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Calendar Browser V7, User manual

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1 INTRODUCTION

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Use *Calendar Browser* for Outlook when you want to book any kind of resource within your organization. It could be rooms, cars, machines or even people. *Calendar Browser* is an add-on to Outlook, so you don't have to learn a new program to make the bookings. **In** *Calendar Browser* **each resource has its own calendar, and when you book a resource you make an appointment in that calendar**.

Most of the installation is done centrally by the server administrator, but you have to install a minimal client tool to use *Calendar Browser*, see Install *Calendar Browser Client* below.

For simplicity we talk about booking rooms in this manual. Your organization might use *Calendar Browser* for booking of other resources, but the principles are the same.

Most of the screenshots in this manual comes from Outlook 2010, but where there is a significant difference we show 2007 also.

2 CALENDAR BROWSER IN OUTLOOK

2.1 THE CALENDAR VIEW

Outlook has a navigation tree to the left on the homepage. If you don't see it, click the button Folder list in the left corner of the screen or click View and choose Navigation Pane. You'll find *Calendar Browser* among your calendars.



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2.2 THE CALENDAR BROWSER FOLDER

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There is also a *Calendar Browser* folder among the Mail folders, but you should never use that folder for bookings.

0 = 1			Cars -	Mailbo	x - kalmstrom.com	- Micro	soft
File Hon	File Home Send / Re		Folder	View	Developer		}
New New E-mail Items •	© ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	Post Reply	🚑 Reply	i ≣e +	ि To Manager Team E-mail ✓ Done	* * 	
New	Delete		Respond		Quick Steps	E.	j j
 Favorites Inbox Sent Iter 	Search	n Cars (Ctrl+E) dar Browser					
 Mailbox - kalr Inbox Cars 	nstrom.com	Goto	the Outlook (Calenda	r view to use Calend	ar Brows	er

3 INSTALL CALENDAR BROWSER CLIENT

Before you start using *Calendar Browser* you have to install the Client, if that has not already been done by the administrator. *Calendar Browser* should prompt you to install it, and then you just have to click Yes. From your local machine you may also go into the central installation folder and run the file **CBClientSetup.exe.** Close Outlook before you start the installation.

📸 Calendar Browser Client - InstallShield Wizard							
Welcome to the InstallShield Wizard for Calendar Browser Client							
	The InstallShield(R) Wizard will install Calendar Browser Client on your computer. To continue, click Next.						
	WARNING: This program is protected by copyright law and international treaties.						
< Back Next > Cancel							

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When you click Next you are asked to select folder for the Client installation. If you don't select another folder, the Client will create a **kalmstrom.com** folder under **Program Files** and install *Calendar Browser Client* there.

📸 Calendar	Browser Client - InstallShield Wizard							
Destination Folder Click Next to install to this folder, or click Change to install to a different folder.								
	Install Calendar Browser Client to: C:\Program Files\kalmstrom.com\Calendar Browser Client\ Change							
InstallShield -	< Back Next > Cancel							

Click Next again and then Install:

😸 Calendar Browser Client - InstallShield Wizard
Ready to Install the Program The wizard is ready to begin installation.
Click Install to begin the installation.
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
InstallShield

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The installation starts. During the installation, the installer also sets the .NET execution rights by running 3–4 command prompt windows for a few seconds. They can be seen as black screens behind the installer window.

😸 Calendar	r Browser Client - InstallShield Wizard								
Installing The prog	Installing Calendar Browser Client The program features you selected are being installed.								
17	Please wait while the InstallShield Wizard installs Calendar Browser Client. This may take several minutes.								
	Status:								
	Updating component registration								
InstallShield -									
	< Back Next > Cancel								

You will be told when the installation is completed. Then, just click Finish and you are ready to start using *Calendar Browser*. Congratulations!

😸 Calendar Browser Client - I	nstallShield Wizard							
InstallShield Wizard Completed								
	The InstallShield Wizard has successfully installed Calendar Browser Client. Click Finish to exit the wizard.							
	< Back Finish Cancel							

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4 BROWSING ROOMS

4.1 ADD CALENDAR GROUP



The first time you use Calendar Browser you might need to add the Calendar Group(s) you wish to use for bookings. This is done with the button in the new Calendar Browser toolbar in the Outlook Calendar View.

4.2 SEVERAL CALENDAR GROUPS

If you have several Calendar Groups you will have two different toolbars in Outlook: (The Manage and Overview buttons might be hidden by the administrator.)

When no calendar in any of the Calendar Groups are selected, the *Calendar Browser* toolbar gives a possibility to either add a Calendar Group or to select to work with one.



When calendars in only one Calendar Group are selected, the *Calendar Browser* Outlook toolbar will look like in the image below and the buttons will work for only that group.





