



Exchangel!

Usage Guide

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INTRODUCTION

What is ExchangeIt!?

ExchangeIt! provides collaboration services running as a fully integrated service on the Net Integrator server. *ExchangeIt!* works seamlessly with Microsoft Outlook to help you create, organize and share information quickly and easily.

Thanks to its complete integration into the Net Integrator operating system (“NIOS”), *ExchangeIt!* is able to take full advantage of advanced NIOS technologies such as NetIntelligence, idb, and System ER. This makes *ExchangeIt!* an easy collaboration system to set up, maintain and backup.

Outlook + ExchangeIt! - What do they do?

In order for Outlook to work with *ExchangeIt!* a small Outlook plug-in, developed by Net Integration and available free of charge, needs to be installed on every workstation that requires *ExchangeIt!* functionality. (*ExchangeIt!* licenses is handled on the server).

When you use the Microsoft Outlook mail client with *ExchangeIt!*, the following features are added to its functionality:

- **Schedule Sharing:** Personal Outlook calendars can be shared with other *ExchangeIt!* users.
- **Group Schedules:** Shared calendars can be created for multiple users (or Net Integrator “teams”); each team member will have access to the shared calendar. These shared calendars are the equivalent of shared public resources, and can relate to people or to conference rooms and other meeting resources such as video projectors.
- **Meeting Invitations:** Users can schedule meetings with other users and also book conference rooms and other meeting resources. Invite users to meetings; when they accept, the event appears in their calendar. View the free/busy times for meeting invitees and resources when scheduling a meeting.
- **Contact List Sharing:** Share personal contact lists with other users.
- **Group Contact Lists:** Maintain shared contact lists that everyone can access and contribute to.
- **Task List Sharing:** Share personal task lists with other users.
- **Group Task Lists:** Maintain shared task lists that all users or team members can contribute to.
- **Journal Sharing:** Share personal Outlook journals with other users.
- **Notes Sharing:** Share Outlook notes with other users.
- **Group Notes Sharing:** Maintain shared notes folders that all users or team members can access and contribute to.
- **Access Control Lists and Shared Folder Permissions:** Give other users or teams permission to view, edit or change calendars, contact lists, notes, journals and task lists. Each user or team can have “Read,” “Read/Write” or “Read/Write/Admin” rights to a folder.

- **Outlook Synchronization:** Information contained within Outlook personal folders (with the exception of deleted items and email messages) is uploaded and synchronized with the *ExchangeIt!* database. This yields the following advantages:
 - Backup – if a workstation’s Outlook data is lost, it can easily be re-synchronized from the server. The *ExchangeIt!* database is also backed up by the idb backup system on the Net Integrator server.
 - RoamingAccess – Outlook will have your synchronized personal folders even if you are on a different computer.
 - WebAccess – *ExchangeIt!* data is synchronized with the Net Integrator. WebMail web-based mail and collaboration interface. This allows easy access to a user’s Outlook data from any browser.
NOTE: This feature is NOT available in the *ExchangeIt!* 1.0 release, but will be available in a future release.

NOTE: *ExchangeIt!* requires Microsoft Outlook 2000 or Microsoft Outlook 2002 running on a Windows 2000 or Windows XP platform.

Purpose Of This Manual

This manual will focus on the use of Outlook 2000 and Outlook 2002 with *ExchangeIt!*

Please refer to your Microsoft Outlook manual for the Outlook specific functionalities not covered in this manual.

INSTALLATION

Installing ExchangeIt!

See your System Administrator or Net Integrator representative for an *ExchangeIt!* client.

SETTING UP YOUR OUTLOOK CLIENT

Please Note: In order to use *ExchangeIt!*, you must have a user account on the Net Integrator.

Software Requirements: *ExchangeIt!* requires Microsoft Outlook 2000 or Microsoft Outlook 2002 running on a Windows 2000 or Windows XP platform. *ExchangeIt!* is not compatible with any version of Microsoft Outlook Express, Microsoft Outlook 98 or other mail packages.

Configuring Microsoft Outlook 2000

Please Note: For Microsoft Outlook 2002, see “Configuring Microsoft Outlook 2002” below.

Please Note: You need to have Microsoft's Web Publishing Wizard installed in order for the free/busy services to work with Outlook 2000 on Windows 2000. If this has not already been installed on your computer you can download the installation file from: <http://www.microsoft.com/downloads/release.asp?ReleaseID=22658>

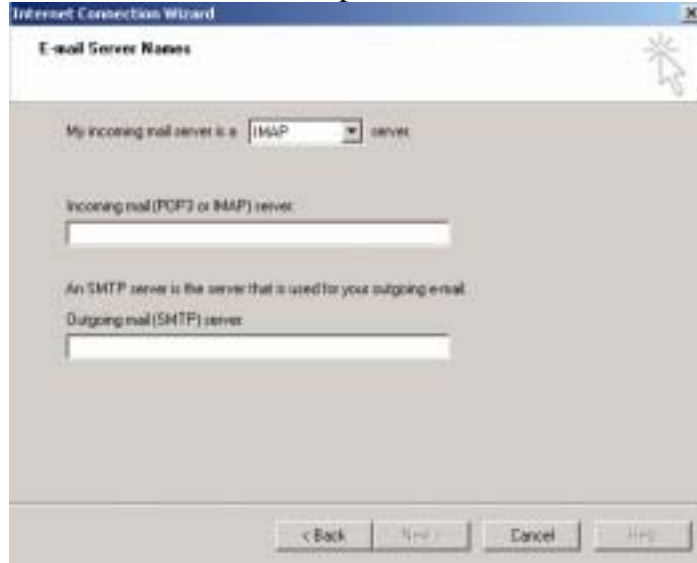
Configuring E-mail

If you are already using Outlook 2000 for your e-mail in *Internet mode*, select *Tools > Accounts*. Click on *Add > Mail*. The *Internet Connection Wizard* screen appears. Jump to Step five (5).

If this is your first time using Outlook 2000, start at step one (1).

1. Open Microsoft Outlook 2000.
Please Note: Corporate Mode Microsoft Outlook is not supported. Please go to *Tools > Options > Mail Delivery* and click on *Reconfigure Mail Support* to reconfigure Outlook to Internet Only mode. [If you are unsure how to accomplish this, please refer to your Office 2000 documentation].
2. The *User Name* screen appears.
3. Enter your *Name* and *Initials*. Click the *OK* button.
4. The *Internet Connection Wizard* screen appears.
5. Enter your *Display name* (this is the name that will appear on your outgoing e-mail). Click the *Next* button.
6. Enter your *E-mail Address*. Click the *Next* button.

7. The next screen will ask, “*My incoming e-mail server is a ____ server.*” Select *IMAP* from the server drop-down list.



- Please Note:** We recommend that you use an IMAP e-mail server. However, *ExchangeIt!* will work with POP3 e-mail servers, but you will lose your ability to have your mail remotely accessible.
8. Enter the name of your *incoming mail server* (this is the name of the Net Integrator).
 9. Enter the name of your *outgoing mail server* (this is the name of the Net Integrator).
 10. Click the *Next* button.
 11. Enter your *Account name* and *Password* (password is optional).
- Please Note:** Ensure that the *Log on Secure Password Authentication (SPA)* is not checked.

