Oracle® Outlook Connector

User's Guide

Release 3.4

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Part No. B10096-01

This manual contains the on-line help for Oracle Outlook Connector.

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Oracle Outlook Connector User's Guide, Release 3.4

Part No. B10096-01

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Preface

This manual contains the on-line help packaged with Oracle Outlook Connector. It provides an introduction to many of the concepts involved in using the Oracle Outlook Connector, as well as specific configuration and maintenance information.

Intended Audience

This manual is intended for anyone who is using, evaluating or providing support for Oracle Outlook Connector.

Documentation Accessibility

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Structure

This manual contains ten chapters:

Chapter 1
This chapter contains a quick overview of what's new in this release, what is covered in this manual, and how to find additional help.

Chapter 2
This chapter contains information on the real-time calendaring and group scheduling capabilities Oracle Outlook Connector adds to Microsoft Outlook.

Chapter 3
This chapter describes how Oracle Outlook Connector differs from Microsoft Outlook in dealing with e-mail.

Chapter 4
This chapter describes the account sharing possible with Oracle Outlook Connector, including how to give other users viewing and modification rights to your calendar and mail folders.

Chapter 5
This chapter contains information on using Oracle Outlook Connector to work with mail and calendar items while offline.

Chapter 6
This chapter is a brief description of Oracle Outlook Connector's support for Personal Digital Assistant (PDA) devices.

Chapter 7
This chapter describes a number of issues concerning coexistence and collaboration with users of other Oracle Calendar clients, such as the Oracle Calendar Web client..

Chapter 8
This chapter contains a number of procedures for setting up account and connection preferences.

Chapter 9

This chapter describes maintenance procedures that may be of interest to users.

Chapter 10

This chapter describes some minor features specific to Outlook in a Microsoft Exchange environment that may be altered or no longer available with Oracle Outlook Connector.

Conventions

In this manual, Windows refers to the Windows95, Windows98, Windows XP, Windows 2000 and Windows NT operating systems.

The following conventions are also used in this manual:

Convention	Meaning
. . .	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
. . .	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
boldface text	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.

1

Getting Started

What is Oracle Outlook Connector?

Oracle Outlook Connector is a calendaring and messaging service provider that gives the Microsoft Outlook client access to Oracle's calendar server and any IMAP4-compliant e-mail server including Oracle9*i*AS.

Users benefit through enhanced calendaring features, real-time scheduling, and access to all the other benefits of Oracle's Unified Messaging solutions, including wireless access and full interoperability with a wide range of clients.

Administrators benefit from the scalability, reliability, and availability of a standards-based, application-specific infrastructure.

What's new in this release?

Oracle Outlook Connector 3.4 includes a number of new features and enhancements:

- Full support for Outlook XP and Windows XP

- Ability to switch between online and offline states

- Automatic detection and performance optimizations for slow network connections

- New wireless preferences

- New convenient menu commands to compact mail folders

- Easier folder administration

- Ability to specify folders for automatic refresh

- Ability to tentatively accept multiple meetings in the Inbox

- Ability to forward contacts and appointments by right-clicking

- Appointments and events that span multiple days

- Time ranges for opening other users' folders

- Support for digitally signed and encrypted e-mail

- New progress indicators when synchronizing and opening large folders

- Ability to specify an organization and a reply-to address for the SMTP server

- Improved SSL and TLS negotiation procedures

- Noticeable performance enhancements and significant bug fixes

For detailed information on the new features and resolved limitations, see the Oracle Outlook Connector release notes.

Ways to get assistance while you work

This help describes the new mail and calendaring features that Oracle Outlook Connector makes available to you, and explains how Outlook's behaviour will be different from its behaviour when running against a Microsoft Exchange server.

Because Oracle Outlook Connector does not change most of the basic tasks and options available in Outlook, such as creating and sending e-mail, those tasks are not described here. For help with these tasks, see the Outlook online help or your Outlook user's guide.

For all other information, consult the product documentation supplied on your Oracle Collaboration Suite CD Packs or online at Oracle's Web site.

Setting up Oracle Outlook Connector

If your Oracle Outlook Connector installation was successful, everything should be ready for you to use Outlook for managing your mail and calendar.

You can modify your Outlook profile to configure certain Oracle Outlook Connector preferences and change a variety of information about your user accounts on the mail and calendar servers. For more details, see the **Configuration** section of this help.

It is also recommended that you disable Outlook Add-ins that are specific to Microsoft Exchange, to avoid confusion with Add-ins created by Oracle Outlook Connector. For details, see "Configuring Add-ins".

2

Calendar features

Real-time scheduling

Calendaring with Microsoft Exchange Server is *message-based:* all meetings are created, stored, forwarded and retrieved as e-mail messages. Outlook presents the information differently, but behind the scenes it processes all information as individual e-mail messages.

For example, if you create a meeting and invite a co-worker, Exchange stores a copy of the e-mail containing the meeting in your Calendar folder, and forwards a copy of that e-mail to your co-worker's Inbox. When your co-worker accepts that meeting, Exchange stores a copy in his or her Calendar folder.

