Administrators Guide

Version 3.x

Contents

Introduction

Welcome

Welcome to the Out'n About! for Outlook Administrators Guide. This guide provides step-by-step instructions on how to install and configure the Out'n About! for Outlook Server and Client software.

Administration

Out'n About! for Outlook does not require much administration and nearly zero maintenance. The work associated with performing administration for Out'n About! consists of adding users and departments to the system and installing the client software when readying a new PC.

This manual contains 2 main sections:

- **Installation**
  How to install the Out'n About! for Outlook server and client software.

- **Administration**
  How to configure the Out'n About! for Outlook server and how to add users and departments to the system.

Please check out our web site at http://www.intelligentconcepts.com to get the latest information and updates for Out'n About! for Outlook.

System Design

The following section provides a description of how Out'n About! for Outlook works and the technology used to develop the product. If you want to get started with Out'n About! for Outlook quickly, you can skip this section.

Overview
Out'n About! for Outlook is a two-tier client/server based system. The system consists of a number of clients (users) and a server/database.

Out'n About!
Clients

TCP/IP

Out'n About!
Server/Database

The Out'n About! for Outlook Server is the central point for all client communication and database operations. The server operates as a NT service on Windows NT/2000/XP/2003/Vista/7/8 and includes a service monitor to allow easy configuration and monitoring.

The Out'n About! For Outlook client is a Microsoft Outlook add-in that is seamlessly added to the Outlook interface to extend and enhance the world's leading e-mail and scheduling software.

Both the server and client software were written in C++ using Microsoft Visual Studio 2010 Active Template Library (ATL), Extended MAPI, and Component Object Model (COM) technology to provide the fastest and most reliable In/Out Status Board solution available.
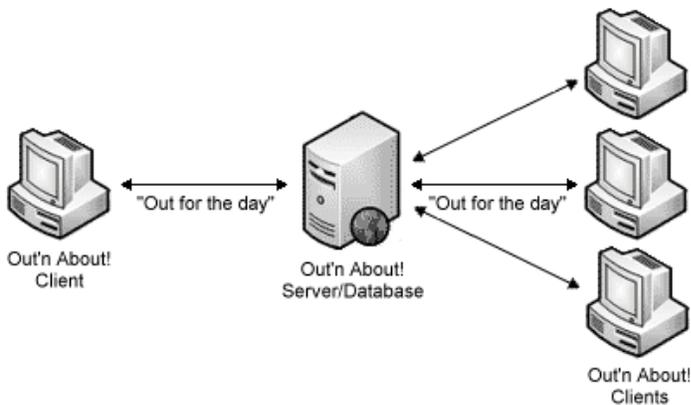
All communications between the clients and the server utilize TCP/IP sockets on port 23079. The clients connect to and communicate with the server; the clients actually never communicate to each other directly

The Out'n About! for Outlook database consists of two files stored in the program directory on the server:

- OutAbout.wdb (user database)
- OutAbout.wdm (user contact information)
- OutAbout.wdh (user status history for reporting)

When a user changes status (e.g., "Out for the day"), the following information exchange takes place:

- Client notifies server of status change
- Out'n About! for Outlook Server stores user status
- Out'n About! for Outlook Clients periodically connect to server to retrieve any information changes. This periodicity is configurable at each client workstation

Installation

System Requirements

The following section describes the requirements for running Out'n About! for Outlook.

Server Requirements

The Out'n About! for Outlook Server can be installed on the following operating systems:

- Windows NT 4.0
- Windows 2000
- Windows XP Professional
- Windows 2003
- Windows Vista
- Windows 2008
- Windows 7
- Windows 8

It is not recommended, but, if you do not have one of these operating systems the Out'n About! for Outlook server can run as a console application. For details, please contact Intelligent Concepts and Solutions technical support via our website.

Memory and hard drive space required:

- 3 Mb for the server and monitoring software
- Less than 2 Kb per user

The memory and hard drive requirements for the Out'n About! for Outlook server are minimal. For example, a 500 user system would require less than 2Mb of system memory and disk space.

The Out'n About! for Outlook server utilizes TCP/IP communication, therefore, a TCP/IP network protocol must be installed.

Client Requirements

The Out'n About! for Outlook client can be installed on any Microsoft Windows system that includes one of the following versions of Microsoft Outlook:

- Outlook 2000
- Outlook XP
- Outlook 2003
- Outlook 2007

- Outlook 2010
- Outlook 2013

It is highly recommended that the current service packs be applied to both the Windows operating system and the Outlook software in order to ensure that all of the Out'n About! features operate properly. Outlook 2000 installations require at least Service Release 1A. The software may not operate properly if this Service Release is not installed.

