Sun Java System Connector for Microsoft Outlook 7.2 Administration Guide

Sun Microsystems

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Preface

This guide describes the Deployment Configuration Program for the Sun Java™ System Connector for Microsoft Outlook and how to create customized installation and conversion packages for Microsoft Outlook end users.

Who Should Use This Book

You should read this book if you are responsible for administering and deploying Sun Java System Connector for Microsoft Outlook at your site.

Before You Read This Book

This book assumes that you are responsible for administering and deploying Connector for Microsoft Outlook software and that you have a general understanding of the following:

- The Internet and the World Wide Web
- Sun Java System Calendar Server protocols and Sun Java System Messaging Server protocols
- System administration and networking for the following:
  - Microsoft Windows 2000
  - Microsoft Windows XP
- Microsoft Outlook
- General deployment architectures

How This Book Is Organized

This book contains the following chapters:

Chapter 1 explains what the Sun Java System Connector for Microsoft Outlook is designed to do, how it is typically used within the context of an overall migration scenario, and what you should do to get started with the software including instructions for installing the administrator's software on your own computer.

Chapter 2 describes how to use the Deployment Configuration Program to create customized packages for Outlook end users. Depending on your circumstances, you can configure these

packages to install the necessary software, to convert existing Microsoft Outlook and Exchange data files for use with the new Connector for Microsoft Outlook, or both.

Chapter 3 explains how to deploy Connector for Microsoft Outlook under certain special circumstances or network configurations.

Connector for Microsoft Outlook Documentation Set

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

TABLE P–1   Books in This Documentation Set

Book Title	Description
Part VI, "Deploying Connector for Microsoft Outlook," in *Sun Java Communications Suite 5 Deployment Planning Guide*	Describes the administrator's process and strategies for deploying Connector for Microsoft Outlook to end-user desktops.
Sun Java System Connector for Microsoft Outlook 7.2 Installation Guide	Describes how to install the administration software that helps an administrator deploy Connector for Microsoft Outlook to end-user desktops.
Sun Java System Connector for Microsoft Outlook 7.2 Administration Guide	(This guide) Describes the administrator's deployment configuration program for the Connector for Microsoft Outlook.
Sun Java System Connector for Microsoft Outlook 7.2 User's Guide	Explains how to install, use, and configure the Connector for Microsoft Outlook on your desktop. This guide also describes the user interface.
Sun Java Communications Suite 5 Release Notes	Contains last-minute information, new features, known problems and limitations, installation notes, and how to report issues with the software or the documentation.

The Connector for Microsoft Outlook documentation collection can be found at http://docs.sun.com/coll/1630.1.

Related Books

For other server documentation, go to the following:

- Sun Java System Messaging Server documentation (http://docs.sun.com/coll/1312.2)
- Sun Java System Calendar Server documentation (http://docs.sun.com/coll/1313.2)

Typographic Conventions

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

TABLE P–2 Typographic Conventions

Typeface	Meaning	Example
AaBbCc123	The names of commands, files, and directories, and onscreen computer output	Edit your `.login` file. Use `ls -a` to list all files. `machine_name% you have mail.`
AaBbCc123	What you type, contrasted with onscreen computer output	`machine_name%` **su** `Password:`
AaBbCc123	A placeholder to be replaced with a real name or value	The command to remove a file is `rm` *filename*.
AaBbCc123	Book titles, new terms, and terms to be emphasized (note that some emphasized items appear bold online)	Read Chapter 6 in the *User's Guide*. A *cache* is a copy that is stored locally. Do *not* save the file.

Shell Prompts in Command Examples

The following table shows default system prompts and superuser prompts.

TABLE P–3 Shell Prompts

Shell	Prompt
C shell on UNIX and Linux systems	`machine_name%`
C shell superuser on UNIX and Linux systems	`machine_name#`
Bourne shell and Korn shell on UNIX and Linux systems	`$`
Bourne shell and Korn shell superuser on UNIX and Linux systems	`#`
Microsoft Windows command line	`C:\`

Symbol Conventions

The following table explains symbols that might be used in this book.

TABLE P–4 Symbol Conventions

Symbol	Description	Example	Meaning
[ ]	Contains optional arguments and 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.
${ }	Indicates a variable reference.	`${com.sun.javaRoot}`	References the value of the `com.sun.javaRoot` variable.
-	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.
→	Indicates menu item selection in a graphical user interface.	File → New → Templates	From the File menu, choose New. From the New submenu, choose Templates.

Documentation, Support, and Training

The Sun web site provides information about the following additional resources:

- Documentation (http://www.sun.com/documentation/)
- Support (http://www.sun.com/support/)
- Training (http://www.sun.com/training/)

Third-Party Web Site References

Third-party URLs are referenced in this document and provide additional, related information.

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Getting Started

The Sun Java System Connector for Microsoft Outlook enables users in your organization to use Microsoft Outlook as their email and calendar client while connected to Sun Java System servers. The Connector for Microsoft Outlook must be installed and configured on each user desktop to facilitate the necessary ongoing communications between Microsoft Outlook and the Sun Java System server. The Connector for Microsoft Outlook software is installed one desktop at a time by a Setup Wizard that can also convert any existing Microsoft Outlook data files to a format that the new software can read and use.

Introduction and Orientation

To simplify both the administrator's work associated with deployment and the user's tasks in actually installing and configuring the new software, Sun provides a Deployment Configuration Program. This tool lets the administrator create customized end-user installation packages for the software, with pre-set configuration parameters to simplify and streamline the user's process, and to enforce any configuration settings the administrator deems necessary or desirable for a particular user or group of users. The Deployment Configuration Program saves those pre-set configuration parameters in an .ini text file, and then bundles the .ini file with an installation program—the Setup Wizard—for end users. When an end user activates the package, the Setup Wizard reads the .ini file to install and configure the Connector software on the user's desktop according to the administrator's specifications.

A system administrator may create different installation packages for different individual users, or for different groups of end users—for example, to enforce different configuration schemes for users in the Sales department versus the Engineering department and so forth, or to offer configuration options to some groups of users while setting fixed parameters (eliminating the choices) for others.

Administrator's Process Overview

In a typical deployment scenario, an administrator will perform four primary tasks to deploy the Sun Java System Connector for Microsoft Outlook.

▼ To Deploy the Connector for Microsoft Outlook

1   Prepare a comprehensive Deployment Plan.

Planning and foresight are critical to a smooth deployment. The process of developing a comprehensive Deployment Plan is a valuable exercise that will lead you to consider and accommodate all of the factors likely to influence your organization's migration. The Part VI, "Deploying Connector for Microsoft Outlook," in *Sun Java Communications Suite 5 Deployment Planning Guide* explains important migration concepts, prerequisites, and strategic choices, and explains how to develop a Deployment Plan that will guide you through your migration. Every administrator should therefore read Part VI, "Deploying Connector for Microsoft Outlook," in *Sun Java Communications Suite 5 Deployment Planning Guide* and prepare a comprehensive Deployment Plan.

2   Install the Deployment Configuration Program.

Sun's administrative software obviously must reside on the administrator's computer before it can be used to create end-user installation packages. The installation instructions can be found in the *Sun Java System Connector for Microsoft Outlook 7.2 Installation Guide*.

3   Configure end-user package.

Chapter 2 explains how to use the Deployment Configuration Program to create customized packages for Outlook end users. These packages can be configured to install the necessary software on user desktops, or to convert users' existing Outlook and Exchange data files for use with the new software—or both, depending on your circumstances.

4   Deploy each end-user package.

Once you have created an installation package for your users, you must tell them where to find it and how to use it. Many administrators simply copy the package and the associated *Sun Java System Connector for Microsoft Outlook 7.2 User's Guide* to a shared folder, and then provide links to the installation package and documentation in an announcement email to users.

Steps 1 and 2 of this process overview are a good place to start regardless of your unique configuration and preferences. If your migration strategy calls for two or more different installation packages for different users or user groups, simply repeat steps 3 and 4 for each package until all users have been migrated.

The deployment process can proceed along different paths depending on your original and destination network configurations, the administrative structure of your organization, and your own informed sense of the extent to which your users should be involved in the process of

installing and configuring their own desktop software. Moreover, your network configuration or preferences may dictate some variation to the standard scenario described above. Chapter 3 provides application notes for the most common of these variations.

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Configuring End-User Packages

If the most recent version of the Administrator's software is not yet installed on your computer, see the *Sun Java System Connector for Microsoft Outlook 7.2 Installation Guide*. The Administrator's software must be properly installed on your computer before you can run the Deployment Configuration Program.

Creating Desktop Installation Packages

Follow these instructions to create a single desktop installation package for a single user, or for a particular group of users who will all install and configure the Connector for Microsoft Outlook in the same way. To create multiple desktop installation packages with a variety of configuration settings for different groups of users, simply repeat this procedure for each package you want to create.

