



Sun Java System Connector for Microsoft Outlook 7 2005Q4 Deployment Planning Guide

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Preface

This guide describes the deployment of Sun Java™ System Connector for Microsoft Outlook. This guide is intended to help understand your deployment choices and options before using the Sun Java System Connector Deployment Toolkit—a collection of software tools for system administrators designed to install and configure the Sun Java System Connector for Microsoft Outlook for individual 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 the Connector for Microsoft Outlook software and that you have a general understanding of the following:

- The Internet and the World Wide Web
- Messaging Server and Calendar Server protocols
- System Administration and Networking on the following platforms:
 - Microsoft Windows 2000
 - Microsoft Windows XP
- Microsoft Outlook

- General Deployment Architectures

How This Book Is Organized

This book contains the following chapters:

[Chapter 1](#) introduces the deployment process and the components of the deployment toolkit.

[Chapter 2](#) describes the guidelines to the deployment process.

[Chapter 3](#) discusses any issues that you may encounter during the deployment process.

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
<i>Sun Java System Connector for Microsoft Outlook 7 2005Q4 Deployment Planning Guide</i>	(This guide) Describes the administrator's process and strategies for deploying Connector for Microsoft Outlook to user desktops.
<i>Sun Java System Connector for Microsoft Outlook 7 2005Q4 Installation Guide</i>	Describes how to install the administration software that helps an administrator deploy Connector for Microsoft Outlook to user desktops.
<i>Sun Java System Connector for Microsoft Outlook 7 2005Q4 Administration Guide</i>	Describes the administrator's deployment configuration program for the Connector for Microsoft Outlook.

TABLE P-1 Books in This Documentation Set (Continued)

Book Title	Description
<i>Sun Java System Connector for Microsoft Outlook 7 2005Q4 User's Guide</i>	Explains how to install, use and configure the Connector for Microsoft Outlook on your desktop. This guide also describes the user interface.
<i>Sun Java System Communications Services 2005Q4 Release Notes</i>	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.

Related Books

For other server documentation, go to the following:

- Sun Java System Messaging Server documentation (<http://docs.sun.com/coll/1312.1>)
- Sun Java System Calendar Server documentation (<http://docs.sun.com/coll/1313.1>)

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 <code>.login</code> file. Use <code>ls -a</code> to list all files. <code>machine_name% you have mail.</code>
AaBbCc123	What you type, contrasted with onscreen computer output	<code>machine_name% su</code> Password:

TABLE P-2 Typographic Conventions (Continued)

Typeface	Meaning	Example
<i>AaBbCc123</i>	A placeholder to be replaced with a real name or value	The command to remove a file is <code>rm filename</code> .
<i>AaBbCc123</i>	Book titles, new terms, and terms to be emphasized (note that some emphasized items appear bold online)	Read Chapter 6 in the <i>User's Guide</i> . <i>A cache</i> is a copy that is stored locally. Do <i>not</i> 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.	<code>ls [-l]</code>	The <code>-l</code> option is not required.

TABLE P-4 Symbol Conventions (Continued)

Symbol	Description	Example	Meaning
{ }	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.

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To access the following Sun resources, go to <http://www.sun.com>:

- Downloads of Sun products
- Services and solutions
- Support (including patches and updates)
- Training
- Research
- Communities (for example, Sun Developer Network)

Third-Party Web Site References

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

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Introduction and Overview

This Guide was developed to help you, the system administrator, understand and plan for the deployment of the Sun Java System Connector for Microsoft Outlook to the end users in your organization. The deployment process can proceed along many 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 can and should be involved in the process of installing and configuring their own desktop software.

Your organization will use Sun Java System Connector software so that your users can use Microsoft Outlook as their email and calendar client while connected to Sun Java System servers. The Connector software must be installed and configured for each of your desktop users to facilitate the necessary ongoing communications between Outlook and the Sun Java System server. Sun also provides a Desktop Deployment Toolkit, a collection of software tools for system administrators designed to simplify both the administrator's work and the user tasks associated with installing and configuring the Sun Java System Connector software for individual users.

The Desktop Deployment Toolkit lets the administrator create customized end-user installation packages for the Connector software, with preset 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 preset 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 his or her desktop according to the administrator's specifications.

