



IPSWITCH

Collaboration Suite

2006

IPSWITCH

WorkgroupShare v2.0

Client Guide for Microsoft Outlook Users

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Revision History

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Installing WorkgroupShare Client

Chapter 1

Overview

WorkgroupShare is a plug-in for Microsoft Outlook that lets you share Outlook data, such as calendars, tasks, contacts, distribution lists and notes with other users in your organization.

This chapter describes how to install the WorkgroupShare client.

Minimum Requirements

- Microsoft Windows XP/2000/2003
- Pentium 350 MHz (or equivalent)
- 64 MB RAM
- 10 MB hard disk space
- Network interface card must be installed for internal TCP/IP network connection to the WorkgroupShare Server
- Microsoft Outlook 2000 or later

Note: WorkgroupShare does not work with Microsoft Outlook Express.

Installation

Note: Make sure Microsoft Outlook is not running before beginning installation.

- 1 Log into your user account. Start the **ClientSetup.exe**. By default the ClientSetup.exe file is installed in the C:\Program Files\Ipswitch\Collaboration Suite\WorkGroupShare\Client-Setup folder. The Welcome page appears.

Note: The location of ClientSetup.exe will be provided to you by your WorkgroupShare administrator.

In this Chapter

Overview

Installation

Silent Installation

Additional Step for
Outlook 2000

- 2 Click **Next** to continue. The License page is displayed.
- 3 To proceed with the installation, you must accept the terms of the license agreement by clicking **Accept**. The Select Folder page is displayed.
- 4 Enter the path of the folder where you want to install the program, then click **Next**. The Details page is displayed.

Note: If the program asks you to run the server, contact your WorkgroupShare administrator.

- 5 Select the **User** name and enter the **Password** for the user who uses Microsoft Outlook on this computer, then click **Next**. The Outlook Folders page appears.

Note: If your username is not available in the list, contact your WorkgroupShare administrator.

- 6 Select the folders you want to share with other users, then click **Next**. The Summary page appears.

Note: Selecting a folder as sharable will not automatically share it with other users. It will make it available to an administrator for granting the appropriate access to other users.

- 7 To complete the installation, click **Finish**.

Silent Installation

Larger organizations who want to roll out many clients may find it useful to take advantage of the unattended (or silent) installation capability of the Client Setup.exe program. In this case, the filename command line is entered into users' startup scripts, so that the Workgroup Share client is automatically installed the next time users start their computers. In either case, you must follow the next step, "Additional Step for Outlook 2000," in order to complete the installation.

Additional Step for Outlook 2000

For WorkgroupShare to work with Microsoft Outlook 2000, you must download and install the Microsoft Web Publishing Wizard for Free/Busy lookups.. For information about the Microsoft Web Publishing Wizard and where to get it, see:

<http://support.ipswitch.com/kb/IC-20040920-DM01.htm>

After you install the client program, a new **Share** menu option appears under the **Tools** menu in Microsoft Outlook.

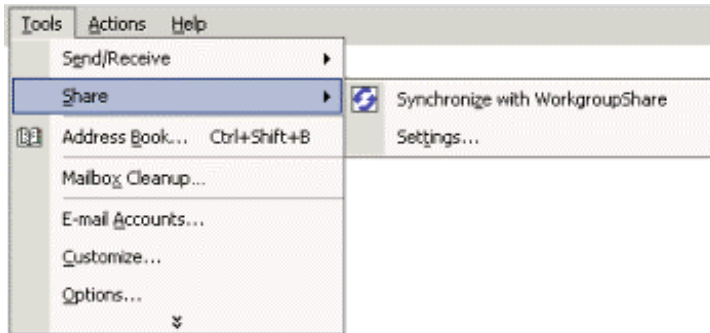
- Click **Tools > Share > Synchronize with WorkgroupShare** to manually synchronize WGS.
- Click **Tools > Share > Settings** to select the list of personal folders you want to make available for sharing.

Using WorkgroupShare Client

Chapter 2

The Share Menu

After you install the client program, a new **Share** menu option appears under the **Tools** menu in Microsoft Outlook.



- **Synchronize with WorkgroupShare** manually synchronizes Outlook with the WorkgroupShare Server.
- **Settings...** shows the list of personal folders that you have chosen to make available for sharing.

Synchronizing

After you complete the installation and start Outlook, Outlook starts communicating with the WorkgroupShare server for the first time. It uploads all shared personal folders and their contents to the server. No one else will see this information unless an administrator specifically grants them access to your folders.