▼ To create an end-user desktop installation package

1   **Locate and launch (double-click) the file** `Admin.exe`**, in** `C:\Program Files\Sun\Deployment Configuration Program\`**, or from a desktop shortcut icon or from the Start program menu.**

The Deployment Configuration Program then opens its Configuration Window on your desktop, as shown in Figure 2–1.
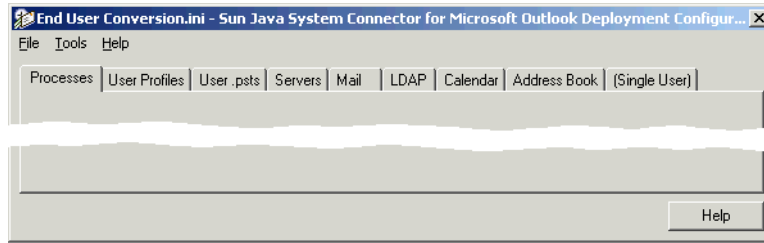
FIGURE 2–1   Deployment Configuration Program: Configuration Window

The Configuration Window contains:

- Nine tabbed panels where you will enter the information to characterize an end user's configuration of the Connector for Microsoft Outlook (described separately below).

- A **Help** button, which opens a separate window of information about the entry options available on the currently displayed panel.

- Three menus: File, Tools and Help.

    The **File Menu** offers several standard, familiar Windows features for file management: New, Open..., Save, Save As..., Print Setup..., Print..., and Exit.

    The **Help Menu** offers context-sensitive access to the online help system that accompanies this Deployment Configuration Program.

    The **Tools Menu** offers a **Create Package** feature that lets you create a new installation package for an existing .ini configuration file that has been opened into this Configuration Window. You may use **File→Open...** to locate and open an existing .ini file.

2   **Complete the information in the nine tabbed panels, as described separately (per tab) below. Click on each tab to display the associated panel.**

    If you begin creating an installation package but then decide to finish it at a later time, you may **File→Save** a partially completed package, and then **File→Open...** it later to resume and complete your work.

3   **When you have entered all of the information requested in all nine tabbed panels, select File→Save to save your configuration choices in an .ini file and create a new installation package. Your Save command activates a standard, familiar Windows Save dialog box.**

4   **In the dialog box: Enter an appropriate path and filename for the .ini file and .exe file, and click the Save button.**

    The **Save** command actually creates two new files: the .ini file, which is saved to whatever folder you designate in the Save dialog box, and an .exe file (the bundled installation package, including a copy of the .ini file), which is saved by default to the same folder where the .ini file is saved. Both the .ini and .exe files carry whatever filename you designate in the Save dialog box.

Troubleshooting   If the program reports a Logon failure or "Could not locate..." a necessary resource while it is running. If you know that the resource exists in the location you have specified, then the administrator account you are using to run this Deployment Configuration Program is not authenticated to the file server where the resource resides. Make sure that you are logged in to the locations of all such resources and then run the Deployment Configuration Program again.

Processes Tab

The Processes tabbed panel is shown in Figure 2–2.
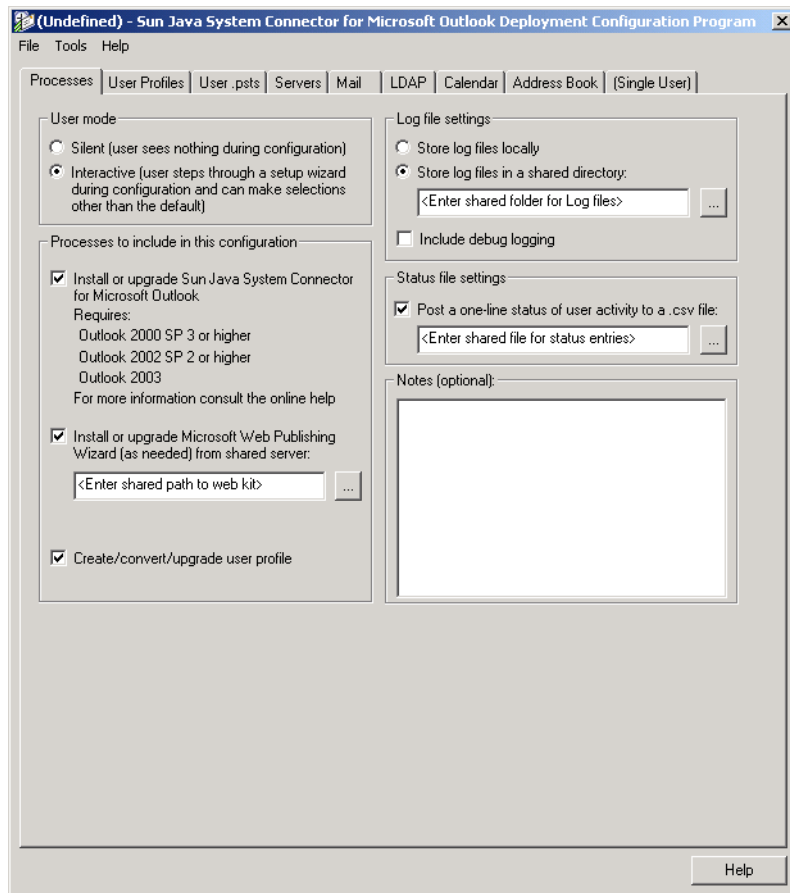
FIGURE 2–2   Deployment Configuration Program: Processes Tab

User mode

These two options, Silent installation vs. Interactive, are mutually exclusive:

Silent: The user program will install and configure the user's software, and convert the existing default Exchange user profile and existing Personal Folders (.pst) files, without any user involvement whatsoever, according to the administrator's pre-set parameters for this process (as set in this and the other tabs in this Deployment Configuration Program).

Interactive: The user program will present the user with at least some choices for the installation, configuration and conversion processes. The extent of user involvement will be as determined by the administrator (as set in this and the other tabs in this Deployment Configuration Program).

Processes to include in this configuration

The installation of these software components to user desktops will require access privileges that often are disallowed to many or most end users. If your network serves "locked-down" Windows environments where end users cannot install software, we strongly recommend a "push" method for software distribution from the system administrator to user desktops that bypasses the requirement for user access privileges. This "push" method of distribution is explained in ""Push" Method Deployment, If End Users Lack Installation Privileges" on page 39.

For a full explanation of any or all of the processes offered in this panel, and the implications of installing or not installing them, please see "Connector for Microsoft Outlook High-Level Architecture" in *Sun Java Communications Suite 5 Deployment Planning Guide* in the *Sun Java Communications Suite 5 Deployment Planning Guide*.

Install or upgrade Sun Java System Connector for Microsoft Outlook. Tells the program to install the software that facilitates the necessary ongoing communications between the user's Outlook client application and the Sun Java System server. If Sun Java System Connector for Microsoft Outlook is already installed, the user program will check the installed version and, if appropriate, upgrade to the newer version.

System requirements for the Sun Java System Connector for Microsoft Outlook include:

- Operating System Windows 2000 (Service Pack 3 or higher) or Windows XP (Service Pack 1 or higher).
- Outlook 2003, or Outlook 2002 with Office XP Service Pack 2 or higher, or Outlook 2000 with Office 2000 Service Pack 3 or higher.
- Microsoft Outlook must be designated as the user's default email client. If Outlook is not set as a user's default email client, see "Designating Outlook as the Default Client" on page 47 resolve this problem.
- The software cannot be installed to any workstation that also contains the Sun Java System Synchronization program (previously known as the Sun ONE Sync program), which is incompatible with Connector for Microsoft Outlook. If the Sun synchronization program has been installed on a particular user's desktop, it must be removed (see "Removing Sun Java System Synchronization" on page 48.

The Sun Java System Connector for Microsoft Outlook Setup Wizard will detect any discrepancy between these requirements and the actual installation environment, and in that case will not install Sun Java System Connector for Microsoft Outlook.

Install or upgrade Microsoft Web Publishing Wizard. Tells the user program to install Microsoft's Web Publishing Wizard (WPW), which makes the user's Free/Busy information available to the Sun Java System Calendar Server. If WPW is already installed, the user program will check the installed version and, if appropriate, upgrade to the newer version. If you mark this checkbox, you must also specify the network location of the installation kit for the Web Publishing Wizard.

Create/convert/upgrade user profile. Activates the User Profiles tabbed panel, so the user program can convert an existing eligible Outlook user profile or create a new profile for use with the new Sun Java System Connector. The user program will convert only an "eligible" profile, meaning that the profile must:

- Include message services of at least one type designated in the User Profiles tabbed panel (in the Converted/upgraded Profile Settings section).
- Not have been fully converted (all of its .pst files converted) by a previous run of the user program (although the remaining, unconverted .pst files of a partially converted profile can be converted).

