ExchangeIt! Usage Guide
for Black Box® IT Pro™ Powered by Nitix™

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INTRODUCTION

What is ExchangeIt!?

ExchangeIt! provides collaboration services running as a fully integrated service on a Black Box® IT Pro™. *ExchangeIt!* works seamlessly with Microsoft Outlook to help you create, organize and share information quickly and easily.

Outlook + ExchangeIt! - What do they do?

For Outlook to work with *ExchangeIt!* a small Outlook plug-in needs to be installed on every workstation that requires *ExchangeIt!* functionality. (*ExchangeIt!* licenses are 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 Nitix "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, including distribution lists to which everyone can access and contribute.
- **Task List Sharing:** Share personal task lists with other users.
- **Group Task Lists:** Maintain shared task lists to which all users or team members can contribute.
- **Journal Sharing:** Share personal Outlook journals with other users.
- **Notes Sharing:** Share Outlook notes with other users.
- **Group Notes Sharing:** Maintain shared notes folders to which all users or team members can access and contribute.
- **Access Control Lists and Shared Folder Permissions:** Give other users or teams the 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.

- RoamingAccess – Outlook will have your synchronized personal folders even if you are on a different computer.
- WebAccess – *ExchangeIt!* data is synchronized with the Nitix WebMail web-based mail and collaboration interface. This allows easy access to modify a user's Outlook data from any browser.

Purpose Of This Manual

This manual will focus on the use of Outlook 2000, Outlook 2002 and Outlook 2003 with *ExchangeIt!*

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

INSTALLATION

Installing ExchangeIt!

SETTING UP YOUR OUTLOOK CLIENT

There are TWO stages to configure *ExchangeIt!*.

1. **Install and configure your email client.**
2. **Install and configure your *ExchangeIt!* plug-in.**

Please Note:

A: You must configure your email client BEFORE you install your *ExchangeIt!* plug-in.

B: In order to use *ExchangeIt!*, you must have an *ExchangeIt!* license for the user account on Nitix.

Software Requirements: *ExchangeIt!* requires Microsoft Outlook 2000, Microsoft Outlook 2002 or Microsoft Outlook 2003 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: 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

The link above will take you to the Web Publishing Wizard for Windows 98 and Windows NT, which also works with Windows 2000. It is the correct version for *ExchangeIt!* calendaring. The Web Publishing Wizard is not required for Outlook 2002 or later.

Configuring Email

If you are already using Outlook 2000 for your email 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 email). Click the *Next* button.
6. Enter your *E-mail Address*. Click the *Next* button.
7. The next screen will ask, "*My incoming mail server is a ____ server.*" Select *IMAP* from the server drop-down list.
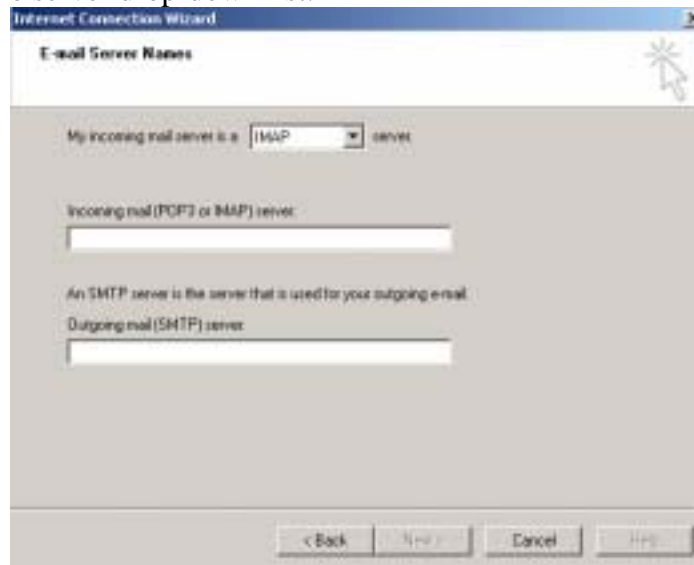
Please Note: We recommend that you use an IMAP mail server. However, *ExchangeIt!* will work with POP3 email servers, but you may lose your ability to have your mail remotely accessible.

