Using Outlook™ & InsightConnector™ with MDaemon 6.0
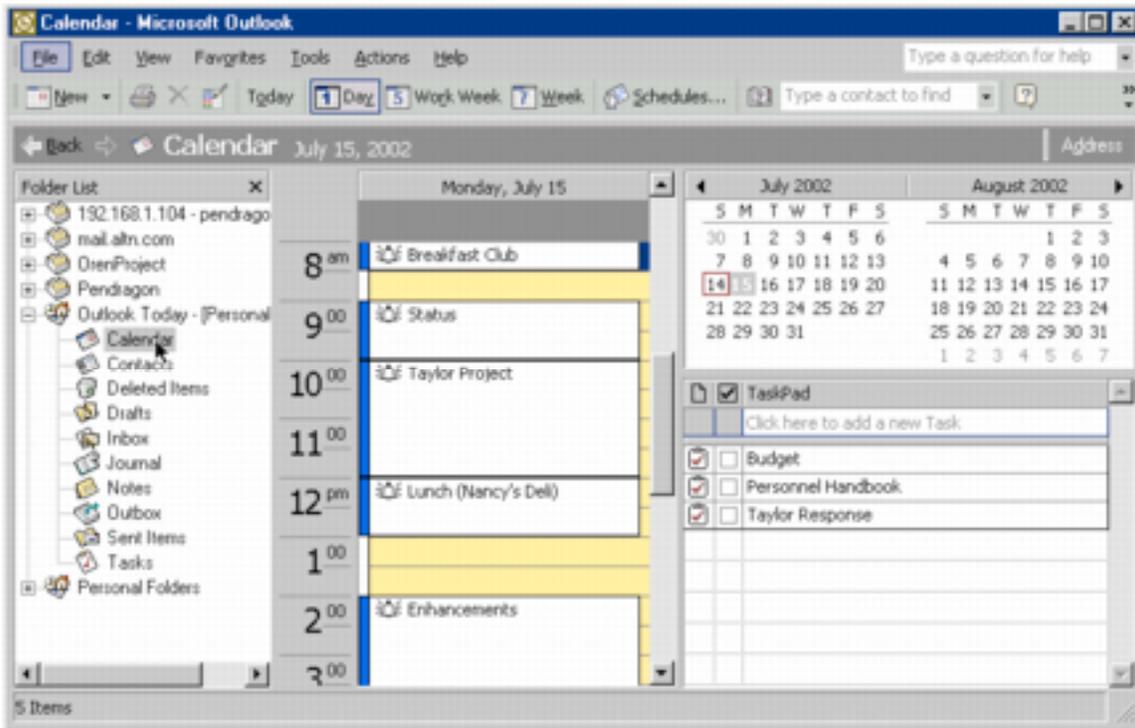
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Abstract

Microsoft Outlook is a much loved as well as greatly loathed personal information manger and communications tool. People love Outlook because it does just about everything they need to do to manage their time, contacts, documents and email. Loathing comes because many of its best features, such as sharing information, work fully only when coupled with Microsoft Exchange, the software publisher's email server. Exchange Server, some say, has a high cost to benefit ratio, especially for small to mid-sized business. To address this issue, Bynari, a company in Dallas, Texas, has developed software that releases the complete set of Outlook features, including all sharing, when coupled with MDaemon or other IMAP4 compliant email servers. The software, InsightConnector™, runs on individual workstations. It enables the sharing of Outlook folders, calendars and contacts plus all other Outlook "objects". It allows companies to use the complete features of Outlook with the economy of the MDaemon email server.

