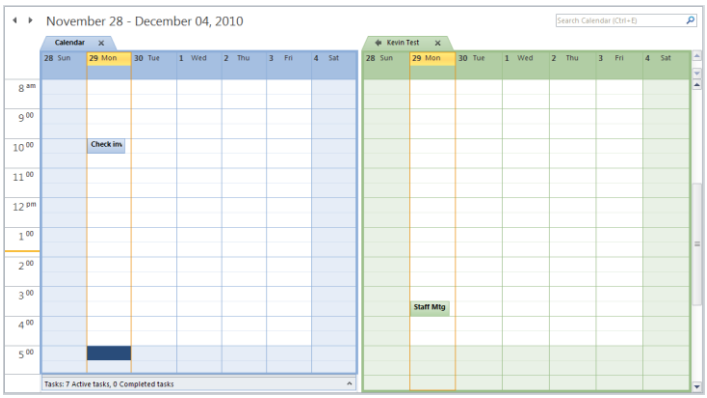
13. Once you're satisfied with your meeting details and identified your attendees click Send.

Scheduling an All-Day Event on Behalf of Someone Else

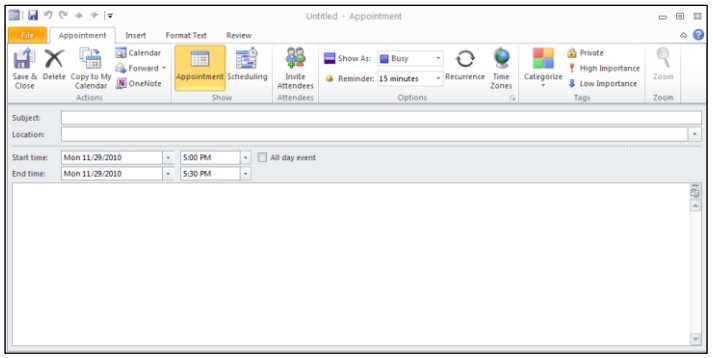
1. In the navigation pane, click Calendar.
2. In the Outlook toolbar, click the Day or Work Week view modes to see detailed time increments.
3. In the My Calendars section in the navigation pane, select the checkbox for the shared user whose calendar you want to view. **Note**: The "Calendar" listed first under My Calendars is your own.



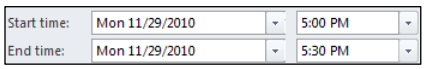
The new calendar will appear to the side of any calendar already in the view and in a different color.



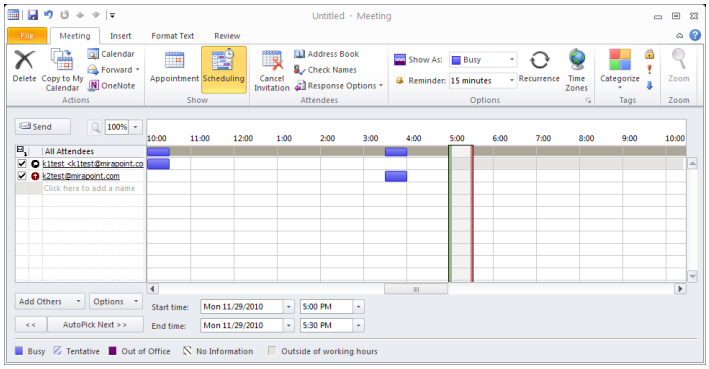
4. Double-click the desired time slot within the calendar for which you're setting up a meeting.
5. In the Appointment window, enter your meeting details (such as Subject and comments).



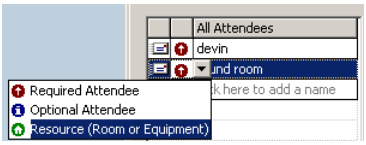
6. If necessary, use the **Meeting start time** and **Meeting end time** drop-down lists to fine-tune the meeting time.



7. Click the **All day event** checkbox All day event.
8. Click Scheduling (Scheduling icon).
9. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



10. Optionally, enter the names of one or more resources. Do this if you want to check the availability of a resource such as a conference room and to reserve it for your meeting. You can also click next to the resource name and then specify Resource (Room or Equipment) in the drop-down list.



11. In the toolbar, click the **Check Names** icon Check Names to check the validity of the attendees and resources you entered.

The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

Troubleshooting: Checking for User Names and Free-Busy Information

Here are some things you can do if Outlook doesn't provide valid user and resource names on the Scheduling tab and fails to display free-busy information.

- Try the Outlook keyboard shortcut **Control-K** to force a name lookup and redisplay of free/busy data. Outlook uses a cache of users' free/busy times. At startup this cache is empty. When an event's schedule is viewed for the first time, Outlook requests the free/busy information for each attendee and adds it to the cache. Users' free/busy times are then fetched from the cache as necessary. After a certain amount of time, the cache entries become stale. Pressing **Control-K** initiates a fresh lookup immediately.
  You can also adjust the polling interval when free/busy times are refreshed automatically in Outlook—though this technique is not recommended because of the extra burden you can put on the server. Refer to Outlook's online help and search for the "refresh free/busy" keywords for information on increasing how often free/busy times are refreshed (default is every 15 minutes).

(more)

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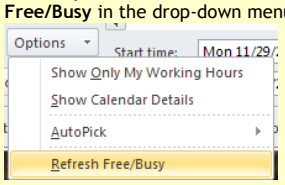
- With the Scheduling tab displayed, you can do the following to refresh free-busy information: Click the **Options** button and the select **Refresh Free/Busy** in the drop-down menu that displays.



12. Once you're satisfied with your meeting details and identified your attendees click Send.

Changing an Appointment, Event or Meeting on Behalf of Someone Else

The procedures in this section are intended for delegates modifying appointments, events, or meetings owned by the grantor.