As you plan for your deployment and use the Deployment Toolkit to prepare installation packets for your users, you will find many choices available for how the new software will be distributed, installed and configured on individual user desktops. Some of your choices will be dictated by logistical imperatives, while other choices will be derived from your personal familiarity with your organization, your network, and your users.

This Guide is intended to help you anticipate these choices, and explain the significance and implications of your options before you start using the Deployment Toolkit.

Why Use the Deployment Toolkit?

With the Deployment Toolkit, an administrator can control a wide range of configuration parameters for desktop users. Mandating many or most configuration settings will bypass the need for users to ponder options, make choices and set values themselves. These automated or semi-automated installations will spare the corporate help desk many calls for guidance, support, and solutions to the inevitable problems that arise when user choices produce unexpected results. Overall, the toolkit substantially reduces the cost, time and effort required to deploy the Sun Java System Connector software.

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

If your organization is migrating from Microsoft Exchange, the user's installation packages will also preserve the considerable value of their existing Outlook data stored in .pst files on user desktops, as well as their Notes, Journals and Contacts stored on the Exchange server. The bundled installation packages include a conversion utility that quickly converts all such data to pure Internet addresses, so users will be able to reply to older messages, appointment invitees will receive change notices, and address books and personal distribution lists will remain serviceable after your migration to the Sun Java System server.

Deployment Process Per Desktop: Three Tasks

Deployment of the Sun Java System Connector software to each user desktop requires three distinct tasks:

- **Installation:** The necessary and appropriate software must be physically installed to the Outlook user's desktop. Software installation requires access privileges that often are disallowed to many or most end users. In this case, most enterprises implement 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 more detail in “Desktop Installation Methods” on page 18.) 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.

- **Configuration:** The Sun Java System Connector is installed with an assortment of configuration parameters including the server names and port numbers, user password options, directory search defaults, the log file path, and so forth. While users or administrators can manually configure these settings within Outlook at each desktop, it is far more efficient for administrators to pre-configure these for groups of users and avoid desktop visits.
- **Conversion:** The desktop Setup Wizard can convert Exchange users’ Contacts, Journal and Notes data to local (desktop) Personal Folders (.pst) files for the Sun Java System Connector. Any such existing personal data files associated with Microsoft Exchange and Outlook must be converted to be compatible with the Sun Java System server and Connector software. (This task does not apply to new email users who were not previously working with Microsoft Exchange.) If a user has password-protected his or her data files, these conversions will require the password associated with the protected files. The conversion function is processor-intensive and may run on the user’s computer for many minutes or even hours if a user has large amounts of data to convert. For this reason the conversion utility lets a user defer the conversion of larger files to a later time, such as during a lunch break or even overnight.

The Deployment Configuration Program lets a system administrator create installation packages that will automate some or all of these tasks for end users, depending on the administrator’s deployment strategy for any particular group of users.

Deployment Toolkit Components

The Sun Java System Connector Desktop Deployment Toolkit consists of these components:

- **Deployment Configuration Program:** Sun’s tool that lets system administrators create bundled, customized installation packages for end users. These packages can then install and configure the Sun Java System Connector software and, if appropriate, convert data from Exchange local stores.
- **Sun Java System Connector Setup Wizard:** Sun’s tool that lets end users install the Sun Java System Connector software, configure its operations and features based on the administrator’s settings, and convert existing Outlook data files (.pst files) associated with Exchange into a form that the Sun Java System Connector can use. (The Setup Wizard is one part of the bundled end-user installation package created

by the Deployment Configuration Program, as described above.)

- **Sun's Install kit (MSI) for the Sun Java System Connector:** Sun's installation utility for the software that facilitates ongoing, permanent communications between Microsoft Outlook features and the Sun Java System server. This is supplied as part of the package from Sun.
- **Special Kits for using Microsoft System Management Services (SMS) to install the Sun Java System Connector:** Sun utilities that support the "push" functionality of Microsoft's SMS to let a system administrator distribute and install the Sun Java System Connector desktop components to user desktops with minimal or no user involvement. This "push" method of distribution is explained under "[Desktop Installation Methods](#)" on page 18

In addition to the above-listed components of the Deployment Toolkit, the **Microsoft installation program for Web Publishing Wizard (WPW)** (available from other vendors) may be necessary for your users to install the Sun Java System Connector for Microsoft Outlook.