Important Note

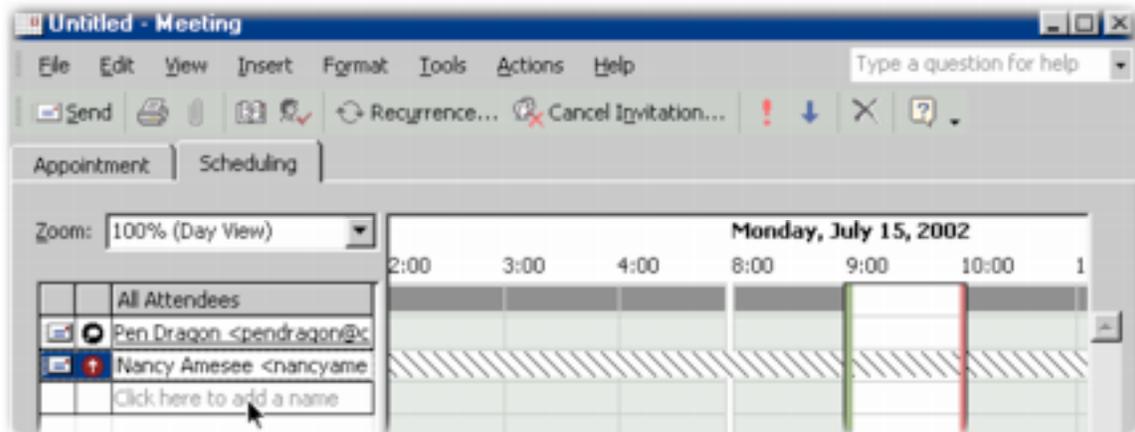This document describes one means of using Outlook in a shared environment without Exchange Server. The content is for information and discussion purposes only. It is not a complete evaluation and endorsement of InsightConnector™. Determining the suitability of this product for any specific application is the responsibility of the individuals or enterprises considering this option. The website for Bynari is http://www.bynari.com/

Outlook and Exchange Server Sharing

Outlook is a personal information management tool supplied with Microsoft Office. At its core, Outlook handles e-mail, calendars, contacts and tasks for individual users. It can also keep a journal of documents and actions related to contacts. When coupled with Microsoft Exchange Server, Outlook supports integrated sharing of information among members of one or multiple groups.

Users tend to praise the features of Outlook. Especially popular is its ability to schedule a meeting and notify participants, all in one user operation. In the hands of skilled users, Outlook can help improve the efficiency and quality of communicating, planning and scheduling.

On its downside, Outlook receives user comments about requiring too much processing power. Some also say Outlook operates poorly with non-Microsoft applications, randomly loses information and crashes several times a day. Yet, one of the most common annoyances appears to be its proprietary relationship to Microsoft Exchange Server when it comes to information sharing.

The sharing comments say Outlook and Exchange Server use proprietary methods for information interchange[1]. This hampers the swapping of calendar, contact and task information with individuals and enterprises using industry standard tools. It makes working together more expensive or more difficult or both.

While one obvious solution is switching everyone to the Microsoft server, some enterprises resist this because of the cost and complexity of licensing and operating Exchange Server. Individuals may like Outlook, but many enterprises prefer a more open and easier to administer server than Exchange. For many organizations and businesses a standards-based IMAP[2] server is an attractive option.

Because the Outlook client itself is so popular, some third-party companies have implemented "connectors" between Outlook and industry-standard IMAP email servers. These tools intergrate Outlook's email, calendar, contacts and tasks with the built-in sharing capablities of IMAP. One of these is InsightConnector.

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[1] In fairness to Microsoft, Outlook includes an export function for limited sharing between Outlook clients without using Exchange Server. This type of sharing, however, is complex to use and introduces content synchronization problems.

[2] Some versions of Outlook do have IMAP capabilities. These share only the IMAP email folders. They do not share the calendar, contacts, task and journal.

Sharing with InsightConnector™

As a plugin, InsightConnector enables Microsoft Outlook clients to share their proprietary calendars, contacts, tasks and other Outlook-specific items. It does this by connecting the data to industry-standard IMAP folders.

