

AGENDA
GROUP CALENDARING MADE EASY

AgendaX Installation & Administration Guide

V6.0

AgendaX Installation & Administration Guide © 2013 DROLLINGER TECHNOLOGIES LLC
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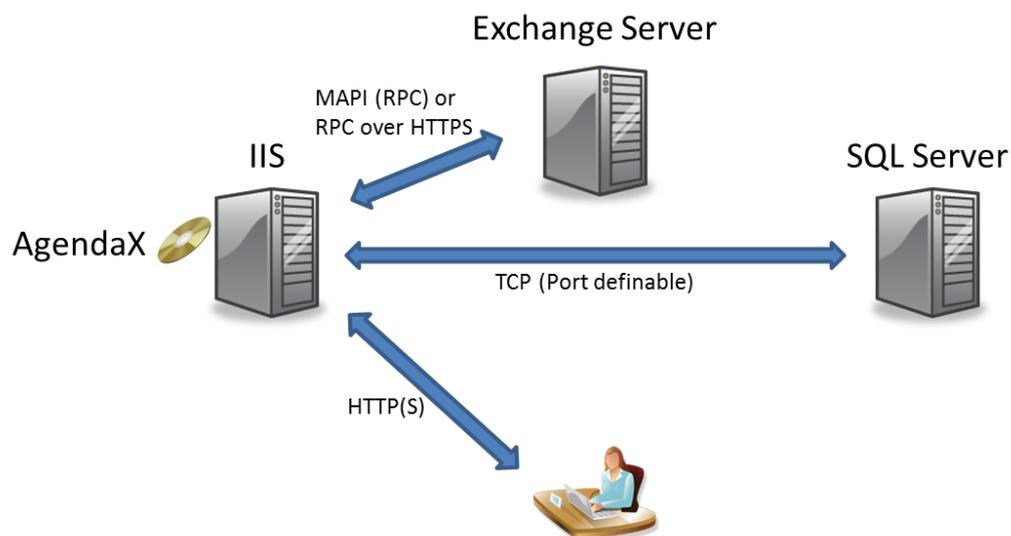
Chapter 1: Welcome to AgendaX

Welcome to AgendaX, the Organization- wide Agenda overview for Microsoft Exchange and Outlook from Drollinger Technologies LLC. AgendaX extracts Outlook calendar information stored on the Microsoft Exchange Server and makes it available on the company Intranet. Users can get an overview of all the appointments using their web browser. A server-based calendar agent regularly copies all Outlook appointments into a central database. Microsoft Internet Information Server publishes this information as a set of overviews on the company Intranet or Internet site.

1.1 How does AgendaX work?

A server-based Windows Service (the AgendaX Update Service) reads appointments of selected users in regular intervals from the Microsoft Exchange Server Message Stores and writes the information into a central database (any kind of ODBC compliant database, e.g., Microsoft Access, SQL Server, SQL Express, MySQL, Oracle etc.). The calendar information is published by Microsoft Internet Information Server on the corporate Intranet or Internet site using a set of Active Server Pages accessed by the browser.

1.2 Architecture and Protocols



The AgendaX Update Service reads Exchange Server calendars in definable intervals with MAPI and stores this information on SQL Server.

The AgendaX Web application queries the SQL Server database and sends HTML pages to the client.

Chapter 2: System Requirements

AgendaX is preferably installed on the Internet Information Server, but can also be installed on the Microsoft Exchange Server.

2.1 Server Requirements

- Microsoft Windows Server (2000, 2003, 2003 R2, 2008, 2008 R2, 2012) with IIS 6 or higher
- Microsoft Exchange Server (5.5, 2000, 2003, 2007, 2010, 2013)
- MAPI Environment (downloadable from Microsoft) or Microsoft Outlook 2007 SP2 or later

2.2 Client Requirements

- Microsoft Internet Explorer, Firefox, Netscape, or Google Chrome

2.3 Prerequisites

2.3.1 Installing the MAPI Environment

MAPI (Messaging Application Programming Interface) must be installed on the computer that will be running AgendaX and is needed to access Microsoft Exchange mailboxes. You can either install an **Outlook Client** (Outlook 2007 SP2 or later), which includes MAPI, or you can install the **MAPI environment separately**. The separate MAPI install is also called **Exchange Server MAPI**. Exchange Server MAPI does not include support for RPC over HTTP(s) connections to the Exchange Server.

2.3.1.1 *Setting up a MAPI Environment for Exchange 2013, Hosted Exchange, Exchange Online, or to access mailboxes in an untrusted domain*

If you want to access mailbox calendars on an **Exchange 2013 Server, Hosted Exchange Server, on Exchange Online (Office 365)**, or located in an **untrusted domain**, you have to install an Outlook client on the AgendaX Server.



Log on to the AgendaX Server with the AgendaX Service Account, create an Outlook Profile that accesses the AgendaX mailbox, **save the password** in the profile by enabling 'Remember my credentials' in the Windows Security dialog, and **note the name** of the Outlook profile.

*Please note: You will need the Outlook profile name during Setup. It is essential to log on with the AgendaX Service Account, as Outlook Profiles are saved **per user** and are not accessible from other user accounts.*

2.3.1.2 *Setting up a MAPI Environment to access local (pre 2013) Exchange Servers or servers in trusted domains*

If your mailboxes are hosted on local Exchange Servers in your domain, install Exchange Server MAPI.

There are two packages available to install a MAPI Environment. Depending on what type of computer you install AgendaX, you should select the appropriate package.

- **Microsoft Exchange Server MAPI Client and Collaboration Data Objects 1.2.1** from the following Microsoft site: <http://www.microsoft.com/downloads/details.aspx?familyid=E17E7F31-079A-43A9-BFF2-0A110307611E&displaylang=en>
- **Exchange 5.5 Administrator** (can be selected in the Exchange Server Setup). You will need your Exchange Server Setup CD to install this option.

In either case, if **Outlook** or a previous version of the above packages was installed before, you should first **uninstall** these, and then proceed with installing the most current version of either the MAPI client or Exchange 5.5 Administrator.

If you install AgendaX on a:

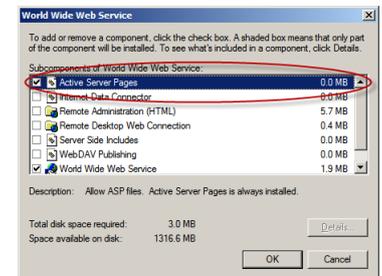
- **Dedicated Server** (without Microsoft Exchange installed on the same computer):
Download and install the ,Microsoft Exchange Server MAPI Client and Collaboration Data Objects 1.2.1'.
- **Exchange 5.5, 2000, 2003 Server**
Install the Exchange 5.5 Administrator from your Exchange Server 5.5/2000/2003 Setup program.
- **Exchange 2007, 2010 Server**
Download and install ,Microsoft Exchange Server MAPI Client and Collaboration Data Objects 1.2.1'

2.3.2 Preparing your server for ASP

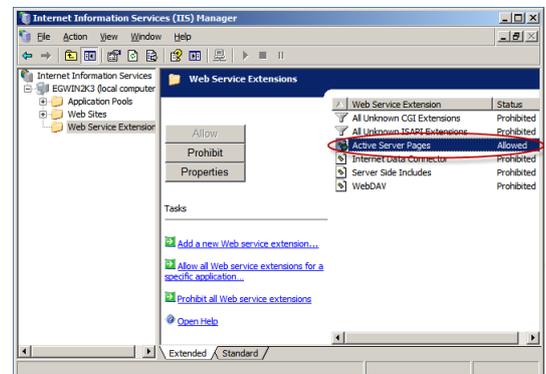
ASP (Active Server Pages) is used by Internet Information Server to display the web pages of the AgendaX web application. ASP is an optional component of every version of Internet Information Server. Please follow the instructions below depending on your operating system:

Windows 2000 / 2003:

In Control Panel / Add or Remove Programs / Add Remove Windows Components / Application Server / Details / Internet Information Services / Details / World Wide Web Service / Details / enable Active Server Pages



In Administrative Tools / Internet Information Services Manager / Web Service Extensions / Allow Active Server Pages



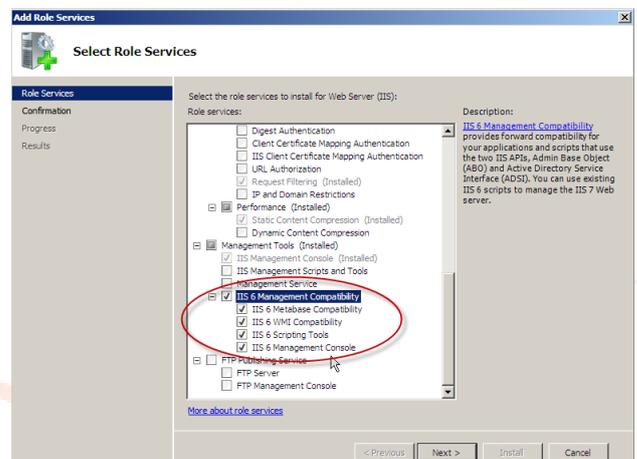
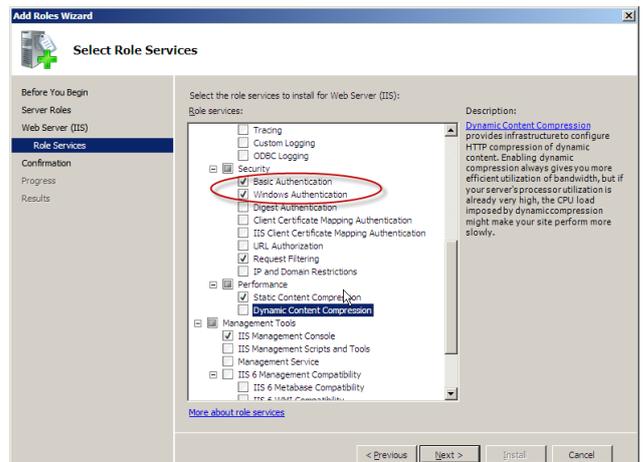
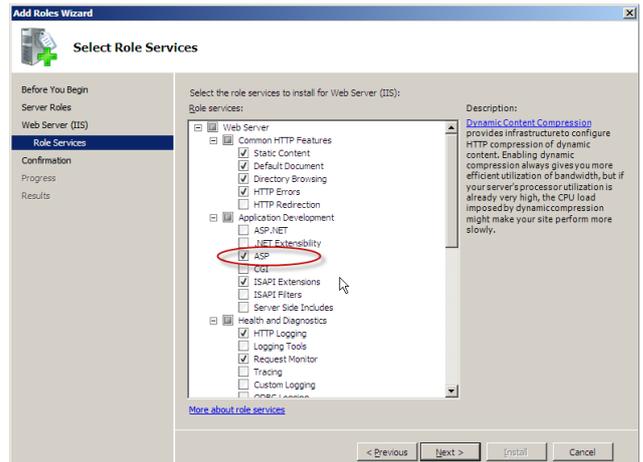
Windows 2008 (R2)

In Server Manager / Roles / Add Roles / Web Server add

- Application Development / ASP

- Security / Basic Authentication & Windows Authentication

- Management Tools / IIS6 Management Compatibility



2.3.3 Creating an AgendaX Service Account

The AgendaX Update Service needs to run in a special context to read calendar information from Exchange Server. For this reason, you need to create an AgendaX Service account with appropriate permissions.

Should you not be able to set permissions on your Exchange Server(s), you still have the option to let each participating AgendaX user set permissions on his / her mailbox (see next section).

If you have access to your Exchange Server(s), please follow the guidelines below to create an AgendaX Service account.

- Create a new Active Directory account and add it to the **Domain Users** group ONLY. Please note that this account should not be a member of any Administrator or Exchange groups.
- Give this account local Administrative privilege on the server where you will install AgendaX by adding it to the **local** Administrators group. It must have full access to the file system and registry.
- In case you will use the Meeting booking feature of AgendaX, this user also needs a **mailbox** on Exchange Server to send notifications of newly booked meetings to attendees.

2.3.4 Setting permissions for the AgendaX Service account

There are 2 options to set permissions for the AgendaX Service account:

- **Setting permissions on Exchange Mailbox Stores**
 - o **Exchange 2000 / 2003:**
Open the Exchange System Manager and set the following permissions for the AgendaX Service account on all Mailbox Stores that contain mailboxes (calendars) that you want to read and display with AgendaX:
 - Receive As
 - Administer information Store
 - o **Exchange 2007 / 2010 / 2013:**
Run one of the following cmdlets in your Exchange Management Shell for all Exchange Mailbox stores that contain mailboxes (calendars) that you want to read and display with AgendaX:

```
Get-MailboxDatabase "Servername\Storage Group\Mailbox Database" | Add-ADPermission -User "agendax_serviceaccount" -ExtendedRights "Receive-As", "Administer Information Store"
```

or

```
Add-ADPermission -Identity "Mailbox Database" -User "agendax_serviceaccount" -ExtendedRights "Receive-As"
```

and

```
Add-ADPermission -Identity "Mailbox Database" -User "agendax_serviceaccount" -ExtendedRights "Administer Information Store"
```

Please replace `Servername`, `Storage Group`, `Mailbox Database`, and `agendax_serviceaccount` with the values of your environment.

When installing on a **Small Business Server (SBS)**, you might need to run the following command first:

```
Add-PSSnapin Microsoft.Exchange.Management.PowerShell.E2010
```

- **Setting permissions on Mailbox level**

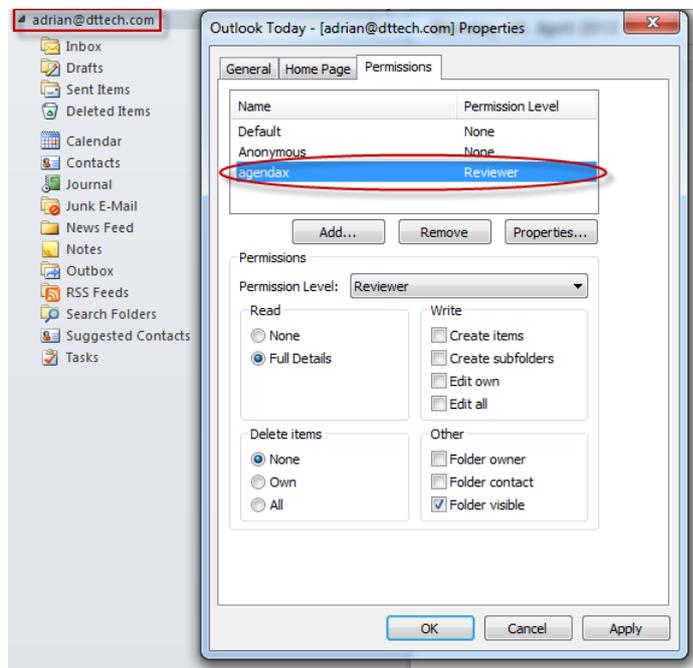
If you do not have access to the Exchange System Manager (Exchange 2000 / 2003) or the Exchange Management Shell (Exchange 2007 / 2010 / 2013) because of your company's policies or if your Exchange Server is hosted by an Exchange Hosting provider that refuses to setup an account with the above permissions, you can set the required permissions on mailbox level.

In this case, instruct each user that wants to participate in the AgendaX group calendar to grant the following permissions to the AgendaX Service account mailbox:

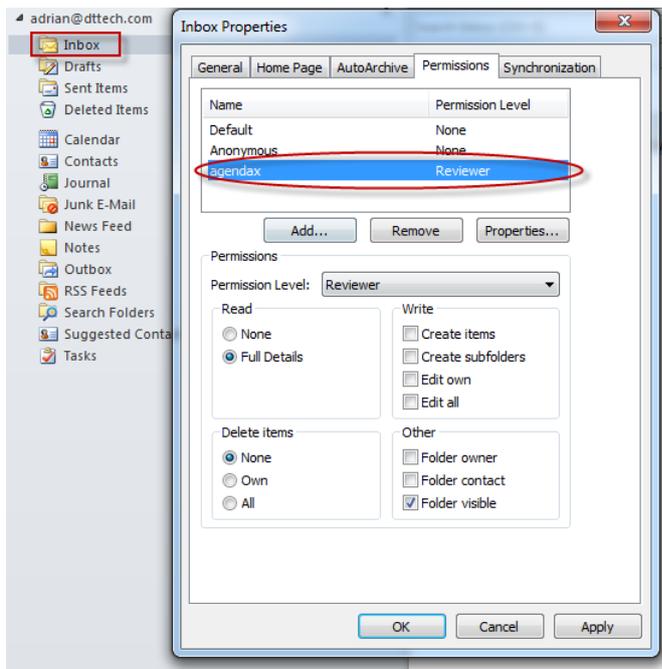


Reviewer permissions on the Mailbox (top mailbox level) and the Inbox folder

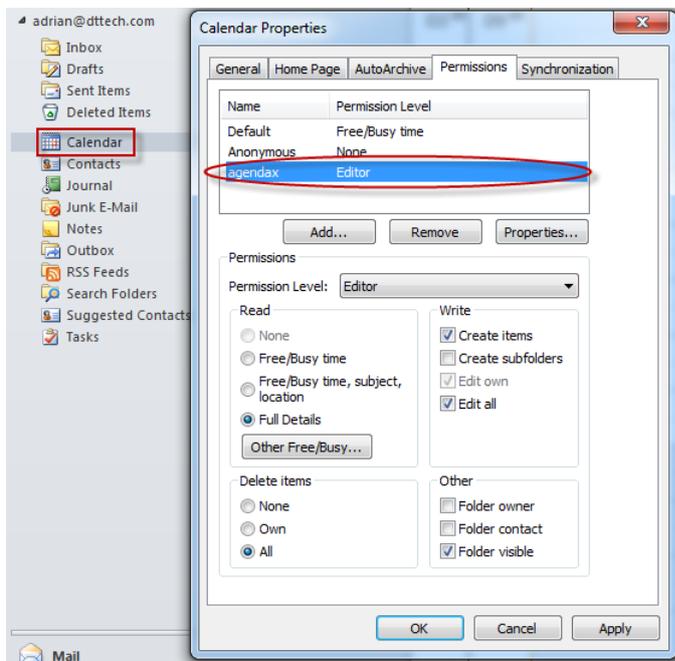
Editor permissions on the Calendar folder



Reviewer permissions on the mailbox level



Reviewer permissions on the Inbox folder



Editor permission on the Calendar folder

Chapter 3: Running the Setup program

Before running the Setup program, please make sure that you have followed the instructions in the System Requirements chapter. Particularly, make sure that you have

- Created an AgendaX Service account in Active Directory and set the required permissions
- Installed the MAPI environment
or
- Installed an Outlook client, logged on to the Server with the AgendaX Service Account and created an Outlook profile that accesses the AgendaX Service Account mailbox
- Installed the required Windows components

3.1 Starting Setup

Extract the downloaded ZIP file into a temporary folder on your Server and run Setup.exe to start the Setup Wizard.

Click **Yes** to proceed.



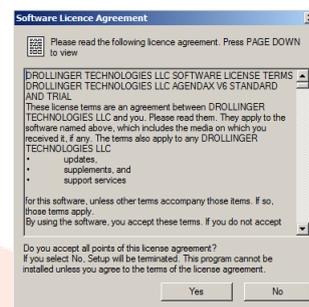
Press **Next** on the Welcome screen to display the AgendaX Software License Agreement.

*Please note: You can press **Help** at any time to display additional information about a Setup topic.*



Click **Yes** if you have read and agree with the Software License Agreement.

Please note: If you select ,No', the Setup Wizard will be terminated. This program cannot be installed unless you agree to the terms of the license agreement.



Enter your name and your company name. If you have purchased AgendaX, enter the License number in the field provided.

If you are evaluating AgendaX, leave the License number field as it is. Click ,Next' to continue.

Please note: The license number is tied to the Company name. If you have purchased AgendaX and received a license key, please be sure to enter the Company name exactly as stated on your license document.



Select the folder, where you would like to install AgendaX. Typically, this is a folder beneath your Inetpub directory.
 You can also enter a path that does not yet exist. The Setup Wizard will then create the folder for you.

Please make sure that all users that will use the AgendaX web application have at least **read and execute permissions** on this directory.

Site Administrators with access to the AgendaX web application settings (Administration page, see 4.1.5 Administration homepage access on page 20) also need **write** access.

If you use the **Export** functionality in the AgendaX web application (see 4.2.3 Feature Settings on page 32), you also need to grant **write** permissions for all users in the **TEMP folder** that Setup creates in the AgendaX installation folder.

Click **Next** to continue.

Select the code page that the AgendaX web application will be using. This setting will affect how times and dates will be displayed if you choose to not use browser language settings.
 You can later change this value by editing the GLOBAL.ASA file in the AgendaX installation folder.

Click **Next** to continue.

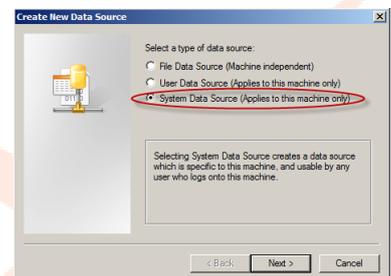
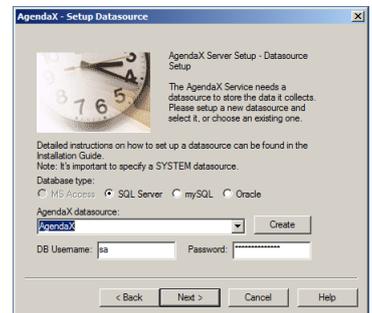
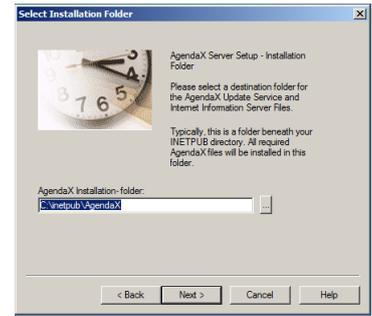
Now you need to create / select a data source that will be used by AgendaX. This is where AgendaX will store the data read from Exchange Server calendars. If you are installing AgendaX for the first time on this computer, you need to create a new data source. You may also select an existing data source from the drop down selector.