8. Enter the name of your *incoming mail server* (this is the name of Black Box® IT Pro™).
9. Enter the name of your *outgoing mail server* (this is the name of the Black Box® IT Pro™).
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 Black Box® IT Pro™). Click *Next*.
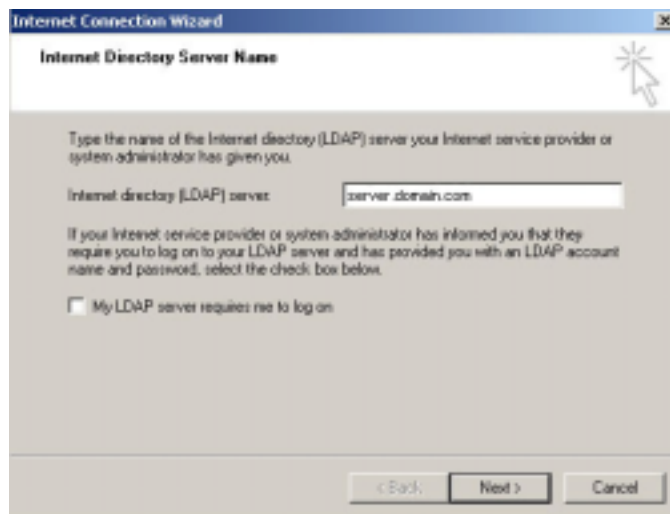
5. It will ask, "*Do you want to check Addresses using this directory service?*" Select *Yes*.
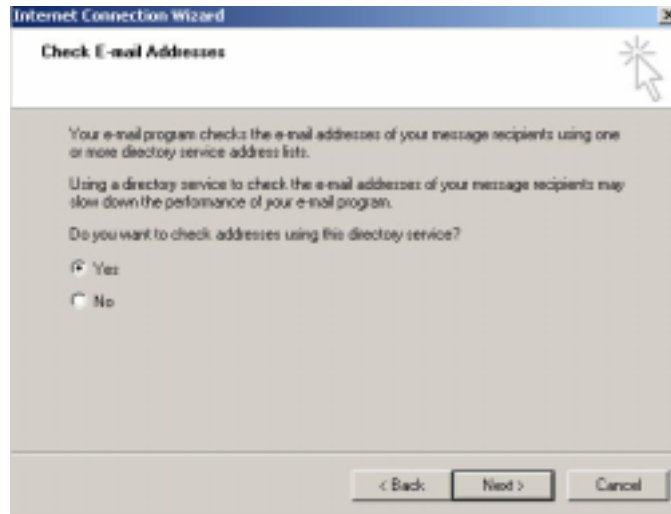
6. Click the *Next* button.
7. Click the *Finish* button.
8. Click the *Close* button.
9. Close Outlook.

Configuring Microsoft Outlook 2002

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 email server type. Select *IMAP*.

Please Note: We recommend that you use an IMAP email server. However, *ExchangeIt!* will work with POP3 email 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.
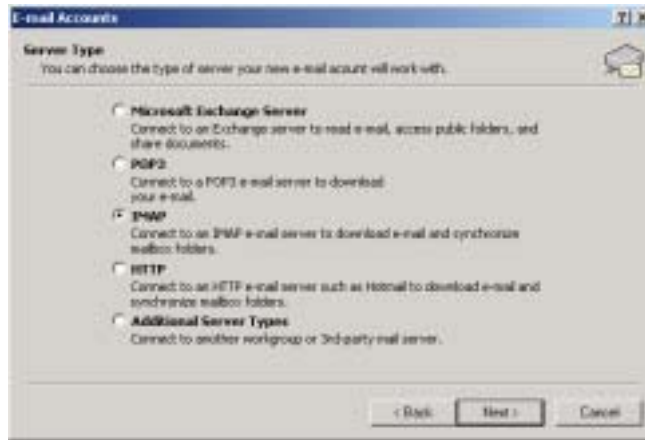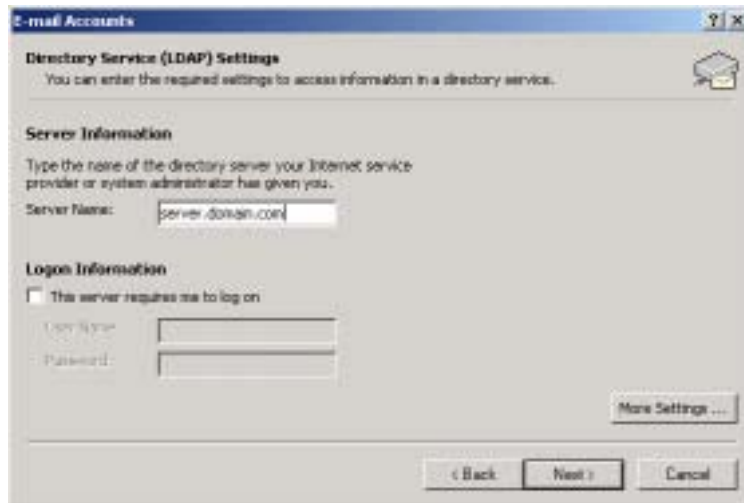10. Click the *Finish* button.

Configuring Microsoft Outlook 2003

Configuring Email

If you are already using Outlook 2003, 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 2003, start at step one (1).

1. Open Microsoft Outlook 2003.
2. The *Outlook 2003 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 email server type. Select *IMAP*.
   Please Note: We recommend that you use an IMAP email server. However, *ExchangeIt!* will work with POP3 email 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.
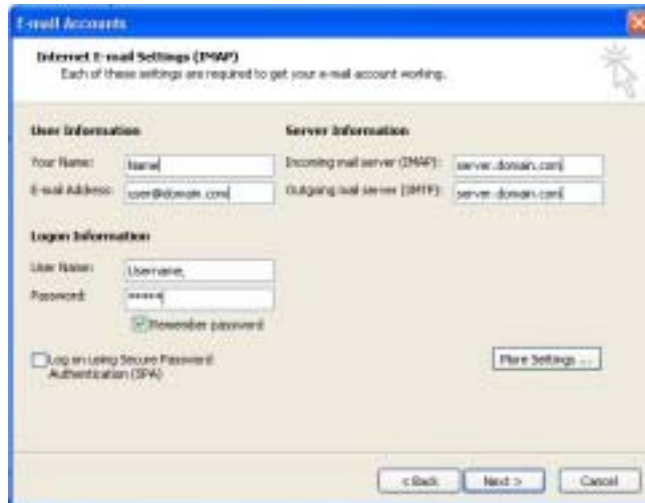10. Click the *Finish* button.