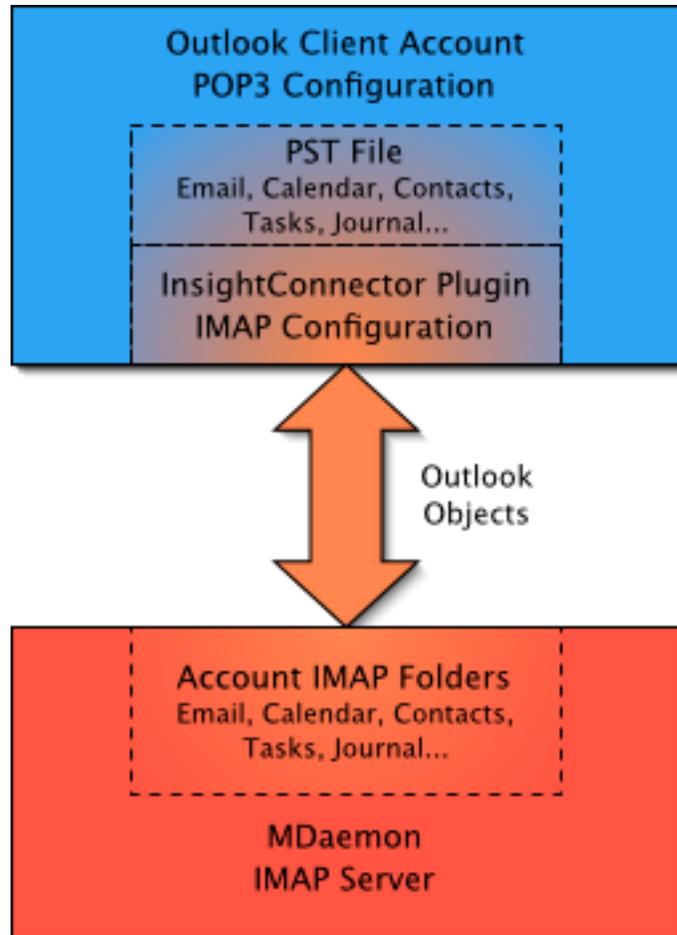The illustration shows the design concepts of the InsightConnector.

On the client machine, Outlook stores its information in a PST file, the normal storage format for Microsoft Outlook data.

When using Outlook with an IMAP server and the InsightConnector:

> The client account on Outlook is set up to use POP3, not IMAP.
>
> InsightConnector™ connects the client account with the IMAP server. All IMAP functionality resides in the plugin.

The plugin creates IMAP folders on the server and places the Outlook information into the folders. There is one folder for each type of information, such as email, calendar, contacts, tasks, journal and any folders the user creates. InsightConnector synchronizes the information in the folders with the content of the Outlook PST file, where all information resides.

Outlook Client Account POP3 Configuration

PST File
Email, Calendar, Contacts, Tasks, Journal...

InsightConnector Plugin
IMAP Configuration

Outlook Objects

Account IMAP Folders
Email, Calendar, Contacts, Tasks, Journal...

MDaemon IMAP Server

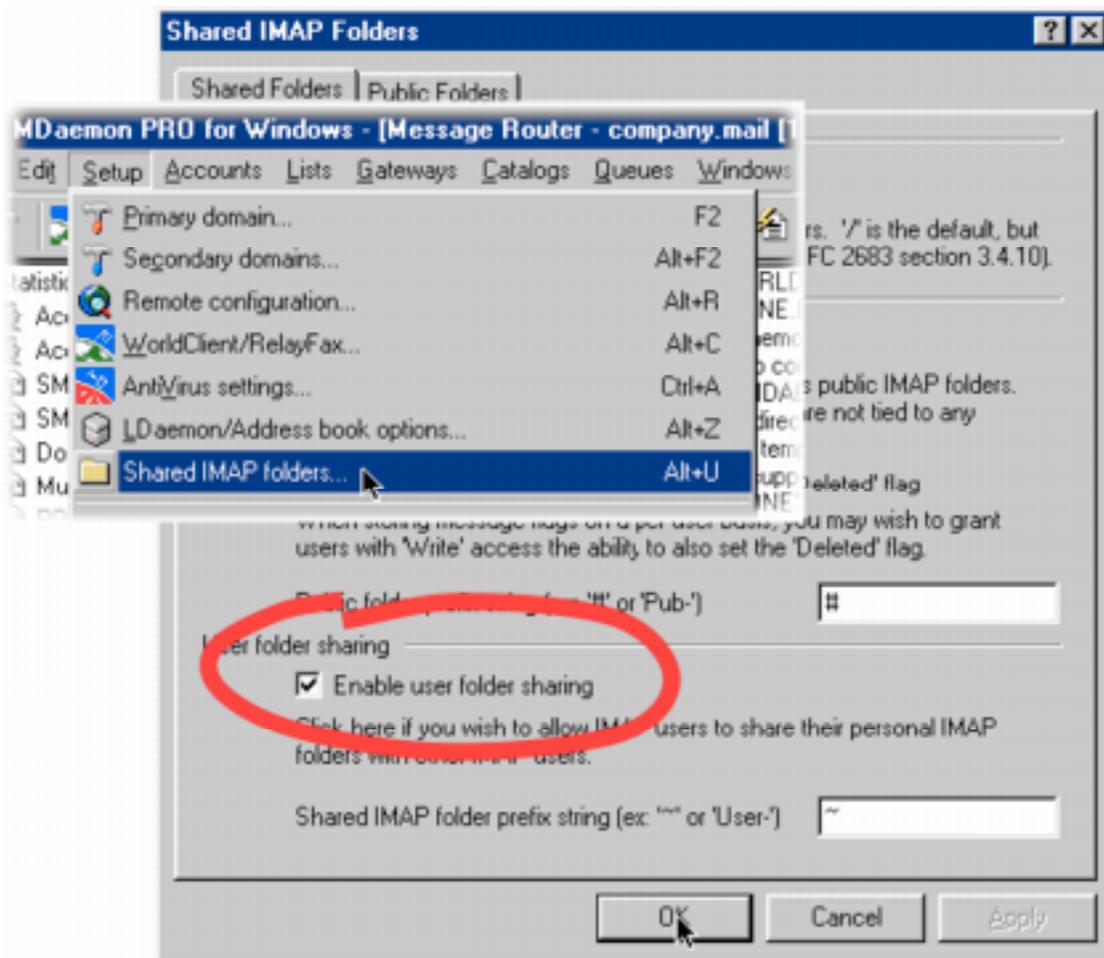The account holder assigns folder sharing permissions to other users or groups of users or both.

