Optimal Performance and Installation Guide

This guide provides information on how to get the optimal performance from Outlook Connector, how to install Outlook Connector on the MDaemon server, and how to install the Outlook Connector client on the client machine.

Optimal Performance

Deployment Considerations

The list below represents issues which should be considered prior to deployment. It should not be taken as definitive or complete, and we always recommend testing the products in your own environment to ensure compatibility and that features work as required prior to purchase.

- Outlook Connector requires Windows XP or newer and Outlook 2003 or newer to function.
- Users with large mailboxes may experience reduced performance using Outlook Connector in comparison to using an IMAP or POP3 account. This is most noticeable when opening Outlook, when large folders are accessed for the first time, when using Outlook 2003's **Search** folders, or when accessing the **Journal** folder.
- Compatibility with third party Outlook plug-ins and PDA synchronization software cannot be guaranteed. Outlook Connector does not make use of PST files. Compatibility with any software which requires PST files should be checked prior to purchase. In some cases, adding an empty PST file to the Outlook Connector profile may help.
- In Outlook 2007, custom category names/colors may not be retained after Outlook is restarted.
- S/MIME encoded (digitally signed) emails are not currently supported in Outlook Connector.
- Outlook's search folders will only reflect changes to items if Outlook has been re-started.
- Outlook custom forms and custom template files (.OFT) are not currently supported by Outlook Connector.
- The **Activities** tab for **Contacts** may not work or may cause Outlook to hang (on very large profiles).
- Roaming users should relocate their Outlook Connector cache files (LocalCache.db) on a network share so that the data does not roam with their profile.
- In Outlook 2003, when scheduling meetings, users need to select **Tools | Check Names** for the **free / busy** information to update.

General Use Recommendations

- We recommend using the latest version of Outlook Connector on both the MDaemon server and the latest Outlook Connector plug-in on the client.
- We recommend using Outlook Connector with MDaemon 14 and above.
- We recommend disabling all Outlook plug-ins except the Outlook Connector plug-in.
- Regular defragmentation of the MDaemon server's hard disk is recommended. Server performance can be further improved by reducing the amount of logging MDaemon is doing (**Setup | Server Settings | Logging | Settings**) along with moving the **Logs** folder and **User, Public and Queues** folders to a physically separate disk.
- We recommend periodically purging and compacting the Outlook Connector database file.
- The local Outlook Connector cache file should be excluded from realtime scanning by third party desktop antivirus applications. By default, the local Outlook Connector cache is located at **C:\Documents and Settings\-username-\Application Data\Alt-N\Outlook Connector 4.x\ProfileName\account-name\User'sEmail@YourCompany.com**

- Outlook should only be configured to use HTML or Plain Text format for sending emails. Depending on the version of Outlook you are using, these settings can usually be found via **Tools | Options | Mail Format** tab. Outlook should not be configured to use Word as its email editor or to use Rich Text Format (RTF). Both of these methods result in emails which do not adhere to Internet standards.
- We recommend configuring Outlook Connector's **Send/Receive** tab (located under the **Account** button in the Outlook Connector toolbar) to only check the Inbox folder for new items at each Outlook **send/receive** interval.
- We recommend configuring the **Send/Receive** schedule to check for new mail every 3 minutes.

Note: *If you are planning to import data from a PST file, make sure to run scanpst.exe on the file first and compact the folders to help prevent corrupted messages from being imported into the Outlook Connector profile. Scanpst is located under* ***C:\Program Files\Common Files\System\MSMAPI\1033*** *and comes with Outlook. Note that multiple passes with Scanpst may be needed.*

Note: *Remove invalid characters (~ # % & * { } / \ : < > ? | ") from Outlook folder names prior to importing.*

