



Insight AddressBook 2.x Installation Guide

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- Without Support – 90 day of free product maintenance and upgrades.
- With Support – 1 year product maintenance, upgrades and unlimited email and telephone support.

Available to customers from anywhere.

To contact technical support

Phone 1-214-350-5772 or email: support@bynari.net

For FAQs: <http://www.bynari.net/faq/>



Table of Contents

<i>Technical Support</i>	3
Insight AddressBook Pre-Installation	5
Insight AddressBook Installation	6
Insight AddressBook Configuration	7
Configuring Outlook to Use the Insight AddressBook	10
Configuring Advanced Options	10
Adding/Modifying the Insight AddressBook	12
Enabling SSL for the AddressBook	12
Registering the Insight AddressBook Manually	15



Insight AddressBook Installation

Insight AddressBook Pre-Installation

- This configuration assumes that a working Bynari InsightServer has been installed. (See www.bynari.net for other documents and demo software).
 - The Bynari Insight AddressBook is fully supported with Microsoft® Outlook 98, Outlook 2000, Outlook 2002, and Outlook 2003 and with the Microsoft® Windows® XP platforms and 2000.
 - The Bynari Insight AddressBook will only install on systems where the user has **administrative rights**. The users' rights can be changed to install the Insight AddressBook and then reset to the original rights.
 - The following information is needed to configure the Insight AddressBook. Your system administrator should provide this information to you.
 - The fully qualified hostname of the Bynari Insight Server.
 - Your Bynari Insight Server email ID and password.
 - The license key for the Bynari Address Book.
1. Ensure Outlook and all current services packs and critical updates have been installed.
 2. Ensure that the client already has an account activated on the InsightServer.
 3. Disable any Anti-virus software AND any services associated with it (Outlook should be closed before installing the Insight AddressBook).
 4. If you are upgrading from a previous version of the Insight AddressBook it is not necessary to remove the old version.
 5. Ensure that Outlook is closed.



Insight AddressBook Installation

1. Download the Insight AddressBook .zip file and extract the contents using an un-zip/decompress utility, such as WinZip.
2. Locate and launch the executable file for the Insight AddressBook installer package.
3. After the installshield® initializes and prepares for setup, the Welcome dialogue box will appear, click "next".
4. Read the license agreement and if you agree, click "yes".
5. The next dialogue box will ask for the location of where you would like the program files to reside. If a specific location is desired, change it. If not, click "next".
6. The Insight AddressBook will now install, enter the license key when prompted, click "next".
7. Click "Finish".

Insight AddressBook Configuration

When the installation is complete, start Outlook, and the Bynari Insight AddressBook configuration screen will appear automatically (Figure 1). The Insight AddressBook is configured using this dialog box.

This dialog box can be used any time to add additional Insight AddressBooks or modify an existing Insight AddressBook configuration. See the section titled “Adding/Modifying Bynari AddressBook” to learn how to access the Insight AddressBook configuration.