During the synchronization process, you can continue to use normal Outlook functions. The initial synchronization process time depends on how much data exists in the personal folders. A blinking icon in the system tray will cue you that a synch is occurring.

In this Chapter

The Share Menu

Synchronizing

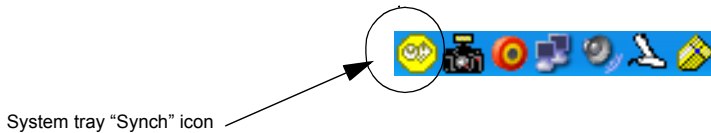
Granting Access to Folders for other Users

Shared Folder Structure

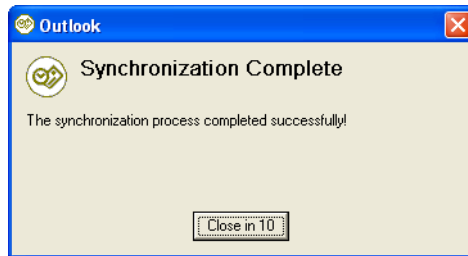
Shared Contacts Folders and the Outlook Address Book

Shared Folder Security

Organizing Meetings with Free/Busy



WorkgroupShare automatically synchronizes on a time interval configured by your server administrator. You can always synchronize manually in Outlook at any time by selecting **Tools > Share > Synchronize with WorkgroupShare**. After a manual synchronization, the Synchronization Complete alert displays to confirm that synchronization has completed without error.

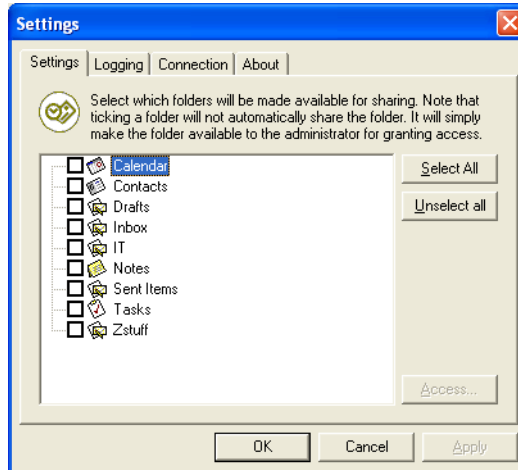


Granting Access to Folders for Other Users

In addition to the administrator having full access control over all users and folders participating in WorkgroupShare, each user can also grant access to their folders for other users.

To grant folder access to other users:

- 1 In Outlook, click **Tools > Share > Settings** from the menu within Outlook. The Settings dialog box appears.



- 2 Select the folder that you want to grant other users access to, then click **Access**. The Access dialog box appears.

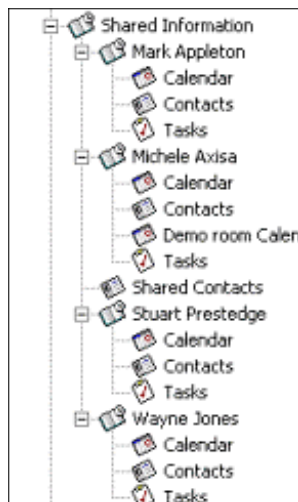
Note: If the Access button is disabled, the selected folder has not been synchronized with the WorkgroupShare server. After Outlook has synchronized, this button is enabled. For more information, see “Synchronizing” on page 4.

- 3 From the **User** list, select a user you want to grant access to a selected folder, then click **Add**. The user appears in the **Users** list below with a default access level of Read Access. If you want to change the access level, (for example, give a user full access to the folder), then select a user from the **User** list, then click the **Access Level** list and select the appropriate access level.

Shared Folder Structure

When you are granted access to shared information, a **Shared Information** folder appears as a top level folder in the Outlook folders list. If you have been granted access to shared user folders, then a folder representing each user to whose information you have been given access appears as a child folder of the Shared Information folder. All shared personal folders that you have been given access to appear as child folders under the appropriate user’s folder.

Note: The more shared content you have access to, especially to users with busy calendars, you will see some performance degradation during synchronization. Pick your shares judiciously!



When you access folders under a user, the most up-to-date contents of that user's folder display.

If access is revoked for a folder or user, the corresponding user folder or item folder is removed from the Outlook folders list.