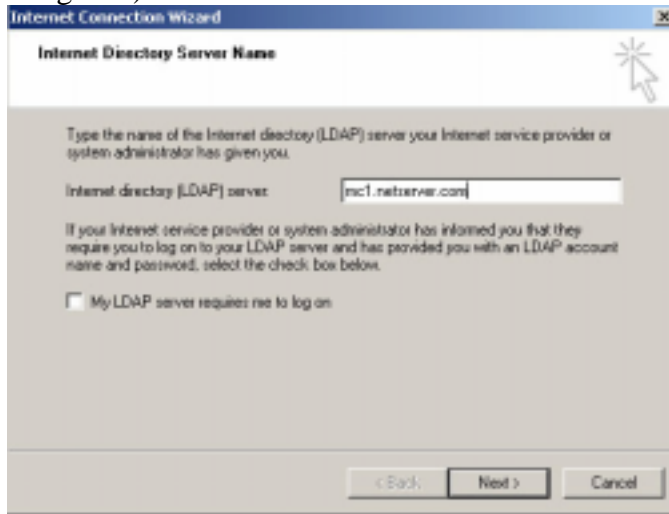


12. Click the *Next* button.
13. Select which method you want to use to connect to the Internet (local area network).

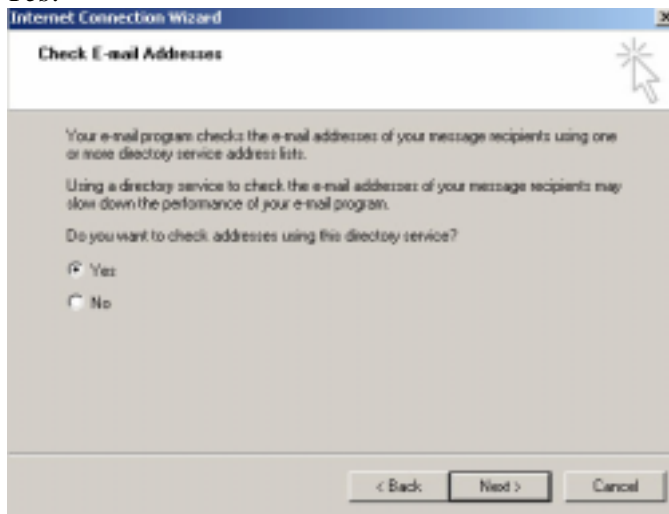
14. Click the *Next* button.
15. Click the *Finish* button.

Directory Services Setup

1. In Outlook, select *Tools > Accounts*.
2. Select *Add > Directory Services*.
3. The *Internet Connection Wizard* screen appears.
4. Enter your *Internet directory (LDAP) server* name (this is the name of the Net Integrator). Click *Next*.



5. It will ask, “Do you want to check Addresses using this directory service?” Select *Yes*.



6. Click the *Next* button.
7. Click the *Finish* button.
8. Click the *Close* button.
9. Close Outlook.

Configuring Microsoft Outlook 2002

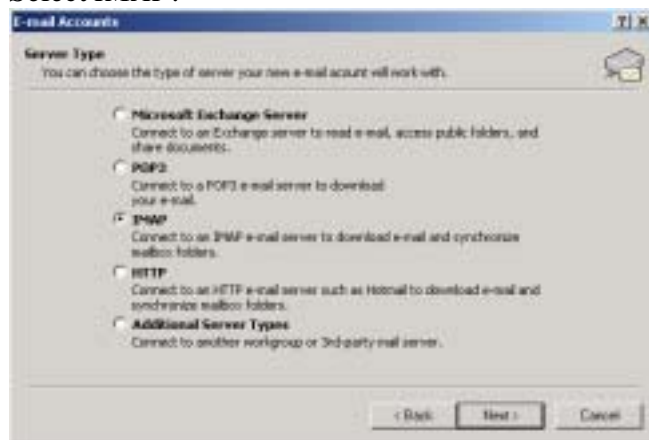
Please Note: For Microsoft Outlook 2000, see “Configuring Outlook 2000” above.

Configuring E-mail

If you are already using Outlook 2002, select *Tools > Accounts*, then click on *Add > Mail*. The *Internet Connection Wizard* screen appears. Jump to Step five (5).

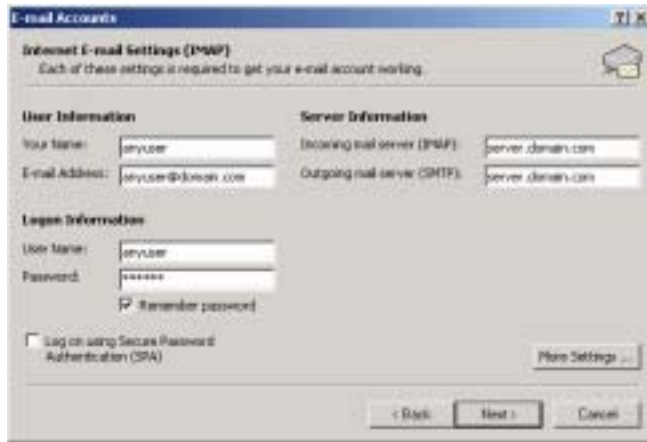
If this is your first time using Outlook 2002, start at step one (1).

1. Open Microsoft Outlook 2002.
2. The *Outlook 2002 Startup* screen appears.
3. Click the *Next* button.
4. The *Account Configuration* screen appears.
5. Click the *Yes* button.
6. Click the *Next* button.
7. The *Email Accounts* screen appears asking you to select your e-mail server type. Select *IMAP*.



Please Note: We recommend that you use an IMAP e-mail server. However, *ExchangeIt!* will work with POP3 e-mail servers.

8. Click *Next*.
9. Enter your *User Information*, *Server Information* and *Logon Information*.



Please Note: Ensure that the *Log on Secure Password Authentication (SPA)* is not checked.

10. Click the *Next* button.

11. Click the *Finish* button.

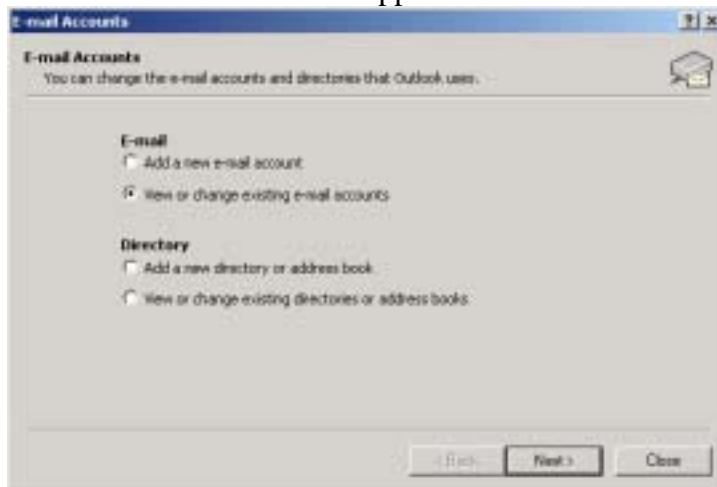
12. The *User Name* screen appears. Enter your *Name* and *Initials*. Click the *OK* button.

Please Note: The *User Name* screen only appears if it your first time using Outlook.

Directory Services Setup

1. From Outlook, select *Tools > Email Accounts*.

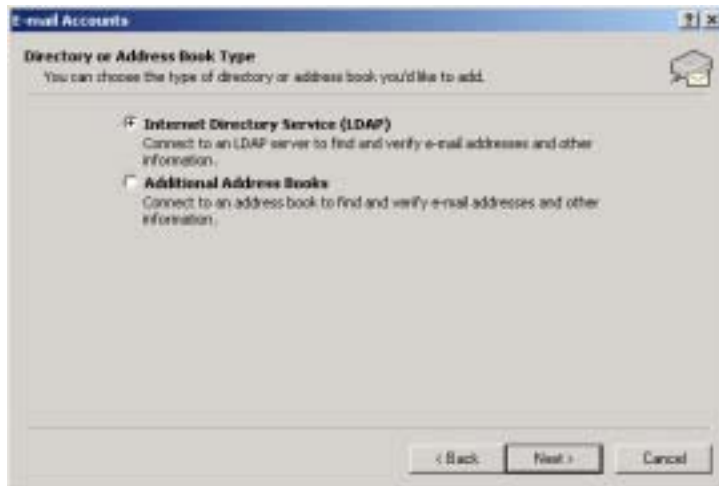
2. The *Email Accounts* screen appears.



3. Under *Directory*, choose *Add a new directory or address book*.

4. Click the *Next* button.

5. Select *Internet Directory Service (LDAP)*.



6. Click the *Next* button.
7. Enter the *Server* name.



8. Click the *Next* button.
9. The *Add Email Account* screen appears asking if it is okay to exit Outlook. Click the *OK* button.
10. Click the *Finish* button.

Installing Client Plug-in

Please Note: You must be logged in as the Administrator to install the *ExchangeIt!* plug-in. Installing the plug-in using a user account may not install the plug-in properly.

Please Note: You must configure Outlook before installing the *ExchangeIt!* plug-in.