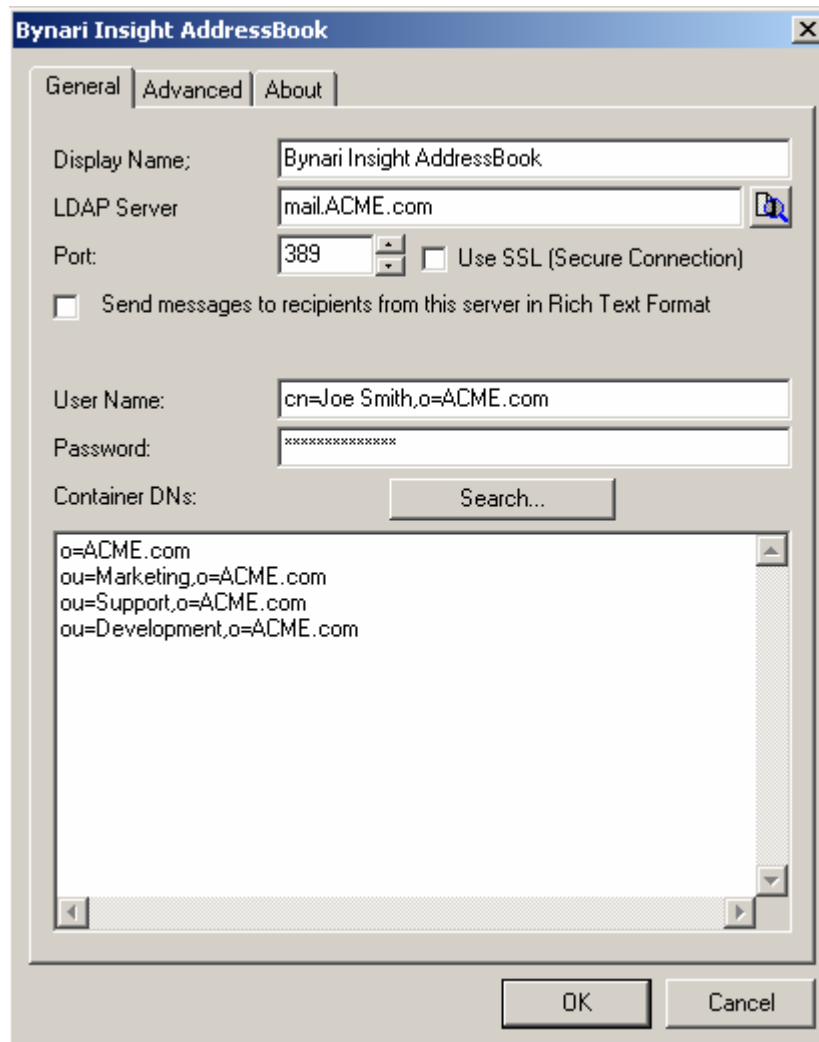


Figure 1 Insight Addressbook Configuration Box

1. Click the “General” tab of the Insight AddressBook dialog.



Insight AddressBook 2.x Installation Guide

2. In the "Display Name" field, enter any name that you wish to use to identify the addressbook such as 'Bynari Insight Address Book'.
3. Enter the Insight Server's fully qualified host name or IP address in the "LDAP Server" box.
4. "Send messages to recipients from this server in Rich Text Format" box:
If checked, recipients using Outlook will be able to see the message with all of its original formatting. If not checked, formatting is not preserved. If the user has selected to send email in HTML format by default (which is the most cross-platform & cross-client compatible method for retaining message formatting), then this format is not needed.
5. Using Insight Server 4.1.0-16 or above, the user name and password are required. This requirement was added to accommodate new features such as private domains and SSL connections.
6. For "User Name", enter the user's "Account Name" , such as:

User Name: **cn=Joe Smith,o=ACME.com**

Password: [mail account password]

(See figure 1)

To determine the exact information for the User Name field, log into the Insight Server as a standard user and click on "Client Configuration." Find the field "Account Name". Use the information under the "Account Name" for the "User Name" field in the AddressBook.

Directory Server Account: LDAP

Server Name: mail.ACME.com

Port: 389

Authenticate: This server requires me to log on

Account Name: **cn=Joe Smith,o=ACME.com**

Password: Use your mail account password

7. "Use SSL" is discussed under the section, "Enabling SSL for the AddressBook".
8. To obtain the value for the "Container DNs" field, click the "Search" Button to search LDAP for user addresses. (DN=Distinguished Name=Account Name)
9. Click the "+" button to expand the Server Root Container (DN=), it will list all your organizations present on that server (Figure 2).

