

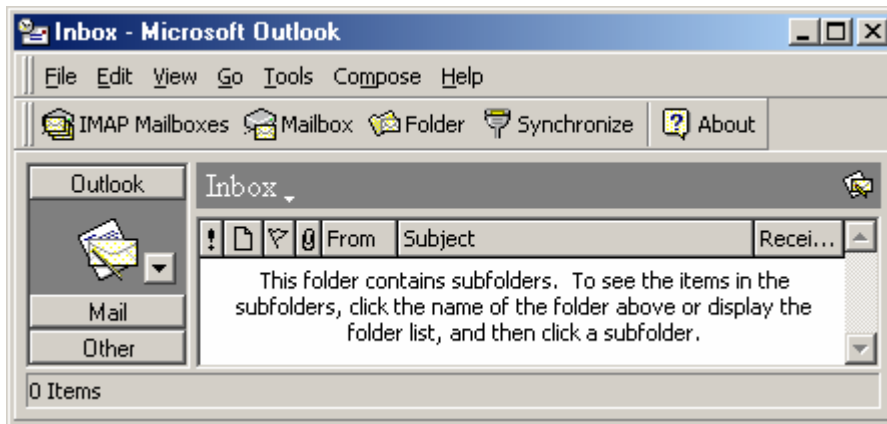
# **SCO Insight Connector Installation Guide For Outlook XP**

# SCO Insight Connector Installation Guide for Outlook XP

## Introduction

The SCO Insight Connector was designed for the purpose of replacing high maintenance and high total cost of ownership (TCO) MS Exchange servers with the low maintenance SCO Volution Messaging Server. The Volution Messaging Server when used with the Insight Connector can provide virtually all of the same functionality as the Exchange server. It is easily maintained and can be purchased for a fraction of the cost of its Exchange counterpart. Exchange services are not required for any part of the Insight Connector functions.

When the Insight Connector is installed the Connector toolbar is added to the Outlook toolbar area as shown in the following screenshot. The buttons in the toolbar are 'IMAP Mailboxes', 'Mailbox', 'Folder', 'Synchronize' and 'About'. These buttons are used to configure and control Connector actions. You will be using these buttons in the configuration steps that follow.



## Before You Begin

- This guide was written specifically for Microsoft Outlook XP. If you are using Microsoft Outlook 97, Outlook 98 or Outlook 2000 refer to the document titled "SCO Insight Connector Installation Guide for Microsoft Outlook 97, 98 and 2000".
- Verify that you already have an email account activated on your SCO Volution Messaging Server.

- You will need the following information to configure the Insight Connector. This information should be provided to you by your system administrator.
  - The fully qualified hostname of the SCO Volution Messaging Server.
  - Your Volution Messaging Server email ID and password.
  - Your email address.
  - Your license key for the Insight Connector.
- If you will be migrating email from a Microsoft Exchange server to the SCO Volution Messaging Server be sure that the Exchange mailbox is configured in Outlook before you install the Insight Connector. Additionally, and most importantly, the Insight Connector must be configured to use a PST file for the SCO Volution Messaging Server mail account that is different from the PST file used for the Microsoft Exchange mail account.

See step 6 in the section titled 'Insight Connector Email Account Configuration'. Alternatively see step 1 in the section titled 'Manual Configuration of the SCO Insight Connector'. Also see 'Migration from MS Exchange Server to SCO Volution Messaging Server' in the section titled 'Using the SCO Insight Connector'.