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4.3 SEE RESOURCES

To **see** calendars, select the calendar(s) in the list that you wish to see.

How many rooms you can see at the same time depends on the resolution of your computer screen. A screen of 1024x768 shows three rooms and if you have chosen more than three you must use the scrollbar to see them.

4 🔳 Calendar Browser	
✓ Basement	
Cafeteria Level 2	
Cafeteria Level 4	
Conf Room A	=
Conf Room B	
🔲 Gymnasium	
Pantry	
Projection Room	
Reception Area	
Terrace	

4.4 VIEWS

You can choose between different views, day, week or month, just like you do in your own Outlook calendar. Select a room in the list and click the desired view in the Outlook toolbar.



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4.5 SEARCH FOR ROOMS

You can search for rooms that are free at specific dates and times and have as many seats as you need.



Click the Search button in the ribbon, and the Search dialog is shown. Specify date and time and how many seats you need. Then all the free rooms with the desired number of seats or more are shown in the room list.

By clicking the question mark (?) you can see a description of the selected room.

Select one of the resources and click New, and a new appointment for the selected time in the calendar of that resource will be opened.

NOTE that both the Overview and the Manage button can be hidden by the administrator. You might only see the Search and the Description buttons in your Outlook.

🔯 Search Calendars	X
Date: 11/16/2010 💌	Search
Time: 19 💌 - 20 💌	Clear Search
Seats: 150	
Calendars found:	?
Terrace Reception Area Projection Room Gymnasium Conf Room B Conf Room A Cafeteria Level 4 Cafeteria Level 2 Basement	_
New	Cancel

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4.6 SEE DESCRIPTIONS OF ROOMS

Which one of the free rooms is best for you? To decide this you can look at the descriptions of the rooms by clicking the Description button in the ribbon.

Select a room, click the button and the description comes up!





Clearance from CEO required before usage

In Outlook 2007 the toolbar buttons look like this:



5 BOOKING

5.1 BOOK A RESOURCE

Book the resource by selecting it in the Resource list and making an appointment. You make the appointment as usual, by clicking on an empty space in the calendar. A common Outlook calendar form opens, and you can fill out time and other booking information, such as project. You may also book additional services or supplies. When you are finished, click Save and Close.

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							-	~
	■ (=	idget Meeting betweenSigg	e Kalmstrom and Andrew Ful	ler - Appointment		-		^
	Appointment Insert	Format Text Add-Ins						0
Save & Close Att	Save & Invite Copy to My Scheduling Assistant Book Book Options Spelling							
	Actions	Show	Calendar B	rowser		Proofing		
Quarterly	Review							
Subject:	Budget Meeting betweens	Sigge Kalmstrom and Andrew	v Fuller					
Location:								-
Start time:	Wed 4/22/2009	▼ 11:00 AM ▼	🗖 All day event					
End time:	Wed 4/22/2009	▼ 12:00 PM ▼						
In Shared F	older: 🧱 Reception Area	in Public Folders		Last modified by	Administ	rator on Th	nu 2:4	9 AM

You can also book a room from the Overview, see 6.5

5.2 BOOK SUPPLIES

At the same time as booking a room you can book supplies for the meeting by clicking the button Book Supplies.



You will then be presented with a dialog where you can select what you need more than the resource you are booking. Define another number than 0, and the item will be booked.

Then also fill out your name and – if you wish – comment your order and select among the place settings defined by the administrator.

It might be mandatory to specify Cost Center. This is also defined by the administrator. If Cost Center is mandatory, you cannot save the booking without filling it out.

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eaco	ock, Margaret			1/2/2012 12:07:46 PM	
	Item	Rate	# of items		
	Coffee	5	0		
	Теа	3	0		
	Water	2	0		
	Notepads	4	0		
	Cookies	2	12		
	Biscuits	5	0		
	Snacks	7	0		
•	Writing Instruments	8	2		
	Projectors	20	0		
	Cars	200	0		
	Petty Cash	45	0		Ļ
	File Folders	5	0		
ommo	ent to Order		×	Total 14 Place settings Cost Center	

5.3 PROJECT

The administrator might have predefined projects and maybe also made it mandatory to select a project for each booking.

Click the arrow to see the project list and select the project you will make the appointment for.