Install Outlook Connector On the MDaemon Server

Step 1 - Install Outlook Connector for MDaemon

1. Download the Outlook Connector for MDaemon installer from www.altn.com. Select **Downloads | Outlook Connector for MDaemon**. Click the **Download Now** button, and then click on the installer link next to your preferred language selection. The installer will now download. [Figure 2-1]
2. Double-click the Outlook Connector installer to begin the installation, then click **Next** on the Welcome screen.
3. Click on **I Agree** on the End User License Agreement screen.
4. Select your preferred installation type, and then click **Next**.
5. Select the first option to install a fully functional trial of Outlook Connector.
6. Select the second option if you have already purchased a license key for Outlook Connector.
7. Click **Next** on the **Trial Outlook Connector for 30 Days** screen.
8. On the Customer Information screen, enter your name, company, country, and other requested information. If installing a trial, be sure to enter a valid email address. Your trial key will be sent to this address, and must be entered before proceeding to the next step. Click **Next** to continue.[Figure 2-2]
9. If you would like MDaemon to send an email to your users containing a link to the Outlook Connector plug-in installer, then enter the URL to your WorldClient server in the blank provided (example: *http://mail.example.com:3000*). Click on **Next** to continue. [Figure 2-3]
10. On the Ready to Install screen, click **Next** to continue with the installation process.
11. Leave the box checked to start MDaemon with new Outlook Connector functionality, then click on **Finish**. At this time, MDaemon will automatically restart.

Figure 2-1

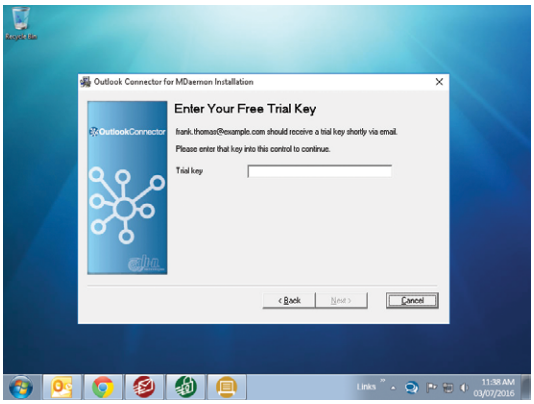

Figure 2-2

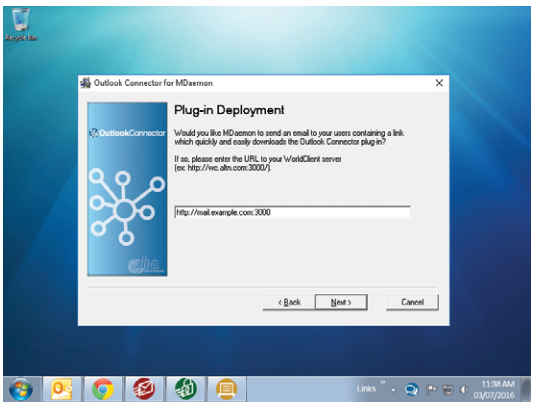

Figure 2-3

Step 2 - Enabling Outlook Connector Support in MDaemon

Note: *Activating Outlook Connector requires the enabling of IMAP folder sharing. MDaemon displays a dialog concerning this when you enable Outlook Connector if sharing is not already enabled.*

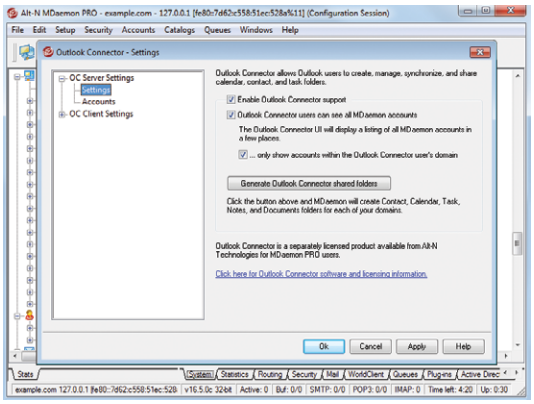

Figure 3-1

1. In MDaemon, go to **Setup | Outlook Connector**. Expand the drop-down **OC Server Settings** menu on the left and make sure **Settings** is selected.
2. Make sure **Enable Outlook Connector support** is checked. This box should be checked by default after installing Outlook Connector on the server. [Figure 3-1]
   - You can optionally check the two remaining checkboxes **Outlook Connector users can see all MDaemon accounts** and …**only show accounts within the Outlook Connector user's domain**.
3. Click on **Generate Outlook Connector shared folders** to create Contacts, Calendars, Journals, Tasks and Notes folders for all domains, then click **OK** on the **Folders created** confirmation window.
4. Click on **Accounts** under **OC Server Settings** in the left-hand navigation menu.
5. Select the accounts that will be authorized to use Outlook Connector in the drop-down menu, clicking **Add** after each one. If you would like to allow all MDaemon users to use Outlook Connector, then click the button **Allow all accounts to connect using Outlook Connector**. The above Outlook Connector Accounts window will populate with the authorized accounts that you have selected. [Figure 3-2]

