# CorporateTime® Outlook® Connector

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# About CTOC

## What is CTOC?

CorporateTime Outlook Connector (CTOC) is a calendaring and e-mail messaging system that combines Microsoft Outlook with the scalability of CorporateTime Server and your choice of IMAP4 e-mail servers or POP3 servers. Users benefit from a familiar user interface combined with the real-time calendaring of our server. Administrators get the security, reliability and multi-platform support of a CorporateTime solution.

## What's new in CTOC 3.1

- SSL/TLS support over IMAP4 and SMTP
- Quickly accept or decline Meetings
- Support for POP3 mail servers
- Enable or disable CorporateTime Server, IMAP4 and STMP connections
- Configurable number of mail delivery attempts
- Skip a server connection at log-in
- Prompt before synchronizing on exit
- Skip a folder during synchronization
- Download Address Books entries off-line
- Distinct views of private and other user folders
- View message MIME source
- Show all public and private IMAP4 folders on a server
- Manipulate off-line data for unavailable servers
- Clear expired messages
- Display CorporateTime Address lists using different formats
- Folder administration page
- Installation and configuration improvements

**Note:** To learn more about the new features in CTOC 3.1, please refer to the release notes.

## Getting assistance while you work

**Readme**
Consult the readme for install and uninstall information.
**Release Notes**
Consult the release notes to learn about system requirements, limitations and other product information.
**Screen Tips**
To quickly learn more about a feature, position your pointer over the item and hold down the **Shift** and **F1** key.

# Getting started

## Configuring Add-Ins and the CorporateTime Calendar Form

To maximize the features and performance of CorporateTime Outlook Connector 3.1, certain Outlook Add-Ins must be modified and the CorporateTime Calendar Form must be installed.

**See:**
Configuring Add-Ins
Installing the CorporateTime Calendar Form

## Configuring ASP/Domain service log on

Configuring your ASP/Domain service log on specifies your log on information for connecting to an ASP or Domain service.

1. Right-click the **Outlook** desktop icon, and click **Properties**.
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **CorporateTime** tab, click **This server requires a Domain Service** check box, and then click **Settings**.
5. Enter your domain ID in the **Domain ID** text box.
6. Click **Add**, enter a new domain host service in the **Host Name** text box, and click **Add**.
7. Click **OK**.

## Selecting your default service provider

CTOC works best when it is installed as your default mail service provider.

1. On the **Tools** menu, click **Services**.
2. Select the **Delivery** tab.
3. In the **Deliver new mail to the following location** list, click **CorporateTime**.

**See also:**
Installing the CorporateTime Calendar Form

## Configuring server connections

Connect to CorporateTime Server and your choice of IMAP4 or SMTP servers. Users can choose to disable a server connection if they do not have a user account, an alternative server is being used, or due to a service interruption.
**See also:**
Configuring a CorporateTime Server connection

Configuring an IMAP4 server connection
Configuring an SMTP server connection

## Configuring off-line support

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **Startup** tab, select the **Enable off-line use** check box, and click **Work off-line**.
5. Select the **Choose a connection type** check box.
6. Select one of the following options:

- **Connect to the network**
- **Work off-line**

7. Click **OK**.

**See also:**
Configuring off-line synchronization
Selecting folders for off-line synchronization
Assigning an off-line folder password
Changing the location of off-line files

## Configuring PDA conduit support

Configure PDA conduit support to synchronize Outlook with your Palm, Psion, Windows CE or Pocket PC device.

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **Other** tab, and then click **Third-Party Software**.
5. Select the **Pocket Mirror** or **Pocket Journal** check box.
6. Click **OK**.

| Conduit Software | Vendor | Device |
|---|---|---|
| PocketMirror (2.04) | Chapura | Palm Series (3COM) |
| PocketMirror (3.0) | Chapura | Palm Series (3COM) |
| PocketJournal | Chapura | Palm Series (3COM) |
| Desktop To Go 2.5 | DataViz | Palm Series (3COM) |
| PSIWin 2.3 | Psion | Psion Devices (except Revo) |
| PSIWin 2.31 | Psion | Psion Revo |
| ActiveSync 3.0 | Microsoft | Win CE 3.0 (except Pocket PC) |
| ActiveSync 3.1 | Microsoft | Pocket PC enabled devices |

# Server connections

## About CorporateTime Server

With CorporateTime Outlook Connector, Outlook users can access the powerful real-time calendaring and scheduling capabilities of CorporateTime Server.
Real-time scheduling means that whenever a Meeting or Event is scheduled, the calendars of all attendees are automatically and immediately updated. This is possible through CorporateTime Server's centralized calendar database. With CTOC, users calendars are instantly updated with new entries on the server.

## About IMAP4/POP3 e-mail servers

With the Post Office Protocol (POP) style of e-mail delivery, e-mail is delivered to a central POP server. When you connect to this server using a client application such as Outlook, all your mail is immediately downloaded to your local machine and deleted from the server. All further processing of e-mail, including opening, moving and deleting, is carried out locally on your computer.
With the Internet Message Access Protocol (IMAP), all e-mail remains on the server until you expressly remove it. You access, manipulate, and create mail folders on the server as if they were stored locally on your machine.
For users who routinely access their mail from multiple sources — for example, their computer at work, their computer at home, and a laptop when traveling — IMAP servers are more convenient than POP servers. Since e-mail is deleted from the POP network server after you sign in, those messages will be inaccessible if you sign in again using a different machine. With the IMAP delivery model, your e-mail will still be on the server, allowing you to re-read, edit, and forward messages from any machine.
All e-mail items previously stored on Microsoft Exchange Server are stored in folders on an IMAP4-compliant e-mail server. All other items are stored on CorporateTime Server.