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 and then close the application 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.
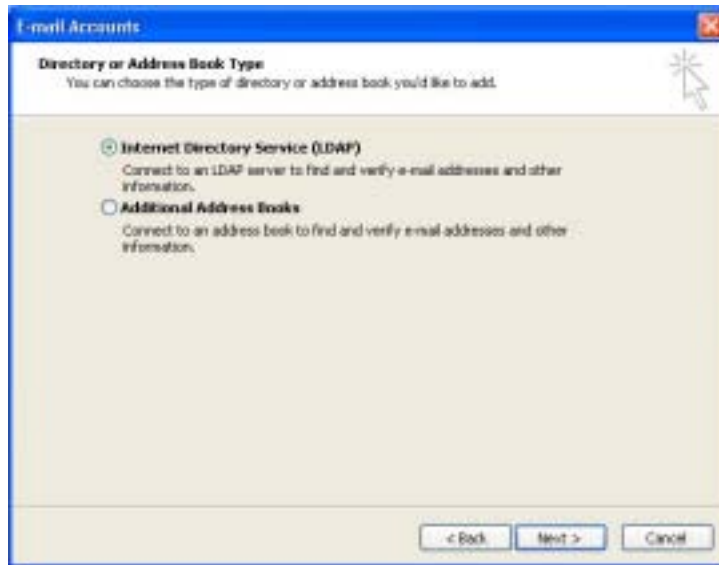6. Click the *Install* button to install the *ExchangeIt!* plug-in in the default destination, **or** select a different folder by using the *Browse* button then click on the *Install* button.
7. Once installation is complete, click the *Close* button.

Configure Outlook to use ExchangeIt!
1. Open Outlook.
2. The *ExchangeIt! Login* window displays:
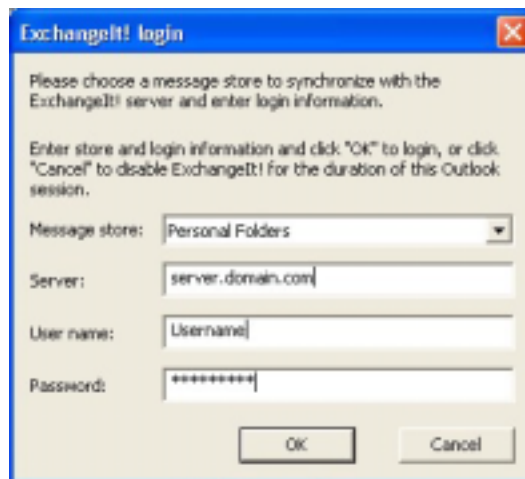
3. Select the *Message store* you wish to have synchronized. The default store is "Personal Folders."
4. Enter the name of your Black Box® IT Pro™. The default name is "calendar."
5. Enter your *User name* and *Password*.
6. Click the *OK* button.

To Enable Synchronization

1. From the Outlook *Tools* menu, select *Options*.
2. Click on the *ExchangeIt!* tab.
3. Ensure that *Automatically synchronize with server every...* is checked.

4. Choose how often you wish the *ExchangeIt!* server and Outlook to synchronize data.
5. 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: email 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".
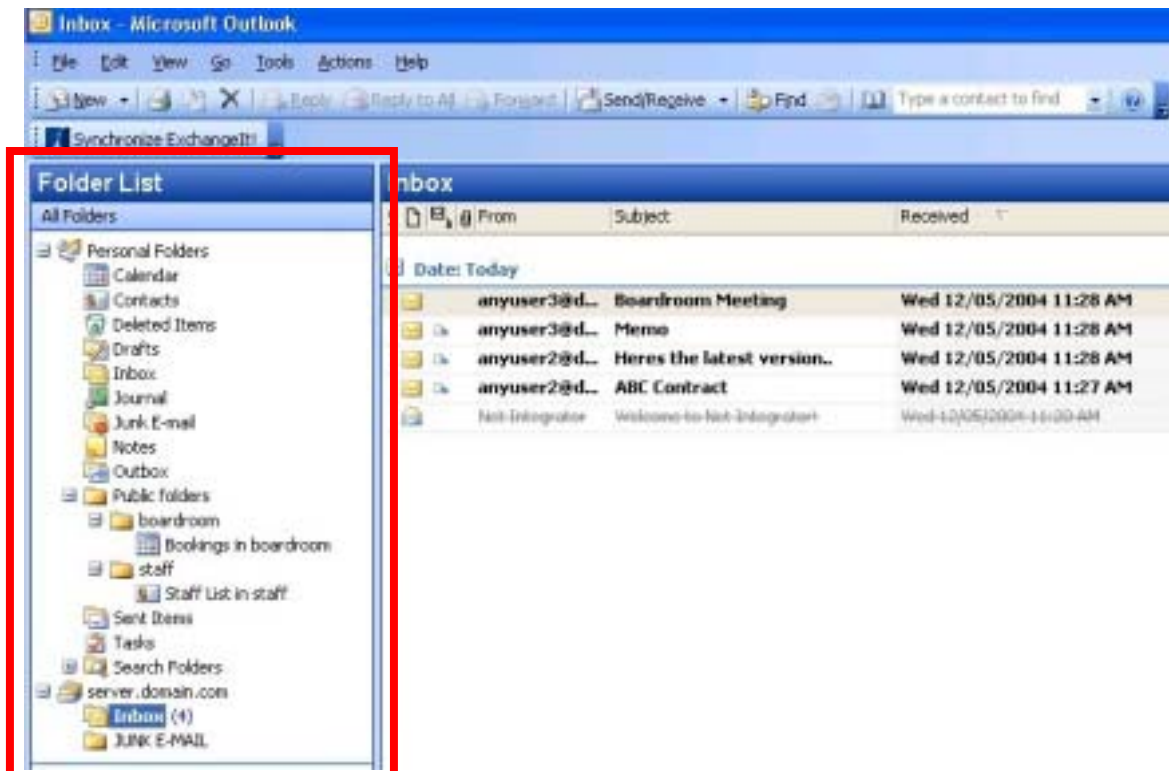
Figure 1