Important

As a delegate, you can make changes to events on behalf of attendees even though they are not the events' owners. However those changes that you make on behalf of the attendees will not be propagated back to the calendars of the event owner and the other attendees upon synchronization. Only the calendar of the person making the change will be affected. Additionally, if a person modifies an event that he doesn't own and then the event owner makes a change, the owner's change will overwrite any changes made by the attendee.

What You Need to Know

If you need to change a resource for an existing meeting, you cannot drag and drop a calendar item from a resource's calendar to another resource's calendar. To change a resource for an existing meeting, you need to delete the unwanted resource from the Scheduling tab (within the Outlook Meeting window) and then enter the new resource.

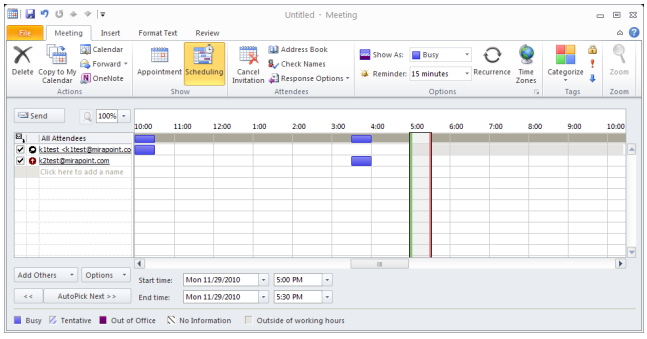
Refer to the appropriate procedure listed below that applies to your specific situation..

- Change options for an item that is not part of series
- Change options for an entire series
- Change options for one item that is part of a series

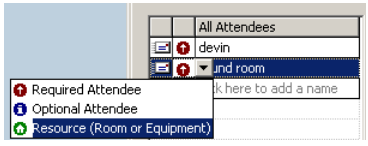
Changing options for an item that is not part of a series.

1. In the event owner's calendar, open the particular appointment, event, or meeting by double-clicking the item.
2. Do any of the following:
   - On the Appointment tab, change the options (subject, time, etc.) as necessary.
   - Add new attendees as appropriate, by doing the following:

     a. Click Scheduling (Scheduling icon).
     b. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



     c. Optionally, enter the names of one or more resources. Do this if you want to check the availability of a resource such as a conference room and to reserve it for your meeting. You can also click next to the resource name and then specify Resource (Room or Equipment) in the drop-down list.



     d. In the toolbar, click the **Check Names** icon Check Names to check the validity of the attendees and resources you entered.

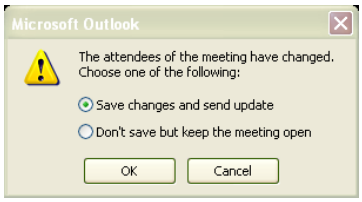
     The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

     If free-busy times aren't available, see Troubleshooting: Free-Busy Information in the *Scheduling a Meeting* procedure.

   - Delete attendees as appropriate by doing the following:

     a. Click Scheduling (Scheduling icon).
     b. Highlight an attendee.
     c. Press **Delete**.

3. Click the Save icon. Additionally, if you changed the attendee list, select the appropriate notification option and then click **OK**.



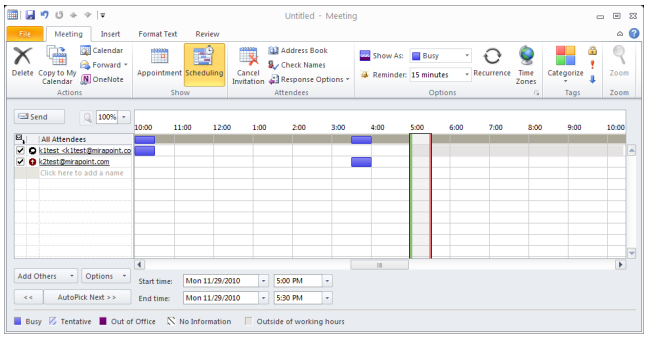
4. In the Microsoft Outlook dialog box, specify whether you want to send a message to the attendees notifying them of your update.

Changing options for an entire series.

1. In the event owner's calendar, open the particular appointment, event, or meeting by double-clicking the item.
2. Click **Open the series** and then click **OK**.

3. Do any of the following:
   - On the Appointment tab, change the options (subject, time, etc.) as necessary.
   - Add new attendees as appropriate, by doing the following:

     a. Click Scheduling (Scheduling icon).
     b. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



     c. Optionally, enter the names of one or more resources. Do this if you want to check the availability of a resource such as a conference room and to reserve it for your meeting. You can also click next to the resource name and then specify Resource (Room or Equipment) in the drop-down list.

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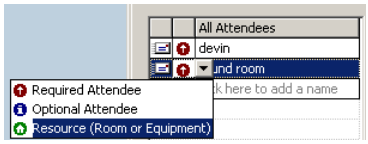


d. In the toolbar, click the **Check Names** icon

to check the validity of the attendees and resources you entered.

The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

If free-busy times aren't available, see Troubleshooting: Free-Busy Information in the *Scheduling a Meeting* procedure.

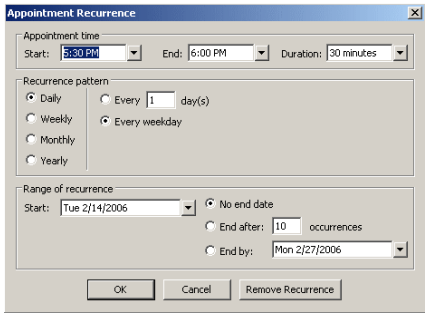
- Delete attendees as appropriate by doing the following:

a. Click Scheduling (Scheduling icon).
b. Highlight an attendee.
c. Press **Delete**.

- Change recurrence options:

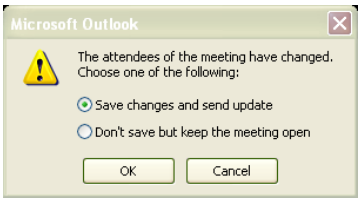
a. Click the **Recurrence** icon

.
b. Change the options, such as time, recurrence pattern, or range of recurrence, that you want to change.



c. Click **OK**.