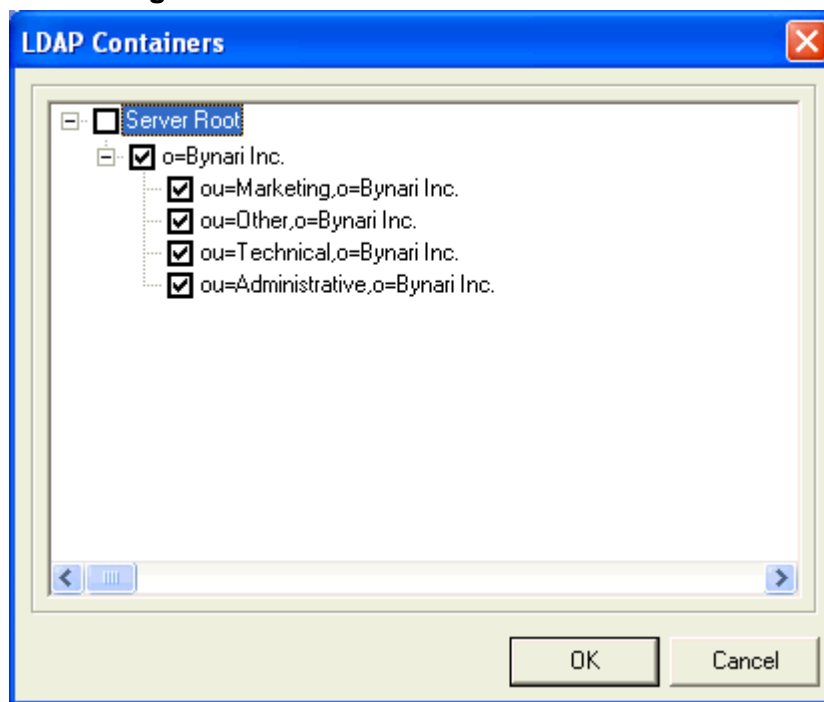


Figure 2 Insight LDAP Containers Box (LDAP containers.gif)

10. Click on the “+” button next to the organizations (o=), and it will display any of the groups (ou=) that have been created (Here you can select which groups the user should have access to).
11. To allow a user to have full access to all the groups, simply place a check for that organization (o=).
12. Click “OK” when done (you will then be returned to the main LDAP configuration dialogue box and you should see all chosen containers).
13. Click on the “Advanced” tab.
14. Click the bottom “Detect” button, if configured correctly, an information pop-up box will appear stating that a successful connection was made to the LDAP Server.

Note: If only the organization was selected in the previous step, Click on the “Advanced” tab, and put a check under “Display sub-containers contents of the LDAP containers” (This is an optional step, but required for a user to have full access to the LDAP database).

15. At this time, register the product. If you wish to use the Insight AddressBook in demonstration mode, free 30 day trial, then the product can be registered later. Simply click “ok” to finish the configuration. If you do wish to register the product at this time, continue with step 13.
16. While still in the Insight AddressBook dialog box, click the “Register” button at the bottom (this button will only be available if the product has not been registered).



Insight AddressBook 2.x Installation Guide

17. A dialog box will open to insert a product license key. Type in the license key into the top field.
18. Click 'OK' and then click 'OK' on the Insight AddressBook dialog box.

Configuring Outlook to Use the Insight AddressBook

Your LDAP database will now display when you select "To" from any message you compose. To configure Outlook to resolve email addresses from the Address Book, follow these steps:

1. Open the Outlook Address Book by clicking on 'Tools' and 'Address Book'. The 'Address Book' dialog window will be displayed.

2. Click on 'Tools' and 'Options'. In older versions of Outlook click on 'Help' and 'Options'.

The 'Addressing' dialog window will be displayed.

3. Click 'Add'. The 'Add Address List' dialog will be displayed.

4. Select Insight AddressBook email group (from the ou= value configured above) in the list.

5. Click 'Add'.

You should be returned to the 'Addressing' dialog window.

6. Click 'Apply'.

7. Click 'OK'.

Configuring Advanced Options

To configure more/advanced options for the AddressBook, select the "Advanced" tab. See figure 3 below.

