Oracle® Communications Connector for Microsoft Outlook

Installation Guide

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Preface

Oracle Communications Connector for Microsoft Outlook enables Oracle Communications Unified Communications Suite features and functionality to be available through Microsoft Outlook.

Audience

This documentation is intended for system administrators whose responsibility includes Connector for Microsoft Outlook. This guide assumes you are familiar with the following topics:

- System administration and networking
- Outlook Administration
- Messaging Server, Calendar Server, and Address Book protocols and standards
- Directory Server and LDAP
- General deployment architectures

Related Documents

For more information, see the following documents in the Oracle Communications Connector for Microsoft Outlook documentation set:

- *Connector for Microsoft Outlook Release Notes*
- *Connector for Microsoft Outlook Administration Guide*
- *Connector for Microsoft Outlook Security Guide*

Downloading Oracle Communications Unified Communications Suite Documentation

Product documentation is located on Oracle Technology Network:

http://docs.oracle.com

Additional Oracle Communications documentation is available from the Oracle software delivery Web site:

https://edelivery.oracle.com

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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Connector for Microsoft Outlook Overview

This chapter provides an overview of Oracle Communications Connector for Microsoft Outlook.

What is Connector for Microsoft Outlook?

Connector for Microsoft Outlook enables Outlook on Windows platforms to access data stored in Messaging Server, Calendar Server, and optionally, Address Book.

About Features Included in Connector for Microsoft Outlook

The following key features and functionality are available with Connector for Microsoft Outlook:

- Access to Messaging Server, Calendar Server, and Address Book Server

- Access to email folders on the Messaging Server via IMAP4

- Access to calendar data (events, appointments) and tasks stored in the Calendar Server via WCAP

- Access to corporate directory via LDAP

- Access to contacts stored in the Address Book server by using WABP

- Access to multiple calendars and address books

- Email based group scheduling

- Share calendar with other users and set specific permissions for shared calendars

- Subscribe to other users' calendars

- Delegate calendar access to others

- Typical task-related functionality (new task, modify task)

- Client-side rules attached to folders and data types

- Notes and Journal stored in IMAP folders

- Full offline support for mail, calendar, and address book

- Interoperability with Convergence

- Management of server-side message filters

- Global Address List with browsing capabilities

- Progress displayed when synchronizing large folders

- Sharing contacts with other users and setting specific permissions for shared contacts
- Ability to search for users for mail/calendar/contacts folders sharing
- Name and email address automatically set and updated from LDAP
- Option to preview body of all messages
- Share mail folders with other users and set specific permissions for shared contacts
- Out-of-office setting, and ability to notify user that setting is activated at login
- Support for large PST files
- Support for search or virtual Folders

Typical Email Features

The following key features and functionality are available for email functionality:

- Compose, reply, and forward messages
- Use Microsoft Word to write and edit messages
- Apply spell check and encryption to message body
- Apply address completion to message headers
- Add signatures to messages
- Polling all mail folders by setting user defined polling intervals
- Adding attachments to mail
- Subscribe to other users' mail folders
- Setting mail filters
- Editing and saving modified attachment on IMAP server

Typical Calendar Features

The following key features and functionality are available for calendar functionality:

- Creating and sharing multiple calendars
- Viewing group memberships within contact details
- Access attachments in calendar events and to-do's
- Create new appointments and events (all-day, recurring, public, private)
- Modify events
- Check availability
- Suggest alternate times for events
- Track responses to event requests
- View group memberships within Contact details
- Polling calendar folders by setting user-defined polling intervals

Typical Address Book Features

The following key features and functionality are available through address book functionality:

- Creating and sharing multiple address books

- Create and share multiple address books

- Creating distribution lists

- Creating contacts with photos

- Polling contact folders by setting user-defined polling intervals

About Connector for Microsoft Outlook System Architecture

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

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

Connector for Microsoft Outlook includes support for address book service. You must install Oracle Communications Convergence to enable the address book service. This service makes use of WABP and allows a user to have a personal address book accessible from Outlook and Convergence. To install Convergence, see https://wikis.oracle.com/display/CommSuite/Convergence+Index

Figure 1–1 shows Connector for Microsoft Outlook querying the back-end servers and converting the information from IMAP, SMTP, WCAP, WABP, and LDAP to MAPI properties so that end users can access these services with Microsoft Outlook. Conversely, MAPI information is sent to Connector for Microsoft Outlook and converted to standard protocols for the back-end servers to read.