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. The content of these folders can be stored on the *ExchangeIt!* server, your hard drive or a network share. They are configured during the creation of the mail account/profile.

Outlook can access any folders and subfolders in your account on the *ExchangeIt!* server, as well as *Public 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 email will be delivered to the *Inbox* under your *server name*, and not the *Inbox* under your *Personal Folders*.
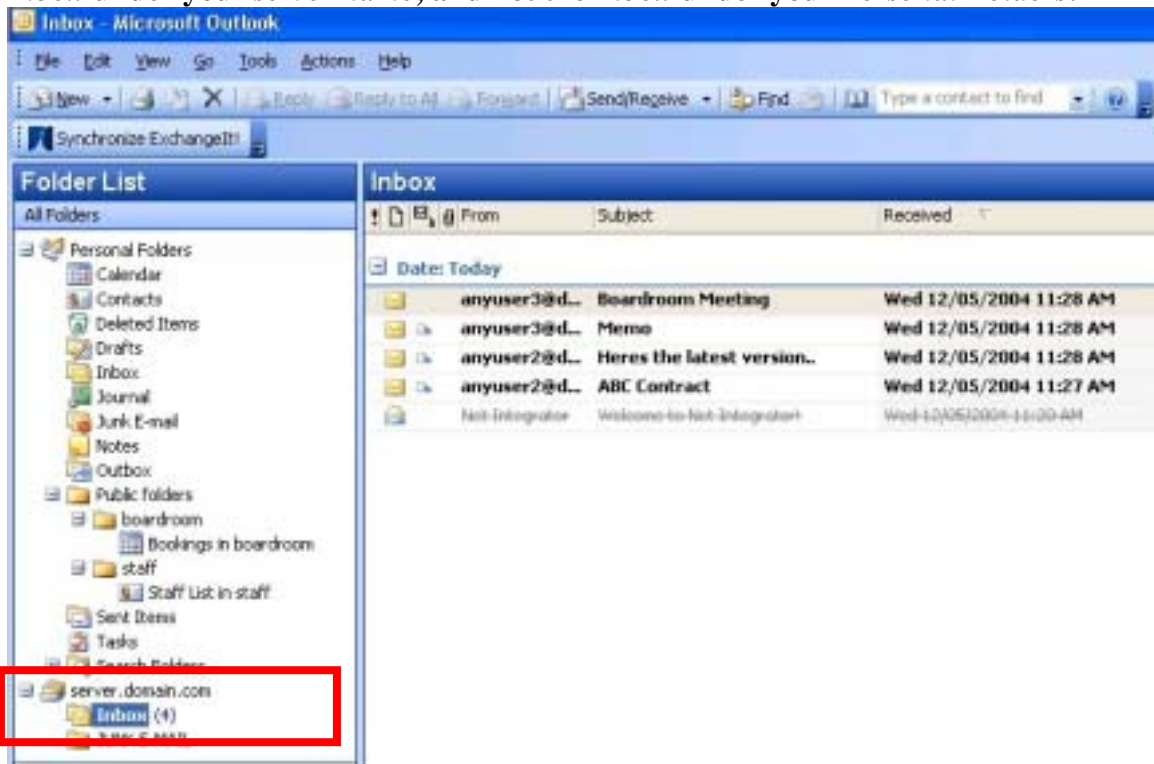
Figure 2

Personal Folders

Personal Folders contain items like your personal *Calendar*, *Contacts*, *Tasks, Notes* and other folder information in subfolders. *Personal Folder* information by default is only accessible by the owner. Subfolders under the *Personal Folder* can be shared by assigning the appropriate permission level (access) to the user, team or account. When you share your *Calendar, Tasks*, *Notes* or *Contacts Folder*, a copy of that data will be synchronized to the *ExchangeIt!* server and your shared *Personal Folder* will show up in the *Public Folder* of the user or team to which you have assigned access.

