



Microsoft Outlook 2003 and the SynQ 2.4.1 Add-in

Installing, Configuring and Using

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Your work environment features Mirapoint mail and calendar servers, the Microsoft Outlook desktop client (rather than the Mirapoint Corporate Edition client), and the Outlook SynQ 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 SynQ add-in.

This guide documents procedures specifically for the following environment:

- Microsoft Outlook 2003
- SynQ add-in 2.4.1 (build 2.4.1.77)
- Calendar server running Mirapoint Operating System 3.8.1 and the D3_8_1_webcal_2 patch

Note: In the remaining space within this column, insert key user information specific to your environment (host name, name and number of person to contact for assistance, etc.).

SYSTEM REQUIREMENTS

SynQ requires the following:

- A PC running Microsoft Windows XP.
- Microsoft Outlook 2003 installed on your PC.
Note: Microsoft Office 2003 Service Pack 2 is required.
- 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 SynQ to operate, Outlook 2003 must not be configured with a Microsoft Exchange server.

Note: The instructions in this guide are restricted to Microsoft Outlook Office 2003 Service Pack 2 running under Windows XP. However, the SynQ add-in also works with Windows 2000 and Microsoft Office 2000/2002.

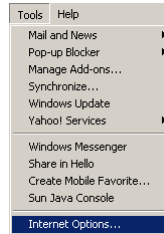
ENSURING TWO IMPORTANT CONDITIONS

In addition to ensuring that you have the correct operating system and version of Outlook to run Outlook SynQ, you must do the following:

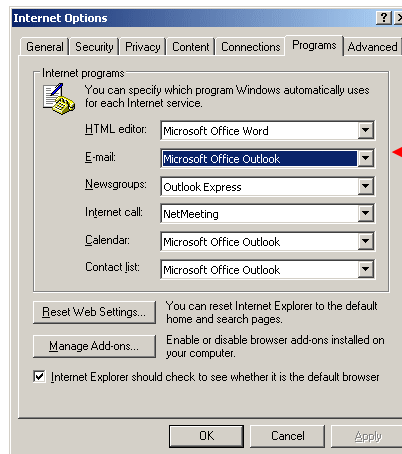
- Ensure that Microsoft Outlook is the default Internet Email program.
- Ensure that you have the latest Windows updates.

Ensuring That Outlook is Your Default Internet Email Program

1. Launch a Microsoft Internet Explorer browser.
2. Click **Tools > Internet Options**.



3. Click the Programs tab.
4. Check to make sure that **Microsoft Office Outlook** is selected in the E-mail field.



If it isn't, click the down arrow ▼ and select **Microsoft Office Outlook** in the drop-down menu.


5. Click **OK**.

Ensuring That You Have the Latest Windows Updates

You should have the latest Microsoft Windows XP updates installed on your PC. 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 SYNQ 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 .
2. Click **Options**.
3. In the Options window, click the **SynQ** link.
The Outlook SynQ Add-in page displays.

Outlook SynQ Add-in 2.4

The SynQ add-in for Microsoft Outlook® synchronizes calendar events, to-do/task items, and address book contacts between this calendar server and Outlook. Once Outlook SynQ is installed, the add-in runs from within Outlook.

This version of Outlook SynQ fixes several issues. For details, see the release notes: [relnotes.html](#)

System Requirements

- IBM-compatible 486 PC or higher
- 20 MB available disk space
- Microsoft Windows® 2000 or XP
- Microsoft Outlook 2000, 2002, or 2003

Important!
Outlook 2000 must be installed with Internet (IMC) Mode, Corporate (CW) Mode is not supported. Outlook 2002/2003 must not be configured with a Microsoft Exchange server in order for Outlook SynQ to operate.

- Administrator privileges on your PC
- Network access to your calendar server
- A valid user account on your calendar server


Before Installing Outlook SynQ

Log into your calendar server's web interface at least once and set your calendar-server preferences; in particular, make sure your time zone is set correctly. Contact your system administrator for details.

Make sure that your default e-mail client is Microsoft Outlook 2000, 2002, or 2003:

1. From the Outlook **Help** menu, choose **About Microsoft Office Outlook**. If the version reported is not Outlook 2000, 2002, or 2003, you must upgrade to one of these versions before using Outlook SynQ. Make sure that Microsoft Outlook has been installed, configured, and run at least once for each user prior to running Outlook SynQ.
2. From the Windows **Start** menu, click **Settings > Control Panel**. Then double-click **Internet Options** in the

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

Once SynQ is installed, the SynQ toolbar icon  appears in Outlook's standard toolbar. Launch Outlook and then click **View > Toolbars > Standard** to view the standard toolbar.

CONFIGURING SYNQ

There are four items that you can configure:

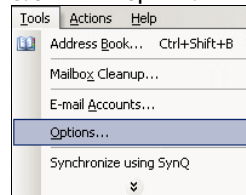
- **Personal account**—You set up your own synchronization options. At minimum, you need to do this task to use SynQ. (Otherwise, there will be nothing to synchronize.) The other three items can be configured at your convenience or whenever you want to take advantage of the benefits they provide.
- **Automatic conflict resolution**—You specify a default “winner” (Outlook or the calendar server) for every conflict that Outlook SynQ encounters.
- **Background synchronization**—You setup SynQ to automatically synchronize your data at a specific interval. This feature eliminates the need for you to manually synchronize your data each time you do something involving your calendar, contacts, or tasks.
- **Users to synchronize**—Setup SynQ 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 events.

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

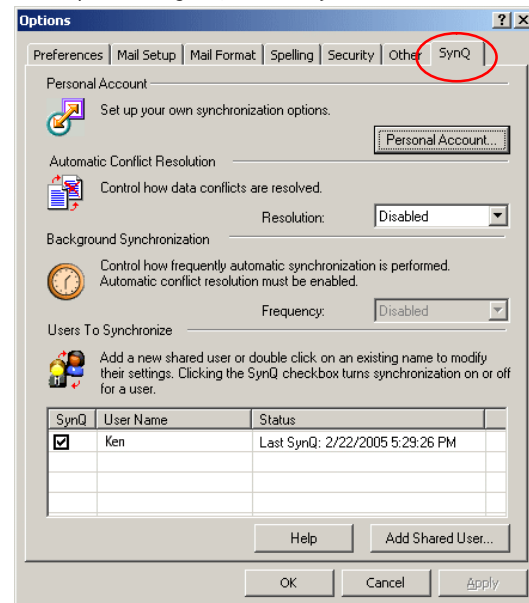
Displaying the SynQ Tab

To display the SynQ tab, do the following:

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



3. In the Options dialog box, click the **SynQ** tab.



4. Once you've completed the configuration of the four items (Personal Account, Automatic Conflict Resolution, Background Synchronization, and Users to Synchronize), click **OK**.

Setting Up Your Personal Account

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

2. In the Personal Account section, complete the following fields:
 - o **User Name**—Enter your user name on the calendar server.
 - o **Password**—Enter your calendar server password.
 - o **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.
 5. Optionally, click the **Use Secure Connection** option.
 6. Click **Verify...**.
- The SynQ installer checks to make sure the personal account information you entered is valid.
7. In the Confirm - SynQ dialog box, click **OK**.

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 - SynQ 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**.

8. In the Items to Synchronize section, select any or all of the items to synchronize:
 - o **Calendar**—If you select this item, make sure you click the down arrow and select the appropriate item from the drop-down list.
 - o **Calendar attachments**
 - o **Tasks**
 - o **Contacts**
9. In the Synchronization Direction section, choose the appropriate directional option. (**Note:** Synchronization direction determines the direction of data flow between Outlook and your calendar server. This data-flow setting applies to sync operations run after the initial synchronization between the two data sources has completed.) There are three directional options available:
 - o Selecting the **Outlook to Server** checkbox tells SynQ to propagate changes made in Outlook to your calendar server. Your server will be updated to

reflect changes that were made in Outlook after the initial synchronization.

- o Selecting the **Server to Outlook** checkbox tells SynQ to propagate changes made in your calendar server to Outlook. Outlook will be updated to reflect changes that were made to your calendar server account after the initial synchronization.
- o Selecting both the **Outlook to Server** and **Server to Outlook** checkboxes tells SynQ to propagate changes made to the calendar server and/or Outlook to both data sources. This two-way synchronization ensures that the data in Outlook and the calendar server is identical.

What You Need to Know

With the one-way synchronization options (**Outlook to Server** and **Server to Outlook**), only changes made to one data source following the initial synchronization are pushed to the other one (the target or recipient source). Consequently, if you delete items from the target any time after the initial synchronization completed, those deleted items will not appear in the other data source following subsequent one-way synchronizations.

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

Setting Up Automatic Conflict Resolution

You can setup SynQ to resolve conflicts automatically—thus avoiding the need to deal with the **Conflict detected - SynQ** dialog box each time a conflict is detected. A conflict occurs when the same item has been changed in both the calendar server and Outlook since the last successful synchronization.

To setup automatic conflict resolution:

1. If necessary, display the SynQ tab. (See *Displaying the SynQ Tab*).
2. In the Automatic Conflict Resolution section, click the down arrow and select a “winner” whenever SynQ encounters a conflict:
 - o **Favor Outlook**
 - o **Favor Server**

Whenever a conflict is detected during synchronization, SynQ will automatically overwrite either the calendar server or Outlook item, depending on your Automatic Conflict Resolution selection.

What You Need to Know

By default, the drop-down list has **Disabled** selected. Disabling automatic conflict resolution causes the **Conflict detected - SynQ** dialog box to appear each time SynQ encounters a conflict—thus requiring your intervention to determine the winner. Selecting **Favor Outlook** or **Favor Server** from the drop-down box, speeds up the synchronization process by always determining the winner according to your indicated preference.

4. Click **OK**.

Setting Up Automatic Synchronization

You can setup Outlook SynQ to perform periodic synchronizations automatically in the background. This **Background Synchronization** feature works in conjunction with the Automatic Conflict Resolution setting.

To setup background synchronization:

1. Complete the steps in the *Setting Up Automatic Conflict Resolution* procedure.
2. In the Background Synchronization section, click the **Frequency** down arrow and then select a time increment (**15 minutes**, **30 minutes**, **1 hour**, **2 hours**, or **4 hours**).

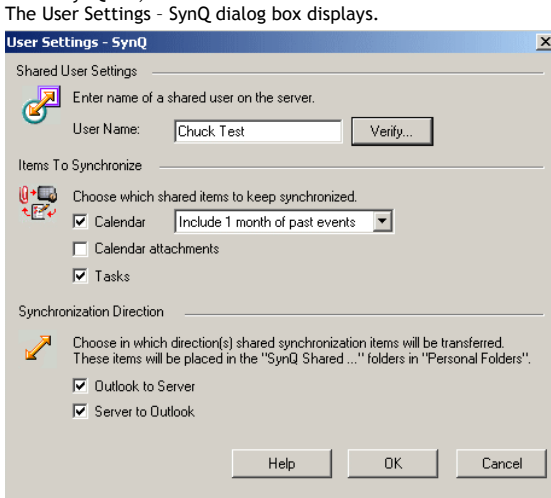
3. Click **OK**.

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.

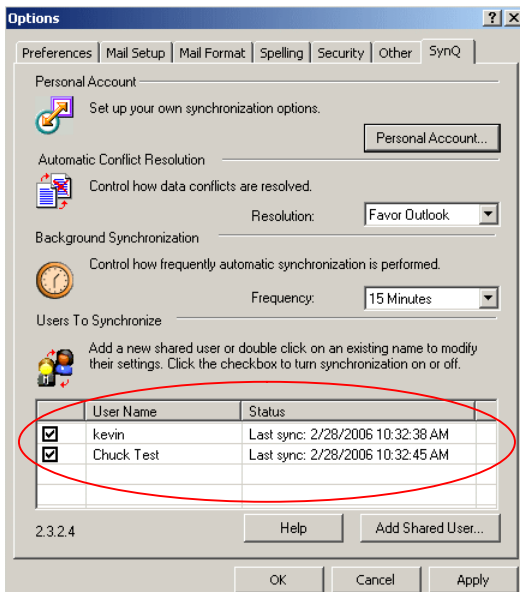
1. If necessary, display the SynQ tab. (See *Displaying the SynQ Tab*).
2. On the SynQ tab, click **Add Shared User...**.



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

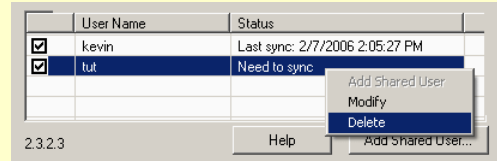


6. In the **Items to Synchronize** section, select any or all of the items to synchronize:
 - o **Calendar**—If you select this item, make sure you click the down arrow and select the appropriate item from the drop-down list.
 - o **Calendar attachments**
 - o **Tasks**
7. Click **OK** in the **User Settings - SynQ** dialog box. The shared user displays displayed in the **Users to Synchronize** list on the SynQ tab.

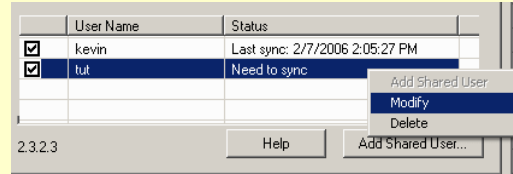


What You Need to Know

- You can turn off synchronization for a shared user by deselecting (unchecking) the checkbox to the left of the name.
- To remove a shared user, right-click the name and then click **Delete**.