Figure 1–1 Overview of the Connector for Microsoft Outlook Process
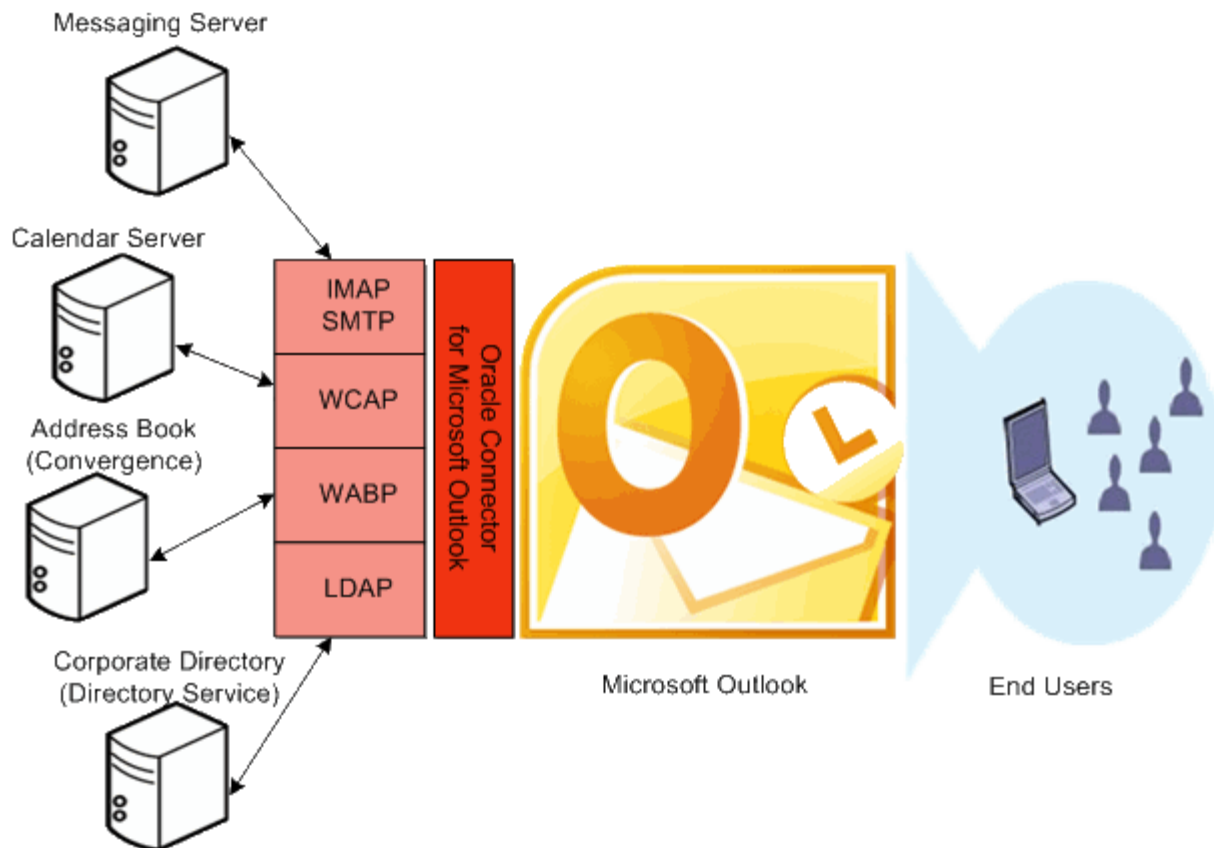
About Desktop Toolkit Deployment

The desktop toolkit deployment of Connector for Microsoft Outlook on each user desktop requires three distinct tasks:

- **Installation.** The necessary and appropriate software must be physically installed on 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 "About Connector for Microsoft Outlook Installation Considerations".) If your network serves locked-down Windows environments where end users cannot install software, Oracle recommends this sort of automated configuration management as a way to avoid many individual desktop visits.

- **Configuration.** Connector for Microsoft Outlook is installed with an assortment of configuration parameters including 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 IMAP and POP profiles to the Connector for Microsoft Outlook profile.

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.

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 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 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 other groups.

An administrator can convert IMAP and POP profiles to Connector for Microsoft Outlook profile.

What's Next?

