Sun Java™ System

Connector for Microsoft Outlook 7 User's Guide

2005Q1

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Contents

List of Figures **7**

Preface **9**

Who Should Use This Book 9
Before You Read This Book 9
How This Book Is Organized 10
Conventions Used in This Book 10
Typographic Conventions 10
Symbols 11
Related Documentation 12
Books in This Documentation Set 12
Other Server Documentation 13
Accessing Sun Resources Online 13
Contacting Sun Technical Support 13
Related Third-Party Web Site References 14
Sun Welcomes Your Comments 14

Chapter 1 Sun Java System Connector for Microsoft Outlook Overview **15**
What is Sun Java System Connector for Microsoft Outlook? 15
Where to Find Other Information 16

Chapter 2 Installing and Configuring the Software on Your Desktop **17**
About the Setup Procedure 17
System Requirements 18
Profiles that May Be Converted 18
Folder Hierarchies for Migrated Data 18
If a Large PST File Conversion Is Interrupted 19
The Setup Procedure 19
Step 1: Start the Setup Wizard 19
Step 2: Install Microsoft Web Publishing Wizard 21

Step 3: Select an Outlook User Profile to Convert 22
Step 4: Select Personal Folders (.pst) Files to Convert 23
Step 5: Enter Exchange Account Login Information 25
Step 6: Enter New Sun Java System Account Login Information 26
Step 7: Enter Password(s) for Protected Personal Folders (.pst) Files 27
Step 8: Progress Meter(s) 28
Step 9: Exit 30

Chapter 3 Getting Started 33
Starting Outlook 33
Appearance 34
Typical Initial Profile 34
Accessing Your Inbox 34
Accessing Your Calendar 35
Accessing Your Contacts 35

Chapter 4 Configuring Connector for Microsoft Outlook 37
Configuring Servers and User Accounts 37
Configuring Mail Properties 39
Configuring Calendar Properties 40
Configuring Address Book Properties 41
Configuring Store and Logging Properties 41

Chapter 5 Working with Email Folders 43
Accessing Your Inbox 43
Shared Folders 44
Delegating Access to a Mail Folder 45
Working Offline 45
Setting the Offline and Online Mode 45
Selecting a Folder for Offline Use 46
Changing the Folder Class 46

Chapter 6 Working with Calendar Folders 49
Accessing Your Calendar 49
Shared Calendars 49
Delegating Access to a Calendar 51

Chapter 7 Troubleshooting 53
If Microsoft Outlook Is Not Your Default E-mail Client 53
If a Sun Synchronization Program Is Installed, and Must Be Removed 53
If a Personal Folder (.pst) File Conversion Is Interrupted 54

Logging 56
Enabling Logging for Troubleshooting 56
Sending a Log Report 56
Increasing Log Files and Size 57
Assigning Tasks 57
If a Server is Down 58

Glossary 59

Index 61

List of Figures

Figure 2-1 Folder Hierarchies for Migrated Data 19
Figure 2-2 Setup Wizard: Welcome Screen 20
Figure 2-3 Setup Wizard: Checking for Minimum Installation Requirements 21
Figure 2-4 Setup Wizard: Select Outlook User Profile to Convert 22
Figure 2-5 Setup Wizard: Select Personal Folders (`.pst`) Files to Convert 24
Figure 2-6 Setup Wizard: Enter Microsoft Exchange Mailbox Information 26
Figure 2-7 Setup Wizard: Enter Your Sun Java System User Information 26
Figure 2-8 Setup Wizard: Enter Personal Folders (`.pst`) File Password 28
Figure 2-9 Setup Wizard: Converting User Profile (Progress Meter) 29
Figure 2-10 Setup Wizard: Finishing PST as a Background Process 29
Figure 2-11 Setup Wizard: Completing the Setup 30
Figure 2-12 Setup Wizard: Setup Failed 31
Figure 7-1 To Finish an Aborted Conversion: The Desktop “Finish” Icon 55
Figure 7-2 Setup Wizard Welcome Screen, to Resume an Interrupted Conversion 55

Preface

This *User's Guide* explains how to use the Setup Wizard to install and configure the Sun Java™ System Connector for Microsoft Outlook on your desktop. This guide also describes how to use the Connector for Microsoft Outlook through the user interface.

The Sun Java System Connector for Microsoft Outlook will let you and your co-workers use Microsoft Outlook as your e-mail and calendar application while connected to Sun Java System servers. The Connector software performs necessary ongoing communications between Outlook and the Sun Java System server, so that you will have access to your new mailbox and full use of your calendar, address book, and other Outlook features.

Who Should Use This Book

You should read this book if you plan to install and use Sun Java System Connector for Microsoft Outlook on your desktop.

Before You Read This Book

This book assumes that you are responsible for installing the Connector for Microsoft Outlook software on your desktop and that you have a general understanding of the following:

- The Internet and the World Wide Web
- Installing software on the following platforms:
  - Microsoft Windows 2000
  - Microsoft Windows XP
- Microsoft Outlook

How This Book Is Organized

The following table summarizes the content of this book.

Table 1 How This Book Is Organized

Chapter	Description
Chapter 1, “Sun Java System Connector for Microsoft Outlook Overview”	Provides an overview of Connector for Microsoft Outlook.
Chapter 2, “Installing and Configuring the Software on Your Desktop”	Describes how to install Connector for Microsoft Outlook on your desktop.
Chapter 3, “Getting Started”	Describes how to get started using Connector for Microsoft Outlook.
Chapter 4, “Configuring Connector for Microsoft Outlook”	Describes how to set up Outlook properties to work with Sun Java System servers.
Chapter 5, “Working with Email Folders”	Describes how to work with email folders.
Chapter 6, “Working with Calendar Folders”	Describes how to work with calendar folders.
Chapter 7, “Troubleshooting”	Provides troubleshooting and tips when using Connector for Microsoft Outlook.

Conventions Used in This Book

The tables in this section describe the conventions used in this book.

Typographic Conventions

The following table describes the typographic changes used in this book.

Table 2 Typographic Conventions

Typeface	Meaning	Examples
AaBbCc123 (Monospace)	Any text that appears on the computer screen or text that you should type. Can be API and language elements, HTML tags, web site URLs, command names, file names, directory path names, onscreen computer output, sample code.	Edit your `.login` file. Use `ls -a` to list all files. `% You have mail.`
AaBbCc123 (Monospace bold)	Text that you should type when it appears within a code example or other onscreen computer output.	`% su` `Password:`
AaBbCc123 (Italic)	A placeholder in a command or path name that you should replace with a real name or value (for example, a variable). Also can be a book title, new term, or word to be emphasized.	The file is located in the *install-dir*`/bin` directory. Read Chapter 6 in the *User's Guide*. These are called *class* options. Do *not* save the file.

Symbols

The following table describes the symbol conventions used in this book.

Table 3 Symbol Conventions

Symbol	Description	Example	Meaning
`[ ]`	Contains optional command options.	`ls [-l]`	The `-l` option is not required.
`{ | }`	Contains a set of choices for a required command option.	`-d {y|n}`	The `-d` option requires that you use either the `y` argument or the `n` argument.
-	Joins simultaneous multiple keystrokes.	Control-A	Press the Control key while you press the A key.
+	Joins consecutive multiple keystrokes.	Ctrl+A+N	Press the Control key, release it, and then press the subsequent keys.

Table 3 Symbol Conventions *(Continued)*

Symbol	Description	Example	Meaning
>	Indicates menu item selection in a graphical user interface.	File > New > Templates	From the File menu, choose New. From the New submenu, choose Templates.

Related Documentation

The http://docs.sun.com[SM] web site enables you to access Sun technical documentation online. You can browse the archive or search for a specific book title or subject.

Books in This Documentation Set

The following table summarizes the books included in the Connector for Microsoft Outlook core documentation set.

Table 4 Books in This Documentation Set

Book Title	Description
Connector for Microsoft Outlook Deployment Planning Guide (http://docs.sun.com/doc/819-0028)	Describes the administrator's process and strategies for deploying Connector for Microsoft Outlook to user desktops.
Connector for Microsoft Outlook Installation Guide (http://docs.sun.com/doc/819-0029)	Describes how to install the administration software that helps an administrator deploy Connector for Microsoft Outlook to user desktops.
Connector for Microsoft Outlook Administration Guide (http://docs.sun.com/doc/819-0027)	Describes the administrator's deployment configuration program for the Connector for Microsoft Outlook.
Connector for Microsoft Outlook User's Guide (http://docs.sun.com/doc/819-0030)	(This guide) Explains how to install, use and configure the Connector for Microsoft Outlook on your desktop. This guide also describes the user interface.
Connector for Microsoft Outlook Release Notes (http://docs.sun.com/doc/819-0031)	Contains last-minute information, including a description of what is new in this current release, known problems and limitations, installation notes, and how to report issues with the software or the documentation.