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	954	😻 🗧 Intern	al Review N	leeting betw	een Michael Su	iyama A	λ	×
	Appointment	Insert Fo	ormat Text	Add-Ins				0
Actions St	now * Book Supplie	s Calend	ect: IT Syste Investo New Pr Creativ Sales P	ms Review r Interaction oduct Desigr e Brief Discus itch Brainstor	n ssion rming Session	ABC Spelling Proofing		
Π Systems	Review		HR Perf	ormance Rev	view			
Subject: Location: Start time: End time:	Internal Revie Mon 5/4/2009 Mon 5/4/2009	ew Meeting betw	een Empoly Recreat Diversit Supply Employ Quarte CEO Ac	ee Counsellin tional Outing fication Plans Chain Manay ee's Families rly Review Idress	ng ; Discussion ; Discussion gement Get-together			
In Shared F	older: 🧱 Pr	ojection Room ir	n Public Fold	iers Las	st modified by A	dministra	tor on Thu	▼ 2:45 AM

5.4 INVITE ATTENDEES.

If you want to invite attendees directly in the *Calendar Browser* booking sheet, you must know if the *Calendar Browser* calendars are in the form of mailboxes or public folders. Ask the administrator!

If your *Calendar Browser* calendars are mailboxes you can invite attendees at the same time as you book the recources.



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If the calendars are public folders you must go to your personal calendar and invite the attendees from there.

÷.

5.5 CANCEL A BOOKING

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If you want to cancel a booking, you just delete it. Select the appointment, right click and choose Delete.

If you have ordered any supplies with your booking, that order will also be cancelled.

10 00	Budget	Meet	ing
	Kula and		Quick Print
11 ⁰⁰		<u>22</u>	I <u>n</u> vite Attendees
			For <u>w</u> ard
12 ^{pm}	Project Delegat	<u>.</u>	Pri <u>v</u> ate
	Nancy D	-	Show As ▶
100			Ca <u>t</u> egorize
		N	One <u>N</u> ote
2 ⁰⁰	Budget	X	Delete
	Tasks: 10	ACLIN	e tasks, o completed tasks

6 OVERVIEW

Through the Overview button, you can also an overview over future bookings. The orders for each room and meeting are also listed here. The administrator can hide the Overview button, so you might not see it. In that case you cannot use the Overview.

Search	Description	Overview	Manage		
Calendar Browser					

6.1 CHOOSE DATE AND PERIOD

Specify what date you are interested in and choose period, see the image below. The current day is set by default.

1	Calendar Brow	ser Overvi	ew		
	3/24/2009		Update data	Print	
	Timeline Day	Week I	Week II Week III	Month Day list	Appointments report

6.2 DESIGN ALTERNATIVES

The views can be in the form of color codes or in text form. These color codes and the images are set by the administrator.

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111	Calend	ar Brow	ser Ove	rview								- ¢	×
	3/28/200)9		Update	e data	Print							
	Timeline	Day	Week	I Week II	Week III Mo	nth Day list	Appointments re	eport					
								28 March					
				10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	
			Cafeteria L			Client Brief t			Call to Laura	Performance			=
			Cafeteria L	Call from Rol		Sales Pitch b			Video Confer	Sales Pitch b			
		2	Conf Room A								Teleconferer		
	-	5	Conf Room B	Sales Pitch b		Performance		Trip to HQ by			Budget Meet		× H4 4
			Gymnasi				Trip to HQ by				Project Task		▼ ¥ ¥ +
	<							1				>	

By selecting an appointment you can show the details for that appointment.

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The alternatives without color codes have more textual information.

II Calendar Browser Overview					X				
3/24/2009 Updat	e data Print Week III Month Day liet Ar								
Monday	Tuesday	Wednesday	Thursday	Friday					
Cafeteria Level 05:00-06:00 2 Visit to Retailers by Ma Fleming	01:00-02:00 Video Conference between Peter Kalmstrom, Vikram Malik and Bahrur Ipham 07:00-08:00 Project Tasks Delegation by Nancy Davolio	01:00-02:00 Trip to HQ by Janet Levering 06:00-07:00 Project Tasks Delegation by Nancy Davolio	06:00-07:00 Video Conference between Peter Kalmstrom, Vikram Malik and Bahrur Ipham	09:00-10:00 Call to Laura Callahan <u>11:00-12:00</u> Teleconference with Raisa Zvareva <u>02:00-03:00</u> Performance Review by Steven Buchanan <u>04:00-05:00</u> Performance Review by Steven Buchanan	Ш				
Cafeteria Level <u>12:00-01:00</u> Sales Pitch by Andrew McCarthy <u>01:00-02:00</u> E-mail to Anne Dodswo <u>04:00-05:00</u> Project Tasks Delegati by Nancy Davolio	12:00-01:00 Performance Review by Steven Buchanan 01:00-02:00 rth Trip to HQ by Janet Levering 06:00-07:00 Performance Review by Steven Buchanan	06:00-07:00 Video Conference between Peter Kalmstrom, Vikram Malik and Bahrur Ipham	10:00-11:00 Teleconference with Raisa Zvareva 02:00-03:00 Internal Review Meeting between Michael Suyama and Stina Stensson 05:00-06:00 Client Brief to Margaret Peacock	01:00-02:00 Project Tasks Delegation by Nancy Davolio 06:00-07:00 Performance Review by Steven Buchanan					
Conf Room A <u>11:00-12:00</u> Teleconference with R Zvareva	01:00-02:00 Internal Review Meeting between Michael Suyama	12:00-01:00 Call from Robert King 03:00-04:00	<u>11:00-12:00</u> Visit to Retailers by Martin Fleming	<u>11:00-12:00</u> Client Brief to Margaret Peacock					

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6.3 DAY LIST

The Day list shows information about all bookings on the day you decide. Click on the plus sign to the left of the appointment, and the supply orders are shown.