Planning and foresight are critical to a smooth deployment, so you should have already prepared a comprehensive deployment plan before installing the administrator software as described in this information. If you have not yet prepared a deployment plan, do it now, before you attempt to create your first desktop deployment kit. The process of developing a comprehensive deployment plan is a valuable exercise that leads you to consider and accommodate all of the factors likely to influence your organization's migration.

After you have prepared your deployment plan and installed the administrator software, you can:

- **Configure an end-user package.** *Connector for Microsoft Outlook Administration Guide* explains how to use the deployment desktop toolkit 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 IMAP/ POP data files for use with the new software, or both, depending on your circumstances.

- **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 to a shared folder, and then provide links to the installation package in an announcement email to users.

If your migration strategy calls for two or more different installation packages for different users or user groups, repeat these two steps for each package until all users have been migrated.

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Connector for Microsoft Outlook System Requirements

This chapter describes the operating system and software requirements for installing Oracle Communications Connector for Microsoft Outlook.

Supported Operating Systems

This section describes the supported operating system requirements and recommendations for Connector for Microsoft Outlook.

The following operating systems are supported:

- Microsoft Windows 8
- Microsoft Windows 7
- Microsoft Windows Vista

The following operating systems are deprecated:

- Microsoft Windows XP
- Microsoft Windows 2003 Terminal Server

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 the discussion on designating Microsoft Outlook at the default client in *Connector for Microsoft Outlook Administration Guide* to resolve this problem.

The software cannot be installed to any workstation that contains the Sun Java System Synchronization program, which is incompatible with Connector for Microsoft Outlook. If the synchronization program has been installed on a particular user's desktop, it must be removed. See the discussion on removing Sun Java System Synchronization Program in *Connector for Microsoft Outlook Administration Guide*.

Required Software

This section describes the additional required software for Connector for Microsoft Outlook.

Supported Versions of Microsoft Outlook

Three versions of Microsoft Outlook are supported on various versions of Microsoft Windows.

Table 2–1 lists the supported versions of Microsoft Outlook with Windows operating systems.

Table 2–1   Supported Versions of Microsoft Outlook

Outlook Version	Windows 8	Windows 7	Windows Vista	Windows XP	Windows 2003 Terminal Server
Outlook 2013 (32-bit and 64-bit)	Supported	Supported	Not supported	Not supported	Not supported
Outlook 2010 (32-bit and 64-bit)	Supported	Supported	Supported	Not supported	Not supported
Outlook 2007 (32-bit)	Supported	Supported	Supported	Deprecated	Deprecated

> **Note:** 32-bit and 64-bit versions refer to the versions of Microsoft Outlook, not the Windows operating system.

> **Note:** Calendar Server customers who have deployed previous versions of Oracle Calendar Server need to engage with Oracle Consulting. A migration offering is available that enables data to be converted and migrated to the new format. This migration is required for Outlook because of changes in the storage and management of recurring events.

Redistributable Files for Connector for Microsoft Outlook

In order to install Connector for Microsoft Outlook, you need to download Visual C++ Redistributable for Visual Studio 2012.

You can download Visual C++ Redistributable for Visual Studio 2012 from the Microsoft website:

http://www.microsoft.com/en-US/download/details.aspx?id=30679

There are separate executables for 32-bit and 64-bit installations for the respective Outlook versions:

- **vcredist_x86.exe** (32-bit)
- **vcredist_x64.exe** (64-bit)

> **Note:** 32-bit and 64-bit versions refer to the versions of Microsoft Outlook, not the Windows operating system.

After downloading and running one of the redistributable executables, you can proceed to "Installing the Desktop Deployment Toolkit" if you are installing the product or "Upgrading Connector for Microsoft Outlook" if you are upgrading the product.

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Connector for Microsoft Outlook Pre-Installation Tasks

This chapter provides information that requires consideration prior to installing Connector for Microsoft Outlook.

About Connector for Microsoft Outlook Installation Considerations

The 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 in this section describe the most common scenarios, and explain how the migration tools accommodate them.

Interactive User Installation (Self-Service)

The setup wizard is designed to be run by end users 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 plug-in on user desktops requires access privileges that often are disallowed to many or most end users. If users do not have installation privileges for their own desktops, either of the following strategies may be used:

- Administrators physically install the plug-in on individual users' desktops.

- Use a configuration management tool to *push* the software to multiple users' desktops (explained in "Automated Installation Using Configuration Management Tools").

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 storage folders (**.pst**) files.

