SCO*office* Mail Connector For Microsoft Outlook

Installation Guide
Outlook 97, 98 and 2000

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Introduction

This document describes the SCO*office* Mail Connector for Microsoft Outlook, how to install and configure it, and how to use some of its features. These are the main points that you will find in this document:

- Description of the SCO*office* Mail Connector
- Before you install
- Installation and upgrade
- Email account configuration - Connector Setup Wizard
- Email account configuration - manual steps
- Using the Connector

What does the SCO*office* Mail Connector do?

The SCO*office* Mail Connector for Microsoft Outlook seamlessly enables the full collaborative features of Microsoft Outlook when used with the *SCOoffice* Mail Server. For example, SCO*office* Mail Server users can utilize Outlook shared global address books, shared message folders, shared contacts, shared calendars, calendar and folder delegation, and shared forms libraries to name a few. Historically, these features were only available through Outlook when using a Microsoft Exchange Server. The collaborative features of Outlook are now available without the high cost and complexity of Microsoft Exchange.

The SCO*office* Mail Connector enhances the appearance of Outlook with the addition of the Connector toolbar to the Outlook menu. The toolbar consists of five buttons which allow the user to configure email accounts, set folder options, share folders and set folder access permissions. Aside from this toolbar, the user experience of using Outlook is essentially unchanged.

The SCO*office* Mail Connector is installed on the Microsoft Windows system where Outlook is to be used. It is an Exchange client extension which simply means that it transparently plugs into Outlook to extend its abilities in the manner described above. It can be used with any version of Microsoft Outlook from 97 through 2002. Outlook 98 and Outlook 2000 must be configured in Corporate Workgroup mode so that the necessary services of Outlook will be installed and enabled. Outlook 97 and Outlook 2002 have no concept of the Corporate Workgroup mode and provide the necessary services by default.

Before You Begin

- This guide was written specifically for Microsoft Outlook 97, Outlook 98 and Outlook 2000. If you are using Microsoft Outlook XP refer to the document titled "SCO*office* Mail Connector for Microsoft Outlook XP - Installation Guide".

- Outlook 98 and Outlook 2000 must be configured for the 'Corporate or Workgroup' service. In Outlook click on 'Help' then 'About Microsoft Outlook' to view the service for which Outlook has been configured.

  To change the configuration for Outlook 98 you must re-run the Outlook 98 setup by running 'Add/Remove Programs' in the 'Control Panel'. Select 'Outlook 98' and click on 'Add/Remove' or 'Change' depending on the version of Microsoft Windows. This will present you with the option to re-run Outlook 98 setup. When the 'E-mail Service Options' dialog is displayed select 'Corporate or Workgroup'.

  To change the configuration for Outlook 2000 click on the Outlook 'Tools' menu item and select 'Options'. Select the 'Mail Delivery' tab and click the 'Reconfigure Mail Delivery…' button. Select the 'Corporate or Workgroup' option.

  When changing the configuration of either Outlook 98 or Outlook 2000 to the 'Corporate of Workgroup' service, you may be requested to insert your original Outlook installation media. Make sure that you have your original Outlook installation media or that the original software is available via a network share before you attempt to change the Outlook configuration.

  Outlook 97 and Outlook XP do not incorporate the concept of the 'Corporate or Workgroup' service.

- Verify that you already have an email account activated on your SCO*office* Mail Server.

- You will need the following information to configure the SCO*office* Mail Connector. This information should be provided to you by your system administrator.

    o The fully qualified hostname of the SCO*office* Mail Server.
    o Your SCO*office* Mail Server email login ID and password.
    o Your email address.
    o Your license key for the SCO*office* Mail Connector.

- If you will be migrating email from a Microsoft Exchange server mailbox to a SCO*office* Mail Server mailbox be sure that the Exchange mailbox is configured in Outlook before you install the SCO*office* Mail Connector. Additionally, and most importantly, the SCO*office* Mail Connector must be configured to use a PST file for the SCO*office* Mail Server mail account that is different from the PST file used for the Microsoft Exchange mail account.