If this box is *not* marked, the entire User Profiles tabbed panel will be grayed out and unavailable, and no user profile will be converted or created. For example, you may want to create a user installation package to simply install or update MAPI services without converting or creating any profiles.

Log file settings

These settings pertain to the directory where the user program will write its log files for the user's migration session. The first two radio-button options are mutually exclusive:

- Store log files locally: Tells the user program to write its log files to the user's local "temp" directory.
- Store log files in a shared directory: Tells the user program to write its log files to a particular shared directory, which you must specify in the accompanying text box. Use the Browse ("...") button to locate and specify the path, or just type it into the text box. You can enter a drive letter or a UNC path.

  If the Browse feature for Log files does not display the location you need to specify (but you know that it exists): This is an unlikely scenario, but chances are you simply are not authenticated in the domain to which you have browsed. To correct this problem, right-click the target computer and select Explore, and then enter your administrator userID and password at the prompt. You may then return to the Browse feature and select the computer you need to browse.

- Include debug logging: Tells the user program to log its activities in the more verbose, more explicit "debug" style. If a user encounters a problem with the installation package and you can't diagnose the problem by reviewing the default-style log entries, the more verbose debug-style logging may provide enough additional information to help you or your associates solve the problem. This option is off by default.

Status file settings

Post a one-line status of user activity to a .csv file: Adds a one-line summary of user activity to the .csv file you specify in the accompanying text box (below). Each line represents one run of the desktop tool by one user. A single user who runs the tool multiple times should generate multiple lines in the .csv file.

If you mark this checkbox, you must also specify the shared file to which the status lines will be written. Use the Browse ("...") button to locate and specify the path, or just type it into the text box. If the file already exists, it will be updated each time the installation kit is run.

Notes (optional)

Any notes or comments you care to include about this configuration can be entered into this field.

User Profiles Tab

The settings in this User Profiles panel, shown in Figure 2–3, apply only if this package will create or convert user profiles. Therefore, the features in this panel are available only if the Create/convert user profile option is checked on the Processes tabbed panel. This entire User Profiles panel will be grayed out if the Create/convert/upgrade user profile option is unmarked.
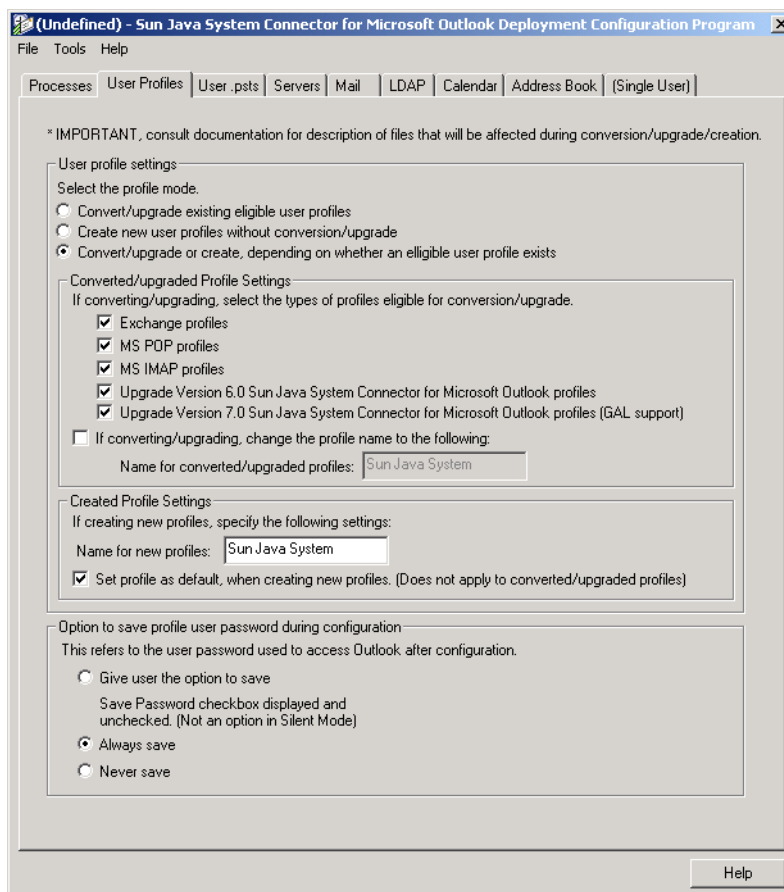
FIGURE 2–3 Deployment Configuration Program: User Profiles Tab

The settings in this panel determine how Exchange users' Contacts, Journal and Notes data will be converted to local (desktop) Sun Java System Connector Personal Folders (.pst) files.

User profile settings

Mark options in this section to specify whether and how user profiles will be converted and created:

- Convert/upgrade existing eligible user profiles: Tells the user program to convert an existing Outlook profile, as follows:

  - **In Silent Mode:** Converts the user's default profile if it can be found, or does nothing if a default profile cannot be found.

- **In Interactive Mode:** Prompts the user to select a single profile to convert if it finds:
  - Two or more eligible profiles connecting to Exchange server(s)
  - Two or more eligible IMAP/POP profiles
  - Any profile of a Connector for Microsoft Outlook before 7.2 without GAL support
  - Only one eligible profile that is not set as the user's default

    If the program finds only one eligible profile, and it is set as the user's default, the program automatically converts that profile without any user interaction. If the program finds no eligible profiles, it does nothing— neither converts nor creates any user profile.

    Remember that the user program will convert only an "eligible" profile, meaning that the profile must include message services of at least one type designated in the Converted/upgraded Profile Settings section of this screen (below), and must not have been fully converted (all of its .pst files converted) by a previous run of the user program (although the remaining, unconverted .pst files of a partially converted profile can be converted).

- **Create new user profiles without conversion/upgrade:** Tells the user program to create a new Outlook user profile, ignoring any existing profiles that may already exist for the user. Note that if a user attempts to run the installation with the same profile name more than once, an error occurs.

- **Convert/upgrade or create:** Tells the user program to convert an existing Outlook user profile if it can find one, or create a new profile if it cannot find an existing one:
  - **In Silent Mode:** Converts the user's default Outlook profile if it can be found, or creates a new profile if a default profile cannot be found.
  - **In Interactive Mode:** Prompts the user to select a single profile to convert if it finds:
    - Two or more eligible profiles connecting to Exchange servers
    - Two or more eligible IMAP/POP profiles
    - Any profile of a Connector for Microsoft Outlook before 7.2 without GAL support
    - Only one eligible profile that is not set as the user's default

      If the program finds no eligible profiles, it creates a new one.

Converted/upgraded Profile Settings

Special Note for Version Upgrade: For any users running this package who are upgrading from Sun Java System Connector version 6 to version 7, the user program will ignore any server-parameter changes that may be entered on the Servers panel— except for the Address Book Server, since it is new in version 7. The program will, however, apply any server-parameter changes to any of the other types of converted profiles. If you want to change any server parameters for users who are upgrading, you should create a separate package for those users and set it to **Create new user profiles ...** (under **User profile settings** above).

- **If converting/upgrading, select the types of profiles eligible for conversion/upgrade:** Checkmark the box(es) that correspond to the profile type(s) that the user program should consider "eligible" for conversion. Remember that an "eligible" profile must include message services of at least one type designated here, and must not have been fully converted (all of its .pst files converted) by a previous run of the user program (although the remaining, unconverted .pst files of a partially converted profile can be converted).

  The "Upgrade Version 7.0 Sun Java System Connector for Microsoft Outlook profiles (GAL Support)" corresponds to the removal of the Microsoft LDAP provider. The new GAL feature replaces Microsoft LDAP. This option does not perform any data migration.

  Note that different types of data associated with different profile types are migrated differently, as shown in Table 2–1.

- **If converting/upgrading, change the profile name to the following:** The name by which the converted profile will be identified in the drop-down list box that appears on Outlook's user logon screen.

TABLE 2–1 Destinations of Migrated Data from Various Sources

Migrating To	Migrating From			
	Exchange	Microsoft POP	Microsoft IMAP	Connector for Microsoft Outlook 6.x
Mail	Not migrated (server data)	SJOC-local.pst	SJOC-local.pst	Not migrated (server data)
Contacts	Address Book Server	Address Book Server	Address Book Server	Address Book Server
Calendar	Not migrated (server data)	Calendar Server	Calendar Server	Not migrated (server data)
Tasks	Not migrated (server data)	Calendar Server	Calendar Server	Not migrated (server data)
Sticky Notes	SJOC.pst	SJOC.pst	SJOC.pst	SJOC.pst
Journals	SJOC.pst	SJOC.pst	SJOC.pst	SJOC.pst

Created Profile Settings

These options apply **only** to new profiles that the user program will create, and not to converted or upgraded profiles.

- **Name for new profiles:** The name by which the new profile will be identified in the drop-down list box that appears on Outlook's user logon screen.

