

A background image showing a person's hands in a light blue shirt writing on a notepad. In the foreground, there is a laptop keyboard and a tablet displaying a document. The scene is dimly lit, with a small potted plant visible in the background.

# IMPORT OUTLOOK DATA INTO QALEIDO COMMUNICATIONS

V 1.5 (English)

## CREDITS

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# INTRODUCTION

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This manual describes the steps necessary to transfer your MS Outlook® data to Qaleido.

If you upgrade from MS Outlook® to Qaleido you'll like to transfer all your data to Qaleido. The Qaleido import tool enables you to do this job easily after you have installed this tool.

If MS Outlook® is installed on the same computer as the computer you access Qaleido Communications through your browser, you can use the tool to import MS Outlook® data directly into Qaleido. It is not necessary to create an export in MS Outlook®. The Qaleido-tool will do the job for you.

If you use Qaleido on a different computer than the computer running MS Outlook® for the mail account you want to import into Qaleido, prior to the import via the tool, you have to export the data from MS Outlook® to an Outlook PST file. Next, transfer the pst file to the other computer, e.g. by way of a USB stick. Next, by means of the Qaleido import tool you can transfer the data to Qaleido.

The computer running the Qaleido import tool, must have MS Outlook® installed too, if not the import of Outlook Data will fail, even if the PST file was transferred to this computer by using a USB stick or other transfer techniques. Furthermore .NET Framework version 3.5 is required for the Qaleido import tool.

Two versions of the import tool are available, namely for the software combinations:

- Windows® (32-bit version) with Outlook® (32-bit version)
- Windows® (64-bit version) with Outlook® (64-bit version)

Other Windows/Outlook® combinations are not supported.

# QALEIDO IMPORT TOOL FEATURES

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The Qaleido import tool allows to import data from MS Outlook® into Qaleido:

- email (all your messages and folders)
- contacts
- calendar
- tasks
- notes

The Qaleido import tool can import data in two different ways:

- direct import from Outlook
- using a pst file

# SYSTEM REQUIREMENTS

If you wish to install the Qaleido import tool on your computer, you should take into account the requirements in the table below:

COMPONENT	MINIMUM REQUIREMENTS
Computer and processor	500-MHz processor
Memory	1 GB RAM
Hard disk	3.5 GB available disk space
Display	1024x576 or higher resolution monitor
Operating system	Windows XP, Windows 7, Windows Vista
.net framework	version 3.5 (or newer)
MS Outlook®	Outlook 2003 (or newer)
Windows/Outlook combinations	Two versions of the Qaleido import tool are available, for these Windows/Outlook combinations: - Windows® (32-bit version) with Outlook® (32-bit version) - Windows® (64-bit version) with Outlook® (64-bit version) Other Windows/Outlook® combinations are not supported.

# INSTALLING THE QALEIDO IMPORT-TOOL

Log-in on your Qaleido-account and download this software to your computer. Please follow the steps below:

- Log-in on your Qaleido-account
- Click the Settings menu
- Next, click the Tools tab
- This tab contains two hyperlinks to the Outlook-Qaleido import tools. Two versions of the import tool are available, for these Windows/Outlook combinations:

- Windows® (32-bit version) with Outlook® (32-bit version)

- Windows® (64-bit version) with Outlook® (64-bit version)

Other Windows/Outlook® combinations are not supported.

Click on the hyperlink that exactly matches your installed Windows/Outlook version.

You should see a window that gives you the choice to save the installation file and/or to run it.

This window and the available options differ for the various browsers (IE, FF, Chrome, etc.).

Save the QaleidoImport.msi file.

Next, use your browser to search for it.

By double-clicking Qaleidoimport.msi (some browsers allow you to do this automatically) will begin installing the Qaleido import tool.

The installation program launches now.