SCO*office* Mail Connector Installation and Upgrade

1. Close Outlook if it is running.

2. If you are upgrading from a previous version of the SCO*office* Mail Connector it is not necessary to remove the old version. It is strongly recommended that you run the scanpst.exe program to repair any inconsistencies in the PST file prior to installing the new version. The scanpst.exe program can be found one of these two locations:

   'Program Files\Common Files\System\Mapi\1033'
   'Program Files\Common Files\System\Mapi\1033\NT'

3. Download the SCO*office* Mail Connector zip file and extract the contents using an unzip/decompress utility, such as WinZip.

4. Run the resulting SCO*office* Mail Connector setup program to install the SCO*office* Mail Connector software. Enter the SCO*office* Mail Connector license key when prompted to do so.

5. If you are upgrading from a previous version of the SCO*office* Mail Connector you are done otherwise proceed to the following section.

Email Account Configuration – Connector Setup Wizard

1. Start Outlook.

   If this is the first time running Outlook or no local email accounts for Outlook have been previously configured Outlook will display the 'Inbox Setup Wizard'. This wizard will configure the Internet Mail service and a POP3/SMTP email account. If the 'Inbox Setup Wizard' is displayed proceed to step 2.

   If an Outlook POP3/SMTP email account is already configured the 'SCO*office* Mail Connector Wizard' may appear. This wizard is used to configure the Mail Connector to bind the POP3/SMTP email account (and PST file) with the SCO*office* Mail Server. If the 'SCO*office* Mail Connector Wizard' is displayed proceed to step 3.

   If Outlook starts up normally proceed to the section titled 'Email Account Configuration – Manual Steps'. Use the instructions in that section to configure your email account.

2. Setting up the 'Internet E-mail' information service and email account.

   The dialog window 'Inbox Setup Wizard' prompts you for the information service to use with Microsoft Outlook. .

   - Select 'Use the following information services'.
   - Check mark only the 'Internet E-mail' service in the list.
   - Click 'Next'.

   You may now be prompted for a Profile Name. Click 'Next' to accept the default name or enter something more descriptive for your configuration. Click 'Next'.

   - Click 'Setup Mail Account'.

   The 'Mail Account Properties' dialog window will be displayed. This dialog is used to set up the POP3/SMTP email account.

   In the 'Mail Account Properties' dialog window enter any name that you wish to use for the mail server such as "SCO*office* Mail Server". Enter your full name, your full email address and a reply address if it is to be different from your email address. You may also enter a value in the 'Organization' field.

   - Click on the 'Servers' tab.

   Enter 'none' for the incoming (POP3) mail server.
   Enter the fully qualified hostname of your SCO*office* Mail Server for the outgoing (SMTP) mail server. Enter your email login ID and password.

   - Click on the 'Connection' tab.

   Select 'Connect using my local area network (LAN)' to ensure that the account uses the network for connectivity and **not** the modem.

   - Click on the 'Advanced' tab.

   In the 'Delivery' section of the 'Advanced' dialog click on 'Leave a copy of messages on server'.

   - Click on 'Apply' at the bottom of the dialog.
   - Click on 'Ok'.
   - Click 'Next'.
   - Click 'Next" to accept the default PST file.
   - Click 'Finish'.

5

3. Connector Setup Wizard – specifying the PST file and the SCOoffice Mail Server email login ID and password.

The SCO*office* Mail Connector Wizard configures the Mail Connector to bind the POP3/SMTP email account (and PST file) to the SCO*office* Mail Server.

After the Internet E-mail service and account is configured the SCO*office* Mail Connector Wizard should start automatically. If for some reason, the Connector Wizard does not start proceed to the section titled 'Email Account Configuration – Manual Steps*'.*

- Read the introductory panel.
- Click 'Next'.

The next dialog is used to specify the hostname of the SCO*office* Mail Server and the login and password used to access your email account on it. Enter the following information:

Hostname: Hostname of the SCO*office* Mail Server.
Port 143: For SSL set this to 993 and check mark 'Use SSL (secure connection)'
Login: Your SCO*office* Mail Server email login ID (not your email address)
Password: The password for your email login ID.

Ensure that the check box for 'Map this store to the following IMAP server' is checked.