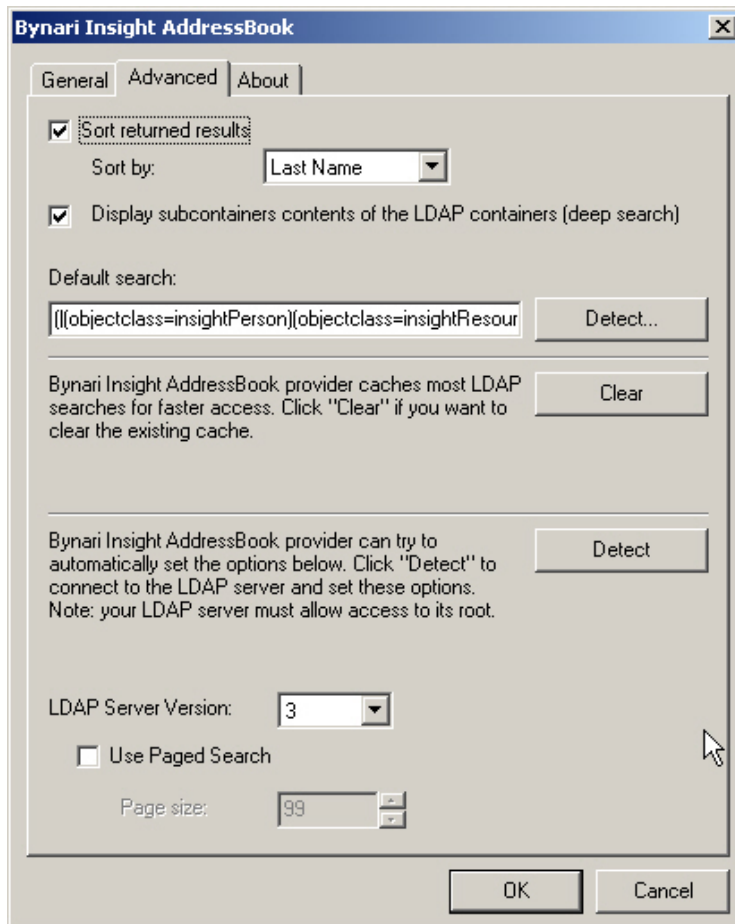


Figure 3 AddressBook Advanced Options

Below are descriptions for all the “Advanced” AddressBook settings:

Sort returned results - allows for sorting the contents of each group container or result set by a specific value (Last Name, First Name, etc)

Display sub-containers contents of the LDAP containers (deep search) - displays the contents of a group, and all its sub-groups in a single list (i.e. shows: company, department, users)

Default search - this is the LDAP filter used when searching for entries, the “Detect...” button can auto detect the correct value for Insight Server v3.x and 4.x.

Note: The default values listed here are for Insight Server 4.x.

LDAP Server Version - the version of the LDAP protocol used to communicate with the server, Insight Server 4.1.x uses LDAP Server protocol version 3. Insight Server 4.0.x uses version 3 or 2; Insight Server 3.x uses version 2.



Insight AddressBook 2.x Installation Guide

Paged Search - this limits the number of search results returned by the LDAP server. This feature works with LDAP server protocol Version 3 only.

Note: Paged Search is not supported by the Insight Server because it is not necessary. Insight Server will show all the search results as a default.

Adding/Modifying the Insight AddressBook

If at any point you need to edit or change your LDAP configuration, go to:

In Outlook 98 and 2000:

1. Click 'Tools' and 'Services' in the Outlook menu. This will display the 'Services' dialog window.
2. To add a new the Insight AddressBook, click 'Add' and select 'Insight Address Book' from the resulting 'Add Service to Profile' dialog window.
3. To modify an existing Insight AddressBook double click on it in the 'Services' dialog window.

In Outlook XP/2002 and 2003:

1. Click 'Tools' and 'E-mail Accounts' in the Outlook menu. This will display the 'E-mail Accounts' dialog windows.
2. To add a new Insight AddressBook select 'Add a new directory or address book' and click 'Next'. Then select 'Additional Address Book' and click 'Next'. Now select 'Insight Address Book' from the list of available address book providers.
3. To modify an existing Insight AddressBook, select 'View or change existing directories or address books' and click 'Next'. Double click on the Insight AddressBook that you wish to change in the resulting list.

Enabling SSL for the AddressBook

Insight AddressBook allows for secure SSL/TLS encryption for all contact information. To enable a secure connection with the AddressBook, follow these steps:

1. Import the Insight Server Certificate on a Windows Machine
 - a. Copy /opt/insight/etc/ssl/server.pem to the windows machine from the server
 - b. Edit the copied file (NOT THE ORIGINAL) and remove the top portion (all text be-



Insight AddressBook 2.x Installation Guide

tween and inclusive of: -----BEGIN RSA PRIVATE KEY----- and -----END RSA PRIVATE KEY-----)

- c. Save the file with an extension of .crt
- d. As an administrator (domain or local) double click on the newly saved .crt file
- e. Click the "Install Certificate" button
- f. Click the "Next" button
- g. Choose to "Place all certificates in the following store"
- h. Click the "Browse" button
- i. Check the "Show physical stores" checkbox
- j. At the top of the list, expand the "Trusted Root Certification Authorities" and select the "Local Computer"
- k. Click the "OK" button
- l. Click the "Next" button
- m. Click the "Finish" button

2. Go to the Bynari Insight AddressBook configuration, click "Use SSL" (figure 4). To get to the AddressBook, please see the section above, Adding/Modifying the Insight AddressBook.