- To change the synchronization settings for a shared user, right-click the name and then click **Modify**.



The **User Settings - SynQ** dialog box displays, and you can change the settings for the shared user.

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

CONFIGURING ACCESS PRIVILEGES

Once you've installed and configured SynQ, 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 SynQ installed.

Access control permissions allow you to limit, or allow, users on your system to act on your calendar. If you are going to 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. Click **Sharing Controls**.



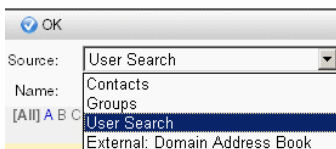
4. You can set access permissions for **Anyone** and/or specific users. **Anyone** is a default user name that specifies permissions for all users. For example, if you grant **Anyone** permission to modify your calendar events, then all users will be able to do so. But by specifying access permissions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

Complete the following steps to identify specific users:

- a. Click the **User** link.

User: Add

- b. In the Find Users popup window, specify the address book for your search by clicking the **Source** drop-down list. You can select from the following:
 - o **Contacts:** Your contacts database.
 - o **Groups:** Your contact groups database.
 - o **User Search:** Users on your system.



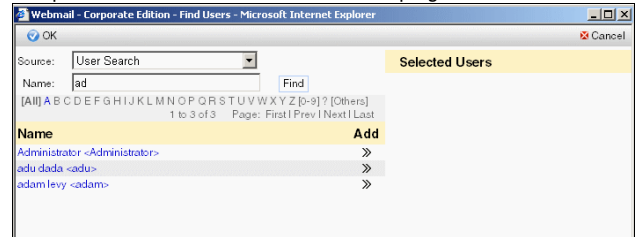
- c. Enter a full or partial name in the **Name** text box. Or if you want your search results to list all the users in the source database you specified (in Step b), leave the text box blank.

Source: User Search
 Name: ad

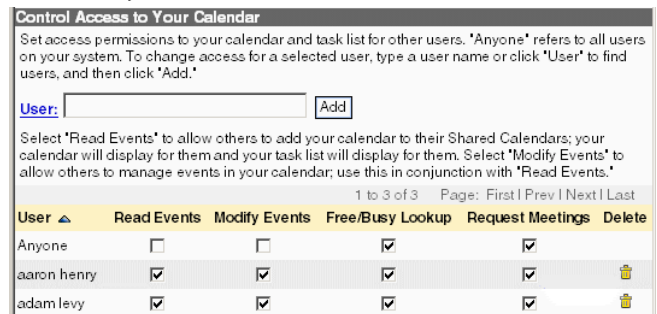
- d. Click **Find**.

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 person's name link.
 Or
 If you want to specify more than one user, click **Add >>** for each person and then click **OK** once you're done identifying users.
 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:
 - o **Read Events:** Determines who can read your event data; deselected by default. If you select this option, other users can view your calendar.
 - o **Modify Events:** Determines who can modify or delete your event data; deselected by default. If you select this option, other users can view and modify your calendar. If you plan to delegate control of your calendar to another person, you need to select this option.
 - o **Free/Busy Lookup:** Determines who can access your schedule data; selected by default. This allows people to determine your availability if they want to invite you to a meeting.
 - o **Request Meetings:** Determines who can add you to their meetings; selected by default.



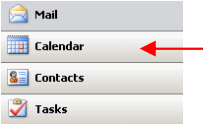
6. Once you've set the permissions, click **Apply**.
7. Click **Close** to dismiss the Options window.

Denying People Access to Your Calendar

1. Launch Corporate Edition. (If necessary see Step 1 in the previous procedure.)
2. Click the **Options** link, and then **Sharing Controls**.
3. Click the **Delete** icon for a specific user on your access control list.
 Or
 Edit the permissions for a specific user.
4. (Optional) Edit the permissions for the **Anyone** user.
5. Click **Close** to dismiss the Options window.

VIEWING CALENDARS

To access the Outlook Calendar, click the Calendar tab in the navigation pane.



Viewing Your Calendar

- In the navigation pane, click Calendar.
- In the View menu, click **Arrange By > Current Views** and then choose a viewing option:
 - Day/Week/Month** - Default view.
 - Day/Week/Month With AutoPreview** - Default view with mouse-over preview.
 - Active Appointments** - Future appointments and events.
 - Events** - All events.
 - Annual Events** - Annual events only
 - Recurring Appointments** - Recurring appointments only
 - By Category** - Appointments and events by category

What You Need to Know

- A **recurring meeting/appointment** might disappear from your calendar if it has been modified a large number of times (around 30 times or more) and Microsoft Office 2003 Service Pack 2 is not installed on your computer.
Solution: Make sure Microsoft Office 2003 Service Pack 2 is installed.
- Reminders** might disappear from calendar.
Solution: See your system administrator who can fix this problem.
- A **duplicate event** might be created under the following circumstances while running Outlook 2003 in Internet mode:
 - You have the reading pane displayed in Outlook. (To display the reading pane, click **View > Reading Pane > Bottom**.)
 - In your Outlook Inbox, you double-click a new (i.e., previously unread) meeting invitation.
- Subscribed-to events** setup in Corporate Edition do not display in Outlook.
Solution: Use Outlook to setup all events.

Displaying Dates

In Day/Week/Month view, click the following buttons in the Calendar toolbar to display a particular date view:

	Current day
	One calendar day
	Monday through Friday
	One calendar week
	One calendar month

You can also use the following keystrokes to display 1 to 10 calendar days:
ALT+1, ALT+2 ... ALT+0

Using the Date Navigator

January 2006						
S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

In Day/Week/Month view, the Date Navigator appears either on the navigation pane or above the Calendar TaskPad to the right of the calendar. A box signifies the current date; dates with meetings/appointments appear in boldface. Do the following to alter the Date Navigator display:

- View a different month** - Click and to view the previous or next month, respectively.
- View a specific date** - In the Date Navigator, click the desired date, or click and drag to view

consecutive dates.

View a full week - Place your cursor to the left of the week you want to view, then click when the pointer changes to a right-pointing arrow.

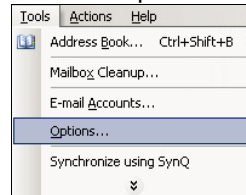
View two or more months - Click and drag the divider bar to widen the Date Navigator panel until the desired number of months display.

Viewing Another Person's Calendar

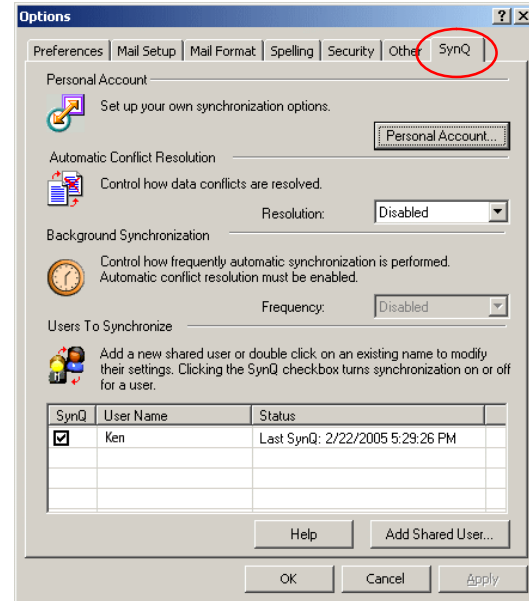
What You Need to Know

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](#).

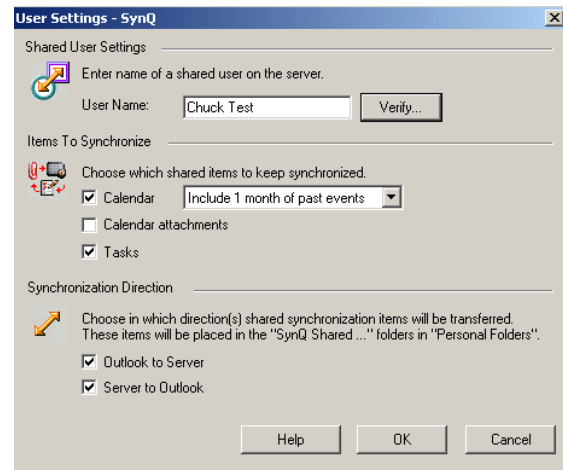
- Launch Microsoft Outlook.
- Click **Tools > Options**.



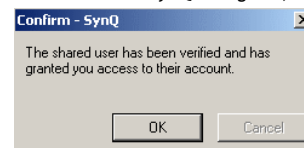
- In the Options dialog box, click the **SynQ** tab.



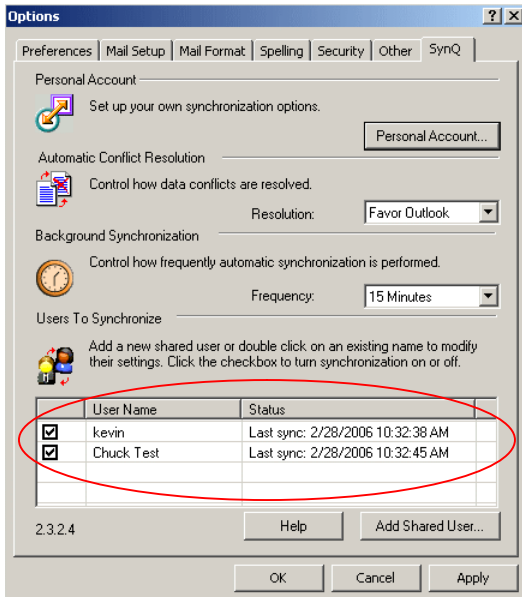
- On the SynQ tab, click **Add Shared User...**. The **User Settings - SynQ** dialog box displays.



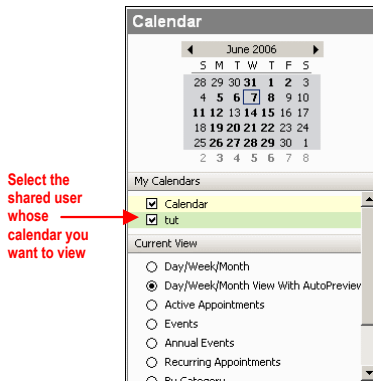
- In the **User Name** field, enter the name of another user who also has an account on your calendar server.
- Ensure that the user name is valid by clicking .
- In the **Confirm - SynQ** dialog box, click **OK**.



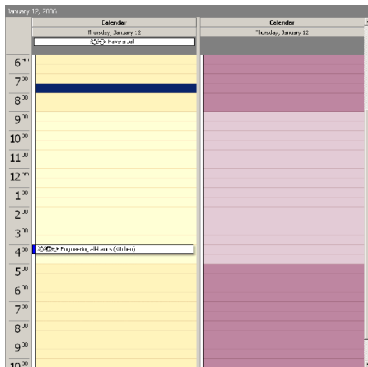
8. In the Items to Synchronize section, select any or all of the items to synchronize:
 - o **Calendar**—If you select this item, make sure you click the down arrow ▼ and select the appropriate item from the drop-down list.
 - o **Calendar attachments**
 - o **Tasks**
9. Click **OK** in the User Settings - SynQ dialog box. The shared user displays displayed in the Users to Synchronize list on the SynQ tab.



10. Click **OK** in the Options dialog box.
11. 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.



What You Need to Know

- **A recurring meeting/appointment** might disappear from your calendar if it has been modified a large number of times (around 30 times or more) and Microsoft Office 2003 Service Pack 2 is not installed on your computer.
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 2. In your Outlook Inbox, you double-click a new (i.e., previously unread) meeting invitation.
- **Subscribed-to events** setup in Corporate Edition do not display in Outlook.
Solution: Use Outlook to setup all events.

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.

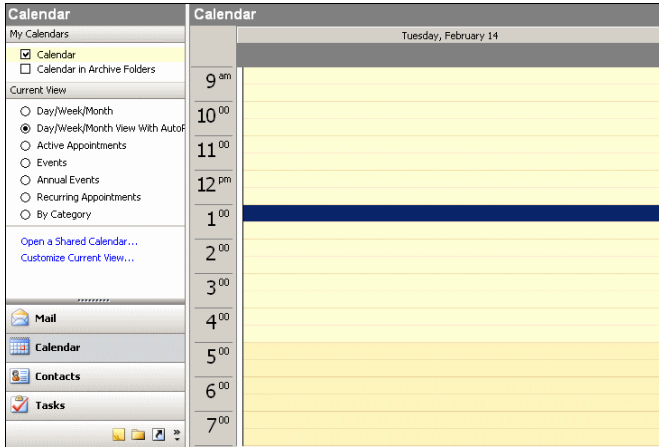
Events - Activities that lasts 24 hours or longer.