## **SCO Insight Connector Installation and Upgrade**

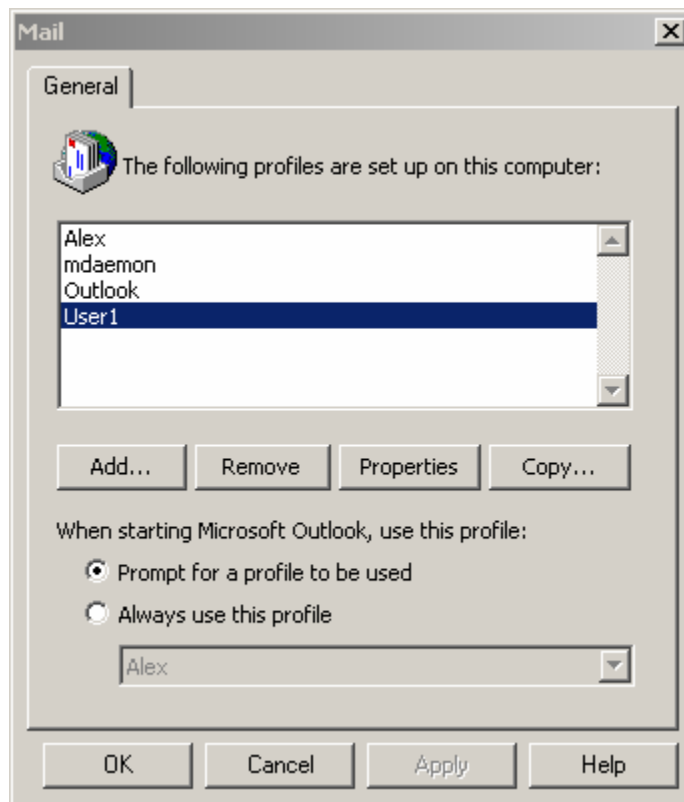
1. Close Outlook if it is running.
2. Download the Insight Connector zip file and extract the contents using an unzip/decompress utility, such as WinZip.
3. If you are upgrading from a previous version of the Insight Connector do NOT remove the old version. Instead, make a backup copy of the InsightConnector.dll and cclient.dll files which are located in the 'Program Files\SCO' directory.
4. Run the resulting Insight Connector setup program to install the Insight Connector files. Enter the Insight Connector license key when prompted to do so.
5. If you are upgrading from a previous version of the Insight Connector you are done!

## **SCO Insight Connector Email Account Configuration**

1. Setting up a new Profile.

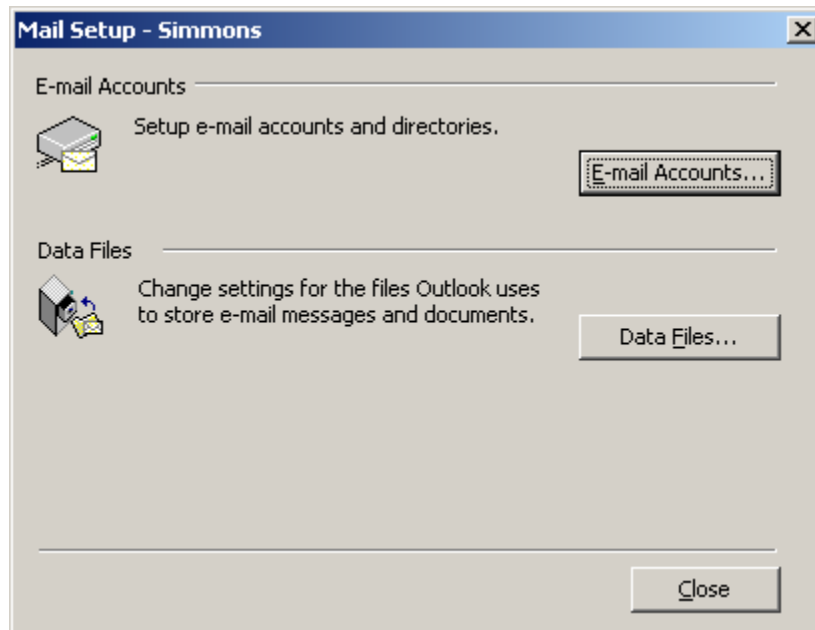
We recommend that you create a new Profile along with a new PST (Personal Storage) file.

- In the Windows toolbar click on 'Start' then 'Control Panel'. In the Control Panel double click Mail (in Classic view).
- Click 'Show Profiles'.
- Click 'Add' to add a new Profile.
- Enter a name for the new profile and click 'OK'.
- Select 'Add a new e-mail account' and click 'Next'.
- Select the 'POP3' Server Type and click 'Next'. Be sure you select 'POP3' here and not 'IMAP'. The 'Internet E-mail Settings (POP3)' dialog will appear.
  - a. Enter your first and last name in the 'Your Name' field.
  - b. Enter your e-mail address in the 'E-mail Address' field.
  - c. Enter a fake name such as 'none' for the incoming (POP3) mail server.
  - d. Enter the fully qualified hostname of your SCO Volution Messaging Server for the outgoing (SMTP) mail server.
  - e. Enter your SCO Volution Messaging Server email ID login and password in the 'User Name' and 'Password' fields.
- Click 'Next'. The following page will inform you of a successful configuration. Click 'Finish'.
- You will now notice that your profile has been added to the list. 'User1' in this example.