4. Click the Save icon . Additionally, if you changed the attendee list, select the appropriate notification option and then click **OK**.



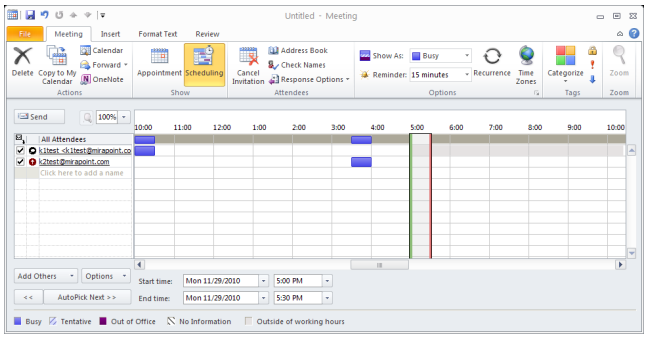
5. In the Microsoft Outlook dialog box, specify whether you want to send a message to the attendees notifying them of your update.

Changing options for one item that is part of a series

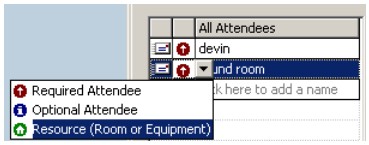
1. In the event owner's calendar, open the particular appointment, event, or meeting by double-clicking the item in your calendar.
2. Click **Open this occurrence**.

3. Do any of the following:
   - On the Appointment tab, change the options (subject, time, etc.) as necessary.
   - Add new attendees as appropriate, by doing the following:

a. Click Scheduling (Scheduling icon).
b. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



c. Optionally, enter the names of one or more resources. Do this if you want to check the availability of a resource such as a conference room and to reserve it for your meeting. You can also click next to the resource name and then specify Resource (Room or Equipment) in the drop-down list.



d. In the toolbar, click the **Check Names** icon

to check the validity of the attendees and resources you entered.

The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

If free-busy times aren't available, see Troubleshooting: Free-Busy Information in the *Scheduling a Meeting* procedure.

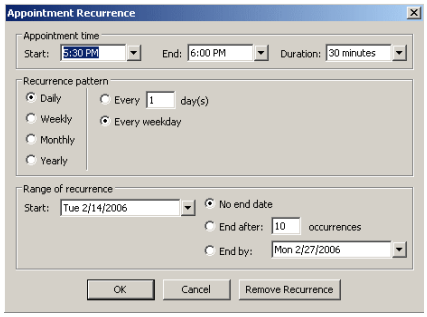
- Delete attendees as appropriate by doing the following:

a. Click Scheduling (Scheduling icon).
b. Highlight an attendee.
c. Press **Delete**.

- Change recurrence options

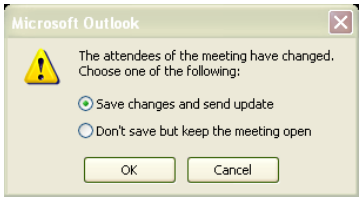
a. Click the **Recurrence** icon

.
b. Change the options, such as time, recurrence pattern, or range of recurrence, that you want to change.



c. Click **OK**.

4. Click the Save icon . Additionally, if you changed the attendee list, select the appropriate notification option and then click **OK**.



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5. In the Microsoft Outlook dialog box, specify whether you want to send a message to the attendees notifying them of your update.

Canceling a Meeting or All-Day Event on Behalf of Someone Else

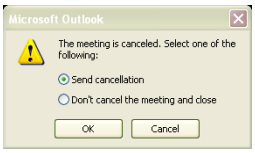
This procedure applies to delegates canceling meetings or all-day events on behalf of the event owner.

1. In the calendar for whom you're making the cancellation, double-click the meeting/event item.
2. If applicable, select the **Open this occurrence** or **Open the series** option as appropriate. Then click **OK**.

3. Click the **Cancel Meeting** icon.

4. In the Confirm Delete dialog box, select whether you want to delete this meeting occurrence or the entire series.

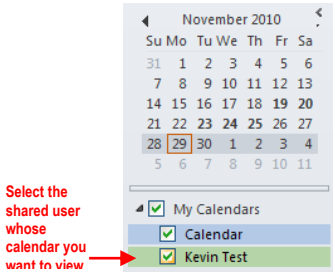
5. In the Microsoft Outlook dialog box, select the Send cancellation option and then click **OK**.



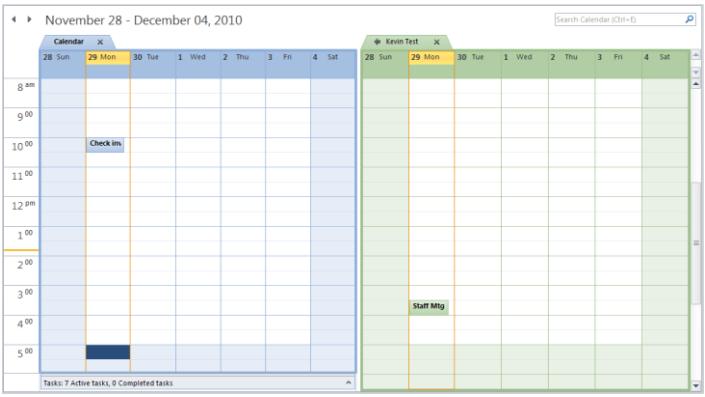
Replying to a Meeting Request on Behalf of Someone Else

The steps for performing this task are considerably different than the ones you would complete in a Microsoft Outlook-Exchange environment, where delegates can gain access to a delegator's Inbox and respond to meeting requests via mail. In the Outlook-ConnectR environment, you—as the delegate—need to respond to meeting requests by accessing the grantor's calendar. However, the grantor must have already viewed or opened the meeting request sent via email in order for the event to appear in his/her calendar.