Microsoft's WPW is a tool used to generate HTML-coded documents, typically in the form of web pages to be viewed in a web browser. But WPW can also be used to "publish" information for other purposes—to create documents containing certain types of data and upload the documents to locations where other applications can find them and extract the pertinent data. The Sun Java System Connector uses WPW this way to facilitate the transfer of users' free/busy data between Outlook and the Sun Java System server, and WPW therefore is a necessary intermediary and a required component of every user's installation of the Sun Java System Connector.

Note – The WPW, however, is not included in the Deployment Toolkit package because it is a Microsoft product, so you must obtain the Web Publishing Wizard from Microsoft. The installation program for Microsoft's WPW is available as a free download from <http://www.microsoft.com>.

General Guidelines

Unless the scale of your migration is limited to only a handful of users, we strongly recommend that you plan to migrate incrementally, in groups, and prepare a comprehensive Deployment Plan to articulate your migration strategy.

Plan to Migrate Incrementally, in Groups

While small companies may be able to migrate all users to a new server in a single weekend or migration event, most medium and large companies will need to perform their migrations in “batches.”

Even a seamless transition will generate calls to your corporate help desk from some percentage of users, and your help staff would much prefer handling just a handful of these calls per day, distributed over several days. Migrating your universe of users incrementally, by subset groups, should substantially distribute your help desk’s load.

Moreover, your organization may have good business reasons to avoid scheduling all users in a single migration event. For example, finance and accounting staff cannot tolerate an interruption at the beginning of a month when they are trying to close the books. Likewise, sales staff should not be interrupted near the end of the quarter when they are striving to meet their quotas, and marketing people need to avoid interruptions near key trade shows or other programs. Migrating users in batches provides flexibility in accommodating these legitimate business needs.

Many organizations designate information-services staff as the first group to migrate, since they typically are the most sophisticated users and therefore provide a solid test of the migration methodology and new system.

Finally, remember that the Deployment Configuration Program lets you configure your users' installation processes differently for different groups of users. Presumably you will want to monitor your users' installations, at least passively, and this will be much easier to do by groups of users who share certain qualities and configuration parameters.

Prepare a Comprehensive Deployment Plan

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. Halfway through your deployment is no time to discover that a neglected detail has cost your organization several hundred hours of user productivity, or unnecessary aggravation for your users.

Your Deployment Plan will be an internal document, and as such may be as full of undefined jargon and acronyms as you like. But at a minimum your Plan should accommodate all of the issues identified in this Guide, in [Chapter 3 Engaging professional services](#) experienced in messaging migration may prove very beneficial.

Issues to Address in Planning for a New Mail Server

This section explains topics that should be addressed in the planning for every migration project.

Characterize Your Site Configuration(s) and Users

Are your users all in one physical, geographic location—all in one building? All on one floor? In one room? Or do you have a global headquarters in St. Louis, branch administrative offices in Tangiers, Barcelona and Oshkosh, and factories in Singapore and Tuscaloosa? In your current email system, how many Exchange servers and users are at each location? After you migrate, how many Sun Java System servers will serve the users at each location?

In your current email system, how are your users assigned to your various Exchange servers? By geography only? By administrative entities within your organization—for example, the Sales Department vs. the Engineering Department vs. Customer Service and so forth? Or by business unit or team—for example, the Product XYZ team vs. the Product ABC team?

What are the education and training backgrounds of your various users? How long have they been working with computers? To what extent are they likely to require administrator or help-desk “hand holding” during the migration?

User Grouping Criteria and Implications

Determine the optimum number of your users to migrate at a time. Your optimum migration group size will depend in part on the volume of data per user on the server. Migration group size should be correlated to the size and availability of your enterprise help desk, since you can assume that at least some percentage of users will call the help desk for assistance.

Your first few migration groups should be smaller than your expected optimum size, since these first groups will likely expose any unforeseen issues with documentation, your communication plan, and so forth before a larger group would generate correspondingly larger consequences. The first few smaller migration groups will also help you predict the demand on your organization's help desk upon the later migration of larger groups.

Finally, it is usually helpful to migrate users in logical groups, related by business function or by administrative entity or proximity, so they can support one another through the process.

Desktop Installation Methods

The Sun Java System Connector Deployment Toolkit contains a variety of deployment options with operational options that permit considerable flexibility in devising and implementing a suitable migration strategy for most any environment, circumstances and administrator preferences. The topics below describe the most common scenarios, and explain how Sun's migration tools accommodate them.