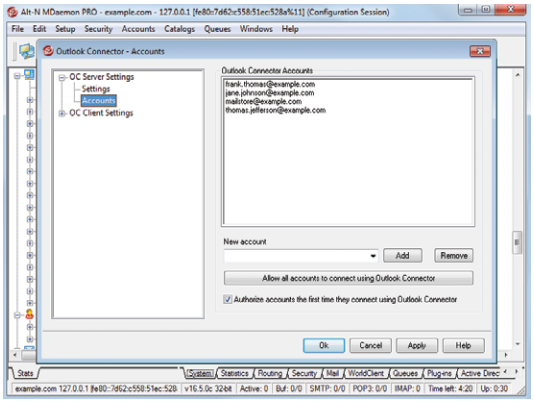

Figure 3-2

   - You can optionally check the box **Authorize accounts the first time they connect using Outlook Connector**.

     Note: *if you enable this option then you have in effect authorized all MDaemon accounts to use Outlook Connector for MDaemon. The accounts simply will not be added to the list until the first time each one connects using Outlook Connector.*

Pushing Outlook Connector Client Settings from MDaemon to Outlook Connector Users

Beginning with MDaemon 16.5 & Outlook Connector 4.0, administrators can push Outlook Connector client settings from MDaemon to Outlook Connector users. To enable Outlook Connector settings to be pushed to clients, follow these steps.

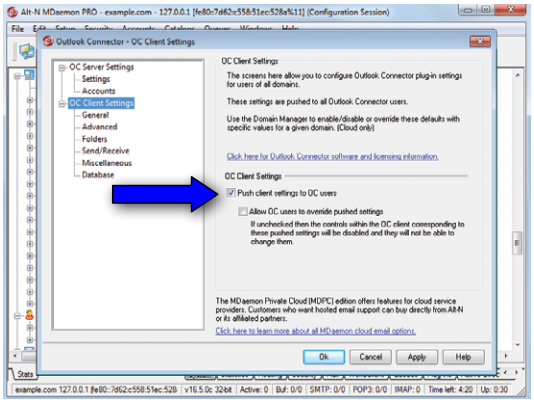

Figure 3-3

1. In MDaemon, go to **Setup | Outlook Connector**.
2. Click on **OC Client Settings** in the left-hand menu.
3. Check the box **Push client settings to OC users**. [Figure 3-3]
4. Click **Apply** and **OK**.

The following settings, located under the **OC Client Settings** drop-down menu, are pushed out to the client: [Figure 4-1]

- General
- Advanced
- Folders
- Send/Recieve
- Miscellaneous
- Database

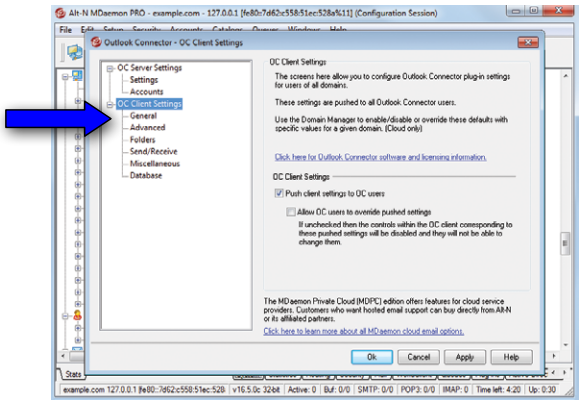

Figure 4-1

General [Figure 4-2]

Note*: Macros must be used in most of the fields described below. Click on the Macro Reference button for a list of all macros that can be used in these fields.*

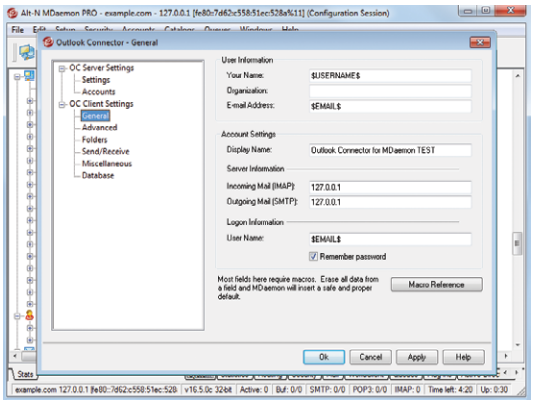

Figure 4-2

User Information

Your Name: By default this option uses the $USERNAME$ macro, which imports the user's first and last name from the Account Details screen of the account editor. This appears in the From header of the user's messages.