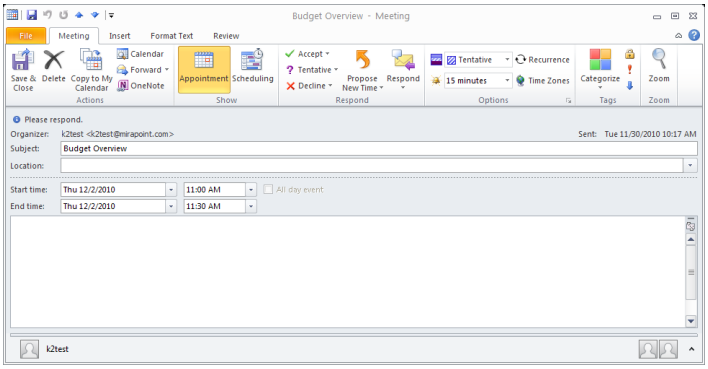
1. In the navigation pane, click Calendar.
2. In the Outlook toolbar, click the Day or Work Week view modes to see detailed time increments.
3. In the My Calendars section in the navigation pane, select the checkbox for the shared user whose calendar you want to view. **Note**: The "Calendar" listed first under My Calendars is your own.



The new calendar will appear to the side of any calendar already in the view and in a different color.



4. In the grantor's calendar, open the meeting request by double-clicking the item in your calendar. If the item is a recurring meeting, click the appropriate option (**Open the occurrence** or **Open the series**) in the Open Recurring Item dialog box.
   The meeting request displays in a separate window.



5. Check to see if the meeting conflicts with another commitment by clicking Calendar.
6. Return to the open meeting request window.
7. Do one of the following as appropriate:
   - **Accept the meeting request:**
     a. Click Accept.

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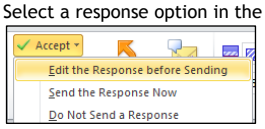
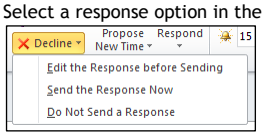
b. Select a response option in the dropdown list.



c. If you selected **Edit the response before sending**, enter your response details in the Accepted window and then click Send.

- **Decline the meeting request:**

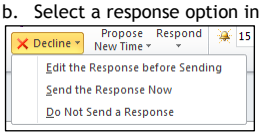
a. Click Decline.
b. Select a response option in the dialog box.



c. If you selected **Edit the response before sending**, enter your response details in the Accepted window and then click Send.

- **Reply as Tentative:**

a. Click Decline.
b. Select a response option in the dialog box.



c. If you selected **Edit the response before sending**, enter your response details in the Accepted window and then click Send.

- **Propose another meeting time:**

a. Click Propose New Time.
b. In the Propose New Time dialog box, enter a different time.
c. Click Propose Time.
d. In the New Time Proposed window, enter details/comments and then click Send.

Important: The event's owner and attendees will receive an email notifying them of the new time you're proposing. However, that new time will not be reflected in anyone's calendar. The event owner must agree to the new time and then update the event accordingly.

SYNCHRONIZING YOUR DATA

Synchronization ensures that the Outlook data regarding your calendar events, calendar attachments, tasks, and contacts exactly matches the information on the calendar server. The first time you synchronize, all data is downloaded and synchronized. After that, synchronization downloads only the data that has been added or modified for synchronization, speeding up the synchronization process.

Important: The amount of time it takes to synchronize depends on the amount of data being synchronized.

ConnectR examines the changes that have occurred to an item since the last synchronization. If a change has been made only to the item in the calendar server, the data in the calendar server overwrites the older information in the matching Outlook item during the next synchronization. If the data in Outlook has changed since the last synchronization, then the data in Outlook overwrites only the older information in the matching calendar server item during the next synchronization. If no changes have been made in either the calendar server or Outlook, the item is not touched during the next synchronization.

A conflict occurs when the same item has been changed in both the calendar server and Outlook since the last successful synchronization. (**Note**: Scheduling multiple events for the same time frame does *not* cause a synchronization conflict. However, Outlook alerts you when you are in the process of setting up a meeting/appointment at the same time as an existing event.)

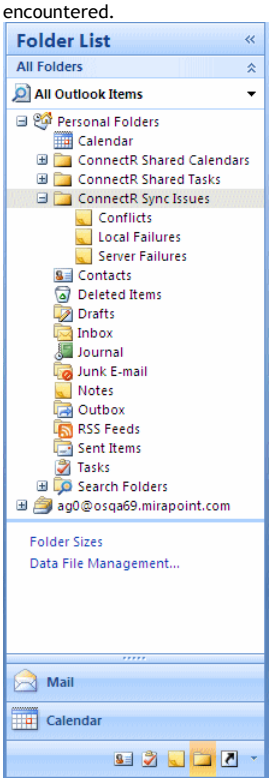
Conflicts are automatically resolved in the background based on the importance of data changes. For example, changes to the start time, end time and recurrence of an event are considered to be major changes and are used to decide the winner of a conflict (that is, which information to keep). A conflict resolution dialog box will appear only if ConnectR detects major changes to the event both on the server and in Outlook.

Reporting Problems

ConnectR creates a ConnectR Sync Issues folder within your Outlook Personal Folders. In turn, ConnectR Sync Issues contains three sub-folders:

- Conflicts—Contains information about the items that caused a conflict during synchronization.
- Local Failures—Contains information about items that failed to update within Outlook.
- Server Failures—Contains information about items that failed to update on the calendar server.

Each item includes the log files associated with the particular sync problem encountered.



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When a synchronization problem occurs, an informational message pops up from the onscreen system tray. To report the problem to your system administrator, do the following:

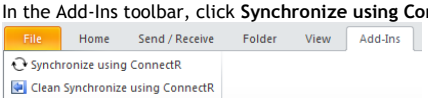
1. Note the type of error (conflict, local failure, server failure) detailed in the informational pop-up message.
2. In Outlook, navigate to the appropriate ConnectR Sync Issues subfolder.
3. Within the subfolder, click the appropriate item.
   The Outlook message window displays.
4. In the **To** line, enter the email address of your system administrator.
5. Click **Send**.