Please note: If you are installing AgendaX on a 64bit Operating System, the option "MS Access" will be grayed out, as Microsoft discontinued development of 64bit Jet Drivers. We recommend using SQL Server Express instead.

To create a data source, click **Create**.

Select **System Data Source** to create a data source that is visible to all users on this machine, as both the AgendaX Update Service and the AgendaX web application will access the database defined in this data source.

Click **Next** to continue.



3.1.1 Creating a data source for SQL / SQL Express

Select the **SQL Server** driver to set up a data source.

Please note: Do NOT use the SQL Server Native Client

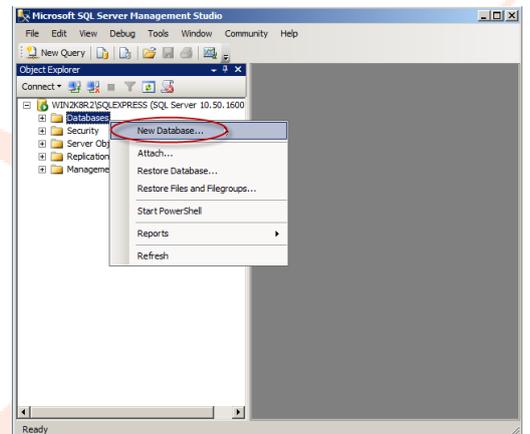
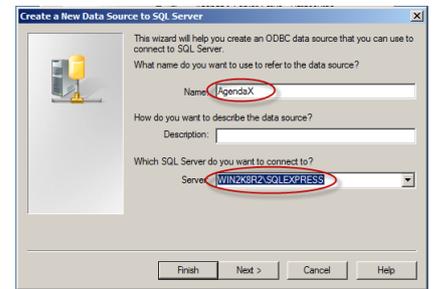
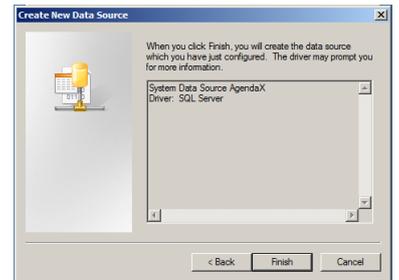
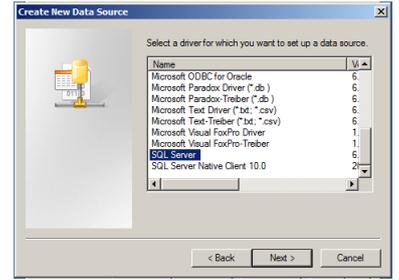
Click **Next** to continue.

Click **Finish** to continue with the data source definition.

Enter a **name** for your new data source and specify the **SQL Server** or **SQL Express Instance** that stores the AgendaX database.

Run **SQL Server Management Studio** to create an empty database.

Right-click on Databases, and select **New Database**.



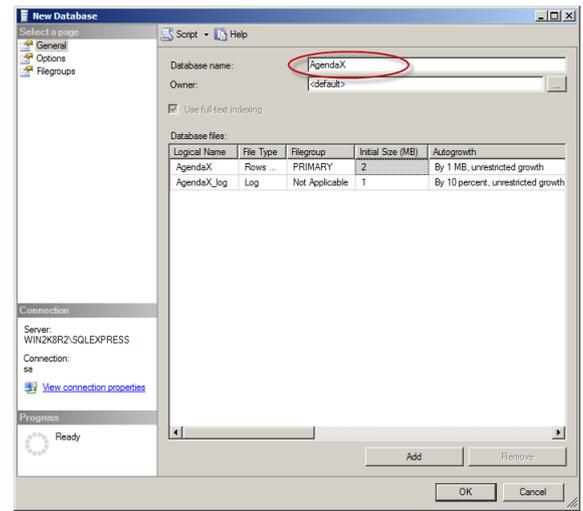
Enter a **Database name** for the new database.

*Please note: If you use a special SQL user for this database (not **sa**), you have to create a **Login** under Security / Logins and give this user db_owner rights on the database you just created. This can be found under "User Mapping".*

Notes regarding Windows Authentication: You can also use Windows Authentication with AgendaX, without creating a special SQL user or using the built-in sa account. However, when you use Windows Authentication, you will have to give permissions on the database to every AgendaX user, which is usually more complicated to do.

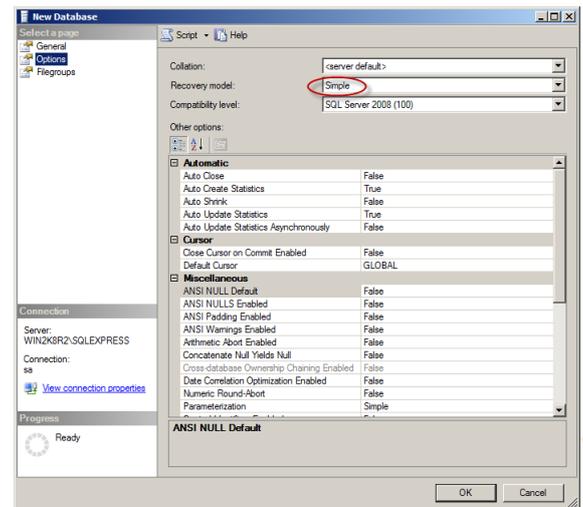
Also, starting with Windows 2008, when using Windows authentication, the SQL (Express) server must be installed on the same server as the Internet Information Server used for AgendaX. This is because of enhanced security standards that prevent a so-called 'double hop authentication' in Windows.

We therefore **recommend using SQL authentication** with a dedicated SQL user.



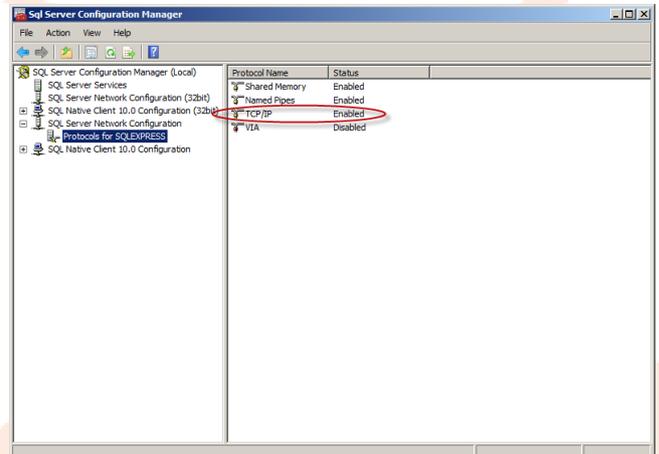
Click on **Options** and select the **Simple** recovery model. This will ensure that the database log will not grow unnecessarily.

All other options can be left to their default values.

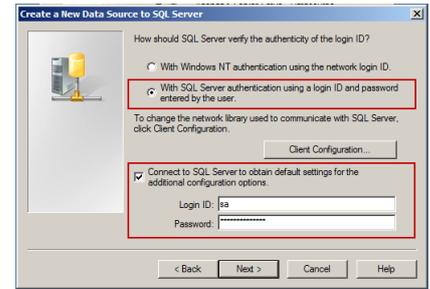


In **SQL Server Configuration Manager**, enable the **TCP/IP** protocol if you are using a SQL Server Express database.

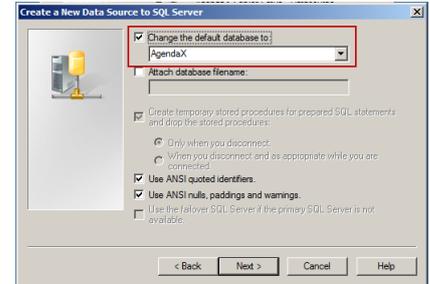
If you are using a non-standard SQL driver in the data source definition, also enable **TCP/IP** on the appropriate configuration option.



Back in the data source definition, select **SQL authentication** (or Windows NT authentication if you decide to access the database with Windows authentication), and enter the **credentials** to access the database.

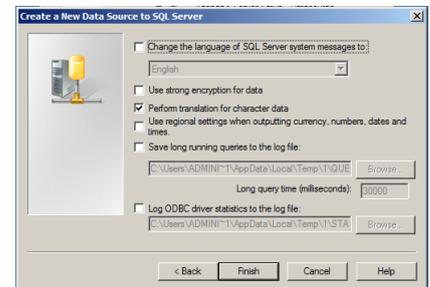


Choose **Change the default database to** and select the database you just created, leave all other settings to their default values.



Click **Next** to continue.

Leave all settings to their default values.



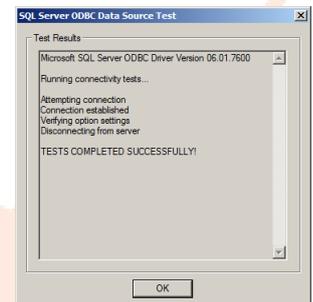
Click **Finish** to continue.

This screen shows an overview of the new datasource definition. Click on **Test Data Source** to check that it is working.



You should see **TESTS COMPLETED SUCCESSFULLY**.

Click on OK to close the window.



3.1.2 Creating a data source for MS Access

Select **Microsoft Access Driver (*.mdb)** to create a data source that accesses a Microsoft Access database.

Click **Next** to continue.

Click **Finish** to create the data source.

Please enter a **name** for your new data source, then click on **Create** to specify where the new database should be created.

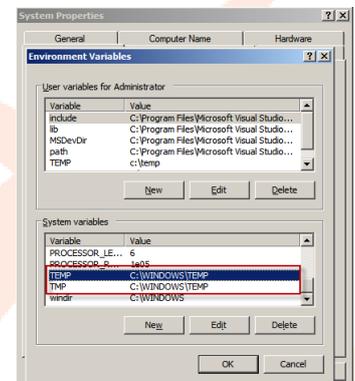
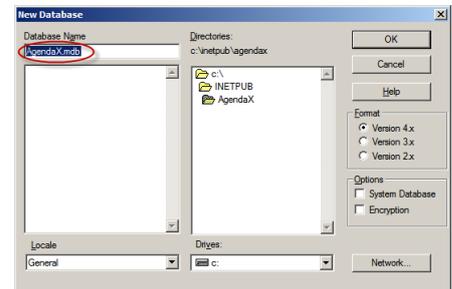
Navigate to the installation folder of AgendaX and enter a **name** for the database to be created.

Please note: You can create the database wherever you like, but it needs to be on a local drive, as the Microsoft Access driver does not allow the use of UNC names.

Please make sure that all users accessing AgendaX have **read/write** access to the database file and **read/write/create/delete** rights in the directory where the database is stored.

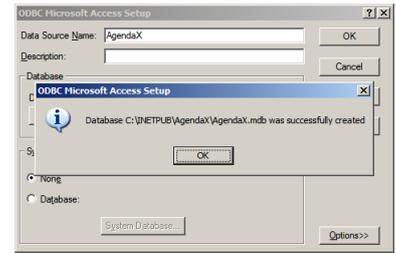
Click **OK** to continue.

Since the Microsoft Access driver stores temporary files in the directories specified by the TEMP and TMP system environment variables, you also have to grant **read, write, create and delete** permissions to these folders. You can locate these folders by navigating to My Computer / Properties / Advanced / Environment variables / System variables / TEMP and TMP (defaults to WINDOWS\TEMP).



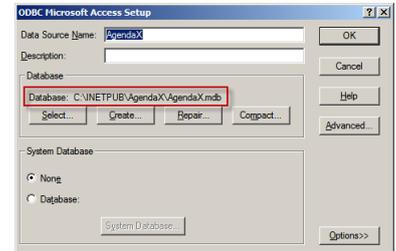
The database was successfully created.

Click **OK** to continue.



This shows the Microsoft Access data source setup screen again. Note that the **name** of the database file you just created is now displayed.

Click **OK** to leave the Microsoft Access data source configuration screen.



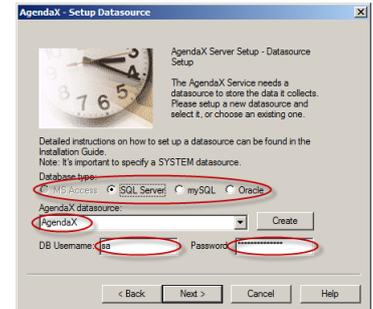
3.2 Continuing Setup after the data source definition

Back in the Data source setup screen, select the **type** of database and the **data source** that you just created.

For databases other than MS Access databases, also enter the **username** and **password** that should be used to access the database.

Please note: if you use NT authentication with a SQL or SQL Express database, do not enter login information here.

Click **Next** to continue



Select the version of your Microsoft Exchange Server. If you are running multiple versions of Exchange Server in your company, select the highest version in use. Please note that the AgendaX Service account mailbox must be hosted on the highest version of Exchange Server in use.

- If you have installed an **Outlook Client** on the AgendaX Server as described in 2.3.1.1 Setting up a MAPI Environment for Exchange 2013, Hosted Exchange, Exchange Online, or to access mailboxes in an untrusted domain on page 5, check the **“Exchange is hosted by a hosting provider in an untrusted domain”** checkbox and specify the **Outlook profile name**.
- If you have installed **“Microsoft Exchange Server MAPI Client and Collaboration Data Objects 1.2.1”** as described in 2.3.1.2 Setting up a MAPI Environment to access local (pre 2013) Exchange Servers or servers in trusted domains on page 5, leave the Outlook Profile name field empty.

Click **Next** to continue



Enter the AgendaX Service Account you created earlier (DOMAIN\Username) and its password.

Click **Next** to continue



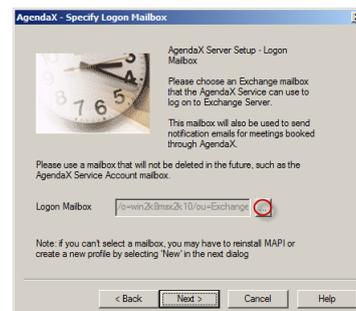
Select the **Mailbox** that AgendaX uses to logon to the Exchange Address book and to send out notifications for meetings booked through the AgendaX Web interface.

Usually, the mailbox of the AgendaX Service account is used for these tasks. However, this mailbox does not need any special permission on Exchange Server and any mailbox may be used.

Please note: When you click on the ... buttons and nothing happens or an error message is displayed, it may be that the MAPI subsystem on this server does not work correctly and needs to be reinstalled.

*If you see a wrong, empty, or offline address book when you select a mailbox, the profile that is used points to a wrong or inexistent directory server. In this case, select **New** in the Choose Profile dialog and create a new profile.*

Click **Next** to continue



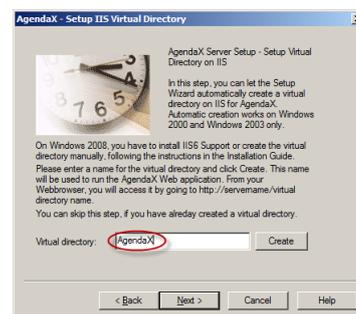
This step creates a virtual directory on the Default Website of this IIS server with the required settings for the AgendaX Web application.

Enter the **name** of the virtual directory (e.g. AgendaX).

The web application will then be accessible with the URL

http://servername/virtual_directory_name

If you want to create the virtual directory manually or on a different website you may skip this step. For instructions on how to configure a virtual directory manually, please refer to Chapter 5: Manually setting up a virtual directory on IIS on page 47.



Please note: On Windows 2008 you have to install IIS6 Management Compatibility for the automatic creation of the virtual directory as explained in "2.3.2 Preparing your server for ASP" on page 6.

If you get an error message while creating the virtual directory, either a virtual directory with the specified name already exists or IIS6 Management Compatibility may have not been installed.

Click **Create** to create the virtual directory.

Click **Next** to continue

This completes the steps of the AgendaX Setup.

Click **Finish** to install AgendaX.

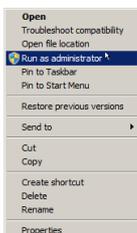


Chapter 4: Configuring AgendaX

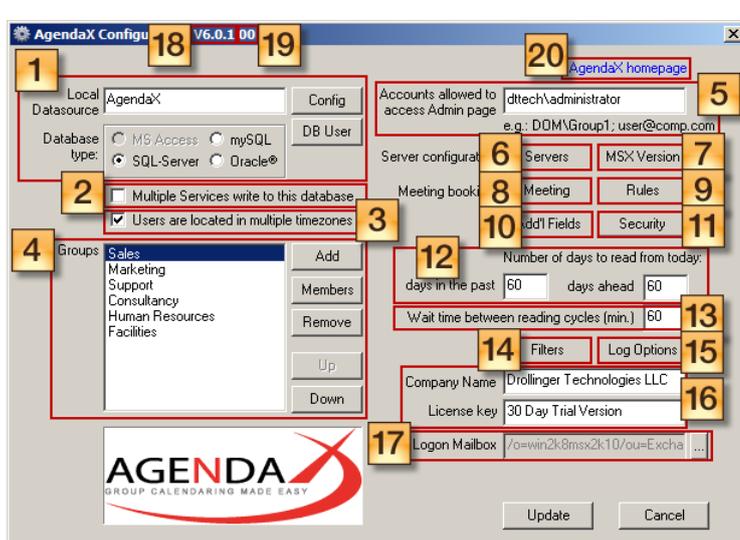
4.1 Configuring the AgendaX Update Service



The configuration of the AgendaX Update Service is accessed by running AgendaXCfg.exe in your AgendaX Installation directory, or by double-clicking the Link conveniently located on your Desktop.



On Windows 2008, please run the AgendaX Configuration Utility by right-clicking AgendaXCfg.exe (or the Link on your Desktop) and choosing 'Run as administrator'.



- | | | | |
|----|--------------------------------------|----|-------------------------|
| 1 | Data source definition | 11 | Security settings |
| 2 | Multiple Services definition | 12 | Interval definition |
| 3 | Multiple time zones definition | 13 | Update cycle definition |
| 4 | Groups definition | 14 | Filter options |
| 5 | Administration homepage access | 15 | Logging options |
| 6 | Multiple Exchange Servers definition | 16 | License |
| 7 | MS Exchange Server version | 17 | Logon Mailbox |
| 8 | Meeting booking definition | 18 | Version |
| 9 | Rules definition | 19 | Patch level |
| 10 | Custom fields definition | 20 | Links |

4.1.1 Data source definition

The **Config** and **DB User** buttons let you define a new data source, in case you want to change the one you defined during Setup. Please make sure that you always create a System data source (as opposed to a File or User data source).

Follow the steps described in "3.1.1 Creating a data source for SQL / SQL Express" on page 13 or "3.1.2 Creating a data source for MS Access" on page 16.

Be sure to specify the correct database type that corresponds to your data source, and specify a database username and password for databases other than MS Access.

If you use a SQL database with Windows Authentication, do not specify a database username and password. The credentials of the user using the AgendaX application will be used instead. In this case, you have to add permissions on the SQL database for each user that will be using the AgendaX database. For this reason, it is much simpler to use SQL authentication.

*Please note: When you make changes to the data source, the database user / password, or the database type, make sure to apply these changes also in the **Servers** definition.*

4.1.2 Multiple Services definition

It is possible to install AgendaX on different servers, in different Active Directory forests, locations, Exchange Organizations, or even different companies, and write with all installations to the same database, to get a consolidated view of otherwise unconnected mailbox calendars. For more information about connecting different AgendaX sites, see Chapter 6: Connecting different AgendaX Sites on page 56.

If more than one AgendaX Update Service is writing to the same database, you have to check the **Multiple Services write to this database** checkbox. In this case, you have to delete all pre-existing database tables in the AgendaX database, as the structure of these tables will change the next time the AgendaX Update Service is started.

4.1.3 Multiple Time zones definition

If users are located in different time zones or if you have travelling users, you can enable the **'Users are located in multiple time zones'** feature.

The AgendaX Update Service will then read meeting times in UTC, while the web application will convert these times to the users local time zone. Each user can set his local (or current) time zone in the AgendaX web application in **'Personal settings'**.

If you don't enable this feature, meeting times are read by the AgendaX Update Service in the servers local time zone and all users of the AgendaX web application will see meeting times in the servers time zone.

4.1.4 Groups definition

You can configure an unlimited number of individual groups that consist of Exchange distribution lists and individual users. The members of these groups are the users whose calendars will be displayed by the AgendaX web application. Users that are not part of any group will not be scanned and therefore will not be available in the AgendaX views. The groups you define here are **Administrator defined groups** and will be available to all AgendaX users. If you do not want to make all Administrator defined groups available to all users, you can enable the Group membership required to view group feature (see 4.2.3 Feature Settings in on page 32) to only display groups that the current AgendaX user is a member of.

You can also setup different installations of AgendaX to separate groups of users, if they are not allowed to see each other's data. Separate installations can be secured with NTFS or virtual directory permissions.

Each AgendaX user also has the possibility to define up to 9 personal groups that are only available to him / her. Personal groups are defined in the AgendaX web interface.

Click  to add a group.

Click  or double-click a group to show or to modify the members of a group.

Click  to remove a group.