## Configuring a CorporateTime Server connection

Enable or disable your connection to CorporateTime Server.

### Enable connection

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **CorporateTime tab**, enter your **Server Name**, **Account Name** and **Password**. If the **CorporateTime** tab is not visible, press CONTROL+ SHIFT+A and uncheck the **I do not yet have a CorporateTime account** check box.

5. If you need to change the server port, click **Advanced**, and enter the **Server Port**.
6. Click **OK**.

### Disable connection

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **CorporateTime tab**, select the **I do not yet have a CorporateTime account** check box. To hide the **CorporateTime** tab, press CONTROL+ SHIFT+A.
5. Click **OK**.

## Configuring an IMAP4 server connection

Enable or disable your connection to a IMAP4 server.

### Enable connection

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **IMAP4** tab, enter your server name, account name and password or click the **Use same settings as my CorporateTime Server** check box. If the **IMAP4** tab is not visible, press CONTROL+ SHIFT+A and uncheck the **I do not yet have a IMAP4 account** check box.
5. If you need to change the server port, click **Advanced**, and enter the server port.
6. Click **OK**.

### Disable connection

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **IMAP4** tab, and select the **I do not yet have an IMAP4 account** check box. To hide the **IMAP4** tab, press CONTROL+ SHIFT+A.
5. Click **OK**.

## Configuring an SMTP server connection

Enable or disable your connection to a SMTP server.

### Enable connection

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.

4. On the **SMTP** tab, enter your server name, display name and e-mail address. If the **SMTP** tab is not visible, press CONTROL+ SHIFT+A and uncheck the **I do not yet have a SMTP account** check box.
5. If you need to change the server port, click **Advanced**, and enter the server port.
6. Click **OK**.

### Disable connection

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **SMTP** tab, and select the **I do not yet have an SMTP account** check box. To hide the **SMTP** tab, press CONTROL+ SHIFT+A.
5. Click **OK**.

## Configuring a POP3 server connection

Configuring POP3 support enables you to use a POP3 server instead of an IMAP4 server for your e-mail. Complete these steps before setting up CTOC with a POP3 service provider.

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **IMAP4** tab, select the **I do not yet have an IMAP4 account** check box.
5. Click **OK**.
6. On the **Delivery** tab, make sure **CorporateTime Transport** appears above **Internet e-mail**.
7. Click **OK**.

**See also:**
Enabling POP3 support with Microsoft Internet e-mail service provider

## Enabling POP3 support with Microsoft Internet e-mail service provider

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, and select **CorporateTime Outlook Connector.**
4. Select **Internet e-mail**, and click **Properties**. If Internet e-mail service is not listed, click **Add**, select **Internet e-mail** and click **OK**.
5. Please visit: http://support.microsoft.com/support/kb/articles/q195/5/00.asp for more information.

**Using CTOC with a POP3 server:**

- Your mail items will be stored in your off-line folders.
- You will not be able to share or subscribe to server-based mail folders, or use delegate rights.
- You will not be able to view public folders

## Sharing log on credentials for mail and CorporateTime Server

Mail and CorporateTime server log on credentials can be shared with IMAP4 and SMTP servers if SMTP authentication is enabled.

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **IMAP4** tab, select the **Use same settings as my CorporateTime server** check box.
5. On the **SMTP** tab, select **The server requires authentication** check box, and click **Settings**.
6. Click **Use same settings as my incoming mail server**.
7. Click **OK**.

## Skipping a server connection at log on

Skipping one or several server connections at log on allows you to skip a connection to an available, or unavailable server. Skip a server connection if you do not need data from a server, or if the server is unavailable.

- Click **Skip** when the server name appears in the sign-in dialog box.

**Note:** The dialog box that enables you to skip a server connection will only be displayed if you enter an incorrect user name or password, or if a server is unavailable.

## Setting the CorporateTime/IMAP4 data refresh rate

Setting the refresh rate allows you to specify the time interval in minutes that CTOC will use to automatically refresh your CorporateTime and IMAP4 data with the server.

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **Other** tab, enter the time interval in minutes in the **Check for new entries every:** field, that you would like to automatically refresh your data.
5. Click **OK**.

## IMAP4 folders

## Viewing all private or public IMAP4 folders

View your entire list of private or public IMAP4 folders without individually subscribing to each folder. To only view specific IMAP4 folders, you must subscribe to, or unsubscribe from folders.

1. On the **Tools** menu, click **IMAP4 Folders**.
2. Select **Show All Folders**.

## Subscribing to, or unsubscribing from private or public IMAP4 folders

Subscribing to an IMAP4 folder lets you view specific folders and expand those folders in the folder list. Unsubscribing from a folder hides specific folders from view.

1. If the Folder List is not visible, on the **View** menu, click **Folder List**.
2. Right-click **Personal Folders** or **CorporateTime - Public Folders**.
3. Select **Properties for Personal Folders** or **Properties for CorporateTime - Public Folders**.
4. On the **IMAP4** tab, and select the folders you would like to subscribe or unsubscribe from.
5. Double-click on a folder to expand it in the list.
6. Use the **Hide** or **Show Sub-Tree** and the **Show** or **Hide Sub-Tree** button to toggle back and forth.
7. Click **OK**.

## Resetting IMAP4 folder lists

Resetting your IMAP4 folder list synchronizes any folder changes you have made using another client, such as subscribing or unsubscribing from folders, with the folder view in your current client.

1. On the **Tools** menu, click **IMAP4 Folders**.
2. Select **Reset Folder List**.

## Security features

## Using SSL/TLS support over IMAP4 and SMTP

Secure Socket Layer (SSL) and Transport Layer Security (TLS) ensure your communications are authenticated and encrypted when you transmit or receive data over the Internet. SSL and TLS also ensure the reliability and the integrity of your server connections.