Organization: This is an optional space for your business or organization name.

E**-mail Address:** By default this option uses the $EMAIL$ macro, which inserts the user's email address. This appears in the From header of the user's messages.

Account Settings

Display Name: This name is displayed in Outlook so that the user can identify which account is currently in use. This is useful for users who have multiple accounts in their profile. Only the user sees this information. This is set to "Outlook Connector for MDaemon" by default.

Incoming Mail (IMAP): This is the server the Outlook Connector clients will access to collect and manage each user's email. This is set to $FQDN$ by default. The $FQDN$ macro will import the FQDN (fully-qualified domain name) from the **SMTP host name** field on the **Domain Manager | Host Name & IP** screen.

Outgoing Mail (SMTP): This is the server to which the Outlook Connector clients will connect to send your users' outgoing messages. Frequently this is the same as the Incoming Mail (IMAP) server above. This is set to $FQDN$ by default.

User Name: This is the user name needed to access and manage each user's MDaemon/Outlook Connector email account. This is typically the same as the E-mail Address above. By default this is set to $EMAIL$.

Remember password: By default Outlook Connector clients are set to save the user password, so that when Outlook is started it will automatically sign in to the email account without asking for credentials. Disable this option if you wish to require users to enter their password when starting Outlook.

Advanced [Figure 5-1]

Incoming Server (IMAP)

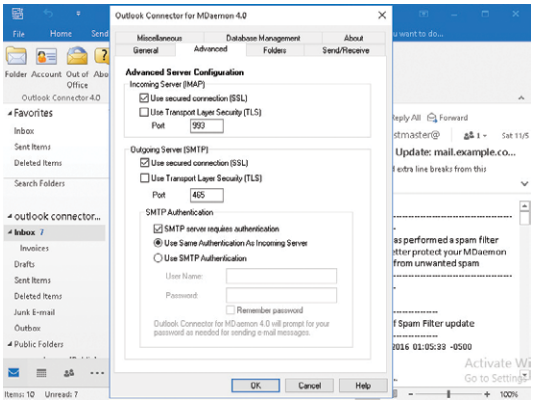

Figure 5-1

Use secured connection (SSL): Check this box if you want clients to use a secure SSL connection when connecting to the Incoming Mail (IMAP) server. Enabling this option will automatically change the Port setting to “993,” which is the default SSL port.

Use Transport Layer Security (TLS): Check this box if you want clients to use a secure TLS connection when connecting to the Incoming Mail (IMAP) server. Unlike SSL, which uses port 993 for IMAP, the connection is upgraded to a TLS connection over the default IMAP port (port 143).

Port: This is the port on which the Outlook Connector clients will connect to your Incoming Mail (IMAP) server. By default this is set to 143 for IMAP connections or 993 for SSL encrypted IMAP connections.

Outgoing Server (SMTP)

Use secured connection (SSL): Check this box if you want Outloook Connector clients to use a secure SSL connection when connecting to the Outgoing Mail (SMTP) server. Enabling this option will automatically change the Port setting to “465,” which is the default SSL port.

Use Transport Layer Security (TLS): Check this box if you want Outloook Connector clients to use a secure TLS connection when connecting to the Outgoing Mail (SMTP) server. Unlike SSL, which uses port 465 for SMTP, the connection is upgraded to a TLS connection over the default SMTP port (port 25).

Port: This is the port on which the Outlook Connector clients will connect to your Outgoing Mail (SMTP) server. By default this is set to 25 for SMTP connections or 465 for SSL encrypted SMTP connections.

SMTP Authentication

SMTP server requires authentication: By default users must use valid login credentials to authenticate themselves when connecting to the Outgoing Server (SMTP) to send an email message.

Use same authentication as incoming server: By default Outlook Connector clients will authenticate themselves using the same login credentials for the Outgoing Mail (SMTP) server that they use for the Incoming Mail (IMAP) server.