Click  after selecting a group to move it up in the list

Click  after selecting a group to move it down in the list

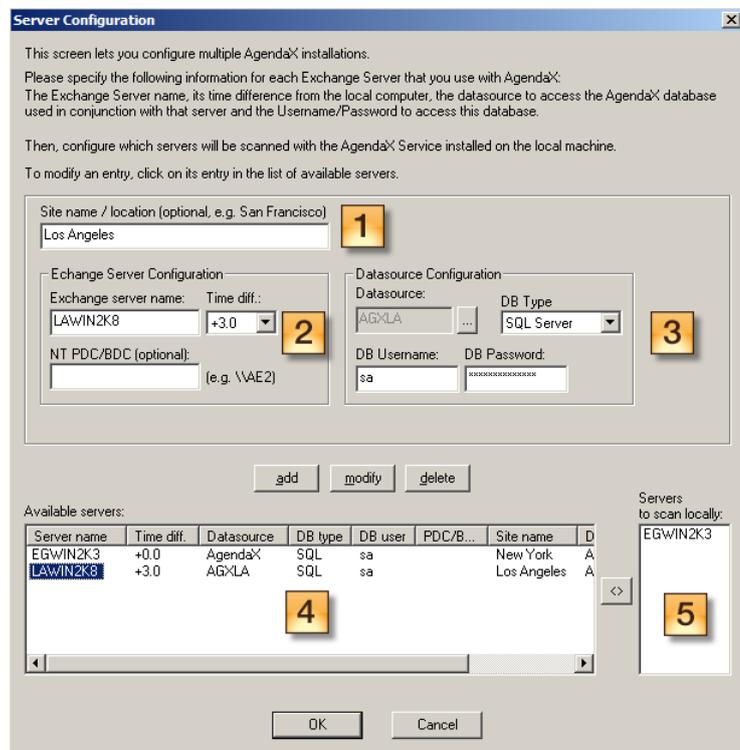
4.1.5 Administration homepage access

Specify the Windows accounts that are permitted to make changes to the AgendaX Web application configuration. Only the Windows accounts listed here will have access to the Administration homepage of AgendaX. This feature requires the use of 'Integrated Windows authentication' ('Windows authentication' on Windows 2008) or 'Basic authentication' (see 4.4.1 Automatic login on page 45 for additional information).

4.1.6 Multiple Exchange Servers definition

Click  to configure your Microsoft Exchange servers, including associated datasources and time differences, if you have multiple sites / servers in your organization or if AgendaX is running on multiple servers.

This will allow you to link different AgendaX Setups, split the users to be scanned to different AgendaX Update Services, and to specify time zone differences between Exchange Servers. Clicking the **Servers** button will open the 'Multiple server / site configuration' dialog. For more information, please refer to Chapter 6: Connecting different AgendaX Sites on page 56.



- 1 Optionally enter a Site name
- 2 Enter the Exchange Server name, its time difference from the local (AgendaX) server, and optionally the NETBIOS name of a Primary or Backup Domain controller that should handle Windows account information requests.
- 3 Define a **datasource** that will store the data read for this Exchange Server. This can be the same datasource for all Exchange Servers or different datasources for different Exchange Servers. If you specify different datasources, each datasource will only contain the data read from the associated Exchange Server. Select also the **database type**, **database username** and **password**. For more information about setting up a datasource, please see 3.1.1 Creating a data source for SQL / SQL Express on page 13 or 3.1.2 Creating a data source for MS Access on page 16.

- 4 List of Exchange servers that you have defined. Select one of the entries to propagate its contents to the fields above.
- 5 Servers to scan locally: Only servers added to this list will be scanned by the (local) AgendaX Update Service. If you have multiple AgendaX Setups in different locations, you can define to e.g. only scan local Exchange Servers to reduce inter-site bandwidth usage.

4.1.7 Exchange Server Version

The Exchange Server Version dialog defines which version of the MAPI client (Messaging Application Programming Interface) is installed on the AgendaX server, and which Exchange Server version is used in your company.



- 1 Use the **Exchange Server MAPI Client** (MAPI/CDO download from Microsoft) if your Exchange Server is hosted on your site or in a trusted domain, and your Outlook clients use RPC (Remote Procedure Calls) to access Microsoft Exchange.

Please also specify the Exchange Server version. If you have multiple Exchange Servers running different versions, you have to move the AgendaX Service account mailbox to a server running the highest Exchange Server version used in your company and specify this version in the Exchange Server Version dialog.



2 Use the **Outlook MAPI Client** (Outlook 2007 SP2 or higher installed on the AgendaX Server) if you use Exchange 2013, your Exchange Server is hosted in an untrusted domain, by an Exchange Hosting Provider, you use Office 365 (Exchange Online) and / or your Outlook clients use RPC over HTTP(S) to connect to the Exchange Server.

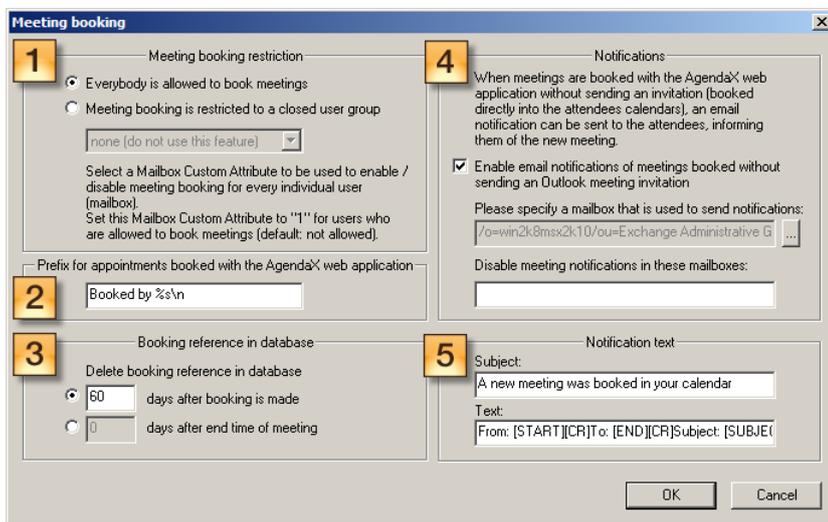


If you use the Outlook MAPI Client, logon to the AgendaX Server with the AgendaX Service Account, create an Outlook Profile that accesses the AgendaX mailbox, save the password in the profile by enabling 'Remember my credentials' in the Windows Security dialog, and note the name of the Outlook profile.

Enter the name of the Outlook profile created in the '**Outlook Profile Name**' field.

4.1.8 Meeting booking definition

Clicking on the **Meeting** button opens the Meeting booking definition dialog:



- 1** Meeting booking restriction
- 2** Prefix for appointments booked through AgendaX
- 3** Booking reference in database
- 4** Notifications
- 5** Notification text

4.1.8.1 Meeting booking restriction

You can either allow everybody to book meetings in the AgendaX web application or restrict this feature to a closed user group. If you restrict meeting booking, only users whose Custom Mailbox Attribute is set to "1" are allowed to book meetings in the AgendaX Web application. You can select which Custom Mailbox Attribute should be used.

4.1.8.2 Prefix for appointments booked through AgendaX

When meetings are booked through the AgendaX Web application, the meeting text is prefixed by a statement indicating who booked the meeting. This is useful to track back who booked a meeting in case of disagreements. The following characters have special meanings:

- %s Domain and username of the person booking a meeting
- \n Newline character
- \r Carriage- return character
- \t Horizontal tab character

4.1.8.3 Booking reference in database

When a meeting is booked in the AgendaX web interface, a booking reference is stored in the AgendaX database. This is especially important for meetings that are booked without sending meeting invitations. Since such meetings are booked individually into each attendee's calendar, they are not connected to each other. Without the booking reference, AgendaX wouldn't be aware of the relationship between those meetings.

From time to time, these booking references must be deleted, to prevent the database from growing endlessly. You can specify, depending on your company's compartment of meeting booking, after how many days a booking reference should be deleted.

Choose to delete a booking reference either after a number of days following the booking of the meeting or a number of days after the end time of the meeting.

4.1.8.4 Notifications

When you book meetings in the AgendaX web interface, you have 2 options of inviting attendees: either by sending them a standard Outlook invitation or by booking the meeting directly into their calendar, without giving them the option to accept or decline the meeting. This is useful to add rooms or equipment mailboxes that don't handle meeting invitations automatically, or if you have personnel booking meetings for other staff (e.g. for off-site technicians), that shouldn't have the option to accept or decline a booking.

It is useful to inform the attendees of such meetings that they have received a new booking in their calendar. This can be done with an email message.

Select if you want to notify attendees with an email message when someone books a meeting for them without sending a meeting invitation.

If in general you want to send notifications but not to some mailboxes (e.g. equipment mailboxes whose Inbox is never read), you can specify which mailboxes should not receive notifications. Enter the display names as they appear in AgendaX, separated by semicolons.

4.1.8.5 Notification text

The subject and message text of notifications described in 4.1.8.4 Notifications can be modified to suit your needs. Placeholders surrounded by [] will be replaced by the actual meeting data at the time the meeting is booked and the notification is sent. You can use all placeholders for both Subject and Meeting Text. The following placeholders can be used:

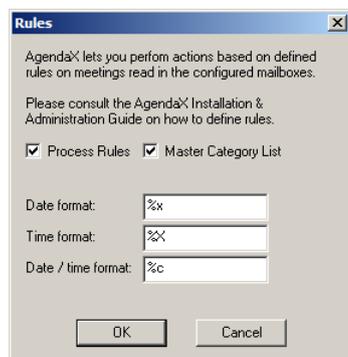
[START]	Start time of the meeting
[END]	End time of the meeting
[SUBJECT]	Subject of the meeting
[CATEGORY]	Category of the meeting
[BOOKED BY]	Domain and username of the person that booked the meeting
[CR]	Carriage Return (new line)

Example: From: [START][CR]To: [END][CR]Subject: [SUBJECT][CR]Category: [CATEGORY][CR]Booked by: [BOOKED BY]

4.1.9 Rules definition

AgendaX lets you define Rules to apply custom Actions on appointments. As an example, you might want to automatically categorize meetings with a specific category depending on words found in the subject line of appointments. These Rules change appointments directly on Exchange Server, so use extreme caution when you define rules, as they might change all or a large number of appointments in people's calendars when incorrectly defined.

For a detailed description on how Rules are defined, please see Chapter 7: Rules on page 60.



Process Rules:	Turns processing rules on or off
Master Category List:	Enables management of a master category list in rules
Date format:	Date format used for replacement parameters FromDate, ToDate in Actions (e.g. 5/12/2013)
Time format:	Time format used for replacement parameters FromTime, ToTime in Actions (e.g. 3:44PM)
Date / time format:	Date / time format used for replacement parameters FromDateTime, ToDateTime in Actions (e.g. 5/12/2013 3:44PM)

Possible values for Date, Time, and Date / Time format:

%a	Abbreviated weekday name
%A	Full weekday name
%b	Abbreviated month name
%B	Full month name
%c	Date and time representation appropriate for locale
%d	Day of month as decimal number (01 - 31)
%H	Hour in 24-hour format (00 - 23)
%I	Hour in 12-hour format (01 - 12)
%m	Month as decimal number (01 - 12)
%M	Minute as decimal number (00 - 59)
%p	Current locale's A.M./P.M. indicator for 12-hour clock
%S	Second as decimal number (00 - 59)
%x	Date representation for current locale
%X	Time representation for current locale
%y	Year without century, as decimal number (00 - 99)
%Y	Year with century, as decimal number

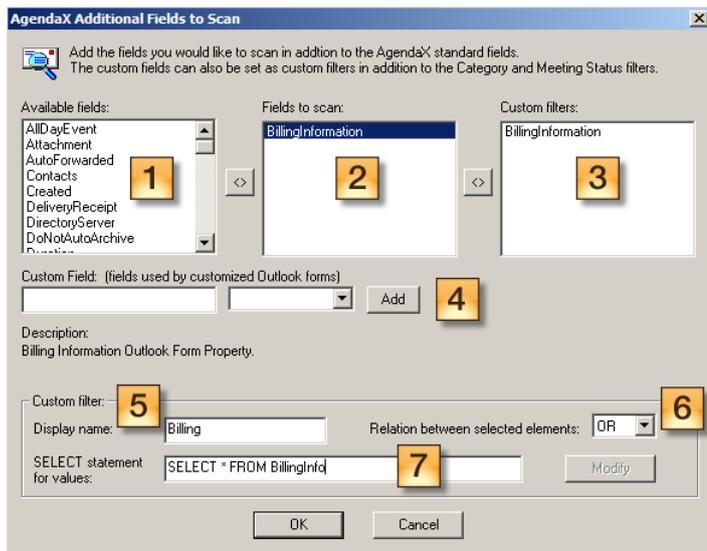
Please note: current locale is the locale of the server that runs the AgendaX Update Service.

4.1.10 Custom fields definition

You can specify additional fields to be added to the AgendaX database. These fields can be standard Outlook Appointment fields or fields added by customizing the standard Outlook Appointment form. The fields you select will be added to the database and displayed by the AgendaX Web application.

Please note that SQL- server database tables are only created the first time the AgendaX Service is started. Since the tables are PURGED as opposed to DROPPED, when a new cycle starts, and the table definition changes when you add or remove fields, you need to manually DROP the AgendaXTable1 and AgendaXTable2 tables in your database when you make changes to the fields scanned by the AgendaX Service.

With Microsoft Access databases, tables are recreated at the start of every cycle, so you don't need to drop any tables in your database.

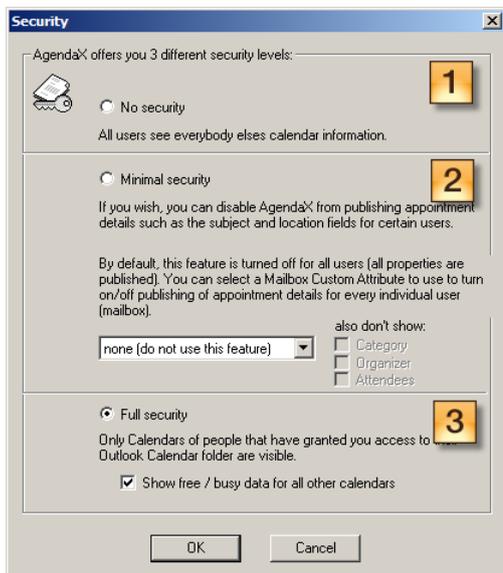


- 1 List of available fields. This list contains the standard Outlook fields as well as Custom Fields that you can define (see 4).
- 2 List of fields that will be scanned by the AgendaX Update Service. Use the <> button to add fields to this list.
- 3 If you want to filter views in the AgendaX Web application not only by Categories, Meeting Status, and Text, you can specify a Standard Outlook field or a Custom field as a Custom filter. Use the <> button to add fields to this list.
- 4 If you are working with a modified appointment form in Outlook, you can specify an unlimited number of User- defined fields from your form and have the AgendaX Update Service write their values to the database. These values will also be displayed by the AgendaX Web application, and you can define Custom filters to filter views by these Custom fields. Click **Add** to add a new Custom Field to the list of available fields.

- 5 If you define a custom filter (see 3 above), you need to add a table to the AgendaX database that contains all the possible values for this filter (e.g. a table with all possible country names). Define a display name used in the AgendaX web application for this custom filter.
- 6 Specify what AgendaX should display when multiple values are selected in the custom filter. This setting is only meaningful for fields that can contain multiple values.
- 7 Specify a tSQL Statement that will return all possible values for a custom filter from your database table.

4.1.11 Security settings

AgendaX offers you three different Security levels:



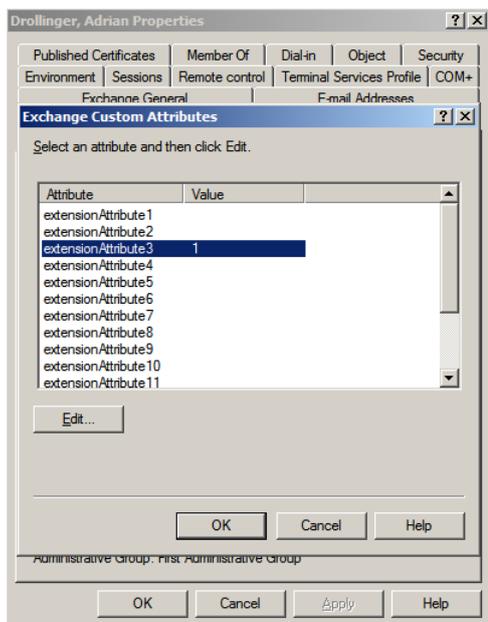
- 1 **No security** (everybody can see all participating calendars)
- 2 **Minimal security** (details such as the subject and location of meetings are not published for specified users, for example top management or HR personnel).

Minimal security can be turned on by selecting a 'Mailbox Custom Attribute'. Open Active Directory Users and Computers / Exchange Advanced / Custom Attributes to see which custom attributes are available.

If you wish to disable AgendaX from publishing appointment details such as the subject and location fields for certain users, you need to set the custom mailbox attribute of these users to 1. The custom attribute of the other users can be left empty and is by default set to 0, meaning all details are published.

For added security, you can also prevent the AgendaX Update Service from writing the **Category**, **Organizer**, and **Attendees** values of meetings of these users to the database.

If you would like to turn on **Minimal Security for all or most users**, you can set a flag in AgentX.ini to reverse the security logic:



[Config]
ReverseSecurityLogic= 1

When this flag is set, all users whose specified custom mailbox attribute is NOT set will only publish free / busy information (no appointment details such as subject and location). In this case, you will not have to set any custom mailbox attributes and instead just specify an attribute that is not set to any value.

- 3 Full security** (users will only see Calendars of users that have granted them access rights to their Outlook calendar folder. This feature requires the use of 'Integrated Windows authentication' ('Windows authentication' on Windows 2008) in IIS, or 'Basic authentication').

You can also enable to **show free / busy data** (without meeting details) for all users that didn't explicitly give you permission to their Calendar folder in Outlook.

Note for Full Security with hosted Exchange Servers:

If your Exchange Server is hosted in an **untrusted domain**, by an Exchange Hosting Provider, or you use **Office 365 (Exchange Online)**, AgendaX cannot map mailboxes on the foreign domain to local domain accounts. Since AgendaX needs this mapping with the **Full Security** option to determine which user has access to which mailboxes, you need to create associations between mailboxes and local user accounts. These associations can be made in the **AGXLinkedUsers** database table. This table consists of 2 columns, **AGXMailboxName** and **AGXLocalAccount**. Add a row for each user and specify its local user account as follows:

AGXMailboxName	Primary SMTP- Address of the mailbox
AGXLocalAccount	DOMAIN\username of the user in the local domain

4.1.12 Interval definition

You can define the interval of time that AgendaX reads from the calendars. The interval is calculated each time the AgendaX Update service runs and therefore changes daily.

Days in the past specifies for how many days in the past AgendaX should display meetings. Appointments that start before the specified number of days will not be shown in the overviews.

Days ahead specifies for how many days into the future AgendaX should displays meetings. Appointments that start after the specified number of days will not be shown in the overviews.

Please note: the Interval definition influences the size of your AgendaX database.

4.1.13 Update Cycle definition

The **Wait time between reading cycles** value defines the number of minutes the AgendaX Update Service waits until it starts reading calendars again. Newly read data is always published to the web application at the end of a reading cycle. If you want frequent updates, decrease this value; if you want to limit server load, increase this value.

4.1.14 Filter options

AgendaX has some filter options that let the Administrator filter out meetings that match a certain criteria:

The screenshot shows the 'Meeting Filters' dialog box with the following options and callouts:

- 1** Suppress public holidays and meetings categorized as 'Holiday'
- 2** Suppress meetings marked as 'Private'
- 3** Suppress Cancelled Meetings
- 4** Suppress meetings with 0 min. duration (e.g. from 8:00 to 8:00)
- 5** Suppress meetings categorized with these categories: HR Interview;Board of Directors Meeting;
- 6** Suppress meetings that are not categorized
- 7** In mailboxes: John Foster;Paul Stanton read only meetings: categorized with these categories: Business;Internal (separate by semicolons) and status: no check of status
- 8** Show meetings with sensitivity 'Personal'

Buttons: OK, Cancel

- 1** Suppress public holidays
- 2** Suppress Private meetings
- 3** Suppress Cancelled meetings
- 4** Suppress meetings with 0 minute duration
- 5** Suppress certain categories
- 6** Suppress non-categorized meetings
- 7** Show only specified categories in defined mailboxes
- 8** Show Personal meetings

4.1.14.1 Suppress public holidays

Microsoft Outlook has a feature to import public holidays into people's calendars. These public holidays, as well as all appointments categorized with the 'Holiday' category, are by default filtered by AgendaX and are therefore not shown in the overviews. If you wish to display such appointments, you can turn this feature off.

4.1.14.2 Suppress Private meetings

AgendaX never publishes details of private appointments. If you want to completely omit private appointments from the AgendaX overviews, you can turn this feature on.

4.1.14.3 Suppress Cancelled meetings

Depending on user settings in Outlook, cancelled meetings are not always removed from people's calendars. If you wish to omit cancelled meetings from AgendaX, you can turn this feature on.

4.1.14.4 Suppress meetings with 0 minute duration

Some users book 0 duration meetings as reminders (e.g. 9:00AM-9AM Check Sales statistics) to remind them of tasks they need to do. If you prefer to hide meetings with no duration in AgendaX, you can enable this filter.

4.1.14.5 Suppress certain categories

In some companies, employees are used to book reminders for certain tasks into their calendar (see also 4.1.14.4 Suppress meetings with 0 minute duration) or they book meetings that other people shouldn't see. For example, an HR employee schedules Job interviews. You can define categories that AgendaX should not publish and instruct users to categorize sensitive meetings with these categories. Separate categories with semicolons.

4.1.14.6 Suppress non-categorized meetings

If you have a company policy that all company relevant meetings must be categorized, you can instruct AgendaX to skip non-categorized meetings. AgendaX will then only show meetings with at least one category set.

4.1.14.7 Show only specified categories in defined mailboxes

If you have employees (e.g. HR, directors) that in general have sensitive calendar data, but still would like to share some of their calendar with others, you can do so by defining that in certain mailboxes, only meetings categorized with specific categories are displayed. All other meetings will be hidden from AgendaX. You can define in which mailboxes this filter should be active and which categories should be displayed. You can further limit the selection by meeting status (free, tentative, busy, out of office), e.g. only meetings categorized with the 'Business' category and status 'Busy' should be shown. Separate mailbox names and categories with semicolons.