Interactive User Installation (Self-Service)

The Sun Java System Connector Setup Wizard is designed to be straightforward for end users to run by themselves. The Setup Wizard can be placed on a file server, so it need not be individually installed on end-user workstations. However, the physical installation of the Java System Connector software on user desktops requires access privileges that often are disallowed to many or most end users. If any of your end users do not have installation privileges for their own desktops, you may choose either of the following strategies:

- Visit each user's workstation and use your own administrator privileges to physically install the software to the user's desktop.

- Use a configuration management tool, such as Microsoft's SMS, to "push" the software to multiple users' desktops (explained below in ["Automated "Push" via SMS or Other Configuration Management Tools"](#) on page 19).

After the software has been physically copied to a user's desktop, the user can run the Setup Wizard to configure the software and convert existing Personal Folders (.pst) files.

End users who run the conversion program will provide their own credentials for the Sun Java System servers. This method therefore permits conversion of password-protected .pst files (see ["Password-Protected Personal Stores in Outlook"](#) on page 23 below), and lets users specify which of their personal stores should be converted for use with the new Sun Java System Connector software. (Users can read unconverted email messages, but cannot reply to them because unconverted addresses are unfamiliar to the new server. Users who have some personal stores that are very old, so that the need for a future reply is highly unlikely, may therefore opt to leave such files unconverted. The conversions can run in the background, freeing the user's computer for other work, but the process is likely to slow the performance of other applications.)

The significant downsides of interactive user installation are:

- Increased demand for support from your organization's help desk, which may be considerable depending on your users' technical skills and the complexity of your "before" and "after" network configurations.
- Time and effort you, as an administrator, would have to devote to visiting multiple user workstations to physically copy the software to the users' desktops (for users who are not authorized to perform that task for themselves).

Administrator Performs Installation at Users' Computers

You may want to let some users "self-serve" their own installations, as described above, but assign administrators to visit others' desktops to perform some or all of the installation and configuration tasks for them. This approach can ensure a smooth migration for top executives or less technical users who are ill-prepared to perform the tasks for themselves. Your Deployment Plan should address whether these sorts of administrator visits are warranted for any users in your organization, and for whom.

Automated "Push" via SMS or Other Configuration Management Tools

Software installation on user desktops requires access privileges that often are disallowed to many or most end users. Most administrators of such networks use a configuration management tool, such as Microsoft's SMS, to "push" the software to

multiple users' desktops—a method that bypasses the requirement for user access privileges. If your network serves “locked-down” Windows environments, where end users cannot install software, this sort of automated configuration management can spare the administrator many visits to individual user desktops.

To accomplish a “push” distribution, you can use the Deployment Configuration Program to build two different bundled installation packages for each user, to be executed in succession. The first would perform the “push” installation of the necessary Sun Java System software, while the second would run an interactive process by which the user could make choices about the configuration of the installed software and the conversion of his or her own existing data files. This “push” method may even be used to completely automate the conversion process for end users, but would require some scripting since the package must be invoked with information specific to each end user (e.g., the user's Sun Java System credentials).

Your Deployment Configuration Program *Reference* provides instructions for using Microsoft's SMS to implement this “push” method of software distribution. The *Reference* also explains how to use command-line switches with an SMS script to fully automate the process by passing the necessary user passwords, for the user's Personal Folders (.pst) files, to the desktop installation program.

Command-Line Switches for Desktop Installation

The Sun Java System Connector Setup Wizard supports command-line switches that may be used in combination with the other desktop installation methods described above, or with an SMS script as described in Chapter 3, “Application Notes for Special Circumstances,” in *Sun Java System Connector for Microsoft Outlook 7 2005Q4 Administration Guide*.