Public Folders

Public Folders contain items to which you have been allowed access through sharing, either by another person or through your membership to a team account that has shared a resource. In Figure 3 for example, a Contacts list for office staff ("Staff List") was created in the team access folder entitled "staff" under the *Public Folders* so that everyone in the office had permission to look at the contents of the folder.
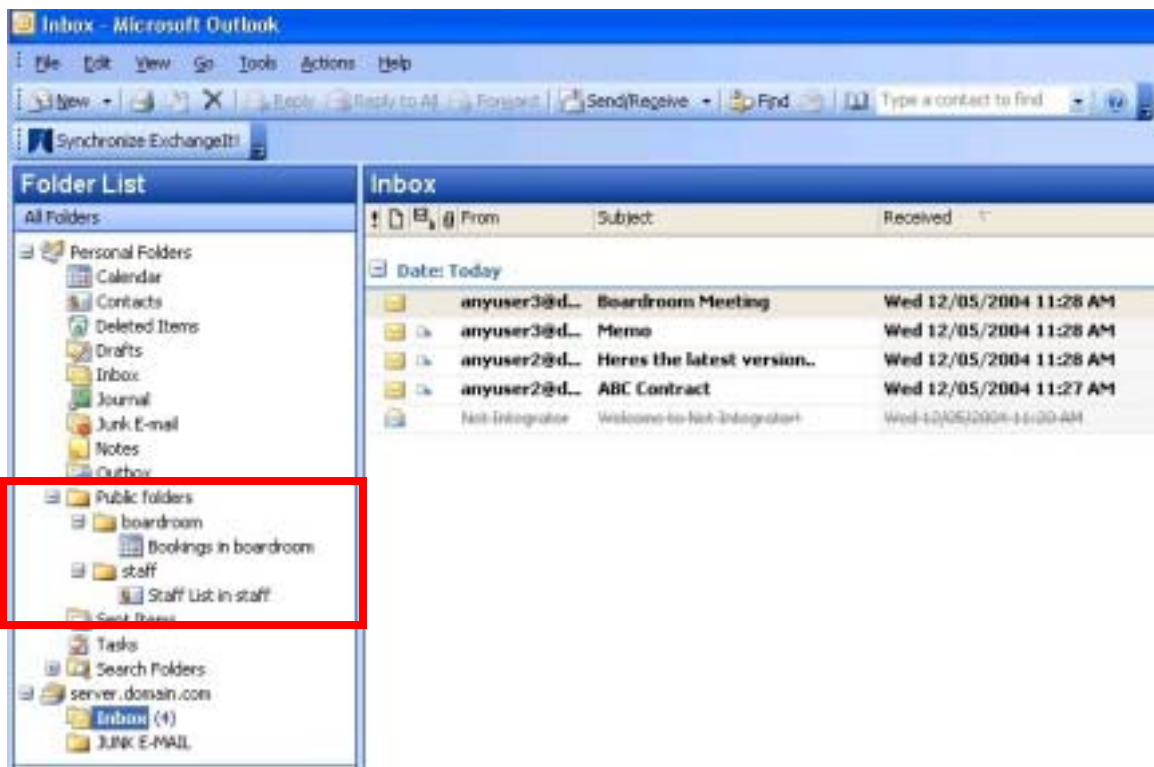
Figure 3

Creating Folders

Personal Folders

To create new folders in your *Personal Folders* to share with other users, follow these steps.

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 4

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.
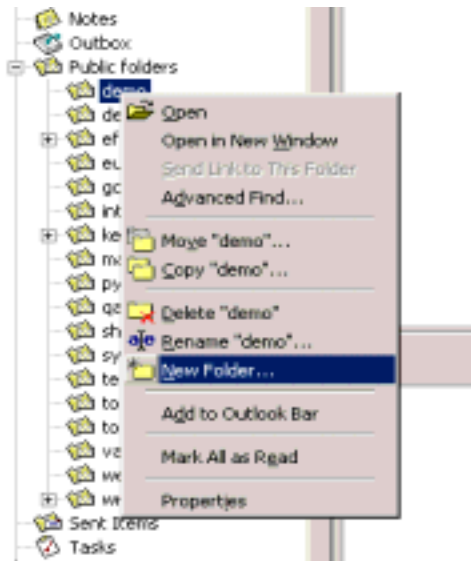
Figure 5
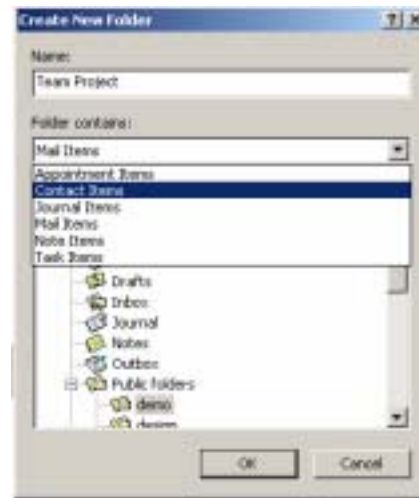
Figure 5b