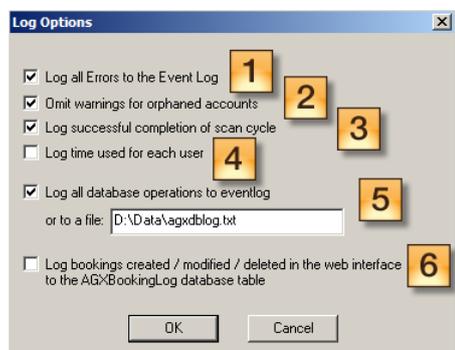
4.1.14.8 Show Personal meetings

By default, AgendaX does not publish meetings with sensitivity set to 'Personal', 'Private', or 'Confidential'. Meeting sensitivity can be set in Outlook by selecting a meeting and pressing Alt-Enter. Please note that meeting sensitivity has nothing to do with marking a meeting as Private.

If you wish to show meetings with sensitivity 'Personal' in the AgendaX overviews, you can enable this feature.

4.1.15 Logging options

The AgendaX configuration gives you several options for writing Events to the Application Event Log. Normally, you don't have to change any of these options. If you want to trace down problems or omit certain warnings, you can set the following settings:



1 Log all Errors to the Event Log: (default) We recommend to keep this option turned on, as the AgendaX Update Service will otherwise not log any errors it encounters to the Application Event Log.

2 Omit warnings for orphaned accounts: AgendaX reads permissions in the calendars it scans. If it cannot attribute a permission to a Windows account, it logs the following warning to the Application Eventlog:
Can't lookup Primary Windows NT Account of mailbox [mailbox name]. Please check for Network problems. Error: [Code]

Most of these warnings are logged when a permission for a deleted account is read, so you can safely ignore the warning. If you wish to omit these warnings, you can turn this option on.

3 Log successful completion of scan cycle: When a scan cycle completes, AgendaX writes an event to the Application Eventlog stating how much time it took, how many mailboxes were read, etc. If you want to omit this event, you can disable this option here.

4 Log time used for each user: If the AgendaX Update Service takes unusually long to scan the configured mailboxes, you can enable this option. It will add an entry to the Application Event log for each mailbox scanned, telling you in detail which operation took how long. This sometimes helps track down problems with overloaded mailbox databases, slow responding domain controllers (address book operations), problems with database servers, etc.

5 Log all database operations to eventlog: If you would like to trace all operations on the database, you can turn this option on. It will either log all operations to the Application Eventlog or to a file.

6 Log bookings created / modified / deleted in the web interface to the AGXBookingLog database table: If you need to be able to trace who booked, modified, or deleted an appointment at what time, you can enable this option. It will add a log entry to the AGXBookingLog table in the AgendaX database for each action carried out in the web interface of AgendaX.

Please note: This option can't log actions performed in Outlook.

4.1.16 License

The company name and license key are tied to each other. Please copy both of them from the Order confirmation email and paste them in the fields provided. When entering the company name manually, take care to write it exactly as stated in the License document (upper / lowercase).

When an invalid company name / license key combination is entered, AgendaX will report an error to the Application Event log once the AgendaX Update Service is restarted and the license key will revert back to '30 Day Trial Version'.

If you have not purchased a license key yet, you can enter "30 Day Trial Version" (without quotes) in this field. AgendaX will then work with 10 mailbox calendars for 30 days before it will expire.

4.1.17 Logon Mailbox

Click  to select a **Logon Mailbox**. This is generally the mailbox of the AgendaX Service account that you created in 2.3.3 Creating an AgendaX Service Account (see page 7). This mailbox is used to log on to the Exchange Server to retrieve Address Book information. If you use AgendaX with **Exchange Server MAPI** (see 4.1.7 Exchange Server Version on page 21), the AgendaX Update Service will dynamically create an Outlook Profile to access this mailbox each time it runs. If you use **Outlook MAPI** on the AgendaX server, the AgendaX Update Service uses the information stored in the Outlook profile you created.

It is important that the Exchange Server version you set in 4.1.7 Exchange Server Version corresponds to the Exchange Server version that hosts the **Logon Mailbox**. If a different version is specified, AgendaX cannot create a profile to log on to the Logon Mailbox.

The **LogonServer** and **LogonMailbox** values in the AgendaX configuration file AgentX.ini define the **Logon Mailbox**. LogonServer is the servername of the Exchange server that hosts the Logon Mailbox. LogonMailbox is the X.500 address of the Logon Mailbox.

If you have a **CAS** Server (Microsoft Exchange Server with the Client Access Service role), specify the CAS Server as the LogonServer value. If you have virtual and physical CAS Servers, select a physical CAS server.

Example for Exchange 2003:

```
[Config]
LogonServer=MSXDTECH
LogonMailbox=/o=dtech/ou=First Administrative Group/cn=Recipients/cn=agendax
```

Example for Exchange 2007 / 2010 / 2013:

```
[Config]
LogonServer=MSXDTECH
LogonMailbox=/o=dtech/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=agendax
```

Example for CAS- Array:

```
[Config]
LogonServer=cas.dtech.com
LogonMailbox=/o=dtech/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=agendax
```

4.1.18 Version

 The version of AgendaX can be seen in the titlebar of the AgendaX Configuration Utility AgendaXCfg.exe. The first 3 numbers determine the version (e.g. 6.0.1).

4.1.19 Patch Level

 The Patch Level of AgendaX can be seen in the titlebar of the AgendaX Configuration Utility AgendaXCfg.exe. The last number determines the Patch Level (e.g. 00)

4.1.20 Links

Useful links to the AgendaX homepage, Service Packs, Knowledgebase, FAQ, and to the Order Form to purchase additional licenses.

4.2 Configuring the AgendaX Web Application

The Administration Homepage is used to configure the most common settings of AgendaX. Other settings can be modified manually in the 'CALAGENT.INC' file (see 'Global settings' later in this chapter).

The Administration homepage can only be accessed by users defined in 'Accounts allowed to access Admin page' in the AgendaX Configuration (AgendaXCfg.exe). See 4.1.5 Administration homepage access on page 20 for more information. You also need to enable 'Integrated Windows Authentication' or 'Basic authentication' on the virtual directory / server set up for AgendaX, so AgendaX can distinguish between users.

The Administration page is divided into the following sections: **Global Settings**, **Display Settings**, **Feature Settings**, **View Settings**, **Categories**, and **Additional Settings**. Click on the appropriate link to jump to the desired section, or use the up / down arrows to jump to the top or bottom of the page. The  button on each section header saves your changes.

If you want to revert all settings to their default values, press the  button at the end of the page.

Help for each setting can be obtained by hovering over the  info icon or by clicking on it.

4.2.1 Global Settings

Global Settings are settings that affect all views (such as time format, language, etc.)

Use the following language setting

Browser will use the language preference set in the Internet Browser.
Administrator defined Default language (below) will set the language for all users to the 'Default Language' setting below.

Default Language	Default language used in overviews (if not Browser language setting is used).
2nd Language displayed	Optional second caption descriptor language. This enables you to show caption descriptors in 2 languages, e.g. English and French.
Time Display	Display time values either with a 24-hour or a 12-hour clock.
Date Entry	Choice of controls to use for selecting dates in the overviews and format used to display them. Note: The Date Picker control needs special Security settings in the browser (see 4.4.5 The (optional) date picker control on page 46 for further information)
Adjust Time Zones	For multiple site configurations only. This setting is only effective if time zone settings are defined per Exchange Server , i.e. if you have an Exchange Server in Los Angeles and one in New York, and all users in the LA time zone have their mailbox hosted on the LA server, all users in the NY time zone have their mailbox hosted on the NY server. For all other setups, i.e. if Exchange Servers are centrally installed or no mapping between Exchange Servers and time zones can be made , you should use the Multiple Time Zones Definition (see 4.1.3 Multiple Time zones definition on page 20) yes: times are shown in the local site's time (e.g., a meeting of a user in the NY site from 1pm to 2pm will be displayed to a user in the LA site from 10am to 11am) no: times are shown in local times (e.g., a meeting of a user in the NY site from 1pm to 2pm will be displayed to a user in the LA site from 1pm to 2pm)

4.2.2 Display Settings

Display Settings affect how views are displayed (colors used, how many days per week to display, etc.)

Insert Ruler Row after	Number of rows, after which a date / hour ruler will be inserted in the overviews to ease navigation
Days per week	Number of days per week displayed
Start hour working day	Start hour of a day (24hr time format, e.g. 6pm = 18)
End hour working day	End hour of a day (24hr time format, e.g. 6pm = 18)
Display only meetings within this time range	When enabled, overviews will only show meetings that fall within the time range entered above (Start / End hour working day)
View Scrolling	Adds a vertical scroll bar if the view exceeds the screen height
Screen Refresh Interval (min)	Page refresh interval in minutes. <i>Please note: This setting only controls after how many minutes the browser page is refreshed. It does not affect the interval in which calendar data is read from the Exchange Server, which can be set in the AgendaX Configuration (see 4.1.12 Interval definition on page 26).</i>
Show Meeting Status / Categories Header	Shows or hides the Meeting Status (tentative / busy / out of office) and Categories filter caption in the overviews.
Show Meeting Status in Overviews	Shows or hides the Meetings Status (tentative / busy / out of office) filter caption in the overviews. When disabled, only the Categories filter caption is displayed.
Show Print Button	Displays a Print Button in the overviews to facilitate printing on gray scale and color printers.
Show Organizer	Displays the organizer of a meeting in the tooltips
Show Attendees	Displays the attendees of a meeting in the tooltips
Date Caption Text color	Color used for text of the Date caption (Date, Month -, Month +, Today, Week -, Week +, etc.).
Name column color	Color used for the Name column (Mailbox names).
Name column text color	Color used for the text of the Name column (Mailbox names).
Ruler color	Color used for the date / time ruler.
Ruler text color	Color used for the text of the date / time ruler.
Ruler active date / time color	Color used to highlight the active day / time.
Text on bars font color	Color used for text displayed on bars (detailed views)
Standard text color	Color used for normal text (such as text in the Personal Groups definition, deleting meetings, and the description text for filters in the overviews).
Subheader Text color	Color used for sub headers (such as the name of the active group or the date display range in the detailed user views).
Evening Color in Detailed User Weekly View	Background color used to display meetings that take place after office hours in the detailed user weekly view.
Meeting Status colors	Colors used to color-code the meeting status. The default colors represent the colors used by Outlook.
Background image Background color	You can display an image as a tiled background for the AgendaX overviews or choose a background color that fits your needs. If the picture is not located in the AGENDA subfolder of your AgendaX Installation, please provide the full URL to the picture, e.g. http://yourserver/virtualdir/pic.jpg <i>Please note: If you specify both a background picture and a background color, only the background picture will be displayed.</i>

4.2.3 Feature Settings

Feature Settings lets you enable / disable various AgendaX features.

Personal Groups	Enable / disable Personal Groups.
Address book A-Z bar	Enable / disable the A to Z bar in the Personal Groups definition to facilitate navigation.
Show Export Link	Enable / disable a link on each overview to export data shown to a *.csv formatted text file (Excel format) <i>Please note: This feature uses the TEMP directory in the AgendaX installation folder to store files. You must grant each user of the web application permission to create files in this folder.</i>
Meeting Booking	Enable / disable Meeting Booking in AgendaX.
Show Book Meeting link in empty places	When enabled, allows you to click on any empty space in the views to book a meeting for the corresponding user.
Send Invitation	Controls whether and how the Send invitation checkbox will be displayed when booking meetings. For meetings booked with Send invitation turned on, AgendaX will send an Outlook meeting request to all attendees. If a meeting request is not sent, users will be notified of new appointments by an email message in their Inbox. In this case, they do not have the option to accept or decline a meeting. set by user - default: on The user can control if a meeting request should be sent to attendees or not. The 'Send invitation' checkbox is checked by default. set by user - default: off The user can control if a meeting request should be sent to attendees or not. The 'Send invitation' checkbox is not checked by default. always send invitation The 'Send invitation' checkbox is not displayed and AgendaX sends Outlook meeting requests for meetings booked with the web interface to all attendees. never send invitation The 'Send invitation' checkbox is not displayed and AgendaX never sends Outlook meeting requests for meetings booked with the web interface. All meetings will be directly booked into the calendars, and an email message informs attendees of the new meeting.
Default Group Selection	Default Group Selection controls whether members of the currently displayed group are automatically selected as meeting attendees when booking a meeting.
Prevent conflicting meeting booking	When enabled, AgendaX will not allow booking a meeting that would conflict with an existing meeting.
Treat meetings marked as free as non-conflicting	When enabled, treats meetings marked as 'free' as non-conflicting meetings.
Meeting form	Allows you to specify another custom programmed form as the meeting entry form.
Never send Outlook Meeting Requests to Resources	When enabled, AgendaX will not send an Outlook meeting request to an attendee added to the 'Resources' field of the meeting booking form. This is useful when your resource mailboxes don't automatically accept meeting requests.
Non- modifiable Meeting Booking Feature	Allows a closed user group to monitor changes made to meetings booked for others. Please see 4.3.2.1 Defining a closed user group that is allowed to book non-modifiable meetings on page 43 for details.
Use Meeting Templates feature	When enabled, displays Administrator- defined meeting templates to choose when booking a meeting. See 0 Meeting templates on page 41 for further information on how to define templates.
Display Resources field Display Categories field Display Status field Display Private field Display Reminder field Display Text field	These settings let you turn on / off several fields of the Book Meeting form.

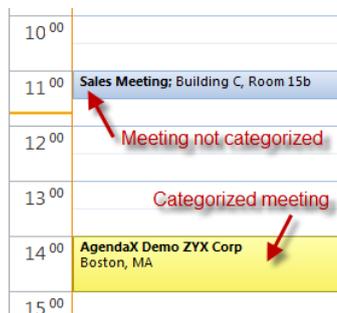
Display Repeat for ... days	<p>This field of the meeting booking form can be used to book repetitive meetings, e.g. a meeting booked on a Monday from 8am to 4pm, repeated for 4 days would book 5 meetings, each from 8am to 4pm from Monday to Friday.</p> <p><i>Please note: The Repeat for ... days does not book meetings on weekends, so if you would repeat the above meeting example for 6 days it would be booked from Monday to Friday and on the following Monday and Tuesday.</i></p>
Require entry of Location	Controls if a location has to be specified when booking a meeting.
Require category selection	Controls if a category has to be specified when booking a meeting.
Enable modifying meetings	<p>Allows you to modify meetings in the AgendaX views. Modifications are automatically synchronized to Exchange Server / Outlook. A modifiable meeting will show 'Double-click to modify this meeting' in the tooltip when you hover over the meeting. Please note that each user can only modify meetings that are also accessible to him in Outlook.</p> <p>Meetings that cannot be modified:</p> <ul style="list-style-type: none"> - Recurring meetings - Meetings in calendars in which the logged-in user does not have write permissions - Meetings with a meeting organizer and attendees can only be modified on the organizer row. <p>All meetings that can be modified will show a small dot on the top left corner of the meeting.</p>
Group Menu	Enable / disable the Group Menu
Show 'All' Group	Enables or disables the 'All' group. This group is automatically generated and consists of all mailbox calendars that are scanned with the AgendaX Update Service.
Group membership required to view group	When this feature is enabled, users will only see the groups in which they are a member. They will also not be able to create Personal groups that consist of members who are part of groups that they are not a member of.
Text search box	Enables or disables the text search box. The text search box can be used to search for text in meeting subjects, locations, organizers, attendees, and custom fields. See 4.2.7 Configuring the full text search feature on page 37.
Show only users with search hits	When a text search is active, show only users that have meetings that match the text search. If this option is enabled, AgendaX shows a 'Highlight hits' button to switch to showing all users (also users that don't have meetings that match the text search) and highlights meetings that match the text search.
Show Favorites	<p>Enable text search favorites. When enabled, shows a Favorites dropdown and users can save / delete their favorite text searches.</p> <p>The saved Favorites are shown to all users.</p> <p>See 4.2.9 Configuring the Search Favorites feature on page 40 for details.</p>
Enable Favorites for selected users only	<p>If you would like to enable the Favorites feature for a closed user group only, you can define the users that have access to this feature in canmodif.inc with the parameter canUseFavorites.</p> <p>e.g.: <code>canUseFavorites="domain\administrator; domain\jeffb"</code></p>
User Information	Enables or disables the User Information, which displays Active Directory information about a user, such as phone numbers, department, title, etc.
E-mail link in User Information	Enables or disables the e-mail link in the User Information, useful to send a quick email to another user.
Show Phone numbers in Name column	Shows phone numbers of employees next to their name in the name column. Phone numbers are read from Active Directory.
Hide meetings marked as free	Hide or show meetings that have a meeting status of 'free'. Outlook sets the meeting status of All Day Events to 'free' by default. Many Outlook users use All Day Events as reminders to remind them of task that they want to do on a certain day. This setting lets you easily hide such entries.
Hide users without meetings	Hide users that have no meetings in the current view. When enabled, only users that have meetings in the current view are displayed, all other users are hidden.

4.2.4 View Settings

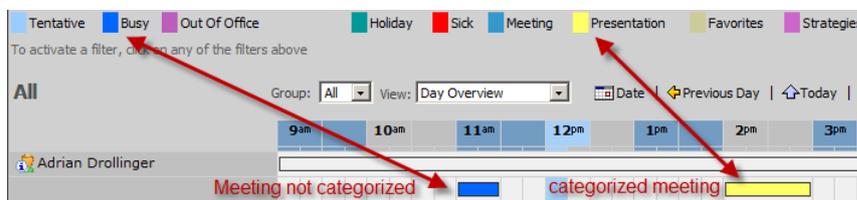
Who is Where View		Enables or disables the Who Is Where View
	Number of columns	Controls the number of columns in the Who is Where View
Dayview - Width of grid		Enables you to set the width of the grid in the dayview as a fixed or dynamic width
Weekly view	weekview.asp	Shows the weekly view with 2 colored bars per day, divided into morning and afternoon. Meeting details are displayed with tooltips when hovering over the bars.
	weekvie3.asp	Shows the weekly view with colored bars, meetings are positioned on a timeline when they occur. Meeting details are displayed with tooltips when hovering over the bars.
Detailed Weekly view	weekvie2.asp	Shows days of the week horizontally and users vertically.
	weekvie4.asp	Shows days of the week and users vertically, while showing hours of the days horizontally.
Monthly view Name column width		Width (in percent of the screen width) of the column that displays the mailbox names in the monthly overview.
Quarter View		Enables or disables the Quarter View.
	Number of months displayed	Number of months to display in the Quarter View (2 – 6).
	Ruler	<ul style="list-style-type: none"> • None: no ruler is displayed • Days: a ruler displaying the day numbers is displayed • Week numbers: a ruler displaying the week numbers is displayed • Both: both day number ruler and week number ruler are displayed
	Week numbers Text color	Color of week numbers on the week number ruler. black & white print view: Color of the week numbers on the week number ruler in the black & white print view.
	Day numbers Text color	Color of the day numbers on the day number ruler black & white print view: Color of the day numbers on the day number ruler in the black & white print view.
	Move by (+/-)	<ul style="list-style-type: none"> • Month: When clicking on  or  in the Quarterly View, the date selection is moved by a month. • Number of months displayed: When clicking on  or  in the Quarterly View, the date selection is moved by the number of months displayed.
	Width of blocks in pixels	Width of meeting bars in the Quarterly View.
	Team Statistics View	
Height of All Day events		Shows All Day Events on the Users detailed Weekly View small or large
User View 1/2		Additional views selectable on the Group Menu

4.2.5 Categories

AgendaX lets you define a set of Outlook Categories. Meetings categorized with one of the defined categories will be color-coded in the overviews. Meetings that are not categorized or categorized with a category that is not defined in AgendaX will be color-coded according to their meeting status (free / tentative / busy / out of office).



Picture 1: Categorized meeting in Outlook



Picture 2: Categorized meeting in AgendaX

You can freely define the list of categories. If you have users that speak another language in your company, you may want to also fill out the '2nd language descriptor' value of each category. This will treat meetings categorized with the according category name in the other language the same as meetings categorized with the category name in the Default language. If, for example, you define a category 'Phone Calls', associate it with the red color, and set the 2nd language descriptor value to 'Appels téléphoniques', your French colleagues meetings categorized with 'Appels téléphoniques' will be colored red in AgendaX just like your meetings categorized with 'Phone Calls'.

Categories can be used as filters in the AgendaX views. By using these filters, you can easily create views that show only specific meetings, e.g. a corporate holiday calendar.

If you want to ensure that all users use the same set of Categories in their Outlook calendar, you can deploy categories by using Group Policies. Please see the following Microsoft KB article for further information:

[http://technet.microsoft.com/en-us/library/cc179073\(office.12\).aspx](http://technet.microsoft.com/en-us/library/cc179073(office.12).aspx)

Selected Categories only

Hide all meetings that are **not** categorized with one of the categories defined above.

Show details for Selected Categories only

Normally, when you use the Selected categories only option, details of the meetings are not displayed. Select yes to still show meeting details when the Selected categories only option is in effect.

Filter Explanation Font color

Color used for the explanation on how to activate / deactivate the filters.

Filter Logic for Categories

Defines the logic of the categories filters when more than one category filter is active. Select **AND** to display meetings that match ALL activated category filters, select **OR** to display meetings that match ANY of the activated category filters.

Logic between Status and Category Filters

Defines the logic when both a Status filter and a Category filter are active. Select **AND** to display meetings that match both the status and category filter, select **OR** to display meetings that match either the status or the category filter.

Break Categories row after

Breaks the Categories filter row after the specified number of Categories.

Show also default Outlook categories

In the meeting booking window, you can show default Outlook categories along with the categories you define here.

4.2.6 Additional Settings

Additional Settings lets you define other AgendaX settings not commonly used, such as a Link to another AgendaX installation, database connection timeouts etc.