There are a number of limitations with this method. For example, in between the time you create the meeting and the time your co-worker accepts it, nobody else can know when that meeting exists by looking at your co-worker's calendar. In fact, nobody else can tell that the meeting exists at all, because it doesn't exist in your co-worker's Calendar folder until he or she accepts it.

Oracle's calendar server, by contrast, stores all users' calendars together in a single database. Each time you look at another user's free/busy time, you are seeing up-to-the-minute information about their schedules, including unconfirmed meetings. Likewise, each time you open a meeting in your Calendar folder, you are getting the latest version directly from Oracle's calendar server, instead of opening a copy of an e-mail describing a meeting that may have been moved or changed without your knowledge.

Attendee availability

When you plan a meeting or view attendee availability for a meeting, Oracle Outlook Connector downloads the up-to-the-minute free/busy information for each attendee from the calendar server database and displays it in the time-line.

Accepted Meetings will appear as busy, tentative or out-of-office time, depending on your choice. Unconfirmed Meetings (which have been scheduled but not yet accepted or declined by the invitees) will appear with white cross-hatching.

Attendee status

Oracle's calendar server automatically tracks the responses of everyone invited to a meeting or event. When you accept or decline a meeting request from your Inbox, Oracle Outlook Connector updates the meeting in the calendar server database immediately, and makes the information available to other calendar users.

You can change your attendance status at any time by opening the meeting in your Calendar folder.

Wireless preferences

Oracle's wireless technology offers users the ability to receive reminders of upcoming events, as well as notifications of newly created and modified events, on their mobile devices. Users can also create new meetings and respond to proposed meetings directly from their phones.

If your calendar system has been configured for wireless services, you can configure your wireless preferences through Outlook.

To configure your wireless preferences:

1. From the **Tools** menu, select **Options**.

2. On the **Oracle Connector** tab, click the **Enable wireless service** checkbox, and click **Wireless Preferences**.

3. In the **Reminders and Notifications** section:

   ■ Click the **Include reminders** checkbox to automatically receive reminders of upcoming meetings and events. Use the **Remind me: X minutes before meeting** box to specify an interval before the start time of every event at which the reminder will be sent.

- Check the **Include notifications when events are created, edited or deleted** check box to receive a message on your phone whenever a meeting that you are scheduled to attend is created, modified or deleted.

4. In the **Services** section, specify the behaviour of your reminders and notifications:

   - Select the **Hold wireless messages** radio button to temporarily stop delivery of all reminders and notifications. For example, you might set this before going into an important meeting to stop your phone from going off.

   - Select the **Always deliver wireless messages** radio button to deliver messages at all times.

   - Select the **Only deliver wireless messages between** radio button to set a time range during which you want to receive messages. Select **Hold outside this period** to save all messages that originate outside this period and deliver them at the beginning of the next time range you have specified. Select **Discard outside this period** to never deliver messages that originate outside your time range.

E-mail notification

You can set up Oracle Outlook Connector to automatically notify invitees by e-mail when you create, modify or delete a meeting. Other Oracle Outlook Connector users already receive the meeting request along with new e-mail in their Outlook Inboxes, but calendar users who may choose another client such as Oracle's native calendar clients for Windows, Macintosh or Motif may prefer to also be notified by e-mail of any changes you make involving their schedules.

To set up automatic e-mail notification:

1. Click the **Tools** menu, select **Options**.

2. On the **Oracle Connector** tab, click **Calendar Preferences**.

3. Select the **Send e-mail notification to attendees when a Meeting is created or updated** check box.

iCalendar notification

You can set up Oracle Outlook Connector to automatically send new and updated meetings in iCalendar format to your attendees. This feature is not intended for the benefit of other users on your calendar server — they automatically have their

schedules updated by the calendar server. However, attendees who use other calendaring systems that support iCalendar can paste the iCalendar attachments directly into their own calendar applications.

To set up automatic iCalendar notification:

1. Click the **Tools** menu, select **Options**.

2. On the **Oracle Connector** tab, click **Calendar Preferences**.

3. Select the **Automatically send iCal notification to non-Oracle Calendar attendees** check box.

Responding to multiple meeting requests

Oracle Outlook Connector offers you the ability to respond to multiple meeting and event requests in the Inbox with a single command.

To respond to multiple requests:

1. Select all the meeting requests you want to respond to.

2. Right-click any of the selected meeting requests and select **Respond to all**.

3. In the pop-up list, select **Accept**, **Decline**, or **Tentative**.

Choosing a name format

You can choose in what format that you want Oracle Outlook Connector to display other calendar users' names. Available display formats are:

- John C. Doe

- Doe John C.

- Doe, John C.

Display formats are reflected in the calendar server Address Book, the **To:** field of meetings and events, and the **To:**, **Cc:** and **Bcc:** fields of e-mail messages.

To choose a name format:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Click **Show Profiles**, select your profile in the list, and click **Properties**.

5. Select **Oracle Outlook Connector** and click **Properties**.

6. On the **Calendar** tab, click **Advanced**.

7. Click the **Address Book User Display:** pull down menu, and select your desired display format.

3

Mail

IMAP vs. POP

With the Post Office Protocol (POP) style of e-mail delivery, e-mail is delivered to a central mail server. When you connect to this server using a client application such as Outlook, all your mail is immediately downloaded to your local machine and deleted from the server. All further processing of e-mail, including opening, moving and deleting, is carried out locally on your computer.