Use SMTP authentication: Use this option if you wish to require your Outlook Connector users to use different authentication credentials when sending messages. This may be necessary when using a different email server for outgoing mail.

User name: Enter the user name that you wish to use for SMTP authentication. In most cases, your user name would be your full email address.

You can optionally check the **Remember password** box.

Folders [Figure 6-1]

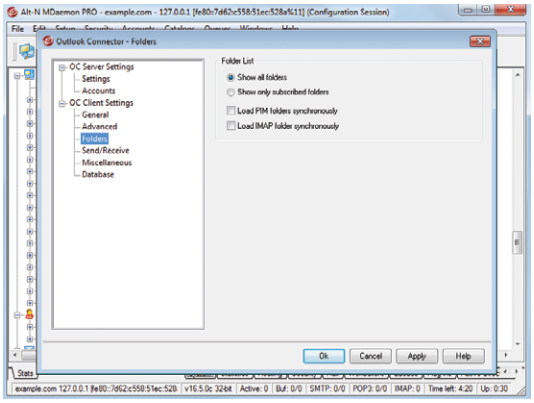

Figure 6-1

Show all folders: By default the folder list in Outlook will display all of the folders to which the Outlook Connector user has access on the mail server.

Show only subscribed folders: Select this option if you want the Outlook folder list to display only those folders to which the user has subscribed.

Load PIM folders synchronously: In most cases this option should be left unchecked, which means that an Outlook Connector user can continue to use Outlook while Outlook Connector loads the contents of PIM folders (i.e. non-mail folders, such as: Contacts, Calendars, and Tasks). If you check this box then Outlook will effectively be blocked from use until all of the data has been loaded. Ordinarily this option may only be needed when the user has 3rd party applications attempting to access PIM folder contents.

Load IMAP folders synchronously: In most cases this option should be left unchecked, which means that an Outlook Connector user can continue to use Outlook while Outlook Connector loads the contents of the user's IMAP mail folders. If you check this box then Outlook will effectively be blocked from use until all of the data has been loaded. Ordinarily this option may only be needed when the user has 3rd party applications attempting to access mail folder contents.

Send/Receive [Figure 6-2]

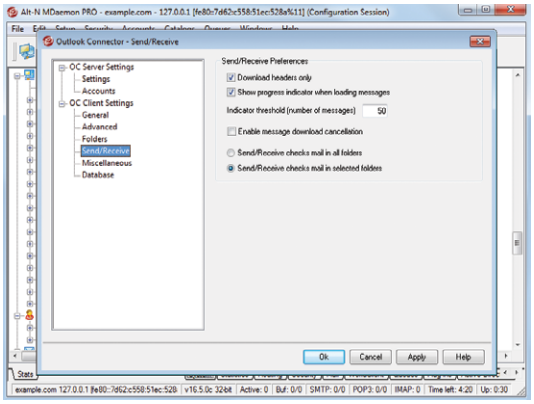

Figure 6-2

Download headers only: By default when Outlook Connector does a Send/Receive and finds new messages, it will only download the message headers (i.e. To, From, Subject, and the like) for display in the message list. The full message isn't downloaded until it is viewed.

Show progress indicator when loading messages: Outlook Connector displays a progress indicator when downloading a large number of messages. Clear this checkbox if you do not wish to display the progress indicator.

Indicator threshold (number of messages): When the above option is enabled, the Progress Indicator is displayed when downloading this number of messages or more.

Enable message download cancellation: Check this box if you want your Outlook Connector users to be able to cancel the download while Outlook Connector is downloading a large message.

Send/Receive checks mail in all folders: Select this option if you want Outlook Connector to check every mail folder for new messages when it performs a Send/Receive action for the user's account.

Send/Receive checks mail in selected folders: Select this option if you want Outlook Connector to check the user's specified folders for new messages when performing a Send/Receive action on the account.