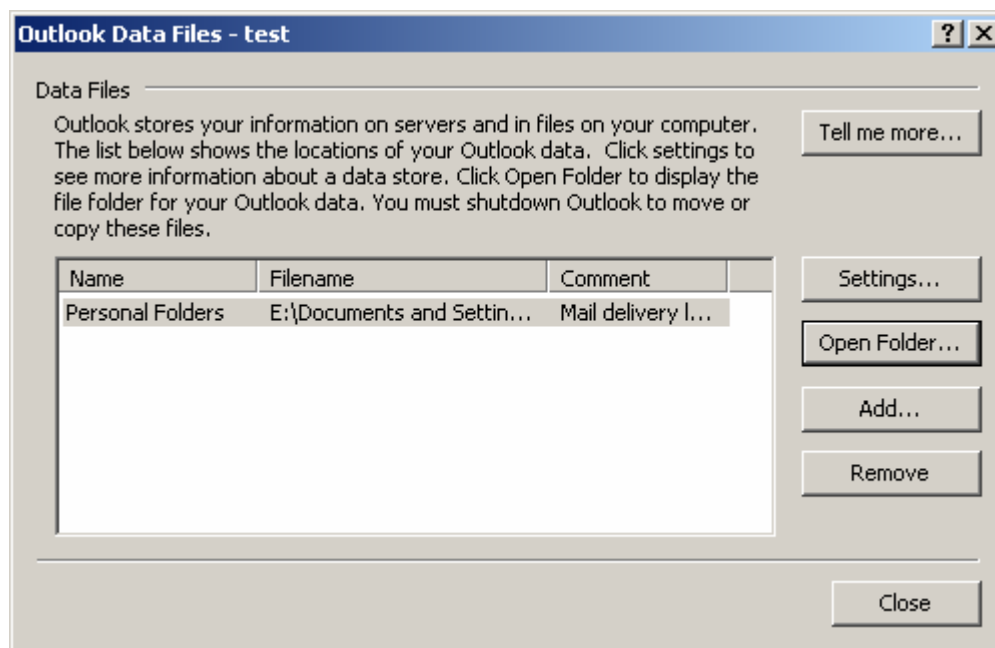


## 2. Setting up the PST file.

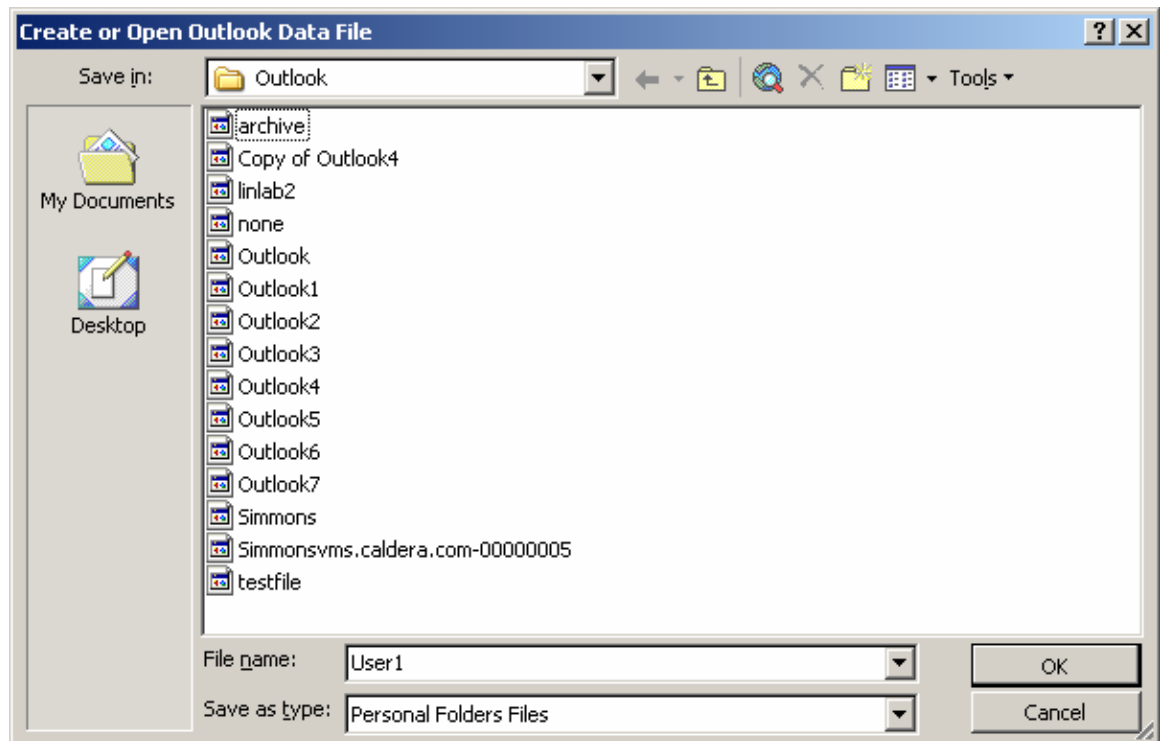
- Select your profile from the list by clicking on it. It will be highlighted as shown in the above screenshot. Then click the 'Properties' button. This dialog window will appear. Click the 'Data Files...' button.



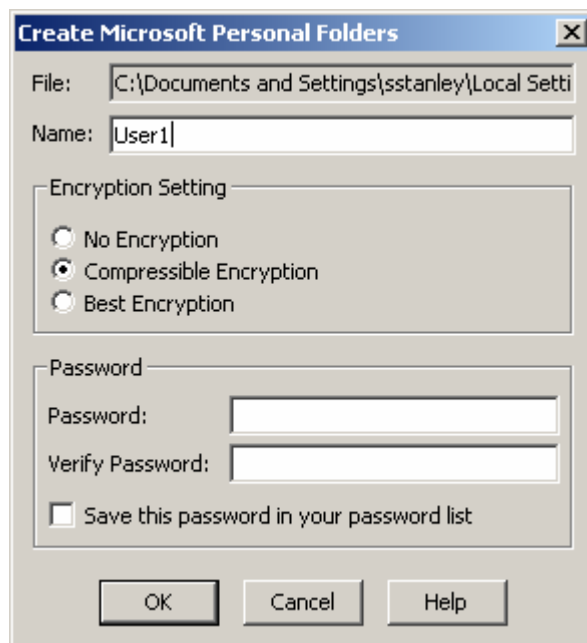
- The following dialog will be displayed. If you wish to use the PST file shown click 'Close'. Otherwise click 'Add', and 'OK'.



- It will then ask you to name your PST file. Select an existing PST file from the list or type in a name for a new PST file in the 'File name' field. In this example we created a new PST file named 'User1'. Click 'Ok'