End users who run the conversion program will provide their own credentials for the servers. This method therefore permits conversion of password-protected **.pst** files (see "Password-Protected Personal Stores in Outlook"), and lets users specify which of their personal stores should be converted for use with the plug-in.

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 users' technical skills and the complexity of before and after network configurations.

- Time and effort the administrator has 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).

Individual Desktop Installation

Administrators may allow some users to perform their own installations, as described above, but visit other user's 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 not prepared to perform the tasks for themselves. The deployment plan should address whether these sorts of administrator visits are warranted for any users in the organization, and for whom.

Automated Installation Using 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 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 the user's own existing data files. This push method may 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 (that is, the user's credentials).

See *Connector for Microsoft Outlook Administration Guide* for instructions on using Microsoft's SMS to implement this push method of software distribution. This guide 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 storage folders (**.pst**) files, to the desktop installation program.

Command-Line Switches for Desktop Installation

The 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 the discussion on command-line switches for the user installation package in the *Connector for Microsoft Outlook Administration Guide*.

The installation package will support these command-line switches:

/USERNAME=*xxx*, where *xxx* is the username on the Unified Communications Suite servers

/PASSWORD=*xxx*, where *xxx* is the password on the Unified Communications Suite 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 Unified Communications Suite servers

/NEWPROFILENAME=_xxx_, where _xxx_ is the name of the created profile

/SAVEPASSWORD=_n_, where _n_ = 1 (save) or 0 (don't save)

Password-Protected Personal Stores in Outlook

Outlook users can assign passwords to their personal storage folders (**.pst**) files, but the Setup Wizard needs to open and modify these files in order to convert them for use with the new Connector software and the Unified Communications Suite 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 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 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.

Redistributable Files for Connector for Microsoft Outlook

In order to install Connector for Microsoft Outlook Connector, you need to download Visual C++ Redistributable for Visual Studio 2012. For more information, see "Redistributable Files for Connector for Microsoft Outlook".

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Installing the Desktop Deployment Toolkit

This chapter describes installing and upgrading the administrator's Desktop Deployment Toolkit for Oracle Communications Connector for Microsoft Outlook. The InstallShield Wizard installs all of the components of the Deployment Toolkit:

- **Deployment Configuration Program**: Lets system administrators create bundled, customized installation packages for end users.

- **Oracle Communications Connector for Microsoft Outlook Setup Wizard**: Lets end users install the Connector for Microsoft Outlook software, configure its operations and features, and convert existing personal storage folder files (**.pst** files) associated with IMAP or POP into a form that Unified Communications Suite can use.

- **Installation kit (MSI) for Connector for Microsoft Outlook**: Installation utility for the per-desktop software that facilitates ongoing, permanent communications between Microsoft Outlook and Unified Communications Suite.

- **Special Kits for using Microsoft System Management Services (SMS) to install Connector for Microsoft Outlook**: Utilities that support the "push" functionality of Microsoft's SMS to let a system administrator distribute and install the Connector for Microsoft Outlook desktop components to user desktops with minimal or no user involvement.

These components are described in more detail in "Connector for Microsoft Outlook Overview" "Connector for Microsoft Outlook Pre-Installation Tasks", and *Connector for Microsoft Outlook Administration Guide*.

This chapter describes only the installation of this deployment toolkit, and is organized into the following sections:

- Installation Overview
- Installing the Administrator's Software

Installation Overview

If the most recent version of the administrator's deployment toolkit for the Connector for Microsoft Outlook is not already installed on your computer, you must install it before you can create end-user installation packages.

Before you install, you should verify that the systems on which you plan to install the software meet the minimum product requirements. It is also a good idea to plan how you want to deploy and configure the software components before you begin the installation process. See "Connector for Microsoft Outlook System Requirements" for hardware and software requirements and supported versions.

> **Note:** If you are upgrading from an earlier version of the Desktop Deployment Toolkit, the InstallShield Wizard overwrites the earlier version with this new version, and leaves only a single program entry in the Add/Remove Programs applet in Windows' Control Panel. There is no separate procedure or special accommodation for a version upgrade versus a first-time installation.

Installing the Administrator's Software

Follow the steps below to install the administrator's Desktop Deployment Toolkit.

Running the Desktop Deployment Toolkit

1. Locate the Connector for Microsoft Outlook setup file, **Setup.exe**, that you have downloaded or otherwise copied to your computer.

   Double-click the filename to start the program. You are prompted to select your preferred language.