Note: *For best performance, we recommend configuring Send/Receive to check for new mail in the Inbox only, as explained in the General Use Recommendations section above.*

Miscellaneous [Figure 7-1]

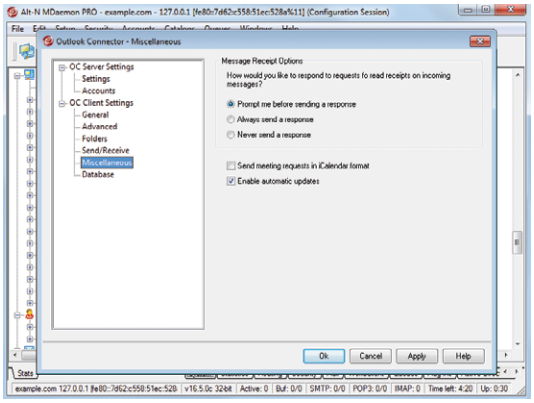

Figure 7-1

How would you like to respond to requests for read receipts on incoming messages? Sometimes incoming messages contain a special header for requesting that an automated message be sent back to the sender to let him or her know when you read the message. Set this option to specify how you want Outlook Connector to handle messages that ask for read confirmations.

Prompt me before sending a response: Choose this option if you want users to be asked whether or not to send the read confirmation message whenever they open a message that requests it.

Always send a response: Select this option if you wish to send a read confirmation message automatically whenever a user opens a message that requests it.

Never send a response: Choose this option if you do not want Outlook Connector to respond to read confirmation requests.

Send meeting requests in iCalendar format: Check this box if you want Outlook Connector to send meeting requests in iCalendar (iCal) meeting format. We recommend checking this box.

Enable automatic updates: By default Outlook Connector will be updated automatically whenever a new version is available. We recommend leaving this box checked.

Database [Figure 7-2]

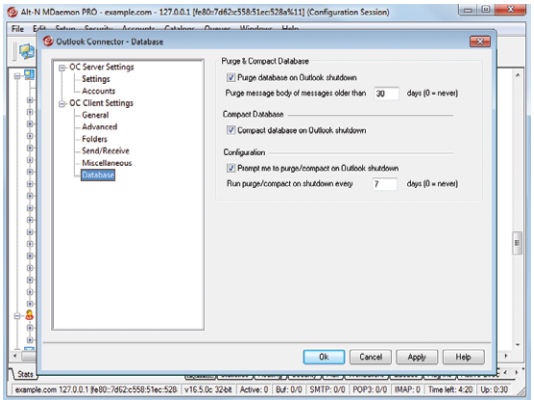

Figure 7-2

Purge database on Outlook shutdown: To conserve disk space and improve performance, by default Outlook Connector is set to purge/delete the message body of old messages when you shut down Outlook. This does not remove the message headers nor does it affect the original messages stored on the server; it simply removes the locally cached body of old messages. Whenever you open an old message that has been purged in the past, the message body will be downloaded again to your computer. Further, only email message bodies are purged; this doesn't affect Contacts, Calendars, Tasks, Journals, or Notes. Disable this option if you do not wish to purge the database at shutdown.

Purge message body of messages older than __ days: Use this option to designate how old a message must be for its message body to be purged at Outlook shutdown. By default a message must be more than 30 days old for it to be purged. Its age is based on the message "modified" date. Use "0" in this option if you never wish message bodies to be purged.

Compact database on Outlook shutdown: To conserve disk space and improve performance, by default Outlook Connector is set to compact and defragment the locally cached messages database file when the user shuts down Outlook. Outlook must shutdown cleanly, however, for the compact action to occur; if Outlook crashes or you use the Task Manager to "End Task" then the database will not be compacted. You can use the options in the Configuration section below to designate how often this will occur and whether or not you will be prompted before it does.

Database [continued] [Figure 8-1]

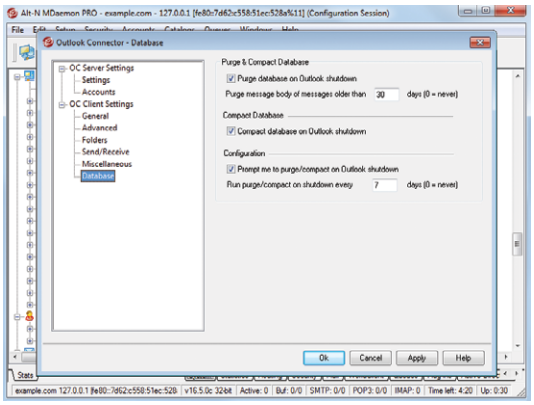
Figure 8-1

Prompt me to purge/compact on Outlook shutdown: Use this option if you want users to be prompted before Outlook Connector will purge or compact the database file at shutdown. If the user clicks Yes then it will perform the compact or purge actions, displaying a progress indicator as it does so. Clear this checkbox if you do not want users to be prompted; at shutdown Outlook Connector will begin purging or compacting the database automatically, displaying a progress indicator when doing so.

Run purge/compact on shutdown every __ days: This option controls how often Outlook Connector will purge or compact the database at shutdown. By default this option is set to 7 days, meaning that it will run the Purge/Compact process at shutdown once every seven days. Set this option to "0" if you wish to purge/compact the database every time a user shuts down Outlook.

Install Outlook Connector Plug-in on Client Machines

1. Once the Outlook Connector application has been installed on the MDaemon server, the Outlook Connector Client will need to be installed on each client machine. There are 2 ways to download the client:
   - **Method 1**: Download the Outlook Connector Client installer from www.altn.com. Select **Downloads | Outlook Connector for MDaemon**. Choose from **32 bit, 64 bit, or MSI Client Installer** by clicking the appropriate button, and then click **Save File**. [Figure 8-2]
   - **Method 2**: Log into WorldClient. Click on the **Options** menu, select **Outlook Connector** in the drop-down menu, then click on **Download Outlook Connector** and save the file to your desktop. [Figure 8-3]
2. Make sure that Outlook is shut down, and double-click the **OutlookPluginInstall.exe** file on your Windows desktop to begin the installation.
3. Select your preferred language in the drop-down menu, and then click **OK.**
4. Click **Next** on the Welcome screen.
5. Select the option **I accept the terms in the license agreement** on the License Agreement screen, and then click **Next**.
6. On the Ready to Install screen, click **Install** to continue with the installation process.
7. After all files have been installed, the Finish screen displays. Click **Finish** to complete the installation.

Figure 8-2

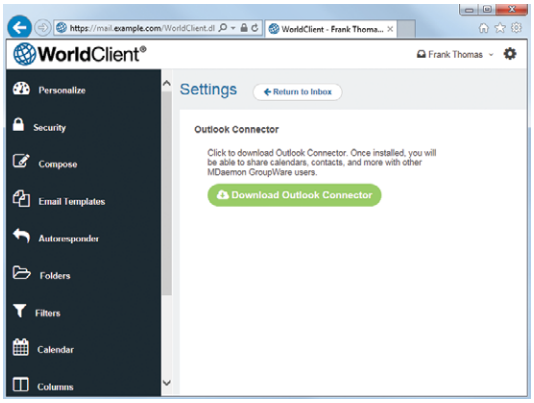

Figure 8-3

Configuring the Outlook Connector Client On Each Client Machine

Each user can follow these steps to configure the Outlook Connector client.

1. In Windows, navigate to the Windows control panel, click on **Mail**, click on **Show Profiles**..., then click the **Add...** button, and type in a profile name (Ex: Outlook Connector) and click **OK**. Select **Manually configure server settings** (Outlook 2016, 2013, 2010 and 2007) or **Add a new e-mail account** (Outlook 2003), then click on **Next**. [Figure 9-1]

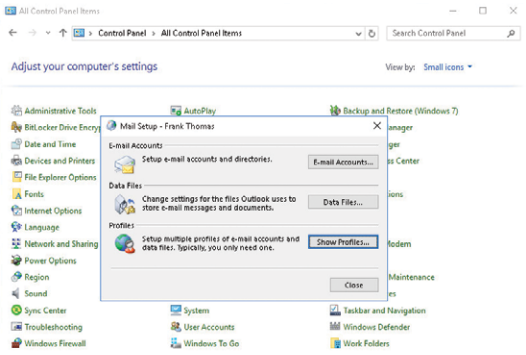

Figure 9-1

2. Select **Other**, then select the **Outlook Connector for MDaemon 4.x** server type, and then click on **Next**. [Figure 9-2]
3. Fill out the **Account Settings** and **User Information** sections. This information can be populated automatically or manually. Both methods are explained below. [Figure 9-3]

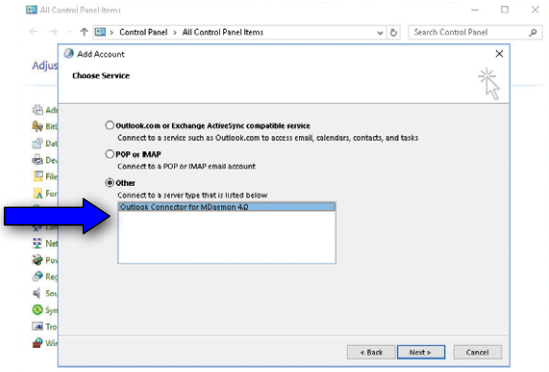

Figure 9-2

Method 1: Enter your email address in the **User Name** field, and then enter your password.

- Click on **Test & Get Account Settings** to query the server and automatically populate the account settings & user information.
  Note: *To use this method, the option **Push client settings to OC users** must enabled in MDaemon.*

Method 2: Enter your information manually.

- Enter your email address in the **User Name** field, and then enter your password.
- Enter your preferred display name in the **Display Name** field.
- In the **Incoming Mail (IMAP)** and **Outgoing Mail (SMTP)** fields, enter the IP address or host name of your MDaemon server.
- In the **User Information** section, enter your name, organization, and email address.

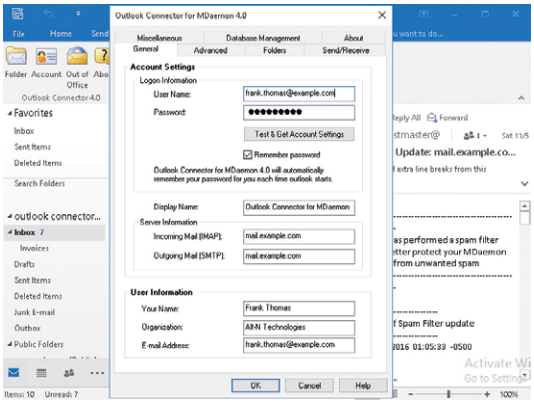

Figure 9-3

4. Enable SSL and/or TLS (optional):

Note: *SSL must be enabled in MDaemon first. The administrator can enable SSL & TLS support in MDaemon by navigating to Security | Security Settings | SSL & TLS | MDaemon & checking the box Enable SSL, STARTTLS, and STLS.*

- Click on the **Advanced** tab. Then check the boxes next to **Use secured connection (SSL)** under the incoming (IMAP) and outgoing (SMTP) server sections. You can optionally check **Use Transport Layer Security (TLS)** as well. [Figure 9-4]

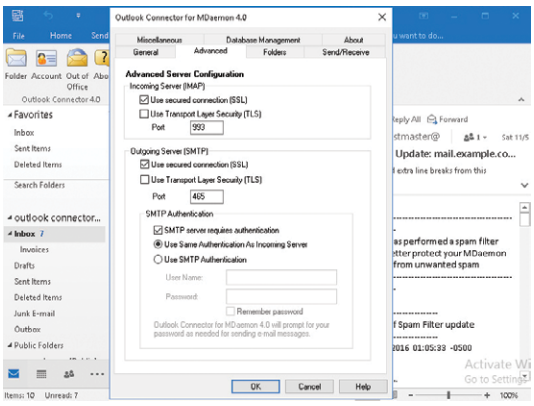

Figure 9-4

5. If SMTP authentication is required, then check the box **SMTP server requires authentication**. Then select either **Use Same Authentication as Incoming Server** or **Use SMTP Authentication** (if Use SMTP Authentication is selected, then enter the required username and password). [Figure 10-1]
6. Click on the **General** tab, then click on **Test & Get Account Settings**. If the response from the test is successful, click **OK**, otherwise:
   - If the test fails and you receive the error **Unable to connect to server**, verify the IP address or host name of your MDaemon server.
   - If the test fails and you receive the error **Authentication Failed**, verify that the User name and password are entered correctly.

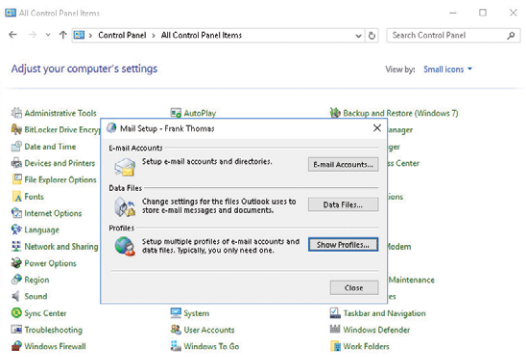

Figure 10-1

7. Back on the Mail Profile Manager screen, make sure that your new account is selected for **Always use this profile** and click **OK** to finish.