- **Set new profile as default:** If this box is checked, the new profile will be set as the user's default Outlook profile.

Option to save profile user password during configuration

- **Give user the option to save:** Tells the user program to display a checkbox that lets the user choose whether Outlook should prompt the user for a password upon each login, or save ("remember") the password so the user can skip that login step. Within the user program, the instructions displayed with the checkbox explain: "If checked, you will not need to enter your information each time you launch Outlook." This option is not available in any user package configured to run in *Silent* mode.

- **Always save:** Tells the user program to *not* offer the user the choice described above (for **Give user the option...**). Instead, the screen will display this message: Your password will be saved. You will not need to enter your password each time you launch Outlook.

- **Never save:** Tells the user program to *not* offer the password choice, and to configure Outlook to always prompt for the user's password, by default. The user program will display no checkbox or related explanatory text.

User .psts Tab

The settings in this User .psts panel, shown in Figure 2–4, define how the program will save users' Personal Folders (.pst) files. Depending on your choices in other panels in this program, certain sections of this screen may not apply and may appear grayed-out (unavailable) in the display.

The settings in this panel determine hoe Exchange users' Contacts, Journal, and Notes data will be converted to local (desktop) Connector for Microsoft Outlook Personal Folders (`.pst`) files.
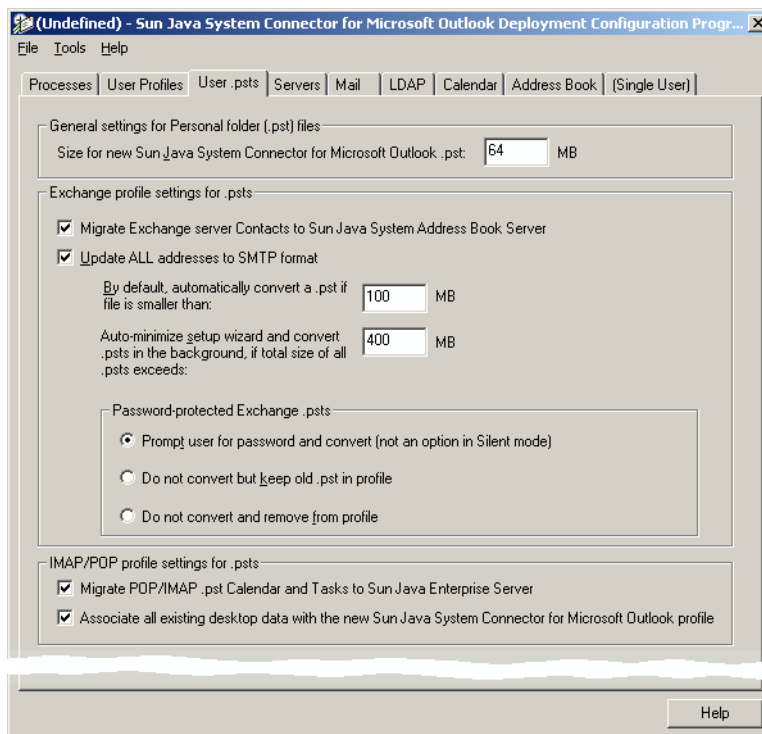
FIGURE 2–4   Deployment Configuration Program: User .psts Tab

General Settings for Personal Folder (.pst) Files

Size for new Sun Java System Connector ... .pst: _____ MB: The expected amount of disk space required for the new `.pst` file into which selected items from the old Exchange server are copied. The user program aborts the conversion if a user does not have this much disk space available. Leave this value set at its default unless you have some particular reason to expect that your `.pst` files will be larger.

Exchange Profile Settings for .pst Files

Migrate Exchange server Contacts to Sun Java System Address Book Server: Tells the user program to migrate the user's Exchange Contacts and copy them to the Sun Java System Address Book Server. If this option is unmarked, no Exchange Contacts will be migrated.

Update ALL addresses to SMTP format: Tells the user program to convert all addresses that occur within Personal Folders (`.pst`) files to SMTP (Internet standard) format.

By default, automatically convert a .pst if file is smaller than: _____ **MB:** In *Silent* mode: The user program will ignore (not convert) any .pst files larger than or equal to the size specified here. In *Interactive* mode: If any existing .pst files are larger than or equal to the specified size, the program will prompt the user to specify which (if any) of the large files to convert.

Auto-minimize setup wizard and convert .psts in the background, if total size of all .psts exceeds: _____ **MB:** This setting is irrelevant in *Silent* mode. In the *Interactive* mode, if the total size of all .pst files to be converted exceeds the size specified here, the user program will convert the profiles first, and then automatically minimize itself to the user's Task Bar to convert the .pst files as a background process. Once the profile has been converted, the user can run Outlook and access the converted profile.

Password-protected Exchange .psts: Choose one of these mutually exclusive options for converting password-protected .pst files:

- **Prompt user for password and convert (not an option in Silent mode):** Tells the user program to prompt the user for the password to open each .pst file and convert it.
- **Do not convert but keep old .pst in profile:** Tells the user program to *not* convert the .pst file, but to keep the unconverted .pst file in the profile.
- **Do not convert and remove from profile:** Tells the user program to *not* convert the .pst file, and to remove the unconverted .pst file from the profile. (The old .pst file is not, however, physically deleted from the user's hard drive.)

IMAP/POP Profile Settings for .psts

Migrate POP/IMAP .pst Calendar and Tasks to Sun Java Enterprise Server: Tells the user program to migrate the user's POP/IMAP calendar data and tasks to the Sun Java Enterprise Server. If this option is unmarked, no calendar data or tasks will be migrated. Note that Contacts are migrated by default, so no settings are needed for Contacts.

Associate all existing desktop data with the new Sun Java System Connector for Microsoft Outlook profile: Tells the user program to associate the user's existing POP/IMAP desktop data with the new Sun Java System profile. If selected, the local .pst file is not deleted.

Servers Tab

The Servers tabbed panel is shown in Figure 2–5.
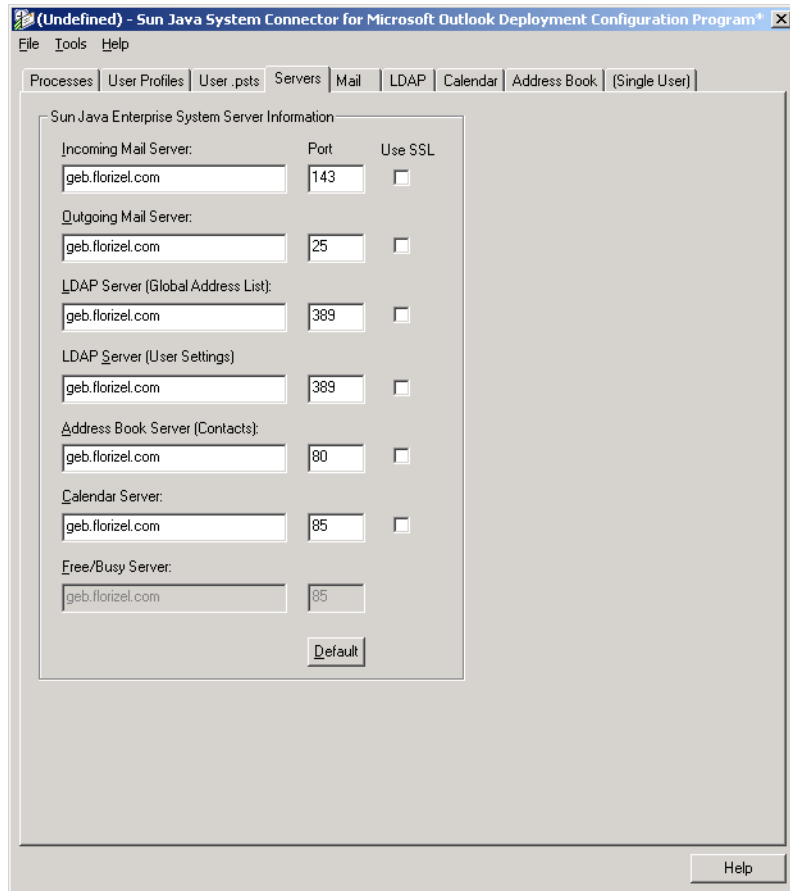
FIGURE 2–5 Deployment Configuration Program: Servers Tab

Server Settings

Server Name: The host name for each Sun Java System server: Incoming Mail (IMAP), Outgoing Mail (SMTP), LDAP (Global Address List and User Settings), Address Book (WABP), Calendar (WCAP), and Free/Busy (WCAP).

Port: The default port number for each server. The default changes if you use SSL to connect to the server.

Use SSL: Mark this box to require an SSL to connect to the associated server.