Using your ExchangeIt! 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*.
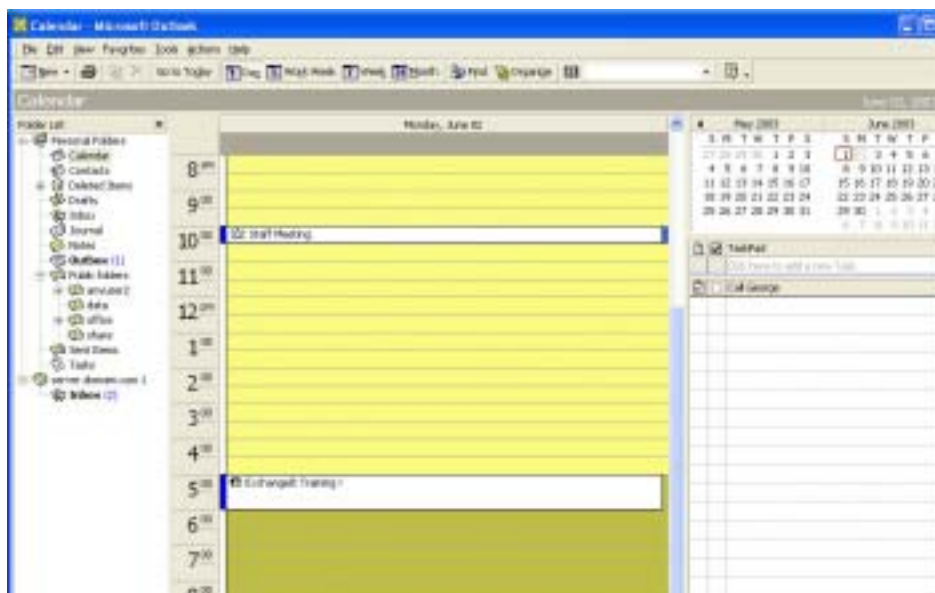
Figure 6

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

The link above will take you to the Web Publishing Wizard for Windows 98 and Windows NT, which also works with Windows 2000. It is the correct version for *ExchangeIt!* calendaring. The Web Publishing Wizard is not required for Outlook 2002 or later.

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).
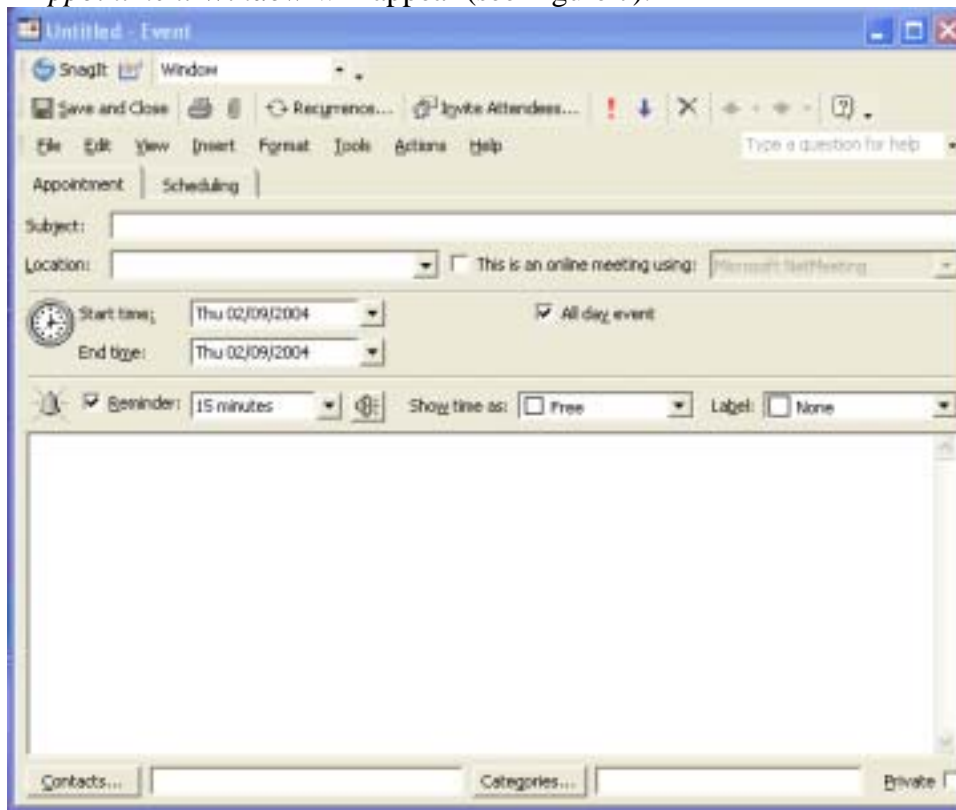
Figure 7

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 *Scheduling* tab.