Synchronizing Manually

The ConnectR add-in automatically synchronizes your data in the background However, you can manually initiate synchronization at any time by doing the following:

1. Within Outlook, click the Add-Ins tab

.
2. In the Add-Ins toolbar, click **Synchronize using ConnectR**.



What Data is Synchronized?

ConnectR synchronizes your calendar, task, and contact items. However, some fields/properties have slightly different names in the calendar server and Outlook. (For example, the name of an event on the calendar server is called Title, while the Outlook client calls it Subject.) In addition, not all fields are supported by both. Fields that are not supported by both are preserved and unchanged.
This section lists fields that ConnectR synchronizes.

Calendar Events
Outlook ConnectR synchronizes the new, modified, and deleted calendar events between your calendar server and your Outlook client. Synchronized fields are:

- Title/subject
- Description
- Start date and time
- End date, time, and duration
- Location
- E-mail/pager reminder
- Meeting attendees
- External meeting attendees (people who don't have calendar server accounts)
- Resources, such as conference rooms or equipment (treated as attendees in Outlook)
- All Day event flag
- Recurring events
- Priority
- Privacy event flag
- Event attachments (added to the event description in Outlook)

About Event Location Synchronization
You can enter event locations in the calendar server and in Outlook. The locations on the calendar server are stored and have a schedule of their own that is queried for Free/Busy information when an event is created. When creating an event location in the calendar server, it is synchronized to your Outlook calendar correctly. If you add an event location in Outlook that the calendar server recognizes as a known resource, it is also synchronized correctly.
Note that Outlook allows you to enter an arbitrary location for an event. For example, suppose you want to schedule an off-site meeting at your house. Outlook says that this is not a problem. However, chances are that the calendar server does not recognize your house is a resource, and cannot query Free/Busy status. During its synchronization, these arbitrary event locations are preserved by the calendar server and propagated to all event attendees.

Contacts
ConnectR synchronizes the following Address Book/Contacts properties:

- Full Name
- Last Name
- First Name
- Category
- Company Name
- Email Address
- Street Address
- City
- State
- Zip
- Country
- Work Phone
- Work Fax
- Mobile / Cellular Phone
- Nickname
- Department
- Home Phone
- Job Title
- Pager
- URL
- Birthday
- Anniversary

Tasks
ConnectR synchronizes the following Tasks/To-do items properties:

- Title/subject
- Description
- Due date
- Completion status
- Completion date and time
- Priority

Note: Recurring tasks/to-do items are not supported.

Updating the ConnectR Add-in

If a new version of Outlook ConnectR becomes available, an alert will pop up automatically while you're in Outlook and ask whether you would like to update ConnectR. New versions of Outlook ConnectR may include enhancements, new features, and product bug fixes. Read any release notes and Readme files available for information on the new version of Outlook ConnectR.

Synchronizing Your Calendar From Scratch

Important: Do not complete this procedure unless you are directed to do so by your system administrator.

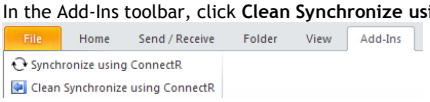
ConnectR provides a "clean sync" feature that lets you synchronize your calendar data from scratch. Occasionally, calendar data within Microsoft Outlook and on the Mirapoint server can get out of sync. Problems such as duplicated events can result. This feature lets you erase all your calendar data from Outlook and resynchronize with the current calendar data on the Mirapoint server. You can also perform a clean sync the other way, where you replace the Mirapoint server data with your Outlook information. Additionally, you can do a clean sync in either direction for any of your shared calendars. Because of the possibility that you could delete calendar events accidentally, you should not run a clean sync unless guided by your system administrator.

Note: Only calendar data is affected by a clean sync; contact and task information is not.

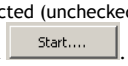
To synchronize your calendar from scratch:

1. Within Outlook, click the Add-Ins tab

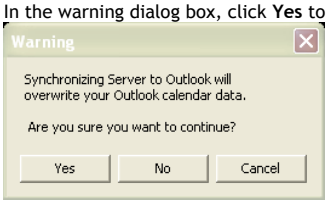
.
2. In the Add-Ins toolbar, click **Clean Synchronize using ConnectR**.



3. In the Clean Synchronize using ConnectR dialog box, select one of the following sync directions:
   - **Server to Outlook**—Your Outlook events will be deleted and replaced with the current calendar information on the Mirapoint server.
   - **Outlook to Server**—The calendar data on the Mirapoint server will be deleted and replaced with the current calendar information in Outlook.

4. If you want to synchronize your shared calendars from scratch, click the **Synchronize shared calendar** option. Otherwise, keep the checkbox de-selected (unchecked).
5. Click 

.
6. In the warning dialog box, click **Yes** to proceed with the clean sync.



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BEST PRACTICES

This section outlines best practices that people should follow when using Mirapoint calendar products.