With the Internet Message Access Protocol (IMAP), all e-mail remains on the server until you expressly remove it. You access, manipulate, and create mail folders on the server as if they were stored locally on your machine. What you see in your Outlook client represents folders and mail items actually stored on the server.

For users who routinely access their mail from multiple sources — for example, their computer at work, their computer at home, and a laptop when traveling — IMAP servers can be more convenient than POP servers. Since e-mail is typically deleted from the POP network server after you download it, those messages will be inaccessible if you sign in again using a different machine. With the IMAP delivery model, your e-mail will still be on the server, allowing you to re-read, edit, and forward messages from any machine.

Oracle Outlook Connector can be used with either IMAP or POP e-mail access. By default, IMAP is assumed, but you can use Microsoft's Internet E-mail information service to configure POP access. For details, see "Using POP instead of IMAP".

Subscribing and unsubscribing from IMAP folders

In order to access messages stored on the IMAP server, you must *subscribe* to the folders those messages are stored in. Subscribing to a folder displays it in your Outlook Folder List.

To subscribe to IMAP folders:

1. From the **Tools** menu, select **IMAP4 folders**.

2. In the pop-up list, select **Subscribe/Unsubscribe** to choose folders individually, or **Show All Folders** to automatically subscribe to all available folders.

3. If you selected **Subscribe/Unsubscribe**, click a folder in the list. If you are currently subscribed to that folder, a button below the list will give you the option to hide that folder. If you are currently not subscribed to that folder, the same button will give you the option to show that folder.

   Folders that you are currently subscribed to have their names written in bold type.

   If you select a folder that has subfolders inside it, the **Show/Hide Sub-Tree** button will become available, giving you the option to set all subfolders to the same state with a single click.

   If you subscribe to an IMAP folder using a different mail client or a different installation of Oracle Outlook Connector, you will not see that folder in Outlook until you either reset your folder list or show all folders.

To subscribe to public folders:

1. Open your Folder List, and right-click on the top level of the Public Folders tree.

2. Click **Properties**, and go to the **IMAP4 Folders** tab.

3. Click a folder in the list. If you are currently subscribed to that folder, a button below the list will give you the option to hide that folder. If you are currently not subscribed to that folder, the same button will give you the option to show that folder.

   Folders that you are currently subscribed to have their names written in bold type.

   If you select a folder that has subfolders inside it, the **Show/Hide Sub-Tree** button will become available, giving you the option to set all subfolders to the same state with a single click.

Purging deleted messages

If you use multiple mail clients to access the same IMAP server, you can instruct the mail server to clear messages you have deleted in Outlook from the folders displayed in your other mail clients.

To purge deleted messages:

1. From the **Tools** menu, select **IMAP4 folders**.

2. In the pop-up list, select **Purge Deleted Messages**.

Retrying mail delivery

If Oracle Outlook Connector encounters problems delivering e-mail, it will automatically attempt to resend the mail after a short interval. You can set the maximum number of times Oracle Outlook Connector will retry sending your outgoing e-mail.

To set a maximum for delivery attempts:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Select **Oracle Outlook Connector** and click **Properties**.

5. On the **SMTP** tab, click **Advanced**.

6. In the **Retry sending unsent e-mail message every _ minutes** box, enter the time interval at which to retry sending the message.

   In the **and stop after _ attempts** box, enter the maximum number of delivery attempts.

Viewing message source

Oracle Outlook Connector offers the ability to view the complete source for your mail messages, including all Multipart Internet Mail Extensions (MIME) headers. This can be useful for investigating and diagnosing problems.

To view the source for a message:

1. Open the message.

2. From the **View** menu, select **Message Source**.

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Sharing information

Delegate access and permissions

Oracle Outlook Connector offers you the ability to open other users folders to view their e-mail, calendar, tasks, etc. as long as the other user has granted you the right to view the selected folder. You may not, however, open another user's Contacts folder.

The levels of delegate access offered by Oracle Outlook Connector are slightly different from those offered by Exchange.

To grant another user delegate access to one of your folders:

1. Right-click the folder in the Folder List and select **Properties**.

2. Click the **Permissions** tab, and select a person from the list box or click **Add** to choose a different user.

3. Select a role for that person from the drop-down list box.

   The available roles and permissions are different for mail folders (stored on the IMAP server) and other folders such as Calendar, Tasks, etc. (stored on the calendar server).

   - If you are setting permissions for your Calendar folder: **Reviewer** grants the selected user full viewing rights to Normal, Confidential and Personal items in this folder. **Editor** grants full viewing and modification rights to Normal, Confidential and Personal items in this folder. **None** completely blocks the selected user from seeing any items in this folder. You can also create a custom configuration for each user by selecting the desired radio buttons in the **Permissions** box. Clear the **Can invite me to meetings** check box to prevent the selected user from inviting you to meetings and events.

- If you are setting permissions for your Inbox or other mail folder, you will be able to grant other users access to create, read and delete messages, to mark messages as read, to administer the folder and to create subfolders.