Other Server Documentation

For other server documentation, go to the following:

- Messaging Server documentation
  http://docs.sun.com/coll/MessagingServer_05q1
- Calendar Server documentation
  http://docs.sun.com/coll/CalendarServer_05q1

Accessing Sun Resources Online

For product downloads, professional services, patches and support, and additional developer information, go to the following:

- Download Center
  http://wwws.sun.com/software/download/
- Professional Services
  http://www.sun.com/service/sunps/sunone/index.html
- Sun Enterprise Services, Solaris Patches, and Support
  http://sunsolve.sun.com/
- Developer Information
  http://developers.sun.com/prodtech/index.html

Contacting Sun Technical Support

If you have technical questions about this product that are not answered in the product documentation, go to http://www.sun.com/service/contacting.

Related Third-Party Web Site References

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Chapter 1

Sun Java System Connector for Microsoft Outlook Overview

Sun Java System Connector for Microsoft Outlook enables Sun Java System Messaging Server and Sun Java System Calendar Server features and functionality to be available through Microsoft Outlook.

The following topics are discussed in this section:

- What is Sun Java System Connector for Microsoft Outlook?
- Where to Find Other Information

What is Sun Java System Connector for Microsoft Outlook?

Sun Java System Connector for Microsoft Outlook enables Outlook to be used as a desktop client with Sun Java Enterprise System.

Connector for Microsoft Outlook is an Outlook plug-in that must be installed on the end-user's desktop. Connector for Microsoft Outlook queries the Sun Java System Messaging Server for folder hierarchies and email messages. It converts the information into Messaging API (MAPI) properties that Outlook can display. Similarly, it uses WCAP to query the Sun Java System Calendar Server for events and tasks which are then converted into MAPI properties. With this model, Sun Java System Connector for Microsoft Outlook builds an end-user Outlook view from two separate information sources: mail from Messaging Server and calendar information from Calendar Server.

When users create and modify items through Outlook, Connector for Microsoft Outlook passes the new message along to the appropriate server depending on its message type. It sends new outgoing e-mail to an SMTP mail server for delivery, and sends modified e-mail messages back to the user's IMAP folder for storage. New calendar events and tasks are converted into a standard format to be stored in the Calendar Server database.

Sun Java System Connector for Microsoft Outlook 7 2005Q1 includes support for address book service. This allows a user to have their personal address book accessible from both Outlook and Sun Java System Communications Express.

Where to Find Other Information

The Sun Java System Connector for Microsoft Outlook documentation can be found at http://docs.sun.com as part of the Calendar Server documentation collection (http://docs.sun.com/coll/CalendarServer_05q1) or Messaging Server documentation collection (http://docs.sun.com/coll/MessagingServer_05q1).

- *Sun Java System Connector for Microsoft Outlook Release Notes*—describes features, known limitations and problems, system requirements, and other important information about this release of Sun Java System Connector for Microsoft Outlook.
- *Sun Java System Connector for Microsoft Outlook Installation Guide*—describes how to install the administration software that helps an administrator deploy Connector for Microsoft Outlook to user desktops.
- *Sun Java System Connector for Microsoft Outlook Deployment Planning Guide*—describes the administrator's process and strategies for deploying Connector for Microsoft Outlook to user desktops.
- *Sun Java System Connector for Microsoft Outlook Administration Guide*—describes the Desktop Deployment Configuration Program, which allows the administrator to create custom end-user installation packages that configures and customizes the software per the administrator's specifications.
- *Sun Java System Connector for Microsoft Outlook User's Guide*—describes how to use the Setup Wizard to install and configure Sun Java System Connector for Microsoft Outlook on a user's desktop. Also describes the user interface for Connector for Microsoft Outlook.

Chapter 2

Installing and Configuring the Software on Your Desktop

The Sun Java System Connector for Microsoft Outlook software must be installed and configured on every user's desktop, but after it's installed it will become virtually invisible to you. It will operate automatically, in the background, and will require no maintenance whatsoever.

The system administrator of your network has prepared a special installation package for you, called the Setup Wizard, to install and configure the Sun Java System Connector for Microsoft Outlook on your desktop. These installation packages are designed to simplify and automate the installation process, to spare you much of the time and hassle of having to enter technical information and make technical choices by yourself. Your Setup Wizard also contains a conversion program that can automatically convert any existing Outlook data stored on your desktop — your old messages, address books, contacts, calendar data and so forth — to the new format that the Connector for Microsoft Outlook software can use.

About the Setup Procedure

The procedure to install the Sun Java System Connector for Microsoft Outlook on your desktop may follow any of several different paths, depending on your current system setup, the volume of data (if any) that you want to convert from the old Outlook format to the new format, and other factors. This *Guide* explains all of the screen displays that *may* appear to various users, but it's a rare case that any single user would see them all, and the ones that don't apply to you will be skipped.

System Requirements

The Sun Java System Connector for Microsoft Outlook requires:

- Operating System: Windows 2000 (Service Pack 3 or higher) or Windows XP (Service Pack 1 or higher). The Setup Wizard will not start under any other operating system.
- Your default email client must be one of these versions of Microsoft Outlook:
  - Outlook 2003
  - Outlook 2002 with Office XP Service Pack 2 or higher
  - Outlook 2000 in Corporate Mode (*not* in Internet Mode), with Office 2000 Service Pack 3 or higher.

Profiles that May Be Converted

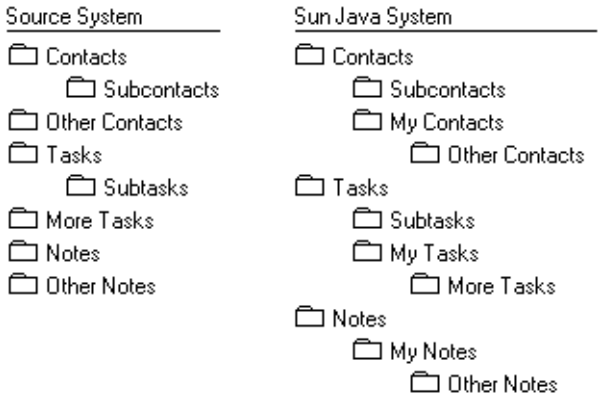
The Setup Wizard can convert the following profile types to Outlook profiles that work with the new Sun Java System Connector:

- Exchange profiles, and POP profiles;
- IMAP profiles from Outlook 2002 / XP and Outlook 2003 (but *not* from Outlook 2000, where IMAP profiles cannot exist in Corporate Mode).
- Sun Java System Connector version 6.0 profiles from Outlook 2000 and Outlook 2002 / XP (but *not* from Outlook 2003) can be upgraded to version 7.0.

Folder Hierarchies for Migrated Data

The Sun server supports only one top-level folder within Outlook for each type of data — Contacts, Notes, Calendar, Tasks or Journal. If the source folder hierarchy contains more than one top-level folder for any one data type (as shown in Figure 2-1 below), only the primary (first-listed) folder appears in the top level after the migration. The other folders of the same data type are migrated to a new second-level folder named *My [DataType]*, also shown in Figure 2-1.

Figure 2-1 Folder Hierarchies for Migrated Data



If a Large PST File Conversion Is Interrupted

If the conversion of a large file is interrupted before its completion (by a power failure, for example), the Setup Wizard offers a Recovery feature that lets you complete a conversion in progress rather than having to start over from scratch. If this should happen to you, please see "If a Personal Folder (.pst) File Conversion Is Interrupted" in Chapter 7.

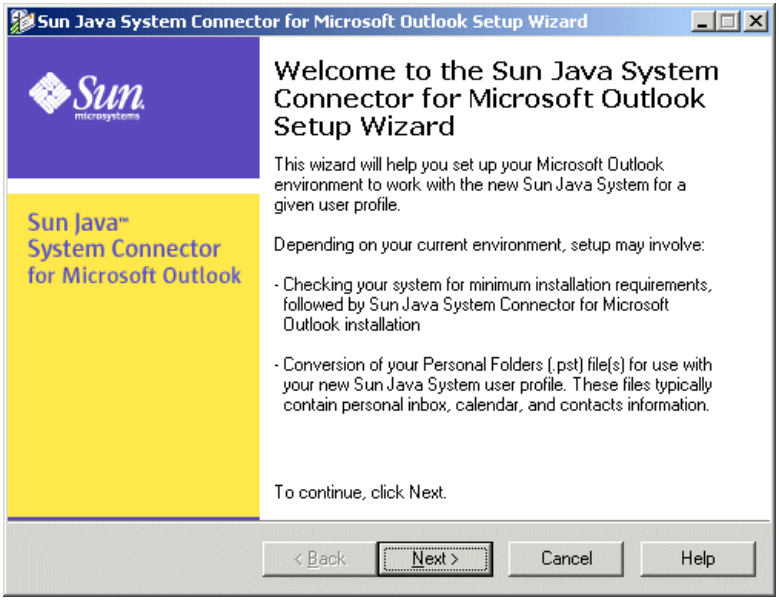
The Setup Procedure

This section describes the steps to follow in order to install and configure Sun Java System Connector for Microsoft Outlook on your desktop.