What You Need to Know

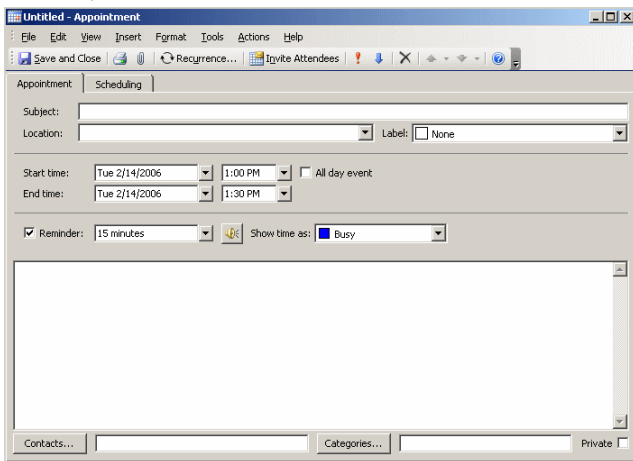
- You cannot use Corporate Edition distribution lists setup by your system administrator when scheduling meetings in Outlook. As a workaround, you could use Corporate Edition and the administrator-setup distribution lists to schedule the meeting, and then use Outlook from that point on.
- Free/busy information 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 setup 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

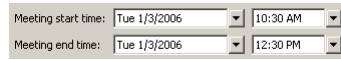
- In the navigation pane, click **Calendar**.
- In the Outlook toolbar, click the **Day** or **Work Week** view modes to see detailed time increments.
- In your calendar, double-click the time slot when you want your meeting to begin.



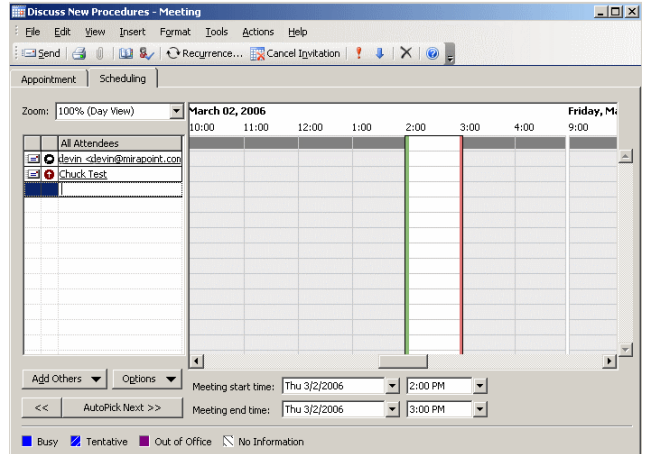
- In the Appointment window, enter your meeting details (such as Subject and comments).



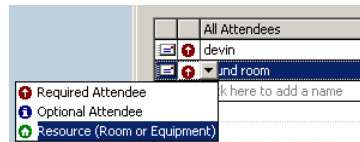
- If necessary, use the **Meeting start time** and **Meeting end time** drop-down lists to fine-tune the meeting time.



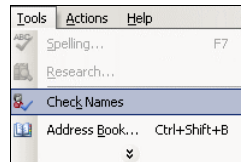
- Click **Scheduling** (Scheduling tab).
- In the **All Attendees** column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



- 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.



- Click **Tools > Check Names** to check the validity and free-busy times of the attendees and resources you entered.



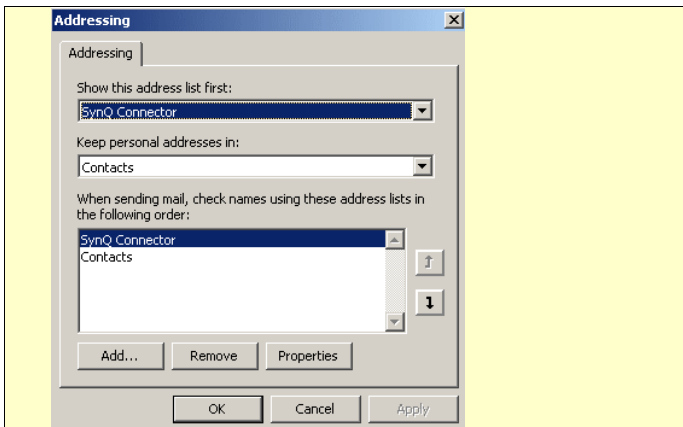
The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

Troubleshooting: Free/Busy Information

Here are some things you can do if free-busy times aren't available.

- If you can't find other users or perform free/busy lookups, it's possible that lookups are using the wrong directory service. Check to see which directory service is currently in use:
 - In Outlook, select **Tools > Address Book**.
 - In the Address Book window, choose **Tools > Options**.
 - On the Addressing tab, do the following:
 - Make sure **SynQ Connector** displays in the **Show this address list first** field. If it isn't, click the down arrow and choose **SynQ Connector** from the drop-down list.
 - Make sure **SynQ Connector** is listed first in the **When sending mail, check names using these address lists in the following order** field. If it isn't, click **SynQ Connector** and click the up positional arrow as appropriate.

(continued)



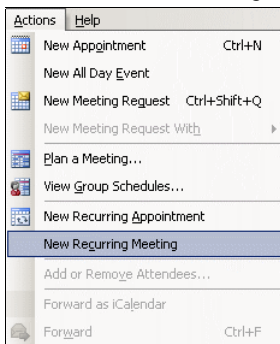
- Try the Outlook keyboard shortcut **Control-K** to force a lookup and redisplay of free/busy data. Outlook uses a cache of users' free/busy times. At startup this cache is empty. When an event's schedule is viewed for the first time, Outlook requests the free/busy information for each attendee and 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.

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

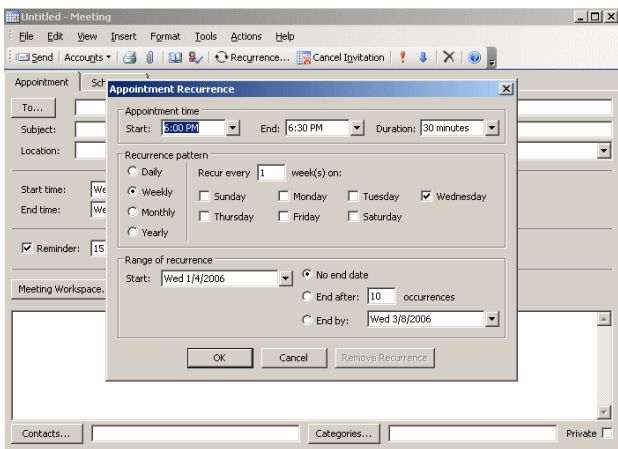
11. At this point it is advisable that you click to perform a manual synchronization. This will save your meeting request to the calendar server immediately. Note: You should do this even if you have automatic synchronization setup (as explained in Setting Up Automatic Synchronization). Someone else could conceivably book some or all of your resources and desired attendees during the inherent lag between the time you complete your meeting request and the time when auto-synchronization occurs.

Scheduling a Recurring Meeting

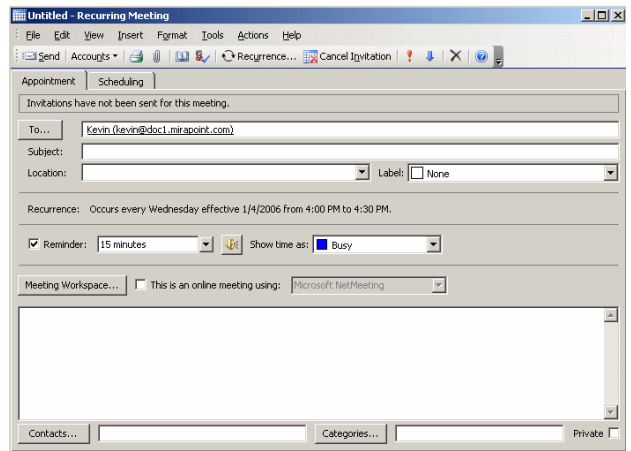
- In the navigation pane, click **Calendar**.
- Click **Actions > New Recurring Meeting**.



The Outlook Meeting window opens with the Appointment Recurrence dialog box in the foreground.




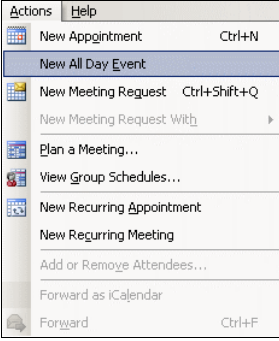
- In the Appointment Recurrence dialog box, enter the meeting and recurrence details and then click **OK**.
- In the Meeting window, enter your meeting details (such as Subject and comments).



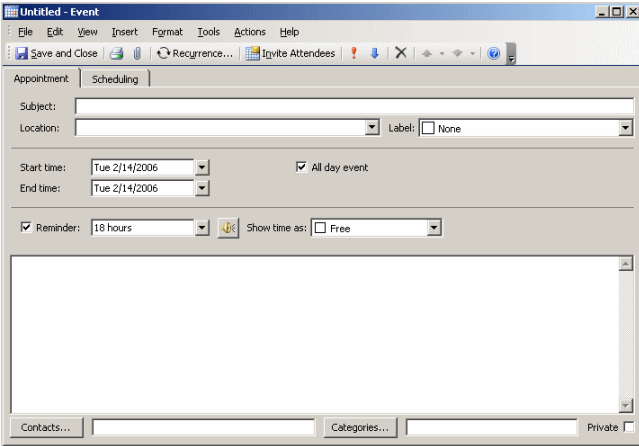
5. Complete steps 5-11 in the [Scheduling a Meeting](#) procedure.

Scheduling an All-Day Event

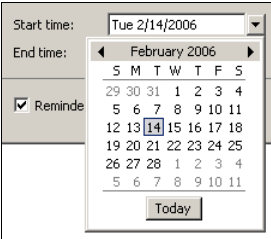
1. In the navigation pane, click  Calendar....
2. Click **Actions > New All Day Event**.



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



3. If necessary, change the event's Start time and End time by clicking the appropriate down arrow and selecting a different day from the calendar.



4. Complete steps 5-11 in the [Scheduling a Meeting](#) procedure.

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](#)

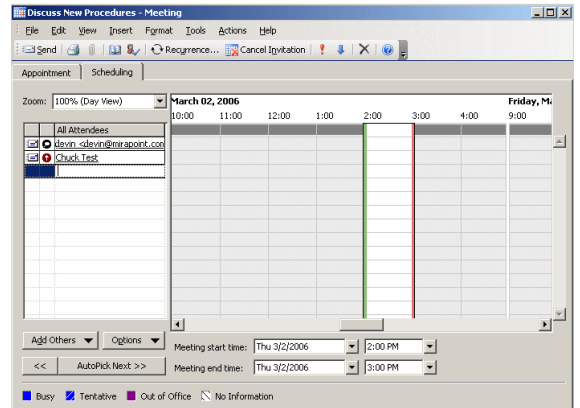
Refer to the appropriate procedure below for your specific situation.


What You Need to Know

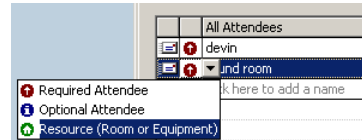
Attendees can make changes to events that they do not own. However those changes will not be propagated back to the calendars of the event owner and the other attendees upon synchronization. Only the calendar of the person making the change will be affected. Additionally, if a person modifies an event 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.

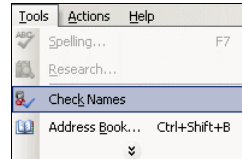
1. Open the particular appointment, event, or meeting by double-clicking the item in your calendar.
2. Do any of the following:
 - o On the Appointment tab, change the options (subject, time, etc.) as necessary.
 - o Add new attendees as appropriate, by doing the following:
 - a. Click **Scheduling** (Scheduling tab).
 - 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. Click **Tools > Check Names** to check the validity and free-busy times of the attendees and resources you entered.

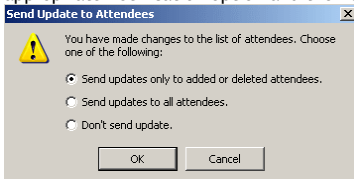


The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

If free-busy times aren't available, see [Troubleshooting: Free-Busy Information](#) in the [Scheduling a Meeting](#) procedure.

- o Delete attendees as appropriate by doing the following:
 - a. Click the Scheduling tab.
 - b. Highlight an attendee.
 - c. Press **Delete**.

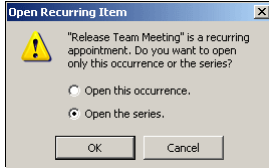
- Click **Save and Close**. Additionally, if you changed the attendee list, select the appropriate notification option and then click **OK**.



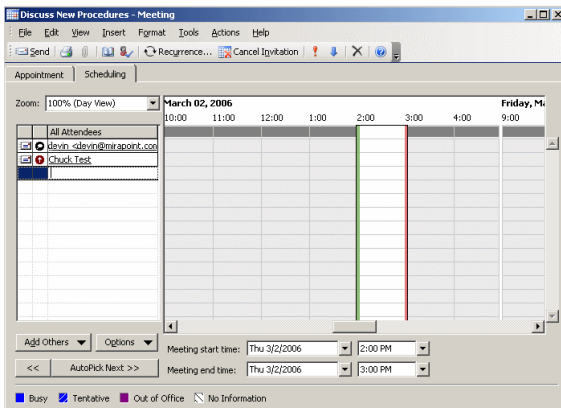
- In the Microsoft Outlook dialog box, specify whether you want to send a message to the attendees notifying them of your update.

Changing options for an entire series.

