



**Note:** Before using this information and the product it supports, read the information in "Notices" on page 7.

**Second Edition (November 2004)**

This edition applies to IBM® Lotus® Domino™ Access for Microsoft® Outlook® 6.5.3, and to all subsequent releases and modifications until otherwise indicated in new editions.

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Domino Access for Outlook

## Domino Access for Microsoft Outlook

IBM Lotus Domino Access for Microsoft Outlook allows Microsoft Outlook 2000 or Outlook XP users to connect to an IBM Lotus Domino Server running Domino 6.5.1 or higher. Domino Access for Microsoft Outlook 6.5.3 also supports Microsoft Outlook 2003, on Domino 6.5.3 or higher. If you are upgrading from an earlier Beta version, please refer to the "Upgrade Instructions" before installing.

### System and Outlook Requirements

- Windows OS (Windows 2000 Professional or Windows XP Professional)
- Outlook 2000 with SP2, Outlook XP with SP2, or Outlook 2003 with SP1
- Domino Server running 6.5.1 or higher; 6.5.3 or higher is required for Outlook 2003
- Mail databases created using a Mail6.ntf, Mail6ex.ntf or iNotes6.ntf template

### Client System Memory

- Windows 2000, Professional Edition and Windows XP, Professional Edition with Service Pack 3: 128 MB RAM required; 256 MB or more recommended

### Client Disk Space

- Windows OS: 275 MB disk space

### Setup instructions

#### Domino Users

Although this product is for Outlook users connected to Domino, access through any client connected to Domino is also available. Users can be configured using the standard administration tools provided with Domino, as long as the mail database design is Mail6.ntf, Mail6ex.ntf or iNotes6.ntf.

#### Upgrade Instructions

If you installed an earlier version of this product, you must uninstall it before installing this new version.

### Configuring Outlook to Connect to Domino

#### Administrators

The Domino Access for Microsoft Outlook Setup program is designed to be installed on an End User's system and can be made available on the Network. However, before the user installs this program, you must create the Domino user and supply the Notes ID to the user, together with the user name as defined in Domino, plus the server name and domain for their mail database.

**Note:** The information on configuring Outlook to connect to Domino should be distributed to end users, along with the sections on differences, known problems and migration Issues, listed below. Or, users can find this note as a readme file on [www.Lotus.com/DominoAccessForOutlook](http://www.Lotus.com/DominoAccessForOutlook).

#### End Users

Outlook 2000 users -- if you configured Outlook for Internet Only support, you must reconfigure Outlook for Corporate or Workgroup. To reconfigure Outlook run Outlook and select the menu Options --> Mail Services and select "Reconfigure Mail Support."

**Note:** You must perform Steps 1 and 2 or Domino Access for Microsoft Outlook will not install properly.

1. Set Microsoft Outlook as the default mail program. Open the Control Panel -> Internet Options. Select the Programs Tab->E-mail Option, and then select Microsoft Outlook. (This path may vary slightly depending on which Windows OS you are using and how you have your system set up.)
2. If this is a new installation of Microsoft Outlook, launch the client once to complete the installation process of Microsoft Outlook.

3. While Outlook is open, select Tools->Options->Mail Services and select the option "Prompt for a profile to be used".
4. Execute the Setup Program. You will be prompted for your Notes User Name, and the name of your Mail Server and Domain. You will also be asked to supply your ID (for example jdoe.id). If you are missing any of this information, contact your administrator.
5. (Optional) Select Single Logon Feature to synchronize your Notes ID password with your Windows password. When passwords are synchronized, you can change either password and the change will be made to both passwords.
6. After the installation process is complete, you can launch the Outlook client. Select the profile that refers to the user name just configured during setup. If the mail file contains significant amounts of data, it may take a while to make this data available within Outlook.
7. Should additional profiles be required on a single machine, click Start -> Programs -> Domino Access for Microsoft Outlook, and then select "Create New MAPI Profile." Or, you can relaunch the setup program and choose "Modify" to add additional profiles. The standard options in Outlook to create new profiles are not supported in this release.

### **New Delegation and Calendar Management Features**

The calendar management features lets you set access restrictions on your mail file to allow an someone to manage your mail file. You can specify a group or person as your delegate to read mail, schedule meetings, accept invitations and check your schedule. Using this feature your designated mail manager can perform all of these functions using a single Outlook client.

You can allow delegates to open your mail file and read your messages, calendar entries, and to do items. Additionally, you can allow people to create, edit and delete messages, calendar entries and to do items for you. You determine how much access, if any, other people have to your mail file.