To set delegate access to all your folders at once:

4. From the **Tools** menu, select **Options**.

5. Click the **Delegates** tab. For more details, see the Outlook online help.

Note that your permissions for other users' Inbox folders are a combination of your access rights on the IMAP server and the calendar server. For example, you can only send e-mail on behalf of another user if that user has granted you read and write permission in his or her Inbox. However, if you only have permissions to create and modify meetings on behalf of that user, you can still send e-mail notification of that new meeting to all attendees.

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Working Offline

Offline synchronization and capabilities

Oracle Outlook Connector allows you to work with your Inbox, Calendar and other folders offline, just like Outlook with Exchange. You can choose which folders you want to synchronize for use offline, and specify filters to select only a subset of items in those folders.

See the Outlook online help for details on those procedures.

For your convenience, Oracle Outlook Connector also offers additional menu selections for certain commands:

To work offline:

1. From the **File** menu, select **Work Offline**.

To select individual folders for offline use:

1. From the **Tools** menu, select **Synchronize**.

2. In the pop-up list, select **Make this Folder Available Offline**.

To select multiple folders for offline use:

1. From the **Tools** menu, select **Synchronize**.

2. From the pop-up list, select **Offline Folder Settings**.

3. Check the folders you want to make available offline. You may also right-click a folder to check or uncheck all subfolders contained within it.

Switching states

Oracle Outlook Connector offers you a convenient menu command to switch between online and offline states.

To go offline or online:

1. From the **File** menu, select **Work Offline**.

Note that going online and offline triggers the same behaviour you have set for starting up and shutting down Outlook. For details, see "Starting up and shutting down".

Starting up and shutting down

Starting Outlook

You can choose to have Outlook connect automatically to your mail and calendar servers, to start automatically in offline mode, or to give you the choice each time you start up.

To choose a start-up option:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Click **Oracle Outlook Connector** in the list and click **Properties**.

5. Go to the **Startup** tab.

If you want to be prompted for a connection mode each time you start up Outlook, check the **Choose a connection type** check box. If you want to connect automatically or work offline by default, clear the **Choose a connection type** check box and choose the appropriate radio button.

Shutting down

You can choose to have Outlook synchronize your offline folders automatically when you shut down, or prompt you whether to synchronize or not.

To choose a synchronization option:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Click **Oracle Outlook Connector** in the list and click **Properties**.

5. Go to the **Startup** tab, and click **Synchronize**.

6. To have Outlook synchronize all folders when you shut down, check the **When leaving an online session synchronize folders** check box. Then select the appropriate radio button to have Outlook synchronize automatically or ask you each time you shut down whether or not to synchronize. To never synchronize when you shut down Outlook, clear the **When leaving an online session synchronize folders** check box.

While Oracle Outlook Connector is synchronizing your offline folders, you may hit the **Skip** button to move on to the next folder or the **Cancel** button to close without further synchronization.

Automatic synchronization

You can choose an interval at which Outlook will synchronize your offline folders. This can reduce the amount of time Outlook takes to shut down.

To set the synchronization interval:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Click **Oracle Outlook Connector** in the list and click **Properties**.

5. Go to the **Startup** tab, and click **Synchronize**.

6. Check the **When online, automatically synchronize all offline folders** check box.

7. Enter a number of minutes in the box given.

Downloading the calendar server Address Book

In order to take advantage of the calendar server user and resource lists when working offline, you must download the Address Book to your offline storage file.

To download the calendar server Address Book:

1. From the **Tools** menu, select **Synchronize**.

2. In the pop-up list, select **Download Address Book**.

3. Use the radio buttons to choose whether to download all available information about each Address Book entry you download, or only the minimal necessary information.

4. Click **Address Book** to select which users and resources to download from the calendar server user and resource lists. Use the **Reset** button to remove all existing items from your offline Address Book.

Updating the calendar user and resource lists

You can update your offline calendar user and resource lists at any time with the most up-to-date information on the server.

1. Right-click the Calendar icon and select **Properties**.

2. On the **Administration** tab, click **Reset**.

Protecting your offline storage file

You can protect your offline storage files by setting a password.

To set a password for offline storage:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Click **Oracle Outlook Connector** in the list and click **Properties**.

5. Go to the **Startup** tab, and click **Offline Folders Settings**.

6. The **Password Protect** icon shows an unlocked combination lock if you have no password set, or a locked combination lock if you have a password set. Click the **Change** button to set a new password.

Click the **Save this password in your password list** check box to avoid having to provide your password each time you access your offline storage.

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PDA synchronization

Oracle Outlook Connector synchronizes with a variety of Personal Digital Assistants (PDAs) through third-party conduit software. For a list of the supported devices and software versions, please contact your system administrator or see the other Oracle Outlook Connector product documentation.

Pocket Mirror and Pocket Journal

If you use Pocket Mirror or Pocket Journal, you will need to configure Oracle Outlook Connector specifically.

To configure Oracle Outlook Connector for Pocket Mirror and Pocket Journal support:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Select **Oracle Outlook Connector** and click **Properties**.