Shared Contacts Folders and the Outlook Address Book

WorkgroupShare lets you select contacts in shared contacts folders as e-mail recipients. In most cases, WorkgroupShare makes shared contacts folders available to the Outlook address book automatically. For Outlook 2000, however, you must enable this option manually.

To make a shared contacts folder available to your Outlook 2000 address book:

- 1 In the Outlook **Folder List**, right-click the shared contacts folder you want to make available to your Outlook address book. Select **Properties**.
- 2 Click the **Outlook Address Book** tab.

- 3 Select **Show this folder as an e-mail Address Book**. If you want to change the name of the folder in your Outlook address book, edit the **Name of the address book**.
- 4 Click **OK** to save the changes and exit the dialog. The shared contacts folder is now available in your Outlook address book.

Shared Folder Security

If you attempt to perform an operation on a shared folder that you are not permitted to do (for example, adding an item to a folder to which you have read-only access), Outlook will warn you with a message similar to that shown below:



When you click **Close**, the folder will re-synchronize, resetting the folder contents back to the original state.

Organizing Meetings with Free/Busy

When organizing meetings in Outlook, it is vital to know the free/busy times for each person you are inviting to the meeting so that you know whether or not they are likely to attend. WorkgroupShare has its own Free/Busy server, which provides the free/busy times for each WorkgroupShare user who shares his or her calendar.

Setting Free/Busy Options

To invite a WorkgroupShare user to a meeting using Outlook and see their free/busy information, configure Outlook to use WorkgroupShare as its Free/Busy server.

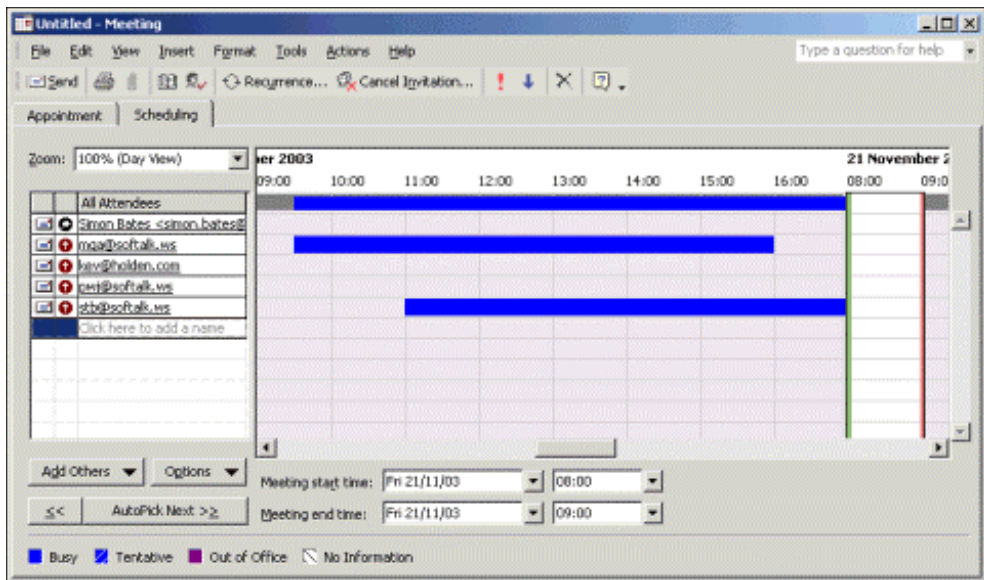
- 1 In Outlook, select **Tools > Options**. The Options dialog appears.
- 2 Click **Calendar Options**. The Calendar Options dialog appears.
- 3 Click **Free/Busy Options**. The Free/Busy Options dialog appears.

- 4 If **Publish my Free/Busy information** is selected, clear it. Enter the following address in **Search at this URL**, replacing “your-server-ip” with the IP address or host name of the computer that runs WorkgroupShare Server:

`http://your-server-ip:8109/%NAME%`

Note: You should not replace %NAME% with your username. This variable is dynamically replaced with the username of the user whose Free/Busy information you are trying to access each time you search.

- 5 Click **OK** to exit each of the dialogs.
- 6 Select **File > New > Meeting Request**. The Meeting Request dialog appears.



- 7 Select the **Scheduling (Attendee Availability in Outlook 2000)** tab. In the attendee list, enter the e-mail address of the user whose free/busy time you wish to view and press enter. The user’s free/busy information appears in the right hand window.

Note: If the user’s information is not shared or is unavailable for some reason, an error dialog appears. If this happens, contact your WorkgroupShare administrator.