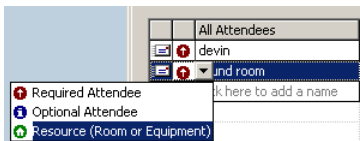
- Open the particular appointment, event, or meeting by double-clicking the item in your calendar.
- Click **Open the series** and then click **OK**.



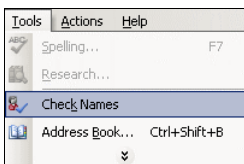
- Do any of the following:
 - On the Appointment tab, change the options (subject, time, etc.) as necessary.
 - Add new attendees as appropriate, by doing the following:
 - Click **Scheduling** (Scheduling tab).
 - In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



- 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.



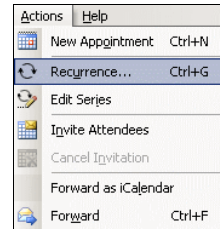
- Click **Tools > Check Names** to check the validity and free-busy times of the attendees and resources you entered.



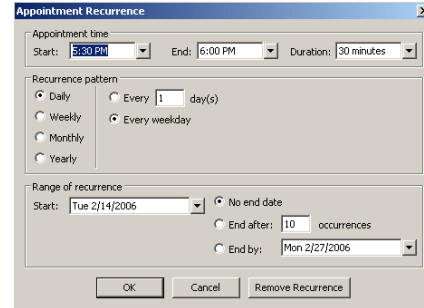
The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

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:
 - Click the Scheduling tab.
 - Highlight an attendee.
 - Press **Delete**.
- Change recurrence options
 - In the Recurring Appointment window, click **Actions > Recurrence**.



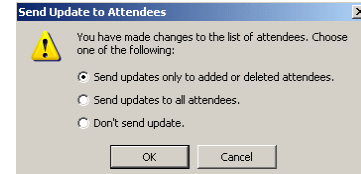
- Change the options, such as time, recurrence pattern, or range of recurrence, that you want to change.



- Click **OK**.

- Click **Save and Close**.

Or
If you changed attendee list, select the appropriate notification option and then click **OK**.



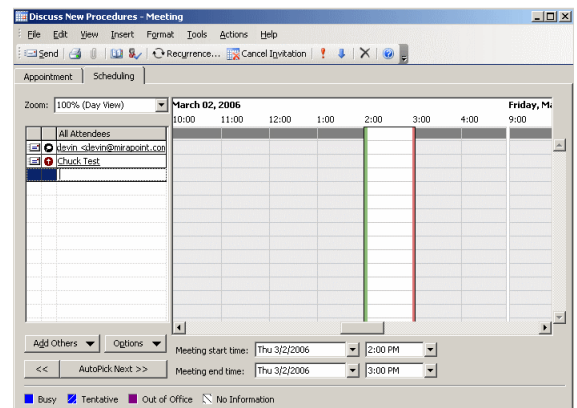
- In the Microsoft Outlook dialog box, specify whether you want to send a message to the attendees notifying them of your update.

Changing options for one item that is part of a series

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

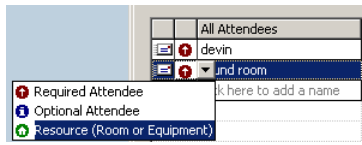


- Do any of the following:
 - On the Appointment tab, change the options (subject, time, etc.) as necessary.
 - Add new attendees as appropriate, by doing the following:
 - Click **Scheduling** (Scheduling tab).
 - In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.

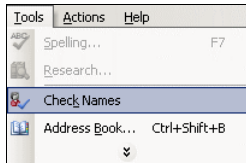


- Optionally, enter the names of one or more resources. Do this if you want to check the availability of a resource such as a conference room and to reserve it for your meeting. You can also click **+** next to the

resource name and then specify Resource (Room or Equipment) in the drop-down list.



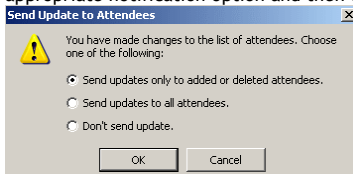
- d. Click **Tools > Check Names** to check the validity and free-busy times of the attendees and resources you entered.



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.

- o Delete attendees as appropriate by doing the following:
 - a. Click the Scheduling tab.
 - b. Highlight an attendee.
 - c. Press **Delete**.
4. Click **Save and Close**. Additionally, if you changed the attendee list, select the appropriate notification option and then click **OK**.



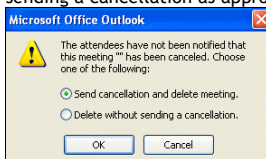
5. In the Microsoft Outlook dialog box, specify whether you want to send a message to the attendees notifying them of your update.

Canceling a Meeting or All-Day Event

Only the person who setup 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 setup:

1. Open the specific meeting by double-clicking the item in your calendar.
2. From the **Actions** menu, select **Cancel Meeting**.
3. In the dialog box, click **Send cancellation and delete meeting** or **Delete without sending a cancellation** as appropriate.



4. Click **OK**.

REPLYING TO MEETING REQUESTS

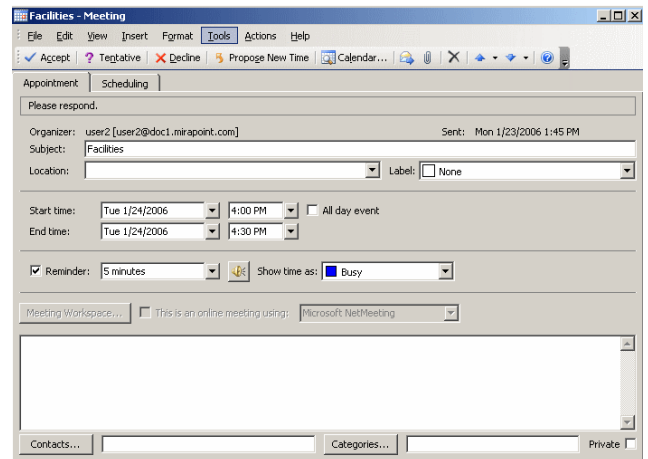
What You Need to Know

- The "Tentative" meeting request response option is not supported in the Outlook-Mirapoint Corporate Edition environment. **Accept** and **Decline** are valid responses. Deleting a meeting request is the same as declining it.

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 **Mail**.
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. Click the SynQ icon to perform a manual synchronization.
5. Display your calendar by clicking **Calendar** 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 **Calendar...**
8. Return to the open meeting request window.
9. Do one of the following as appropriate:
 - o **Accept the meeting request:**
 - a. Click **Accept**.
 - b. Select a response option in the dialog box.
 - c. Click **OK**.

If you selected **Edit the response before sending**, enter your response details in the Accepted window and then click **Send**.
 - o **Decline the meeting request:**
 - a. Click **Decline**.
 - b. Select a response option in the dialog box.
 - c. Click **OK**.

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

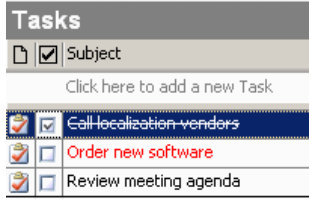
MANAGING YOUR TASKS

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

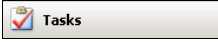

What You Need to Know

- Although there are many fields in Outlook that pertain to tasks, SynQ 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.

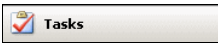
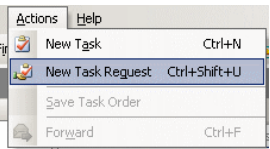

In your Tasks list, completed tasks display in strikethrough text () and overdue tasks display in red.

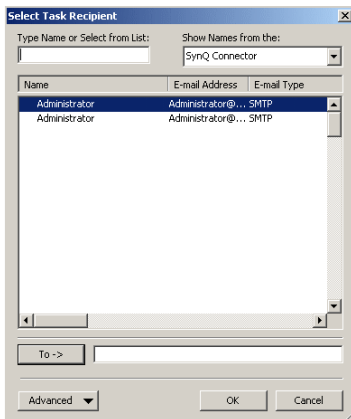


Creating a New Task

- In the navigation pane, click .
- Press **CTRL + N** or double-click a blank space.
- In the Task window, enter a name for the task in the **Subject** field.
- 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.
- Optionally, setup 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.
- Optionally, assign the task to a category by doing the following:
 - Click .
 - In the Categories dialog box, click the appropriate check box(es).
 - Click **OK**.
- Click **Save and Close**.

Assigning a Task to Someone Else

- In the navigation pane, click .
- Click **Actions > New Task Request**.
- In the Task window, click .
- In the Select Task Recipient dialog box, make sure **SynQ Connector** is displayed in the **Show Names from the** field.

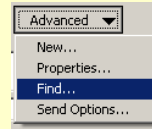


- Specify attendees by either typing a person's name in the **Type Name or Select from List** field or clicking a name in the displayed list, and then clicking **To**.

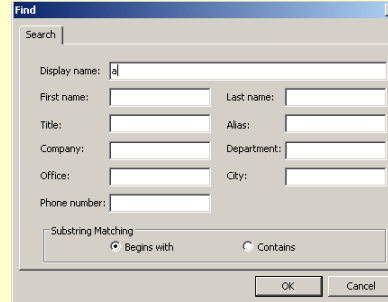
Troubleshooting: No Users Listed in Select Task Recipient Dialog Box

If no users are listed in the Select Task Recipient dialog box, do the following:

- Click **Advanced > Find**.




- In the Find dialog box, enter any relevant search criteria and then click **OK**.







- Click **OK**.




The Select Task Recipient dialog box displays with user names that match your search criteria.

- Click **OK**.
- Enter the task information as explained in steps 3-7 of *Creating a New Task*.
- Click .

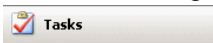

Responding to a Task Assigned to You

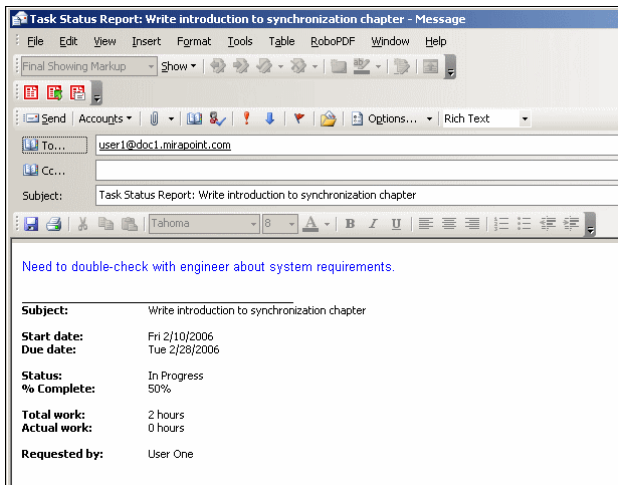
- In the navigation pane, click the **Mail** tab .
 - In the message list, double-click the task assignment (which is marked with an assigned task icon ).
 - Click  **Accept** or  **Decline** as appropriate.
 - Click **OK**.
- or
- Optionally add a comment to your reply by clicking **Edit the response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

Delegating a Task Assigned to You

- In the navigation pane, click the **Mail** tab .
- In the message list, double-click the task you've accepted .
- Click  **Assign Task**.
- Complete steps 3-8 in the *Assigning a Task to Someone Else* procedure.

Sending Status Reports About a Task Assigned to You

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



6. Click Send.
7. Click Save and Close.

Marking a Task Complete

1. In the navigation pane, click Tasks.
2. Click the check box next to the task name.
Note: If the task was assigned to you by someone else and you mark it complete, the task owner can overwrite your changes.

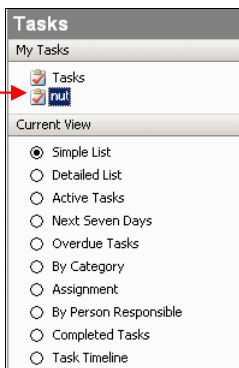
Viewing Another Person's Tasks

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.

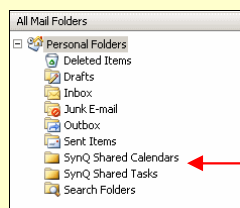
1. If you haven't done so already, setup the person whose tasks you want to view as a shared user. To do so, complete steps 1-8 in *Viewing Another Person's Calendar*.
2. Click Tasks in the Outlook navigation pane.
3. In the My Task section in the navigation pane, click the name of the user whose tasks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

Click the name of the shared user whose tasks you want to view



Tip

You can also view a shared user calendars and tasks by clicking the SynQ Shared Calendars and SynQ Shared Tasks folders listed under Outlook's personal mail folders.



In Outlook shared folders are listed in the Personal Folders tree view.