3. Click OK

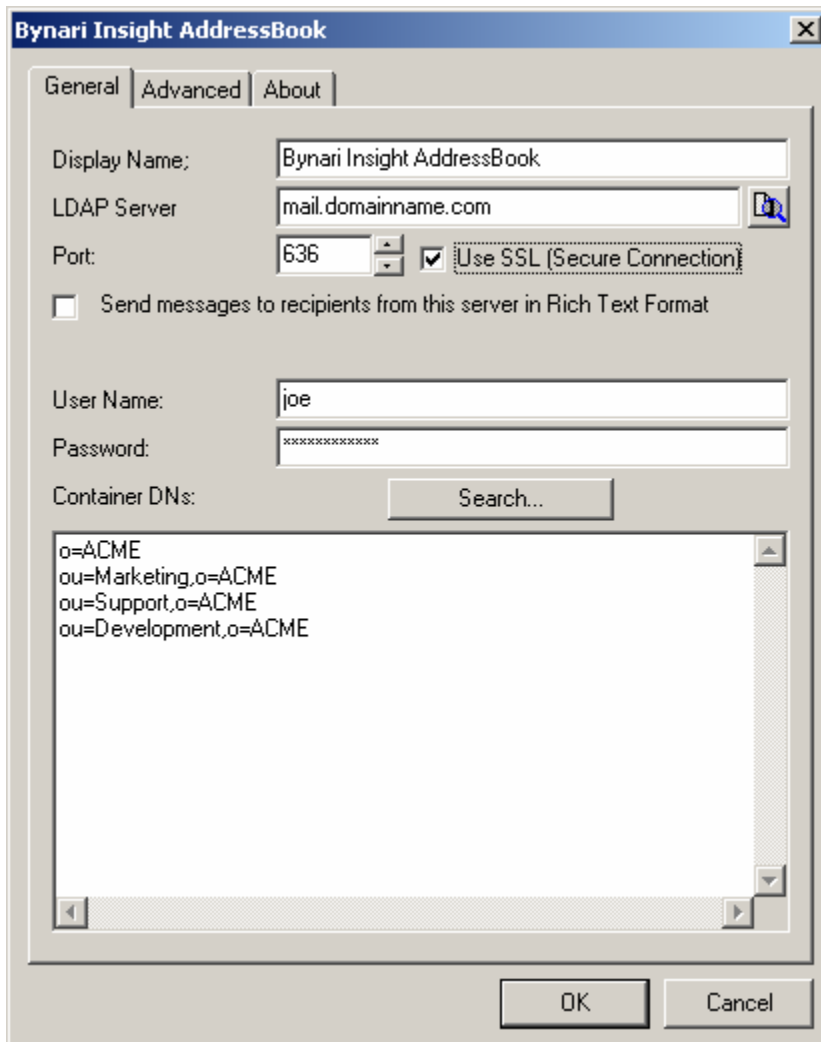


Figure 4 Insight Addressbook Configuration Box

Note: This enhancement imports the server's certificate on a machine-wide basis and only needs to be configured once per workstation.

Alternatively, if you want to be user specific so that not all users are SSL enabled, each user can import the certificate themselves (if the .crt file is made available to them).

The user only needs to select "Automatically select location based on certificate" - users on a machine which has had the mentioned procedure applied, will be able to use the SSL option.



Registering the Insight AddressBook Manually

Both the InsightConnector and the Insight AddressBook should register automatically when entering the license key as described in section, Insight AddressBook Configuration, steps 14-16. If the product fails to register, manual validation will be required.

Normally the license key is passed via the Internet, through port 80, to the Bynari Key Validation Servers (<http://register.bynari.net>). The key is then validated against the key validation servers.

Note: If the workstation resides behind a firewall and port 80 is blocked, port 3080 can be configured for automatic registration and validation of the license key.

To manually validate a license key;

1. Ensure that the License Key dialogue box is opened
 - a. For the InsightConnector this is normally opened during the installation or by clicking "About" (from the InsightConnector toolbar) → click "Register".
 - b. For the Insight AddressBook, this is normally opened during the installation or by clicking Tools → E-mail Accounts → View or change existing directories or address books → Click "Next" → Double click on the Bynari Insight AddressBook → Click "About" → Click Register.
2. Ensure that you have your license key entered in the top field (figure 5).
3. Click the "Key Support" button (Figure 5).