Show titlebar in overviews		Allows you to show / hide the title bar in the Main Menu and the overviews for better integration into an existing Intranet. If you disable the Title bar, it will be replaced by a small header and a horizontal line.
Show Titlebar with black background		Lets you enable / disable the black background of the title bar. <i>Note that this setting is only available if no background image is set. If you set a background image, this image will be displayed as a background for the title bar instead of the black bar.</i>
Text color of small header used instead of titlebar		Color of the small header that is displayed if you disable the titlebar
Link to other AgendaX Setup		Allows you to create a link to another AgendaX Setup or another intranet page.
	Icon	Specify the icon to use in the overviews.
Main Menu		AgendaX Main menu and URL of Home navigation button
Collapsible Group Menu		Shows a collapsible list of groups with direct links to the group views in the main menu instead of the standard links to views. Define the list structure to be displayed in multmenu.txt in the AGENDA subfolder. See 4.2.8 Configuring a collapsible Group menu on the Main Menu page on page 38.
Main Menu Text color		Color used for items in the Main Menu (e.g. 'Who Is Where?', 'Agenda Day Overview', 'Agenda Week Overview', etc.)
Main Menu Description Text Color		Color used for description text in the Main Menu (e.g. 'The Snapshot view shows the current availability status of your co-workers', 'Daily overview for all co-workers', etc.)
Header Image		Picture displayed in upper left corner of header in the overviews and on the main menu
Database Connection Timeout (s)		Connection timeout in seconds for connections to AgendaX databases.
Database Command Timeout (s)		Command timeout in seconds for commands carried out on AgendaX databases. Change this value only if you have connection timeouts from the ODBC driver when trying to display any of the AgendaX overviews.
Default Group		Group to show by default. This disables showing all users in the overviews, except when the 'All' group is enabled ("Show 'All' group" setting). All views will always be limited by a group selection.
	UserProfile	The most recently selected group in the Group Menu is the default group displayed.
	Personal	The first personal group is the default group displayed.
	Administrator	The Administrator defined group is displayed

defined group	as the default group selection.
Custom Header	You can specify a custom header, which is displayed using 3 pictures (left, center, and right). The center image is used as a stretchable filler between the left and right images. This header will be displayed on top of the AgendaX header.
Left Header	Picture file to use for the left custom header.
Center Header	Picture file to use for the center custom header.
Right Header	Picture file to use for the right custom header.

4.2.7 Configuring the full text search feature



When the **Text search box** feature is enabled, AgendaX will display a text box in the upper right corner that can be used to search meetings that contain the specified text. Text is searched in subjects, locations, organizers, attendees, and custom fields (such as the meeting text, see 4.1.10 Custom fields definition on page 24).

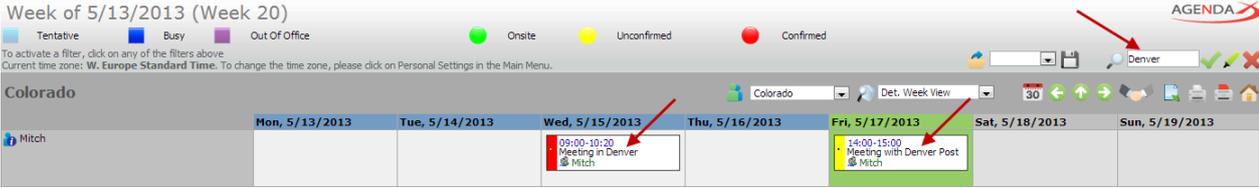
-  Clicking the checkmark or pressing Enter starts a search
-  Clicking the cancel button cancels a search and displays all meetings
-  When the 'Show only users with search hits' option (see 4.2.3 Feature Settings on page 32) is enabled, AgendaX shows only users that have meetings that match the text search. If you would like to see also users and their meetings that don't match the text search, you can click the highlight button to display all users and all meetings. Meetings that match the text search are then highlighted.
-  Clicking on the Cancel highlight button cancels highlighting search hits

Example:

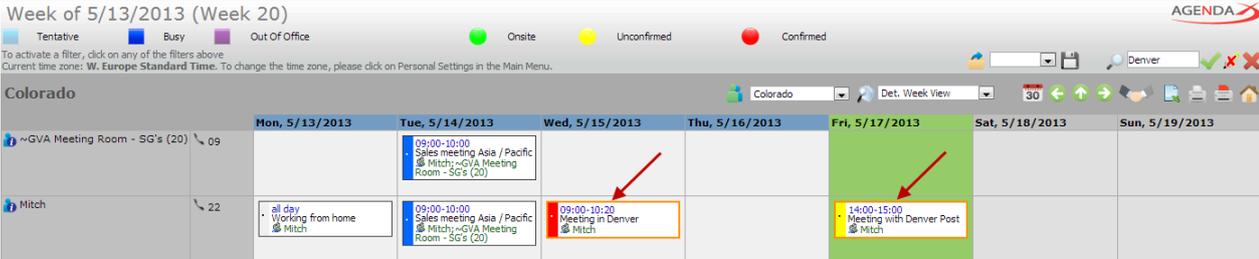
The following view shows all meetings, text search is not active:

Now we enter 'Denver' in the text search box. Only meetings that match the search criteria are displayed. With 'Show only users with search hits' disabled, we still see all users:

With 'Show only users with search hits' enabled, we only see users that have meetings that match the search criteria:



Clicking the highlight button shows all users and all meetings, and highlights the meetings that meet the search criteria:



If you would like to change the highlight color, you can do so by modifying the 'tdhi' and 'tdyrhi' styles in AgendaX.css:

```
.tdhi {border:2px solid #FF8E01; cursor:pointer;font:8pt/8pt tahoma, helvetica;}
.tdyrhi {height:9px; width:100%; cursor:pointer; border:2px solid #FF8E01;}
```

4.2.8 Configuring a collapsible Group menu on the Main Menu page

The standard Main Menu page (homepage) of AgendaX displays links to commonly used views and links to the Personal Groups definition, Delete / Modify meetings, and Administration page.



If, instead, you would like to display a collapsible list of divisions, groups, etc. to make it easy for your users to navigate to the group view they are interested in, you can define a collapsible list that will be displayed on the homepage of AgendaX.



In the example above, groups are structured by location, teams, and skills, and a user can easily find the day view of the Paris office, for example.

You can define this menu structure with as many sub-structures as you want. When users click on a parent element, its children elements are displayed. Therefore, only elements that don't have children can contain links to AgendaX views.

The definition of the structure is stored in **multmenu.txt** in the AGENDA subfolder of your AgendaX installation folder. It's a simple text file with indents. Each additional indent is represented with an additional space character in front of the element name. The example above is defined like this:

```
Office Groups
North America
  Denver
  Los Angeles
  New York\NY
EMEA
  Casablanca
  Dubai\UAE
  Dublin
  Geneva
  Munich
  Milan
  Paris
Asia Pacific
  Beijing
  Hong-Kong
  Sidney
  Singapore
  Tokyo
Team Groups
  Sales
  Marketing
  Support
Skill Groups
...
...
```

AgendaX assumes that an element name corresponds to an Administrator defined global group name (see 4.1.4 Groups definition on page 20). If an element name does not correspond to an AgendaX group name, you can specify the AgendaX group name after the element name, separated with the backslash (\) character. In the example above, the AgendaX group names for New York and Dubai are called NY and UAE respectively.

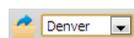
Once you defined your structure in multmenu.txt, enable the 'Collapsible Group Menu' option under 'Additional Settings' on the Administration page (see 4.2.6 Additional Settings on page 36).

4.2.9 Configuring the Search Favorites feature



If you enable the 'Show Favorites' option in the Feature settings of the Administration page (see 4.2.3 Feature Settings on page 32), AgendaX will show a Favorites selector next to the Text search box.

Favorites can store commonly used text searches without typing them into the text search box. Stored Favorites can be seen and used by all users, except if you limit this feature to a closed user group.



Selecting a Favorite from the Favorites selector activates the stored text search.



Clicking the Save Favorite button saves a text search as a Favorite.



Clicking the Delete Favorite button deletes a saved Favorite.

Please note that you first need to activate a text search using the text search box to save it as a Favorite.

If you would like to activate the Favorites feature for a closed user group only, you can set the 'Enable Favorites for selected users only' option (see 4.2.3 Feature Settings on page 32) to 'yes' and define the closed user group in the file canmodif.inc in the AGENDA subfolder of your AgendaX installation folder. Set the canUseFavorites parameter in the file to the list of users that are allowed to use this feature. Separate usernames by semicolons.

Example: canUseFavorites="domain\administrator; domain\jeffb"

4.2.10 Using AgendaX without ActiveX controls

You can use AgendaX without any Active/X Controls, if your corporate security policy prohibits Active/X Controls. Just use the 'AgendaX Built-in Javascript Calendar' as the date selector instead of the Microsoft Date Time Picker control, and disable the Outlook icon that enables you to open Outlook with the corresponding user's calendar by setting

OutlookURL = False
OutlookScript = False

in CALAGENT.INC.

The date selector can be changed on the Administration page of the AgendaX web application.

4.2.11 Meeting templates

If you often book meetings that share the same data, such as same start / end times, same subject, category, or meeting text, you can define Meeting templates. Meeting templates facilitate booking a large number of meetings without entering the same data for each booking.

Meeting templates are stored in the `tmplmtg.inc` file in the AGENDA subfolder of your AgendaX installation directory. They consist of an array of values that appear when you select the template from the list of available templates. You can define an unlimited number of Meeting templates.

The `tmplmtg.inc` file contains 2 sample templates that you can modify to your needs. You can add any number of additional templates by copying and pasting a block of a meeting template definition starting from `MtgTempl(1, 1)` until `MtgTempl(1, 17)` and changing the first index in the array. For the second template, for example, use `MtgTempl(2, 1)` until `MtgTempl(2, 17)`. If you add templates, you also have to modify the dimension of the array to the number of templates you define:

```
Dim MtgTempl(2,17)           'Dimension of the array if you define 2 templates
Dim MtgTempl(5,17)         'Dimension of the array if you define 5 templates
```

Each line in a template definition represents a value that you want to predefine in the template. If a value should not be predefined, because it changes for each meeting you book with the template, set its value to an empty string (2 double quotes).

Array index	Description	Possible values	Example
1	Template name	Any character expression	Phone support shift 9-5
2	Attendee(s)	Any mailbox name(s), separated by semicolons	Adrian Drollinger; Cathrine Hunziker
3	Resources	Any mailbox name(s), separated by semicolons	Meeting Room Sunshine
4	Subject	Any character expression	Support shift
5	Location	Any character expression	Baltimore
6	Category	Any predefined AgendaX category	Support
7	Organizer	Any mailbox name	Adrian Drollinger
8	Meeting status	0=free; 1=tentative; 2=busy; 3=out of office	2
9	Start time	00:00-23:55 for 24 hour clock 00:00 AM-11:55 PM for 12 hour clock, depending on the setting in 4.2.1 Global Settings on page 30	09:00 or 09:00 AM
10	End time	00:00-23:59 for 24 hour clock 00:00 AM-11:59 PM for 12 hour clock	17:00 or 05:00 PM
11	All day event	0 = false, 1 = true	0
12	Private	0 = false, 1 = true	0
13	Reminder	0 – unlimited (number of minutes)	15
14	Send invitation	0 = false, 1 = true	0
15	Non-modifiable	0 = false, 1 = true	0
16	Meeting text	Any character expression	Phone support shift from 9 to 5
17	Repeat for ... days	0 – unlimited (number of days the meeting is repeated). See 4.2.3 Feature Settings on page 32	5

Example:

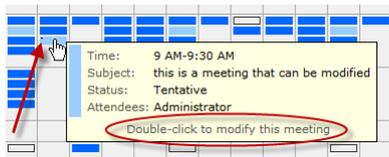
```
MtgTempl(1, 1)="Template 1"           'Name of template
MtgTempl(1, 2)="Adrian Drollinger"    'Attendees
MtgTempl(1, 3)=""                     'Resources
MtgTempl(1, 4)="Subject"              'Subject
MtgTempl(1, 5)="Location"             'Location
MtgTempl(1, 6)="Gifts"                'Category
MtgTempl(1, 7)="Laptop 1"            'Organizer
MtgTempl(1, 8)="3"                    '0=free; 1=tentative; 2=busy; 3=out of office
MtgTempl(1, 9)="09:00"                'Start Time
MtgTempl(1,10)="10:00"                'End Time
MtgTempl(1,11)= 0                     'All day 0=false; 1=true
MtgTempl(1,12)= 0                     'Private 0=false; 1=true
MtgTempl(1,13)= "6"                   'Reminder
MtgTempl(1,14)= 0                     'Send Invitation 0=false; 1=true
MtgTempl(1,15)= 0                     'Non-modifiable 0=false; 1=true
```

```
MtgTempl(1,16) = ""           'Bodytext
MtgTempl(1,17) = "5"        'Repeat for ... days
```

Please make sure that you always enclose text strings in double quotes.

4.3 Modifying meetings

If you allow the 'Enable modifying meetings' feature on the Administration page (see 4.2.3 Feature Settings on page 32), AgendaX will allow users to modify their meetings directly in the AgendaX views. Modifications are automatically synchronized to Exchange Server / Outlook.



Meetings that can be modified by the logged-in user are marked with a dot on the upper left corner. When you hover over the meeting, the tooltip will also show 'Double-click to modify this meeting'. Please note that each user can only modify meetings that are also accessible to him in Outlook.

Meetings that cannot be modified:

- Recurring meetings
- Meetings in calendars in which the logged-in user does not have write permissions

Meetings with a meeting organizer and attendees can only be modified on the organizer row.

4.3.1 Enabling a team to modify other's meetings regardless of permissions in Outlook

If you have a team that should always be able to modify anyone's meetings, and setting permissions on Calendar folders is too complex, you can define a closed user group that is able to modify everybody's meetings.

To define the closed user group, edit the file canmodif.inc in the AGENDA subfolder of your AgendaX installation directory with a text editor and add all accounts that are allowed to modify everybody's meetings to the parameter canModifyOtherUsersMtgs. The users must be separated by semicolons and in the following format: domain\username.

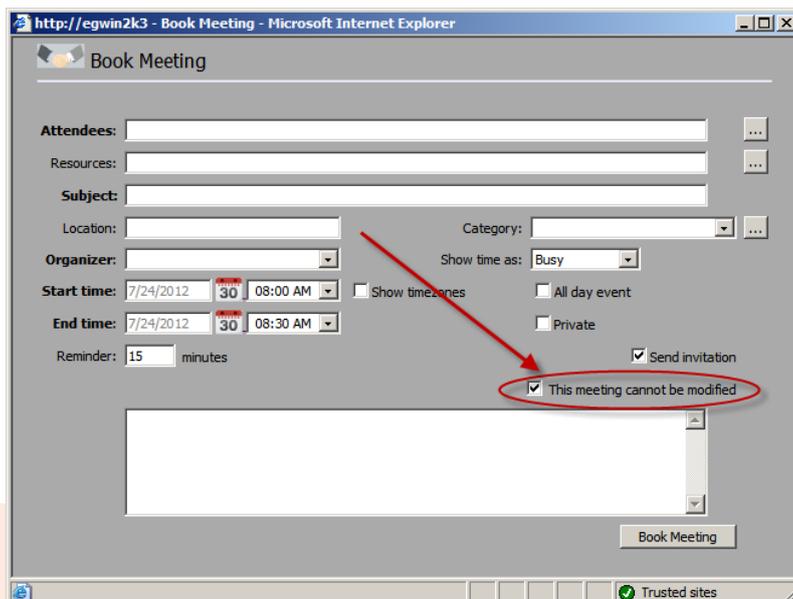
Example:

```
canModifyOtherUsersMtgs ="egwin2k\administrator;egwin2k\adrian;egwin2k\claire"
```

4.3.2 Enabling a team to book meetings that cannot be modified by the attendees

If you have a team (e.g. Service Desk) that books meetings for employees (e.g. Service technicians), and you want this team to have full control over the meetings they book for others, you can enable the Non-modifiable meeting booking feature.

With this feature enabled, the closed user group that is allowed to book such meetings will see an additional checkbox in the 'Book meeting' form:



checkbox in the 'Book meeting' form:

If a meeting that is booked as 'non-modifiable' is later changed or even deleted by the user (in Outlook or AgendaX), the Service Desk is informed of that change. This allows a Service desk to monitor bookings they made and act accordingly, in case users apply changes to the meetings booked by the Service desk.

You can define who is allowed to book such meetings, and which actions (creating,

modifying, deleting) should generate alerts to the moderators.

To setup Non-modifiable meeting booking, please enable the feature on the Administration page (see 4.2.3 Feature Settings on page 32) and add the following entry in the AgentX.ini file in your AgendaX installation folder:

```
[Config]
CheckMeetingModifications=1
```

Then, perform the following steps:

4.3.2.1 Defining a closed user group that is allowed to book non-modifiable meetings

The closed user group that can book meetings as non-modifiable is defined in the file canmodif.inc in the AGENDA subfolder of your AgendaX installation directory.

Edit this file with a text editor and add all users of the closed user group to the canModifyUsers parameter in this file. The users must be separated by semicolons and in the following format: domain\username.

Example: canModifyUsers="egwin2k\administrator;egwin2k\adrian;egwin2k\claire"

4.3.2.2 Change notifications

When AgendaX detects changes in meetings that were booked as 'non-modifiable', it sends alerts to a group of users. This group of users is defined in the NotificationEmail parameter in AgentX.ini:

```
[Config]
NotificationEmail=Administrator; Drollinger, Adrian; Foster, Claire
```

Use Mailbox display names (as shown in the Global Address List in Outlook and in AgendaX) and separate each name with a semicolon.

You can also define which actions create alerts. Possible actions are: on creation, modification, or deletion of an appointment booked as 'non-modifiable'.

Use the following parameters in AgentX.ini to control which actions should create alerts:

```
[Config]
NotifyAdminsCreate=1
NotifyAdminsModify=1
NotifyAdminsDelete=1
```

Each of the above parameters can be set to 0 (no alert) or 1 (alert).

4.3.2.3 Change notification emails

Each action on a meeting booked as 'non-modifiable' will send an email alert to the attendees of the meeting and the group of users defined to receive change notifications (NotificationEmail parameter in AgentX.ini, see above).

The standard notification emails are as follows:

Action	Subject	Text
Creation	A new meeting was booked in your calendar	From: [START][CR] To: [END][CR] Subject: [SUBJECT][CR] Category: [CATEGORY][CR] Booked by: [BOOKED BY]
Modification	A meeting was modified in your calendar	Original meeting:[CR][CR] From: [START1][CR] To: [END1][CR] Subject: [SUBJECT1][CR] Category: [CATEGORY1][CR] Booked by: [BOOKED BY1][CR][CR] New meeting:[CR][CR]

From: [START2][CR]
 To: [END2][CR]
 Subject: [SUBJECT2][CR]
 Category: [CATEGORY2][CR]
 Booked by: [BOOKED BY2]

Deletion A meeting was deleted in your calendar

From: [START][CR]
 To: [END][CR]
 Subject: [SUBJECT][CR]
 Category: [CATEGORY][CR]
 Deleted by: [BOOKED BY]

If you would like to change the text in these email notifications, you can do so by adding the following parameters to AgentX.ini:

```
[Config]
NotifEmailSubject=
NotifEmailBody=
ChangedEmailSubject=
ChangedEmailBody=
DeleteEmailSubject=
DeleteEmailBody=
```

Each of the values of the above parameters can contain substitution values that will be replaced with the actual meeting data. Substitution values are enclosed in square brackets. The following table lists possible substitution values:

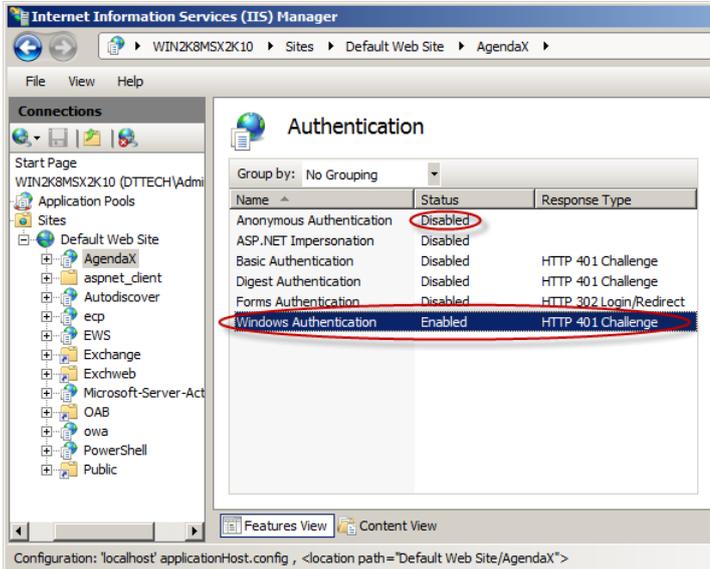
Applies to	Substitution value	Meeting data
all	[CR]	Carriage return
NotifEmailSubject, NotifEmailBody, DeleteEmailSubject, DeleteEmailBody	[START]	Start date and time
NotifEmailSubject, NotifEmailBody, DeleteEmailSubject, DeleteEmailBody	[END]	End date and time
NotifEmailSubject, NotifEmailBody, DeleteEmailSubject, DeleteEmailBody	[SUBJECT]	Meeting subject
NotifEmailSubject, NotifEmailBody, DeleteEmailSubject, DeleteEmailBody	[CATEGORY]	Meeting category
NotifEmailSubject, NotifEmailBody, DeleteEmailSubject, DeleteEmailBody	[BOOKED BY]	Account that booked meeting
ChangedEmailSubject, ChangedEmailBody	[START1]	Start date and time of original meeting
ChangedEmailSubject, ChangedEmailBody	[END1]	End date and time of original meeting
ChangedEmailSubject, ChangedEmailBody	[SUBJECT1]	Meeting subject of original meeting
ChangedEmailSubject, ChangedEmailBody	[CATEGORY1]	Meeting category of original meeting
ChangedEmailSubject, ChangedEmailBody	[BOOKED BY1]	Account that booked original meeting
ChangedEmailSubject, ChangedEmailBody	[START2]	Start date and time of changed meeting
ChangedEmailSubject, ChangedEmailBody	[END2]	End date and time of changed meeting
ChangedEmailSubject, ChangedEmailBody	[SUBJECT2]	Meeting subject of changed meeting
ChangedEmailSubject, ChangedEmailBody	[CATEGORY2]	Meeting category of changed meeting
ChangedEmailSubject, ChangedEmailBody	[BOOKED BY2]	Account that modified the meeting

4.4 Browser configuration

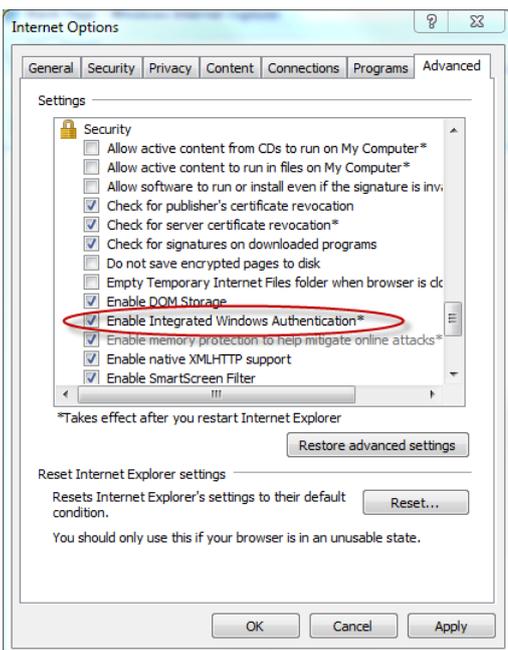
AgendaX is compatible with Microsoft Internet Explorer, Netscape Navigator, Mozilla Firefox and Google Chrome.