1. Go to where you placed the *ExchangeIt!* plug-in.
2. Double-click the *ExchangeIt!* plug-in.

3. The *ExchangeIt! Plug-in for Microsoft Outlook Setup: License Agreement* window displays.
4. Click the *I Agree* button to accept license.
5. The *ExchangeIt! Plug-in for Microsoft Outlook Setup: Installation Folder* window displays.
6. Click the *Install* button to install the *ExchangeIt!* plug-in in the default destination, **or** select a different folder by using the *Browse* button then click on the *Install* button.
7. Once installation is complete, click the *Close* button.

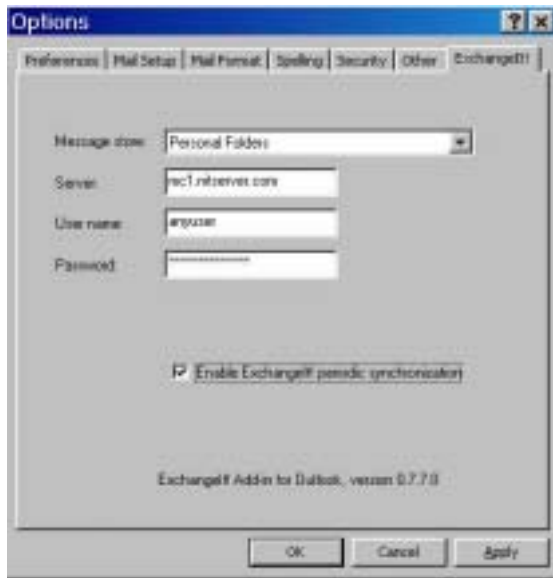
Configure Outlook to use ExchangeIt!

1. Open Outlook.
2. The *ExchangeIt! Login* window displays:
3. Select the Message Store you wish to have synchronized. The default store is “Personal Folders.”
4. Enter the name of your Net Integrator *Server*. The default name is calendar.
5. Enter your *User name* and *Password*.
6. Click the *OK* button.



To Enable Synchronization

1. From the Outlook *Tools* menu, select *Options*.
2. Click on the *ExchangeIt!* tab.
3. Ensure that the *Enable ExchangeIt! periodic synchronization* is checked.



4. Click on the OK button.

EXCHANGEIT OUTLOOK FEATURES

The Folder List

Folders in Outlook can help you manage your mail by filing messages based on certain criteria that are at your discretion.

The folders within Outlook are used for storing items that you create in the various Outlook modules: e-mail messages, calendar items, contact names, tasks and sub-folders. Each module has its own folder that you can see in the Folder List. The Folder List is simply a list of the folders accessible from Outlook (see Figure 1).

For more details on these folders, see the next section, “Folders Accessible from Outlook”.

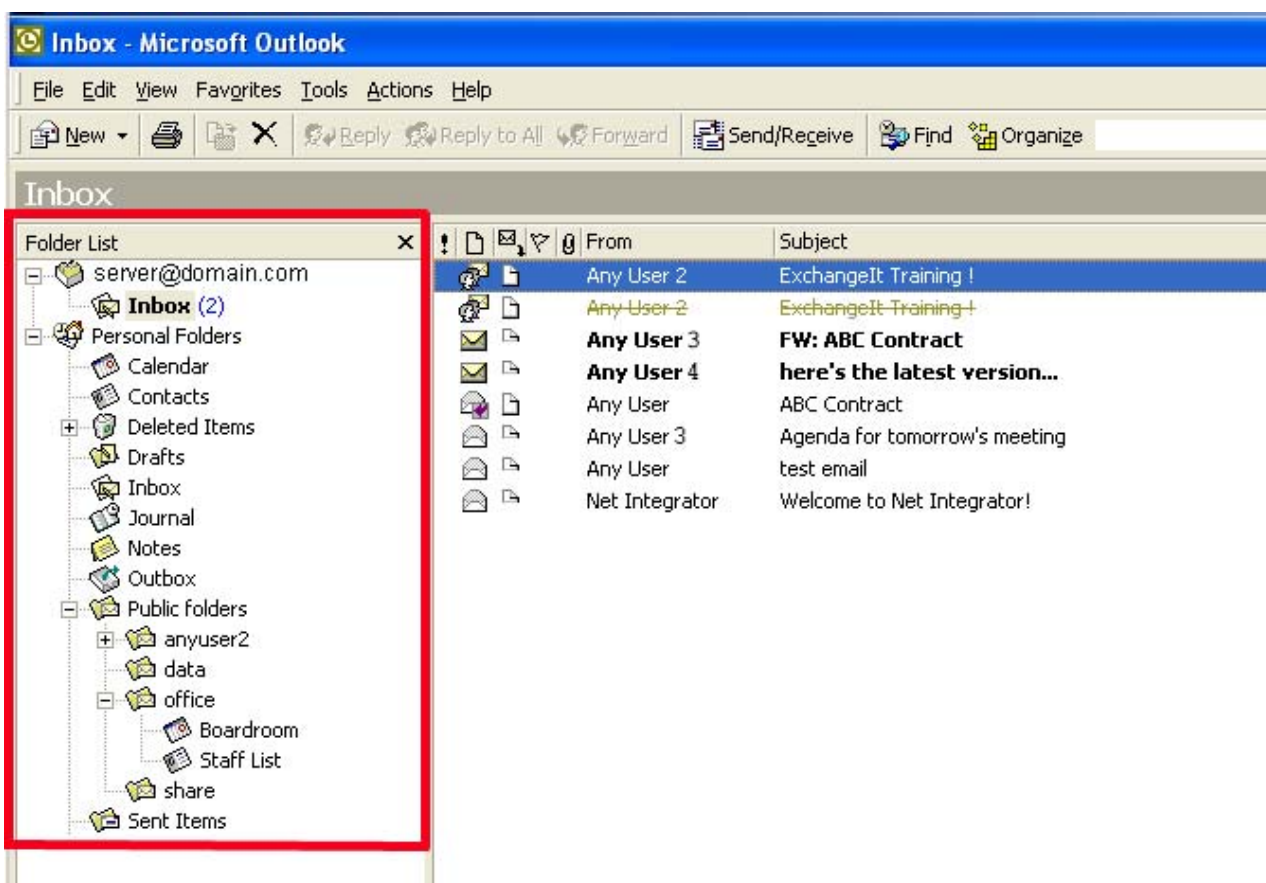


Figure 1

The Folder List in Outlook displays all of the folders that are located in your *ExchangeIt!* server account, Public Folders, as well as those located in your Personal Folders.

To see the Folder List select *View* from the Outlook toolbar and click on *Folder List*.

Folders Accessible From Outlook

The Folder List in Outlook will allow you to see all of the folders that Outlook can access. These folders can be stored on the *ExchangeIt!* server, your hard drive or a network share.

Outlook can access any folders and subfolders in your account on the *ExchangeIt!* server, as well as Public Folders. Folders not on the *ExchangeIt!* server that Outlook can access are your Personal Folders.

IMAP Mail Folder

The folder entitled *Inbox* under your server name (see Figure 2) in the Folder List view is the root folder in your account on the *ExchangeIt!* server.

IMPORTANT: When using Outlook with IMAP, your e-mail will be delivered to the *Inbox* under your server name, and not the *Inbox* under your *Personal Folders*.

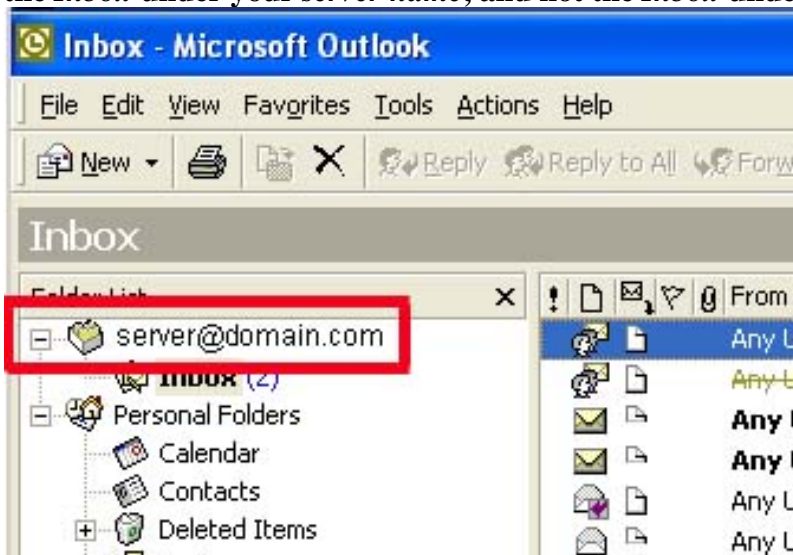


Figure 2

Personal Folders

The Calendar, Contacts, Deleted Items, Drafts, Inbox, Journal, Notes, Outbox, Sent Items and Tasks folders in the "*Outlook today - [Personal Folder]*" or "*Personal Folder*" folder are all subfolders of your Mailbox. (Note: you can create your own subfolders that will be stored on the *ExchangeIt!* server in your account – see Creating Folders).