Now click the 'Ping Server' button. 'Ping Server' will check for connectivity to the SCOoffice Mail Server and the validity of the email login ID and password.

If 'Ping Server' is unsuccessful your Outlook client may not have network connectivity, or the SCO*office* Mail Server was unable to authenticate the email login ID and password you entered. Re-enter your email login ID and password and try again. If 'Ping Server' fails again clear the error message by clicking 'OK' and click 'Cancel'. You will then be asked if you would like to restart the wizard the next time you open Outlook. If you choose not to re-start the wizard you may configure your email account at a later date using the 'Email Account Configuration – Manual Steps*'* instructions contained within this document. Report your problem to the system administrator.

If 'Ping Server' is successful click 'OK' to clear the success message.

- Click 'Next'.

The next dialog is used to select the Personal Folders file (PST file) for the email account. The PST file resides on your computer and is used as an intermediate storage location for messages as they flow between Outlook and the SCO*office* Mail Server via the Mail Connector.

To use the PST file created by step 2 above click the radio button to select 'Use one of the existing PST files' then click on the PST file in the list. Most likely this will be 'Personal Folders'. Advanced users may want to create a new PST file which is also appropriate for this step.

- Click 'Next'.

The next dialog window describes the manual configuration of the Internet Mail service and POP3/SMTP email account. Ignore the instructions in this dialog window.

- Click 'Next'
- Click 'Finish'

4. Restart Outlook.

Perform steps 4, 5 and 6 in the following section to complete the configuration.

Email Account Configuration – Manual Steps

1. Setting up the PST file and specifying the SCO*office* Mail Server email login ID and password.

- Click the 'IMAP Mailboxes' button on the SCO*office* Mail Connector toolbar.

The 'SCO*office* Mail Connector Options' dialog window will be displayed.

- Click 'Add'.

The 'Add New IMAP Mailbox' dialog window will be displayed. Select 'Create a new PST file' or 'Use existing PST file'. If you select 'Use existing PST file' you will also need to highlight the PST file that you wish to use by clicking on it in the list provided.

- Click 'OK'.

7

You should be back at the 'SCO*office* Mail Connector Options' dialog window. Select the mailbox (PST file) specified in the previous step by clicking on it in the list provided.

- Click 'Options'.

The 'SCOoffice Mail Connector Host Information' dialog window will be displayed. Enter the following information:

Hostname: Hostname of the SCO*office* Mail Server.
Port 143: For SSL set this to 993 and check mark 'Use SSL (secure connection)'
Login: Your SCO*office* Mail Server email login ID.
Password: The password for your email login ID.

Ensure that the check box for 'Map this store to the following IMAP server' is checked.

Now click the 'Ping Server' button. 'Ping Server' will check for connectivity to the SCOoffice Mail Server and the validity of the email login ID and password.

If 'Ping Server' is unsuccessful your Outlook client may not have network connectivity, or the SCO*office* Mail Server was unable to authenticate the email login ID and password you entered. Re-enter your email login ID and password and try again. If 'Ping Server' fails again clear the error message by clicking 'OK' and click 'Cancel'. Report your problem to the system administrator.

If 'Ping Server' is successful click 'OK' to clear the success message.

- Click 'OK' to complete this dialog.

2. Setting up the POP3/SMTP email account and set the Delivery location to the PST file from step 1.

You need to setup a POP3/SMTP account if you do not already have one for the SCO*office* Mail Connector. The SMTP service is required by the SCO*office* Mail Connector for sending messages. The POP3 portion of the service is essentially ignored by the SCO*office* Mail Connector.

To setup POP3/SMTP for Outlook 97, 98 and 2000:

- Click on the 'Tools' in the Outlook menu and select 'Services'.

The 'Services' dialog window will be displayed.

- Click on the 'Services' tab.
- Click 'Add'.

The 'Add Service to Profile' dialog will be displayed.

- Select 'Internet E-mail' from the list and click 'OK'.

The 'Mail Account Properties' dialog window will be displayed.

In the 'Mail Account Properties' dialog window enter any name that you wish to use for the mail server such as "SCO*office* Mail Server". Enter your full name, your full email address and a reply address if it is to be different from your email address. You may also enter a value in the 'Organization' field.