4.4.1 Automatic login

AgendaX uses the authentication method configured in the virtual directory (or virtual server) settings on IIS.



If you use 'Integrated Windows authentication' ('Windows authentication' in Windows 2008), an authenticated Windows user does not need to login to use the AgendaX web application. Please make sure that this is the **only** authentication method enabled on your virtual directory / server. If you also enable 'Anonymous authentication', that setting will override all other settings.



In Internet Explorer, Tools / Internet Options / Advanced / Security, you also have to enable Integrated Windows Authentication (enabled by default).

If despite these settings Internet Explorer does not login automatically to the AgendaX web application, please check that the site is recognized to be in your Intranet or Trusted Zone.

Please note: Browsers other than Microsoft Internet Explorer do not know automatic Windows authentication login. With these browsers, you can instead choose to store passwords.

4.4.2 Browser Print Settings

Most of the views in AgendaX use background colors and images to display meetings with different colors. To print AgendaX views exactly as they appear on screen, you have to enable printing background colors and images in your Internet browser. This setting can be found in the options of your browser, please refer to the table below to find the appropriate setting for your browser:

IE 6, 7	Tools / Internet Options / Advanced / Printing / Print background colors and images
IE 8	File / Page Setup / Print background colors and images
Mozilla Firefox	File / Page Setup / Print Background (colors & images)
Google Chrome	Doesn't have this option (yet)
Safari	File / Print. On the Copies & Pages pop-up menu, click Safari. Select Print Backgrounds.
Netscape®	File / Page Setup / Format & Options / Print background (colors and images)

4.4.3 HTTP Error Messages

By default, Internet Explorer shows 'friendly' HTTP Error Messages, instead of detailed errors. If you are experiencing a problem with the AgendaX Web application and you receive an HTTP 500 Server Error, please **DISable 'Show friendly HTTP error messages'** in Internet Options / Advanced / Browsing.

4.4.4 The (optional) Show Calendar Control

AgendaX can optionally use an ActiveX control that enables users to open an Outlook window that displays the selected calendar (provided they have access to it). Some browsers do not support ActiveX controls, so this feature is not compatible with all browsers. On browsers that support ActiveX controls, you also have to enable the following security settings:

- Download signed ActiveX controls
- Run ActiveX controls and plug-ins
- Script ActiveX controls marked safe for scripting

If you wish to disable this feature, please see 4.2.10 Using AgendaX without ActiveX controls on page 40.

4.4.5 The (optional) date picker control

AgendaX provides 2 ways of selecting a date in the AgendaX overviews:

- The AgendaX Built-in Javascript Calendar
- The Microsoft Date Time Picker Control

The built-in Javascript Calendar does not need any special security settings.

The Date Time Picker Control is made by Microsoft and not marked safe for scripting. Unfortunately, we have no way to change this. If you need to use this control (you can enable or disable this control on the Administration homepage), you need to also enable the 'Initialize and script ActiveX controls not marked as safe' setting.

We recommend using the AgendaX supplied date control by selecting 'AgendaX Built-in Javascript Calendar' on the Administration homepage.

Chapter 5: Manually setting up a virtual directory on IIS

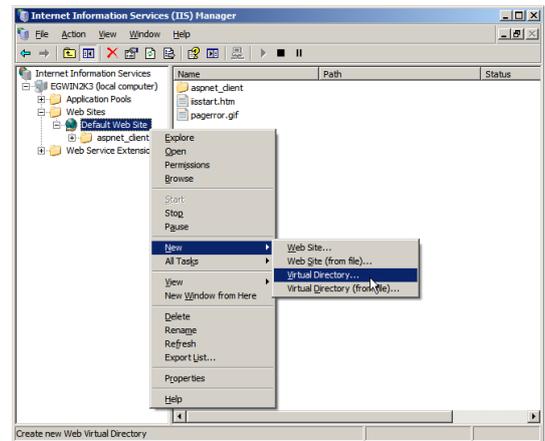
If you prefer to not install IIS6 Management Compatibility, or if you prefer to manually set up a virtual directory on Internet Information Server, please follow the instructions in the current chapter.

The AgendaX Setup wizard is only able to setup a virtual directory on the default Web site of the Server you are running the Setup program.

Before manually setting up a virtual directory, please follow the procedures explained in **2.3.2 Preparing your server for ASP** on page 6 of this manual.

5.1 Setting up a virtual directory on IIS6

In Internet Information Services Manager, right-click the Web site on which you would like to setup the virtual directory for AgendaX, select **New, Virtual Directory**.



In the Virtual Directory Creation Wizard that pops up, click **Next**.



Enter an **Alias** for the new virtual directory you would like to create for AgendaX.

This Alias will determine the URL you will later use to access the AgendaX web application:

<http://website/AgendaX>



Click **Next** to continue

Click **Browse** to select the **path** where you installed AgendaX.

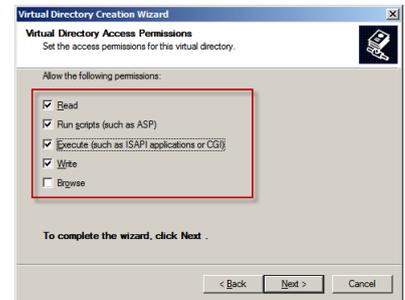
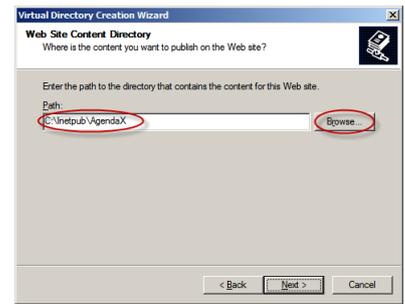
Please note: **Do not** select the AGENDA subfolder of your AgendaX installation, instead, select the main AgendaX folder, e.g. C:\inetpub\AgendaX.

Click **Next** to continue

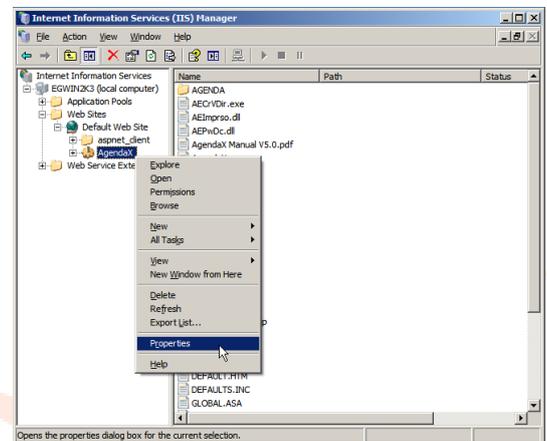
Enable **Read**, **Run scripts**, **Execute**, and **Write** permissions on the virtual directory.

Click **Next** to continue

Confirm the Security warning and click **Finish** to end the Virtual Directory Creation Wizard.



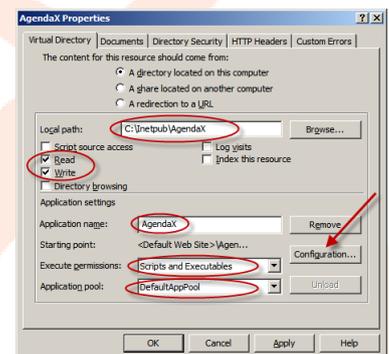
Right-click the newly created virtual directory and select **Properties**.



On the Properties of the new virtual directory, verify

- the **Local path** (Path to AgendaX Installation)
- **Access permissions** (Read & Write)
- **Application name** (Alias)
- **Execute permissions** (Scripts and Executables)
- **Application pool** (DefaultAppPool)

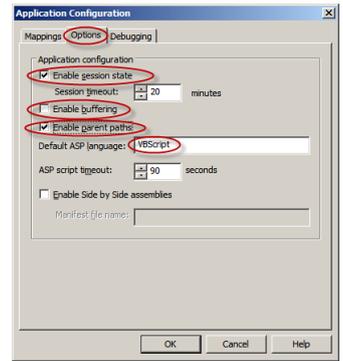
then click the **Configuration** button



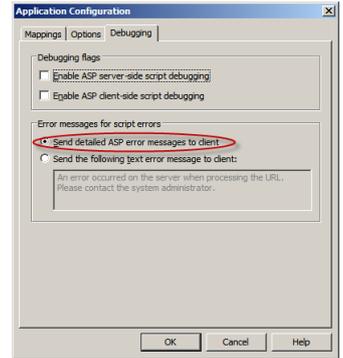
On the **Options** tab,

- **Enable Session State**
- **Disable buffering**
- **Enable parent paths**

and verify that the Default ASP language is set to **VBScript**.

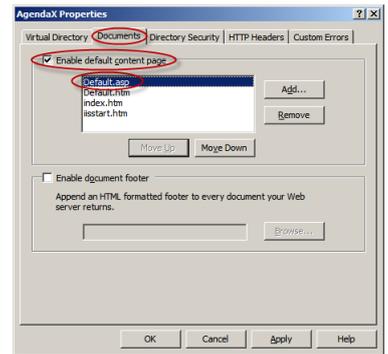


On the **Debugging** tab, verify that **Send detailed ASP error messages to client** is enabled.

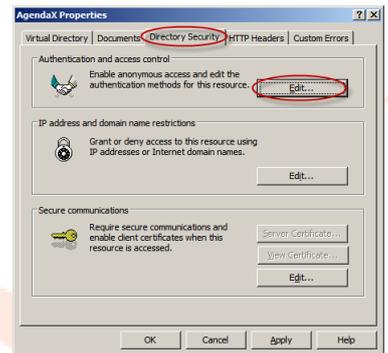


Click **OK** to close the Application Configuration dialog.

On the **Documents** tab of the main virtual directory properties dialog, verify that **Enable default content page** is enabled and move **Default.asp** to the top of the list.



On the **Directory Security** tab of the main virtual directory properties dialog, click the first **Edit** button.



Disable Anonymous access

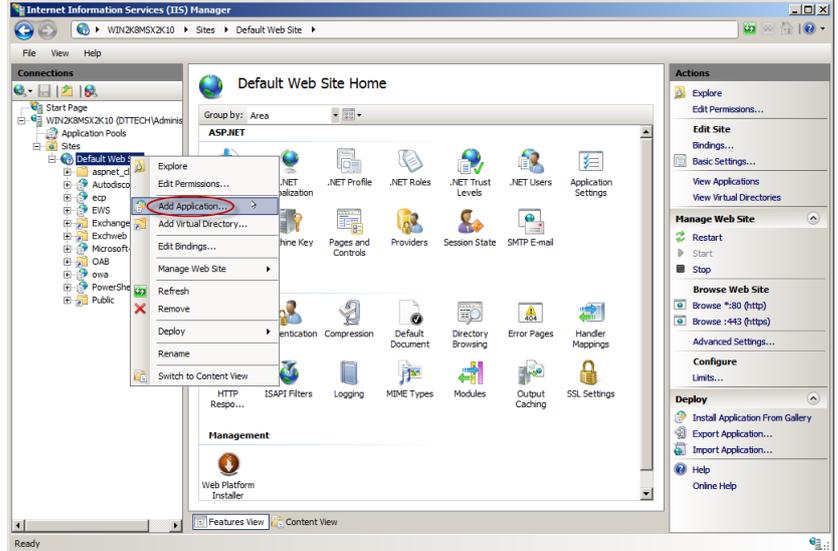
and

Enable Integrated Windows Authentication ONLY



5.2 Setting up a virtual directory on IIS7

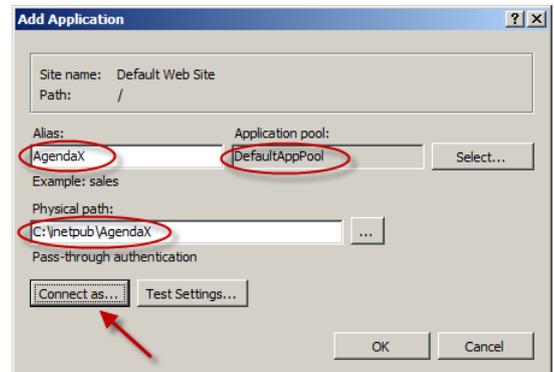
In Internet Information Services Manager, right-click the Website on which you would like to add the AgendaX web application, and select **Add Application**.



Enter an **Alias** for the new virtual directory you would like to create for AgendaX. This Alias will determine the URL you will later use to access the AgendaX web application: <http://website/AgendaX>

Use the **DefaultAppPool** or an Application Pool with similar settings.

Click ... to select the **path** where you installed AgendaX.



*Please note: **Do not** select the AGENDA subfolder of your AgendaX installation, instead, select the main AgendaX folder, e.g. C:\inetpub\AgendaX.*

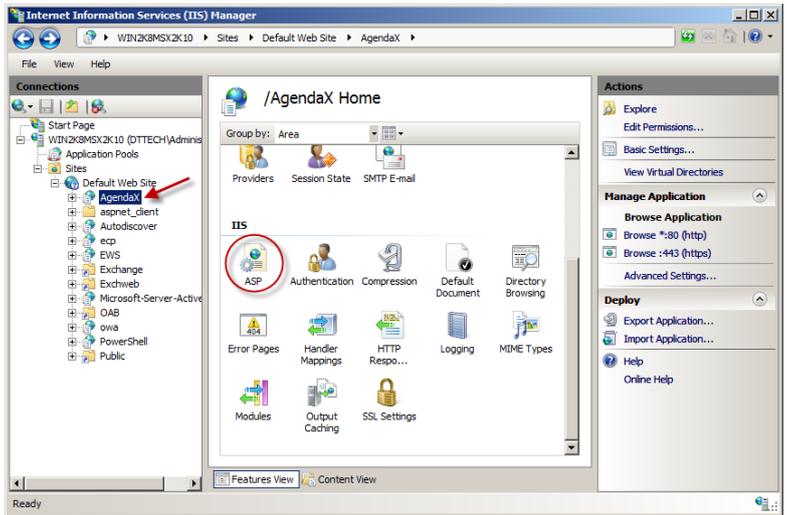
Click **Connect as**

Verify that **Application user (pass-through authentication)** is selected.



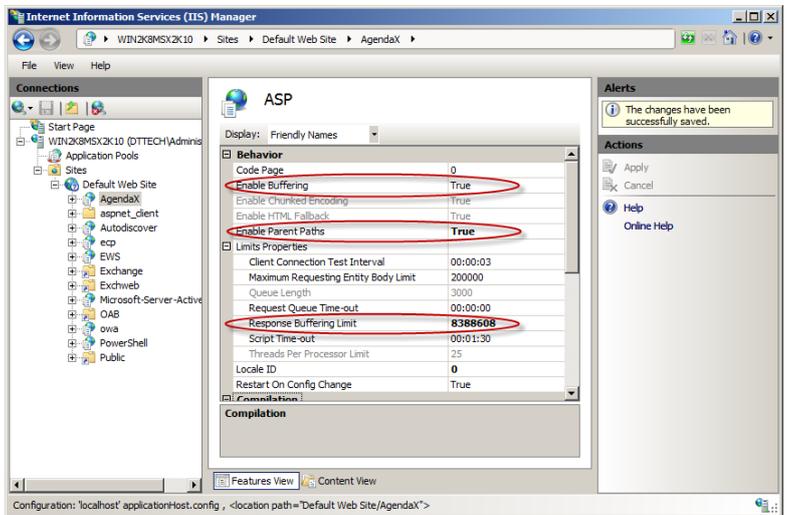
Click **OK**

Click on the new application you just created, and then double-click the **ASP** icon on the right.



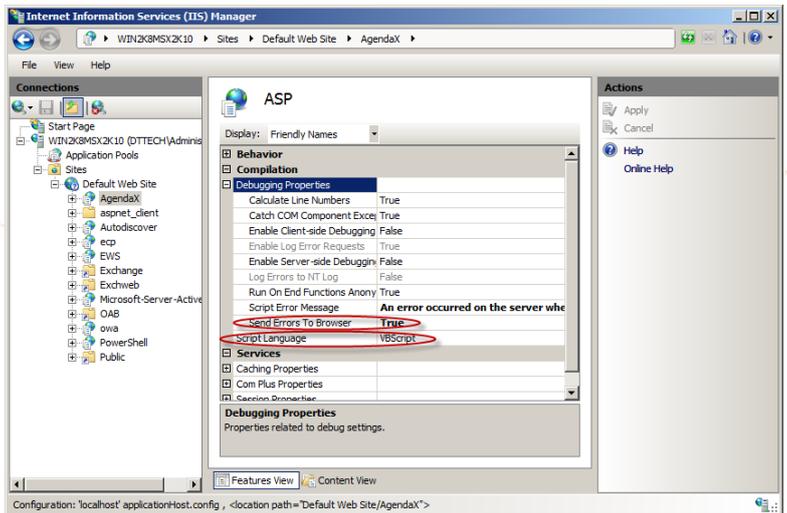
In the ASP / Behavior settings:

- Verify that **Enable Buffering** is **True**
- Change **Enable Parent Paths** to **True**
- Change the **Response Buffering Limit** to **8388608** or higher.



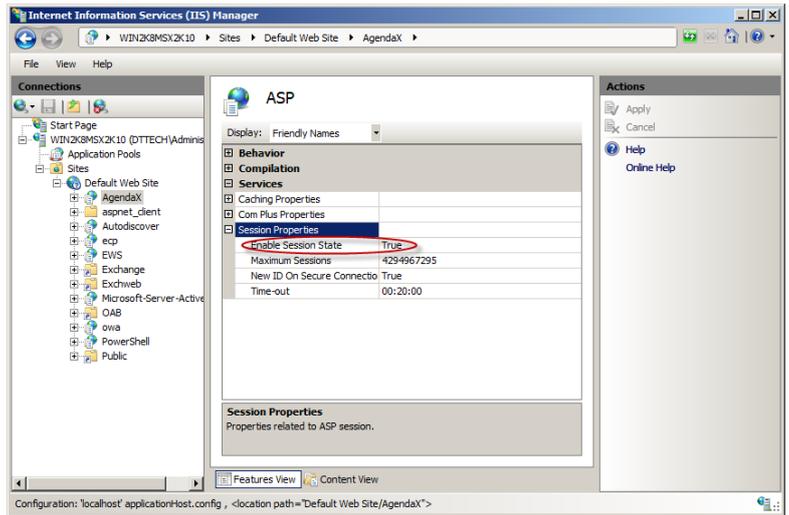
In the ASP / Compilation / Debugging Properties:

- Change **Send Errors to Browser** to **True**
- Verify that **Script Language** is set to **VBScript**

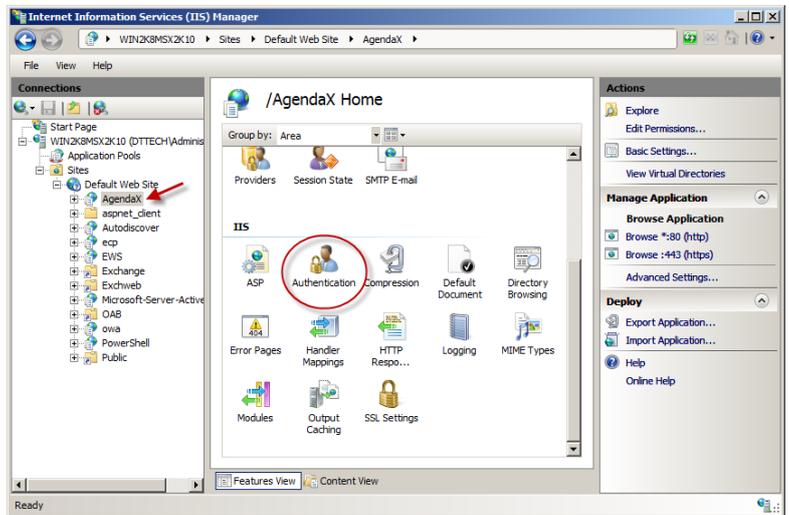


In the ASP / Services / Session Properties:

- Verify that **Enable Session State** is **True**



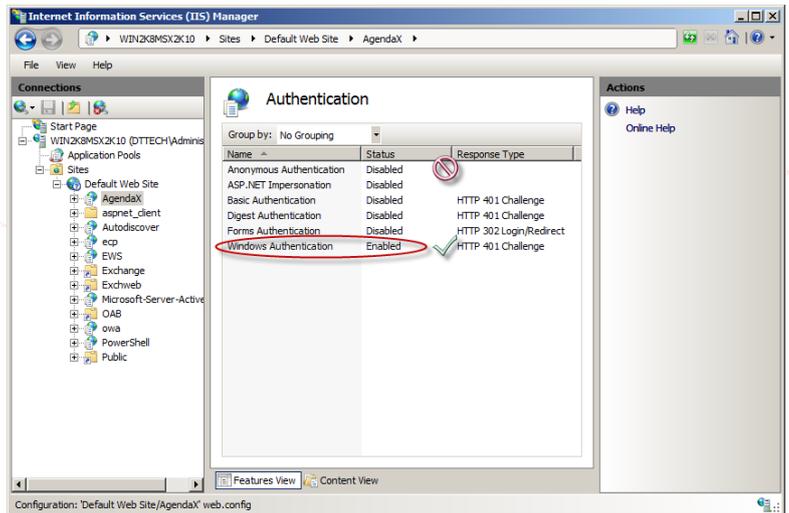
Click on the AgendaX application, and double-click the **Authentication** icon on the right.