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **IMAP4** tab or **SMTP** tab, and click **Advanced**.
5. Select the **The server requires a secure connection (SSL)** check box. **Server Port** values can be changed to those specified by your Administrator.

6. Click **OK**.

## Using SMTP authentication

CTOC supports SMTP authentication (SMTP AUTH LOGIN) using base 64 encoding and SASL mechanism for SMTP authentication (PLAIN, CRAM-MD5). With these mechanisms, the user's identity and password are encoded and authenticated with the server before the client can access server information.

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **SMTP** tab, select **The server requires authentication** check box, and click **Settings**.
5. Click **Use same settings as my incoming mail server**, and enter your **Account Name** and **Password**.
6. Select the **Save this password in your password list** check box to avoid entering your password every time you log on.
7. Click **OK**.

## Assigning an IMAP4 server password

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **IMAP4** tab, and enter your **Account Name** and **Password**, or select **Use same settings as my CorporateTime Server**.
5. If you entered your Account Name and Password, select the **Save this password in your password list** check box to avoid entering your password every time you log in.
6. Click **OK**.

## Assigning an off-line folder password

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **Startup** tab, click **Off-line Folder Settings**, and select **Change**.
5. In the **New Password** text box, type a password, and then type the same password in the **Confirm Password** text box.
6. Select the **Save this password in your password list** check box to avoid entering your password every time you log on.
7. Click **OK**.

# E-mail

## Opening a message

1. Click the **Inbox** icon.
2. Double-click the item, or select the item and on the **File** menu, point to **Open**, and then click **Selected Items**.

## Creating a message

1. On the **File** menu, select **New**, and click **Mail Message**
2. Enter the recipient names in the **To**, **Cc**, and **Bcc** boxes, or click **To**, **Cc**, or **Bcc** to select recipients from your CTOC Address lists.
3. Enter the message subject in the **Subject** box.
4. In the text box, type your message.
5. To include an attachment with your e-mail, click **Insert**.
6. Click **File**, select the file from your hard drive and click **Insert**.
7. Click **Send**.

## Replying to a message

1. Open the message you would like to reply to.
2. Click **Reply** to only reply to the message sender, or click **Reply to All** in order to reply to the sender and all message recipients.
3. In the text box, type your message.
4. Click **Send**.

## Copying a message

1. Click the **Inbox** icon.
2. Select the item you would like to copy.
3. On the **Edit** menu, click **Copy**.
4. Select the destination folder.
5. On the **Edit** menu, click **Paste**.

## Moving a message

1. Click the **Inbox** icon.
2. Select the item you would like to move.
3. On the **Edit** menu, click **Move to Folder**.
4. In the **Move Items** window, select the destination folder.
5. Click **OK**.

## Saving a message

1. Select the message.
2. On the **File** menu, click **Save As**.
3. In the **Save** in box, select the file destination.
4. In the File name box, enter a file name.
5. Click **Save**.

## Saving a message draft

1. Select the message.
2. On the **File** menu, click **Save**.

**Note:** Your message will be saved in the **Drafts** folder.

## Deleting a message

1. Click the **Inbox** icon.
2. Select the messages you want to delete.
3. Click the **Delete icon** on the toolbar.

## Viewing a message MIME source

Viewing the MIME source of an e-mail message can help you identify the cause of any irregular behavior associated with an e-mail message.

1. Open the e-mail message.
2. On the **View** menu, select **Message Source**.

## Configuring message delivery attempts

Configuring message delivery attempts allows you to specify the maximum number of e-mail message delivery attempts before Outlook generates a non-delivery report.

1. Right-click the **Outlook** desktop icon, select **Properties**, click **Properties**, and then click the **SMTP** tab.
2. Click **Advanced**.
3. In the **Retry sending unsent e-mail message every** box, enter the time interval to attempt to resend mail.
4. In the **minutes and stop after** box, enter the maximum number of attempts to resend mail.
5. Click **OK**.

## Clearing deleted messages from your Inbox

Clearing deleted messages from your Inbox removes messages that have been deleted using another IMAP4 client. Prior to clearing these items, messages usually appear with a strikethrough the item name.

1. On the **Tools** tab, select **IMAP4 Folders**.

2. Select **Purge Deleted Messages**.

## Saving changes to message attachments

Save changes directly to message attachments from your Inbox.

1. Open the message, click the message attachment icon and click the attachment.
2. Modify the message attachment.
3. On the **File** menu, click **Save** or **Save As**.
4. If your are prompted, select a file location and click **Save**.
5. On the **File** menu, click **Close** or **Exit**.

# Meetings

## Creating a Meeting

1. Click the **Calendar** icon.
2. On the **Actions** menu, select **New Meeting Request**.
3. Enter the **Subject**, **Location**, **Start time**, and **End time**.
4. Select the **Attendee Availability** tab, and click **Invite Others**.
5. Select an attendee or resource list from the **Show Names from the** list.
6. Enter the name in the **Type Name** box, or select the attendee or resource name from **Select from list**.
7. Then, click **Show attendee availability** to view attendee or resource availability.
8. Select **Required**, **Optional** or **Resource**, and click **OK**.
9. Click **Send**.

## Creating a recurring Meeting

1. Click the **Calendar** icon.
2. On the **Actions** menu, select **New Appointment.**
3. Enter the **Subject**, **Location**, **Start time**, and **End time**.
4. Select the **Attendee Availability** tab, click **Recurrence**, enter the recurrence pattern and range of recurrence details, and then click **OK**.
5. Click **Invite Others**.
6. Select an attendee or resource list from the **Show Names from the** list.
7. Enter the name in the **Type Name** box, or select the attendee or resource name from **Select from list**.
8. Select **Required**, **Optional** or **Resource**, and then click **OK**.
9. Click **Send**.