- **Use calendar sharing for individual users:** When users need to share calendars with each other, use the calendar-sharing capabilities provided by ConnectR and not WebCal. Further, do *not* use the calendar-publishing capabilities in WebCal when sharing calendars among regular users.
- **Use calendar sharing or calendar publishing for groups:** For a common calendar of events (for example, a group calendar for the marketing department), create a dummy user and create events on the dummy user's calendar. For example, you can create a dummy user called "Marketing" and create common events for the marketing group in the "Marketing" calendar. You'll have to turn on the calendar-publishing option for the dummy user. Other users can then "subscribe" to the "Marketing" calendar and see all common marketing events on their calendars.
- **Limited use of "shared write" access:** When users need to share calendars with others, they should—whenever possible—only give "read" access to other users. Provide "Write" access to others only when necessary. This practice prevents random users from writing to a user's calendar.
- **Delegated/Shared Calendaring**
  - Oftentimes a person may delegate his calendar to an administrative assistant. In such cases, a user should delegate his/her calendar to just one person (rather than multiple people) whenever possible. This prevents any confusion resulting from multiple people writing to the same person's calendar.
  - If a user needs to delegate his/her calendar to multiple people, only the primary delegate (such as the primary administrative assistant) should be given write access. All other delegates/administrative assistants should be given read access. This minimizes confusion caused by multiple people writing to the same person's calendar.
  - If a user needs to delegate his calendar to multiple people who all need to write to their manager's calendar, only the primary delegate (such as the primary administrative assistant) should use ConnectR. Other delegates should use WebCal to write to their manager's calendar (instead of using Outlook and ConnectR). This practice prevents problems created when multiple people write to the same calendar and sync at different times.
  - If a delegate (that is, an administrative assistant) only needs read access to his/her manager's calendar from within ConnectR (for example, to be able to print calendars using Outlook, etc.), the delegate can use a one-way "Server to Outlook" sync. This way prevents the delegate from making any inadvertent changes in the manager's calendar.
- **Time Zone Settings:** Make sure that the time-zone settings are set properly on your client and server. WebCal users can set their time-zone preference on the "Options" page. ConnectR users on PC's should set their time-zone information by clicking **Start > Control Panel > Date and Time**. Users who use ConnectR and WebCal should make sure that the same time zone is used in both applications.
- **Use the latest software:** Unless otherwise advised, use the latest version of the Mirapoint MOS (Messaging Operating System), ConnectR, and Outlook available.

What You Need to Know

If a WebCal user subscribes to a calendar that contains events that are already included in the user's calendar, WebCal will display two entries for the same event. This is the intended behavior.

GLOSSARY

- **Appointments/Meetings/Events**
  - **Appointments**—An appointment is an activity that you schedule in your calendar that does not involve inviting other people or reserving resources.
  - **Meetings**—A meeting is an appointment you invite people to or reserve resources for.
  - **Events**—An event is an activity that lasts 24 hours or longer. Examples of an event include a trade show, the Olympics, a vacation, or a seminar. Usually, an event occurs once and can last for one day or several days, but an annual event, such as a birthday or anniversary, occurs yearly on a specific date. Events and annual events do not occupy blocks of time in your calendar; instead, they appear in banners. (A banner is an event or holiday name that appears at the top of the dates you specify in your calendar.)
- **Delegate**—A person who has been delegated access to someone else's calendar, Inbox, or other folders. For example, a grantor gives another person (the delegate) access to his calendar so that the delegate can schedule meetings on his behalf.
- **Distribution list**—A group of mail recipients that is addressed as a single recipient. They're to send email to groups of people without having to enter each recipient's individual address.
- **Grantor**—A person gives another person (a delegate) access to his/her calendar. A common scenario is an executive (grantor) who gives an administrative assistant (delegate) access so to her calendar so that the administrative assistant can manage her calendar.
- **Free/busy information**—Times when users are free or busy based on the items scheduled in their calendars. Free/busy times are indicated in a schedule grid by multiple colors and patterns. Such information is critical to scheduling meetings when attendees are available.
- **Publish**—Mark a calendar as public so that other users can subscribe to it. Only appropriate for lists of public events or similar common data. In the ConnectR-Outlook environment, publishing is configured via WebMail/WebCal.
- **Share**—You grant another user, or possibly all users, read and/or write access to your calendar. In the ConnectR-Outlook environment, sharing is configured via WebMail/WebCal.
- **Subscribe**—Merge events from a public calendar, such as a list of holidays or sports events, into your own. In the ConnectR-Outlook environment, subscribing is configured via WebMail/WebCal.

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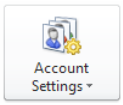
Appendix A—Re-enabling the Find People Feature

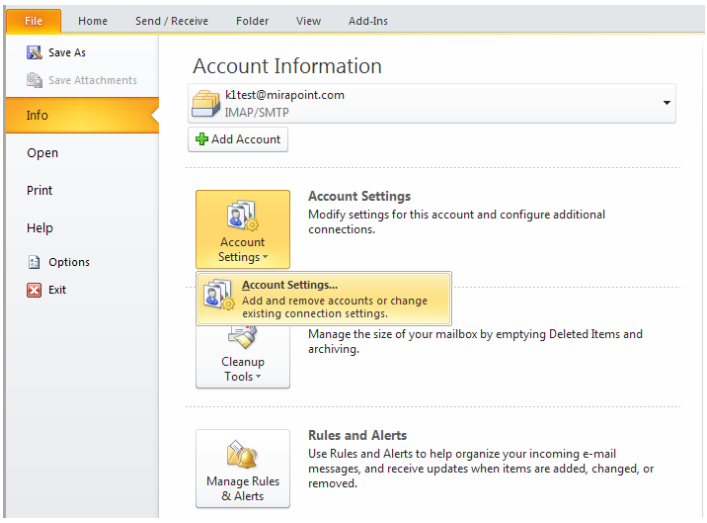
In the event that the **ConnectR Connector** LDAP entry was deleted after Outlook ConnectR was installed, you can manually enable the Find People feature in Outlook 2010. (The ConnectR Connector LDAP entry is set up and the Find People feature is enabled automatically during a successful ConnectR installation.)

To enable the Find People feature, do the following:

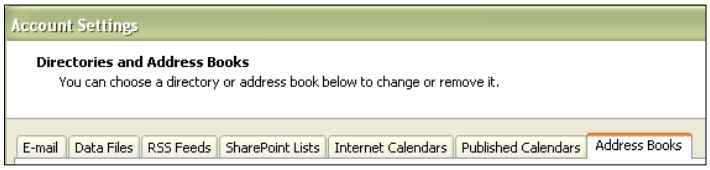
1. In Outlook, click the **File > Info**.
2. On the File Account screen, click **Account Settings**.