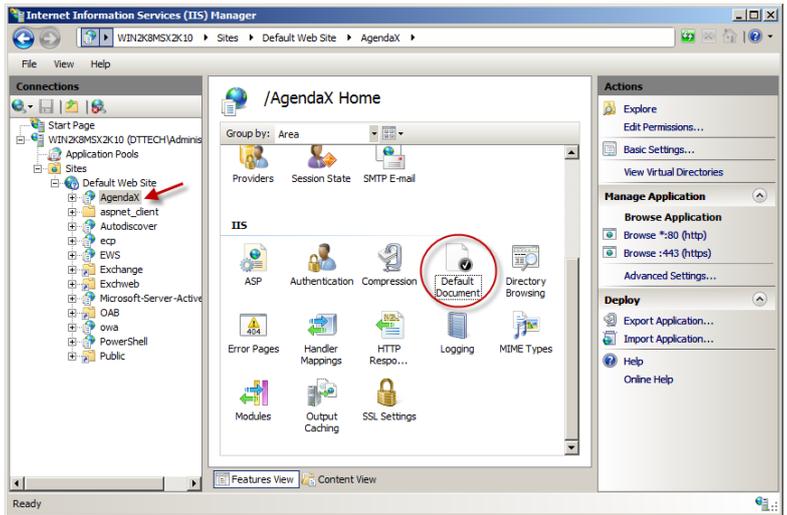
Disable Anonymous Authentication

and

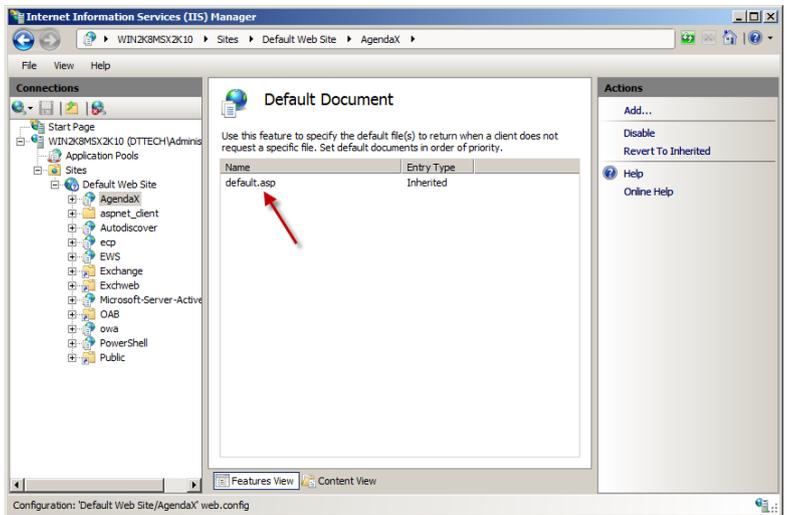
Enable Windows Authentication ONLY



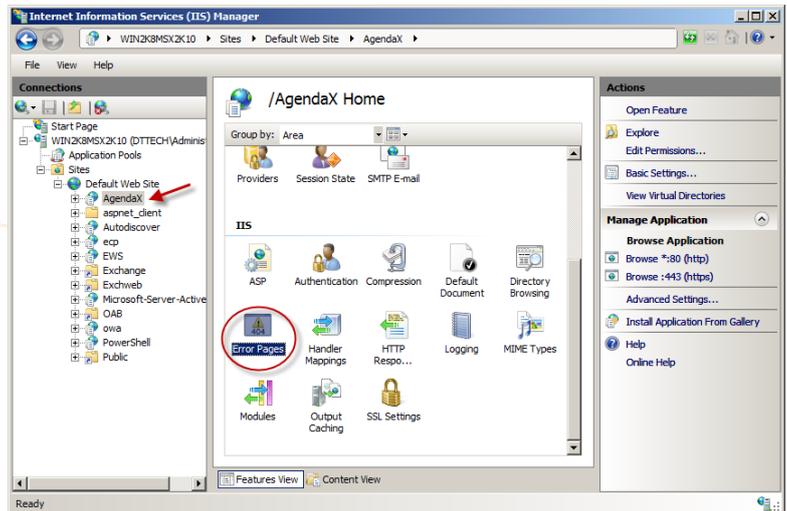
Click on the AgendaX application, and double-click the **Default document** icon on the right.



Move **default.asp** to the top of the list.



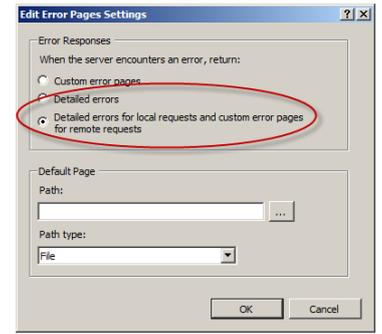
Click on the AgendaX application, and double-click the **Error Pages** icon on the right.



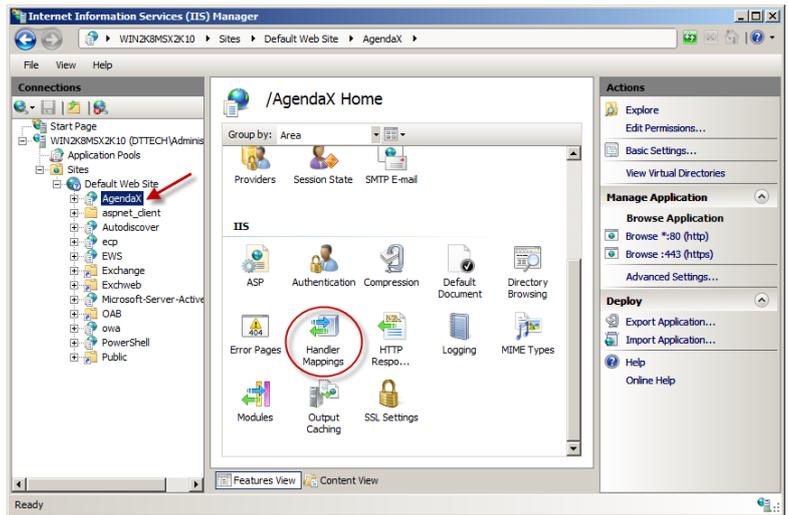
Click **'Edit feature settings'** and make sure that either

- Detailed errors
- or
- Detailed errors for local requests and custom error pages for remote requests

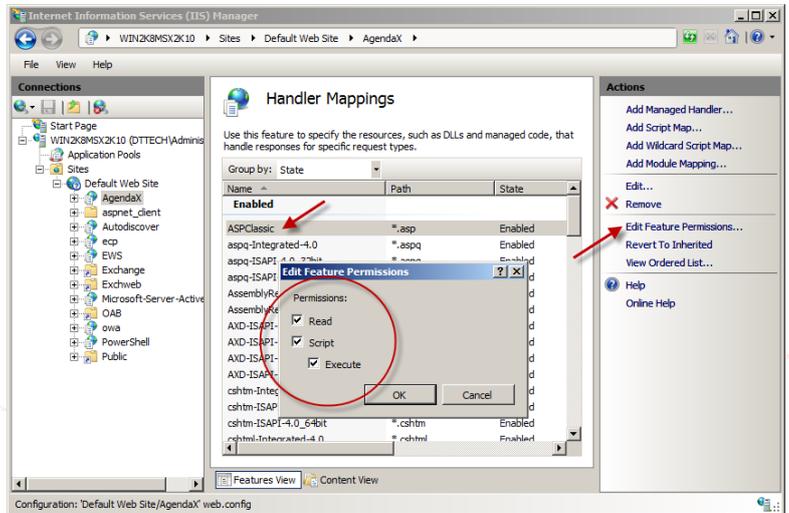
is enabled.



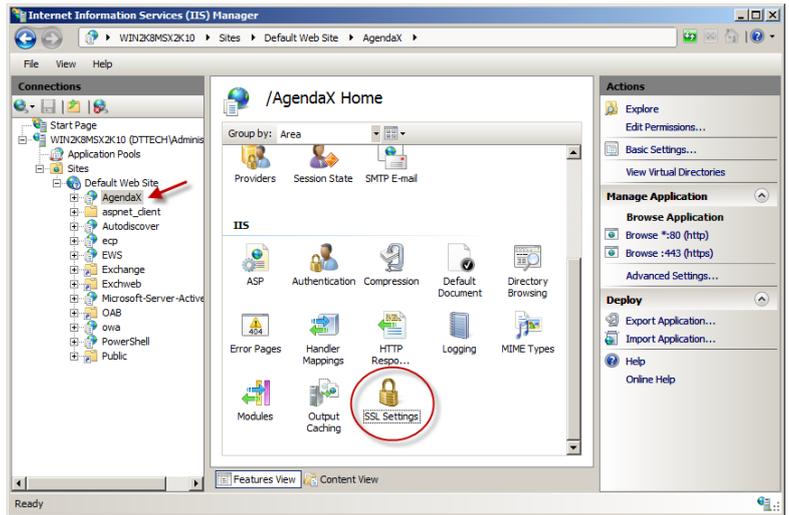
Click on the AgendaX application, and double-click the Handler Mappings icon on the right.



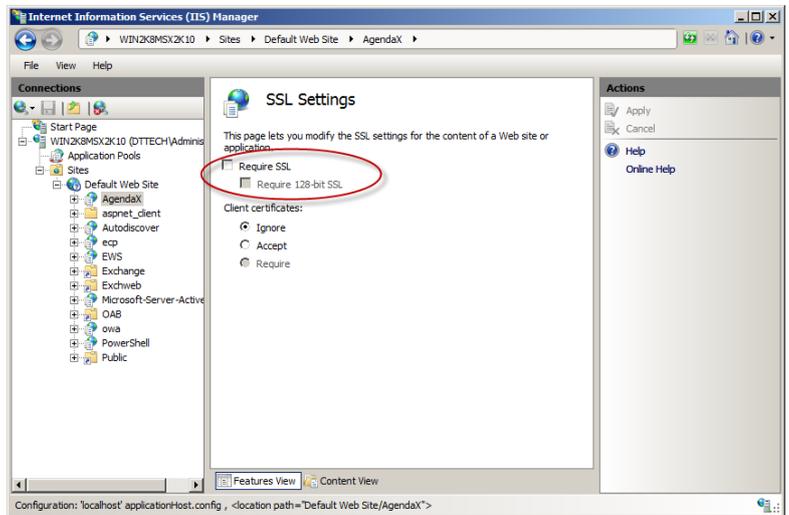
Click on **ASPClassic**, **Edit Feature Permissions**, and verify that **Read**, **Script**, and **Execute** permissions are enabled.



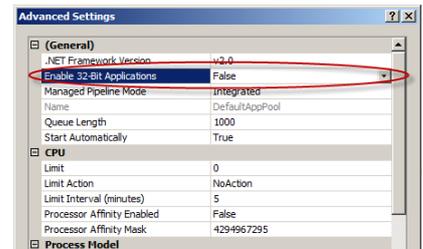
Click on the AgendaX application, and double-click the **SSL Settings** icon on the right.



Depending on whether you want your users to access the AgendaX web application using the **http** or **https** protocol, disable or enable **Require SSL**.



On the **Advanced Settings** of the Application Pool that you use with AgendaX (by default the 'Default Application Pool'), make sure that '**Enable 32bit Applications**' is set to **False**.

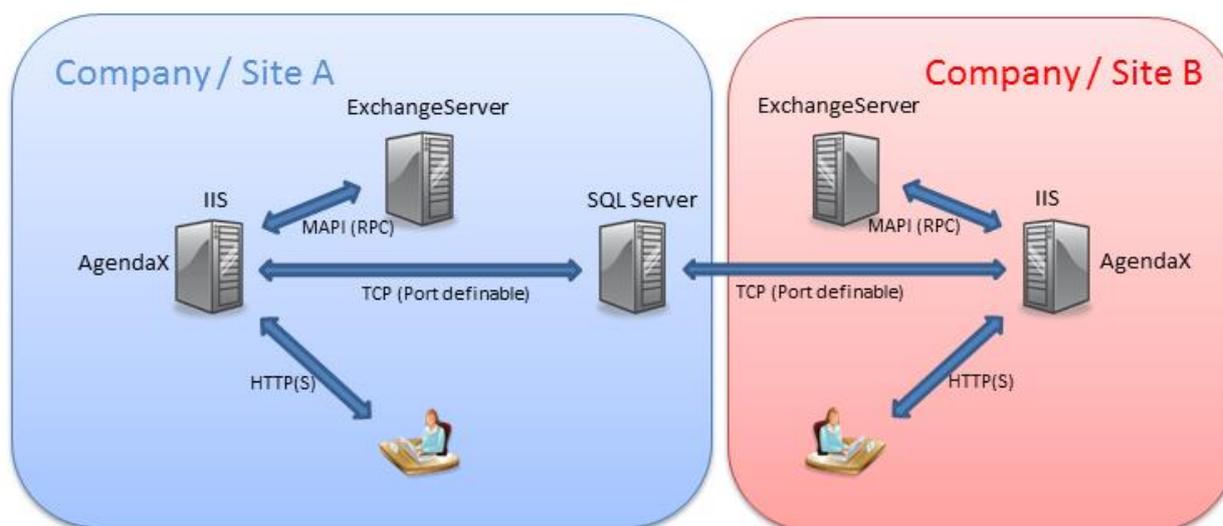


Chapter 6: Connecting different AgendaX Sites

You have several possibilities of connecting different AgendaX sites, even if they don't share the same Active directory forest, domain, or even companies. All connection methods allow you to share calendar data between the sites, view calendars of multiple sites, and even book meetings with attendees of several sites.

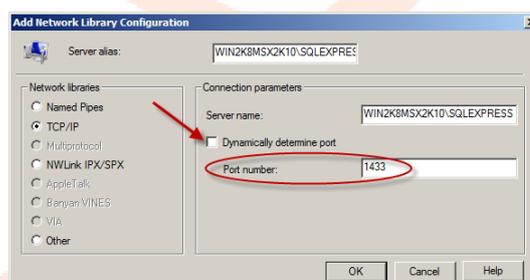
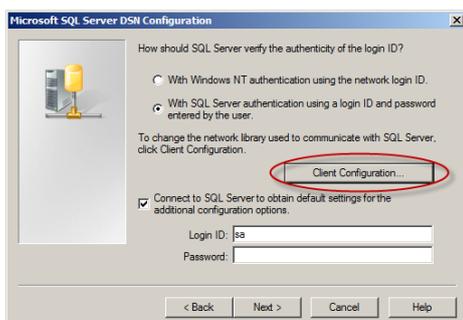
6.1 Connecting sites using a central database

This is the simplest method of connecting different AgendaX Sites. Each site reads its local Exchange calendars and writes the data to a central database that is hosted on one of the sites.



Steps to carry out in this scenario:

- Install AgendaX on both sites. Each site is scanning its local mailboxes only.
- Check the **Multiple Services write to this database** checkbox in the AgendaX Configuration (AgendaXCfg.exe) as explained in 4.1.2 Multiple Services definition on page 20. If you have run the AgendaX Update Service previously and the database tables have been created already, delete all pre-existing database tables in the AgendaX database, as the structure of these tables will change the next time the AgendaX Update Service is started.
- On Site B, click **Config** in the AgendaX Configuration, and edit the data source you created to connect to the database. In the **SQL Server DSN Configuration** wizard, click on **Client Configuration**.



Uncheck **Dynamically determine port** and enter a port number that is open on the firewall of Site A. Edit **AgendaX.inc** in your AgendaX installation directory, and add the port number to the end of the IP

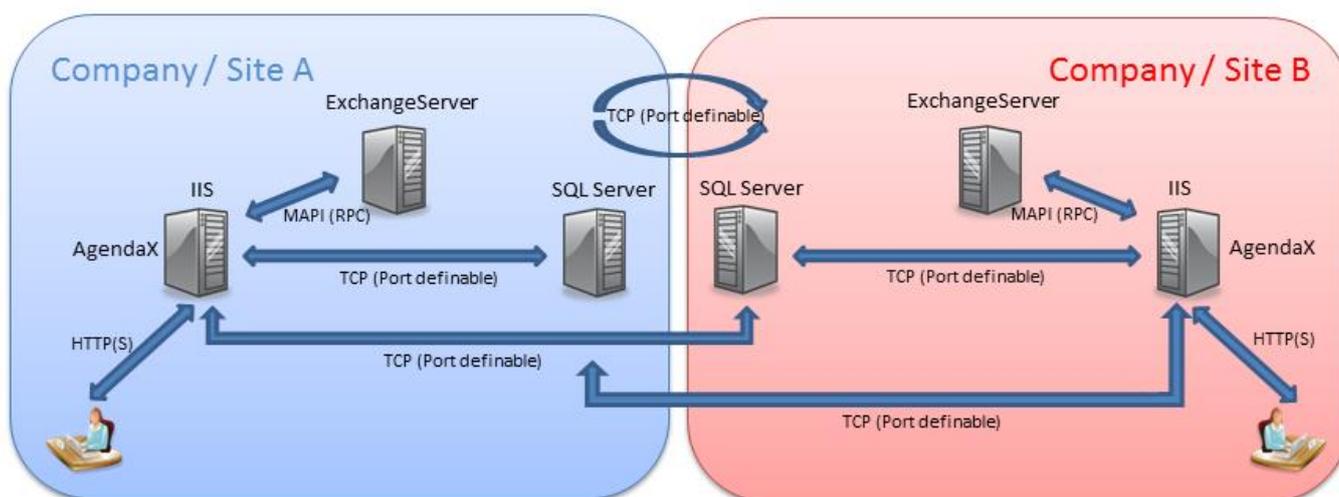
address of the SQL server of Site A. You have to add the port number on the **DBServer** and **Servers(x,13)** lines.

- Change the name of the AgendaX Update Service on Site B with the **AgendaX Multi Service Configuration Utility** that you can download from our website www.agendax.net by first adding a new service and then removing the default AgendaX Update Service. This step is important, as each service writing to the same database must have a unique name.
- If you want users from both sites to appear in the same Administrator defined global groups, you must use the same group names on both sites (see also 4.1.4 Groups definition on page 20).

6.2 Connecting sites using multiple databases

This connection method works as follows: Each Site reads its local Exchange calendars only and writes to a local SQL database. A script on the SQL servers is executed to copy user information (not calendar data) to the other SQL database. The AgendaX web application connects to the databases as needed, depending on which users are involved in a view.

This method is suitable when you need to control which users will be visible on the other site and you want to keep data transfer between the sites to a minimum. It can also be used if you only want users from Site B to be visible on Site A, but not vice versa.



Steps to carry out in this scenario:

- Install AgendaX on both sites. Each site is scanning its local mailboxes only.
- On both sites, create 2 data sources: one that connects to the local SQL database, and another one that connects to the other site's database.
- Add both data sources to the AgendaX Servers definition (see 4.1.6 Multiple Exchange Servers definition on page 20).
- Create a script on SQL Server that creates an intermediate table that can be synchronized to the other SQL server. This table contains only information about the users you want to make visible on the other site. It contains each user's (Status=9) record and the name of the data source on the other site that points to the local database.

Example:

```

- CREATE PROCEDURE [dbo].[fn_agxExportUsers] AS
if exists (select * from dbo.sysobjects where id = object_id(N'[dbo].[Synchronization_Table]') and OBJECTPROPERTY(id,
N'IsUserTable') = 1)
DROP TABLE [dbo].[Synchronization_Table]
CREATE TABLE [dbo].[Synchronization_Table] (
[Name] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NOT NULL ,
[Start] [datetime] NOT NULL ,
[EndTime] [datetime] NOT NULL ,
[Title] [varchar] (250) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[Status] [smallint] NOT NULL ,
[Location] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[Phone] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[Office] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[Initials] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[ACL] [text] COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[Category] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[DL] [varchar] (250) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[Organizer] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[Attendees] [text] COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[Datasource] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[TimeDifference] [numeric] (2, 1) NULL ,
[Alias] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[Department] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[Reserved3] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[AGXBookingNumber] [varchar] (250) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[ProfTitle] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[OffFax] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[HomePhone] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[MobilePhone] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[AdrComment] [text] COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[ACIw] [text] COLLATE SQL_Latin1_General_CP1_CI_AS NULL ,
[AssoNTacc] [varchar] (50) COLLATE SQL_Latin1_General_CP1_CI_AS NULL
) ON [PRIMARY] TEXTIMAGE_ON [PRIMARY]
Declare @WhichTableIsActive varchar(50)
SELECT @WhichTableIsActive = [ActiveTable] FROM [dbo].[AgendaXConfig]
if @WhichTableIsActive = 'AgendaXTable1'
INSERT INTO Synchronization_Table SELECT * FROM [dbo].[AgendaXTable1] WHERE Status=9
else
INSERT INTO Synchronization_Table SELECT * FROM [dbo].[AgendaXTable2] WHERE Status=9
UPDATE Synchronization_Table SET Datasource='Name_of_the_datasource_pointing_to_this_database_on_the_remote_site'
GO

```

Explanation of the above example:

The synchronization table is first deleted and a new one is created. The currently active table is determined by reading AgendaXConfig. It can either be AgendaXTable1 or AgendaXTable2. Then, all records with Status=9 are copied to the new Synchronization table. Each user has one and only one record with Status=9, which contains all the information required by AgendaX related to this mailbox.