**Note:** Outlook displays Repeating Entries created with the CorporateTime client as individual, unconnected Meetings and Events. All instances of the Meeting or Event are displayed in Outlook, but they are only accessible as separate instances.

## Accepting one or several Meetings

Quickly accept one or several meetings without having to select a response option.

1. Select one or several Meeting invitations in your Inbox or Calendar folder, and right-click.
2. Select **Respond to all by**, and click **Accepting**.

**Note:** You can send comments or e-mail confirmations when you accept or decline single Meeting invitations. Right-click the Meeting invitation and select **Accept**. Select **Edit the response before sending**, **Send the response now** or **Don't send a response**.

## Tentatively accepting a Meeting

1. Right-click or double-click the Meeting invitation in your Inbox.
2. Click **Tentative**.
3. Then, select **Edit the response before sending**, **Send the response now**, or **Don't send a response**.
4. Click **OK**.

## Declining one or several Meetings

Quickly decline one or several meetings without having to select a response option.

1. Select one or several Meeting invitations in your Inbox or Calendar folder, and right-click.
2. Select **Respond to all by**, and click **Declining**.

**Note:** You can send comments or e-mail confirmations when you accept or decline single Meeting invitations. Right-click the Meeting invitation and select **Accept**. Select **Edit the response before sending**, **Send the response now** or **Don't send a response**.

## Inviting external attendees to Meetings

Invite non-CorporateTime users to Meetings by sending e-mail notifications. iCal notification must be enabled to invite non-CorporateTime users to Meetings.

1. Click the **Calendar** icon.
2. On the **Actions** menu, select **New Appointment**.
3. Enter the **Subject**, **Location**, **Start time**, and **End time**.
4. Select the **Attendee Availability** tab, and click **Invite Others**.
5. Select an attendee or resource list from the **Show Names from the** list.
6. Enter the name in the **Type Name** box, or select the attendee or resource name from **Select from list**.
7. Select **Required**, **Optional** or **Resource**, and click then **OK**.
8. Click **Send**.

**Note:** Outlook 98 does not support iCal notification. Support for inviting external attendees is only available when running CTOC on CorporateTime Server 5.1 or greater.

## Sending e-mail notification on Meeting creation

1. Click the **Tools** menu, select **Options**, and then click **Calendar Options**.
2. Click **CorporateTime**, and select the **Send e-mail notification to attendees when a Meeting is created or updated** check box.
3. Click **OK**.

## Sending iCal notifications on Meeting creation

1. Click the **Tools** menu, select **Options**, and then click **Calendar Options**.
2. Click **CorporateTime**, and then select the **Automatically send iCal notification to non-CorporateTime attendees** check box.
3. Click **OK**.

## Setting Meeting reminders

1. Open the Meeting.
2. Select the **Reminder** check box, and enter the amount of time before the Meeting that you would like the reminder to occur.
3. You can customize the reminder sound for this Meeting, by clicking the reminder icon and selecting the reminder sound you would like to play.
4. Click **Save** and **Close**.

## Setting Can't Book Me

1. Click the **Calendar** icon.
2. On the **File** menu, click **Folder**, and then click **Properties for Calendar**.
3. Select the **Permissions** tab, and clear the **Can invite me to Meetings** check box.
4. Click **OK**.

**Note:** This feature is only available when CTOC is connected to CorporateTime Server 5.1.

## Free/Busy lookup for SMTP mail recipients

The Free/Busy lookup feature displays the meeting availability of non-CorporateTime users who have published their free/busy information.

1. Open or create a new contact. To create a new contact, on the **File** menu, select **New**, and then click **Contact**. Enter your contact information.
2. Click the **Details** tab.
3. Under **Internet Free-Busy**, in the **Address** box, type the name of the server, FTP or URL where your contact's free/busy information is stored.
4. Click **Save and Close**.

## All Day Events

## Creating an All Day Event

1. Click the **Calendar** icon.
2. On the **Actions** menu, select **New All Day Event**.
3. Enter the **Subject**, **Location**, **Start time**, and **End time**.
4. Select the **Attendee Availability** tab, and click **Invite Others**.
5. Select an attendee or resource list from the **Show Names from the** list.
6. Enter the name in the **Type Name** box, or select the attendee or resource name from **Select from list**.
7. Select **Required**, **Optional** or **Resource**, and click **OK**.
8. Click **Send**.

## Accepting an All Day Event

1. Right-click or double-click the Day Event in your Inbox.
2. Click **Accept**.
3. Then, select **Edit the response before sending**, **Send the response now**, or **Don't send a response**.
4. Click **OK**.

## Declining an All Day Event

1. Right-click or double-click the Day Event in your Inbox.
2. Click **Decline**.
3. Then, select **Edit the response before sending**, **Send the response now**, or **Don't send a response**.
4. Click **OK**.

## Tasks

## Creating a Task

1. Click the **Task** icon.
2. On the **Actions** menu, select **New Task**.
3. Enter a **Subject**, **Due date**, **Start Date**, **Status**, **Priority** and then enter the Task details in the window.
4. Click **Save and Close**.

## Deleting a Task

1. Click the **Task** icon.
2. Right-click the task, and click **Delete**.

## Address Books

## Downloading a global Address list

Downloading a global Address list provides you with a complete list of users and resources when you work on-line. If you do not download the global Address list, you will have to individually search for each user and resource when you create entries.

1. On the **Tools** menu, select **Options**, and click **Calendar Options**.
2. Click **CorporateTime**, and select the **Load Global Address Lists when working on-line** check box.
3. Click **OK**.