5. On the **Other** tab, click **Third-Party Software**.

6. Select the **Pocket Mirror** or **Pocket Journal** checkboxes.

7

Coexisting with other Oracle Calendar clients

Ownership

Oracle's calendar server keeps a record of ownership, similar to Outlook's concept of organizers, for every item added to its database. You may not alter a meeting or event created by someone else, unless that user has granted you delegate access to his or her Calendar folder.

If you attempt to delete a meeting or event that you do not own, it will disappear from your Calendar folder, but will not be not removed from the server database. Instead, your attendee status will be set to Declined, and the meeting or event will remain in your Deleted Items folder.

If you attempt to move a Meeting or Event that you do not own by clicking and dragging it to a new time, the original version will remain in your Calendar as originally proposed. A copy, owned by you, will be created according to your new specifications, to which all original attendees will be invited. Outlook will prompt you with the following message:

```
You may want to let the Meeting organizer know you changed the Meeting "Title".
If the Meeting organizer sends an update for this Meeting, your changes will be
lost. Is this OK?
```

Since you are not modifying the original Meeting or Event, but rather creating a new one, your copy will not be deleted if the original organizer sends an update. Click **OK**.

Outlook will now prompt you with the following message:

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

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

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

Entry mapping

Outlook and Oracle's calendar server use different terms to refer to the available types of meetings and events. When Oracle Outlook Connector stores and retrieves meetings and events, it maps between these event types according to the following tables.

From client to server:

Outlook	Oracle calendar server
Meeting	Meeting
Appointment	Meeting (with no other people or resources invited)
All-Day Event	Day Event
Holiday	Day Event
Task	Task
Recurring Meeting, All-Day Event	Repeating Meeting, Day Event
Recurring Task	Unconnected (non-Recurring) Tasks

From server to client:

Oracle calendar server	Outlook
Meeting	Meeting
Day Event	All-Day Event (time shown as Busy)
Daily Note	All-Day Event (time shown as Busy)
Holiday	All-Day Event (time shown as Free)
Task	Task

Oracle calendar server	Outlook
Repeating Meeting, Day Event or Daily Note	Unconnected (non-Recurring) Meetings and All-Day Events

Importance level mapping

Outlook and Oracle's calendar server have different importance levels. When Oracle Outlook Connector stores and retrieves meetings and events, it maps between these importance levels according to the following tables.

From client to server:

Outlook	Oracle calendar server
High	High
Normal	Normal
Low	Low

From server to client:

Oracle calendar server	Outlook
Highest	High
High	High
Normal	Normal
Low	Low
Lowest	Low

Sensitivity / Access level mapping

Outlook's Sensitivity levels are slightly different from Oracle's calendar server access levels. When Oracle Outlook Connector stores and retrieves meetings and events, it maps between sensitivity and access levels according to the following tables.

From client to server:

Outlook	Oracle calendar server
Normal	Normal
Private	Personal
Personal	Personal
Confidential	Confidential

From server to client:

Oracle calendar server	Outlook
Public	Normal
Normal	Normal
Personal	Private
Confidential	Personal

Deleted Items

Whenever you delete or decline a calendar entry, whether from your Inbox or Calendar folder, that entry is moved to your Deleted Items folder. Other Oracle calendar clients will display your response to these meetings as "Refused".

> **Warning:** If you remove a meeting or event that you own from your Deleted Items folder, it will be deleted entirely from the calendar server database. The schedules of all attendees will be updated with the deletion.

8

Configuration

This section describes how to set up connections to the various servers that Oracle Outlook Connector uses to provide mail and calendaring. You may omit your password from any of these dialogs to have Outlook prompt you at startup.

You may also skip any connections you wish by choosing **I do not yet have a _ account**.

Creating a new profile with Oracle Outlook Connector

When you create a new profile using the Oracle Outlook Connector service, you will need to provide the setup wizard with a variety of information for connecting to your mail and calendar servers.

- On the first screen of the Oracle Outlook Connector setup wizard, choose the **Corporate** radio button to connect to your organization's calendar server over a LAN or VPN connection. Choose the **ASP** radio button if your calendar and mail services are provided by a third-party reseller. Choose the **I do not yet have an Oracle Calendar account** radio button to skip configuring your calendar server connection and move on to your e-mail server connections. Click the **Next** button to proceed.

- If you chose the **Corporate** radio button, you will have to provide the network name or address of your server, followed by a comma, followed by the node-ID or alias of your calendar server node, in the **Server name** box. Specify the user name and password of your calendar account in the other boxes of this screen. Click the **Next** button to proceed.

- If you chose the **ASP** radio button, you will have to provide the Domain ID used by your service provider to identify your company, as well as the host name or names of your provider's calendar domain service hosts. Your service provider contact should be able to provide you with this information. Enter the

user name and password for your calendar account in the other boxes on this screen. Click the **Next** button to proceed.

- Configure your IMAP4 server connection for incoming mail. If you do not have an account or wish to skip this step, check the **I do not yet have an IMAP4 account** check box. Otherwise, enter the host name of your IMAP4 server in the **Server name** box. You can check the **Use same settings as my Oracle Calendar Server** check box if your mail and calendar accounts have the same user name and password. Click the **Next** button to proceed.

- If you did not check the **Use same settings as my Oracle Calendar Server** check box, you will have to enter the user name and password for your incoming e-mail account. Click the **Next** button to proceed.