Step 1: Start the Setup Wizard

Your network administrator will tell you how to start your Sun Java System Connector for Microsoft Outlook Setup Wizard—most likely by finding the program name through your Start button, or by an icon on your desktop, or by browsing to a particular location in your network. But no matter how you start the Setup Wizard, the procedure begins with the display of the Welcome screen shown in Figure 2-2.

Figure 2-2 Setup Wizard: Welcome Screen



1. Read the Welcome message, and click the Next button.

   The Setup Wizard then examines your system to verify that:

   - Microsoft Outlook is designated as your default email client, and your version of Outlook is supported by this Connector software; and
   - the Sun Java System Synchronization program (previously known as the Sun ONE Sync program) — which is incompatible with this Connector software — is *not* installed.

   If Outlook is not set as your default email client, or if an incompatible Sun synchronization program *is* installed, the Wizard notifies you and prompts you to acknowledge the notice and exit the program. (You will be able to run this Setup Wizard again after you correct the problem.) To resolve either of these problems, see the instructions in Chapter 7 of this *Guide*, under:

   - "If Microsoft Outlook Is Not Your Default E-mail Client"
   - "If a Sun Synchronization Program Is Installed, and Must Be Removed"

   Similarly, if your version of Outlook is not supported, the Wizard notifies you of the problem and prompts you to exit the program, and you may rerun the Setup Wizard after you upgrade to a supported version of Outlook.

Otherwise, if a supported version of Outlook *is* set to be your default email client, and if no Sun synchronization program is installed: The Setup Wizard copies the necessary files to your computer, and examines your system to see whether the Microsoft Web Publishing Wizard (WPW) is installed. The WPW is a component that lets you share your free / busy schedule with coworkers.

2. Depending on whether Microsoft Web Publishing Wizard is already installed

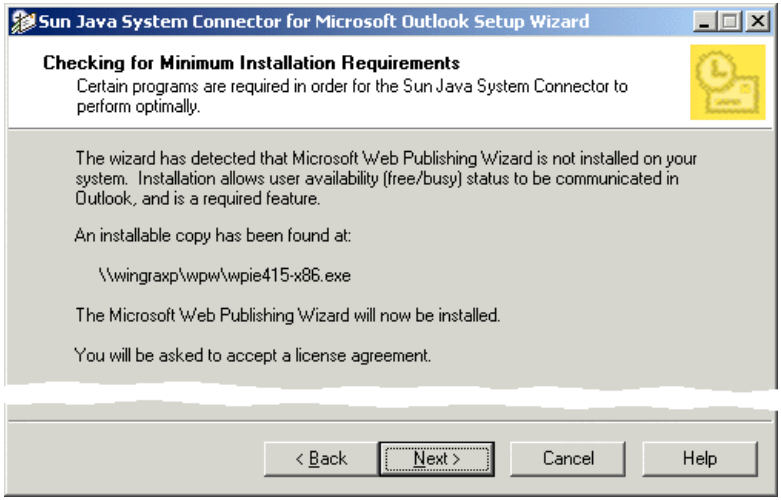
   - ***If WPW is already installed:*** The Wizard moves on to the next phase of this installation and setup process. Skip ahead to Step 3: Select an Outlook User Profile to Convert.
   - ***If WPW is not installed:*** The Setup Wizard prompts you to install it now. Go on to Step 2: Install Microsoft Web Publishing Wizard.

Step 2: Install Microsoft Web Publishing Wizard

This screen will not appear (and you may skip this step) if the Setup Wizard finds the Microsoft Web Publishing Wizard (WPW) already installed on your computer. If, however, WPW is not installed on your computer, you should install it now.

Your system administrator has previously specified the file name and location (path) of an installable copy of WPW in your network, and the Setup Wizard displays that information here, as shown in Figure 2-3. To install WPW:

Figure 2-3 Setup Wizard: Checking for Minimum Installation Requirements



1. Click Next.

   The Setup Wizard then displays the WPW License Agreement for you to read and accept or decline.

2. Read the entire License Agreement, and click either Yes or No to indicate whether you accept or decline its terms.

If you answer Yes: The installation kit installs WPW on your computer, and the Setup Wizard moves on to the next phase of the installation process. Go on to Step 3: Select an Outlook User Profile to Convert.

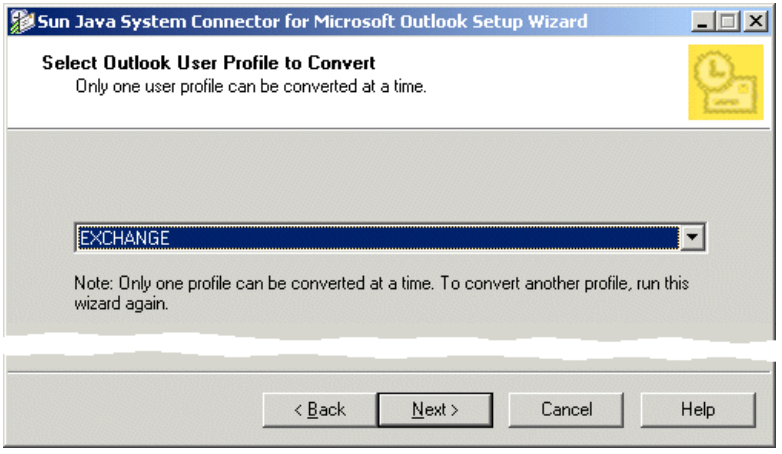
If you answer No: The installation kit does not install WPW on your computer, and the Setup Wizard aborts the entire Sun Java System Connector installation process. (The Setup Wizard will install WPW and proceed with the installation *only* if you accept the WPW License Agreement by clicking the Yes button.)

Step 3: Select an Outlook User Profile to Convert

The screen shown in Figure 2-4 appears only if your administrator has configured your Setup Wizard to convert an existing profile, and if the Setup Wizard:

- finds two or more eligible Outlook user profiles connecting to Exchange server(s) on your computer, ***or***
- finds only one eligible profile that is *not* set as your default.

Figure 2-4 Setup Wizard: Select Outlook User Profile to Convert



An “eligible” profile is any Outlook profile that:

- includes message services of at least one type previously designated by your mail administrator (e.g., Microsoft Exchange, MS POP, MS IMAP, or an earlier version of the Sun Java System Connector); and
- has not yet been fully converted (all of its .pst files converted) by a previous run of this Setup Wizard.

If the Wizard finds only one eligible user profile, and the profile is designated as your default profile, the Wizard will skip this screen on the assumption that you want to convert the one eligible profile for the new software. Skip ahead to Step 4: Select Personal Folders (.pst) Files to Convert.

Similarly, if the Wizard finds no eligible user profile to convert and your administrator has configured the Wizard to create a new user profile in that case, this step 3 does not apply to you — in fact, you can skip steps 4 and 5 too, and resume at Step 6: Enter New Sun Java System Account Login Information.

This screen prompts you to select a single Outlook user profile to convert for use with the new Sun Java System Connector software. It is very similar to the dialog box you likely see when you start Outlook.

To select a profile for conversion:

1. Use the drop-down list box to select the profile you want to convert.
2. Click Next.

You may use the Setup Wizard to convert more than one profile, but only one at a time. You must run the Setup Wizard again for each profile you want to convert.

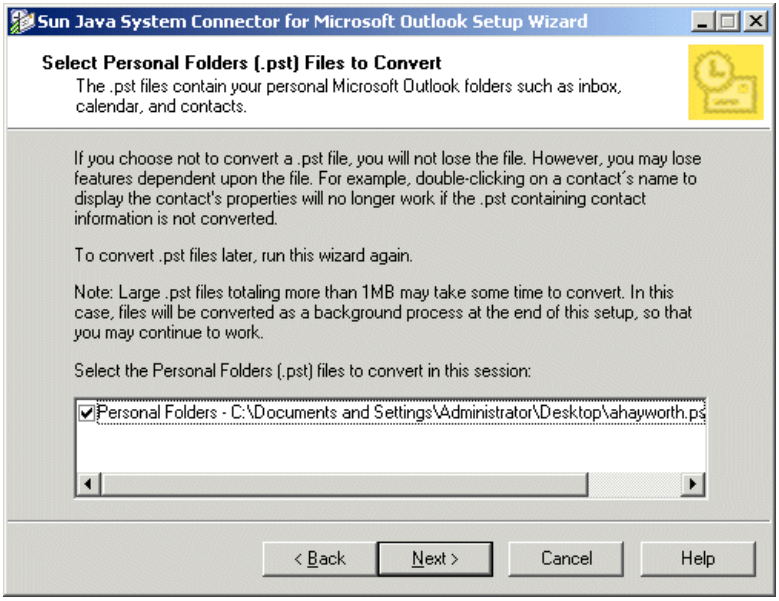
When you click Next, the Setup Wizard finds all of the Personal Folders (.pst) files associated with the user profile you have selected. Go on to Step 4: Select Personal Folders (.pst) Files to Convert.