## Downloading Address Book entries off-line

Downloading Address Book entries off-line allows you to access the names and data of select users and resources when you are not connected to the network.

1. On the **Tools** menu, select **Synchronize**, and click **Download Address Book**.
2. In the **Details** section, select **Full** or **None** to specify the amount of details you would like to download off-line.
3. In the **Address Book** section, click **Address Book** and select entries you would like to download off-line. Click **Reset**, if you would like to clear the contents of your off-line Address Book.
4. Click **OK**.

## Specifying the display format for CorporateTime user names

Available display formats for CorporateTime user names are: John C. Doe, Doe John C. and Doe, John C. Display formats are reflected in the CTOC Address book, the To: field of Calendar meetings, and the To:, Cc: and Bcc: fields of e-mail messages.

1. Right-click the **Outlook** desktop icon, and click **Properties.**
2. Click **Show Profiles** and select the correct user profile.
3. Click **Properties**, select **CorporateTime Outlook Connector** and click **Properties**.
4. On the **CorporateTime** tab.
5. Click **Advanced**.
6. Click the **Address Book User Display** pull down menu, and select the display format.
7. Click **OK**.

# Updating CorporateTime user and Resource lists

Updating your CorporateTime user and Resource lists updates your lists with the most recent user and resource information on the server.

1. Right-click the **Calendar** icon, select **Properties** and click on the **Administration** tab.
2. Click **Reset**.

## Adding users to a Personal Address Book

1. On the **Tools** menu, select **Address Book**.
2. Click **File**, and select **New Entry**
3. Select **Other Address** or **Personal Address Book**, and then click **OK**.
4. Enter **Display Name**, **E-mail address** and **E-Mail type**.
5. Click on the **Business**, **Phone Numbers** and **Notes** tab to enter more information.
6. Click **OK**.

# Adding a distribution list to a Personal Address Book

1. On the **Tools** menu, select **Address Book**.
2. Click **File**, and select **New Entry**.
3. Select **Personal Distribution List**, and then click **OK**.
4. In the **Name** field, enter a name for your personal distribution list, and then click **Add/Remove Members**.
5. In the **Show Names from the** list, click **Personal Address Book**.
6. Type or select a name from the list, and then click **Members**.
7. Click **OK**.

# Deleting users from a Personal Address Book

1. On the **Tools** menu, select **Address Book**, and then click **Personal Address Book**.
2. Right-click the name(s) you would like to delete, and select **Delete**.

# Deleting a distribution list from a Personal Address Book

1. On the **Tools** menu, select **Address Book**, and then click **Personal Address Book**.
2. Right-click the distribution list, and select **Delete**.

# Modifying user information in a Personal Address Book

1. On the **Tools** menu, select **Address Book**, and then click **Personal Address Book**.
2. Right-click the name, and select **Properties**.
3. Select the user information to be modified using the **Business**, **Phone Numbers**, **Notes** or **Address** tab.

# Modifying user information in a distribution list

1. On the **Tools** menu, select **Address Book**, and then click **Personal Address Book**.

2. Right-click the name of the distribution list, and select **Properties**.
3. Double-click a user name and select from the **Business**, **Phone Numbers**, **Notes** or **Address** tab to modify user information.
4. Click **OK**.

# Off-line synchronization

## Configuring off-line synchronization

Configuring off-line synchronization lets you select the option of automatically synchronizing your folders on exit, receiving a synchronization prompt before on exit, or automatically synchronizing your folders at a specific time interval.

1. On the **Tools** menu, select **Options**.
2. On the **Mail Services** tab, select the **Enable off-line access** check box.
3. Select one of the following options:

- **When on-line, synchronize all folders upon exiting**:
- Select **Automatically** to automatically synchronize folders on exit.
- Select **Prompt** to be prompted to synchronize folders on exit.
- **When on-line, automatically synchronize all off-line folders**, to synchronize folders at a specified time interval. Then select a time interval.

4. Click **OK**.

## Selecting folders for off-line synchronization

Selecting folders for off-line synchronization lets you select single or multiple folders for automatic synchronization or manually synchronize single or multiple folders.

### Automatic single folder synchronization

1. Right-click the folder you want to synchronize, select **Properties**, and then click the **Synchronization** tab.
2. Select the **Can be used off-line** check box.
3. Click **OK**.

### Automatic multiple folder synchronization

1. On the **Tools** menu, select **Synchronize**, and then click **Off-line Folder Settings**.
2. Select the check box next to the folder(s) you want to synchronize. You may also double-click on a folder to expand it in the list, and then select the sub-folder you want to synchronize.
3. Click **OK**.

### Manual folder synchronization

1. On the **View** menu, select **Folder List**, and then click the folder(s) you want to synchronize.
2. Click the **Tools** menu, point to **Synchronize**, and click **This Folder** or **All Folders**.

## Creating a synchronization filter

Creating a synchronization filter lets you synchronize items based on a specific time frame, unread or read status, importance level, size, keywords or user names.

1. On the **Tools** menu, select **Synchronize**, and then click **Off-line Folder Settings**.
2. Click the folder you want to filter, and then click **Filter Selected Folder**.
3. Select the filter options you want.
4. To filter using additional criteria such as a category or importance level, click the **More Choices** tab, and then select the options you want.

**Note:** Synchronization filters can only be edited while connected to the network.

## Skipping a folder during synchronization

Skipping a folder during synchronization, saves time if you are synchronizing large folders, or if you do not need the folder off-line.

- Click **Skip** when the name of the folder appears in the synchronization dialog box.