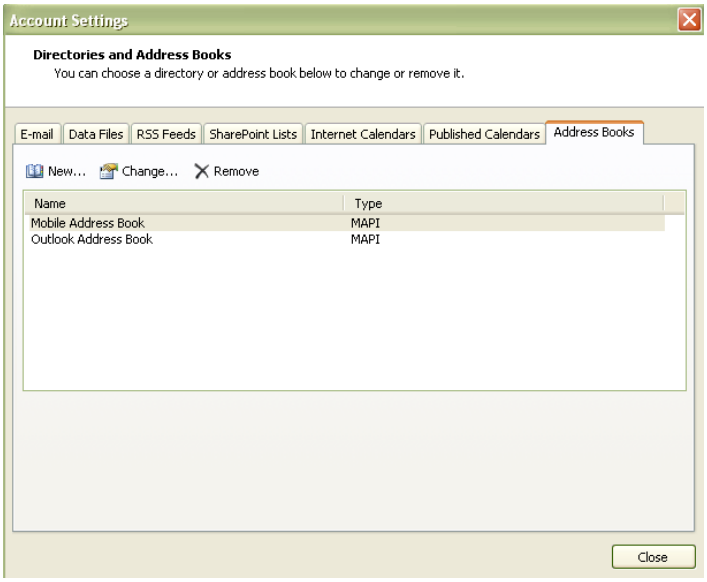
3. In the drop-down menu, click **Account Settings**.



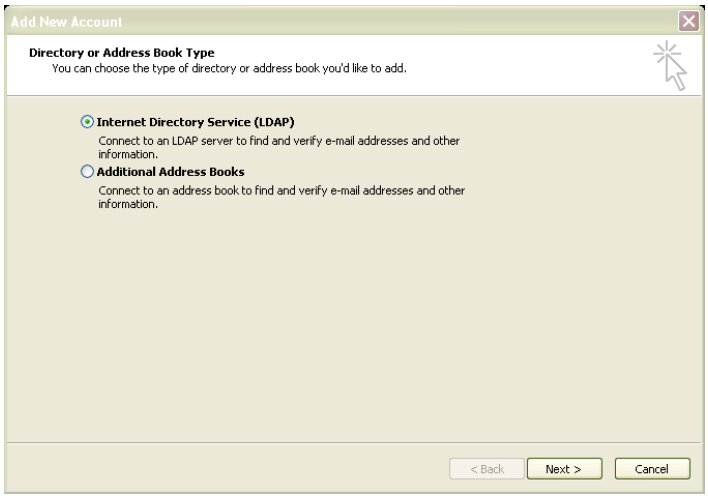
4. In the Account Settings dialog box, click the **Address Books** tab.



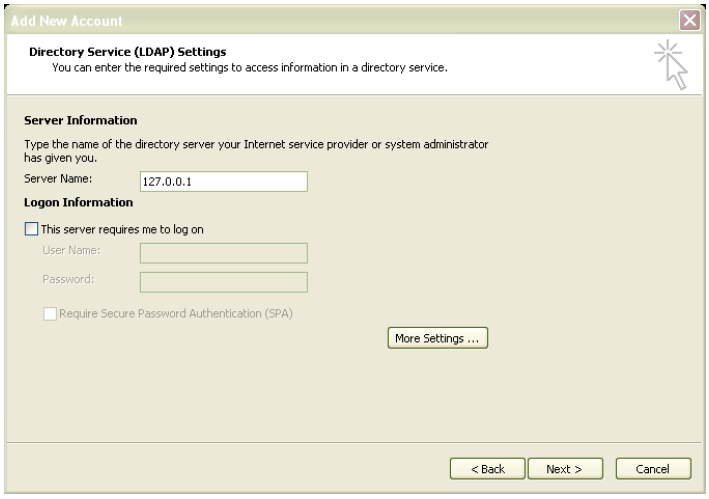
5. On the Address Books tab, click **New**.



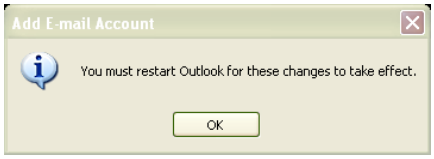
6. Select **Internet Directory Service (LDAP)** and then click **Next**.



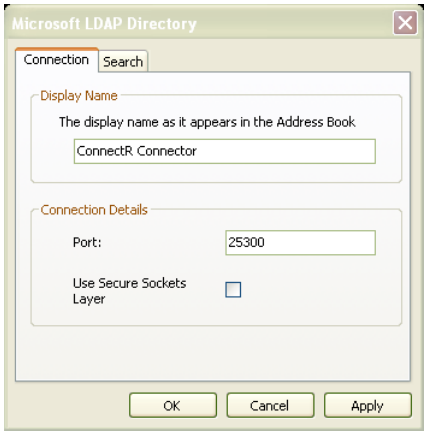
7. In the **Server Name** field, enter **127.0.0.1** and then click More Settings ....



8. In the Add-Email Account dialog box displays, click **OK**.



9. On the **Connection** tab, do the following:
   a. In the **Display Name** field, enter **ConnectR Connector**.
   b. In the **Port** field, enter **25300.**
   c. Click **Apply**.



10. Click the **Search** tab.
11. On the **Search** tab, do the following:
    a. Click the **Custom** radio button.
    b. In the Custom text box, enter the following: **dc=my-domain,dc=com**
    c. Click **Apply**.