- Configure your SMTP server connection for outgoing mail. If you do not have an account or wish to skip this step, check the **I do not yet have an SMTP account** check box. Otherwise, enter the host name of your SMTP server in the **Server name** box. If your outgoing e-mail server requires a user name and password, check the **The server requires authentication** check box. You can check the **Use same settings as my IMAP4 server** check box if your outgoing and incoming e-mail accounts have the same user name and password. Click the **Next** button to proceed.

- If you specified that your SMTP server requires authentication and not to use the same settings as your IMAP4 server, you will have to provide the user name and password for your SMTP server. Click the **Next** button to proceed.

- Enter the name and e-mail address that you wish to be displayed for your outgoing e-mail. Click the **Next** button to proceed.

- If you wish to enable the offline capabilities of Oracle Outlook Connector, check the **I will use this computer while not connected to the network** check box. Check the **Choose a connection type next time you log on using this profile** check box to select at startup whether you want Outlook to connect to your mail and calendar servers or to work offline. Click the **Next** button to proceed.

- Confirm that all the information you have entered is correct, and click the **Next** button to proceed.

- Specify the location of your personal folder file, or choose a new location if you do not yet have a personal folders file. Click the **Next** button to proceed, and click the **Finish** button to complete your Oracle Outlook Connector setup.

When adding Oracle Outlook Connector to an existing profile, the setup wizard is not available. Instead, you will enter the same information directly in the Oracle

Outlook Connector configuration dialog box. See the following help topics for details.

Connecting to the calendar server

The calendar server provides Oracle Outlook Connector with your calendar, tasks, contacts, journal and notes.

To configure a calendar server connection:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Select **Oracle Outlook Connector** and click **Properties**.

5. On the **Calendar** tab, fill out the fields provided.

   - You can select the **I do not yet have an Oracle Calendar account** check box to use Oracle Outlook Connector for mail only.

   - You can specify your calendar server using either a Calendar Domain Service host name and Domain ID (for installations using a third-party service provider) or a host name and Node-ID (for corporate installations). Consult your system administrator for the necessary information.

     To use the third-party service provider sign-in mode, click the **This server Requires a Domain Service** checkbox. Click **Settings** to specify a Domain ID and a list of Calendar Domain Service hosts.

     Clear the **This server Requires a Domain Service** checkbox to use the corporate sign-in mode. Specify your server host name and node-ID, separated by a comma, in the **Server name** box.

   - Click the **Save this password in your password list** check box to avoid having to provide your calendar server password each time you connect.

   - The **Advanced** button provides the ability to specify a port for your calendar server if required, and your preferred display format for the names of other calendar server users. For details, see "Choosing a name format".

Connecting to the IMAP mail server

The IMAP server receives and stores your incoming mail.

To configure an IMAP server connection:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Select **Oracle Outlook Connector** and click **Properties**.

5. On the **IMAP4** tab, fill out the fields provided.

   - You can select the **I do not yet have an IMAP4 account** check box to use Oracle Outlook Connector without the ability to access incoming mail.

   - Specify the IMAP server name in the **Server Name** box.

   - Specify your account name and password in the fields provided. Click the **Use same settings as my Oracle Calendar Server** check box to use the same user name and password you provided for your calendar server. Click the **Save this password in your password list** button to avoid having to provide the password each time you connect.

   - Click **Advanced** to provide a port number for the IMAP server or specify a Secure Sockets Layer (SSL) connection.

     If Transport Layer Security (TLS) is set up on your IMAP server, Oracle Outlook Connector will take advantage of it automatically unless you specify an SSL connection. If you do, Oracle Outlook Connector will use SSL instead of TLS.

Connecting to the SMTP mail server

The SMTP server sends your outgoing mail.

To configure an SMTP server connection:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Select **Oracle Outlook Connector** and click **Properties**.

5. On the **SMTP** tab, fill out the fields provided.

   - You can select the **I do not yet have an SMTP account** check box to use Oracle Outlook Connector without the ability to send outgoing mail.

   - Specify the SMTP server name in the **Server Name** box.

   - If your SMTP server requires a user name and password, click the **The server requires authentication** check box. Click **Settings** to specify your user name and password. You can click the **Use same settings as my incoming mail server** check box to automatically use the same account name and password you provided for your IMAP server. Click the **Save this password in your password list** button to avoid having to provide the password each time you connect.

   - Enter your display name and e-mail address. You may also specify an organization and reply-to addresses you would like to include in your outgoing mail. These two fields are optional, and will not be prompted for if left blank.

   - Click **Advanced** to provide a port number for the SMTP server, specify a Secure Sockets Layer (SSL) connection, and configure how often the SMTP server will automatically attempt to resend undelivered messages for you.

     If Transport Layer Security (TLS) is set up on your SMTP server, Oracle Outlook Connector will take advantage of it automatically unless you specify an SSL connection. If you do, Oracle Outlook Connector will use SSL instead of TLS.

Using POP instead of IMAP

You can configure Oracle Outlook Connector to use a POP mail server instead of IMAP using Microsoft's Internet E-mail service provider. For more on the difference between POP and IMAP, see "IMAP vs. POP".