## Changing the location of off-line files

1. Right-click the **Outlook** desktop icon, select **Properties,** and then click **Properties**.
2. Click the **Startup** tab, and then click **Off-line Folder Settings**.
3. Enter the desired location of your off-line file, or click **Browse** to select a location.
4. Click **OK**.

## Resetting off-line folders

Resetting your off-line folders deletes the contents of your off-line folders and synchronizes your off-line folders with the server.

1. Right-click the **Inbox** icon and select the **Administration** tab.
2. Click **Reset**.
3. Click **OK**.

## Deleting off-line folders

Deleting your off-line folders deletes your off-line folders.

1. Right-click the **Inbox** icon and select the **Administration** tab.
2. Click **Delete**.
3. Click **OK**.

## Permissions and Delegate Access

## Assigning Permissions

Assigning Permissions lets you assign viewing rights to specific Calendar and Task folders.

1. On the **File** menu, select **Folder**, and click **Properties**.
2. Click the **Permissions** tab, select a person from the list box, or click **Add** to choose another user.
3. Select a role for that person from the drop-down list box. **Owner** gives the selected user full viewing rights (using CorporateTime native clients only); **None** completely blocks the selected user from seeing any Tasks or Calendar entries. **Custom** allows you to mix and match settings according to sensitivity level.
   In the Calendar folder, **Times Only** allows the selected user to view the times of your Meetings, but no details or other information.

## Granting Delegate Access

Granting Delegate Access allows you to provide specific users with access to your Calendar, Tasks, Notes, Journal and Inbox folders. You must connect to the network in order to grant Delegate Access.

1. On the **Tools** menu, select **Options**, and then click the **Delegates** tab.
2. In the **Delegates** box, select the delegate name, or click **Add** to select from the list.
3. Click **Permissions** and then use the drop-down list to assign Delegate Access to your Calendar, Inbox, Journal, Notes and Tasks.

**Note:** To send e-mail on your behalf, delegates requires access to an IMAP4 server with support for ACLs. Assigning the role of Editor grants full designate rights.

## Setting sharing permissions for folders

Setting sharing permissions for folders grants users access to the specific folders.

1. If the Folder List is not visible, click the **View** menu, click **Folder** List, and then select the folder you want to share with another person.
2. Right-click the folder you want to share, and then select **Properties**.
3. Select the **Permissions** tab.
4. Click **Add**.
5. In the **Name** box, type the name of the person you would like to grant sharing permissions, or click **Address Book** to select a name from the list.
6. Click **OK**.
7. In the **Name** box, select the name of the person you just added.
8. In the **Roles** box, select the permissions you would like to assign, or use the **Permissions** box to assign custom permissions to the user.
9. Click **OK**.

## Opening another user's folders

Open and view the folders of CorporateTime users that have granted you sharing or delegate access. The folders of other users will be displayed in a separate window and the name of the folder owner will appear in the window's title bar. Supported folders are: Calendar, Inbox, Journal, Notes and Tasks.

1. On the **File** menu, select **Open**, and then click **Open User's Folder**.
2. In the **Name** box, type the name of the person who granted you sharing or delegate access permission, or click **Name** to select from the list.
3. In the **Folder** list, select the folder you would like to open.
4. Click **OK**.

**Note:** You can only access the folders of other users while working on-line. CorporateTime Server 5.1 or later is needed to access the data of other users. You will also need an IMAP4 server with support for Access Control List (ACL) to access the e-mail of other users.

# Outlook with CorporateTime

## Collaborating with CorporateTime native clients

CorporateTime Outlook Connector allows Outlook users to manage their time and activities effectively in collaboration with users of any CorporateTime native client on the same network.
The interoperability of Outlook and CorporateTime involves a few mapping issues. Click one of the following links for details:

- Ownership
- Mapping of importance levels
- Mapping of entries
- Mapping of sensitivity/access levels

## Ownership

CorporateTime Server keeps a record of ownership, similar to Outlook's concept of organizers for every item added to its database. Only the original creator of an entry can modify or delete that Entry unless the user has Delegate Access or Sharing Permissions.
If you attempt to delete a Meeting or Event that you do not own, it will disappear from your Calendar, but will not be not removed from the server database. Instead, your attendee status will be set to Declined, and the Meeting or Event will remain in your Deleted Items folder.
If you attempt to move a Meeting or Event that you do not own by clicking and dragging it to a new time, the original version will remain in your Calendar as originally proposed. A copy, owned by you, will be created according to your new specifications, to which all original attendees will be invited. Outlook will prompt you with the following message:
You may want to let the Meeting organizer know you changed the Meeting "Title". If the Meeting organizer sends an update for this Meeting, your changes will be lost. Is this OK?
Since you are not modifying the original Meeting or Event, but rather creating a new one, your copy will not be deleted if the original organizer sends an update. Click **OK**.

Outlook will now prompt you with the following message:

Your changes could not be saved because you don't have permission to modify some or all of the items in this folder. Do you want to save a copy of this item in the default folder for the item?

Click **Yes** to create your altered copy of the original Meeting or Event. Click **No** to return to your Calendar without creating the copy.

Changing a Meeting or Event's free/busy display, reminders, and privacy level by using the right-click pop-up menu will not create a new copy. In this case, however, your changes will be lost if the organizer sends an update.

## Mapping of importance levels

Mapping of importance levels reflects client to server and server to client mapping of Outlook and CorporateTime Server calendar items. Importance level mapping determines how the importance level of an entry will be interpreted and displayed by Outlook and CorporateTime Server.

### From client to server:

| Outlook | CorporateTime Server |
|---|---|
| High | High |
| Normal | Normal |
| Low | Low |

### From server to client:

| CorporateTime Server | Outlook |
|---|---|
| Highest | High |
| High | High |
| Normal | Normal |
| Low | Low |
| Lowest | Low |

## Mapping of entries

Mapping of entries reflects the client to server and server to client mapping of Outlook and CorporateTime Server calendar items. Entry mapping determines how the entry type will be interpreted and displayed by Outlook and CorporateTime Server.