Step 4: Select Personal Folders (.pst) Files to Convert

This screen appears only if you are converting an Exchange profile, and if the Setup Wizard finds one or more “large” .pst files (exceeding a size limit specified earlier by your mail administrator). If you are converting a POP or IMAP profile, or are upgrading a Sun Java System Connector from version 6.0 to version 7.0, you may skip this step and the next, and resume at step 6 below.

For current Exchange users, the Setup Wizard can convert Contacts, Journal and Notes data from the Exchange server to the Sun Java System Connector profile. The Wizard will automatically convert any .pst files if finds on your desktop that do not exceed the size limit specified by your administrator. If none of your .pst files is "large," the Setup Wizard simply converts all of your .pst files, and you may skip ahead to Step 5: Enter Exchange Account Login Information. But if the Wizard finds one or more "large" .pst files, the program asks you to specify which files (if any) you want to convert at this time, as shown in Figure 2-5.

Figure 2-5 Setup Wizard: Select Personal Folders (.pst) Files to Convert



The Setup Wizard will convert only those files that are checkmarked in the boxes to the left of the corresponding file names. The displayed list may also include one or more smaller .pst files, automatically checkmarked for conversion and grayed out (so that you cannot unmark them).

The Wizard converts these files to make the mail addresses "live." Unconverted email messages would still be readable, but you would be unable to reply to them because the unconverted addresses would be in a form that is unfamiliar to your new server. On the other hand, converting large volumes of old messages can take a long time, even several hours if your personal stores happen to run into gigabytes of data. The conversions can run in the background, freeing you and your computer for other work, but it may slow the performance of your other

applications. For this reason, if you have some personal stores that are very old, so that the need for a future reply is highly unlikely although you'd like to be able to keep and read the data, you can elect to not convert it. Another option is simply to defer the conversion of larger files to a later time, such as during a lunch break or even overnight.

1. Verify that all the files you want to convert now are marked, and that the files you do not want to convert are not marked.

   To add or remove a checkmark, simply click in the box.

2. Click Next.

The Wizard then prompts you to provide your personal login information for your old Microsoft Exchange mailbox. Go on to Step 5: Enter Exchange Account Login Information.

Step 5: Enter Exchange Account Login Information

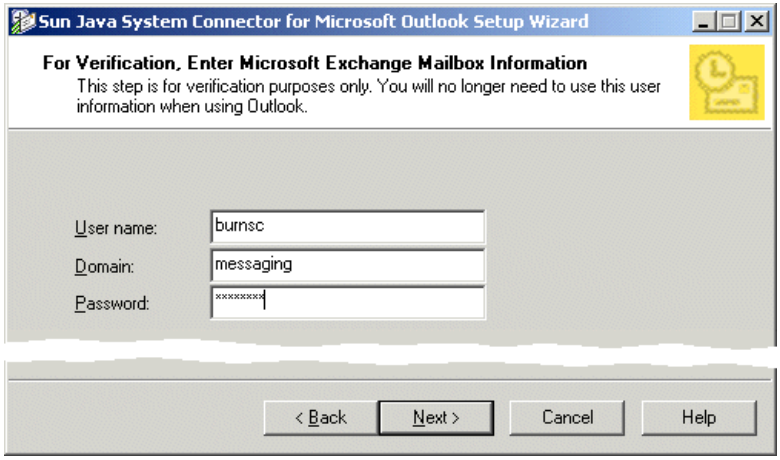
The screen shown in Figure 2-6 appears only if you have previously used Outlook on this computer, and your system is configured to prompt you for this information when you login to use the selected user profile. If you are a new email user who does not have an existing account on the Exchange server, or if your system is configured to not require this information when you log in, this screen will not appear and you may skip ahead to Step 6: Enter New Sun Java System Account Login Information.

To enter the requested information for your old Microsoft Exchange mailbox:

1. Enter your **User name:** the Windows account name associated with your Exchange mailbox.
2. Enter your **Domain:** the domain in which your Windows account resides.
3. Enter your **Password:** the password for your Windows account.
4. Click the Next button.

The Setup Wizard then prompts you to provide your personal login information for your new Sun Java System account. Go on to Step 6: Enter New Sun Java System Account Login Information.

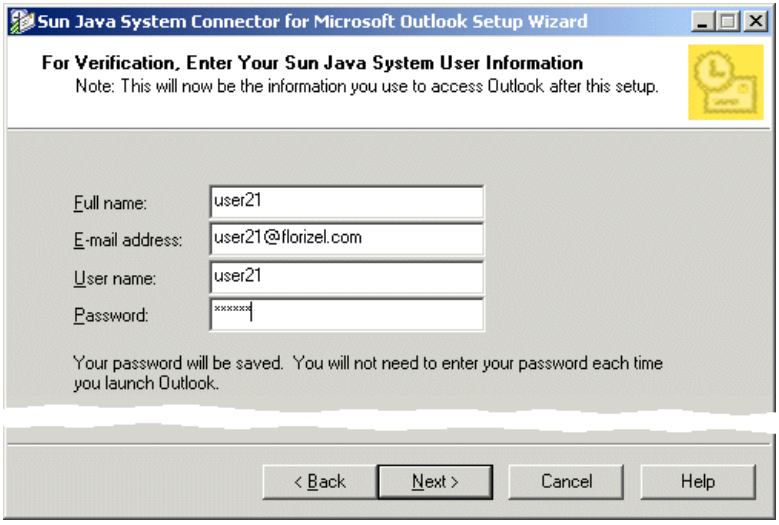
Figure 2-6 Setup Wizard: Enter Microsoft Exchange Mailbox Information



Step 6: Enter New Sun Java System Account Login Information

This screen, shown in Figure 2-7, appears as part of the Setup procedure for all users, to request your login credentials for the new Sun Java System server.

Figure 2-7 Setup Wizard: Enter Your Sun Java System User Information



Some of the fields in this screen may appear grayed out if your network administrator has already entered this information for you. Similarly, the **Save user name and password** checkbox will not appear if your administrator has pre-configured your software to always or never require this information upon login to Outlook.

To enter the requested information for your new Sun Java System account:

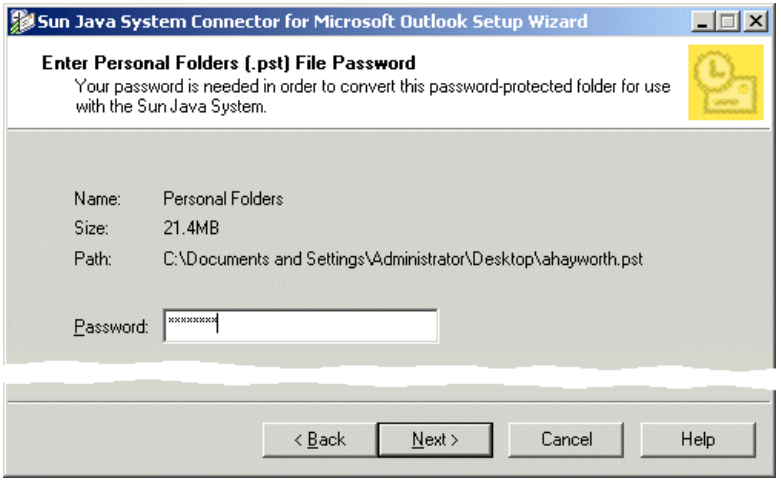
1. Enter your **Full name:** the name that appears in the From field of your outgoing mail messages. This is the “friendly” name displayed to the recipients of your messages.
2. Enter your **E-mail address:** your Internet email address.
3. Enter your **User name:** your account name.
4. Enter your **Password:** the password for your Sun Java System accounts.
5. If the **Save user name and password** checkbox appears in this screen: Check or uncheck the option to indicate whether you want to be able to start Outlook without being prompted for this login information every time.
6. Click the Next button.

The Setup Wizard then checks to see if any of the Personal Folders (`.pst`) files scheduled for conversion are password-protected. Go on to Step 7: Enter Password(s) for Protected Personal Folders (.pst) Files.

Step 7: Enter Password(s) for Protected Personal Folders (.pst) Files

The screen shown in Figure 2-8 appears in the Setup procedure if any of the Personal Folders (`.pst`) files you have selected for conversion are protected by a password, and the password is not saved in the password list. The screen reappears for each password-protected `.pst` file that is scheduled for conversion. If none of your `.pst` files is password-protected, or if all of the files' passwords are saved in the password list, the Setup Wizard simply begins converting the selected user profile and `.pst` file(s), and you may skip ahead to Step 8: Progress Meter(s).

Figure 2-8 Setup Wizard: Enter Personal Folders (.pst) File Password



The screen displays the name, size and location (path) of a password-protected Personal Folders file (.pst file), and prompts you for the password that is required to open the file.

1. Enter the password associated with the named .pst file.
2. Click Next.

When you have entered the password for the last .pst file that requires a password, the Setup Wizard then begins converting the user profile. Go on to Step 8: Progress Meter(s).

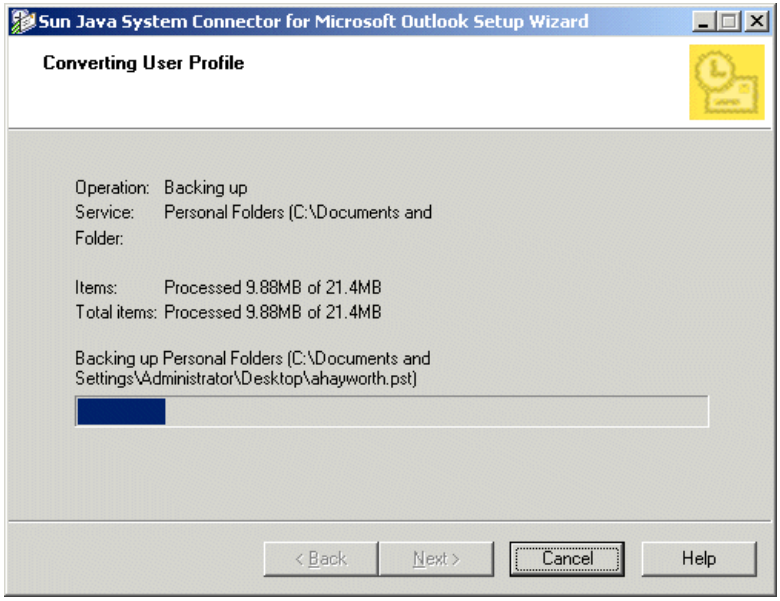
Step 8: Progress Meter(s)

The screen shown in Figure 2-9 illustrates the Wizard's progress as it converts the selected user profile and the “small” Personal Folders (.pst) files, and copies some data (Contacts, Notes and Journals) from your Exchange server to a local store, so you will have access to this data when you start using Outlook with your new Sun Java System server.

When these processes are complete:

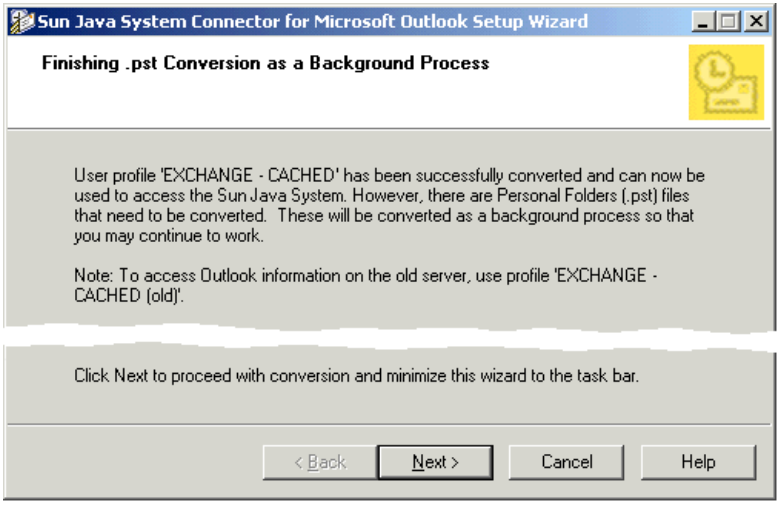
- ***If no “large” Personal Folders (.pst) files are being converted:*** The Wizard simply displays a notification screen to let you know its work is finished. Go on to Step 9: Exit.

Figure 2-9 Setup Wizard: Converting User Profile (Progress Meter)



- ***If any "large" Personal Folders (*.pst*) files are being converted:*** The Wizard notifies you that the profile conversion is complete, and prompts you to begin converting the large Personal Folders files, as shown in Figure 2-10.

Figure 2-10 Setup Wizard: Finishing PST as a Background Process



To begin converting the large Personal Folders (.pst) files: Click Next.

The Setup Wizard then minimizes itself to your Task Bar, to run the conversion(s) in the background. Since the profile conversion is already complete, you may immediately begin using Outlook with the new Sun Java System server, even as the Wizard continues to convert your larger Personal Folders files. The large-file Personal Folders conversion(s) may proceed for several minutes, or even hours, depending on the size of the file(s) being converted.

To view a progress meter showing the real-time progress of the conversion (optional): Restore the Setup Wizard from the Task Bar to its display window.

In either case, the Wizard automatically displays a notification screen when the conversion is finished. Go on to Step 9: Exit.

Step 9: Exit

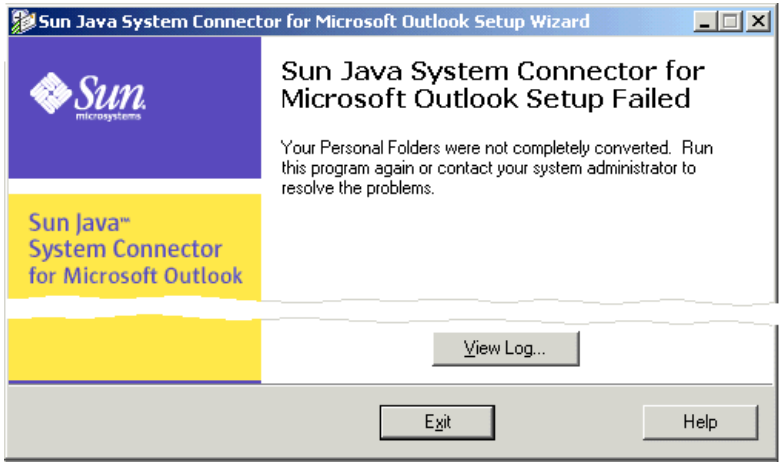
The contents of this Exit screen will vary depending on whether the Setup Wizard has successfully installed the Sun Java System Connector for Microsoft Outlook. The title of the screen reports success or failure:

- **Completing the Sun Java System Connector for Microsoft Outlook:** This screen (e.g., Figure 2-11) simply reports the successful completion of the conversion(s) and of the overall Setup process. Just click the Exit button to clear this screen and close the Setup Wizard. Congratulations! Your Sun Java System Connector for Microsoft Outlook Setup procedure is now complete, and you may now begin using Outlook with the new Sun Java System server.

Figure 2-11 Setup Wizard: Completing the Setup

- **Sun Java System Connector for Microsoft Outlook Setup Failed:** The Setup Wizard has abandoned the installation process, and the text in this screen will explain why. When the Setup fails, this screen (Figure 2-12) offers a **View Log** button that will display the contents of the program's log file, which may offer additional clues to help you diagnose a problem.

Figure 2-12 Setup Wizard: Setup Failed



A Setup failure will be due to one of these four problems:

- ***Microsoft Outlook is not set as your default email client.*** For more information and instructions to correct this problem, see "If Microsoft Outlook Is Not Your Default E-mail Client" in Chapter 6 of this *User's Guide*.
- ***The Setup Wizard has detected the presence of an incompatible Sun synchronization program on your computer.*** For more information and instructions to correct this problem, see "If a Sun Synchronization Program Is Installed, and Must Be Removed" in Chapter 7 of this *User's Guide*.
- ***You are running a version of Microsoft Outlook or an associated Office Service Pack that is incompatible with the Connector software.*** For more information about this problem, see "System Requirements" near the beginning of this Chapter 2.

- ***You have declined the License Agreement for Microsoft's Web Publishing Wizard (WPW)***, which is a required accessory for the Sun Java System Connector for Microsoft Outlook. The Setup Wizard will not install the Connector software without the WPW, and it will not install the WPW without your acceptance of the License Agreement.

Regardless of whether the Setup Wizard successfully completed the installation: Click the Exit button to clear this screen and close the Setup Wizard.