> **Note –** If the **Use SSL** box is not marked for the Calendar server, the Free/Busy server values will be the same as for the Calendar, and the Free/Busy line will therefore be grayed out in this panel. But if **Use SSL** *is* marked for the Calendar, then you must specify a different port for Free/Busy.

Default: Restores all Port numbers back to their original default values (if you have changed the values but now want to restore the defaults). The default values for SSL vs. non-SSL are different, and this feature will restore the appropriate default for any given server depending on whether the Use SSL box is marked.

Mail Tab

The Mail tabbed panel is shown in Figure 2–6.
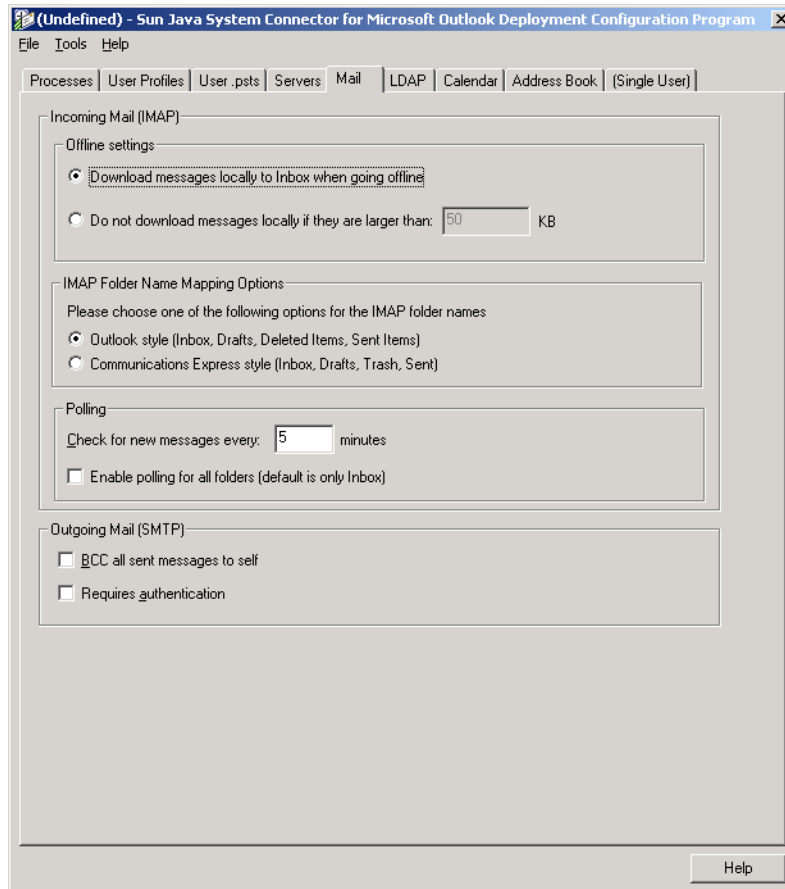
FIGURE 2–6 Desktop Deployment Configuration Program: Mail Tab

Incoming Mail (IMAP)

Offline settings (two options, mutually exclusive):

- **Download messages locally to Inbox when going offline:** Configures mail server to download messages to the user's Inbox when the user goes offline. Alternatively, the user can set the caching status of a given mailbox by highlighting the folder entry in Outlook, then executing the Properties menu, pressing the Mail tab, and turning on the **Cache all message parts (attachments) for this folder** option.

- **Do not download messages locally if they are larger than: _____ KB:** The per-message size limit for the message server's local message cache. This option is intended primarily to reduce download times when the user goes into offline operations. This value, however, will also affect re-display times in online mode, because the message will have to be re-retrieved if it hasn't been cached.

IMAP Folder Name Mapping Options: Select either **Outlook style** or **Communications Express style** to indicate which of these two standards the user program should use to name users' IMAP folders. Your selection here determines which of two map files, `outlook_folders.map` or `uwc_folders.map`, will be used to map users' IMAP folder names. An administrator may, before running this program, edit these files to suit local requirements, as long as the original filenames remain the same.

For more information, and instructions on how to manually define the system folders, see "Mapping System Folders" in *Tuning Communications Express to Work With Connector for Microsoft Outlook*.

Polling:

- **Check for new messages every: ___ minutes:** This is the interval, in minutes, after which a server mailbox will be polled for newly arrived messages. If any new messages have arrived, the mailbox is refreshed and redisplayed in Outlook. If this field is cleared or set to zero, no polling will be done for this server connection.
- **Enable polling for all folders:** Enable this checkbox if you want Connector for Microsoft Outlook to poll all folders, including your Inbox, for unread messages. The default, if this checkbox is not enabled, is to poll only your Inbox. This option can be useful if message filters have been set up to automatically move incoming messages to specific users' folders other than the Inbox, or if the direct delivery to a specific folder option has been enabled.

Outgoing Mail (SMTP)

BCC all sent messages to self: Configures the user software to automatically insert the user's email address into the BCC field of every outbound message (effectively lets a sender file a copy of every message sent). The messages are filed within a sender's server INBOX, and subsequently will be affected by any server-based message filtering rules.

Requires authentication: Tells the user software to configure the SMTP Service so as to require user authentication for outbound SMTP mail.

LDAP Tab

This LDAP tabbed panel, shown in Figure 2–7 , lets you specify the settings for the Sun Java System LDAP Directory Service.
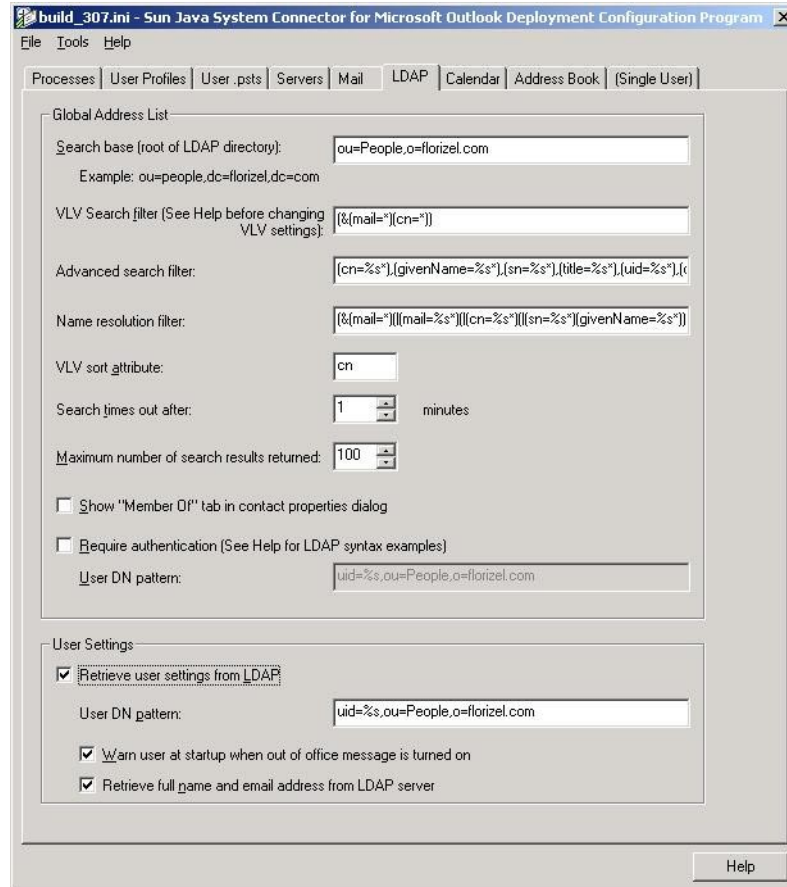
FIGURE 2–7   Deployment Configuration Program: LDAP Tab

Global Address List

The global address list (GAL) is a read-only MAPI Address book for Outlook users to view, search, and extract address information of the users, user groups, and calendar resources stored in the corporate directory. The corporate directory here refers to an LDAP server storing user account information including user name, passwords, contact information, and so on. This

enables other authorized users on the same network to access the information. The Sun Java System Connector for Microsoft Outlook GAL enables Outlook to display the corporate directory as "Global Address List" in conjunction with Contacts, personal address book, and any other address book providers. The GAL provides access to details of individual users, static groups, and calendar resources stored in the corporate directory.

The backend server or the server that is referred to as the corporate directory can be any LDAP address book server adhering to the predefined schema. Here the term user means the individual whose data or information is stored as an entry in the server.

In order to allow browsing of the directory, Connector for Microsoft Outlook utilizes the Virtual List View (VLV) and server-side sort extension of the directory server. The directory server must be configured for the VLV index. The VLV index is precisely defined by a basedn, search filter, sort attribute, and scope. Any mismatch amongst the settings described below and the VLV index settings on the server results in poor performance.

Search base (root of LDAP directory): The LDAP distinguished name of the root of your LDAP directory. Use the pattern specified in the User DN pattern fields.

VLV Search filter: The filter that is used for the VLV to display entries within the directory.