   The InstallShield Wizard then welcomes you to the process and prompts you to click **Next** to continue.

2. Enter your customer information.

   Enter your user name and organization and choose whether you want the Deployment Configuration Program software to be available to all users of this computer, or only to your user name.

   Click **Next** to continue.

3. Select or confirm the destination folder where the Deployment Configuration Program is installed.

   The Destination Folder window prompts you to confirm or change the location where the Deployment Configuration Program is installed.

   To change the location, click **Change**. In the Change Current Destination Folder window, set the desired folder. Once the destination folder is set, click **Next** in the Destination Folder window.

4. Install the software.

   The InstallShield Wizard then announces that it is ready to begin the actual installation, and prompts you to click **Next** to begin.

5. Wait for the installation to proceed and conclude.

   A progress meter appears in the window while you are waiting. The Installation Complete window notifies you that the process is complete, and prompts you to click **Finish**.

6. Select the **Launch the Connector for Microsoft Outlook Deployment Configuration Program** checkbox.

7. Click **Finish**.

   The Connector for Microsoft Outlook Deployment Configuration Program icon **Oracle Communications Connector for Microsoft Outlook Deployment** appears on the desktop. As the InstallShield Wizard exits, it opens a browser window with links to the Oracle website where you can access Outlook Connector documentation.

The desktop deployment toolkit has now been installed to the location you specified in the **Destination Folder** window. The default folder is:

C:\Program Files\Oracle\Deployment Configuration Program

A new shortcut icon for the administrator's deployment configuration program (**Admin.exe**) appears on your desktop.

The deployment configuration program saves those preset configuration parameters in an **.ini** text file, and then bundles the **.ini** file with an installation program, called 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 for Microsoft Outlook software on his or her desktop according to the Administrator's specifications.

Figure 4–1 describes this deployment process for Connector for Microsoft Outlook.

Figure 4–1   Deployment Process for Connector for Microsoft Outlook

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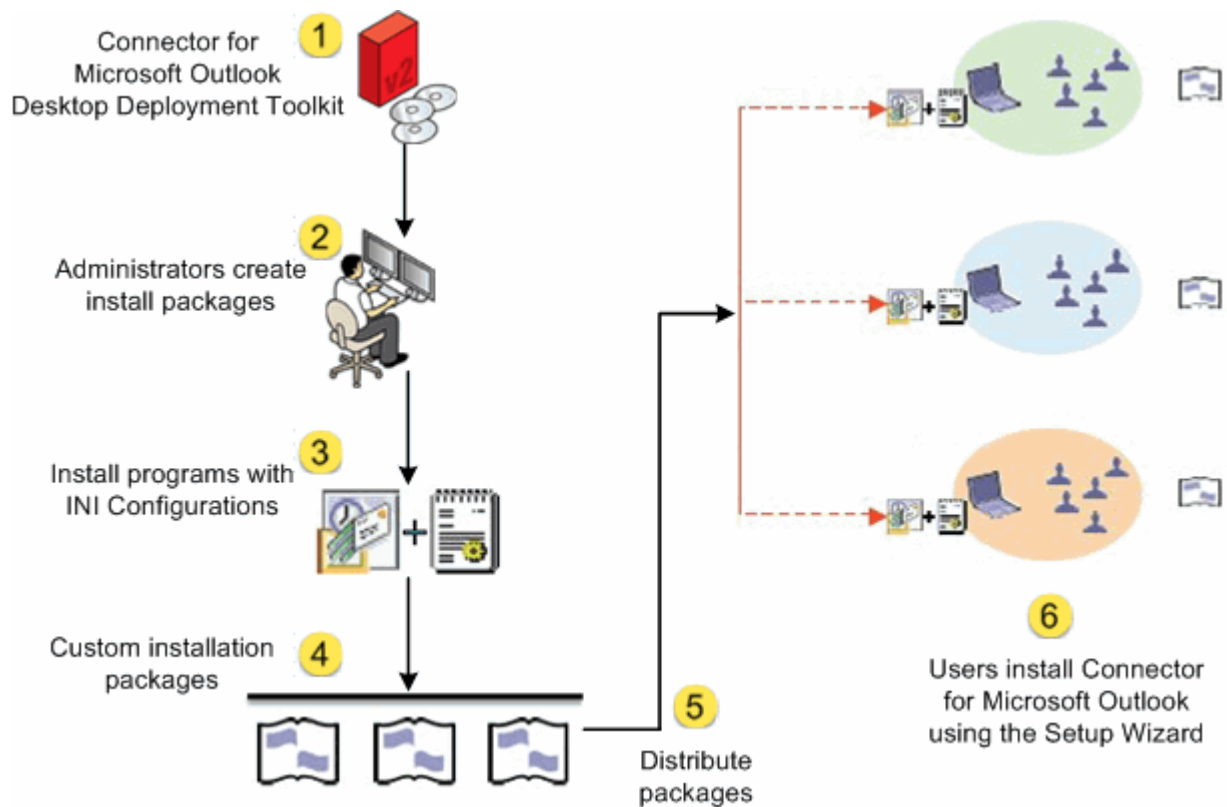
Upgrading Connector for Microsoft Outlook

This chapter describes how to upgrade to Oracle Communications Connector for Microsoft Outlook 8.0.2.

This chapter includes the following sections:

- Upgrading Connector for Microsoft Outlook
- Upgrade/Conversion Scenarios
- Rolling Back to Previous Version

Upgrading Connector for Microsoft Outlook

This section explains how you can upgrade from Connector for Microsoft Outlook 7.1 and subsequent versions to Connector for Microsoft Outlook 8.0.2.

Before you upgrade, as a prerequisite, make sure your default mail client is set as Microsoft Outlook. For information on setting the default mail client, see the discussion on designating Microsoft Outlook as default mail client in *Connector for Microsoft Outlook Administration Guide*.

The steps for upgrading Connector for Microsoft Outlook are as follows:

Upgrading Connector for Microsoft Outlook Deployment Configuration Program

1. Download and run Visual C++ Redistributable for Visual Studio 2012. For more information, see "Redistributable Files for Connector for Microsoft Outlook".

2. Double-click **setup.exe** from the Connector for Microsoft Outlook package.

3. Choose the preferred language from the drop-down list in the Install/Upgrade wizard.

   The system checks if you wish to upgrade the Oracle Communications Connector for Microsoft Outlook Deployment Configuration Program.

4. Click **Yes** to confirm or **No** to exit.

   The wizard starts the installation.

5. Click **OK**.

Upgrading the End User's Outlook Connector Installation

1. Invoke Oracle Communications Connector for Microsoft Outlook Deployment Configuration Program from the desktop.

2. Clear the **Create/Convert/Upgrade** user profile option in the **Processes** tab.

3. Select the **Install or upgrade Connector for Microsoft Outlook** option.

4. Click **File** and save it as **filename.ini**.

   The Connector for Microsoft Outlook Deployment Configuration Program creates an executable with the configuration file (.ini) you created.

5. Run the executable to start the upgrade:

   C:\Program Files\Oracle\Deployment Configuration Program\Packages\filename.exe

   The Connector for Microsoft Outlook Setup Wizard is displayed.

6. Click **Next** to start the end user's Connector for Microsoft Outlook installation.

7. Click **Exit** to close the window.

   The end user software has successfully installed.

Upgrade/Conversion Scenarios

- The upgrade scenario upgrades existing Connector for Microsoft Outlook profiles to new Connector for Microsoft Outlook profiles with new configurations.

- The conversion scenario converts existing IMAP/POP profiles to Connector for Microsoft Outlook profiles with new server configurations.

Upgrade Scenario

1. Open the Connector for Microsoft Outlook deployment configuration program.

2. Select **Create/Convert/Upgrade** user profile check box from Processes tab.

3. Select **Upgrade Profile** check box under **Upgrade Profile Settings** from **User Profiles** tab.

4. Provide all required server and other details in respective tabs in the Connector for Microsoft Outlook deployment configuration program.

5. Click **File** and save it as **Filename.ini**.

6. Run the newly created package.

Conversion Scenario

1. Open the Connector for Microsoft Outlook deployment configuration program.

2. Select **Create/Convert/Upgrade** user profile check box fin the Processes tab.

3. Select **Convert Existing Profile** check box under **Convert Profile Settings** in the **User Profiles** tab.

4. Provide all required server and other details in respective tabs in the Connector for Microsoft Outlook deployment configuration program.

5. Click **File** and save it as **Filename.ini**.

6. Run the newly created package.

Rolling Back to Previous Version

You cannot roll back to the previous version of Connector for Microsoft Outlook. You can uninstall the current version by using **Add/Remove Programs** from the Control Panel, and then install the required version.