Installing, Configuring and Using InsightConnector™

These are not complete user instructions. They are general guidelines with enough details to explain the concepts. Detailed instructions vary depending on the version of Outlook and the InsightConnector.
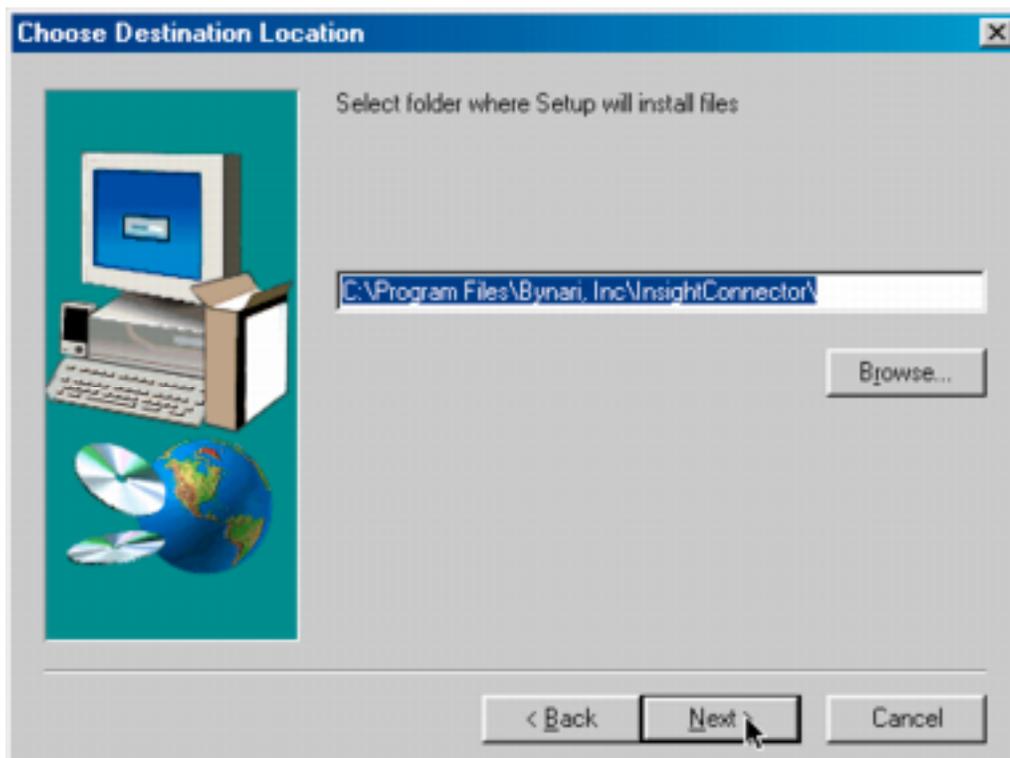
Configuring MDaemon

Before InsightConnector can be deployed, MDaemon must be configured to allow IMAP user folder sharing. Enabling this is an administrative function available through the Message Router software. Using the Shared IMAP folders command in the Setup menu displays the dialog.