The installation package will support these command-line switches:

```
/USERNAME=xxx, where xxx is the username on the Sun servers  
/PASSWORD=xxx, where xxx is the password on the Sun servers/  
FULLNAME=xxx, where xxx is the display name  
/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)
```

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  
/OLDPASSWORD=xxx, where xxx is the Exchange password
```

Migration of Important Server Data: More Than Just Messages

Your old server contains valuable information about your users, and an efficient migration will extract and use this information to provision the user accounts on your new Sun Java System server. In addition to your users' old mail messages, your old server contains user calendars, tasks, and personal address books and contacts. The old server also contains user names, primary Internet addresses, Internet aliases, phone numbers, postal addresses, and even descriptive information such as users' departments, titles, and so forth, and also all of your enterprise's public distribution lists.

While a detailed account of server data migration is beyond the scope of this document, you should understand that your old server is a valuable data resource that can be mined to drive user provisioning on the Sun Java System, as well as changes in mail routing. Sun Professional Services can help you to understand and accommodate server data migration in your Deployment Plan, and other third-party companies offer both technology and consulting expertise to facilitate the migration of your server data.

Mail Routing During Transition Phase of Server Migration

Not all of your users will migrate from the old server to the new server at the same time. User accounts on the new server are created and provisioned prior to users' actual migrations. As such, user mailboxes with the same address will reside on both the old and new servers simultaneously during your transition period. Some temporary mail-forwarding rules must therefore be defined to make sure that your users' mail is correctly routed during the transition period.

Even if your organization is implementing new Internet addresses, the old addresses must be maintained on the old server because replies to older messages will be deliverable only if the users' old primary Internet addresses continue to deliver to the correct server. Since all Internet mail for a given domain must go to a single server, specified in an associated MX record, your organization must decide when it will update its MX record to point to the new Sun Java System server.

If the MX record is switched to the Sun Java System server at the beginning of the transition period, you must configure the Sun Java System server so that any mail it cannot deliver to a local mailbox will be sent to the corresponding mailbox on the old

server. Moreover, as new users are provisioned on the Sun Java System server, you must define forwarding rules on the new server so that any mail that would normally be delivered to the new mailboxes will instead be forwarded to the corresponding user mailboxes on the old server. As each user migrates to the new server, you must then delete the first forwarding rule on the new server, and define a new rule on the old server to forward all of the user's mail to the corresponding Sun Java System mailbox.

On the other hand, if the MX record will point to the old server until the end of the transition phase, you must configure the old server to send mail it cannot deliver locally to the corresponding user mailboxes on the Sun Java System server. As users migrate to the new server you must then define new rules on the old server to forward mail sent by other users on the old server to the users' new accounts on the Sun Java System server.

Synchronization of Global Address Books During Migration

Larger organizations are likely to require weeks or months to complete a phased migration, and during your transition there will be some users on each of the two systems. Many organizations prefer that all users maintain access to an accurate enterprise directory (white pages, global address book), but accuracy will require regular synchronizations of the two servers' directories as employees are hired, transferred, terminated and so forth. Your Deployment Plan should therefore specify some mechanism for regularly synchronizing the two directories throughout your transition period.

Sun Professional Services can assist in addressing this issue. There are also several products available to perform directory synchronization.

New User IDs and Passwords for Sun Java System Servers

Most network systems are designed to prevent people from discovering user passwords, and this is particularly true of Microsoft Exchange. These security safeguards make it impossible to automatically retain users' existing passwords as they migrate from the old server to the new.

Meanwhile, many organizations prefer to standardize the form of their Internet addresses, or to combine domains during their migration to the Sun Java System. An organization must therefore decide, in advance, how account names and Internet addresses will be derived, and how users' new passwords will be assigned.

The network administrator must also devise a method for communicating these user credentials to both the users and the corporate help desk. One common approach is simply to prepare an email merge, just prior to a group's migration, so that each member of the migrating group receives his or her credentials independently, and just in time for the group's first logins to the new server.

Password-Protected Personal Stores in Outlook

Outlook users can assign passwords to their Personal Folders (.pst) files, but the Sun Java System Connector Setup Wizard needs to open and modify these files in order to convert them for use with the new Connector software and the Sun Java System server. Your end users will therefore have to provide the passwords for any .pst files that they want to convert.

The Setup Wizard will automatically prompt users for the necessary passwords as they are needed, but obviously this will require user involvement that makes a Silent Mode setup impossible. If it is important for you to run the Setup Wizard in Silent Mode, users can be instructed to remove all such passwords during the conversion, or simply let the Wizard run with the passwords in place. If the Setup Wizard runs in Silent Mode and encounters a password-protected file, it will not convert the file, and will report that not all files were converted. Depending on the settings in your administrator's Deployment Configuration tool, the Setup Wizard may also log the event as an error.

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