For instructions on setting up Microsoft's Internet E-mail service provider, see http://support.microsoft.com/support/kb/articles/q195/5/00.asp.

The following limitations apply when using Oracle Outlook Connector with POP mail instead of IMAP:

- Your mail items will be stored in your offline folders.

- You will not be able to share or subscribe to server-based mail folders, or use delegate rights for mail folders.

■ You will not be able to view public folders.

Making Oracle Outlook Connector your default service provider

Oracle Outlook Connector works best when it is installed as your default service provider for mail.

To make Oracle Outlook Connector your default mail provider:

1. From the **Tools** menu, select **Services**.

2. Select the **Delivery** tab.

3. In the **Deliver new mail to the following location** list, click **Oracle Connector -<your user name>**.

Setting the server refresh interval

You can specify a time interval at which Oracle Outlook Connector will automatically query the mail and calendar servers for new and modified items.

To set the refresh interval:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Select **Oracle Outlook Connector** and click **Properties**.

5. On the **Other** tab, enter the desired refresh interval in minutes in the **Check for new entries every** field.

Note that your mail and calendar servers may have settings that will override the value you specify here.

Configuring Add-ins

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

also make sure to remove Add-ins specific to Microsoft Exchange when running Oracle Outlook Connector.

To configure Oracle Outlook Connector Add-Ins:

1. From the **Tools** menu, select **Options**.

2. On the **Other** tab, click **Advanced Options**.

3. Click **Add-In Manager**.

4. Clear the **Exchange Extensions property pages** check box in the list.

5. Make sure the **Oracle Connector** check box is selected, as well as any other Add-ins you want to install.

If the Oracle Connector Add-In is not listed, you must install it.

To install the Oracle Connector Add-in:

1. In the Add-in Manager, click **Install**.

2. In the **Install Extension** dialog box, click the file `cstms.ecf`. If this file is not present, you may have to re-install Oracle Outlook Connector.

3. In the Add-In Manager list box, ensure that **Oracle Connector** is available in the list and that its check box is selected.

To configure COM Add-Ins (Outlook 2000 only):

1. From the **Tools** menu, select **Options**.

2. On the **Other** tab, click **Advanced Options**.

3. Click **COM Add-ins**.

4. Select all available Oracle Connector check boxes.

Configuring offline support

You can configure Oracle Outlook Connector to download specified mail and calendar folders to your hard drive so you can work with them when you are not connected to the mail and calendar servers.

To configure offline support:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Select **Oracle Outlook Connector** and click **Properties**.

5. On the **Startup** tab, click the **Enable offline use** check box.

   - Select whether you prefer to connect to the network automatically on startup, work offline automatically, or be prompted for your choice.

   - Click the **Synchronize** button to set whether you want Outlook to synchronize your folders automatically when you sign out, and to set an automatic refresh interval at which Outlook will automatically synchronize your offline folders while you are online.

   - Click the **Offline Folders Settings** button to specify a path for your offline information, assign a password and encryption if desired, and optimize your offline folders by compacting or purging messages.

Selecting folders for automatic refresh

Oracle Outlook Connector automatically refreshes the contents of your folders periodically as you work. You can choose which folders to include in these automatic refreshes.

To select folders for automatic refresh:

1. Click the **Tools** menu, select **Options**.

2. On the **Oracle Connector** tab, click **Calendar Preferences**.

3. In the **Include these folders during idle refreshes** box, check the folders you wish to refresh automatically.

Setting a time range for other users' Calendar folders

In order to speed up opening other users' Calendar folders, you can specify a time range for the information you will see.

To set a time range for other users' Calendar folders:

1. Click the **Tools** menu, select **Options**.

2. On the **Oracle Connector** tab, click **Calendar Preferences**.

3. In the **When opening other users' calendars show data** box at the bottom of the dialog, set the start and end points for the time range desired.

The calendar server user and resource lists

Oracle's calendar server provides an Address Book listing all calendar users and resources available for booking and mail delivery. You can access these lists the same way as any other Outlook Address Book, but you may not modify the lists themselves.

If the calendar server user and resource lists are very large, you may choose to disable them, and not load them into your Outlook client.

To enable or disable the calendar server user and resource lists:

1. Click the **Tools** menu, select **Options**.

2. On the **Oracle Connector** tab, click **Calendar Preferences**.

3. Check or clear the **Load Oracle Calendar address lists when working online** check box.

You will have to close and re-open Outlook for your change to take effect.

Displaying an icon for unavailable servers

You can choose to have Outlook display a small information icon in the lower right corner of the window when a server is unavailable or a connection is skipped.

To display the unavailable servers icon:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Select **Oracle Outlook Connector** and click **Properties**.

5. On the **Other** tab, check the **Display icon when a server is not configured** check box.

Slow network connections

To optimize performance when using a slow network connection, you can choose to automatically disable certain features of Oracle Outlook Connector including automatic folder refreshes and synchronization and client-side e-mail rules when operating below a specified network speed.

To automatically detect slow connections:

1. Close Outlook.

2. Click the Windows **Start** button, and select **Settings**.

3. Select **Control Panel** from the pop-up list, and double-click the **Mail** icon.

4. Select **Oracle Outlook Connector** and click **Properties**.

5. On the **Other** tab, check the **Check for slow or latent network conditions** check box.

6. Use the slider to set the network speed threshold below which to disable automatic refreshes and other network-intensive operations. Move the slider to the **Low** end of the range to set the threshold at higher network speeds. Move the slider to the **High** end of the range to set the threshold at much lower network speeds.

7. Select the **Prompt** radio button to have Outlook ask for confirmation before disabling network-intensive features. Select the **Automatically** radio button to have Outlook disable network-intensive features without a prompt.

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Maintenance

Resetting folder contents

You can reset your folders at any time with the current contents of the mail server, getting the most up-to-date information for your offline use. Unlike synchronizing your offline folders, which verifies and compares online and offline information, this command simply overwrites your local copies with information from the server.

To reset the contents of all folders:

1. From the **Tools** menu, select **IMAP4 Folders**.

2. In the pop-up list, select **Reset Folder List**.

To reset individual folders:

1. Right-click the folder you want to reset, and select **Properties**.

2. On the **Administration** tab, click **Reset**.

Compacting offline folders

You can compact your folders to reduce the amount of space they take up and reclaim your hard disk.

To compact folders:

1. From the **Tools** menu, select **Compact**.

2. In the pop-up list, select **This Folder** to compact only the current folder, or **All Folders** to compact all offline folders.

Installing the Oracle Calendar Appointment Form

The Oracle Calendar Appointment Form provides real-time Attendee Availability and Attendee Status for meetings and events in your Calendar folder. If you do not see "Unconfirmed" listed along with "Busy", "Out of Office" and "No Information" below the Attendee Availability timeline for a meeting, you may need to re-install your Oracle Calendar Appointment form.

To verify that the Appointment form is installed:

1. Right-click the Calendar folder.

2. Click **Properties**, and then select the **Forms** tab.

3. If **Oracle Calendar Appointment** is not listed in the box labeled **Forms associated with this folder**, you must install it.

To install the form automatically:

1. Right-click the Calendar folder and click **Properties**.

2. On the **Forms** tab, click **Manage**.

3. Select the **Publish Form automatically when folder is first opened** check box.

To install the form manually:

1. Right-click the Calendar folder and click **Properties**.

2. On the **Forms** tab, click **Manage**.

3. Next to **Oracle Calendar Appointment Form**, click **Install**.

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Why Can't I...

Where did my Contact's attachment go?

Although attachments can be added normally to a contact, Oracle Outlook Connector does not currently support the ability to save attachments for contacts.

Why can't I AutoPreview my messages?

When AutoPreview is selected, Outlook opens local copies of all messages within the current folder, and displays the first three lines of each message. However, Oracle Outlook Connector only downloads the headers of your messages from the IMAP server, leaving the full text stored on the server. No local copies of your messages exist for Outlook to open, therefore AutoPreview cannot be supported.

Oracle Outlook Connector does support the Preview Pane normally.

Why can't I see Category headers?

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

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

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

Why can't I customize my current view?

The current view can be customized in any way permitted by the **View Summary** dialog box (**View**, **Current View**, **Customize Current View**). The sole exception is that no Group By features are implemented in this release of Oracle Outlook Connector.

If you attempt to change the settings in the **Group By** dialog box, your folder will appear empty when you click the **OK** button in the **View Summary** dialog box.

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

Why can't I detect and repair a folder?

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

Why can't I use Mail Merge?

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

Why can't I set reminders on my messages?

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

Why can't I change a meeting into an all day event?

The ability to change a meeting into an all day event and an all day event into a meeting is not supported in this release of Oracle Outlook Connector.

Why can't I recall a message?

Message Recall relies on Microsoft Exchange Server; it is therefore unavailable when using Oracle Outlook Connector.

Why can't I create a new folder?

New folders you create in your Oracle Outlook Connector profile or in a public folder on the e-mail server may only contain mail items. Ensure that the **Folder contains:** field of the **Create New Folder** dialog box is set to **Mail Items** before clicking **OK**.

Personal folders you create locally on your machine may contain any kind of items.

Depending on the setup of your mail server, you may only be allowed to create mail folders in certain places (inside the Inbox, for example).

If none of these are the cause, it may be that your folder name contains special characters that the IMAP server will not allow.

Why can't I view attendee availability and response?

If you cannot view attendee availability or attendee response (for Meetings and Events that you have created), it is possible that the Oracle Calendar Appointment Form is not correctly installed.

For more information, see "Installing the Oracle Calendar Appointment Form".

Why can't I attach an OLE object?

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

Why can't I receive delivery receipts?

Oracle Outlook Connector will process your requests for delivery receipts normally. However, these requests may or may not be honoured by the SMTP e-mail delivery server that handles your messages on the way to their destinations.

Some mail servers cannot process delivery receipts. Others with virus checking software installed may consider the code for your request to be a potential virus hazard, and delete it.

If you are not receiving delivery receipts, consult your system administrator.

Why can't I recover deleted items?

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

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

The **File** menu command **Send Link to This Folder** is currently unavailable with Oracle Outlook Connector.

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

The ability to set formatting, voting buttons and delivery options using the **Send Options** dialog box is not fully supported by Oracle Outlook Connector.

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