ExchangeIt! enables you to share any of your Calendar, Contacts, Tasks, Notes or Journal files in your Personal Folders with other user(s). These shared folders are only open to

those who are given permission by the creator or the "owner" of the folder. (By default, no one but you has permission to access your Personal Folders).

Public Folders

Public folders (see Figure 3) are stored on the *ExchangeIt!* server and may not be particular to anyone's account. They serve as a location on the *ExchangeIt!* server for the files shared with you by other users and for files shared by members of a Net Integrator "team account." In Figure 3 for example, a Contacts list for office staff ("Staff List") was created in the team access folder entitled "office" under the Public Folders so that everyone in the office had permission to look at the contents of the folder.

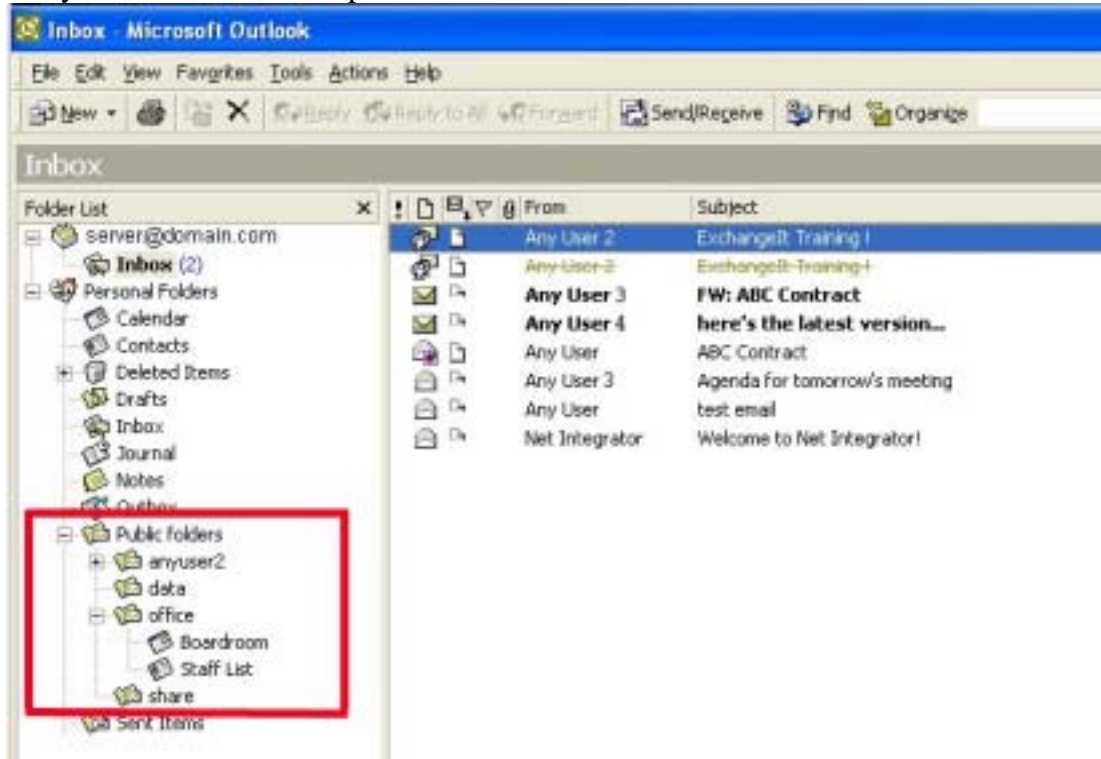


Figure 3

Creating Folders

Personal Folders

You can create new folders in your Personal Folders to share with other users.

1. Right click on *Personal Folders* (see Figure 4).
2. Enter a *Name* for the new folder.
3. Select the type of folder from the *Folder Contains* drop-down list (you can select Appointment, Contact, Journal, Mail, Note or Task Items). (Figure 4b).
4. Click *OK*.

NOTE: for information on sharing the new folder, see Giving Someone Else Access to Your Folders.



Figure 5



Figure 4b

Public Folders

You can create new folders in the Public Folders under team accounts.

1. Right click on the team account folder under *Public Folders* (see Figure 5).
2. Enter a *Name* for the new folder.
3. Select the type of folder from the *Folder Contains* drop-down list (you can select Appointment, Contact, Journal, Mail, Note or Task Items). (Figure 5b).
4. Click *OK*.

NOTE: for information on sharing the new folder, see Giving Someone Else Access to Your Folders.

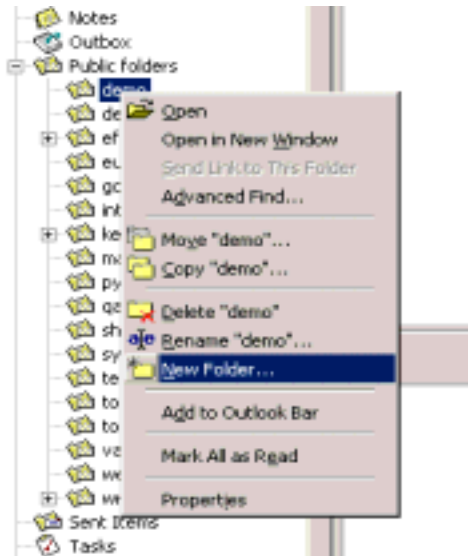


Figure 7

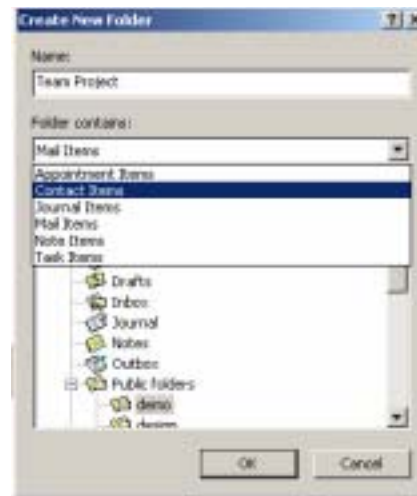


Figure 6b

Using your Exchange! Calendar

Calendar

The calendar folder allows you to keep track of your daily schedule as well as schedule meetings with others. Figure 6 is a screenshot of a typical calendar in daily view. This view allows you to see your schedule for a particular day, along with your Task pad. As you can see, you can create meetings and appointments with the Calendar folder.