7. Click on the *Invite Others...* button. Select the names of individuals who should attend the meeting.
8. NOTE: Names can be put in the *Required* or *Optional* attendee boxes.
9. Click *OK* when finished.
10. On the *Scheduling* 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.
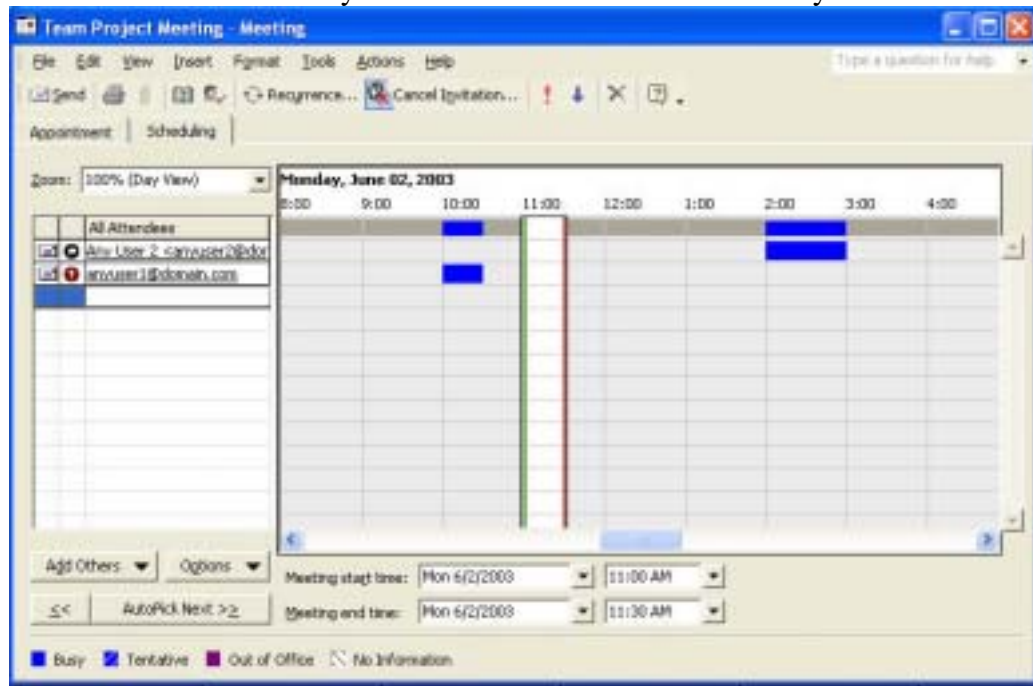
Figure 8

11. At this point, you can change the meeting date, start or end time depending on attendee availability.
12. 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.
13. NOTE: Under Options you can manually Refresh free/busy information.
14. After completing the meeting request, click the *Send* button.
15. The meeting request is then emailed 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 emailed 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.
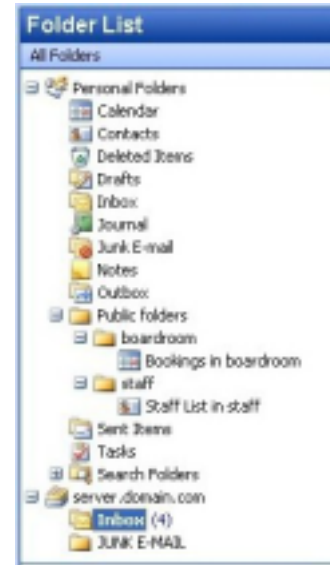
Figure 9

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 with you (Figure 9).

Giving Someone Else Access to Your Folders

To give someone permission to access your calendar in Outlook:
1. Right-click on the folder you wish to share 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).
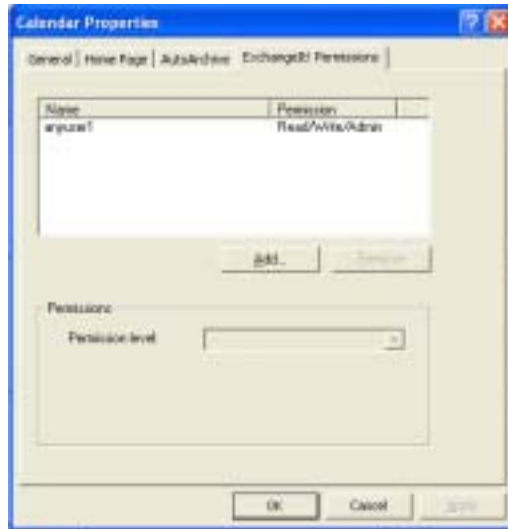
Figure 10

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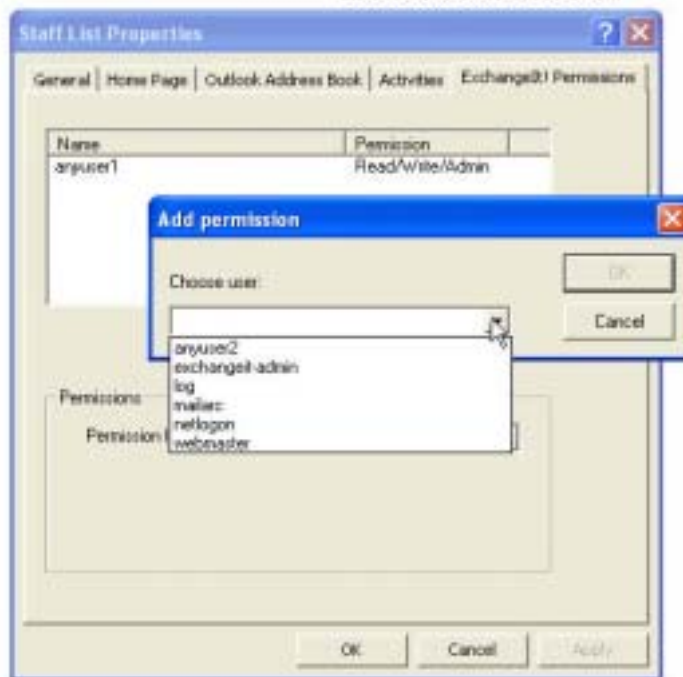
Figure 11