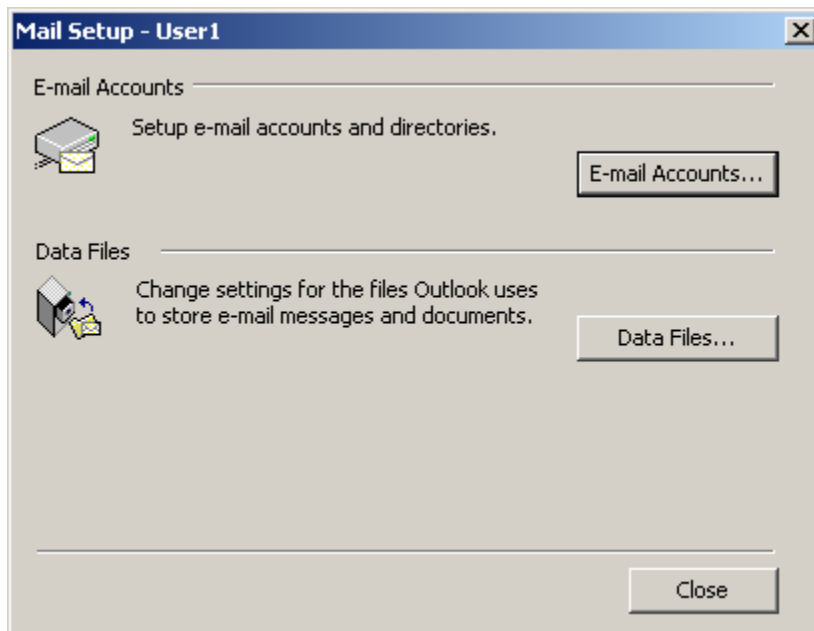


- The following dialog will be displayed. Here, you are asked to name your PST file. To make it simpler, name your PST file the same name as the profile. In this case 'User1'. Click 'OK' and then 'Close'.

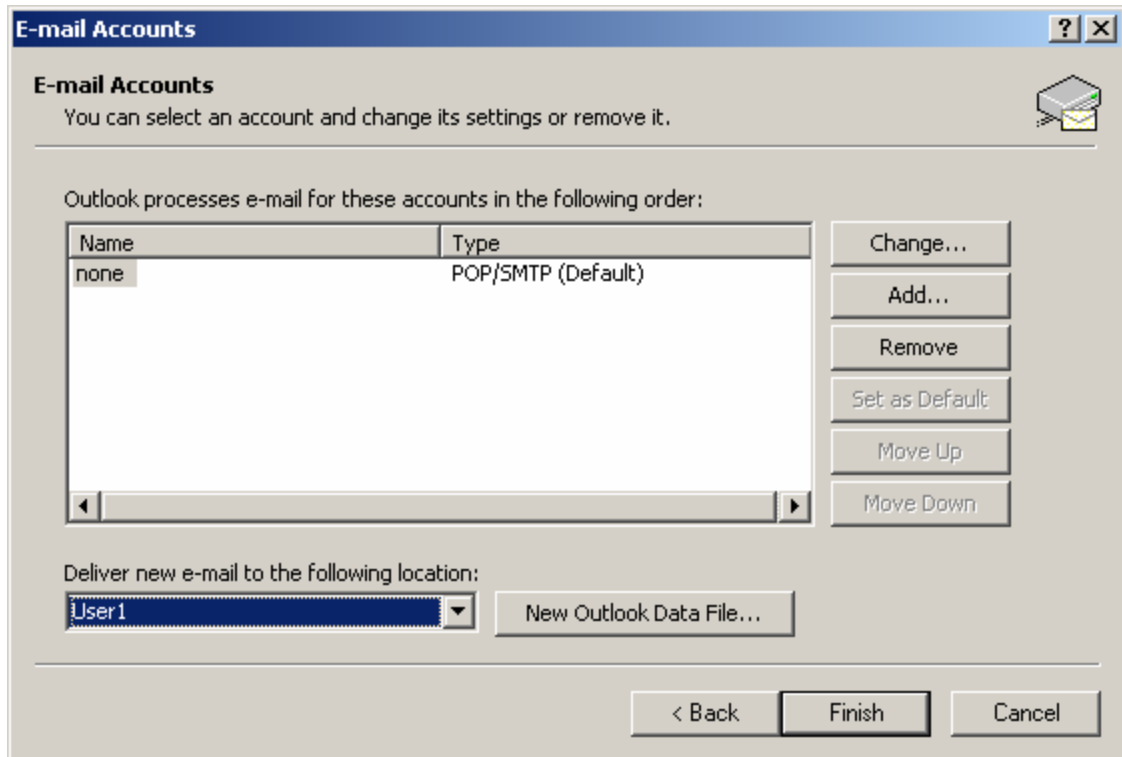


3. Designate the PST file and the local email delivery location.

You will return to following dialog after completing the step above.



- Click 'E-mail Accounts'.
- Select 'View or change existing e-mail accounts'. Click 'Next'. The following dialog will be displayed.



- Set 'Deliver new e-mail to the following location:' to the PST file you created in the previous step. In this example the PST file is named 'User1'.
- Click 'Finish'.
- Click 'OK'.