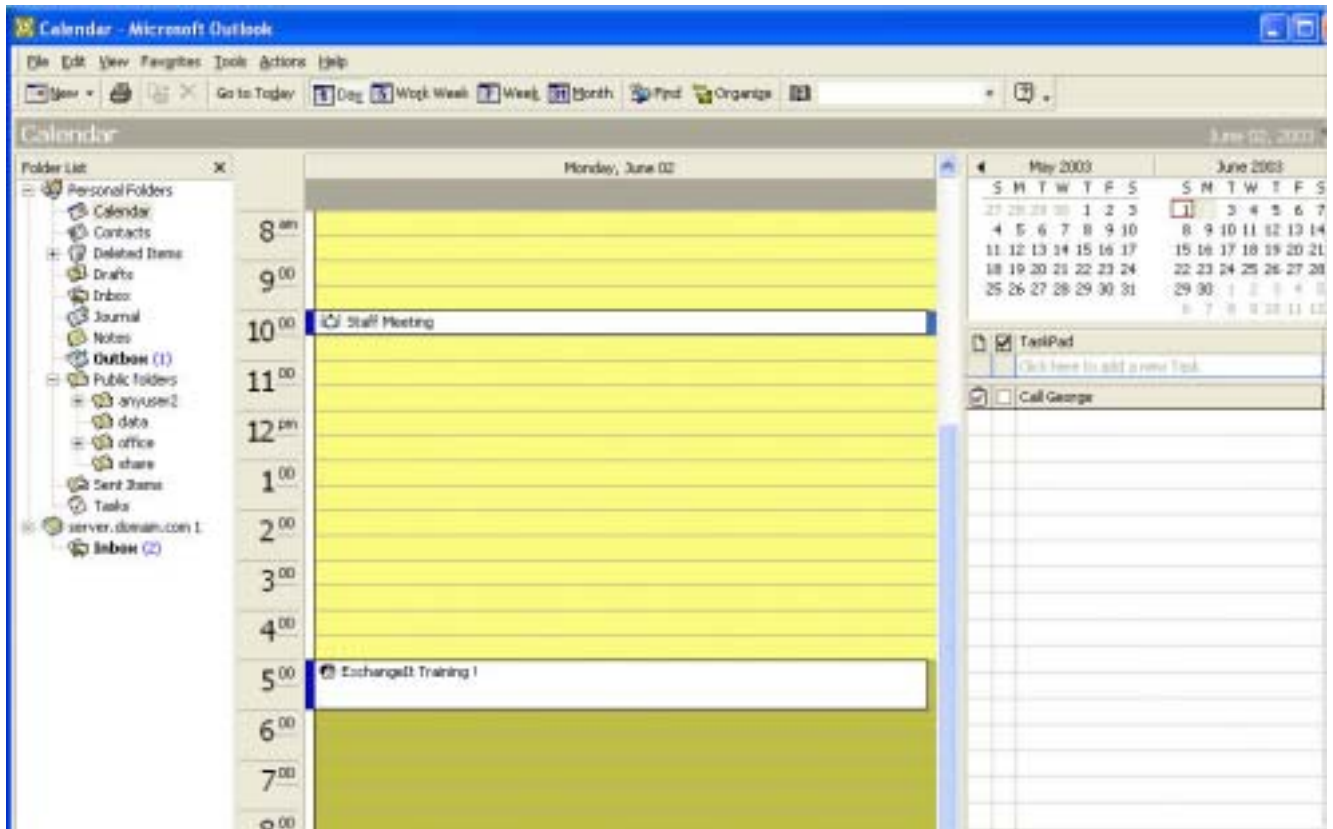


Figure 8

Create a Meeting Request Using Free/Busy

Please Note: You need to have Microsoft's Web Publishing Wizard installed in order for the free/busy services to work with Outlook 2000 on Windows 2000. If this has not already been installed on your computer you can download the installation file from: <http://www.microsoft.com/downloads/release.asp?ReleaseID=22658>

1. Click on the *Calendar* folder from the Folder List.
2. On the monthly calendar, double-click on the date on which the meeting is to occur.
3. An *Appointment Window* will appear (see Figure 7).

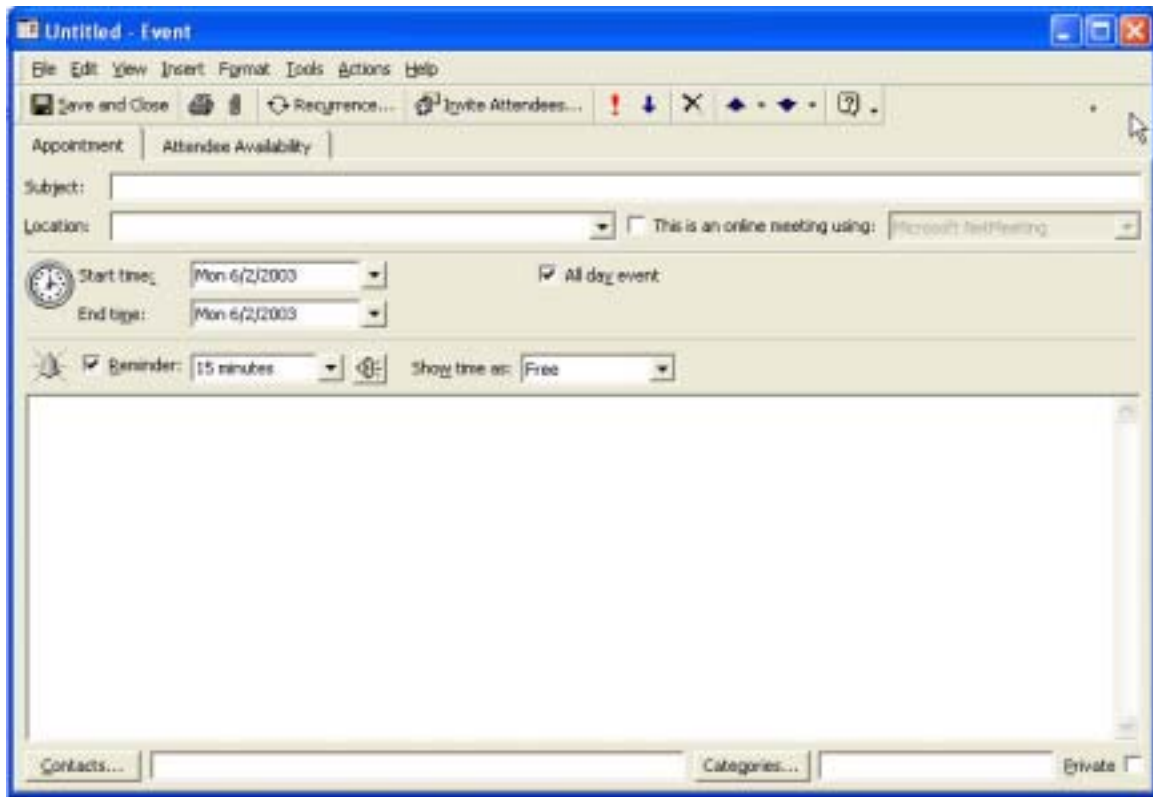


Figure 9

4. Enter the meeting date, start and end times in the bottom section. In the *Subject* field, enter the subject of the meeting. In the *Location* field, type the location of the meeting.
5. If desired, type additional information about the meeting in the text section. Attachments can be added in this field.
6. Click on the *Attendee Availability* tab.
7. Click on the *Invite Others...* button. Select the names of individuals who should attend the meeting.
NOTE: Names can be put in the *Required* or *Optional* attendee boxes.
8. Click *OK* when finished.
9. On the *Attendee Availability* screen, the attendees are listed on the left and their availability is shown in colored lines on the right. In Figure 8, 'AnyUser1' is free to attend the meeting at 11:00, but 'AnyUser2' is busy (blue) from 10:00 to 10:30.
NOTE: This is the only information that others will see on your calendar.