#### **To set access preferences for your mail file:**

1. From Microsoft Outlook, click Tools - Options.
2. Click the Domino Preferences tab and then click Preferences.
3. Click the Access to Your Mail & Calendar tab.
4. Click "Add Person or Group."
5. Choose whether access is for everyone or for a specific group or user. Optionally, click "Select Name" to choose a name or group from a directory.
6. Choose how much access you want people to have to your mail file, for example "All Mail, Calendar, and To Do," or "None."
7. Choose what you want your delegate to do in your behalf, for example "Read any document," or "Read, edit and create any document, send mail on your behalf."
8. (Optional) Check one or both of these options to have your calendar notices forwarded to your delegate:
  - Forward notices where you are the invitee of the meeting
  - Forward notices where you are the chair of the meeting
9. (Optional) Choose what to do if the message is marked as private.
10. Click OK to close the Add People/Groups dialog box, and then click OK again to save these preferences.

#### **To change access to your mail file for a person or group:**

1. From Microsoft Outlook, click Tools - Options.
2. Click the Domino Preferences tab and then click Preferences.

3. Click the Access to Your Mail & Calendar tab.
4. Select the name of the person or group and then do one:
  - Click Remove Selected Person or Group.
  - Change Access, and then select the level of access.
5. Click OK.

### **Managing another user's mail**

If you have access to another user's mail file, you can add their mail file and calendar to your Outlook desktop. For each user, you can specify a mail file threshold, and the number of days mail and calendar entries to load.

1. From Microsoft Outlook, click Tools - Options.
2. Click the Domino Preferences tab and then click Preferences.
3. Click the Access to Others' Mail tab.
4. Click Add Person or Group.
5. Specify the number of days of mail and calendar entries to load.
6. (Optional) Select a name, and then click Remove Selected Person or Group to remove a mail file and calendar from your Outlook desktop.
7. Click OK.

### **Differences between Notes client and Microsoft Outlook client**

- Outlook's "Active Appointments" view does not accurately reflect the number of occurrences in a recurring meeting; however, the calendar accurately reflects the meetings.
- If a Notes invitee requests information in response to a meeting invitation, the Outlook chair will receive an email with their comments.
- Embedded messages can be read only by Outlook recipients. Use Forward or Reply to send existing message content to all users.
- Meeting updates to recurring meetings (not reschedules) are sent as individual items, if a change is made to the series a number of updates will be sent. It is recommended that changes are made to single instances to avoid multiple updates being sent.

For additional information regarding the differences between using Notes and Microsoft Outlook, see the topics "Recurring meetings" and "Working with Domino Access for Microsoft Outlook" in the Domino Access for Microsoft Outlook help.

Administrators may also want to read "MS Exchange-to-Domino conversion tool enhanced" in the 6.5.1 release notes.

### **Known problems and limitations**

#### **Group To Dos/Tasks**

- Task Requests (in Notes, Group To Dos) are not implemented for this release, it is recommended that only personal Tasks are created with this version.
- In Outlook, when forwarding a task that includes an attachment to another Outlook user, the attachment is not forwarded.
- Migrated Tasks (from Exchange to Domino) show an incorrect value for the "% Complete" field and cannot be updated in Outlook. Task requests cannot be accepted.

## **Mail**

### **Sending e-mail**

- X509 certificates are supported only for decryption of incoming mail.
- To ensure full directory access, all directories you want to select must reside in your domain. This release does not provide access to directories that require additional certificates to access, such as directories in different domains. If you cannot access a directory, talk to your administrator.
- It is recommended that complex documents be placed as attachments in e-mail. Microsoft Word is supported as the primary editor and is recommended where available.
- The preferred format for e-mail should be set to Rich Text format for best results.
- Table formatting in some cases may be lost when sending from Outlook; use attachments for complex documents.
- Occasionally Mail appears to stop routing. If this happens, exit Outlook and log out of Windows to restart sending of mail.
- Messages removed from Domino Access for Microsoft Outlook using "shift-delete" are not removed from the server replica. Users should simply delete messages and empty them from their "Deleted Items" folder to ensure proper synchronization of deletes from Domino Access for Microsoft Outlook.

### **Outlook features not supported**

- Outlook's message stationary and background colors are not supported in this release.
- Outlook's footnotes are not supported in this release.
- In Outlook 2002, sending e-mail that has an assigned category is not supported by Domino;
- Follow Up flags are not sent to e-mail recipients if mail is in html format.
- The insertion of pictures, diagrams and objects is not supported in this release; use attachments for these objects.
- In some cases, active URLs in Notes do not replicate as active links in Outlook.
- Once a message has been sent, Domino does not support the ability to expire the message.
- The tracking option "Process receipts on arrival" is not supported in Domino.
- Outlook Rules that are applied to new items currently work only with the "Run Now" option, not as items are added to the inbox.

### **Other**

- There is currently no way to represent LotusScript buttons with Outlook.

## **Calendar & Scheduling**

### **Recurring meetings**

- Deleting recurring meetings, may result in some occurrences remaining on the Calendar.
- Using the forward a instance of a repeat meeting from an Outlook invitee to another does not operate correctly, it recommended that this option not be used for instances of repeat sets as it may result in the meeting being cancelled on the forwarding user's calendar.
- From Notes, if the chair makes a change to an instance of a recurring meeting, the calendar may show duplicate occurrences of the meeting with both the old and the new data for instances of the meeting that occurred prior to the instance that was changed. For example, if the subject for the third occurrence of a recurring meeting is changed, the first and second occurrences may display a calendar entry for a meeting with the old subject and a calendar entry with the new subject.