It is possible that a security alert (unknown publisher) occurs:



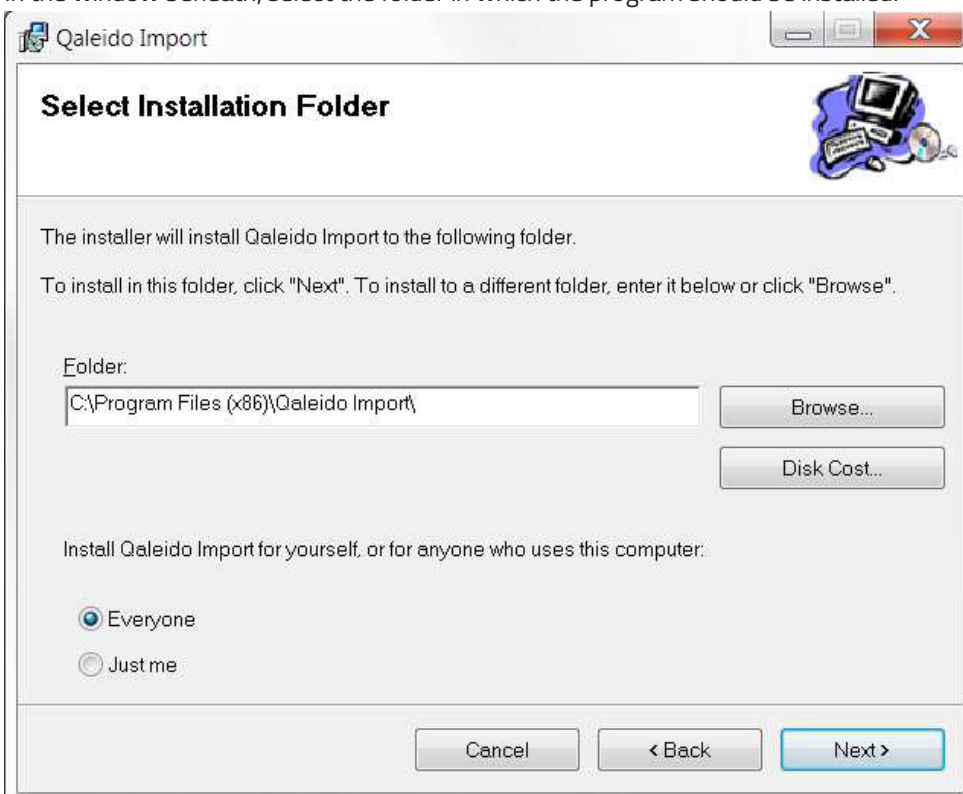
Please confirm you want to proceed by clicking Run.

The next window will display:



Click Next

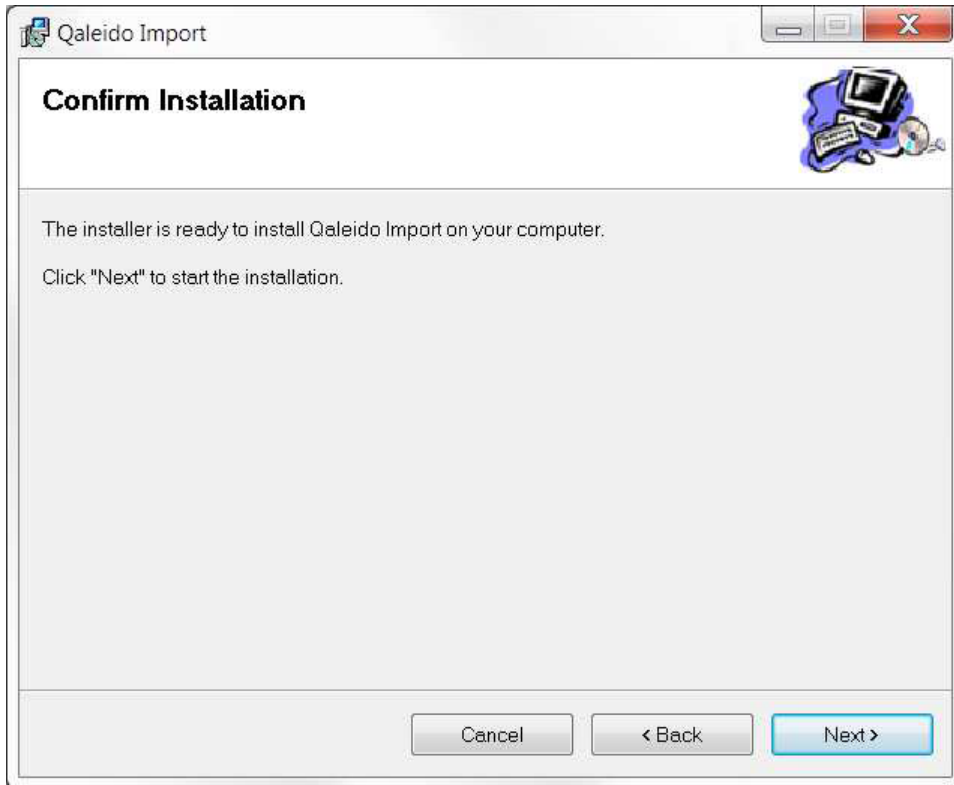
In the window beneath, select the folder in which the program should be installed.