Hard drive space required:
- 6 Mb for the client software and user guide

Memory required:

- Less than 2 Mb for the client software
- Less than 2 Kb per user

The memory requirements for the Out'n About! for Outlook client are minimal. For example, a 500 user system would require less than 2.5Mb of system memory.

The Out'n About! for Outlook client utilizes TCP/IP communication, therefore, a TCP/IP network protocol must be installed. If you are installing the Out'n About! client on a Windows 95 based machine you may need to install the WinSock2 system to allow TCP/IP communication.

Installation

The following section provides instructions for installing both the Out'n About! for Outlook server and client applications. System requirements for both applications are provided in the previous section.

Server Installation

To install the Out'n About! for Outlook Server you must have administrator rights. If you wish to allow users to connect remotely via the Internet you will have to allow inbound TCP/IP connections on port 23079 from the Internet.

Download and run the Out'n About! for Outlook Server installation program from our website. Follow the installation wizard instructions.

If you are upgrading from a previous version, we strongly recommend that you backup the Out'n About! for Outlook database files located in the program install directory.

When prompted, enter the default administrator information. This information is extremely important as this will be the only user contained in the Out'n About! database upon finishing installation. This user will have the ability to add new users and departments as well as add new administrators to the system using the Out'n About! for Outlook Client.

Client Installation

Download and run the Out'n About! for Outlook Server installation program from our website. Follow the installation wizard instructions. The next time you start the Microsoft Outlook application, the Out'n About! for Outlook client will start automatically.

Group Policy/Active Directory Client Deployment

An optional MSI (Outlook x86 and Outlook x64 available) installer is available on our website if you wish to deploy the Out'n About! for Outlook Client using Group Policies or Active Directory deployment.

Silent Client Installation

Silent installations are installations that run without a user interface. To help facilitate installation across larger organizations, the Client setup program allows silent installations. This can be used along with windows scripting to allow remote installation by system administrators.

To run the Client setup program in silent mode use the '/s' command line parameter: *OutAboutClientSetup.exe /s.*

Default Server Address

The default server address can be set at:
HKEY_LOCAL_MACHINE/Software/Intellicon/Out'n About! for Outlook
Sub Key: "Default Server Address"

Administration
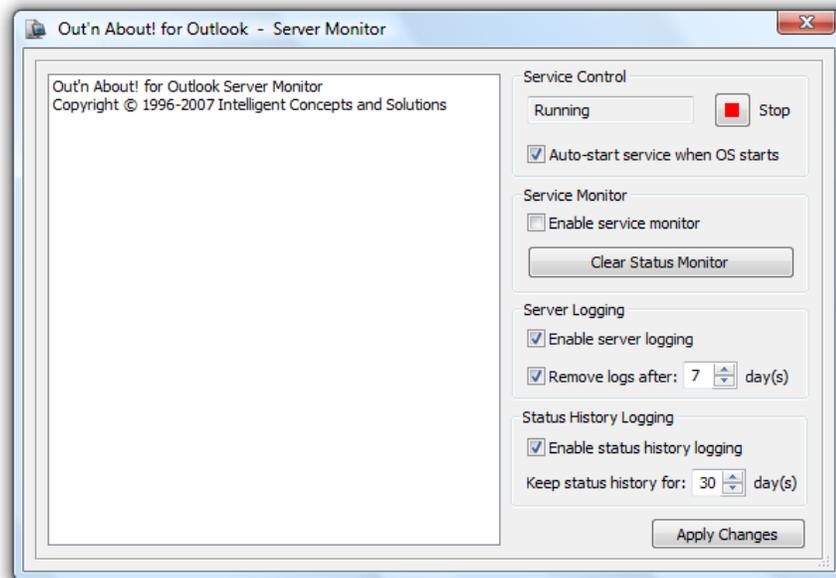
Server Administration

The following sections provide step-by-step instructions how to configure and administer the Out'n About! for Outlook system.

Server Monitor

The Out'n About! for Outlook Server Monitor is provided to allow easy configuration and administration of the Out'n About! for Outlook service.
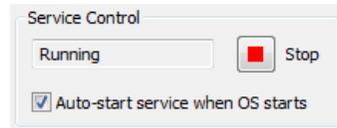
Upon completing the installation, the server monitor application is added to the system tray to allow quick access. Double click on the server monitor icon to the view the server monitor. You can also right click on the server monitor icon to quickly perform Out'n About! for Outlook server commands.