- From Notes, you cannot create a recurring monthly meeting that occurs two days or dates within a specified time frame. For example, you cannot create a recurring monthly meeting for the second Tuesday and Thursday. The workaround is to create two recurring monthly meetings -- one for Tuesdays and one for Thursdays.
- When using distribution lists, the tracking of responses from invitees will be shown in the optional list. Distribution lists invited via Outlook aren't expanded in Notes, and the invitee appears as "unknown."
- Recurring meetings that are subsequently changed to be "Private" cannot be accepted by the invitee. This can be resolved by changing the end time by 1 minute and then setting the "Private" option.
- If there is a mixture of acceptances and declines, the accept/decline status of invitees and rooms for specific instances of recurring meetings may be incorrect. The original accept/decline notices for the users received by the chair are correct.
- In some cases, invitees added to recurring meetings, where a number of updates are applied, may receive a "Request Out of Date" message when processing updates. It is recommended that the user verify that the changes have been applied to the existing calendar entry, as in some cases they may not be.

### **Autoprocessing**

- When using "Autoprocess," the Chair does not receive an acceptance notice from the invitee, but the meeting is added to the invitee's calendar.
- On the Autoprocess tab, if you enable automatic responses to meeting invitations from specified users, you have the option of choosing a name from the address book. However, you must remove the "@<domain>" portion of the address for this feature to work.

### **Outlook features not supported**

- The fields "Show Time As" and "Categories" are not sent to invitees.
- Although the mail file can be accessed from Outlook or other Notes/Domino clients, it is recommended to modify Calendar data only through the Outlook client. Support for multi-client processing of specific Calendar data will be provided in a future release.
- The Counter Proposal feature (supported in Outlook XP and Notes/Domino only) is not supported for this release. Counter proposals will be delivered as e-mail to an Outlook chair.
- When you create a meeting invitation and save it as draft in Notes/Domino, the addresses are not available when viewed in Outlook.
- If you set an alarm for a specific meeting in Notes, the alarm is not set in Outlook for the same entry.
- If a meeting invitation created in Notes is delegated to an Outlook user, the Outlook user cannot take action on the meeting. However, the meeting may be added to the delegate's calendar.
- The Outlook XP feature creating "Group Schedules" does not operate correctly. It will not save the members of the group when initially created; subsequent edits will be saved and operate correctly.
- The "cc" field is not supported when sending a response to meeting requests, add any additional recipients to the "From" field.
- The Notes/Domino invitee cannot delegate meetings created with an Outlook chair in this release.
- Comments sent by a Notes/Domino Chair or Notes/Domino delegator are not supported when sent to Outlook Chair.

## Other

- Occasionally when accepting/declining multiple updates for a meeting, Outlook may report the error "The messaging Interface has reported an unknown error. If problem persists restart Outlook". Close the entry, and reopen it and accept/decline again. The error should not reappear.
- Addresses selected from the personal contacts and LDAP directories will not show the tracking status of attendees, when creating meeting invitations. They will correctly receive the meeting invitations, and updates and responses will be received.
- If a delegate tries to change the date in an appointment, reminder or all day event that was created by the owner of the mail file, the delegate will get a message that the entry has been changed by another user. The delegate will be prompted "Do you want to make a copy in the default folder for the item?" **Workaround:** Delegate should click yes, and then close the calendar entry. Reopen the calendar and make the necessary changes.

## Address Book

- Distribution lists created in Notes which contain other distribution lists (nested distribution lists) cannot be resolved within Outlook. Nested distribution lists created in Notes are resolved in the Domino server and can be used to send messages. Nested distribution lists created in the Outlook Contact folders are resolved within Outlook and can be used to deliver messages.
- The "Show Names from the:" field may flash several times when the Select Names dialog is opening.

## Exchange to Domino data migration issues

When data is migrated from an Exchange server to a Domino server, most of the data migrates successfully, however there are some exceptions. The list below are the known issues:

- Recurring Meetings have data migration issues in the following instances:
  - If Outlook users decline a recurring meeting invitation from a user before the data is migrated, they will not be able to accept partial updates to the recurring meeting after the meeting data has been migrated.
  - Outlook users should verify recurring meeting schedules and invitee status after migration, in cases where some instances have been declined or rescheduled.
  - If successive instances of a recurring meeting are cancelled or rescheduled, the updates to the schedule data may not migrate correctly.
- Invitees should accept the initial invitation for meetings before migration, otherwise subsequent updates may not be correct.
- When a migrated task includes a .JPG attachment, there may be problems opening the file.
- Information on the Details tab of tasks created in Outlook is lost when the task is migrated to Domino.
- When a Notes user replies with history to a migrated memo that includes an attachment, it may appear that there are two attachments: the original attachment and an image of a file document.

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