4. Start Outlook XP.

5. Insight Connector Wizard – specify the IMAP server.

When Outlook XP is run for the first time after the Insight Connector has been installed, the Insight Connector Wizard should start automatically. If for some reason, the Insight Connector Wizard does not start proceed to the section titled '**Manual Configuration of the Insight Connector**'. The Insight Connector Wizard configures the Insight Connector to use the email server and email account configured in the previous steps. Read the introductory panel and click 'Next'. The subsequent dialog window will prompt for the following information. Enter the information and proceed to the next step.

**Hostname:** Hostname of the SCO Volution Messaging Server.

**Port 143:** Do not alter; this is the default port for the IMAP mail server.

**Login:** Your SCO Volution Messaging Server email ID.

**Password:** The password for your email ID.

6. Insight Connector Wizard – test server connectivity



Now press the 'ping' button. 'Ping' will check for connectivity and authentication. If ping is unsuccessful your Outlook client may not have network connectivity, or the SCO Volution Messaging Server was unable to authenticate the username and password you entered, or both. If you choose to quit at this time the Insight Connector wizard will ask 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 using the '*Manual Configuration of the Insight Connector*' instructions contained within this document. Otherwise, click 'Next'.

7. Insight Connector Wizard – assign a PST (Personal Storage) file.

To use an existing PST file click the radio button to select 'Use one of the existing PST files' then click on the PST file in the list that you wish to use such as 'Personal Folders'.

If you do not want to use an existing PST file you have the option to create a brand new PST file. Click on the 'Add a new PST file' radio button.

Click 'Next'.

8. Insight Connector Wizard – finishing up.

This dialog window describes the manual configuration of the Internet Mail service and POP3/SMTP email account. The steps above had you create such a configuration. Ignore the instructions in this dialog window and click 'Next' to finish the Insight Connector Wizard.

For complete instructions on manually configuring Outlook and the Insight Connector please refer to the '*Manual Configuration of the Insight Connector*' section of this guide.

9. Restart Outlook.

10. Configure email account synchronization.

POP3/SMTP email accounts managed by the Insight Connector are synchronized by the Insight Connector, not Outlook. Outlook synchronization of these accounts must be disabled otherwise you may receive duplicate messages.

Additional POP3/SMTP mail accounts not managed by the Insight Connector should continue to be synchronized by Outlook.

Disabling Outlook synchronization

- Click on the 'Tools' menu item and select 'Options'.
- Click on the 'Mail Setup' tab.

- Click on 'Send/Receive'.
- Select your SCO Volution Messaging Server account from the 'Group Name' list or select 'All Accounts' if your account does not appear.
- Click 'Edit' and select your account from the list (checked).
- Deselect 'Receive mail items'.
- Click 'Ok'.
- Click 'Close'.
- Click 'Ok'.

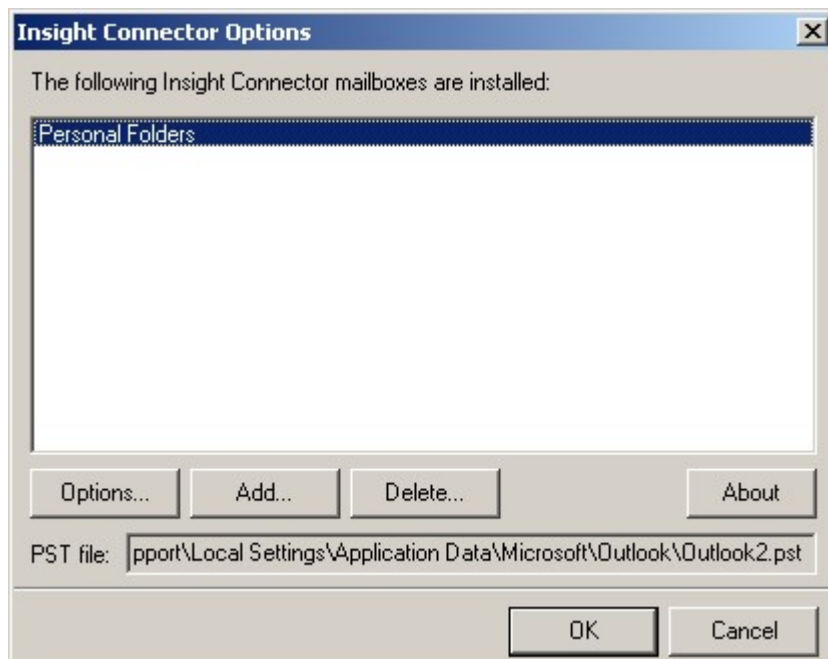
#### Enabling Insight Connector synchronization

- Select your Insight Connector IMAP Inbox from the Outlook folders list.
- Click on the 'Folder' button in the Insight Connector toolbar. The 'Insight Folder Options' dialog will be displayed. This dialog allows you to set message synchronization options, folder access permissions and the IMAP server from which the messages are synchronized.

## Manual Configuration of the SCO Insight Connector

### 2. Setting up the IMAP mailbox.

In Outlook click the 'IMAP Mailboxes' button on the Insight Connector toolbar. Click 'Add' and select an existing PST file for use with the Insight Connector or create a new PST file using the radio button options. If you decide to create a new mailbox the default name will be 'SCO Volution Messaging Server Mailbox' but it can be altered or renamed according to your preferences. Click 'Ok' to complete the operation.



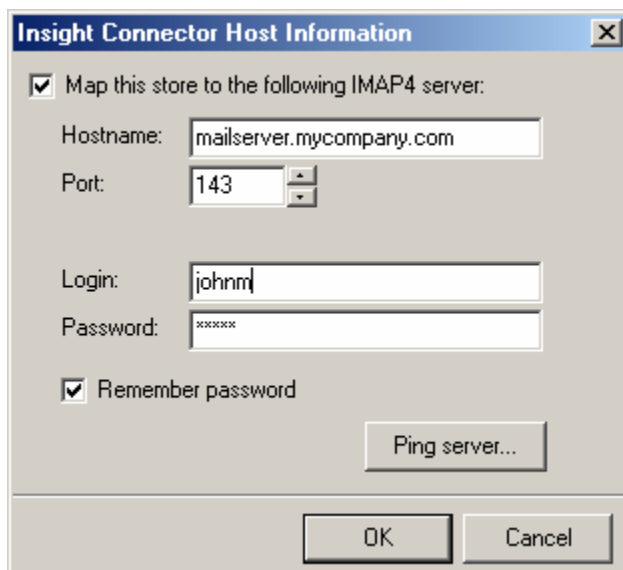
Next highlight the PST of your choice (normally there is only one in the list) and click the 'Options' button at bottom of the dialog box.

Enter the fully qualified hostname of the SCO Volution Messaging Server in the field named 'Hostname'. Now enter the following information:

**Login:** Your SCO Volution Messaging Server email ID

**Password:** The password for your email ID on the SCO Volution Messaging Server

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



Now press the 'Ping' button. 'Ping' will check for connectivity and authentication. If ping is unsuccessful your Outlook client may not have network connectivity, or the Volution Messaging Server was unable to authenticate the username and password you entered, or both.

### 3. Setting up SMTP for Insight Connector (Outlook POP3/SMTP email account.).

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

To setup POP3/SMTP for Outlook XP:

- Click on the Outlook 'Tools' menu item and select 'E-mail Accounts'.

- Select 'Add a new e-mail account' and click 'Next'.
  - Select the 'POP3' Server Type and click 'Next'. Be sure to select POP3 here and not IMAP. The 'Internet E-mail Settings (POP3)' dialog will appear.
    - a. Enter your first and last name in the 'Your Name' field.
    - b. Enter your e-mail address in the 'E-mail Address' field.
    - c. Enter a fake name such as 'none' for the incoming (POP3) mail server.
    - d. Enter the fully qualified hostname of your SCO Volution Messaging Server for the outgoing (SMTP) mail server.
    - e. Enter your SCO Volution Messaging Server email ID login and password in the 'User Name' and 'Password' fields.
  - Click 'Next'. The following page will inform you of a successful configuration. Click 'Finish'.
4. Restart Outlook XP.
  5. Configure email account synchronization.

POP3/SMTP email accounts managed by the Insight Connector are synchronized by the Insight Connector, not Outlook. Outlook synchronization of these accounts must be disabled otherwise you may receive duplicate messages.

Additional POP3/SMTP mail accounts not managed by the Insight Connector should continue to be synchronized by Outlook.

#### Disabling Outlook synchronization

- Click on the 'Tools' menu item and select 'Options'.
- Click on the 'Mail Setup' tab.
- Click on 'Send/Receive'.
- Select your SCO Volution Messaging Server account from the 'Group Name' list or select 'All Accounts' if your account does not appear.
- Click 'Edit' and select your account from the list (checked).
- Deselect 'Receive mail items'.
- Click 'Ok'.
- Click 'Close'.
- Click 'Ok'.

#### Enabling Insight Connector synchronization

- Select your Insight Connector IMAP Inbox from the Outlook folders list.
- Click on the 'Folder' button in the Insight Connector toolbar. The 'Insight Folder Options' dialog will be displayed. This dialog allows you to set message synchronization options, folder access permissions and the IMAP server from which the messages are synchronized.

## Using the SCO Insight Connector

- Determining the version of the SCO Insight Connector

If you ever need to find the version of Insight Connector you are running, click the 'About' button on the Insight Connector toolbar. Please note the Version number and the number following the text 'All Rights Reserved'.



- Migration from MS Exchange Server to SCO Volution Messaging Server

If you have correctly configured Outlook both the Exchange mailbox folders and the SCO Volution Messaging Server mailbox folder will appear in the Outlook mail folder list. Simply drag or copy the Exchange folders to the SCO Volution Messaging Server **Inbox**.

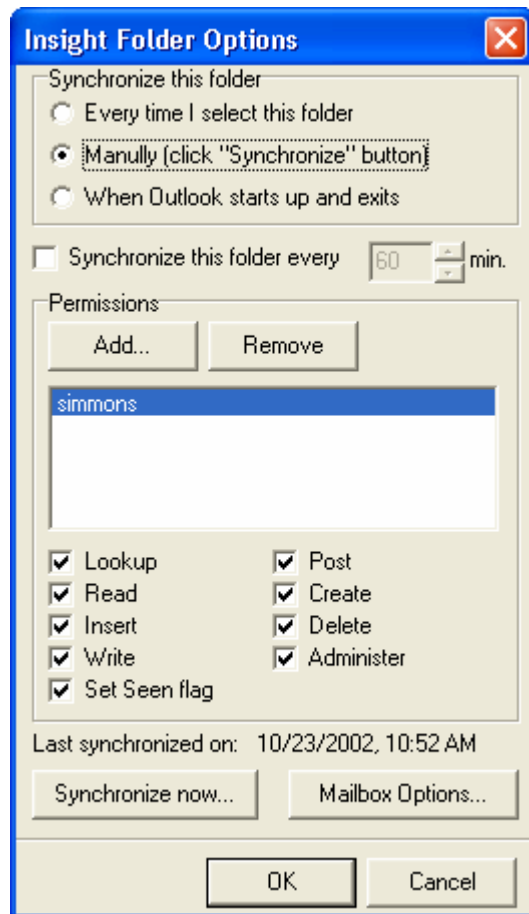
After the initial synchronization is complete, the Exchange server can be dismantled and the Exchange service can be removed from Outlook client. Exchange services in Outlook are not required for the SCO Insight Connector .

- Using Shared Folders

The SCO Insight Connector allows you to share your mail folders with other SCO Volution Messaging Server users. You can also assign access permissions to each user with whom you have shared your folder(s).

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 wish to share.
- c. Click on 'Folder' in the SCO Insight Connector toolbar. The following dialog window will be displayed. This dialog window is used to add and remove specific users or 'anyone' from the list of users who are allowed to access your folder. By selecting a user in the list you are also able to assign or remove access rights for the user by checking or un-checking the permission boxes.



By default, the 'Permissions' list box will list the owner of the folder with all access rights assigned (enabled). Note that permissions can not be viewed or assigned to empty folders.

- d. When adding a user to the list of people who have access to the shared folder you must enter their SCO Volution Messaging Server email ID rather than the user part of their email address. In most cases these will be the same. In the case where they are different the person to whom you are granting access will need to provide you with their SCO Volution Messaging Server email ID.

The special user 'anyone' can be used to share a folder with all users.

- e. 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. For example, sending a message to 'simmons+SalesForecast@myemailserver.com' will post a message to the 'SalesForecast' folder in the mailbox belonging to 'simmons'.
- **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.