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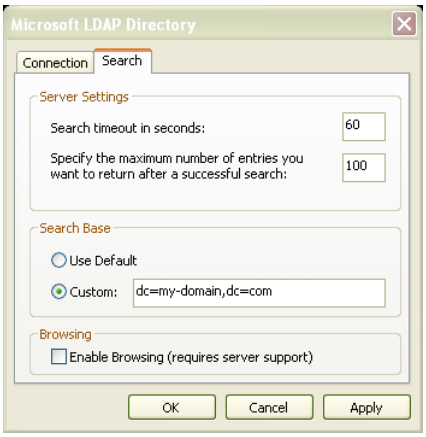
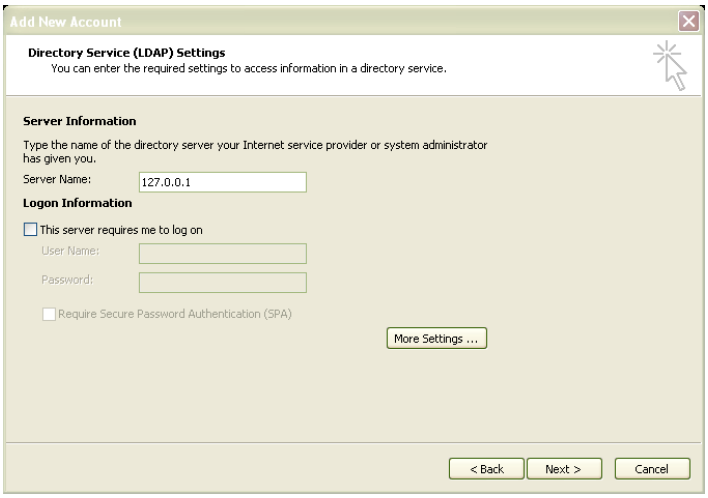
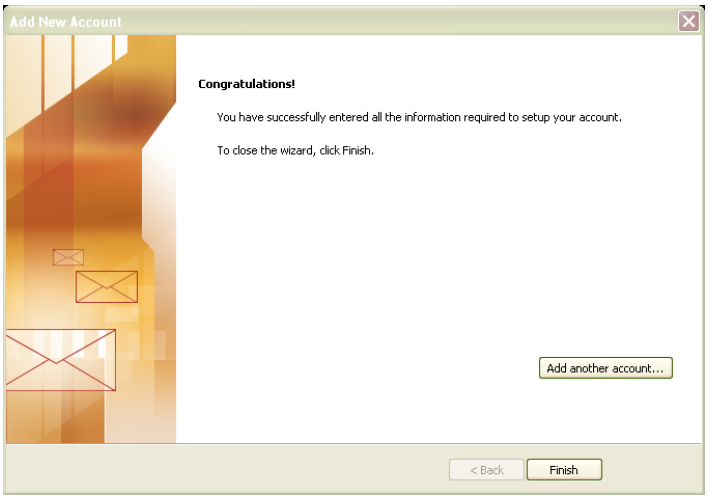


12. Click **OK**.
13. In the Add New Account dialog box, click Next.



14. Click **Finish**.



15. Restart Outlook.

APPENDIX B—FREQUENTLY ASKED QUESTIONS

Q: Why am I getting an **XML parsing error** when trying to synchronize my Contacts?

A: The most common reason for this error is due to the system not having all of the Windows Updates installed.

Q: When I synchronize from the server to Outlook, some of the events are showing up as "subscribed from *xxxxx* calendar" and are listed as READ-ONLY. Why does this happen?

A: This message is for events that have been synchronized from any calendars that are subscribed on the calendar server. Outlook does not understand the functionality of subscribing to another calendar. To bridge this gap between the server and Outlook, all events from a subscribed calendar are marked with the message.

Q: I changed an event time on the calendar server and synchronized to Outlook. Why didn't I see Outlook display the new time?

A: The Outlook calendar needs to be refreshed. Click on a different Outlook shortcut and then click back to the calendar view to refresh the display.

Q: I can't install ConnectR. Does ActiveSync have anything to do with my inability to install ConnectR?

A: It could. ActiveSync makes Outlook appear as if it is perpetually open. If you turn off your PocketPC, ActiveSync will go dormant—thus allowing you to install ConnectR. Also, make sure you do not have a scheduled or timed synchronization, as this would enable Outlook, possibly in the middle of the installation.

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INDEX

access privileges to calendar
  denying 5
  granting 5
all-day events
  scheduling for someone else 20
  scheduling your own 9
calendar
  Date Navigator 6
  denying access to yours 5
  granting access to others 5
  viewing another person's 6
  viewing another person's as a delegate 16
  viewing your own 6
canceling meetings or all-day events
  for someone else 23
  your own 12
changing appointments, events or meetings
  for someone else 21
  your own 10
configuring, SynQ
  personal account 3
  specifying users for synchronization 4
contacts
  creating based on a received message 15
  creating based on your company address list 15
  creating manually 15
  deleting 16
  searching 16
  viewing your list 16
meeting requests, replying
  for someone else 23
  for yourself 12
meetings, one-time
  scheduling on behalf of someone else 18
  scheduling your own 8
meetings, recurring
  scheduling for someone else 19
  scheduling your own 9
personal account, setting up 3
private appointments/meetings
  about 7
  creating 12
  viewing in others' calendars 7, 17
replying to meeting requests
  on behalf of someone else 23
  on behalf of yourself 12
scheduling all-day events
  for someone else 20
  your own 9
scheduling one-time meetings
  for someone else 18
  your own 8
scheduling recurring meetings
  for someone else 19
synchronizing
  data fields, explanation 25
  from scratch, calendar 25
  manually 25
  overview 24
  problems, reporting 24
  updating the SynQ add-in 25
SynQ
  configuration overview 3
  displaying main configuration tab 3
  installing 2
  specifying users to synchronize 4
  updating the add-in 25
system requirements 2
tasks
  assigning to someone else 13
  creating 13
  delegating 14
  marking as complete 14
  responding to one assigned to you 14
  sending status reports 14
  viewing another person's 14
viewing
  another person's calendar 6
  another person's calendar as a delegate 16
  another person's tasks 14
  contacts list 16
  your calendar 6
Windows
  ensuring you have the latest updates 2
  supported version 2

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