Chapter 3

Getting Started

Once Sun Java System Connector for Microsoft Outlook is installed and configured on your desktop, you can open Outlook and begin using Connector for Microsoft Outlook. This section describes the initial settings and appearance, and also some of the typical getting started tasks.

The following topics are discussed in this section:

- Starting Outlook
- Appearance
- Typical Initial Profile
- Accessing Your Inbox
- Accessing Your Calendar
- Accessing Your Contacts

Starting Outlook

When you first start Outlook, you may be asked which profile to use. Select the Connector for Microsoft Outlook profile that you created during installation and click OK.

Appearance

When Outlook opens, you see:

- **Outlook Shortcuts**: Outlook Today, Inbox, Calendar, Contacts, Tasks, Notes, and Deleted Items.
- **Folders List**

  The Folders List is made up of the following:

  - Your mail Inbox and other mail folders in your specified mail server.
  - Your Calendar, Contacts, Tasks, Shared Calendars, Journal, and Notes folders.
  - Outbox, Sent Items, Drafts, and Deleted Items.

The items in your default Inbox (and other mail folders), Journal, Notes, Sent Items, and Deleted Items folders are stored on the mail server. Items in Outbox are locally stored on your machine. The items in the default Calendar and Tasks folders are stored in the calendar server. The items in your Contacts are stored in the address book server. Any subfolder under the default Calendar, Tasks, and Contacts are locally stored.

Typical Initial Profile

The Sun Java System Connector for Microsoft Outlook software that is installed on the client enables server-side features and functionality available through the user interface. A typical Connector for Microsoft Outlook profile consists of:

- **Mail**—the information store for incoming mail (IMAP) and SMTP transport for outgoing mail.
- **Calendar**—the information store for calendar data.
- **Address Book**—the information store for contacts.

Accessing Your Inbox

You can access your email inbox on the Sun Java System Messaging Server using one of the following methods:

- Select the **Inbox** subfolder under Folders - *your name.*

- In the Outlook Today view, select **Inbox** under the Messages category.
- Click **Inbox** under the Outlook Shortcuts view.

Accessing Your Calendar

You can access your default calendar on the Sun Java System Calendar Server using one of the following methods:

- Select the **Calendar** subfolder under Folders - *your name.*
- In the Outlook Today view, select **Calendar**.
- Select **Calendar** under the Outlook Shortcuts view.

Accessing Your Contacts

You can access your contacts on the Sun Java System Address Book Server using one of the following methods:

- Select **Contacts** under Folders - *your name.*
- Select **Contacts** under the Outlook Shortcuts view.

Chapter 4

Configuring Connector for Microsoft Outlook

This section describes how to set up your Outlook properties to work with Sun Java System Connector for Microsoft Outlook and the servers for mail, calendar, and address book.

The following topics are discussed in this section:

- Configuring Servers and User Accounts
- Configuring Mail Properties
- Configuring Calendar Properties
- Configuring Address Book Properties
- Configuring Store and Logging Properties

Configuring Servers and User Accounts

You initial server and user account settings should be configured when you set up your profile with the Deployment Configuration Program. To change any of these initial configuration settings:

1. Exit Outlook.
2. Right-click the Microsoft Outlook icon and select Properties.

3. When the Services window opens, choose Folders - *your name* and click **Properties**.

   The Sun Java System Connector for Microsoft Outlook properties dialog appears. Make sure the Sun Java Enterprise System tab is selected.

   a. Within this tab, you can change the servers and settings for the following Sun Java System servers:

      - **Incoming Mail**—name and port number of the Messaging Server on which you receive incoming mail. Note that if you are not using a Domain Name Server, but instead have your IP addresses and mnemonic names defined in a HOSTS file, the first mnemonic name must match this Server Name configuration field. If you specify an IP address in this field, be sure to embed it in square brackets (for example, `[129.179.11.22]`). The default port number is 143.
      - **Outgoing Mail**—the name and the port number of the Messaging Server via which to send messages using the SMTP protocol. Note that if you are not using a Domain Name Server, but instead have your IP addresses and mnemonic names defined in a HOSTS file, the first mnemonic's name must match this Server Address configuration field. If you specify an IP address in this field, be sure to embed it in square brackets (for example, `[129.179.11.22]`). The default port number is 25.
      - **Calendar**—The name of the server and the port number on which the Calendar Server is running. The default port number is 80.
      - **Address Book**—The name and the port number on which the Address Book Server is running. The default port number is 80.

      If the SSL checkbox is enabled for any of the above servers, an SSL connection will be attempted, using the port specified in Port.

   b. You can configure the following user settings within the Sun Java Enterprise System tab:

      - **Full Name**—a readable form of your name. It is used to add descriptive information to your e-mail address when generating and sending mail messages.
      - **User Name**—your userID that the servers use to access your information.

- **Password**—your password. Enable the Remember Password checkbox if you wish to have an encrypted form of your password saved into the local registry. If not checked, the password is not saved, and you are always prompted for the password when initiating a client session.
- **E-Mail Address**—your e- mail address. This is the address placed in a message's From: header, if the composed message does not have a from field to override it. It is often used to identify the return address when the receiver of a message needs to generate replies, receipts, notifications, and so on.

4. When you are finished making changes, click OK.

Configuring Mail Properties

To change mail properties:

1. In the Folders List, right-click **Folders - *your name***.
2. In the pop-up menu, select **Properties for "Folders - *your name.*"**
3. In the Mail Folder Properties window, click the **Advanced...** button.
4. In the Sun Java System Connector for Microsoft Outlook properties dialog, select the **Mail** tab.

   Within this tab, you can change the properties for incoming mail (IMAP) and outgoing mail (SMTP):

   - **Synchronize Mail folders every *x* minutes**—the interval after which a server mailbox may be polled for any recently-arrived messages. If any new messages arrive, the mailbox is refreshed and redisplayed. This value defaults to 5 minutes. A minimum frequency of 1 minute is enforced. If this field is cleared or set to zero, no polling will be performed for this server connection.
   - **Offline settings**
     - **Download messages**—If this option is enabled all messages in folders that have been selected for offline use are downloaded into the local cache when working in offline mode. See "Working Offline" for instructions on how to work offline. See "Selecting a Folder for Offline Use" for instructions on how to select a folder for offline use. By default your Inbox is downloaded.

- **Do not download messages if they are larger than X KB**—If this option is enabled, only messages that are smaller than the value entered into the field are downloaded into the local cache when working in offline mode. This field is primarily intended to reduce download times when going into offline mode.

- **Server requires Authentication**—if this checkbox is enabled, SMTP authentication is required for sending mail.

- **Use Alternate Account**—if this checkbox is enabled, the SMTP server uses the provided User Name and User Password for SMTP AUTH authentication. If the checkbox is not enabled, it is defaulted to Sender's E-mail Address.

- **Send BCC to sender's E-mail address**—if this checkbox is enabled, any email that is sent will have the e-mail address in the BCC. This effectively provides a way for senders to file a copy of all messages they send. The messages are filed within a sender's server INBOX, and will be subsequently affected by any server-based message filtering rules.

5. When you are finished making changes, click **OK**.

Configuring Calendar Properties

To change calendar properties:

1. In the Folders List, right-click **Folders - *your name***.
2. In the pop-up menu, select **Properties for "Folders - *your name.*"**
3. In the Mail Folder Properties window, click the **Advanced...** button.
4. In the Sun Java System Connector for Microsoft Outlook properties dialog, select the **Calendar** tab.

   Within this tab you can change the following Calendar properties:

   - **Synchronize Every *x* minutes**—the amount of time you want Outlook to sync information with the Calendar Server.

   - **Use Alternate User account**—if this checkbox is enabled, Calendar Server uses an alternate user account than the account specified under the Sun Java Enterprise System tab. Enter the User Name and User Password for this alternate Calendar Server account in the appropriate fields.

5. When you are finished making changes, click **OK**.

Configuring Address Book Properties

To change address book properties:

1. In the Folders List, right-click **Folders - *your name***.
2. In the pop-up menu, select **Properties for "Folders - *your name.*"**
3. In the Mail Folder Properties window, click the **Advanced...** button
4. In the Sun Java System Connector for Microsoft Outlook properties dialog, select the **Address Book** tab.

   Within this tab you can change the following Address Book properties:

   - **Address Book Server URL**—add the URL path portion to the server information. This is the URL used to connect to the Address Book Server from Outlook. The default URL is `http://`*server*`:80/uwc`.
   - **Use Alternate User account**—if this checkbox is enabled, Address Book Server uses an alternate user account than the account specified under the Sun Java Enterprise System tab. Enter the User Name and User Password for this alternate Address Book Server account in the appropriate fields.
5. When you are finished making changes, click **OK**.

Configuring Store and Logging Properties

To change store and logging properties:

1. In the Folders List, right-click **Folders - *your name***.
2. In the pop-up menu, select **Properties for "Folders - *your name.*"**
3. In the Mail Folder Properties window, click the **Advanced...** button
4. In the Sun Java System Connector for Microsoft Outlook properties dialog, select the **Advanced** tab.

   a. Within this tab you can change the following information store properties:

      - **File Path**—the path for the PST database files. This setting cannot be changed.

- **Synchronize All...**—updates the local Outlook calendar, task, and contacts data from the Sun Java System Calendar Server. This will delete all local Calendar and task items. All calendar, task, and contacts attachments and embedded data objects will also be removed. Check the box to empty all calendar and task items. Click Yes to continue or No to cancel.
- **Personal Folders**—updates your personal folders information.

b. You can also change the following logging properties:

- **Log File**—the location of the log file. The default is `C:\\Documents and Settings\`*`userid`*`\Local Settings\Temp\Sun Outlook Connector Logs\sjoc.log`. This setting cannot be changed.
- **Log Level**—Specify the level of logging. The choices are: Debug Low, Debug, Information, Warning, Error, and Critical Error.

5. When you are finished making changes, click **OK**.

Chapter 5

Working with Email Folders

This section describes how to work with email folders and provides some tips on features that are specific to Sun Java System Connector for Microsoft Outlook.

The following topics are discussed in this section:

- Accessing Your Inbox
- Shared Folders
- Delegating Access to a Mail Folder
- Working Offline
- Changing the Folder Class

Accessing Your Inbox

You can access your email inbox on the Sun Java System Messaging Server using one of the following methods:

- Select the **Inbox** subfolder under Folders - *your name*.
- In the Outlook Today view, select **Inbox** under the Messages category.
- Select **Inbox** under the Outlook Shortcuts view.

Shared Folders

To subscribe to a shared folder:

1. In the Folder List, right-click Shared Folders and select **Properties**.

   The Shared Folders Properties dialog appears.

2. Select the **Subscribe** tab.

3. Click **Subscribe...**

4. In the Add Shared Folders dialog:

   - If you know the owner's userID of the folder to which you wish to subscribe, enter that userID and click **Query**.
   - If you do not know the owner's userID, enter * or nothing to list all available shared folders and click **Query**.

   The folders that are available to be shared and are not already subscribed by you are listed. Select one or more folders in the list and click **Add** to subscribe.

5. Click **OK** and the subscribed folders appear in the Shared Folders list in the Shared Folders Properties dialog.

6. Click **OK** in the Shared Folders Properties dialog and the subscribed folders appear as a subfolder of your Shared Folders.

To unsubscribe from a shared folder:

1. In the Folder List, right-click Shared Folders and select **Properties**.

   The Shared Folders Properties dialog appears.

2. Select the **Subscribe** tab.

   A list of subscribed folders appears in the Shared Folders list.

3. Select the folder from which you wish to unsubscribe and click **Unsubscribe**.

   A dialog appears asking you if you want to unsubscribe to that particular folder. Click **Yes** to unsubscribe or **No** to cancel.

4. Click **OK** and your Shared Folders are updated to remove that folder.

NOTE You cannot change the permission rights of a shared folder—only the folder owner can change permissions. You can only view the permissions granted to you.

Delegating Access to a Mail Folder

You can grant access to or share one of your mail folders to other users. To share one of your mail folders:

1. Right-click the folder you wish to share and select **Properties**.

   The properties dialog for that folder appears.

2. Select the **Permissions** tab.

3. Enter the userID of the person to which you want to share this folder, or select **anyone** (to grant access to all users) and click **Add**.

   The specified userID (or **anyone**) appears in the list below the User Name field.

4. Select the userID (or **anyone**) from the list and choose the permission rights you wish to grant.

   The available permission rights are:

   - Read only
   - Read and write
   - Read, write, and manage
   - None

5. Click **Apply** to apply changes or **OK** to apply changes and exit the dialog.

Working Offline

You can choose to work offline with your Sun Java System Connector for Microsoft Outlook folders.

Setting the Offline and Online Mode

To work offline:

1. In the **File** menu select **Work Offline (Sun Java System Connector)**.

   The Work Offline dialog appears.

2. Click **Yes** to download messages before going to offline mode. You can set the size limit of the downloaded. See "Configuring Mail Properties" for instructions on setting these properties.

   Only the messages in folders selected for offline use will be downloaded. See "Selecting a Folder for Offline Use" for instructions.

   Click **No** if you do not wish to download any messages.

   A check appears next to this menu item.

Once you are in offline mode, Connector for Microsoft Outlook disconnects from the server, and all subsequent operations (for example composing, deleting, and moving messages) will occur on your local machine until you switch back to online mode.

To return to online mode, in the **File** menu select **Work Offline (Sun Java System Connector)**. The check disappears from this menu item.

Selecting a Folder for Offline Use

You can specify a folder to download for offline use. To select a specific folder:

1. Right-click on the folder you want to download and select **Properties.**

   The Properties dialog for that folder is displayed.

2. Select the **Advanced** tab.
3. Enable the box next to **Select this folder for offline use**.
4. Click **OK** or **Apply**.

Changing the Folder Class

You can use Outlook's **New->Folder** menu option to create a folder that contains calendar, contact, journal, note, task, or mail items. These items in any newly created folder are stored on the mail server.

NOTE The items in the default Journal and Notes folders are stored on the mail server. The items in the default Calendar, Tasks, and Contacts folders are stored in the calendar server (Calendar and Tasks) and address book server (Contacts). Any subfolder under these default Calendar, Tasks, and Contacts are locally stored.

This feature allows you to create a new Contacts folder that is stored on the mail server, for example, and share it with another user. However, if another user has created a new shared Contacts folder and you subscribe to it, or if you log onto Outlook using a different machine, all folders stored on the mail server are assumed to be mail folders unless you change the folder class to correct this.

To change the folder class:

1. Right-click on the folder you want to change and select **Properties**.

   The Properties dialog for that folder is displayed.

2. Select the **Advanced** tab.
3. Enable the box next to **Change this folder to contain**.
4. Select which class of folder you want from the pull-down list.
5. Click **OK** or **Apply**.

Chapter 6

Working with Calendar Folders

This section describes how to work with calendar folders and provides some tips on features that are specific to Sun Java System Connector for Microsoft Outlook.

The following topics are discussed in this section:

- Accessing Your Calendar
- Shared Calendars
- Delegating Access to a Calendar

Accessing Your Calendar

You can access your default calendar on the Sun Java System Calendar Server using one of the following methods:

- In the Folder List, select the **Calendar** subfolder under Folders - *your user name.*
- In the Outlook Today view, select **Calendar**.
- Select **Calendar** under the Outlook Shortcuts view.

Shared Calendars

To subscribe to a shared calendar:

1. In the Folder List, right-click **Shared Calendars** and select **Properties**.

   The Shared Calendar Properties dialog appears.

2. Select the **Subscribe** tab.

3. Click **Subscribe...**

4. In Add Calendar dialog:

   If you know the userID of the calendar to which you wish to subscribe, enter that userID and click **OK**.

   If you do not know the userID of the calendar to which you wish to subscribe:

   a. Click **Search**.

   b. In the Address Book dialog, click **Find** to locate the calendar.

   c. Enter as much of the calendar userID or calendar owner name as you can in the Find dialog and click **OK**.

   d. Select the calendar from the list in the Address Book dialog and click **OK**.

5. Click **OK** in the Shared Calendar Properties window.

   The calendar is added to your list of subscribed calendars.

To unsubscribe from a shared calendar:

1. In the Folder List, right-click **Shared Calendars** and select **Properties**.

   The Shared Calendar Properties dialog appears.

2. Select the **Subscribe** tab.

   A list of subscribed calendars appears in the Calendars list.

3. Select the calendar from which you wish to unsubscribe.

4. Click **Unsubscribe...**

5. A dialog appears asking if you wish to unsubscribe from this calendar. Click **yes** to unsubscribe. Click **no** to cancel.

   The calendar will be deleted from your subscribed calendar list.

Delegating Access to a Calendar

You can grant access to your calendar to other users. The access permissions range from being able to read your calendar, to allowing another user to create, modify, or delete events in your calendar.

To delegate access to your calendar:

1. Right-click **Calendar** from Folders - *your user name* and select **Properties**.

   The Calendar Properties window appears.

2. Select the **Permissions** tab.
3. Click **Add user...**
4. In the Add User dialog, enter the userID and choose the permission settings, or click **Search...** to search for a user.
5. Click **OK** to delegate access to your calendar to the specified user.