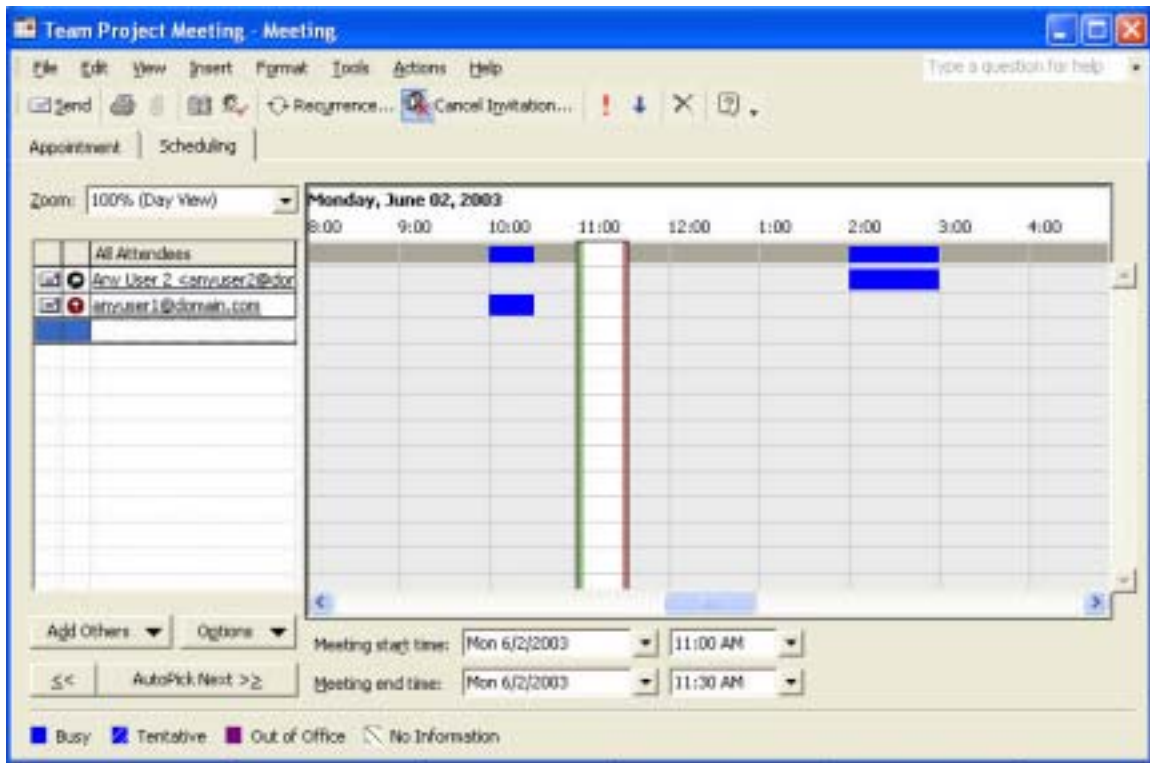


Figure 10

10. At this point, you can change the meeting date, start or end time depending on attendee availability.

NOTE: The AutoPick button to the left of the meeting times can be used to let Outlook select the next available time that all of the attendees have a free slot with enough time to schedule your meeting.

11. After completing the meeting request, click the *Send* button.

12. The meeting request is then e-mailed to all invited attendees. Invited attendees have the option of Accepting, Declining, or Tentatively Accepting the meeting invitation.

Receiving and Responding to a Meeting Request

Meeting requests are e-mailed to you from the requester. To reply to the meeting request:

1. Click the *Reply* button
2. Enter your response to the individual. You can choose to either Accept, Decline, or Tentatively Accept the meeting invitation.
3. Check the *Send the Response Now* option and click *OK*.

Meetings that are accepted are automatically entered onto an attendee's calendar.

Booking Resources

Outlook can be used for booking all kinds of resources, such as meeting rooms, projectors or whatever resources needs to be shared in your organization.

Simply create a new shared calendar folder under Public Folders and name it as the resource (i.e. Boardroom). In this calendar, you can view the resource's availability and reserve the resource for meetings or other events, thereby eliminating overlapping appointments. You can also "invite" this resource when creating a Meeting Request and the meeting will be entered into the resource's calendar.

NOTE: Someone must "own" the resource calendar in order to accept meeting requests; otherwise, the meeting will not be entered into the resource's calendar. The better alternative is to make the meeting request from the resource's calendar. This will automatically have the booking appear in the calendar of the resource.

Viewing Someone Else's Folders

In order to view someone else's folder that they have shared to you (i.e. calendar), the person must give you at least read-only permission. After they have given you permission, you will be able to see the folder and its contents. The folder will appear under Public Folders under the username of the person sharing the folder to you (Figure 9).

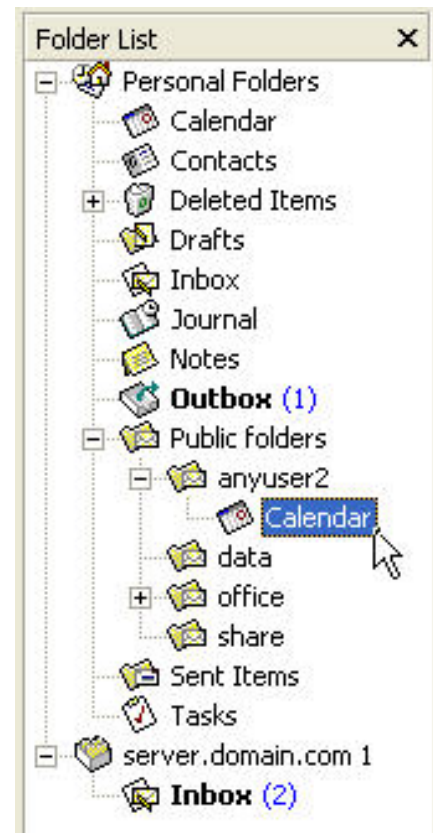


Figure 11

Giving Someone Else Access to Your Folders

To give someone permission to access your calendar in Outlook:

- a. Right-click on the folder you wish to share in your Folder List.
- b. Select the *Properties* option from the pop-up menu that will appear.
- c. When the *Properties* dialogue appears, select the *ExchangeIt! Permissions* tab. (You will now see the screen in Figure 10. This screen will show you the list of users and teams who are already authorized to access your calendar and their level of Permission).

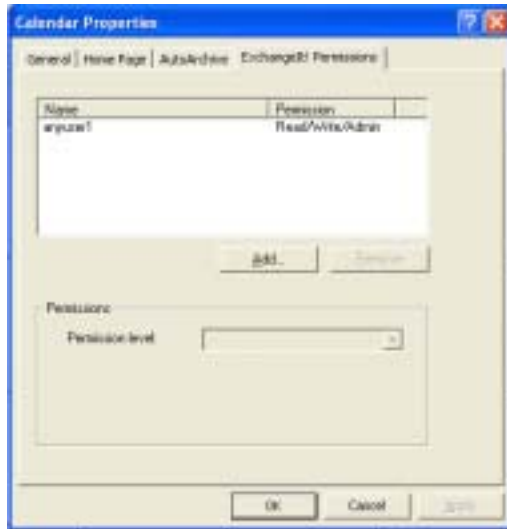


Figure 12

- d. Click on the *Add* button. This will bring up the list of users and teams on your *ExchangeIt!* server (Figure 11).



Figure 13

- e. Select the user or team to whom you wish to give access this folder from the *Choose user* drop-down menu and click *OK*. You will be brought back to the screen shown in Figure 10.
- f. Click on the user or team that you've just added (make sure that the user or team is highlighted) and then assign them a *Permission level* from the *Permission level* drop-down list.
- g. Click *Apply*.
- h. Click *OK*.

To modify a user's permissions:

1. Right-click on the folder.
2. Select the *Properties* option from the pop-up menu that will appear.
3. When the *Properties* dialogue appears, select the *ExchangeIt! Permissions* tab. (You will now see the screen in Figure 10. This screen will show you the list of people who are already authorized to access your calendar and their level of permission).
4. Select the user or team that you want to change Permission level (make sure that the user or team is highlighted) and then assign them their new Permission level from the *Permission level* drop-down list. (Figure 12).

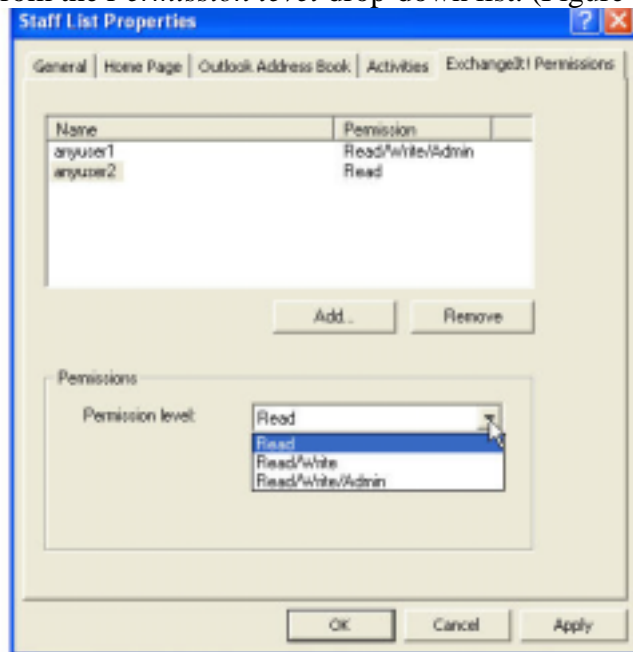


Figure 14

5. Click *Apply*.
6. Click *OK*.

To delete a user's permissions:

1. Right-click on the *Calendar* folder in your Folder List.
2. Select the *Properties* option from the pop-up menu that will appear.
3. When the *Properties* dialogue appears, select the *ExchangeIt! Permissions* tab. (You will now see the screen in Figure 10. This screen will show you the list of users and teams who are already authorized to access your calendar and their level of permission).
4. Select the user or team that you want to delete (make sure that the user or team name is highlighted).
5. Click on the *Remove* button.
6. Click *Apply*.
7. Click *OK*.