- Click on the 'Servers' tab of the 'Mail Account Properties' dialog window.

Enter a fake name such as 'none' for the incoming (POP3) mail server.
Enter the fully qualified hostname of your SCO*office* Mail Server for the outgoing (SMTP) mail server. Enter your email login ID and password.

- Click on the 'Connection' tab.

Select 'Connect using my local area network (LAN)' to ensure that the account uses the network for connectivity and **not** the modem.

- Click on the 'Advanced' tab.

In the 'Delivery' section of the 'Advanced' dialog click on 'Leave a copy of messages on server'.

- Click on 'Apply' at the bottom of the dialog.
- Click on 'Ok'.

You will now be back at the 'Services' dialog window.

- Click on the 'Delivery' tab in the 'Services' dialog window.

In the 'Deliver new mail to the following location:' pull down list select the name of the PST file from specified in step 1 above.

- Click 'OK'.

3. Restart Outlook.

4. Disabling Outlook email account synchronization.

   Email accounts managed by the SCO*office* Mail Connector are synchronized with the SCO*office* Mail Server by the Mail Connector. Synchronization by Outlook of these accounts must be disabled otherwise you may receive duplicate messages. Email accounts not managed by the Mail Connector should continue to be synchronized by Outlook.

   Disabling Outlook synchronization

   - Click on the 'Tools' menu item and select 'Options'.
   - Click on the 'E-mail' tab in Outlook 97 or the 'Mail Services' tab in Outlook 98 and Outlook 2000.
   - Uncheck 'Internet E-mail' in the 'Check for new mail on' box.
   - Click on the 'Internet E-mail' tab.
   - Uncheck 'Check my local network connection(s) for new mail for __ minute(s)'.
   - Click 'Apply'.
   - Click 'Ok'.

5. Migration of Outlook's pre-defined Special Folders

   The Outlook pre-defined Special Folders are Contacts, Calendar, Journal, Notes, and Tasks. The default placement of these folders in the Outlook Folders List (click on 'View' and select 'Folders List' in the Outlook menu) is at the same level as Inbox. When using the Mail Connector with the Caldera Volution Messaging Server the Special Folders must be subfolders of Inbox. The Mail Connector will perform the migration automatically when one of these folders is selected or the Folder List is collapsed and re-expanded by clicking the '–' and '+' symbols are the top of the Folder List hierarchy.

   When the Mail Connector performs the migration a message window will be displayed for each folder when it is migrated. The message window will indicate that the folder, such as Calendar, could not be created on the server at the same level as Inbox and prompts to have the folder created under Inbox. Simply respond 'Yes' to each of these prompts.

   Note: If you are using the Mail Connector with SCO*office* Mail Server version 2 or later the Special Folders are not required to be under Inbox and will not be migrated.

   This completes the configuration tasks. Proceed to the section titled 'Using the SCO*office* Mail Connector'.

6. Configuring free/busy calendar information.

If you will be using the Outlook calendar to schedule meetings with other people you will want to configure Outlook to publish you free/busy calendar information to the SCO*office* Mail Server. This will allow other users to determine when you are available for meetings.

- Click 'Tools' in the Outlook menu and select 'Options'.
- Click 'Calendar Options'.
- Click 'Free/Busy Options'.
- Check mark 'Publish my free/busy information'.

In the 'Publish at this URL' input box enter the following:

ftp://*email_ID*:*password*@*hostname*/pub/calendar/*email*.vfb

- Substitute *email_ID* with your email login ID for the SCOoffice Mail Server.
- Substitue *password* with the password for your email login ID.
- Substitute *hostname* with the fully qualified hostname of your SCO*office* Mail Server.
- Substitute *email* with the first part of your email address (up to but not including the '@' character).

Example: ftp://bob:bobspwd@myserver.com/pub/calendar/bob.vfb

In the 'Search at this URL' input box enter the following:

ftp://*hostname*/pub/calendar/%NAME%.vfb

- Substitute *hostname* with the fully qualified hostname of your SCO*office* Mail Server.