NOTE If you are granted access to another calendar, and create an event in that calendar, the calendar owner is listed as the organizer of that event. Any email reminders sent about that event is sent on behalf of the calendar owner.

Chapter 7

Troubleshooting

If Microsoft Outlook Is Not Your Default E-mail Client

The Sun Java System Connector for Microsoft Outlook can be installed only if Microsoft Outlook is set to be your default email client. If Outlook is *not* set as your default email client, the Setup Wizard will notify you of the problem (in an error message after the Welcome screen), and prompt you to acknowledge the notice and exit the program. You may then rerun the Setup Wizard after you set your default email client to Outlook as described here:

1. Open your Windows Control Panel. If you are running Windows XP (only): Select “Switch to Classic View.”
2. Double-click on Internet Options.
3. Select the Programs tab from the Internet Properties window.
4. Select Microsoft Outlook from the Email pull-down menu.
5. Click OK.

If a Sun Synchronization Program Is Installed, and Must Be Removed

The MAPI services for the Sun Java System Connector for Microsoft Outlook are a required component of the Connector installation, but cannot coexist with the Sun Java System Synchronization program (previously known as the ONE Sync program). If one of these Sun synchronization programs is installed on your work-

station, the Setup Wizard will notify you of the problem (in an error message after the Welcome screen), and prompt you to acknowledge the notice and exit the program. You may then rerun the Setup Wizard after you remove the synchronization program.

To remove the synchronization program from your workstation:

1. From your Start menu: Select the **Uninstall...** option for the program you want to uninstall — either:
   - **Programs** > **Sun Java System Synchronization** > **Uninstall Sun Java System Synchronization**, or
   - **Programs** > **Sun ONE Synchronization** > **Uninstall Sun ONE Synchronization**.
2. In the Uninstallation window: Follow the prompts to uninstall the software.
3. Click Finish to complete the uninstallation process.

To synchronize your Palm device, WinCE device or Pocket PC device with Outlook, we strongly recommend that you use the sync software distributed with your device, rather than the Sun synchronization software. Changing to the sync software distributed with your device may require uninstalling and reinstalling the Palm Desktop software.

If you want to continue using the Sun synchronization software to sync to the data of your other device: Reinstall the software, but do *not* select the checkbox for the Microsoft Outlook 98/2000 translator during the installation.

If a Personal Folder (.pst) File Conversion Is Interrupted

Since Personal Folder (`.pst`) file conversions can run for many minutes or even hours for large files, an interruption of the process — by a power failure, for example — could be especially inconvenient if it meant having to repeat the lengthy process from scratch. The Setup Wizard therefore offers a recovery feature that lets you resume an interrupted conversion from wherever it was interrupted. Note that this recovery feature is available *only* when an interruption occurs during a “large” Personal Folder conversion — *not* during a profile conversion or during the conversion of smaller `.pst` files. (Your network administrator has previously set a size limit to define the difference between “large” and “small” files.)

If the conversion of a large .pst file is interrupted, the Wizard will temporarily add to your desktop an icon for the recovery feature, titled “Finish Aborted Sun Java System Connector Wizard Conversion.” The recovery feature will *not* work if you simply restart the Setup Wizard as you ran it for your original conversion; you *must* start it from the desktop “Finish” icon, as shown in Figure 7-1.

Figure 7-1 To Finish an Aborted Conversion: The Desktop “Finish” Icon

To complete an interrupted conversion: **Start the recovery mode of the Sun Java System Connector Setup Wizard,** by double-clicking the “Finish” desktop icon.

The Wizard then displays its Welcome screen, as shown in Figure 7-2, and notifies you that it has detected an incomplete conversion.

Figure 7-2 Setup Wizard Welcome Screen, to Resume an Interrupted Conversion

This recovery procedure is an abbreviated version of the original Setup procedure, as described in Chapter 2 of this *User's Guide* (see "The Setup Procedure"). The Wizard remembers, from its interrupted run, which user profile and which Personal Folders (`.pst`) files you selected for conversion, so it will not prompt you for that information again.

Instead, when you click Next from the Welcome screen shown here, the Wizard skips ahead to step 5 or 6 of the original Setup procedure: to prompt you for your old Exchange login information (step 5) if you previously used Outlook on this computer, or for your new Sun Java System Account login information (step 6) if you will be a new Outlook user. From step 5 or 6 forward, the procedures are identical, so please refer to the main body of this *User's Guide* for step-by-step instructions.

Logging

This section provides troubleshooting tips for logging and log reports.

Enabling Logging for Troubleshooting

In order to keep track of any problems that may arise with your mail folders or messages, it is recommended to turn on the logging function for debugging purposes. To do this:

1. From the **Help** menu, select **About Sun Java System Connector for Microsoft Outlook**.
2. In the About dialog, click **Debug Logs**.
3. In the Debug Logs dialog, enable the checkbox next to **Turn on debug logging**.

   The Log file path indicates the location of the log files.
4. When you are finished, click **OK**.

Sending a Log Report

You can send a log report of any problems to your technical support representative. To do this:

1. Turn on logging as indicated in "Enabling Logging for Troubleshooting."

2. Return to Outlook and attempt to reproduce the steps the caused the problem.
3. From the **Help** menu, select **About Sun Java System Connector for Microsoft Outlook**.
4. In the About dialog, click **Debug Logs**.
5. In the Debug Logs dialog, enter the email address of your technical support representative.
6. Click **Report**.

   A new message appears addressed to technical support. A copy of your log file and your system information is also included in the message.
7. You may enter any more information, or cc anybody else before sending the message.

Increasing Log Files and Size

Log files are regularly reused and overwritten by new log files. This occurs more frequently for users with large mailboxes. You can increase the size of your log files or increase the number of logs files by resetting three registry keys. The registry keys are:

- `HKEY_CURRENT_USER\Software\Sun Microsystems\Outlook Connector`
- `Maximum Log File Size`
- `Maximum Number Log Files`

Assigning Tasks

When assigning tasks to other users, you cannot set different permissions to tasks and your calendar. The permissions assigned to your calendar applies to your tasks, and visa versa.

If you are assigned a task, you cannot read the message in your inbox. Move it to one of your local folders in order to read the task message.

If a Server is Down

If Messaging Server is down, you will be unable to log into Outlook. You can, however, work in offline mode.

If Messaging Server is working, but Calendar Server or Address Book Server is down, you can log in to Outlook, but you will be unable make any changes (for example, create new events, new contacts).

Glossary

Refer to the Java Enterprise System Glossary (http://docs.sun.com/doc/816-6873) for a complete list of terms that are used in this documentation set.

Index

A

accessing your calendar 35, 49
accessing your inbox 34, 43
appearance 34

C

calendar
  shared calendars 49
calendar folders 49
Checking for Minimum Installation Requirements 21
Completing the Sun Java System Connector for Microsoft Outlook (screen) 30
configuring address book properties 41
configuring calendar properties 40
configuring logging properties 41
configuring mail properties 39
configuring servers and user accounts 37
configuring store properties 41
Converting User Profile 28

D

default email client 20, 31, 53
delegating access to a calendar 51
documentation 16
  overview 12

E

eligible Outlook user profile, defined 23
email folders 43
Enter Microsoft Exchange Mailbox Information 25
Enter Personal Folders (.pst) File Password 27
Enter Your Sun Java System User Information 26
Exchange account login information 25
Exchange Contacts, converting 24, 28
Exchange Journal, converting 24, 28
Exchange Notes, converting 24, 28
Exit screen 30

F

Finishing PST as a Background Process 29
folder class
  changing 46
free/busy schedule 21

G

getting started 33

I

interrupted conversion 19, 54

L

log reports 56
logging 56
  increasing log file size 57

M

mail
  delegating access to folders 45
  shared folders 44
Microsoft Web Publishing Wizard 32
  installing 21

O

offline mode
  email 45
Outlook user profiles
  converting 22
  converting more than one 23

P

Personal Folders (.pst) files 24, 27, 29, 54
  passwords for 27
progress meter 28, 30

S

Select Outlook User Profile to Convert 22
Select Personal Folders (.pst) Files to Convert 23
Sending a log report 56
server problems 58
Setup Failed (screen) 31
Setup Wizard conversion program 17
Setup Wizard installation package 17
Setup Wizard Welcome screen 19
  to resume an interrupted conversion 55
shared calendars 49
  delegating access 51
  subscribing and unsubscribing 49
shared folders 44
  delegating access 45
  subscribing and unsubscribing 44
Solaris
  patches 13
  support 13
starting the Setup Wizard 19
Sun Java System Connector for Microsoft Outlook
  Overview 15
Sun Java System Synchronization program,
  incompatability with software 20, 31, 53
support
  Solaris 13
system requirements 18

T

typical initial profile 34

W

working offline
  email 45