EXCHANGEIT! UNBOUND

This section of the guide is intended to give users and administrators additional insight into how *ExchangeIt!* and the Outlook plug-in work to allow for your items to be synchronized.

The Outlook plug-in client is required in order for Outlook to synchronize folders properly with the *ExchangeIt!* server. The plug-in enhances Outlook's native capabilities by communicating with the *ExchangeIt!* server to send and receive data corresponding to the folders and their contents based upon Access Control Lists (ACL). The ACL is used between the Outlook plug-in and the *ExchangeIt!* server to properly share the folders and their contents to other users.

It is probably best to understand the behaviour of the plug-in and how it interacts with Outlook to accomplish these tasks to allow you to best take advantage of *ExchangeIt!*'s capabilities.

Understanding the installation process

Installation of the plug-in is a straightforward process. However, it is recommended that the plug-in be installed using an administrative account because many workstations are deployed such that regular users are restricted from installing / uninstalling software.

To allow for multiple users to work on the same workstation, the plug-in creates separate profiles for each user based upon their Windows login. Once the plug-in installation has occurred, each time a new user logs onto Windows and opens Outlook (but has not previously configured the *ExchangeIt!* client) they will be asked to configure the client.

All the settings that are entered during this first time login may be later modified by selecting the *Tools* Menu of Outlook, then selecting *Options*. This will pop up a dialog box that has an *ExchangeIt!* tab. Selecting this tab will show the user the *ExchangeIt!* settings and allow the user to modify them.

There are 5 settings fields:

- a. Message Store
- b. Server
- c. User name
- d. Password
- e. Enable ExchangeIt! periodic synchronization (only appears if selected from the Outlook Tools -> ExchangeIt! dialog box)

Message Store

Outlook is capable of using multiple message stores. For most users, they will only have one open and available. The default Outlook message store is called “Personal Folders.” Some of the more advanced Outlook users may have multiple message stores. This field allows them to select the message stores that the *ExchangeIt!* plug-in is able to detect in Outlook based upon availability of folders that it can share such as Calendar and Tasks. For almost all users, selecting Personal Folders is best. Please refer to Microsoft Outlook’s documentation for further information on the use and setup of message stores.

The selection of the message store tells the plug-in that this is the message store for which the user will be synchronizing to the *ExchangeIt!* server.

Server

This field selects the *ExchangeIt!* server for which you wish to communicate with for synchronization. The default name is “calendar.” This is a private DNS entry set by the Net Integrator when *ExchangeIt!* is enabled. In most installation cases, this default name will be sufficient. However, if the workstation is not receiving its DNS from the Net Integrator running *ExchangeIt!*, the server name will need to be modified to the name being resolved by the local DNS server. Using the *ExchangeIt!* server’s IP address will also work, but if the local IP address of the server is dynamic, it may pose problems later if the IP address changes.

User name and password

The user needs to enter their username and password. This needs to be a valid account on the Net Integrator hosting the *ExchangeIt!* server. Although it is possible to modify the username after the initial installation, it is highly recommend that you don’t attempt to do so. If you wish to switch usernames, it is best to go through an uninstall and reinstall process rather than simply switching usernames, as many folders will be obsolete and other folders will appear with confusing results to Outlook.

Enable *ExchangeIt!* period synchronization

By default the periodic synchronization is enabled. Disabling this option will prevent the plug-in from communicating with the *ExchangeIt!* server. For the times that you may wish to disable the synchronization (i.e. working off-line), disabling this option will stop messages that may appear warning you that it is unable to communicate with the *ExchangeIt!* server.

Additionally, you will want to have this option disabled for users that you don’t wish to use *ExchangeIt!*. Disabling this option will prevent the plug-in from requesting the user information each time the user opens Outlook (if they aren’t utilizing *ExchangeIt!*), since clicking cancel at the request only disables the *ExchangeIt!* plug-in during that particular Outlook session.

Access Control List and Permissions (ACL)

The *ExchangeIt!* server provides access to items based upon permissions set on a folder-by-folder basis. In other words, the permissions of all items contained within a folder are based upon the permissions set on the folder itself.

The following describes the 3 permission levels and what they imply to the end-user with respect to the items within the folder and the folder itself.

Read-Only permissions

Items within the folder:

Users that have been granted read-only permissions to a folder are only allowed to view items in the folder. They do not have the ability to synchronize any modifications of items to the server. This means that the user can attempt to add, delete or edit the items, but all the modifications will be lost when the folder resynchronizes with the server, as the server will deny all changes forcing the plug-in to delete any additions, or edits, and retrieve the original (including items that were deleted).

The Folder:

Users that have been granted read-only permissions to a folder do not have the ability to synchronize the deletion of the folder or the creation of sub-folders. If the user attempts to delete the folder, the plug-in will retrieve the folder from the server during subsequent synchronizations. Any sub-folders that the user attempted to create will be deleted. Users are able to view the permissions set for the folder but will not be able to modify the ACL for that folder.

Read/Write permissions

Items within the folder:

Users that have been granted read/write permissions have the ability to read, add, delete and edit items within the folder. Any modification of the items within the folder will be synchronized with the server and then propagated to all other users that have permissions to the folder.

The folder:

Identical to the read-only permission level, users that have been granted read/write permissions to a folder do not have the ability to synchronize the deletion of the folder or the creation of sub-folders. If the user attempts to delete the folder, the plug-in will retrieve the folder from the server during subsequent synchronizations. Any sub-folders that the user attempted to create will be deleted. Users are able to view the permissions set for the folder but will not be able to modify the ACL for that folder.

Read/Write/Admin permissions

Items within the folder:

Users that have been granted read/write/admin permissions have the same capabilities as those with read/write permissions.

The folder:

Users that have been granted read/write/admin privileges have the ability to create and delete any sub-folders (unless they don't have read/write/admin privileges of the sub-folder they are attempting to delete), and the folder itself (only if they also have read/write/admin permissions to the parent folder). In addition to the ability to view ACL information for the folder, the user has the ability to make modifications to the ACL.

NOTE: Viewing of items marked "Private" requires Read/Write/Admin permissions.

If a user has administrative privileges on the Net Integrator itself, he/she will have read/write/admin permissions to all *ExchangeIt!* folders, whether or not they have been shared to that user.

Synchronization

The *ExchangeIt!* server and the Outlook plug-in work together to synchronize data between Outlook and the server. Unlike some other groupware/collaboration tools, the data is not accessed directly from the server. Instead, when the user edits, creates, deletes, or any way modifies the folders or folder contents, they are working with the data that is locally resident. This implies that at all times, there are at least two copies of the item (one locally, one on the server, and possible one or more to copies in other users' Outlooks) unless the item has not been synchronized yet. Using this approach has several benefits: The server has a copy that can now be automatically backed up by the Net Integrator; users are able to see and modify items off-line.

Because of the design, there are several important things to realize and keep in mind.

- a. Sharing of data is a two step process –
 - 1) Modifications to the folders and their contents first need to be synchronized between the server and the user that made the modification.
 - 2) The modification is synchronized between the server and the other users to whom the folder is shared with.
- b. Because the folder(s) and its contents are actually locally resident in Outlook and the server, modifications, copying and moving items is actually a "deletion" of the previous item(s) / folder(s), then the "creation" of the new item(s) / folder(s).
- c. If a user's permissions to see a folder is removed, this is treated as a delete by Outlook plug-in.

User Licenses

All licenses for *ExchangeIt!* are controlled on the *ExchangeIt!* server itself. Licenses are allocated per user. Each user that is licensed is allowed access the *ExchangeIt!* server from up to three simultaneous IP addresses. The IP addresses are tracked, aged, and

obsoleted automatically by the server. This allows each user the capability to simultaneously log in from different workstations, or to migrate from workstation to workstation. Thus remote users have the ability to work remotely on their laptop, yet still access the *ExchangeIt!* features when they use a desktop at the office.