Installing InsightConnector

InsightConnector installs using standards Windows methods. The installer contains several panels accessed through the **Next** and **Back** command buttons. The installer suggests closing any other applications. Outlook must not be running.

The installer panels contain introduction, instruction and licensing information. The only user entry required is an installation directory path.

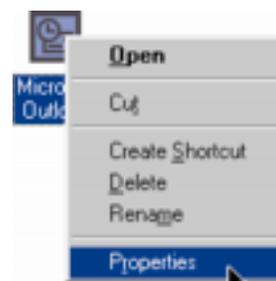Installing the InsightConnector adds a tool bar to Outlook.

The buttons on the tool bar are for selecting and configuring PST files, IMAP mailboxes, sharing and synchronization.

Configuring Outlook

Any Outlook account using InsightConnector must be configured for the Post Office Protocol (POP). It must also have a default PST file selected for storing the mail. The account can be set up through Outlook or through its Properties functions from the desktop.
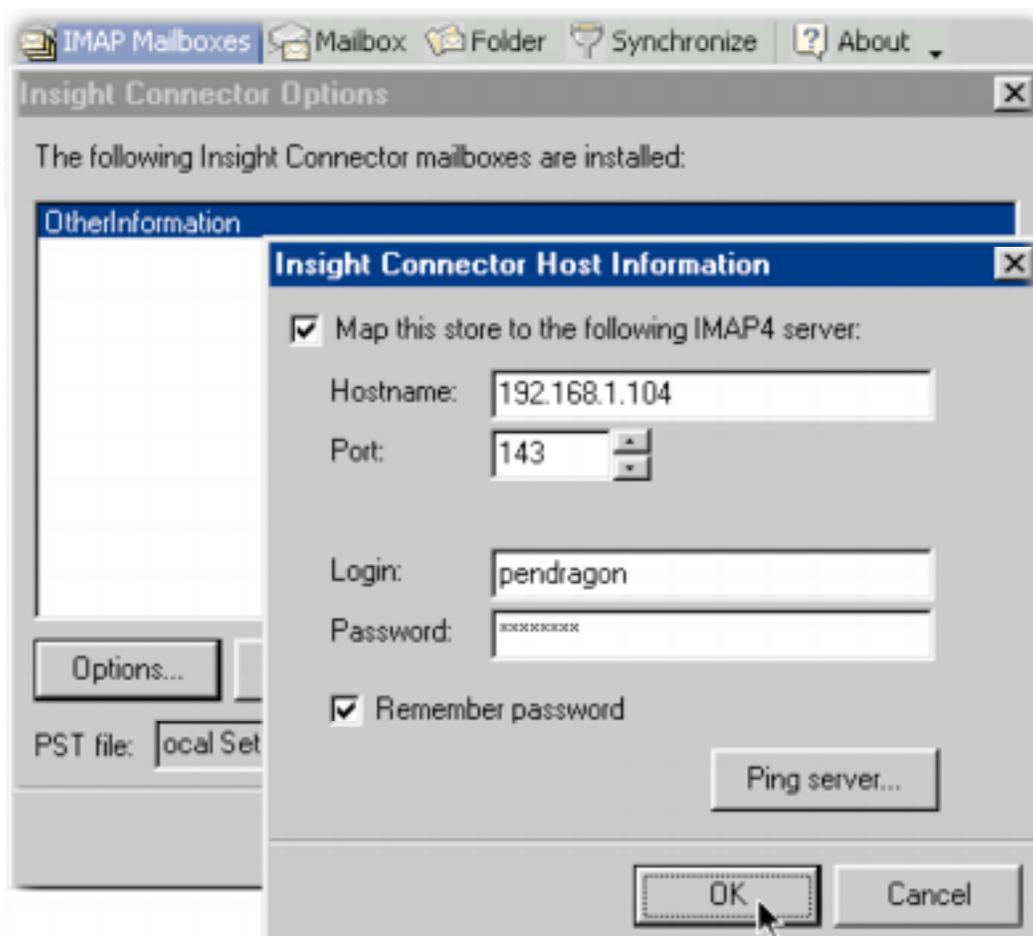
The illustration shows the account settings for Outlook 2002. In this case the POP3 server name is set to **none**, because InsightConnector actually handles the mail through IMAP. The **Test Account Settings** command button checks to see if the account settings actually work on the server. It is normal for the test to generate an error for POP3 functions because POP is **none**.