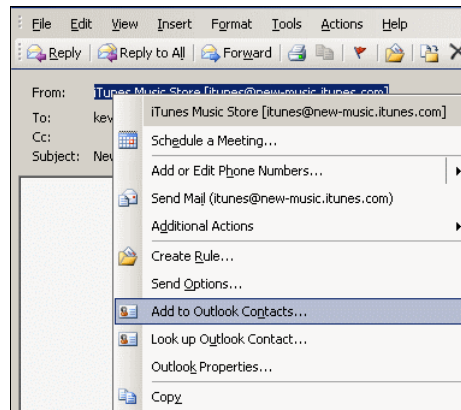
MANAGING YOUR CONTACTS

Creating a Contact Manually

1. In the navigation pane, click Contacts.
2. Click New or press CTRL+N.
3. On the General tab, enter information about your contact as appropriate.
Tips:
 - o **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.
 - o **To enter multiple phone numbers**—Click the down arrow beside any of the Phone Numbers, choose a phone number type, and then enter the number.
 - o **To enter multiple addresses**—Click the down arrow in the Addresses section, choose a type, and then enter the address in the text box.
 - o **To enter multiple email addresses**—Click the down arrow for the E-mail field; choose E-mail, E-mail 2, or E-mail 3; and then enter the email address.
4. Optionally, enter additional contact information on the Details tab.
5. Click Save and Close. If you want to save your contact and enter another one, click New.

Creating a Contact Based on a Received Message

1. In the navigation pane, click Mail.
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.

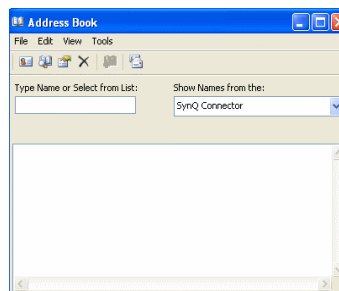


The Contact window opens with the contact's name and email address already entered.

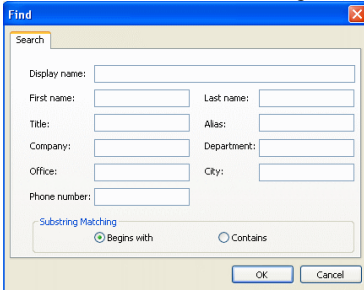
4. Follow steps 3-5 of *Creating a Contact Manually* to complete the contact entry.


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 Show Names from the drop-down list, make sure SynQ Connector is selected.




3. If no names are displayed in the list area, do the following:
 - a. Select **Tools > Find**.
 - b. On the Search tab of the Find dialog box, enter some search criteria.

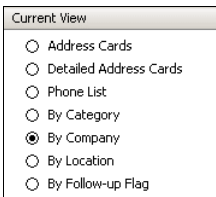


- c. Click **OK**.
Names in your corporate directory display in the list area.
4. Single-click a name in the list area, and then click .
5. Follow steps 3-5 of *Creating a Contact Manually* to complete the contact entry.



Viewing Your Contact List


You can change how your contact list is displayed.

1. In the navigation pane, click  **Contacts**.
2. Choose the desired view.




Searching for a Contact

1. In the navigation pane, click  **Contacts**.
2. In the Contacts toolbar, click .
3. In the Contacts search toolbar, type the contact name or other information (for example, company name or title) in the **Look for** box.


Look for: Search In: Contacts Find Now Clear Options X
4. Click **Find Now** or press **Enter**.
Contact names that match your search criterion are listed.
5. 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  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 SynQ add-in.

Note: In general, you should always perform a manual synchronization before performing a task on behalf of someone else—even though you have auto-synchronization enabled. To do a manual sync, click the SynQ icon  within the Outlook toolbar

What You Need to Know

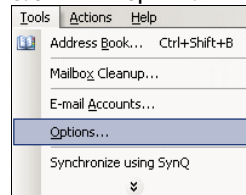
- **Outlook does not recognize distribution lists setup by your system administrator. In other words, you cannot use Corporate Edition distribution lists setup by your system administrator when scheduling meetings in Outlook.** As a workaround, you can use Corporate Edition and the administrator-setup 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 setup an event. They will display once the event is saved and sent.
- **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.
- **The Invite Attendees, Send, and Cancel Invitation buttons** in the Outlook appointment/meeting window are not accessible to delegates when initially creating an event. Those buttons will appear grayed out. This restriction is due to an incompatibility between SynQ and Microsoft Outlook.
- **Meeting invitations for events setup in Microsoft Outlook** will be read-only if they're viewed in WebMail/WebCal Corporate Edition. Invitees who use WebMail/WebCal Corporate Edition to read a meeting request for an event setup in Outlook will not be able to accept or decline the invitation in Corporate Edition. They will be able to view the meeting details in the email; however, they will not have the Accept, Decline or Propose New Time functionality that Microsoft Outlook provides.

Viewing Another Person's Calendar

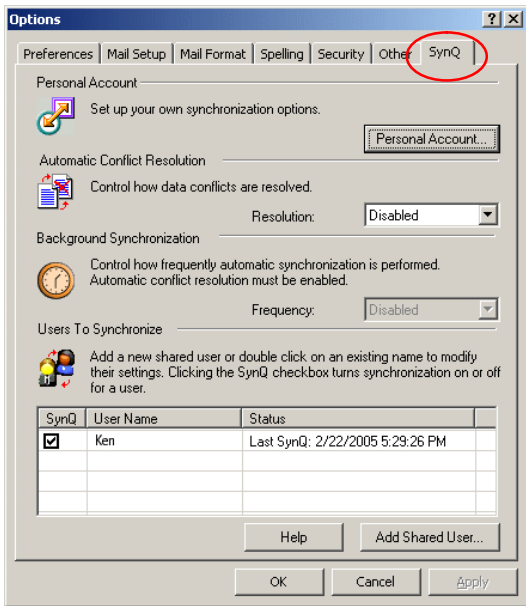
What You Need to Know

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](#).

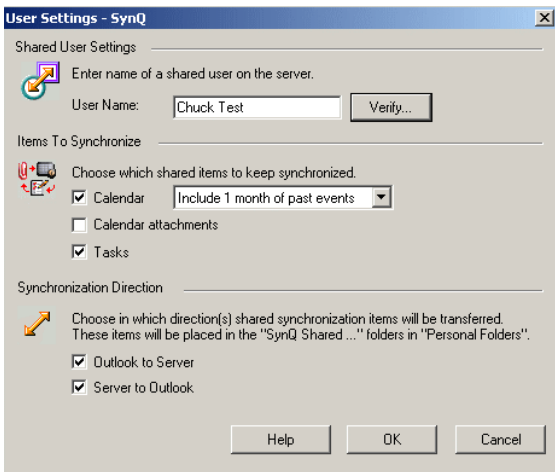
1. Launch Microsoft Outlook.
2. Click **Tools > Options**.



3. In the Options dialog box, click the **SynQ** tab.



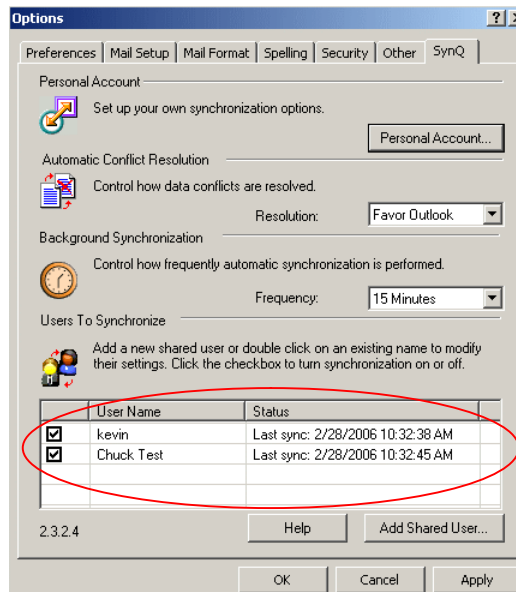
- On the SynQ tab, click **Add Shared User...**. The User Settings - SynQ dialog box displays.



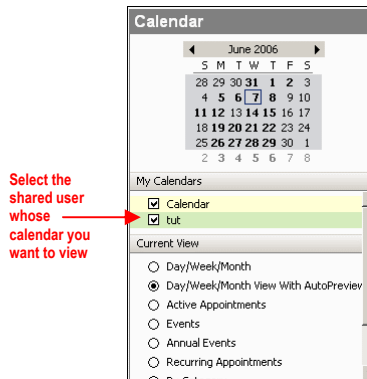
- In the **User Name** field, enter the name of another user who also has an account on your calendar server.
- Ensure that the user name is valid by clicking **Verify...**.
- In the Confirm - SynQ dialog box, click **OK**.



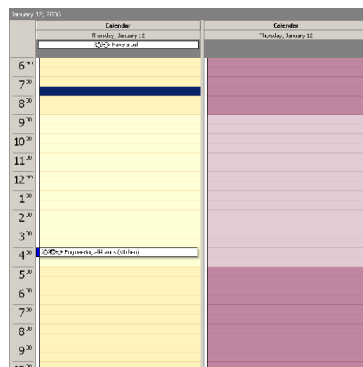
- In the Items to Synchronize section, select any or all of the items to synchronize:
 - Calendar**—If you select this item, make sure you click the down arrow and select the appropriate item from the drop-down list.
 - Calendar attachments**
 - Tasks**
- Click **OK** in the User Settings - SynQ dialog box. The shared user displays in the Users to Synchronize list on the SynQ tab.



- Click **OK** in the Options dialog box.
- In the navigation pane, click **Calendar...**.
- 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.



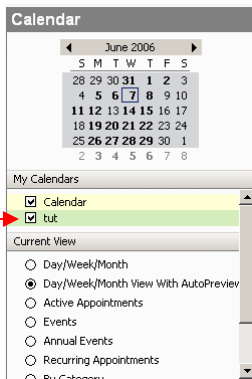
What You Need to Know

- A **recurring meeting/appointment** might disappear from your calendar if it has been modified a large number of times (around 30 times or more) and Microsoft Office 2003 Service Pack 2 is not installed on your computer.
Solution: Make sure Microsoft Office 2003 Service Pack 2 is installed.
- **Reminders** might disappear from calendar.
Solution: See your system administrator who can fix this problem.
- A **duplicate event** might be created under the following circumstances while running Outlook 2003 in Internet mode:
 1. You have the reading pane displayed in Outlook. (To display the reading pane, click **View > Reading Pane > Bottom**.)
 2. In your Outlook Inbox, you double-click a new (i.e., previously unread) meeting invitation.
- **Subscribed-to events** setup in Corporate Edition do not display in Outlook.
Solution: Use Outlook to setup all events.

Scheduling a Meeting on Behalf of Someone Else

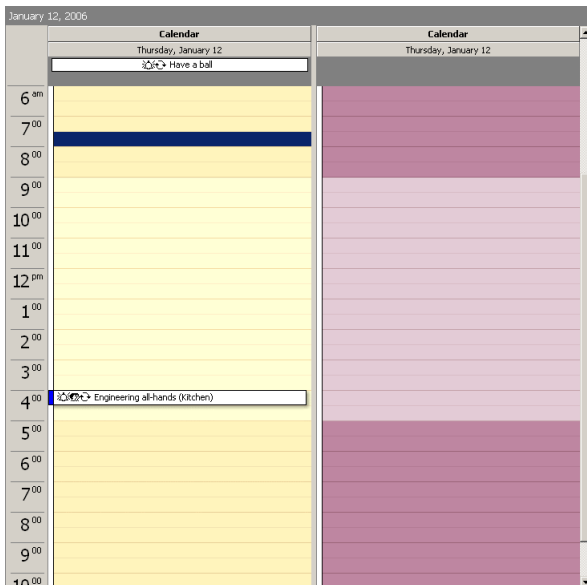
If you've been given access to another person's calendar, you can schedule meetings on their behalf.

1. In the navigation pane, click **Calendar**.
2. In Outlook toolbar, select 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 user (delegator) who has given you permission to modify his/her calendar.
Note: The "Calendar" listed first under My Calendars is your own.



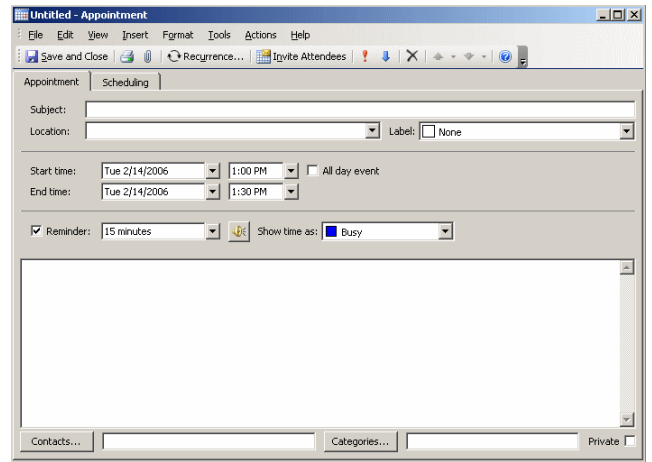
The delegator's calendar will appear next to any calendar already in the view and in a different color.

4. Double-click the desired time slot within the calendar for which you're setting up a meeting.

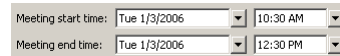


The Appointment window displays.