5. Select the user or team to whom you wish to give access to this folder from the *Choose user* drop-down menu and click *OK*. You will be brought back to the screen shown in Figure 10.
6. 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.
7. Click on *Apply*.
8. Click on *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).
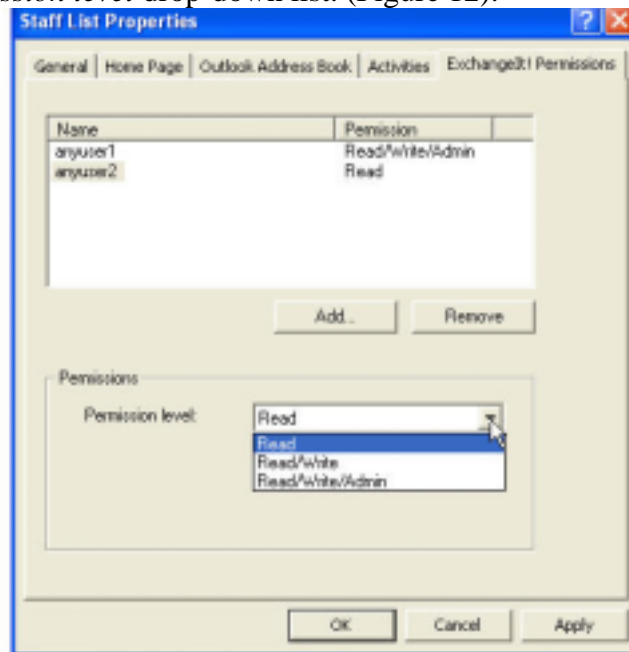
Figure 12

  5. Click on *Apply*.
  6. Click on *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 on *Apply*.
  7. Click on *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 (ACLs). ACLs are used between the Outlook plug-in and the *ExchangeIt!* server to properly share folders and their contents to other users.

It is probably best to understand the behavior of the plug-in and how it interacts with Outlook to accomplish these tasks to allow you to 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 6 setting fields:
   a. Message Store
   b. Server
   c. User name
   d. Password
   e. Automatic Synchronization (only appears if selected from the Outlook Tools -> *ExchangeIt!* dialog box)
   f. Synchronization Period

Message Store

Outlook is capable of using multiple *Message stores*. Most users 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 which you wish to communicate with for synchronization. The default name is "calendar." This is a private DNS entry set by Nitix 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 Black Box® IT Pro™ 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 Black Box® IT Pro™ 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 with appear with confusing results to Outlook.

Enable Automatic Synchronization

By default the automatic 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 on cancel during the request will only disable the *ExchangeIt!* plug-in during that particular Outlook session.

Synchronization Period
The synchronization period sets the intervals (e.g., every minute) at which the *ExchangeIt!* server and the Outlook plug-in synchronize data between Outlook and the server.

Access Control Lists and Permissions (ACLs)

The *ExchangeIt!* server provides access to items based upon permission set on a folder-by-folder basis. Permissions on a folder are inherited by its subfolders and can be overridden.

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 ACL modifications.

NOTE: Viewing of items marked "Private" requires Read/Write/Admin permissions. If a user has administrative privileges on Nitix itself, he/she will have read/write/admin permissions to all *ExchangeIt!* folders, including private items, 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 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 Black Box® IT Pro™; 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 are removed, this is treated as a delete by the 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 IP addresses simultaneously. The IP addresses are tracked, aged, and obsoleted automatically by the server. This allows each user the capability to simultaneously login 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 list under the *ExchangeIt! Permissions* tab. Additionally, their license will not be redistributed to another user. Static license assignment and re-assignment must be done by the Nitix administrator using the WebConfig.

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 is 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 set in the *ExchangeIt! Permissions* tab when usernames 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. This allows for the user to migrate to different workstations and have full access to their *Personal Folder* contents (except *mail* and *Deleted items*). If the user wishes to share the contents to other users, they must explicitly do so by modifying the ACL set in *ExchangeIt! Permissions*, (by right-clicking on the folder and selecting the *ExchangeIt*! *Permissions* tab). Remember that ALL of the folder's contents are shared (except mail and *Deleted items*), so make sure there aren't items in there that you do not wish to share prior to setting the ACL in the *ExchangeIt! Permissions* tab.

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 *ExchangeIt! Permissions* or see the contacts contained within it.

Team Folders

Team and Public Folders
With the integration of *ExchangeIt!* into the core of Nitix, users are able to take advantage of Nitix'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 Black Box® IT Pro™ called "facilities" with only a few members on that team. Create a calendar sub-folder 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 it. 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. Under the *ExchangeIt! Permissions* tab, all teams and users will appear. You can set the *ExcahngeIt! Permissions* to 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. In all cases, individual user permissions on a given folder override any team permissions for that user.

For example – if there is a team with everyone in the company called "everyone," and a sub-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. If someone assigns a particular user read-only access and the user is a member of "finance" then this will override their team permission settings.

Public Folders

If a user has been granted access to another person's folders– a new parent folder will appear called "Public Folders." Beneath the "Public Folders" will appear one or more sub-folders listed by the team name or the username of the user sharing the folder.

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 *ExchangeIt! Permissions*. 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 when the user resynchronizes. The user can delete contents and these items will not be restored when the user is resynchronized.

If the user deletes a folder for which they have read/write/admin permissions, the folder and all its 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 *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!* plug-in. The presence of the

plug-in does not alter this behavior. These are some known issues with Outlook (see the 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 complications 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 email address, and then double-click on the email address.
  - ii) In the *Email 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
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