If necessary, change the path (folder) in which the program has to be installed

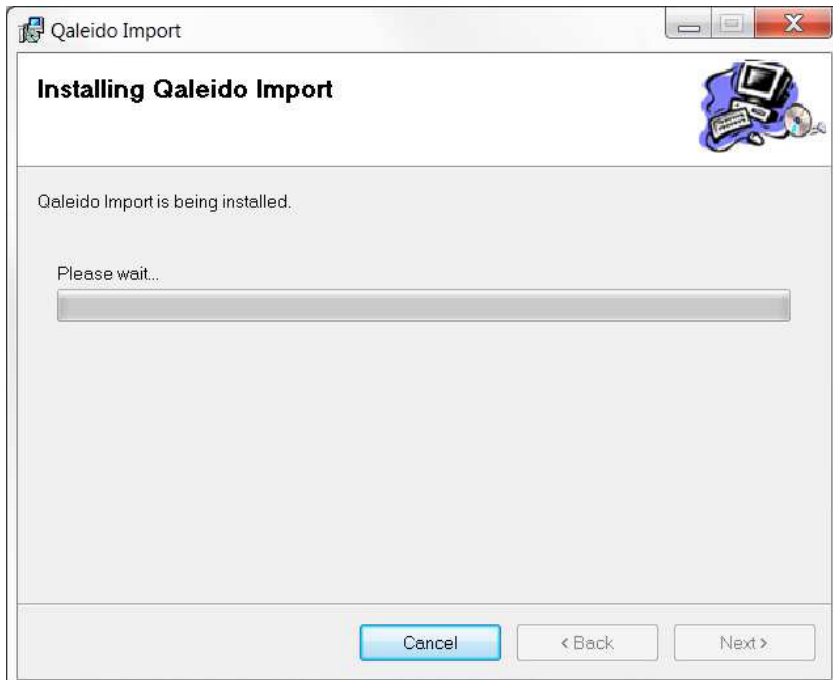
Click Next

Confirm the installation in the window below ...