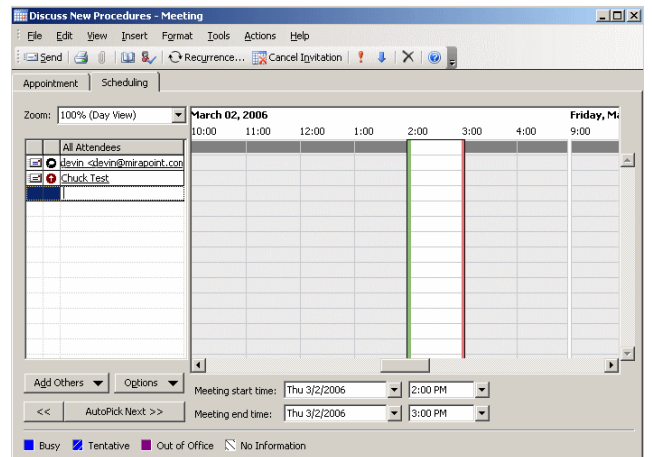
5. In the Appointment window, enter your meeting details (such as Subject and comments).



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



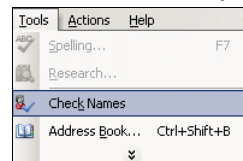
7. Click **Scheduling** (Scheduling tab).
8. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



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. Click **Tools > Check Names** to check the validity and free-busy times of the attendees and resources you entered.



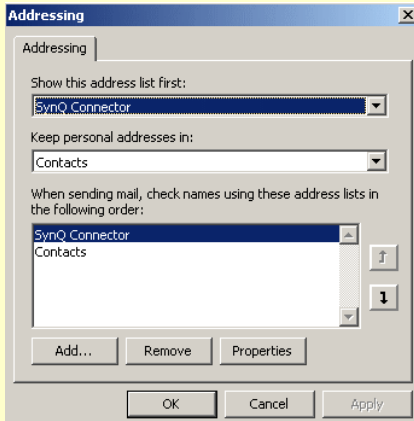
The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

Troubleshooting: Free/Busy Information

Here are some things you can do if free-busy times aren't available.

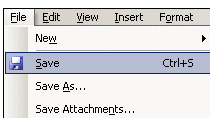
- If you can't find other users or perform free/busy lookups, it's possible that lookups are using the wrong directory service. Check to see which directory service is currently in use:
 1. In Outlook, select **Tools > Address Book**.
 2. In the Address Book window, choose **Tools > Options**.
 3. On the Addressing tab, do the following:
 - Make sure **SynQ Connector** displays in the **Show this address list first** field. If it isn't, click the down arrow ▼ and choose **SynQ Connector** from the drop-down list.
 - Make sure **SynQ Connector** is listed first in the **When sending mail, check names using these address lists in the following order** field. If it isn't, click **SynQ Connector** and click the up positional arrow ↑ as appropriate.

(continued)



- When entering attendee names on the Scheduling tab, try the Outlook keyboard shortcut **Control-K** to force a 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.

11. Choose File > Save.



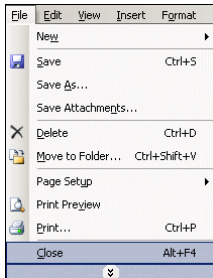
Important

The **Cancel Invitation** is not available. If you entered attendees on the Scheduling tab and then decide not to send your meeting request, do the following:

1. Return to the Scheduling tab by clicking the Scheduling tab within the Meeting window.
2. Delete your invitees from the **All Attendees** lines.

12. Close the Meeting window in one of the following ways:


- Choose **File > Close**.



- Click the Close icon  in the top right corner of the Meeting window.

Important

Don't leave the Meeting window open. Synchronization problems can occur if you do.


13. Click  to perform a manual synchronization, thus ensuring that your changes are saved immediately to the calendar server.

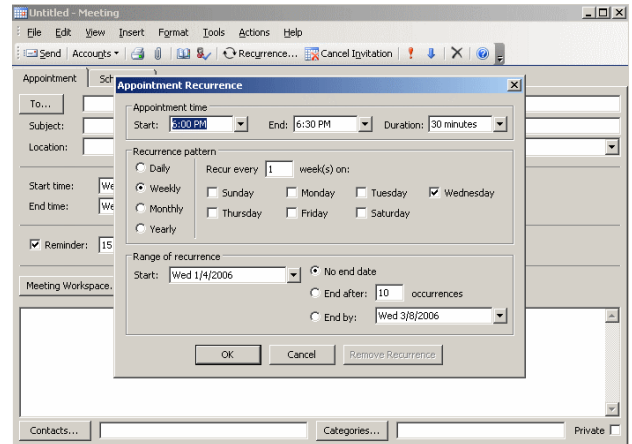
Important

- If you have read-only access to a person's calendar, you can add events that will not be synced to the server, but will remain in the person's Outlook calendar.

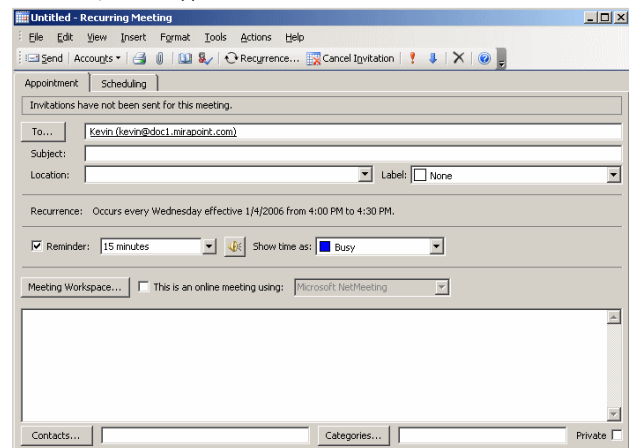
Scheduling a Recurring Meeting on Behalf of Someone Else


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

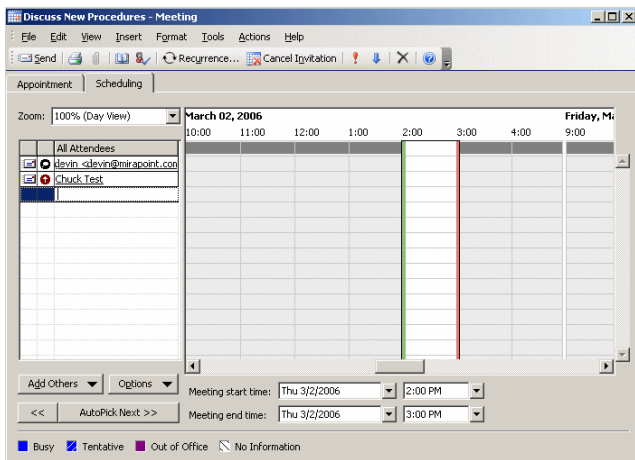
1. In the navigation pane, click  **Calendar...**
2. Click within the calendar for whom you're setting up a meeting.
3. Click **Actions > New Recurring Meeting**. The Outlook Meeting window opens with the Appointment Recurrence dialog box in the foreground.



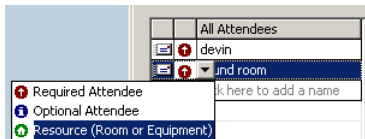
4. In the Appointment Recurrence dialog box, enter the meeting and recurrence details (including start and end times) and then click **OK**.
5. In the Meeting window, enter your meeting details (such as Subject and comments) on the Appointment tab.



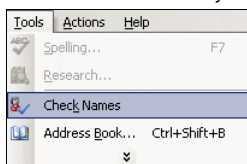
6. Click  (Scheduling tab).
7. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



- 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.



- Click **Tools > Check Names** to check the validity and free-busy times of the attendees and resources you entered.

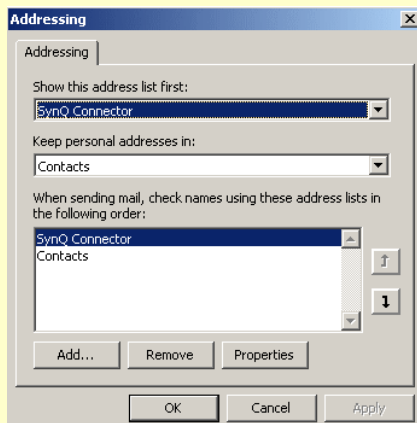


The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

Troubleshooting: Free/Busy Information

Here are some things you can do if free-busy times aren't available.

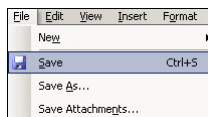
- If you can't find other users or perform free/busy lookups, it's possible that lookups are using the wrong directory service. Check to see which directory service is currently in use:
 - In Outlook, select **Tools > Address Book**.
 - In the Address Book window, choose **Tools > Options**.
 - On the Addressing tab, do the following:
 - Make sure **SynQ Connector** displays in the **Show this address list first** field. If it isn't, click the down arrow and choose **SynQ Connector** from the drop-down list.
 - Make sure **SynQ Connector** is listed first in the **When sending mail, check names using these address lists in the following order** field. If it isn't, click **SynQ Connector** and click the up positional arrow as appropriate.



(continued)

- While entering attendee names on the Scheduling tab, try the Outlook keyboard shortcut **Control-K** to force a 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.

- Choose **File > Save**.



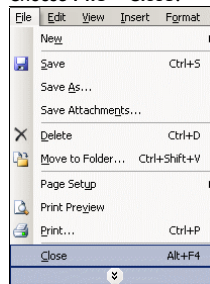
Important

The **Cancel Invitation** is not available. If you entered attendees on the Scheduling tab and then decide not to send your meeting request, do the following:

- Return to the Scheduling tab by clicking the Scheduling tab within the Meeting window.
- Delete your invitees from the **All Attendees** lines.

- Close the Meeting window in one of the following ways:

- Choose **File > Close**.



- Click the Close icon in the top right corner of the Meeting window.

Important

Don't leave the Meeting window open. Synchronization problems can occur if you do.

- Click to perform a manual synchronization, thus ensuring that your changes are saved immediately to the calendar server.

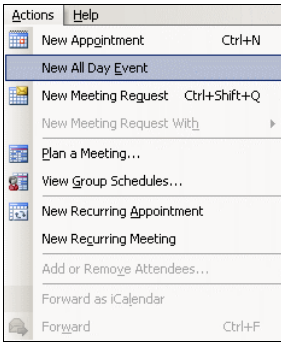
Important

- If you have read-only access to a person's calendar, you can add events that will not be synced to the server, but will remain in the person's Outlook calendar.

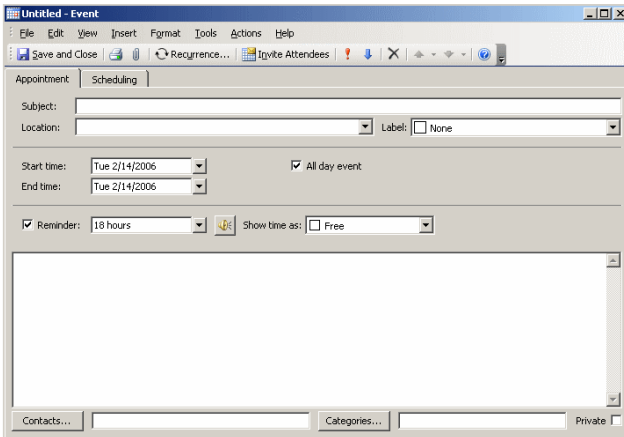
Scheduling an All-Day Event on Behalf of Someone Else

If you've been given access to another person's calendar, you can schedule all-day events on their behalf.

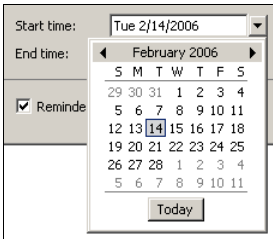
1. In the navigation pane, click **Calendar**.
2. Click within the calendar for whom you're setting up a meeting.
3. Click **Actions > New All Day Event**.



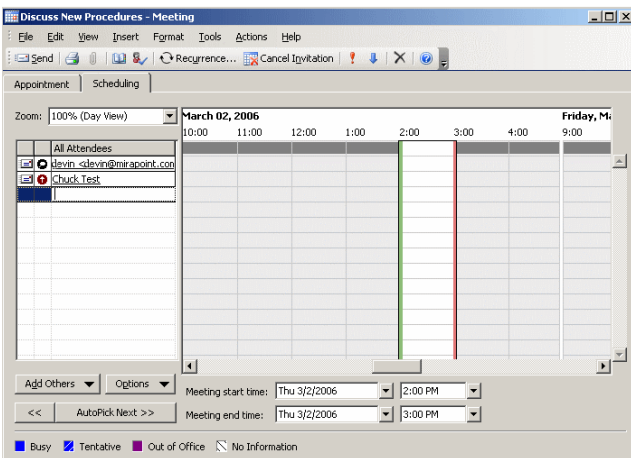
4. In the Event window, enter your meeting details (such as Subject and comments) in the Appointment tab.



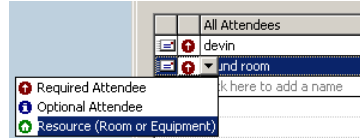
5. If necessary, change the event's Start time and End time by clicking the appropriate down arrow and selecting a different day from the calendar.



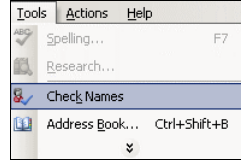
6. Click **Scheduling** (Scheduling tab).
7. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next available line. Repeat this step as necessary.



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. Click **Tools > Check Names** to check the validity and free-busy times of the attendees and resources you entered.



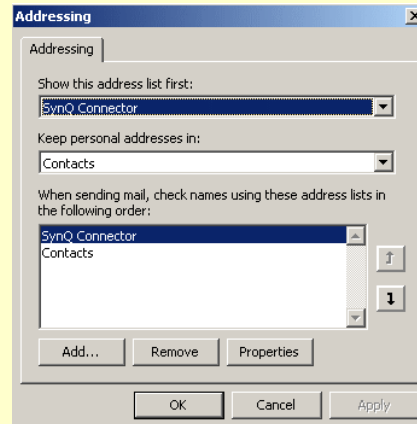
The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

Troubleshooting: Free/Busy Information

Here are some things you can do if free-busy times aren't available.

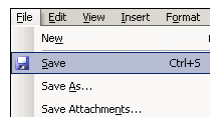
- If you can't find other users or perform free/busy lookups, it's possible that lookups are using the wrong directory service. Check to see which directory service is currently in use:

1. In Outlook, select **Tools > Address Book**.
2. In the Address Book window, choose **Tools > Options**.
3. On the Addressing tab, do the following:
 - o Make sure **SynQ Connector** displays in the **Show this address list first** field. If it isn't, click the down arrow **▼** and choose **SynQ Connector** from the drop-down list.
 - o Make sure **SynQ Connector** is listed first in the **When sending mail, check names using these address lists in the following order** field. If it isn't, click **SynQ Connector** and click the up positional arrow **↑** as appropriate.



- While entering attendee names on the Scheduling tab, try the Outlook keyboard shortcut **Control-K** to force a 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.

10. Choose **File > Save**.



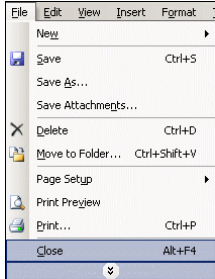
Important


The **Cancel Invitation** is not available. If you entered attendees on the Scheduling tab and then decide not to send your meeting request, do the following:

1. Return to the Scheduling tab by clicking the Scheduling tab within the Meeting window.
2. Delete your invitees from the **All Attendees** lines.

11. Close the Meeting window in one of the following ways:

- o Choose **File > Close**.



- o Click the Close icon  in the top right corner of the Meeting window.

Important

Don't leave the Meeting window open. Synchronization problems can occur if you do.

12. Click to perform a manual synchronization, thus ensuring that your changes are saved immediately to the calendar server.

Important

- If you have read-only access to a person's calendar, you can add events that will not be synched to the server, but will remain in the person's Outlook calendar.

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 delegator.

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

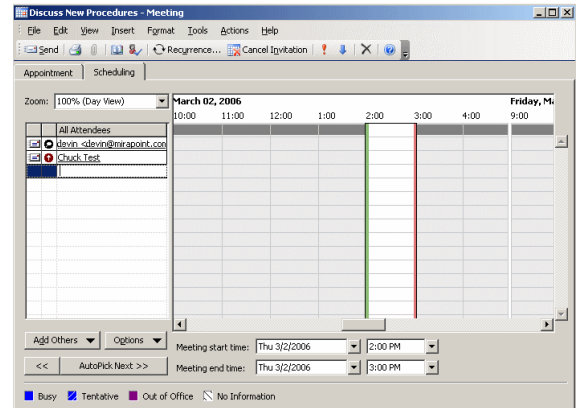
If you need to change a resource for an existing meeting, you cannot drag and drop a calendar item from a resource's calendar to another resource's calendar. To change a resource for an existing meeting, you need to delete the unwanted resource from the Scheduling tab (within the Outlook Meeting window)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


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

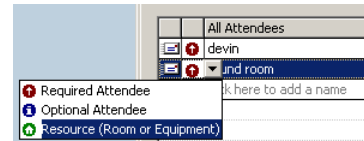
- [Change options for an item that is not part of series](#)
- [Change options for an entire series](#)
- [Change options for one item that is part of a series](#)

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

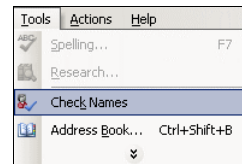
1. In the event owner's calendar, open the particular appointment, event, or meeting by double-clicking the item.
2. Do any of the following:
 - o On the Appointment tab, change the options (subject, time, etc.) as necessary.
 - o Add new attendees as appropriate, by doing the following:
 - a. Click  (Scheduling tab).
 - 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. Click **Tools > Check Names** to check the validity and free-busy times of the attendees and resources you entered.



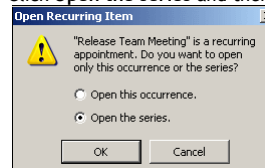
The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.


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

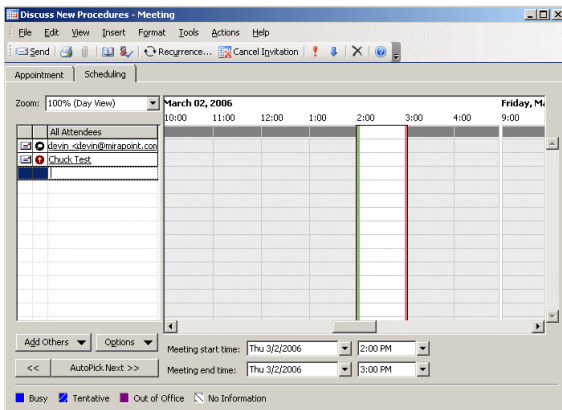
- o Delete attendees as appropriate by doing the following:
 - a. Click the Scheduling tab.
 - b. Highlight an attendee.
 - c. Press **Delete**.
3. Click .
4. In the Microsoft Outlook dialog box, specify whether you want to send a message to the attendees notifying them of the update.


Changing options for an entire series.

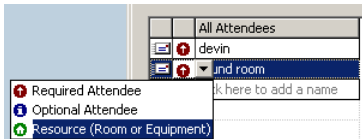
1. In the event owner's calendar, open particular appointment, event, or meeting by double-clicking the item in your calendar.
2. Click **Open the series** and then click **OK**.



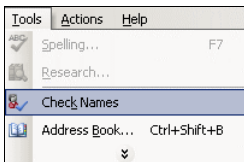
3. Do any of the following:
 - o On the Appointment tab, change the options (subject, time, etc.) as necessary.
 - o Add new attendees as appropriate, by doing the following:
 - a. Click  (Scheduling tab).
 - b. In the All Attendees column on the Scheduling tab, enter an attendee's user name in the next 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.



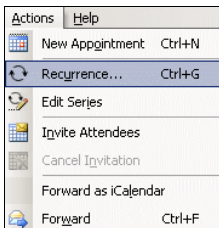
- d. Click **Tools > Check Names** to check the validity and free-busy times of the attendees and resources you entered.



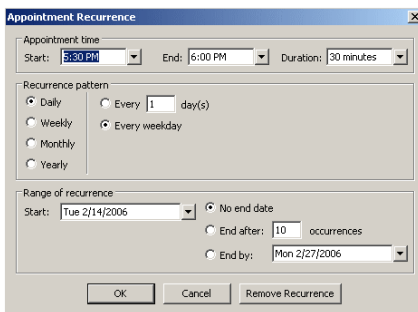
The schedule grid will display free/busy times for you and your attendees/resources. White time slots signify free time, colored time slots mean busy.

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


- o Delete attendees as appropriate by doing the following:
 - a. Click the Scheduling tab.
 - b. Highlight an attendee.
 - c. Press **Delete**.
- o Change recurrence options
 - a. In the Recurring Appointment window, click **Actions > Recurrence**.



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



- c. Click **OK**.

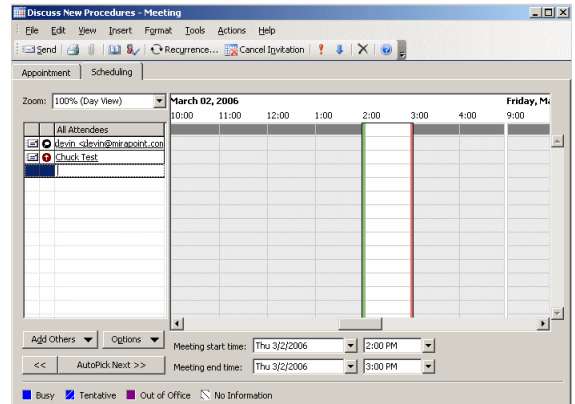
4. Click .
5. In the Microsoft Outlook dialog box, specify whether you want to send a message to the attendees notifying them of the update.


Changing options for one item that is part of a series

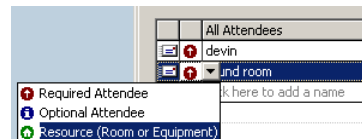
1. In the event owner's calendar, open the particular appointment, event, or meeting by double-clicking the item in your calendar.
2. Click **Open this occurrence**.



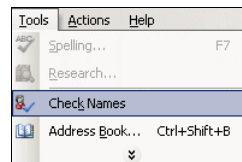
3. Do any of the following:
 - o On the Appointment tab, change the options (subject, time, etc.) as necessary.
 - o Add new attendees as appropriate, by doing the following:
 - a. Click **Scheduling** (Scheduling tab).
 - b. In the All Attendees column on the Scheduling tab, enter an attendee's user 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. Click **Tools > Check Names** to check the validity and free-busy times 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.

- o Delete attendees as appropriate by doing the following:
 - a. Click the Scheduling tab.
 - b. Highlight an attendee.
 - c. Press **Delete**.

4. Click .

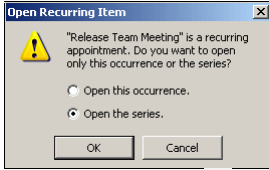
5. In the Microsoft Outlook dialog box, specify whether you want to send a message to the attendees notifying them of the update.

Important: With each of the procedures listed above, you must click **Save and Close** after you've made your modification. Leaving the Meeting window open could cause synchronization problems.

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 **Delete** button.
4. In the dialog box, select the appropriate option and then click **OK**.



5. Click the SynQ icon to perform a manual synchronization.

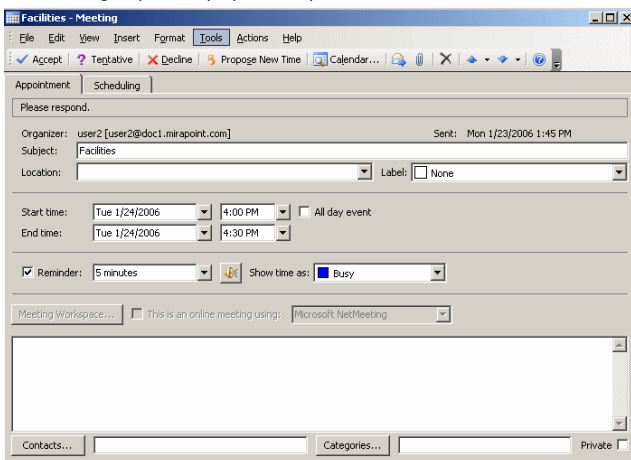
Replying to a Meeting Request on Behalf of Someone Else

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-SynQ environment, you—as the delegate—need to respond to meeting requests by accessing the delegator's calendar.

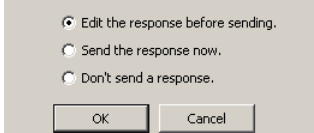
What You Need to Know

- The “Tentative” meeting request response option is not supported in the Outlook-Mirapoint Corporate Edition environment. **Accept**, **Decline**, and **Propose another meeting time** are valid responses. Deleting a meeting request is the same as declining it.

1. In the navigation pane, click **Calendar...**.
2. Click within the calendar for whom you're setting up a meeting.
3. Click the SynQ icon to perform a manual synchronization.
4. Open the meeting request by double-clicking the item in the 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. Do one of the following as appropriate:
 - o **Accept the meeting request:**
 - a. Click **Accept**.
 - b. Select a response option in the dialog box.



- c. Click **OK**.
If you selected **Edit the response before sending**, enter your response details in the Accepted window and then click **Send**.
- o **Decline the meeting request:**
 - a. Click **Decline**.
 - b. Select a response option in the dialog box.
 - c. Click **OK**.
If you selected **Edit the response before sending**, enter your response details in the Declined window and then click **Send**.
 - o **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 owner and other 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. SynQ 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.)

There are two ways to resolve conflicts:

- Manually—This is the default setting when you first install the SynQ add-in.
- Automatically

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

Resolving Conflicts Manually

With manual conflict resolution, the **Conflict detected - SynQ** dialog box will display whenever SynQ detects a conflict during synchronization.

Data source	Outlook	Server
Title/Summary	Let's go for a walk	Let's go for a walk
Start time	2/23/2005 4:00:00 PM	2/23/2005 4:00:00 PM
End time	2/23/2005 4:30:00 PM	2/23/2005 5:00:00 PM
Time zone	(GMT-08:00) Pacific Time (US & Canada); Tijuana	America/Los_Angeles
All day event	No	No
Mail reminder	5 minutes beforehand	70 minutes beforehand
Creator e-mail address	Unknown	
Attendees		devin@mirapoint.com
Busy status	0	*Unsupported*
Priority	Normal	Normal
Read permission	Calendar default	Calendar default
Write permission	Calendar default	Calendar default
Pager reminder	*Unsupported*	Disabled

To resolve the conflict, select one of the following resolution options:

- Change on left wins**—Your Outlook version of that item will overwrite the matching calendar server item.
- Change on right wins**—The calendar server version of that item will overwrite the matching Outlook item.
- Ignore this conflict**—Neither version of the item is modified.
Note: It is strongly advised that you resolve conflicts as soon as they are detected.

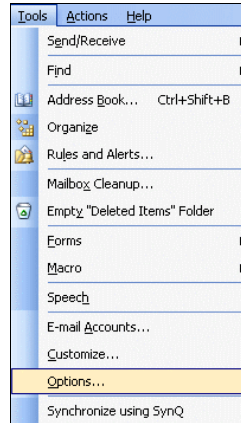
After you select an option, click OK.

Resolving Conflicts Automatically

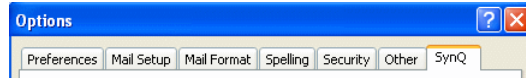
You can setup SynQ to resolve conflicts automatically—thus avoiding the need to deal with the **Conflict detected - SynQ** dialog box each time a conflict is detected.

To setup automatic conflict resolution:

- In Outlook, select **Tools > Options**.



- In the Options dialog box, click the **SynQ** tab.



- In the Automatic Conflict Resolution section, click the down arrow and select a "winner" whenever SynQ encounters a conflict:

- Favor Outlook**
- Favor Server**

Whenever a conflict is detected during synchronization, SynQ will automatically overwrite either the calendar server or Outlook item, depending on your Automatic Conflict Resolution selection.

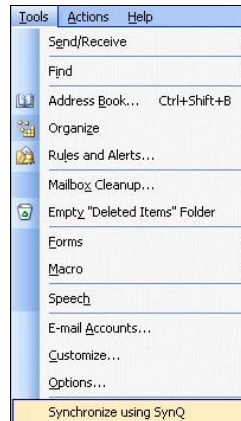
- Click OK.

Synchronizing Manually

When SynQ is first installed, the add-in is set for manual synchronization. This means that synchronization of data between the calendar server and Outlook occurs only when you initiate it.

There are two ways to synchronize manually:

- By selecting **Tools > Synchronize** from the Outlook Toolbar.



- By clicking the SynQ icon within the Outlook toolbar.

Important: Generally, you should synchronize manually whenever you complete a task involving the Outlook calendar, contacts, or tasks. The exception might be if you have a lot of data to synchronize that would make synchronization inconvenient at that particular moment.

Synchronizing Automatically

To synchronize your data automatically, complete the steps in [Setting Up Automatic Synchronization](#).

Important: Regardless of whether you have automatic synchronization enabled, it is good practice to perform a manual synchronization whenever you complete a task that involves your calendar. This ensures that other people who are planning meetings can see your most up-to-date free/busy times.

What Data is Synchronized?

SynQ 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 SynQ synchronizes.

Calendar Events

Outlook SynQ 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 as 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

SynQ 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

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

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

Updating the SynQ Add-in

If a new version of Outlook SynQ becomes available, an alert will pop up automatically while you're in Outlook and ask whether you would like to update SynQ. New versions of Outlook SynQ 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 SynQ.

GLOSSARY

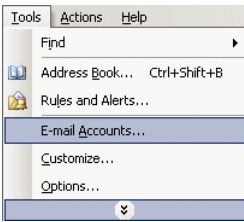
- **Appointments/Meetings/Events**
 - **Appointments**—An appointment is an activity that you schedule in your calendar that do not involve inviting other people or reserving resources.
 - **Meetings**—A meeting is an appointment you invite people to or reserve resources for.
 - **Events**—An event is 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 delegator 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.
- **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.

APPENDIX A—RE-ENABLING THE FIND PEOPLE FEATURE

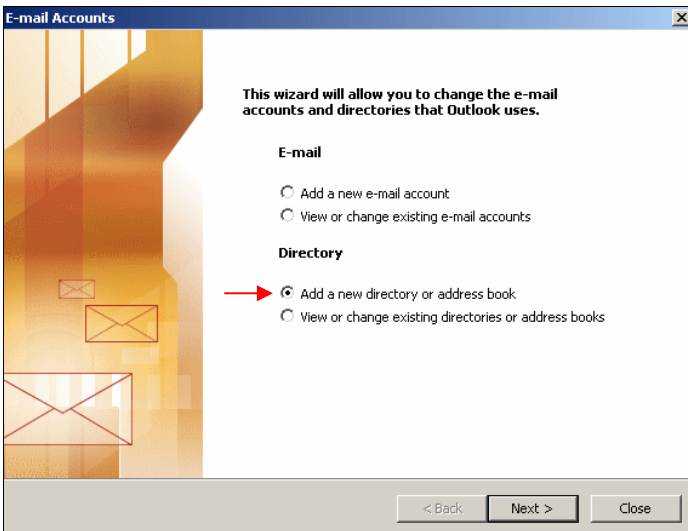
In the event that the SynQ Connector LDAP entry was deleted after Outlook SynQ was installed, you can manually enable the Find People feature in Outlook 2003. (The SynQ Connector LDAP entry is set up and the Find People feature is enabled automatically during a successful SynQ installation.)

To enable the Find People feature, do the following:

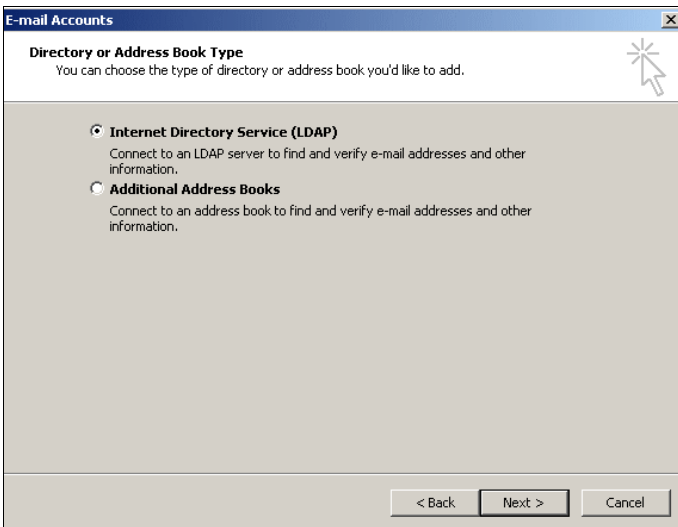
1. In Outlook, select Tools > E-mail accounts.



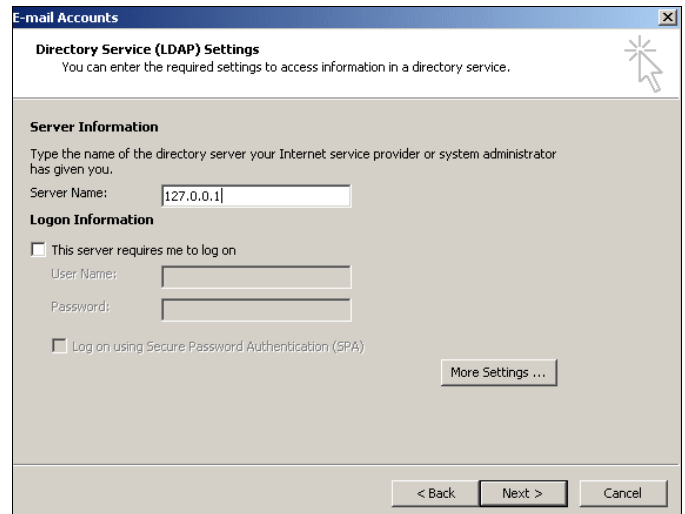
2. Select Add a new directory or address book and then click Next.



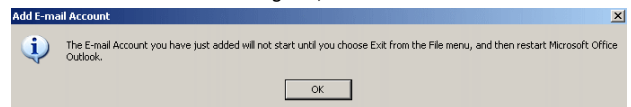
3. Select Internet Directory Service (LDAP) and then click Next.



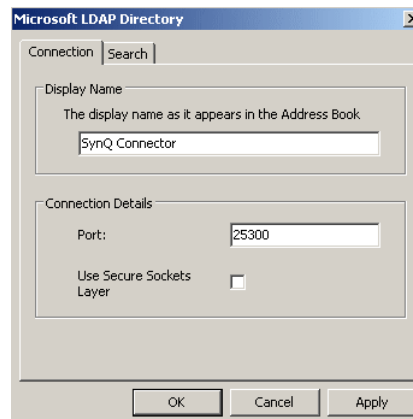
4. In the Server Name field, enter 127.0.0.1 and then click **More Settings ...**.



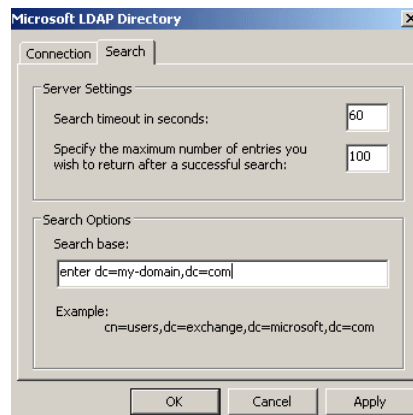
5. In the Add E-mail Account dialog box, click OK.



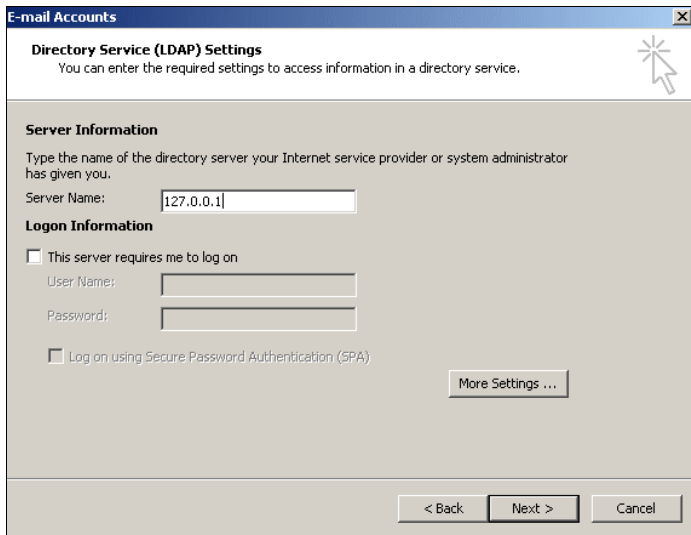
6. On the Connection tab, do the following:
 - a. In the Display Name field, enter SynQ Connector.
 - b. In the Port field, enter 25300.
 - c. Click the Search tab.



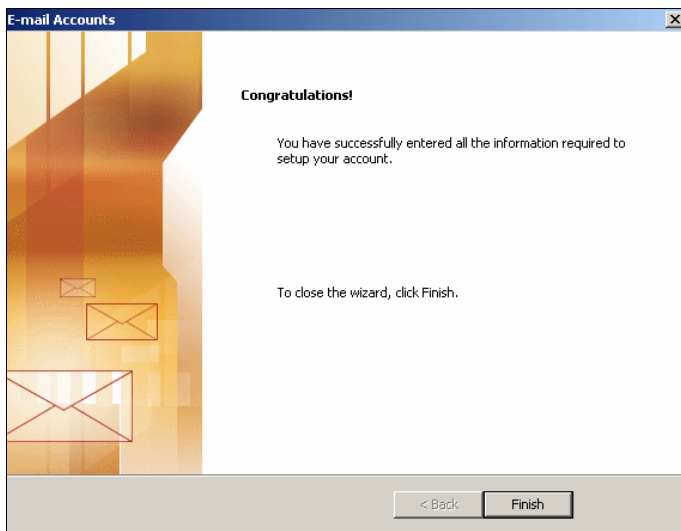
7. In the Search tab, enter dc=my-domain,dc=com in the Search base text field. Then click OK.



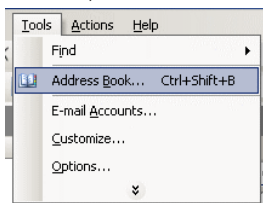
8. In the Directory Service (LDAP) Settings screen, click Next.



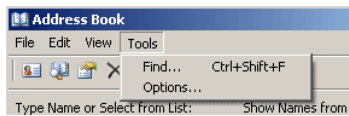
9. Click Finish.



10. In Outlook, select Tools > Address Book.

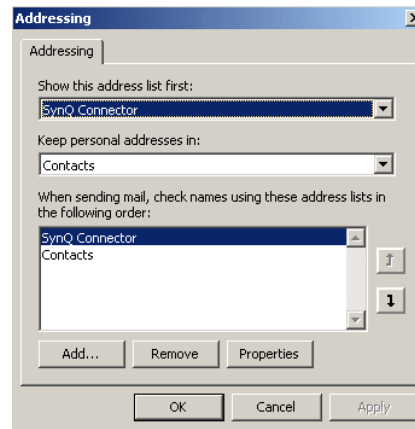


11. In the Address Book window, choose Tools > Options.



12. On the Addressing tab, do the following:

- o Make sure SynQ Connector displays in the Show this address list first field. If it isn't, click the down arrow ▼ and choose SynQ Connector from the drop-down list.
- o Make sure SynQ Connector is listed first in the When sending mail, check names using these address lists in the following order field. If it isn't, click SynQ Connector and click the up positional arrow ↑ as appropriate.



13. Click **OK**.

14. Close the Address Book window.

15. Restart Outlook.

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