Advanced search filter: Determines what fields are used when searching for users within the GAL. You can change this field if you wish to customize the GAL's Find dialog.

Name resolution filter: Determines which fields to search when entering a name while composing a new message. Outlook tries to resolve the name after pressing Ctrl-K or selecting Tools→Check Names from the menu.

VLV sort attribute: The LDAP sort key for the Global Address List. The default value is cn.

Search times out after: ___ minutes: Limits directory search times to the designated number of minutes.

Maximum number of search results returned: Limits the number of entries returned by a search to the number specified here.

Show 'Member Of' tab in contact properties dialog: Displays the static LDAP groups to which the selected user belongs.

Require authentication: Tells the user program to configure the LDAP Directory Service so as to require user authentication in the form of a user Distinguished Name (DN) for each directory query.

User DN pattern: The elements of the user's Distinguished Name that, when assembled, will form the complete DN to authenticate the user's identity to the LDAP Directory Service (if authentication is required).

The recognized keywords for the DN pattern are:

- `%s` — the full user id.

- `%user` — the left part of the user id (left of the @ symbol) if the user id includes the domain (for example, `john@florizel.com`). If no @ symbol appears in the user id, the full user id is used.

- `%domain` — the right part of the user id (right of the @ symbol) if the user id includes the domain.

For example, to define a DN consisting of a user ID (uid), an organization unit (ou) and an organization (o): `uid=%s,ou=people,o=florizel.com`. The user's ID replaces `%s` after configuration of the user's profile.

If, for example, the user ID includes the domain (`john@florizel.com`), the DN pattern is: `uid=%user,ou=people,o=%domain,o=isp`. This will be replaced with `uid=john,ou=people,o=florizel.com,o=isp`.

Similarly, to define a DN consisting of a common name, an organization and a country: **cn=Fred Smith,o=florizel.com,c=US**.

User Settings

The user settings are used to extract information about the user. This information can be used to determine "out of office" settings and how the user's name and email address is displayed when sending email.

Retrieve user settings from LDAP: Enable this checkbox if you want your user settings extracted from LDAP.

User DN pattern: The elements of the user's Distinguished Name that, when assembled, will form the complete DN to authenticate the user's identity to the LDAP Directory Service (if authentication is required). Use the pattern specified for the User DN pattern field for the Global Address List.

Warn user at startup when out of office message is turned on: If this checkbox is enabled, a dialog box appears when Outlook is started warning the user that the out of office message is turned on. The user can choose to turn off the out of office message with this dialog.

Retrieve full name and email address from LDAP server: Enable this checkbox if you want the display of your name and email address updated from the LDAP server.

Calendar Tab

The Calendar panel is shown in Figure 2–8.
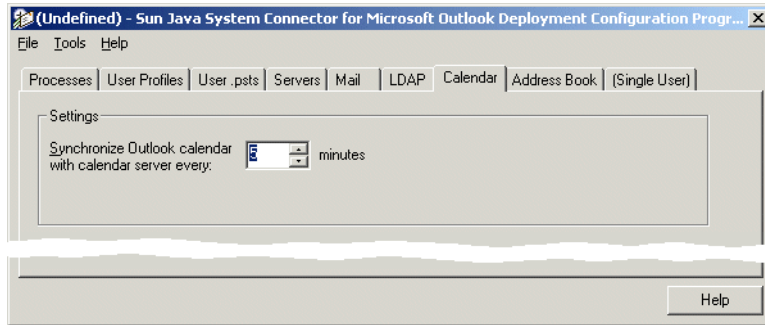

FIGURE 2–8 Deployment Configuration Program: Calendar Tab

Calendar Settings

Synchronize Outlook calendar with calendar server every: ___ minutes: Specifies how often the Outlook calendar will synchronize with the calendar server.

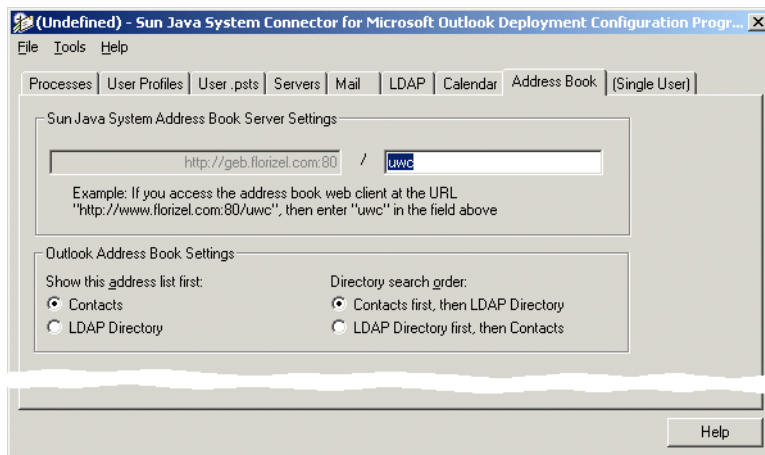# Address Book Tab

The Address Book panel is shown in Figure 2–9.

FIGURE 2–9 Deployment Configuration Program: Address Book Tab

Sun Java System Address Book Server Settings: Enter the portion of the address book web client URL that follows the domain root and a delimiting slash character. The root value appears in the grayed-out text box to the left of this value, drawn from your **Address Book Server** entry on the Servers panel.

Outlook Address Book Settings:

- **Show this address list first:** Select **Contacts** or **LDAP Directory** (mutually exclusive) to indicate which of these two should appear first in the user's Outlook Address Book.

- **Directory search order:** Select **Contacts first ...** or **LDAP Directory first ...** (mutually exclusive) to indicate how Directory searches should proceed.

Single User Tab

The Single User tabbed panel, shown in Figure 2–10, lets you specify and authenticate the identity of a single specific user. This panel applies *only* if you are creating an installation kit for one particular user— e.g., for your CEO, or for some other user whose unique circumstances warrant a more customized configuration.
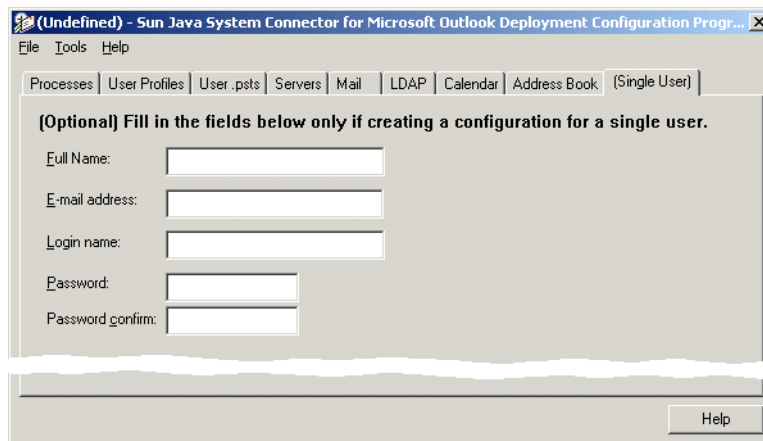

FIGURE 2–10   Deployment Configuration Program: Single User Tab

Full name: The "friendly" name associated with the user's email address. When sending messages, this name appears in the From box of the user's outgoing messages.

E-mail address: Specifies the email address that people should use when sending mail to the user at this account— must be in the format `name@florizel.com`.

Login name: Specifies the user's account name, which must be the same value for both the IMAP and calendar servers. This is often the same as the part of the user's email address to the left of the "at" sign (@).

Password: The user's account password, which must be a single shared password used for both the IMAP and calendar servers.

Password confirm: A duplicate field for the user's account password, required as a precaution against typographical errors. (This value must match the **Password** value above.)

3

Application Notes for Special Circumstances

The chapter explains how to deploy Sun Java System Connector for Microsoft Outlook under certain special circumstances or network configurations.

"Push" Method Deployment, If End Users Lack Installation Privileges

The Deployment Configuration Program lets an administrator create installation packages that end users can run to install and configure their own local desktop copies of the Connector for Microsoft Outlook software. Software installation, however, requires access privileges that often are disallowed to many or most end users. Most enterprises therefore implement a "push" method for software distribution from the system administrator to user desktops that bypasses the requirement for user access privileges. If your network serves "locked-down" Windows environments where end users cannot install software, we strongly recommend this sort of automated configuration management as a way to avoid many individual desktop visits.

This section describes a "push" method for distributing the Sun Java System Connector for Microsoft Outlook to user desktops using Microsoft's SMS administration tools. Remember that the Deployment Configuration program can prepare desktop installation packages that both install the Connector for Microsoft Outlook software and convert existing Outlook profiles and data files for use with the new software. If your users had sufficient administrator privileges to install new software on their own desktops, you could prepare a single installation package that would perform both the installation and conversion functions in a single pass. But if the user who runs the installation package lacks the administrator privileges to install software, then the installation portion of the package would be unable to run and the conversion would fail.