The licenses can be assigned in two different ways. Users can be assigned a static *ExchangeIt!* license or have their license drawn from a pool of available dynamic licenses.

When users are assigned a license statically, their usernames will automatically appear in the ACL. Additionally, their license will not be redistributed to another user. Static license assignment and re-assignment must be done by the Net Integrator administrator using the Web Configuration.

If the user is to use a dynamic license, the user will only appear in the ACL after having recently connected to the *ExchangeIt!* server. Thus, if you have more users than you have licenses, it is still possible to utilize *ExchangeIt!*, but you must manually track who's accessing *ExchangeIt!*, otherwise, users may at some point not be able to access and synchronize anymore because not enough licenses are available.

It is recommended that the licenses be allocated statically as this will avoid confusion should there be more users than there are licenses available, and it will also avoid confusion in the ACL when user names don't appear and disappear.

Sharing of your Personal Folders

All folders originating from a user's message store will automatically be shared and synchronized to the server with read/write/admin privileges to the user themselves. This allows for the user to migrate to different workstations and have full access to their Personal Folder contents (except mail). If the user wishes to share the contents to other users, they must explicitly do so by modifying the ACL (by right-clicking on the folder and selecting the *ExchangeIt!* tab). Remember that ALL of the folder's contents are shared (except mail), so make sure there aren't items in there you do not wish to share prior to setting the ACL.

It is possible to create sub-folders and share the sub-folders without sharing the contents of the parent folder. For example, it is possible to create a sub-folder within "Contacts" called "shared." In addition to having contacts within the parent "Contacts" folder, you can have contacts also in the "shared" folder. You can choose to share the "shared" folder and not share the contents of the "Contacts" folder. Other users will see that "shared" has a parent folder called "Contacts," but they will not have the ability to look at the ACL or see the contacts contained within it.

Team Folders

Team and Public Folders

With the integration of *ExchangeIt!* into the core of the Net Integrator, users are able to take advantage of Net Integrator's team accounts.

Team folders work like any other folder – the only difference is that the team members are automatically granted full read/write/admin privileges to the team folders. Using team folders is one way for team members to work collaboratively by creating sub-folders containing tasks, notes, or any of the other shareable content without having to have someone designated as “hosting” the team's data. The team folders will be synchronized to each of the team members utilizing *ExchangeIt!*.

It is also possible to create sub-folders for a team that you can share to other users or teams. This is useful for allowing other teams or users access to certain contents without allowing them access to everything. For example, you can create a team on the Net Integrator called “facilities” with only a few members on that team. Create a calendar sub-folder called “facilities” called “main boardroom” with read-only permissions granted to everyone. This allows you to have members of the team “facilities” administer the bookings for the “main boardroom.” Thus everybody will have the ability to see when the “main boardroom” is in use, while only members of “facilities” will be able to modify.” Of course this is just one specific example, you can setup the permissions and teams in a multitude of ways to handle proper administration and access to company resources.

Teams and the ACL

The concept of teams can also help to facilitate sharing of folders and the setting of permissions. In the ACL, all teams will appear. You can set the ACL permissions any combination of users and teams. Setting the permission level for a team implies that everyone that is a member of that team is granted that permission level. If a particular folder is shared to users and/or multiple teams, the recipient user gains the highest permission level combination.

For example – if there is a team with everyone in the company called “everyone,” and another team called “finance,” you can choose to share your contacts at read-only permission level to “everyone” AND share it with read/write privileges to “finance.” So even though members of the “finance” are also members of “everyone,” they will have read/write permissions while everybody else has read-only permissions.

Public Folders

If a user has folders that they have shared to them – a new parent folder will appear called “Public Folders.” Beneath this “Public Folders” will appear with one or more sub-folders listed by the source. The source name is either the Team name or the username of the user from whom the folder is being shared.

Creating folders directly under Public Folders

The only way to create folders directly beneath “Public Folders” is:

- a. another user shares one or more of their personal folder(s) with you
- b. being a member of a team
- c. another team has shared one or more folders with you

Although it may appear that users are able to create folders that are directly parented by “Public Folders,” this is in fact not possible. When the plug-in resynchronizes with the ExchangeIt! server, all “created” folders and any content will be removed (read deleted) by the plug-in.

Deleting folders directly under Public Folders

Your ability to delete folders is dictated by the permissions you have been granted by the ACL. Because no one has permissions at the “Public Folders” level (by design), you will not be able to completely remove folders directly parented by “Public Folders”.

Remember that to delete the folder itself you need to have read/write/admin privileges to the folder as well as to the parent.

If the user deletes a folder for which they have read-only permissions, the folder and all of its contents will be restored when the user is resynchronized.

If the user deletes a folder for which they have read/write permissions, the folder will be restored, but all the contents will be deleted when the user is resynchronized.

If the user deletes a folder for which they have read/write/admin permissions, the folder will be restored, but all the contents as well as any sub-folders for which they have read/write/admin privileges will be deleted.

Notice that these permission levels will be obeyed by all subfolders as well. Thus a deletion will force a deletion of all contents and sub-folders to maximum extent possible given the permissions of the user deleting.

Uninstalling

Exiting Outlook and then running the uninstall from the “Add/Remove programs” of Windows will uninstall the *ExchangeIt!* plug-in.

Because of the design of *ExchangeIt!* to work locally with Outlook, all the Public Folders that have been shared with the user will still be present in Outlook. The user will need to open Outlook and manually delete the Public Folders to get rid of all the content.

For a “clean” re-install of the plug-in, the following steps should be taken:

- 1) Exit Outlook
- 2) Uninstall the plug-in
- 3) Open Outlook and delete “Public Folders”
- 4) Exit Outlook
- 5) Re-install the plug-in

Calendars, Free/Busy, and Meeting Requests

Outlook is mostly capable of using standard formats for the updating and requesting of other Outlook users' free/busy information and booking of meetings. This allows people to book meetings with other users (or resources), and instantly see when people (or resources) are available.

ExchangeIt! extends this capability by providing a locally hosted free/busy server. Without the locally hosted free/busy server, users wishing to utilize this feature would have to send their information to one of the Internet hosted servers. Using an Internet hosted server can bring a host of potential problems.

The plug-in utilizes Outlook's native capability to talk to a free/busy server by automatically filling in the appropriate address tag in the Free/Busy options during installation.

ExchangeIt! and the Outlook plug-in utilize standard protocol and standard formats for the transport of data and communications between Outlook and the *ExchangeIt!* server. Because of these standard implementations, there are a few things that the system administrator and the users need to know and understand.

Most of the functionality utilized is native to Outlook. Unfortunately, Outlook doesn't handle some of the standards very well.

Meeting Requests

In particular, Outlook has problems with the receiving of meeting requests from Internet standard "iCalendar" meeting requests. Note that these are issues with Microsoft Outlook and not due to the installation of the *ExchangeIt!* plugin. The presence of the plug-in does not alter this behaviour. These are some known issues with Outlook (see references below for more information).

The work-arounds that we recommend for the sending of meeting requests (so they can be received properly) are as follows:

A) If everybody is using Windows and Microsoft Outlook:

- 1) From Outlook's Tools Menu: Preferences Tab-> Calendar Options
Disable the "when sending meeting requests over the Internet, use the icalendar format.
- 2) From Outlook's Tools Menu: Mail Format Tab
"Compose in this message format:" should be selected to "Rich Text"
- 3) From Outlook's Tools Menu: Mail Format Tab -> Internet Format
"When sending Outlook Rich Text messages to Internet recipients, use this format:" should be selected to "Send using Outlook Rich Text format"

B) If there is a mixture of Outlook 2000 and Outlook 2002 and other clients, there will be some incompatibilities. To reduce these incompatibilities we suggest the following when you are creating the meeting request:

- 1) Do not enable the “reminder”.
- 2)
 - i) In the “To” box, type the recipient’s e-mail address, and then double-click the e-mail address.
 - ii) In the E-mail Properties dialog box, in the Internet format box, change the option from “Let Outlook decide the best sending format” to “Send Plain Text only.”

<http://support.microsoft.com/default.aspx?scid=kb;en-us;218376>

<http://support.microsoft.com/default.aspx?scid=kb;en-us;284392>

<http://support.microsoft.com/default.aspx?scid=kb;en-us;307313>