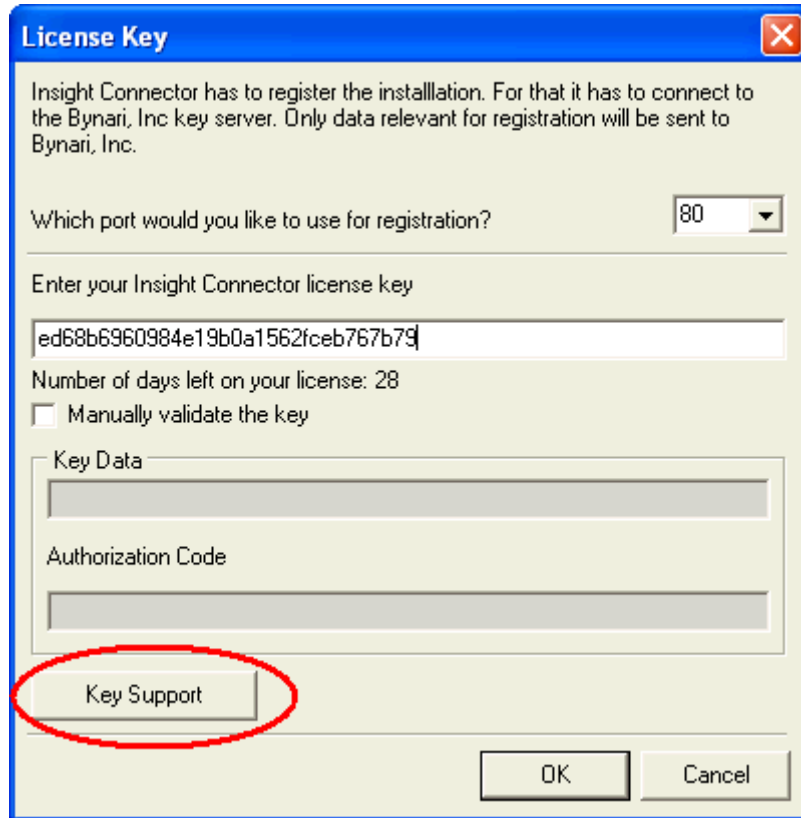


Figure 5 Key Support button (License Key.gif)

4. Copy and paste the contents of the dialogue box that opens into an e-mail and send to Bynari, Inc. Support (support@bynari.net).
5. A Bynari representative will contact you as soon as possible and provide validation information to enter into the "Key Data" and "Authorization Code" fields (Figure 6).

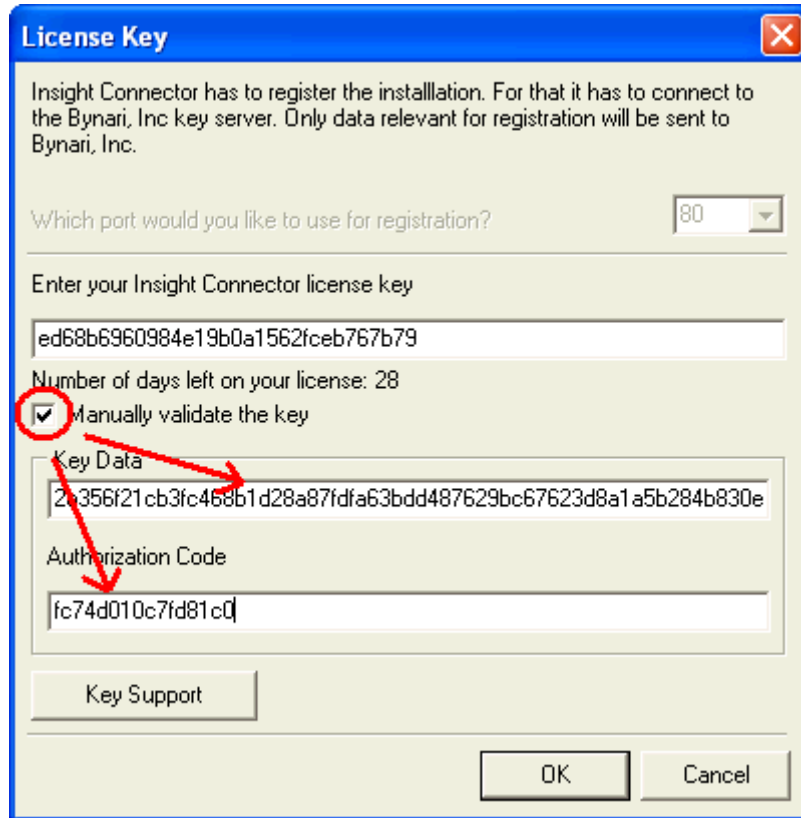


Figure 6 Manually entering the information (Manual validation.gif)

6. Click "OK" to finish the registration process.