When users cannot install their own software, we have to separate those two tasks so that the installation function can be facilitated separately by an SMS installation package. The SMS installation package can then be run on each user desktop by a local SMS account that has full

administrator rights, and is therefore authorized to install new software on the local desktop. After the necessary software for the Connector for Microsoft Outlook has been installed, we use the Deployment Configuration Program to prepare a second installation package to convert any existing Outlook profiles and data files for use with the new Connector for Microsoft Outlook.

The conversion functions will convert any existing Outlook profiles and data files associated with the specific user who is running the desktop installation program. But the SMS account that will run the first installation package is a generic account, with administrator privileges so that it can install software, but not associated with any particular user. The installation tasks and conversion tasks must therefore be performed by two separate installation packages, because the generic SMS account necessary to physically install the software lacks the user specificity necessary to convert a user's existing profile and data files.

A typical SMS "push" scenario consists of the five steps detailed below.

▼ To Deploy the Push Method

1   Prepare the necessary shared folders.

Create three new shared directories, named LOGS, SJSC, and WPW, on a computer that is part of the same SMS site as the end-user desktops. The nature of Windows NT local accounts requires that you assign full control share permissions for all three folders for the SMSCliToknLocalAcct$ account, as shown in the Permissions window (left) in Figure 3–1 below.

These assignments will provide the necessary read/write access to these directories for the SMS local account (which requires a password), and lets you avoid having to open the system to guest access. Also, assign full control permissions for all three of the NTFS folders to SMSCliToknLocalAcct$, as shown for the LOGS folder in the Properties window (right) in Figure 3–1.
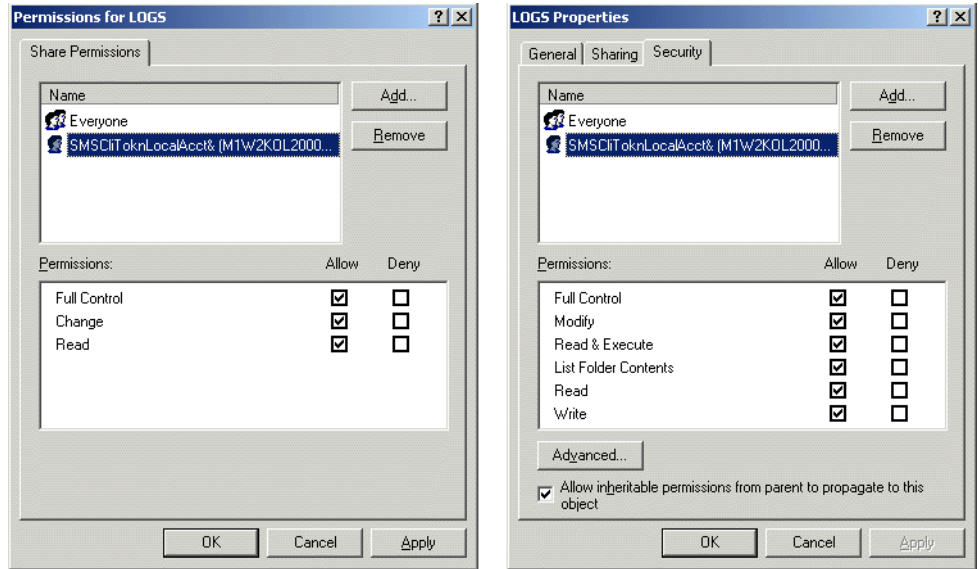
FIGURE 3–1 Permission Settings (left) and Properties (right) for the LOGS Shared Folder

2 Prepare an installation package to install the necessary software.

Use the Sun Java System Connector Deployment Configuration program (Admin.exe) to create an installation package that will *only* install the necessary software to each user's desktop, but *not* convert existing Outlook profiles and data files. The Admin.exe program is described inChapter 2, but note these special requirements, on the Processes tab, for preparing this package for SMS distribution:
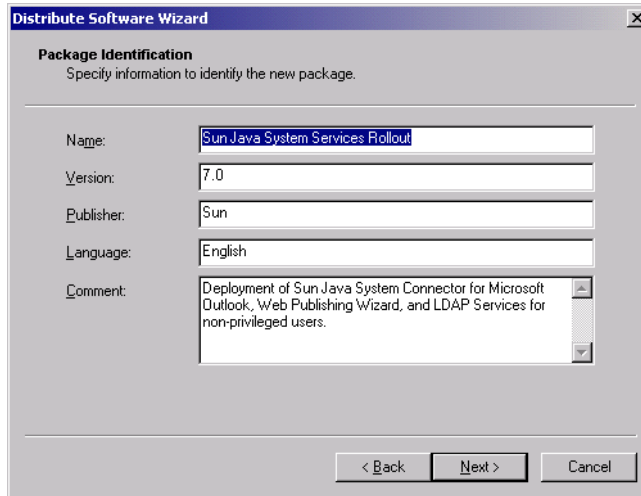
- Be sure the **User mode** is set to **Silent**.
- Be sure to *un*check the option to **Create/convert/upgrade user profile**.
- Use UNC paths (\servername\sharename) for all three of the path fields.

3 Push the first installation package to user desktops via an SMS installation package.

Use Microsoft's SMS Packaging Wizard to prepare an installation package that will contain the Sun Java System Connector installation package you created in step 2, and then "push" the package to run automatically on user desktops— without any user initiative or interaction.

a. Launch the SMS 2.0 Management console. Right-click on the collection to which you want to push the Connector for Microsoft Outlook, and click Distribute Software. SMS then launches its Distribute Software Wizard.

b. On the Distribute Software Wizard's Welcome screen: Click Next to begin.

c. On the Package screen: Click the option to Create a new package and program, and click Next.

    d. On the Package Identification screen: Enter the appropriate values as shown in Figure 3–2, and click Next.

FIGURE 3–2   SMS Distribute Software Wizard: Package Identification

    e. On the Source Files screen: Select Create a compressed version of this source, and click Next.

    f. On the Source Directory screen: Click the Browse button to locate and specify the directory where the Connector for Microsoft Outlook installation package was created, as shown in Figure 3–3. The path specification can be either local or UNC. When you have specified the correct path, click Next.
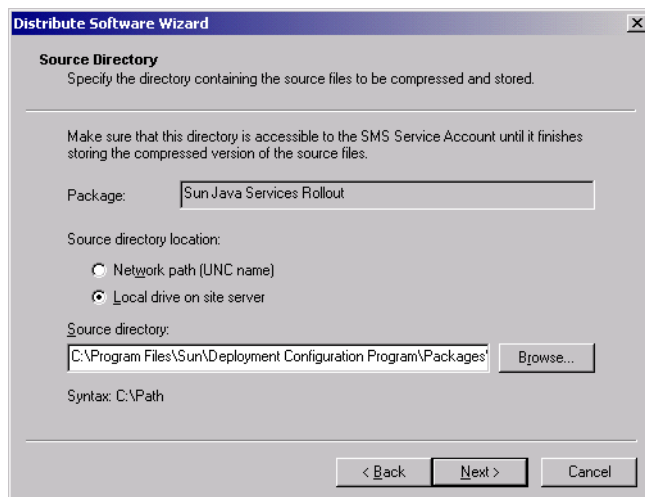
FIGURE 3–3 SMS Distribute Software Wizard: Source Directory Screen

g. **On the Program Identification screen: Click the Browse button to locate and specify the name of the program** .exe **file for the Command line, and click Next.**

h. **On the Program Properties screen: Make sure the program will Run with administrative rights, and click Next.**

i. **Specify whether and how you want to advertise the program on the next five screens, titled: Advertise a Program, Advertisement Target, Advertisement Name, Advertise to Sub collections, and Advertisement Schedule. As you enter your choices, click Next to advance to each next screen.**

j. **On the Assign Program screen: Select Yes to assign the program, specify the date and time of assignment, and click Next.**

k. **On the Completing... screen: Review your settings for the creation of this installation package. You may use the Back button to go back and change any settings now, before you actually create the package. When the settings appear as you want them, click Finish to create the package, which will then be pushed to user desktops according to the Assignment and other parameters you have specified in this Wizard.**

   A user's Advertised Programs Monitor will report the package as shown in Figure 3–4.
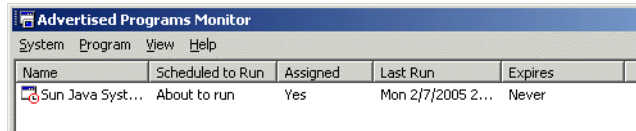
FIGURE 3–4 A User's Advertised Programs Monitor

In any case, every user will be alerted to the imminent run of the package by a Countdown dialog box, as shown in Figure 3–5.
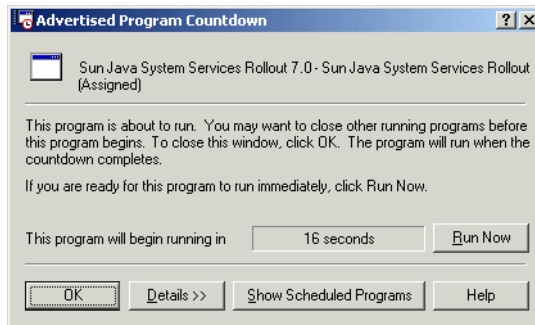

FIGURE 3–5 A User's Countdown Dialog Box

Because the desktop installation program (desktop.exe) will be run by the SMS administrator program, as a local user, access to network shares will require a password, even if the shares are made available to the group "everyone." If the network denies access to log directories and install directories during a user run of the installation package, enable guest access on the computer hosting the log files and installation media, to allow the local account from one system to access the data from another system.