Calendar Browser Overview											
/29/20 ìmeline	009 🛛 🐨 🗌	Update data ek II Week II	Print I Month Day list	Appointments	report						
rag a	column header here to gr	oup by that co	lumn								
Sub	oject		Project			Cal	Sta	End	. Boo	Ite	Amo
± c	Call from Robert King		Recreational O	uting Discussio	on	Projec	10:00	11:00	Ipham	\$160.00	\$663.00
• 🖻 P	Performance Review by St	even Buchanar	n Supply Chain №	1anagement		Recep	11:00	12:00	Kalmst	\$38.00	\$252.00
	Orders										
	् Item		# of items		Rate Amount						
	Writing Instruments		3		\$8.00				\$24.00		
	Water		7		\$2.00			\$14.00			
⊕ P	Project Tasks Delegation b	y Nancy Davoli	io New Product D	esign	Cafet 12:00 13:00 Kula,			Kula,	\$84.00	\$287.00	
⊕ c	Call to Laura Callahan		Diversification	Diversification Plans Discussion		Conf	12:00	13:00	Peaco	\$897.00	\$1712.00
🗄 Call to Laura Callahan			New Product D	New Product Design		Terrace	12:00	13:00	Davoli	\$3084	\$3691.00
Trip to HQ by Janet Leverling			Recreational O	Recreational Outing Discussion		Cafet	13:00	14:00	Callah	\$124.00	\$241.00
⊕ Call from Robert King			Quarterly Revi	Quarterly Review		Projec	13:00	14:00	Davoli	\$195.00	\$698.00
			New Product D	New Product Design		Recep	13:00	14:00	Dodsw	\$20.00	\$234.00
± V	/isit to Retailers by Martin	Fleming	Employee's Far	nilies Get-toge	ther	Conf	14:00	15:00	Dodsw	\$26.00	\$841.00
Call to Laura Callahan			Quarterly Revi	ew		Conf	14:00	15:00	Dodsw	\$380.00	\$624.00

6.4 ORDERS REPORT

In the Orders Report you can see all appointments that have bookings of Supplies.

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Calendar Browser Overview								
7/16/2009 Update Update	Print nts report Orders report							
From: 7/16/2009 V To: 7/16/200	9 🗸							
Trip to HQ by Jane	t Leverling							
Resource Name: Receptio	n Area	Deeled here	·					
Time: 14:00 15:00	semug	Amount	\$1075.00					
Item description	# of items	Rate	Amount					
Cars	3	\$200.00	\$600.00					
Projectors	9	\$20.00	\$180.00					
Projectors	3	\$20.00	\$60.00					
Cookies	11	\$2.00	\$22.00					
		Tota	1 \$862.00					
Internal Review Me	etina between Micha	ael Suvama a	and Stina Ste	ensson				
Resource Name: Cafeteria	a Level 4	ł						
Project: CEO Address		Booked by: 0	Callahan, Laura					
Time: 16:00 17:00		Amount:	\$248.00					
Item description	# of items	Rate	Amount					
Biscuits	9	\$5.00	\$45.00					
		Tota	ıl: \$45.00					
Video Conference b	oetween Peter Kalms	trom, Vikram	Malik and	Bahrur				
<u>Ipham</u>								
Resource Name: HelpDes	Resource Name: HelpDesk							
Project: Diversification F	lans Discussion	Booked by: I	eacock, Margaret					
< 10 me 10 m 17 m		ranoun.	52504.00	>				

6.5 BOOK FROM WITHIN THE OVERVIEW

Book a resource from within the overview by double clicking an empty space in one of the views. An appointment is opened for the room and time you selected, and you can book the resource with supplies and project just as you do from the Calendar.

6.6 OPEN AN APPOINTMENT

Open an appointment by double clicking a booked space in one of the views.

6.7 PRINT

Print the overview by clicking on the print button.

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7 REMOVE CALENDAR BROWSER CLIENT

If you need to uninstall the *Calendar Browser Client,* go to the Control Panel, select Add-Remove programs (or Programs and Features for Vista). Click on the Calendar Browser Client and when the dialog comes up, choose the alternative Remove.



Programs and Features	
Are you sure you want to uninstall Calendar	Browser Client?
In the future, do not show me this dialog box	Yes No

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