Example: ftp://myserver.com/pub/calendar/%NAME%.vfb

Using the SCO*office* Mail Connector

- **Determining the version of the SCO*office* Mail Connector**

The version and build numbers of the SCO*office* Mail Connector can be displayed by clicking 'About' in the SCO*office* Mail Connector toolbar. The version number is plainly labeled. The build number immediately follows the copyright notice.

- **A note about migration from MS Exchange Server to SCO*office* Mail Server**

If you have correctly configured Outlook both the Exchange mailbox folders and the SCO*office* Mail Server mailbox folder will appear in the Outlook mail folder list. Simply copy the Exchange folders to the corresponding folders in the SCO*office* Mail Server account.

After the initial synchronization is complete, the Exchange server can be dismantled and the Exchange service can be removed from Outlook client. Exchange services in Outlook are not required for the SCO*office* Mail Connector .

- **Using Shared Folders**

    The SCO*office* Mail Connector allows you to share your mail folders and Special Folders, such as Calendar, with other SCO*office* Mail Server users. Folders are shared simply by granting permission for other users to access the folder. Having done this the folder will automatically appear in the other users Outlook Folders List. Permissions are assigned on a per user per folder basis.

    To share a folder with other users:

    a. Display the Outlook folders list by clicking on 'View' then 'Folder List' in the Outlook menu.

    b. Click on the folder in the folder list that you with to share.

    c. Click the 'Folder' button in the SCO*office* Mail Connector toolbar.
        The 'SCO*office* Mail Folder Options' dialog window will be displayed

        To add a user to the list of users who will have access to the folder :

        - Click on 'Add' in the 'Permissions' section of the dialog window.
        - Enter the users email login ID, not their email address, in the space provided. Normally, the users email login ID is the same as their email address. Click 'OK'.
        - Select the permissions that you wish to assign to the user.

        To modify permissions assigned to a user:

        - Select the email ID of the user in the list by clicking on it.
        - Select and de-select permission as appropriate.

        To remove permissions for a user:

        - Select the email ID of the user in the list by clicking on it.
        - Click the 'Remove' button in the 'permission' section of the dialog window.

d. When you are done changing permissions click 'OK' at the bottom of the 'SCO*office* Mail Folder Options' dialog window.

By default, the 'Permissions' list box will lists the owner of the folder with all access rights assigned (enabled). Removing the owner from the list of users who have access to the folder will lock the owner out of their own folder. Any user with administrator privileges on the folder can assign access back to the owner.

The special user 'anyone' can be used to assign permissions to all users.
Note that permissions can not be viewed or assigned to empty folders.

The access rights are defined as follows:

- **Lookup** – Look up the name of the folder (but not its contents).
- **Read** – Read the contents of the folder.
- **Insert** – Insert (move or copy) a message into the folder.
- **Write** – Write or change message flags such as 'recent', 'answered', and 'draft'.
- **Set Seen Flag** – Preserve the 'seen' and 'recent' status of messages.
- **Post** – Post a message in the folder by sending the message to the mailboxes submission address.
- **Create** – Create a new sub-folder within the shared folder.
- **Delete** – Delete a message and/or the folder itself.
- **Administer** – A user with 'Administer' privileges can set the permissions on the folder as if they were the real owner.

- **Setting SCO*office* Mail Connector folder synchronization options**

As mentioned earlier in this guide the PST file resides on your computer and is used as an intermediate storage/work location for messages as they flow between Outlook and the SCO*office* Mail Server via the Mail Connector. Folder synchronization means that the contents of the PST file (local copy of your folders) are synchronized with the SCO*office* Mail Server folders. By default, folders are set to synchronize with the SCOoffice Mail Server every time you select the folder in the Outlook folder list. However, this may not be appropriate for high traffic folders such as Inbox.

To change synchronization for a folder:

a. Display the Outlook folders list by clicking on 'View' then 'Folder List' in the Outlook menu.

b. Click on the folder in the folder list that you with to share.

c. Click the 'Folder' button in the SCO*office* Mail Connector toolbar. The 'SCO*office* Mail Folder Options' dialog window will be displayed. Set options as appropriate.