4   **Prepare a second installation package to convert existing Outlook profiles and data files.**

Use the Sun Java System Deployment Configuration program (Admin.exe) to create a second installation package for the Connector for Microsoft Outlook— this time to *only* convert any existing Outlook profiles and data files for use with the new Connector for Microsoft Outlook software. The Admin.exe program is described in Chapter 2, but note these special requirements in the Processes tab for preparing this package:

- Set the **User mode** to **Interactive**.

- Under **Processes to include in this configuration** :

  - Be sure that none of the Install or upgrade... options is marked.
  - Mark the **Create/convert/upgrade user profile** option.

5 **Push the second installation package to user desktops via an SMS installation package.**

Use Microsoft's SMS Packaging Wizard to prepare another SMS installation package—this one to contain the Sun Java System installation package you created in step 4. Use the same settings you used in step 3 above to prepare the first SMS installation package, except for these differences on the Program Properties screen:

- **Program can run**: Select the option **Only when a user is logged on**.
- Mark the **User input required** option, and be sure that **Run with administrative rights** is *un*marked.

This final SMS package will require some user interaction, to reply to password prompts, but will not require administrator privileges since this package does not install any new software to the desktop. The passwords will authorize the conversion program's access to password-protected Outlook Personal Folders (.pst) files.

Alternatively, this step 5 can be accomplished by running the installation package from the command line, with an SMS script, as explained below under "Command-Line Switches for the User Installation Package" on page 45

Command-Line Switches for the User Installation Package

Step 5 of the "push" method described above (see ""Push" Method Deployment, If End Users Lack Installation Privileges" on page 39) can also be accomplished by running the installation package from an SMS script, with command-line switches to pass the necessary user passwords to the conversion program as it runs. This would make possible a truly silent installation and configuration, requiring no user interaction whatsoever.

For example, you might create an SMS package that runs a conversion package, and have the SMS services issue the following commands when it is run:

```
DT_Package.exe
    /USERNAME=bcarpenter
    /FULLNAME="Burns Carpenter"
    /EMAILADDRESS="burns.carpenter@florizel.com"
    /DN="uid=bcarpenter,ou=people,o=florizel.com,o=florizel.com"
```

Note – This and other command-line samples are formatted here for ease of reading, but all of the switches must be typed in one continuous string— which is likely to wrap to multiple lines of its own accord.

You could then substitute environment variables for the users (assuming that the NT usernames and the Sun usernames match):

```
DT_Package.exe
    /USERNAME=%username%
    /FULLNAME="Change This"
    /EMAILADDRESS=%username%@florizel.com
    /DN=uid=%username%,ou=people,o=florizel.com,o=florizel.com
```

This command-line approach would permit a silent (or minimally interactive) installation from SMS, which would probably generate far fewer Help desk calls than asking users to click a link in an email and requiring users to enter data.

The installation package will support these command-line switches:

- /USERNAME=*xxx*, where *xxx* is the username on the Sun servers.
- /FULLNAME=*xxx*, where *xxx* is the display name of the user.
- /EMAILADDRESS=*xxx*, where *xxx* is the email address of the user.
- /DN=*xxx*, where *xxx* is the user DN on the Sun servers.
- /NEWPROFILENAME=*xxx*, where *xxx* is the name of the created profile.
- /SAVEPASSWORD=*n*, where *n* = 1 (save) or 0 (don't save).
- /ALTPSTDIR=*dir*, where *dir* is the directory where the local cache is created. If this switch is not present, the default value is `Documents and Settings\%username%\Local Settings\Application Data\Sun\Outlook Connector`

These switches will be useful if you are converting an Exchange profile:

- /OLDDOMAIN=xxx, where *xxx* is the Exchange domain
- /OLDUSERNAME=xxx, where *xxx* is the Exchange user name

Migrating Terminal Service Users from Exchange to the Sun Java System

The Connector for Microsoft Outlook administrator's tools can also be used to migrate existing Outlook users of Windows terminal service from Exchange to a Sun Java System server. The method described below assumes the following environment:

- Windows 2000 Server with Terminal Services.
- Office 2000 installed with Terminal Services install file from Office 2000 Resource Kit CD (ORK) onto the Windows server.
- Outlook 2000 configured as the default mail client.

▼ To Migrate Terminal Service Users from Exchange to Sun Java System

1 **Prepare the server.**

   Log onto the server's local console as an administrator, and configure Outlook to be the default mail client (if it is not already). Then install Web Publishing Wizard and the Connector for Microsoft Outlook.

2 **Create an appropriate desktop installation package.**

   Use the Deployment Configuration Program to create a desktop package that does *not* install any services, but simply converts profiles from Exchange to Sun Java System services. (If the user has been in a non-Exchange environment, there will be no profile to convert, so you must configure the desktop package to create a new Sun Java System profile instead.)

3 **Update the user's desktop.**

   Log on to a terminal session as a regular user, and run the desktop installation package that you created in step 2 above— that only converts or creates a user profile, but does not attempt to install or update any services. Then open Outlook and verify that the conversion is complete.

Designating Outlook as the Default Client

Sun Java System Connector for Microsoft Outlook can be installed only at workstations where Microsoft Outlook is set to be the default email client. If Outlook is *not* set as a user's default email client, the Setup Wizard will not install the software, and will prompt the user to correct the problem and run the Setup Wizard again.

▼ To Designate Microsoft Outlook as a User's Default Email Client

1 **Open the 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 E-mail pull-down menu.**

5 **Click OK.**

Removing Sun Java System Synchronization

The MAPI services for the 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 Sun ONE Sync program). If one of these Sun synchronization programs is installed on a user's workstation, the Setup Wizard will notify the user of the problem (in an error message after the Welcome screen), and prompt him or her to acknowledge the notice and exit the program. The user may then rerun the Setup Wizard after the synchronization program has been removed.

▼ To Remove a Synchronization Program from a User's Workstation

1 **From the Start menu: Select the Uninstall... option for the program you want to uninstall. Choose one of:**

- **Programs→ Sun Java System Synchronization→Uninstall Sun Java System Synchronization**

- **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 a Palm device, WinCE device or Pocket PC device with Outlook, we strongly recommend that users use the sync software distributed with their devices, rather than the Sun synchronization software. Changing to the sync software distributed with a device may require uninstalling and reinstalling the Palm Desktop software.

If a user wants to continue using the Sun synchronization software to sync to the data of the other device, he or she can reinstall the software, but *not* select the checkbox for the Microsoft Outlook 98/2000 translator during the installation.

Undoing (Reversing) a User's Migration

To abandon a user's connection to the new Sun Java System server and restore the user's mailbox to service with the old Exchange server:

▼ To Reverse a User's Migration

1 **Delete the profile "**Xxx (old)**."**

2 **Copy the profile "**Xxx**" to "**Xxx Sun**" — or some other name, like "**Xxx (new)**," etc.**

3 **Delete the profile "**Xxx**."**

4 **Copy the profile "**Xxx (Backup)**" to "**Xxx**."**

5 **Delete the profile "**Xxx (Backup)**."**

6 **Determine where the** .pst**'s are located by viewing Properties on the profile.**

There is no standard location for .pst files, so the only reliable way to find them is to open the profile (now named "Xxx") and, for each .pst service, click on Properties and note the path.

7 **For each pst file: Rename** Yyy.pst **to** Yyy.new**, and rename** Yyy.bak **to** Yyy.pst**.**

8 **Determine where the** .pab**'s are located by viewing Properties on the profile.**

There is no standard location for .pab files, so the only reliable way to find them is to open the profile (now named "Xxx") and, for each .pab service, click on Properties and note the path.

9 **For each pab file: Rename** Zzz.pab **to** Zzz.new**, and rename** Zzz.bak **to** Zzz.pab**.**

The Yyy.bak and Zzz.bak files will be in the same directory.

To remove the Sun Java System profile and leave the Exchange profile resident on the system, skip step 2 (and combine steps 1 and 3).

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