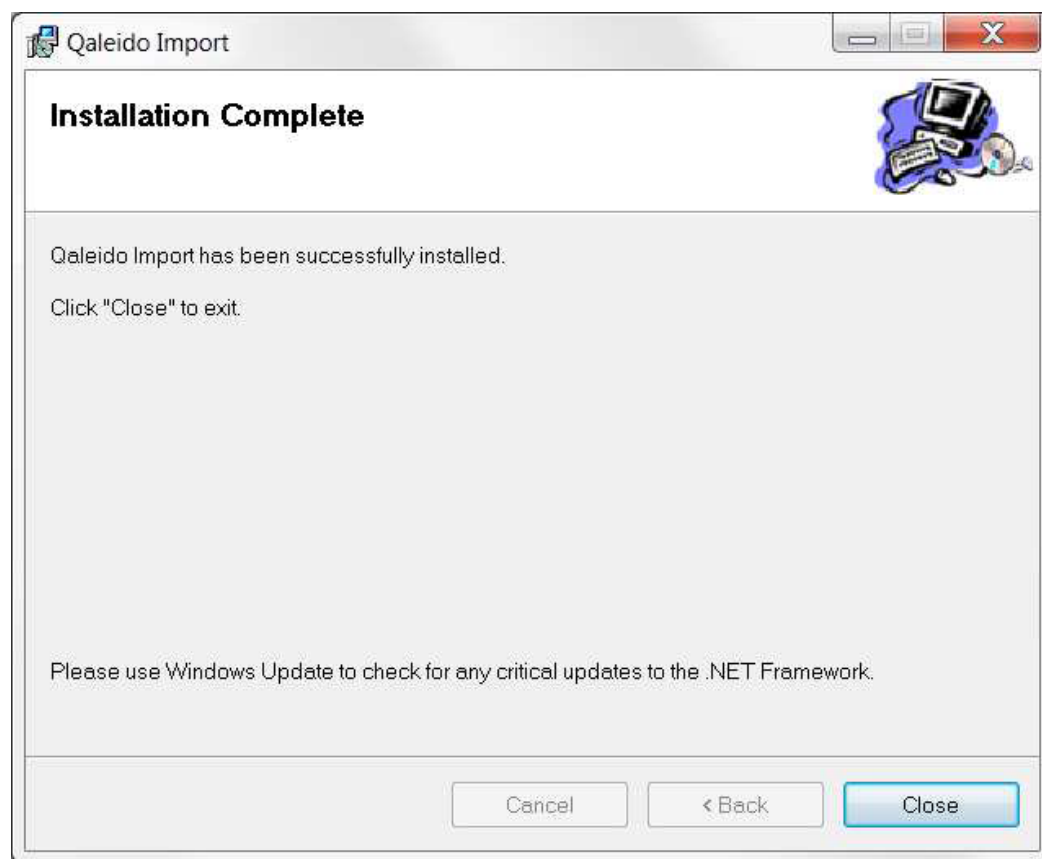
... by clicking Next.

The tool will now be installed:



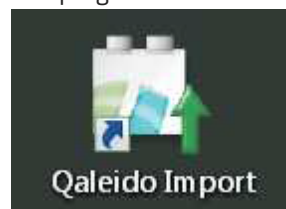
Wait until the program is installed. (It may be that your anti-virus software will be asking in another window whether the program can be installed: Please Confirm installation.)

If the software is successfully installed, this window is displayed:



Click Close

The program is now ready for use. On the desktop is a shortcut.





# INSTALLING THE QALEIDO IMPORT-TOOL

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There are two options:

If Qaleido is being used on the same computer as Outlook, you can use the tool to import the data directly into Qaleido without the need for a prior export of the data from Outlook.

If you use Qaleido on a different computer than the computer where Outlook is running, you must first export the outlook data to an Outlook PST file. Next, transfer the pst file to the other computer, e.g. by way of a USB stick. Next, by means of the import tool you can transfer the data to Qaleido.

The step-by-step instructions show you the way in both cases.

1) Run the "Qaleido Import Tool" by clicking on the shortcut.



The following window appears:



There are two possibilities:

Direct Import from Outlook:

- Activate the "Outlook" radio button and then click Next Step.
- Skip step 2 and continue with step 3 in this manual

Using a pst file:

- Activate the "pst-file" radio button and then click Next Step.
- Continue with step 2 in this manual

2) You have activated the pst file radio button.