Configuring InsightConnector

To enable sharing between Outlook and an IMAP server, InsightConnector needs only the IMAP account information and the name of the default PST file (InsightConnector mailbox) for the POP client account.

The **IMAP Mailboxes** command in the InsightConnector toolbar provides access to all of the information. Using the command displays the **Insight Connections Options** dialog. Selecting a PST file and clicking the **Options** command button displays a dialog for entering the IMAP account information. The **Ping server** command button is for verifying the accuracy of the IMAP account data. If the account information is accurate, the connector builds a link between the content of the PST file and IMAP folders on the email server.
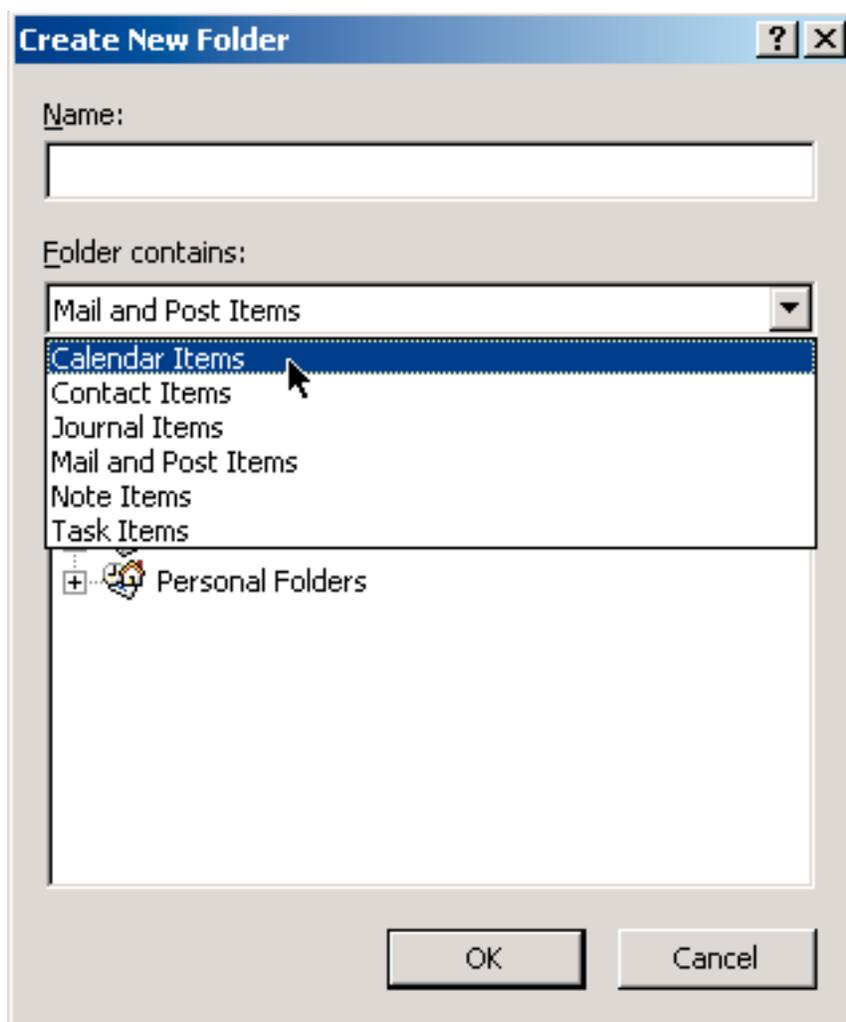
Creating, Sharing and Synchronizing Folders

Sharing folders is the point of InsightConnector. The content resides both in the PST file and in the IMAP folders on the server. The connector keeps the content synchronized at user-specified time intervals.

Creating

InsightConnector can share can share any Outlook folder, both the default folders and those the user adds. User defined folders can contain any type of Outlook information. The illustration shows a dialog for creating an Outlook folder. The user specifies the folder name, content type and location in the folder hierarchy.

Sharing and Synchronizing

The **Folder** command in the InsightConnector toolbar provides access to all of the sharing information. Selecting a folder from the Outlook Folder List and using the **Folder** command displays the **Insight Folder Options** dialog for the chosen folder.

This dialog contains options for setting synchronization times, access permissions and the type of permissions.