Then, the datasource column of each record in the Synchronization table is altered to reflect the datasource name of the datasource on the other site that points to this database.

- This Synchronization table should then be synchronized to the SQL server on the other site, and vice versa (if desired). You can use SQL techniques on the SQL Server to replicate tables across SQL Servers. Depending on your configuration, you may be able to add statements to synchronize the Synchronization table to the other database directly in the stored procedure.
- Then, instruct AgendaX to append the synchronized Synchronization table from the other site to the end of its data table (AgendaXTable1 or AgendaXTable2, whichever is the currently active table). Tables are appended at the end of an AgendaX scan cycle (after all local users' data has been read by the AgendaX Update Service).

Add the following parameter to the AgentX.ini file:

```

[Config]
AppendTable=Name_of_synchronization_table_that_was_synchronized_from_the_other_site

```

- On both sites, instruct AgendaX to execute the stored procedure that creates the synchronization tables, so that the synchronization tables are always up-to-date whilst you add or remove users in AgendaX:

```

[Config]
StoredProcEnd=Name_of_stored_procedure_to_execute_at_end_of_scan_cycle

```

The web application will display the groups that are configured locally and the groups that you defined on the other site. Group membership is stored in the DL column of each user's database records. If you want to make a user part of locally defined groups, you have to alter the DL column of the users' record in the Synchronization table also. In the above example, you'd have to change the UPDATE statement accordingly. It's easier though to use the same group names on both sites, as group membership is handled automatically in this way.

If you don't want to copy all users to the other site, you have to modify the SQL statements that copies the Status=9 records to the Synchronization table, so that only a subset is copied, e.g. ... WHERE Status=9 AND DL LIKE '%//groupname//%', if, for instance, you only want users of a certain group to be visible on the other site.

Chapter 7: Rules

AgendaX lets you define Rules to apply custom Actions on appointments. These Rules change appointments directly on Exchange Server, so use extreme caution when you define rules, as they might change all or a large number of appointments in people’s calendars when incorrectly defined.

We therefore highly recommend to thoroughly test any rules in a test environment on a limited number of mailboxes before using rules in a production environment.

To start using rules, add the following parameters to AgentX.ini, in the [Config] section:

```
[Config]
MasterCategoryList=1
ProcessRules=1
ActionDateFormat=%x
ActionTimeFormat=%X
ActionDateTimeFormat=%c
```

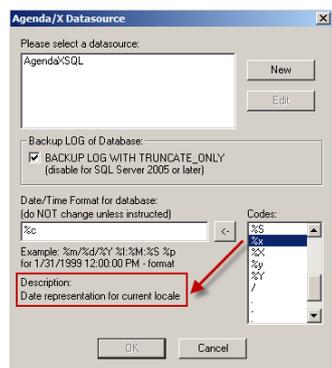
The **MasterCategoryList** switch will add a table called ‘AGXMasterCategoryList’ to the database that can contain a list of allowed categories. This list can be used with the ‘ISINLIST’ operator in a condition (see below).

The **ProcessRules** switch will add AGXRules, AGXConditions, and AGXActions tables to the database. These tables are used to define Rules with Actions based on Conditions.

The **ActionDateFormat**, **ActionTimeFormat**, and **ActionDateTimeFormat** parameters define how date and time values will be printed when using replacement parameters for date / time values in Actions (see below).

The default values used are shown above. They represent the format that is set as the default on the server that is running the AgendaX Update Service. If you don’t need a different format than the standard date / time formats configured on your server, you don’t need to specify those parameters in AgentX.ini.

If you would like to change the format to a different date / time representation than is used on your server, you can use any combination of codes shown in AgendaXCfg.exe / Config, under ‘Date / Time Format for database’. A description for each code is displayed when you click on the code in the list:



Please note: You should not change the date / time format in AgendaXCfg.exe / Config. The list there only shows you the possible codes (or combinations thereof) that you can use in the ActionDateFormat, ActionTimeFormat, and ActionDateTimeFormat parameters in AgentX.ini.

After you insert the above switches to AgentX.ini and you restart the AgendaX Update Service, you will see the newly created tables in the AgendaX database.

7.1 Defining Conditions

Conditions describe what must be met to perform an action on an appointment. An example of a condition could be "if the Subject of an appointment starts with ABC", or "if the appointment is marked as private", or "if the appointment is categorized with the "Business" category.

Conditions can also be combined to give you extra flexibility, e.g. "if the Subject contains the word 'meeting'" **and** "the appointment is categorized with the "Business" category".

Below is a list of possible fields, operators, and values that can be used in conditions:

CondField	CondOperator	CondValue	Description
Private	=	True	If a meeting is marked private or not
		False	Meeting is marked as private
	NOT	True	Meeting is not marked as private
		False	Meeting is marked as private
Subject			The subject of a meeting
	=	Any text	Subject corresponds exactly to CondValue
	NOT	Any text	Subject does not correspond to CondValue
	BEGINSWITH	Any text	Subject begins with CondValue
	CONTAINS	Any text	Subject contains CondValue
Category			Meeting is categorized with a category
	=	Any text	One of the categories must match CondValue
	NOT	Any text	None of the categories match CondValue
	BEGINSWITH	Any text	One of the categories begins with CondValue
	CONTAINS	Any text	One of the categories contains CondValue
	ISINLIST	AGXMasterCategoryList	One of the categories is in AGXMasterCategoryList
ConditionX	AND	ConditionY	Both ConditionX and ConditionY are met
	OR	ConditionY	One of ConditionX or ConditionY are met

Example:

CondID	CondField	CondOperator	CondValue	Matching	NOT Matching
1	Subject	BEGINSWITH	Business meeting	Business meeting London BUSINESS Meeting New York business meeting from 1PM-2PM	London business meeting meeting with business friends prep. for Business meeting
2	Subject	CONTAINS	meeting	Business meeting at 1PM Meeting with Dr. Smith preparing for Business meeting	Business lunch Business meeting Demo at customer site
3	Category	NOT	Meeting	Demo	Meeting
4	Condition1	OR	Condition2	Business meeting New York Preparing for Meeting	Demo at customer site Business meeting
5	Condition4	AND	Condition3	Subject: Business meeting at 1 Category: Demo	Subject: Demo Category: Demo

Please note:

- Only the above fields can be used in conditions. Any other fields will be ignored.
- Only operators defined for a field can be used. The 'ISINLIST' operator for example can only be used with the Category field.
- For combined conditions, CondField and CondValue must contain the word 'Condition' followed by a number of a previously defined condition (CondID) and can only be combined with 'OR' or 'AND'.

7.2 Defining Actions

Actions describe what should be carried out when a condition is met. Currently, you can change or remove the subject or category of a meeting, or change the meeting status (free, tentative, busy, out of office). You can also define placeholders to insert the start and end date / time in the subject of a meeting.

Below is a list of the possible actions and their associated parameters that can be used to define an action:

Action	Param1	Param2	Param3	Param4 ...	Param10
SetValue	Subject	Any text			
		Any text from [PARAM3] until [PARAM4]	FromDate	ToDate	
		Any text from [PARAM3] until [PARAM4]	FromTime	ToTime	
		Any text from [PARAM3] until [PARAM4]	FromDateTime	ToDateTime	
	Status	0, 1, 2, or 3			
	Category	Any text			
RemoveValue	Subject				
	Category				

Currently, only placeholders for the meeting start and end dates / times can be used. More may follow in the future. AgendaX replaces these placeholders in the format specified in ActionDateFormat, ActionTimeFormat, and ActionDateTimeFormat in AgentX.ini.

The status of a meeting can be set to 0 (=free), 1 (=tentative), 2 (=busy), or 3 (=out of office). The meeting status cannot be removed from a meeting.

Please note that the RemoveValue Action does not have any parameters.

Example:

Act ID	Action	Param1	Param2	Param3	Param4	Result
1	SetValue	Subject	Business meeting			Business meeting
2	SetValue	Subject	Meeting from [PARAM3] – [PARAM4]	FromTime	ToTime	Meeting from 3:15 PM – 3:45 PM
3	SetValue	Subject	Out of office from [PARAM3] until [PARAM4]	FromDate	ToDate	Out of office from 3/12/2012 until 3/17/2012
4	SetValue	Status	3			Status = out of office
5	SetValue	Category	Business meeting			Category = Business meeting
6	Remove Value	Subject				Subject is empty
	Remove Value	Category				Meeting is not categorized

7.3 Defining Rules

Rules combine Conditions with Actions. When a condition is met, you can define one or several actions to be performed. Condition and Action IDs defined in Rules correspond to the CondID and ActID IDs in the AGXConditions and AGXActions tables.

CondID	CondField	CondOperator	CondValue
1	Subject	BEGINSWITH	Business meeting
2	Subject	CONTAINS	meeting
3	Category	NOT	Meeting
4	Condition1	OR	Condition2
5	Condition4	AND	Condition3

AGXConditions table

Act ID	Action	Param1	Param2	Param3	Param4
1	SetValue	Subject	Business meeting		
2	SetValue	Subject	Meeting from [PARAM3] – [PARAM4]	FromTime	ToTime
3	SetValue	Subject	Out of office from [PARAM3] until [PARAM4]	FromDate	ToDate
4	SetValue	Status	3		
5	SetValue	Category	Business meeting		
6	Remove Value	Subject			
	Remove Value	Category			

AGXActions table

RuleID	Condition	Action1	Action2	Action3	Action4	Action5	Action6	Action7	...	Action10
1	3	1	4	5						
2	1	3								

AGXRules table

The AGXRules table above reads:

If Condition 3 is met, perform Action 1, then Action 4, then Action 5.

If Condition 1 is met, perform Action 3.

Please note that Rules are evaluated in table order.

If a Condition or Action doesn't exist, the whole rule will be ignored.

Chapter 8: Using AgendaX with its own user management system

Users external to your organization can be given access rights to view staff and resource availability and optionally make bookings. These external users do not need an Active directory account in your domain. Instead, AgendaX offers you its own user management system to handle access from external domains.

This feature can be used as part of an extranet service, for example, to support external consultants working from a known e-mail domain.

Access rights can be granted on a per e-mail domain basis and made subject to password protection via a login screen (e.g. on your partner portal).

User accounts and (encrypted) passwords are stored in the AgendaX database.

You can define password expiration, Administrator alerts when users from un-allowed domains try to register on the site, minimum password complexity rules, and which email server to use for sending out passwords.

Users connecting from an external domain will be presented with the following logon screen:



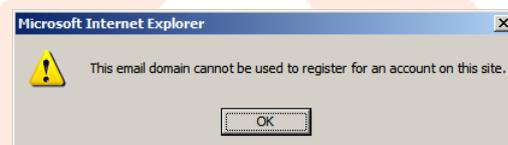
The logo of the logon screen can be changed to fit your needs.

If the external user has not registered before, he can enter his email address and click 'Register'.

In case his email address is on a configured e-mail domain, AgendaX will send him a temporary password.



Otherwise, an error is displayed to the user



and the configured Administrator of the site will receive an alert, informing him of the attempt to register with an un-allowed e-mail address:

```

Somebody tried to register on the Site AgendaX - egwin2k3 with a domain
that is not allowed.

Remote Address: 192.168.1.33
Remote Host: 192.168.1.33
Remote User:
Entered value for username: adrian@egwin3k.com

Allowed domain(s): agendax.net;dttech.com;egwin2k3.com

All Headers: HTTP_CONNECTION:keep-alive
HTTP_ACCEPT:text/html,application/xhtml+xml,application/xml;q=0.9,*/*;q=0.8
HTTP_ACCEPT_CHARSET:ISO-8859-1,utf-8;q=0.7,*;q=0.3
HTTP_ACCEPT_ENCODING:gzip,deflate,sdch
HTTP_ACCEPT_LANGUAGE:en-US,en;q=0.8,fr-CH;q=0.6,fr;q=0.4
HTTP_COOKIE:ASPSESSIONIDQSDDASB=HOLPIMEDNGFBGOMMDFONCHNN
HTTP_HOST:egwin2k3
HTTP_REFERER:http://egwin2k3/agxairbus/agenda/login.asp
HTTP_USER_AGENT:Mozilla/5.0 (Windows NT 6.1; WOW64) AppleWebKit/536.11
(KHTML, like Gecko) Chrome/20.0.1132.57 Safari/536.11
  
```

When the user logs in with the temporary password, he is immediately prompted to change his password:

The screenshot shows a registration form with the following fields: E-mail address, Current Password, New Password, and Repeat New Password. Below the fields are links for 'Register' and 'Forgot Password'. A red error message at the bottom reads: "Your password has expired. Please change your Password."

If the chosen password does not meet the complexity rules defined, the user is prompted to choose another password:

The screenshot shows the same registration form as above, but with a JavaScript alert dialog box overlaid. The dialog box contains the text: "Your new password must be at least 7 characters long, and include 2 digits." with an 'OK' button. The form fields below show the email 'adrian@agendax.net' and password fields filled with dots.

8.1

8.2 Configuring the AgendaX user management system

The following table lists the parameters that need to be adjusted in the AgendaX/AGENDA/calagent.inc file to configure the AgendaX user management system:

Authenticate = True	Must be set to True to enable the AgendaX user management system. If False, the AgendaX user management system is not activated and Windows authentication is used to manage access permissions to the AgendaX web application.
LoginLogo = "agxlogob.png"	Logo displayed on the login screen, must be located in the AGENDA subfolder of your AgendaX installation folder.
AuthAdminEmail = " administrator@egwin2k3.com "	E-mail address of Administrator. When people from another domain try to register on this site, this address will receive notification alerts. This is also the only address that has access to the Administration page and the "Delete Users" page (from the Administration page)
AuthAcctExpiry = 60	Number of days after which an account expires, when it hasn't been used during that time (in this example 2 months).
AuthDomains = "egwin2k3.com;abc.net"	Domains that are allowed to register on this site
AuthSendAlertRegOtherDomain = True	Parameter that specifies if Alerts about users trying to register from another domain should be sent to the AuthAdminEmail or not (True/False)
AuthSmtpEmailComponent = "cdosys"	SMTP component installed to send emails, this can be "abmailer", "aspemail", "asppmail", "aspqmail", "cdonts", "chilicdons", "cdosys", "dkqmail", "dundasmailq", "dundasmails", "freemailsender", "geocel", "iismail", "jmail", "jmail4", "mdaemon", "ocxmail", "ocxqmail", "sasmtppmail", "smtp", or "vsemail"
AuthSmtpMailServer = "EGWIN2K3.egwin2k3.com"	This is the SMTP Server name that sends out emails to users
AuthSmtpSenderName = "AgendaX"	The display name of the sender of emails that the users receive with the generated password
AuthSmtpSenderAddr = " agendax@egwin2k3.com "	The email address of the sender of the emails
AuthSiteName = "AgendaX"	The name of the site (this is mentioned in the emails, e.g. "site name" - Registration)
AuthToken = "\$z_3kt?140275050470b33a)kl?"	This is a token that can be freely set and that enhances security of the passwords stored in the database. Should anyone ever break into the site, you can simply change this token and the site will be secure again. Please note that when you change the token, all passwords in the database will have to be changed, as they will not be valid anymore.
AuthMinPwLength	Minimum password length
AuthMinPwDigits	Minimum number of digits the password must contain

Chapter 9: Upgrading, Installing patches, Moving AgendaX to another Server, Upgrading Exchange

9.1 Upgrading an existing AgendaX installation to a new version

Please follow these steps to successfully upgrade an existing AgendaX installation:

- Stop the AgendaX Update Service
- Make a backup copy of your installation by copying the AgendaX installation directory including all subdirectories to a backup location
- Run Setup.exe and follow the Setup wizard through the Setup process. If you choose the same installation directory, all existing settings will be preserved.
- When asked to overwrite files, select "Yes to all"
- When the Setup wizard has finished installing new files, run AgendaXCfg.exe by clicking the link on your desktop.
- Check that all values are as desired, make configuration changes for new features when needed.
- If you are using a SQL database, drop the database tables by clicking on the button in the data source configuration, accessible by the button. This will delete the AgendaXTable1 and AgendaXTable2 tables in the database. When you restart the AgendaX Update Service, these tables will be automatically recreated.
- Click the button to save configuration changes. When prompted, click to restart the AgendaX Update Service.
- Open the Application Event log and check for possible errors or warnings.
- Wait until a full scan cycle has completed. The following information event in the Application Event log will indicate that the cycle has completed:

```
The AgendaX Update Service reported the following information:
Task finished.
Elapsed Time: 00:00:57.
Mailboxes Scanned: 29.
Mailboxes on other sites (not scanned locally): 0.
```

- Open a browser and check that the AgendaX web application is running correctly.

9.2 Installing a patch

Unzip the downloaded ZIP file to a temporary folder and follow the installation instructions in the "IMPORTANT ReadMe.txt" file.

9.3 Moving AgendaX to another server

If you would like to move your existing AgendaX installation to another server and preserve your settings and groups, you can do so by

- Installing a fresh copy of AgendaX on the new server
- Copying the file AgendaX/AGENDA/config.inc to the new server to copy the settings of the web application (categories, colors, etc.)
- Copying the file AgendaX/AgentX.ini to the new server to copy the settings of the AgendaX Update Service (AgendaX groups, Exchange version, etc.).

9.4 Migrating to a newer Exchange Server version

AgendaX is able to read mailbox calendars on different Exchange Server versions at the same time. As you migrate mailboxes to a newer Exchange Server version, you will always see the complete set of calendars in AgendaX: mailbox calendars on the old Exchange server, and mailbox calendars that have already been migrated to the new Exchange server.

Before and during the transition, there are a few steps that you should carry out to ensure a smooth migration:

9.4.1 Steps to perform before migrating mailboxes

- Upgrade to the newest MAPI version
Download and install the newest CDO/MAPI download from Microsoft:
<http://www.microsoft.com/downloads/en/details.aspx?FamilyID=e17e7f31-079a-43a9-bff2-0a110307611e&displaylang=en>.
If you have Exchange 5.5 Administrator installed on the AgendaX Server(s), first uninstall it.
If you have another Exchange MAPI version installed, also first uninstall it before installing the new MAPI version. The CDO/MAPI download is also compatible with previous Exchange server versions.
- Download and install the newest AgendaX patch. Chances are that your installed AgendaX version is not compatible with the Exchange Server version you migrate to. Therefore, we recommend to always keeping your AgendaX installation up to date by installing the latest patches for the version you purchased. You can download the latest patch from <http://www.agendax.net/download.asp>.
- Move the AgendaX Service account mailbox to the new Exchange Server. This should be the **first** mailbox that you migrate, before attempting to scan other mailbox calendars on the new Exchange server with AgendaX.
- Assign 'Receive As' and 'Administer Information Store' rights to the AgendaX Service account on the mailbox databases (stores) of the new Exchange Server. Please see 2.3.4 Setting permissions for the AgendaX Service account on page 8 for details.
- Once the AgendaX Service account mailbox is migrated to the new server and the Global Address List (GAL) has synchronized, run AgendaXCfg.exe.
- Click the  button next to 'Logon Mailbox' to select the AgendaX Service account mailbox from the address book. Click the  button and select the AgendaX Service account mailbox also as the Notification mailbox.
- Click  and select the new Exchange Server version
- Click  and select an existing entry in the 'Available servers' table, overwrite the Exchange Server name with the name of the new Exchange Server, and click . This will create an additional entry in the 'Available servers' table for the new Exchange Server. Finally, select the new entry and click  to add the entry to the 'Servers to scan locally' list. Click  to save the Servers definition.
- Double-click one of the existing AgendaX groups, add the AgendaX Service account mailbox (or another, already migrated mailbox) to the group, and click  to save the configuration changes. When prompted, click  to restart the AgendaX Update Service.
- Open the Application Event log and check for possible errors or warnings.
- Wait until a full scan cycle has completed. The following information event in the Application Event log will indicate that the cycle has completed:

```
The AgendaX Update Service reported the following information:
Task finished.
Elapsed Time: 00:00:57.
Mailboxes Scanned: 29.
Mailboxes on other sites (not scanned locally): 0.
```

- Open a browser and check that the AgendaX web application shows both the calendars on the old Exchange Server and the calendar on the new Exchange Server that you added to the existing group above.

9.4.2 Steps to perform during the mailbox migration

While mailboxes or distribution lists are moved to the new Exchange Server, you will also have to reselect them from the GAL in the AgendaX groups, since their internal address will change. To do so, run AgendaXCfg.exe, double-click the group, delete the user in the 'Mailboxes / DLs to scan' list, and reselect the user from the Address book.

When new mailbox databases (stores) containing mailboxes that are scanned with the AgendaX Update Service are created on the new Exchange Server, you have to assign the AgendaX Service Account permission to access these stores. Please see 2.3.4 Setting permissions for the AgendaX Service account on page 8 for details.

9.4.3 Steps to perform after mailbox migration has completed

When all mailboxes are migrated to the new Exchange server, you can delete the old Exchange server from the Servers definition in AgendaXCfg.exe by clicking , selecting the old Exchange server, and clicking .

9.5 Changing MAPI versions

If you previously installed the 'Exchange Server MAPI client' and want to change to Outlook MAPI, please perform the following steps:

- Uninstall "Messaging API and Collaboration Data Objects 1.2.1"
- Install a 32bit Outlook client on the AgendaX Server (minimum Outlook 2007 SP2)
- Log in with the AgendaX Service Account on the AgendaX Server
- Start Outlook and create a profile that accesses the AgendaX mailbox. Do NOT enable Exchange Cache mode, and select 'Save password' when you are prompted to log in
- Note the name of the Outlook profile you created in Control Panel
- Log out, then log in with the Administrator or the user that you used to install AgendaX
- Run AgendaXCfg.exe, click 'MSX Version', select 'Outlook MAPI Client' and enter the name of the Outlook Profile you created
- Click Update to save the configuration and answer Yes to restart the AgendaX Update Service.