Qaleido Import Wizard

Please choose source of export

Outlook

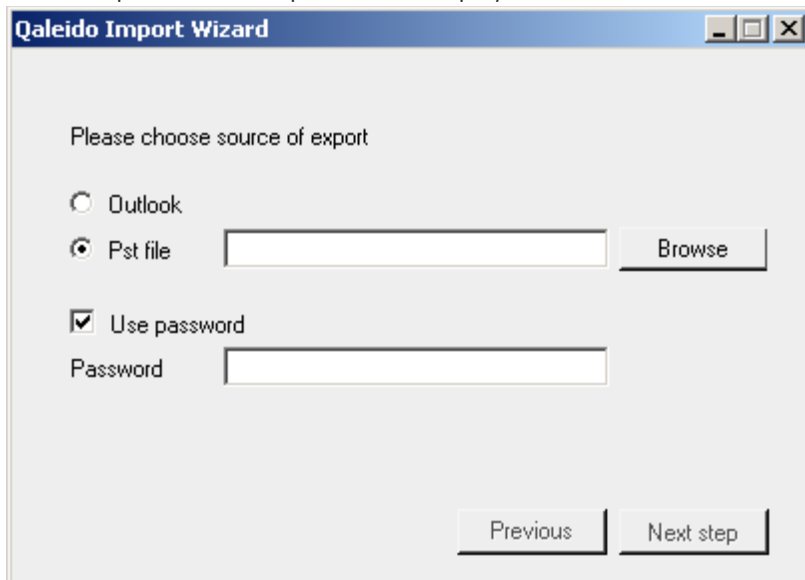
Pst file

Use password

Previous Next step

If the pst file is password protected, you must select the field "Use password".

Now an input field for the password is displayed:



Qaleido Import Wizard

Please choose source of export

Outlook

Pst file  Browse

Use password

Password

Previous Next step

Enter the password.

Click Next step.

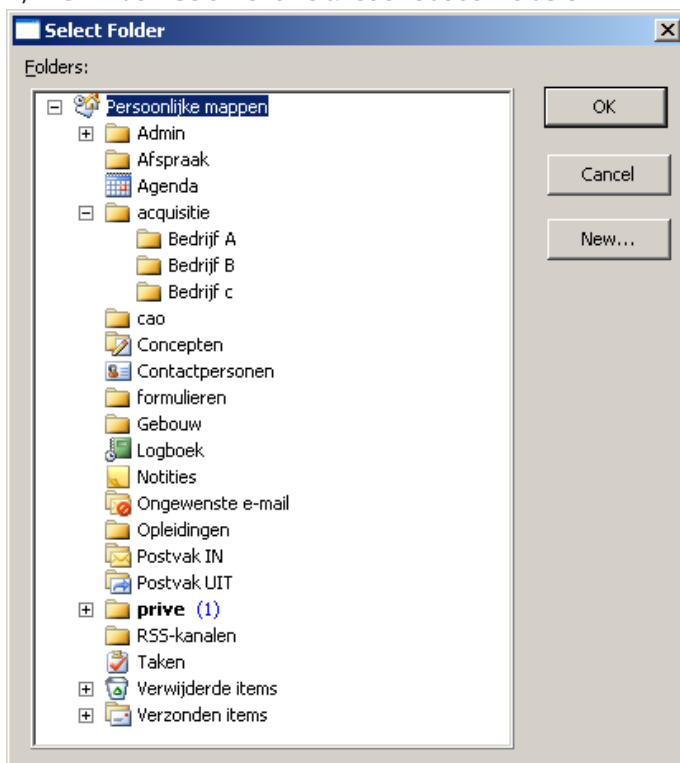
3) If you are planning to import calendar events from Outlook, select one of the options available in the next window:

- All events
- Events that occur in future
- Events that occur in past



Click Next step.

4) The window below shows a list of Outlook folders.



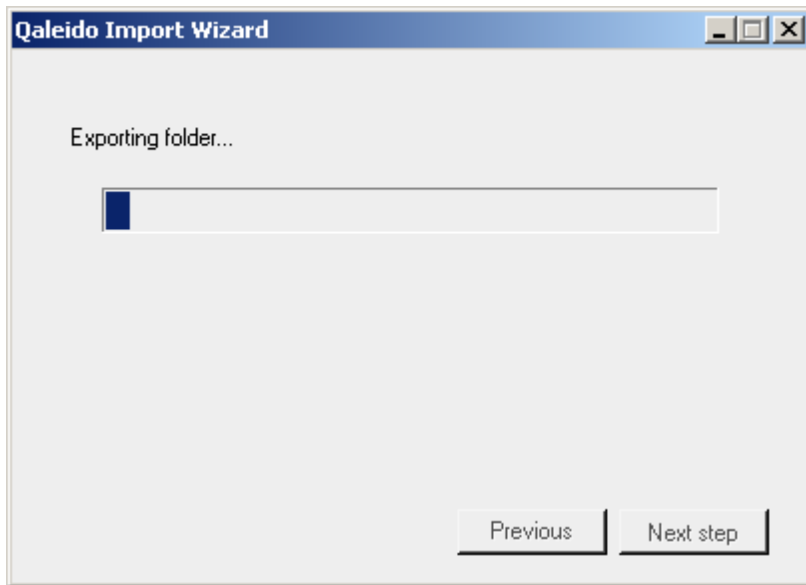
Select the folders (including subfolders) to be imported into Qaleido. (Click Cancel to return to the previous window).