Note: The Out'n About! for Outlook Server Monitor program can only run on the same computer as the Out'n About! for Outlook server since it connects to the locally installed service.

Service Control

The Service Control group allows you to control the Out'n About! for Outlook Service (server).

Using the Service Control group you can view the current service status, start or stop the service, and configure the service to auto-start when the operating system starts. It is recommended that the service is set to auto-start so you do not have to manually start the service each time the machine is restarted.
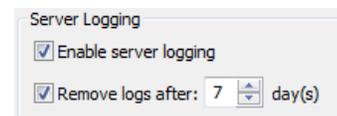
Service Monitor

The Service Monitor allows you to monitor what operations the server is currently performing.

All user operations that require the server are displayed in the service monitor window when this option is enabled. This feature is useful for troubleshooting or diagnosing connectivity issues.

Server Logging

The Server Logging group allows you to capture all connections and operations performed on the server.

The log files are stored for as many days as you configure and are stored in the program directory in the *logs* folder. The log files are comma delimited to allow import into external programs like Excel or a database.

<u>Sample Log File Entries</u>

03/24/06 14:02:12, User Login, Login Successful, joe@intelligentconcepts.com
03/24/06 14:02:12, Set User Status, In, joe@intelligentconcepts.com

Status History Logging

The Status History Logging group allows you to capture all status changes performed by the Out'n About! users. These log entries are used to create both Status History and Time Card reports using the client software.

The status history entries are stored for as many days as you configure and are stored in the OutAbout.wdh database file.

Software Registration

If you purchase a server site license (unlimited user) you must enter the company name and registration code provided in the activation e-mail you received when you purchased the license. If you did not enter the registration code during the install process, you can register the software using the server monitor. Enter your registration name and code exactly as provided by Intelligent Concepts and Solutions
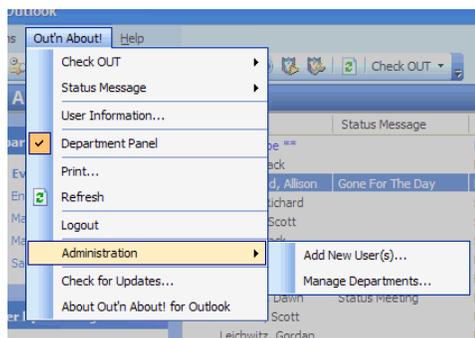
Client/System Administration

Administrator Menus

All department and user administration is performed using the Out'n About! for Outlook client interface. In order to perform these functions, the logged in user must have Out'n About! administrator rights. When initially adding departments and users to the Out'n About! for Outlook system, login as the user configured during the server installation process.
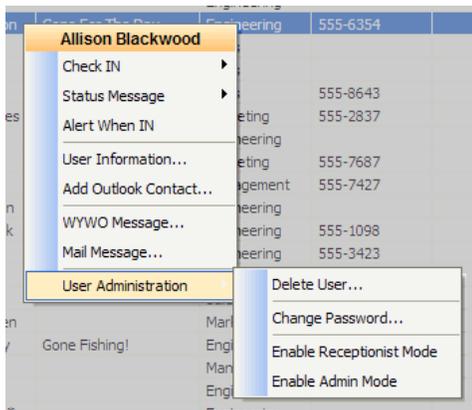
System Administration Menu

The system administration menu is used to add departments and users to the system. This menu is available from the main Outlook menu bar.

User Administration Menu

The user administration menu is used to perform administrative operations on existing users in the system. This menu is available by double clicking or right clicking on an existing user in the In/Out Status Board.
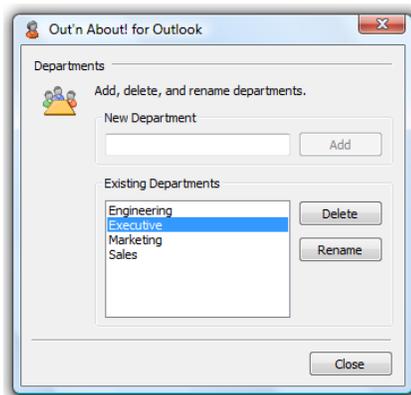

Department Management

The first step in configuring the Out'n About! In/Out Status Board is to add the department names in your organization. Departments are used by Out'n About! users to quickly view only the employees who belong to a department on their In/Out Status Board.

Using the main administrator menu, select the "**Departments…**" menu item. You can also quickly display the Departments dialog by right clicking on a department or the department group title on the Out'n About! Departments Panel. You can Add, delete, and rename departments using this dialog.

User Management

Adding Users

The next step in configuring the Out'n About! for Outlook system is to add users to the Out'n About! In/Out Status Board. Before adding users, it is important to understand the difference between Administrators, Receptionists, and Normal users:

Administrator
Out'n About! administrative users can add and delete users, modify any users information, create reports for any user, and change any users status and status message. Administrative users are identified by two asterisks (**) after their name on the In/Out Status Board.
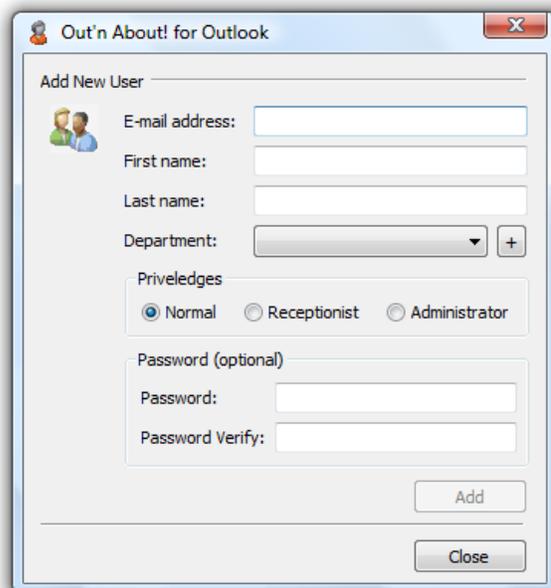
Receptionist
Out'n About! receptionist users can create reports for any user and change any users status and status message. Receptionist users are identified by one asterisk (*) after their name on the In/Out Status Board.

Normal User
Normal Out'n About! users can only change their status, status message, and user information.

Using the main administrator menu, select the "**Add Users…**" menu item.

The Out'n About! for Outlook system identifies users by the e-mail address. The Out'n About! Address Dialog will automatically populate all information if you enter an e-mail address of a contact in your Outlook address book that is not currently included in the Out'n About! system.

Import Outlook Address Book

As an administrator you can import users from the Outlook Address Book/Exchange Global Address List (GAL) by opening the Administration Menu, and selecting the "**Import from Address Book…**" menu item. All imported users will have blank passwords and their User Information will be populated based on Address Book contents. User's must have First and Last name information populated or they will not be added to the system.

Deleting Users

As an administrator you can delete any user from the In/Out Status Board by selecting the user, opening the User Administration Menu, and selecting the "**Delete User…**" menu item. The system will prompt to ensure that you really want to delete the selected user.
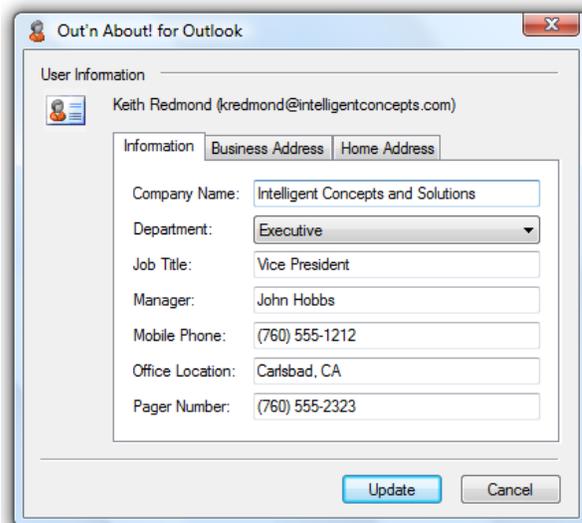
Setting User Privileges

As an administrator you can add or remove administrative and receptions user privileges to any user by selecting the user, opening the User Administration Menu, and selecting the appropriate menu item. For example, to make a user and Administrative user, click on the "**Enable Administrator Mode**" menu item.

Resetting User Passwords

As an administrator you can reset or change any user's password by selecting the user, opening the User Administration Menu, and selecting the "**Reset Password…**" menu item.

Modifying User Information

The Out'n About! for Outlook system maintains information for each user in the database. This information is typically maintained by the user and is used to display information about the user on the In/Out Status Board and is also used by other users to synchronize their contact information in Microsoft Outlook. You can modify any user's information by selecting the user, opening the User Administration Menu, and selecting the "**User Information…**" menu item.