### From client to server:

| Outlook | CorporateTime Server |
|---|---|
| Meeting | Meeting |
| Appointment | Meeting (with no other people or resources invited) |
| All-Day Event | Day Event |
| Holiday | Day Event |
| Task | Task |
| Recurring Meeting, All-Day Event | Repeating Meeting, Day Event |

| | |
|---|---|
| Recurring Task | Unconnected (non-Recurring) Tasks |

### From server to client:

| CorporateTime Server | Outlook |
|---|---|
| Meeting | Meeting |
| Day Event | All-Day Event (time shown as Busy) |
| Daily Note | All-Day Event (time shown as Busy) |
| Holiday | All-Day Event (time shown as Free) |
| Task | Task |
| Repeating Meeting, Day Event or Daily Note | Unconnected (non-Recurring) Meetings and All-Day Events |

## Mapping of sensitivity/access levels

Mapping of sensitivity and access levels reflects the client to server and server to client mapping of Outlook and CorporateTime Server calendar items. Sensitivity/access level mapping determines how the privacy level of an entry will be interpreted and displayed by Outlook and CorporateTime Server.

### From client to server:

| Outlook | CorporateTime |
|---|---|
| Normal | Normal |
| Private | Personal |
| Personal | Personal |
| Confidential | Confidential |

### From server to client:

| CorporateTime | Outlook |
|---|---|
| Public | Normal |
| Normal | Normal |
| Personal | Private |
| Confidential | Personal |

## Attendee availability

When you plan a Meeting or view attendee availability, CorporateTime Outlook Connector automatically downloads the free/busy information for each attendee from the CorporateTime Server's calendar database, and displays it in the time-line.
Accepted Meetings will appear as busy, tentative or out-of-office time, depending on your selection. Unconfirmed Meetings (which have been scheduled but not yet accepted by the invitees) will appear with white cross-hatching.

## Attendee response

With CorporateTime Outlook Connector, you can view up-to-date responses from all attendees of Meetings and Events that you have created. These responses are automatically updated from the CorporateTime Server calendar database when you view the Attendee Availability tab of a Meeting or Event that you have created.

## Configuring Add-Ins

To maximize the features and performance of CTOC, certain Outlook Add-Ins and preferences must be modified. Service providers like CorporateTime Outlook Connector or Exchange supply the Outlook client with certain Add-Ins and COM Add-Ins that extend the range and functionality of the application. You should remove Microsoft Exchange specific Add-Ins when running CTOC.

### Add-Ins

1. On the **Tools** menu, click **Options.**
2. Select the **Other** tab, and click **Advanced Options.**
3. Click **Add-In Manager**.
4. Clear the **Exchange Extensions property pages** check box in the list.
5. Select the other check boxes, and then click **OK**.

**Note** If the CorporateTime Add-In is not listed, you must install it.

### COM Add-Ins (Outlook 2000 only)

1. On the **Tools** menu, click **Options**.
2. Select the **Other** tab, and then click **Advanced Options**.
3. Click **COM Add-Ins**.
4. Select the check boxes in the list, and then click **OK**.

**See also:**
Selecting your default service provider

## CorporateTime UID login support

UID Login support extends the range of Account Name formats that can be used to login to CorporateTime Server. To enable UID Login support, please contact your server administrator.

## Deleted Items

All Calendar entries that you delete or decline are moved to your Deleted Items folder. CorporateTime native clients will display your response to these Meetings as "Refused". If you remove a Meeting or Event from your Deleted Items folder, it will be deleted from CorporateTime Server. The Calendars of all attendees will be updated with the deletion.

## Installing the CorporateTime Calendar Form

The CorporateTime Calendar Form lets you view the Attendee Availability and Attendee

Status of other users. The CorporateTime Calendar Form must be installed in your Calendar folder.

### Verifying the form installation

1. Right-click the **Calendar** icon.
2. Click **Properties**, and then select the **Forms** tab.
3. If CorporateTime is not listed in the box labeled **Forms associated with this folder**, you must install it.

### Automatically installing the form

1. Right-click the **Calendar** icon.
2. Click **Properties**, select the **Forms** tab, and then click **Manage**.
3. Select the **Publish Form Automatically** check box.

### Manually installing the form

1. Right-click the **Calendar** icon.
2. Click **Properties**, select the **Forms** tab, and then click **Manage**.
3. Select **Install**, and the CorporateTime name and description will appear.
4. Click **Close**, and the CorporateTime Calendar Form should now be listed in the **Calendar Properties** dialog box.
5. Click **OK**.

## Installing the CorporateTime Add-In

The CorporateTime Add-In must be installed for CorporateTime Outlook Connector to function correctly.

1. On the **Tools** menu, and click **Options**.
2. On the **Other** tab, select **Advanced Options**.
3. Click **Add-In Manager**.
4. Click **Install**.
5. In the Install Extension dialog box, click the file "cstms.ecf". If this file is not present, you may have to re-install CTOC. See the readme file for instructions.
6. Ensure that the CorporateTime option is selected within the Add-In Manager list box.

## Opening Calendar items

1. Click the **Calendar** icon.
2. Double-click the item, or select the item and on the **File** menu, point to **Open**, and then click **Selected Items**.

## Properties dialogs

Permissions allow you to specify the access other users have to your information.
The Forms tab allows you to install the CorporateTime Calendar Form. This form must be installed.
The properties dialog box for CorporateTime public or private folders allow you to select

the IMAP4 folders you wish to show or hide.
Administration tabs are created by Microsoft Exchange and are not currently supported by CorporateTime Outlook Connector.