If you select Personal folders, ALL folders including subfolders are selected to be imported into Qaleido. If you prefer to import only the calendar, just select the Calendar folder.

If you prefer to import only Bedrijf A, just select the appropriate folder. If a folder is selected (eg Acquisitie), then all subfolders are automatically selected too (in this example folders Bedrijf A, Bedrijf B and Bedrijf C).

Once you've selected the folder, click OK to continue.

5) The import wizard will now start importing the data. Therefore, first the Outlook data is exported to a temporary directory. When exporting the progress of the export is displayed in a window. Depending on the amount of data the export may take a considerable time (The Previous and Next Step buttons are not active during this export.)



6) After exporting is completed, the window below is displayed. It is used to enter your Qaleido login information:



Please, enter:

User Your Qaleido username

Password Your Qaleido password

Qaleido Server URL <https://webmail.qaleido.com>

Same window, but now with the details filled:

Qaleido Import Wizard

Please enter your Qaleido login data

User uw gebruikersnaam

Password \*\*\*\*\*

Qaleido Server URL https://webmail.qaleido.com

Previous Next step

Click Next step.

7) Based on data entered the next window with five pre-filled fields is displayed:

Qaleido Import Wizard

Choose your e-mail account where e-mails will be imported

E-mail account uw gebruikersnaam@qaleido.com

Incoming mail server imap.qaleido.com

IMAP Username Uw Qaleido Gebruikersnaam

E-mail account Password \*\*\*\*\*

Port 145

Use SSL

Previous Next step

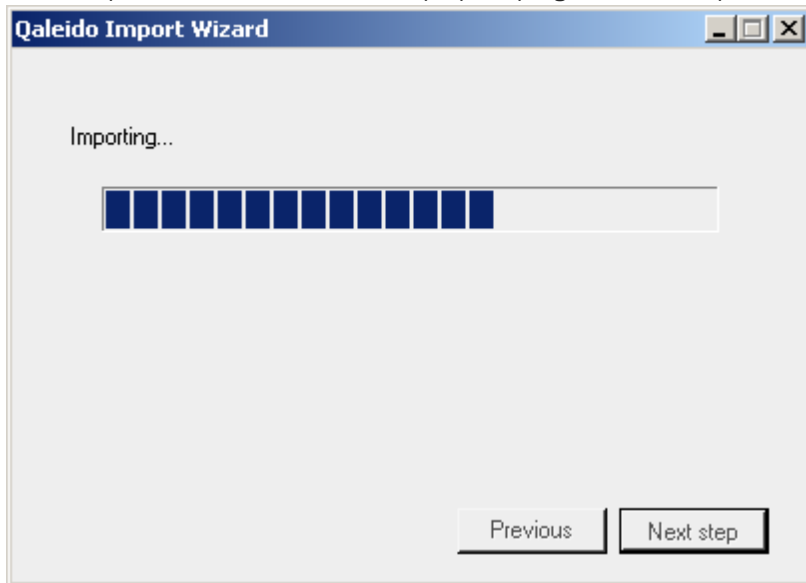
In case you do have multiple e-mail accounts in a single mailbox in Qaleido, you can use the dropdown list to select the account in which the data should be imported (email account).

Check the "Use SSL" check box in order to use the HTTPS protocol. If the "Use SSL" check box is checked, the port must also be changed from 145 into 993.

Do not forget to enter your password (same as Qaleido password).

Click Next step.

8) The import starts. A window will display the progress of the import.



Depending on the amount of data the import may take a considerable time.