## Repeating entries

Outlook displays Repeating entries created with the CorporateTime client as individual, unconnected Meetings and Events. All instances of the Meeting or Event are displayed in Outlook, but they are only accessible as separate instances.
CTOC does not currently support the ability to create recurring Tasks.

## Refreshing mail and Calendar items

Pressing F5 or selecting the Send and Receive command refreshes your folders with new information on the server. This command has multiple functions with CorporateTime Outlook Connector:

- Refreshing your Inbox with newly-arrived e-mail and Calendar entries
- Sending any remaining messages in your Outbox
- Refreshing your Calendar with new changes
- Refreshing your Deleted Items by removing any Calendar Events that you have declined or deleted, or that have been deleted by their Owners.

## Rules

Server-side rules require the Microsoft Exchange Server, and cannot currently be set or carried out when running CorporateTime Outlook Connector. This includes all server-side options formerly available using the Rules Wizard, as well as the Out of Office Assistant.
Client-side rules function normally.

## Updating folder contents

1. Right-click the desired folder, click **Properties**, and then select the **Administration** tab.
2. Click **Reset**.

## Where did my Contact's attachment go?

Although they can be added normally, CorporateTime Outlook Connector does not currently support the ability to save attachments with Contacts.

## Why can't I AutoPreview my messages?

When AutoPreview is selected, Outlook opens local copies of all messages within the current folder, and displays the first three lines of each message.
IMAP-compliant e-mail servers download the headers of your messages, leaving the full text stored on the server. No local copies of your messages exist for Outlook to open.
It is still possible to select AutoPreview from the View menu, but the folder display will

continue to show only the headers of your messages.
CorporateTime Outlook Connector supports the Preview Pane.

## Why can't I see Category headers?

CorporateTime Outlook Connector does support the ability to view your messages by category within all folders. However, the expandable row separators normally shown in this view are created by Microsoft Exchange, and are not implemented in this release of CorporateTime Outlook Connector.

## Why can't I specify certificates for Contacts?

CorporateTime Outlook Connector does not currently implement the same security features as Microsoft Exchange. Certificates (digital ID's) are not available for use in this release.

## Why doesn't my contact's Journal tab work?

The Journal tab is currently unavailable when viewing contacts using Outlook 98.

## Why can't I customize my current view?

The current view can be customized in any way permitted by the View Summary dialog box (View, Current View, Customize Current View). The sole exception is that no grouping features are implemented in this release of CorporateTime Outlook Connector. If you attempt to change the settings in the Group By dialog box, you will receive the following message when you click OK in the View Summary:

The sorting or group by operation failed. Either these folders do not support sorting or the conditions are too complex. Sorting and group by settings have been reset.

Ensure that the **Group By** value in the View Summary dialog box is set to **None** before clicking **OK**.

## Why can't I detect and repair a folder?

CorporateTime Outlook Connector does not currently support the Inbox Repair utility.

## Why can't I use Mail Merge?

The ability to merge contact lists with external Word files is not supported in this release of CorporateTime Outlook Connector.

## Why can't I set reminders on my messages?

The ability to set reminders on mail messages is not supported in this release of CorporateTime Outlook Connector.

## Why can't I change a Meeting into an All Day Event?

The ability to change a Meeting into an All Day Event and an All Day Event into a Meeting is not supported in this release of CorporateTime Outlook Connector.

## Why can't I recall a message?

The Message Recall relies on the Microsoft Exchange Server. It is therefore unavailable when using CorporateTime Outlook Connector.

## Why can't I move/rename/delete this folder?

CorporateTime Outlook Connector does not allow you to move, rename or delete any of the Outlook folders:

- Outlook Today
- Inbox
- Calendar
- Contacts
- Tasks
- Journal
- Notes
- Deleted Items
- Sent Items
- Outbox
- Drafts

Other folders may be modified.

## Why can't I create a new folder?

New folders you create in your CorporateTime profile or in a public folder on the e-mail server may only contain mail items. Ensure that the "Folder contains:" field of the Create New Folder dialog box is set to "Mail Items" before clicking OK.
Personal folders you create locally on your machine may contain any kind of items.

## Why can't I view attendee availability and response?

If you cannot view attendee availability or attendee response (for Meetings and Events that you have created), it is possible that the CorporateTime Calendar Form is not correctly installed
For more information, click here.

## Why can't I set reminders on recurring meetings?

The ability to set reminders for recurring meetings, appointments and events is not supported in this release of CorporateTime Outlook Connector.

## Why can't I delete an attachment from a task?

The ability to delete attachments from tasks is not supported in this release of CorporateTime Outlook Connector.

## Why can't I attach an OLE object?

The ability to set an OLE-style attachment is not supported in this release of CorporateTime Outlook Connector.

## Why can't I receive read and delivery receipts?

CorporateTime Outlook Connector will process your requests for read and delivery receipts normally. However, these requests may or may not be honored by the IMAP e-mail server and the SMTP e-mail delivery server that handle your messages on the way to their destination.
Some mail servers cannot process read and delivery receipts. Others with virus checking software installed may consider the code for your request to be a potential virus hazard, and delete it.
If you are not receiving read and delivery receipts, see your system administrator.

## Why can't I recover deleted items?

The ability to recover deleted items is an extension of Microsoft Exchange that is currently not supported by CorporateTime Outlook Connector.

## Why can't I send a link to this folder?

The File menu command "Send Link to this Folder" is currently unavailable with CorporateTime Outlook Connector.

## Why can't I set Send Options for new messages?

The ability to set formatting, delay and expire options using the Send Options dialog box is not currently supported by CorporateTime Outlook Connector.

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