9) Once the import is completed successfully, this window appears:



Note: If you are already logged in into Qaleido Communications, in order to see the imported data, please log out and log in again.

# EXCEPTIONS

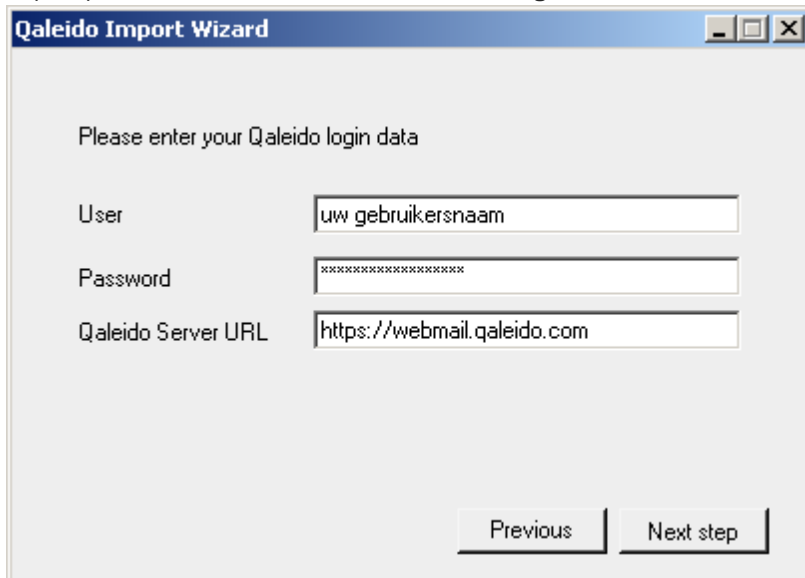
## 1. Incomplete import

When the "Outlook import" tool window is closed while an import process is in progress, a resume is possible during the next restart of the tool. This way the interrupted import process can be completed. Therefore, when restarting the tool, two buttons are available to the user: "Resume" and "Reset"



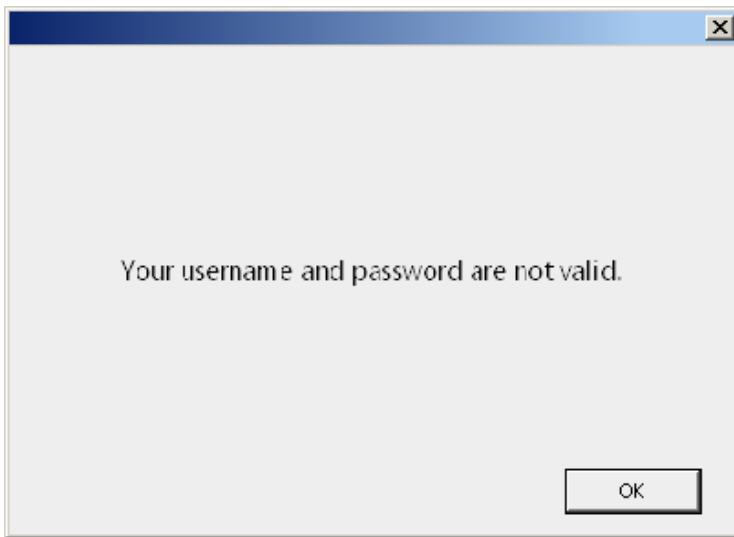
By clicking "Reset", all the previous import data will be removed. The first screen of the tool will be displayed, so that a new import of the data can be executed.

By clicking "Resume", the login data screen will be displayed. After the user fills in the login data, the import process will be executed for the remaining items.



## 2. Invalid login data

When inserting an invalid user name or password and a valid Qaleido URL in the Qaleido login screen, pressing the "Next step" button will display an alert: "Invalid login data".



## 3. Invalid Qaleido Server URL

When inserting a valid user name and password, but an invalid Qaleido Server URL in the Qaleido login screen, pressing the "Next step" button will display an alert: "There was an error while connecting to Qaleido server...".Qaleido

## 4. Invalid mail account password

When importing e-mails, if the Qaleido e-mail account password is invalid, the following message will be displayed:





