



Version 2.0.0rc1

*Native Microsoft Outlook Configuration Guide*

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# About this Guide

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This guide will walk you through the installation and configuration of the native Microsoft Outlook compatibility layer SOGo offers.

This guide also includes instructions for configuring Microsoft Outlook with SOGo.

The instructions are based on version **2.0.0rc1** of SOGo.

The latest version of this guide is available at  
<http://www.sogo.nu/downloads/documentation.html>.

# Introduction

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SOGo is a free and modern scalable groupware server. It offers shared calendars, address books, and emails through your favourite Web browser and by using a native client such as Mozilla Thunderbird and Lightning.

SOGo is standard-compliant. It supports CalDAV, CardDAV, GroupDAV, iMIP and iTIP and reuses existing IMAP, SMTP and database servers - making the solution easy to deploy and interoperable with many applications.

SOGo features :

- Scalable architecture suitable for deployments from dozen to many thousand users
- Rich Web-based interface that shares the look and feel, the features and the data of Mozilla Thunderbird and Lightning
- Improved integration with Mozilla Thunderbird and Lightning by using the SOGo Connector and the SOGo Integrator
- Native compatibility for Microsoft Outlook 2003, 2007 and 2010
- Two-way synchronization support with any SyncML-capable devices (BlackBerry, Palm, Windows CE, etc.) by using the Funambol SOGo Connector

SOGo is developed by a community of developers located mainly in North America and Europe. More information can be found on <http://www.sogo.nu>

# Installation

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This section will guide you through the installation of the native Microsoft Outlook compatibility layer SOGo offers.

Building everything from the sources is currently required for distributions other than Red Hat Enterprise Linux (or CentOS) version 5 and version 6. In upcoming versions, packages will be made available for major distributions. In the meantime, you can also use the *ZEG* (Zero-Effort Groupware), which is a virtual appliance prepared for VirtualBox. In this case, you can jump to Chapter 4, *Configuration*.

## Red Hat Enterprise Linux v5 or v6

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If you are using Red Hat Enterprise Linux (or CentOS) version 5 or version 6, packages for Samba4, OpenChange and SOGo and the SOGo OpenChange backend are available in the form of nightly builds. If you prefer using this, please follow the instructions from [http://www.sogo.nu/english/downloads/backend\\_nightly.html](http://www.sogo.nu/english/downloads/backend_nightly.html) .

Once ready, install the following packages on top of an existing SOGo installation: `samba4`, `openchange` and `sogo-openchange-backend` .

Once the packages are installed, refer to the Configuration chapter from this guide.

## Debian 6.0 (“Squeeze”) and Ubuntu 11.10 (“Oneiric Ocelot”)

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Samba4, OpenChange and SOGo and the SOGo OpenChange backend are now available in the form of nightly builds. If you prefer using this, please follow the instructions from [http://www.sogo.nu/english/downloads/backend\\_nightly.html](http://www.sogo.nu/english/downloads/backend_nightly.html) .

Once ready, install the following packages on top of an existing SOGo installation: `samba4`, `openchange` and `sogo-openchange`.

Once the packages are installed, refer to the Configuration chapter from this guide.

## Installing from sources

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The current build instructions are based on Ubuntu 11.04. The source packages for Oneiric were used in order to get the latest version of GNUstep – which is v1.22. Instructions should be slightly adapted for other distributions.

The following sources were added in `/etc/apt/sources.list` :

```
deb http://archive.ubuntu.com/ubuntu oneiric main restricted universe
deb http://archive.ubuntu.com/ubuntu oneiric-updates main restricted
universe
deb http://security.ubuntu.com/ubuntu oneiric-security main restricted
universe
```

## Prerequisites

---

In order to build all components from source, you need to install the following prerequisites :

```
build-essential autoconf2.59 ccache pkg-config python python-dev subversion
git-core flex bison docbook-xsl xsltproc libpopt-dev libical-dev libsqlite3-
dev libmagic-dev libboost-thread-dev zlib1g-dev doxygen monotone gnustep-
make gnustep-base-runtime devscripts debhelper libgnustep-base-dev gobjc
libxml2-dev libldap2-dev libssl-dev zlib1g-dev libpq-dev libmysqlclient-dev
libmemcached-dev bind9utils
```

## Samba 4

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First, we need to **checkout** the source from the SOGo branch of the OpenChange's SVN server:

```
mkdir openchange
cd openchange
svn co -r 3923 https://svn.openchange.org/openchange/branches/sogo
```

Next, we compile Samba 4. The following steps have to be done since OpenChange makefiles are configured to install Samba 4 under `/usr/local/samba` :

- ❑ Tell ld.so about the non standard location of Samba 4 libraries

```
sudo su -c 'echo "/usr/local/samba/lib" > /etc/ld.so.conf.d/samba4.conf'
sudo su -c 'echo "/usr/local/samba/lib/ldb" >>
/etc/ld.so.conf.d/samba4.conf'
```

- ❑ Update PKG\_CONFIG\_PATH and PYTHONPATH

```
sudo su -c 'echo
"PKG_CONFIG_PATH=$PKG_CONFIG_PATH:/usr/local/samba/lib/pkgconfig; export
PKG_CONFIG_PATH" >> /etc/profile.d/samba4-env-build.sh'
sudo su -c 'echo
"PYTHONPATH=$PYTHONPATH:/usr/local/samba/lib/python2.7/site-packages; export
PYTHONPATH" >> /etc/profile.d/samba4-env-build.sh'
. /etc/profile.d/samba4-env-build.sh
```

Once the environment is set, use the `samba` target to build and install samba4. This requires internet access from the host since it fetches the source code tarball from the samba web site. These commands can be run as a normal user with sudo access. The current code only works with `samba-4.0.0alpha17`. This is defined in `script/samba4_ver.sh`

```
cd sogo
make samba
sudo ldconfig
```

At this point, Samba 4 should be installed under `/usr/local/samba/`.

## OpenChange

---

Once Samba 4 is installed, launch the OpenChange configure scripts:

```
./autogen.sh
./configure --prefix=/usr/local/samba
```

This should yield an output similar to the following:

```
=====
OpenChange Configuration (Please review)
```

```
* OpenChange Libraries:
- libmapi (C library):      yes
  Thread support:         yes (pthread)
- libmapi++ (C++ library): yes
- libmapiadmin:           yes
- libocpf:                 yes

* OpenChange Server:
- mapiproxy:               yes

* OpenChange mapistore backends:
- sqlite3:                 no

* OpenChange Tools:
- openchangeclient:        yes
- mapiprofile:             yes
- openchangeadmin:        yes
- exchange2mbox:          yes
- exchange2ical:          yes
- mapitest:                yes
- openchangemapidump:      yes
- schemaIDGUID:           yes

* subunit format (mapitest): no

* OpenChange Documentation: yes

* Coverage Tests:          no

* OpenChange Bindings:
- Python:                  no
- Qt4:                     no

* Installation prefix:     /usr/local/samba
```

=====

Compile and install OpenChange:

```
make
sudo make install
sudo ldconfig
```

## SOGGo and SOPE

---

First, you must get the SOGo and SOPE sources from Inverse's source repository.

```
mtn db init --db=~/.db.mtn
mtn --db=~/.db.mtn pull inverse.ca ca.inverse.sogo
mtn --db=~/.db.mtn pull inverse.ca ca.inverse.soape
cd $HOME
mtn --db=~/.db.mtn checkout --branch ca.inverse.sogo SOGo --revision
19df67a347106e2e3f51c36766416cf4c3279bee
mtn --db=~/.db.mtn checkout --branch ca.inverse.soape SOPE --revision
000e03baf62d699266017ea7e9681fbbfe262382
```

SOPE has to be installed first since SOGo depends on it:

```
cd SOPE
./configure --with-gnustep --enable-debug --disable-strip
make
sudo make install
Compile and install SOGo:
cd ../SOGGo
./configure --enable-debug
make
sudo make install
```

## SOGGo OpenChange Connector

---

Finally, once all prerequisites are installed, you can install the SOGo OpenChange connector.

To do so, execute the the following commands:

```
cd OpenChange
make
sudo PKG_CONFIG_PATH=$PKG_CONFIG_PATH make install
```

# Configuration

---

In this section, you'll learn how to configure the native Microsoft Outlook compatibility layer that SOGo offers.

## SOGo Configuration

---

First thing to do is to configure SOGo to use your current services, which are your IMAP, SMTP and SQL database servers. The configuration instructions for this are available in the *SOGo Installation and Configuration guide* available from <http://www.sogo.nu>

Please refer to that documentation before continuing with the instructions included in this guide.

An IMAP server supporting the UIDPLUS and QRESYNC IMAP extensions is also required, such as Cyrus IMAP 2.4 or later. Also make sure you use GNUstep v1.22 or later.

## OpenChange Configuration

---

Run the following commands as root:

```
provision --realm=example.com --domain=OPENCHANGE --adminpass='%10OpenChange'  
--server-role='domain controller'
```

Provision the OpenChange server by running the following commands:

```
openchange_provision
```

NOTE: This operation can take several minutes

- [+] Step 1: Register Exchange OIDs
- [+] Step 2: Add Exchange attributes to Samba schema
- [+] Step 3: Add Exchange auxiliary classes to Samba schema
- [+] Step 4: Add Exchange objectCategory to Samba schema
- [+] Step 5: Add Exchange containers to Samba schema
- [+] Step 6: Add Exchange \*sub\* containers to Samba schema
- [+] Step 7: Add Exchange CfgProtocol subcontainers to Samba schema
- [+] Step 8: Add Exchange mailGateway subcontainers to Samba schema
- [+] Step 9: Add Exchange classes to Samba schema

```
[+] Step 10: Add possSuperior attributes to Exchange classes
[+] Step 11: Extend existing Samba classes and attributes
[+] Step 12: Exchange Samba with Exchange configuration objects
[SUCCESS] Done!
```

```
Provision the OpenChange database:
openchange_provision --openchangedb
```

```
Setting up openchange db
```

```
[+] Public Folders
```

```
=====
* Public Folder Root                0x0100000000000001
* IPM_SUBTREE                        0x0200000000000001
* NON_IPM_SUBTREE                    0x0300000000000001
* EFORMS_REGISTRY                    0x0400000000000001
* OFFLINE_ADDRESS_BOOK               0x0500000000000001
* /o=First Organization/cn=addrlists/cn=oabs/cn=Default Offline
Address Book 0x0600000000000001
* SCHEDULE+ FREE BUSY                0x0700000000000001
* EX:/o=First Organization/ou=Exchange Administrative Group (UBUNTU-
OC) 0x0800000000000001
* Events Root                        0x0900000000000001
```

## Samba 4 Configuration

---

Add the following parameters to the [global] section of the `/usr/local/samba/etc/smb.conf` (`/etc/samba4/smb.conf` or if you use the RPMs) configuration file:

```
### Configuration required by OpenChange server ###
dcerpc endpoint servers = epmapper, mapiproxy
dcerpc_mapiproxy:server = true
dcerpc_mapiproxy:interfaces = exchange_emsmb, exchange_nsp, exchange_ds_rfr
### Configuration required by OpenChange server ###
```

As Samba 4 will be started as `root`, the SOGo configuration file will be looked up under `root`'s home directory. Create the following symbolic link to make sure that Samba 4 finds the configuration file:

```
ln -s ~/sogo/GNUstep /root/
```

Start Samba 4 :

```
sudo samba -d5 -i -M single
```

At this point Samba 4 should be running in the frontend in interactive mode. The logs can be found in `/usr/local/samba/var/samba.log` when Samba 4 runs daemonized.

Alternatively, you can create the following Upstart script in `/etc/init/openchange.conf`:

## Chapter 4

```
description "openchange"

start on runlevel [23]
stop on runlevel [!23]

pre-start script
. /usr/share/GNUstep/Makefiles/GNUstep.sh
end script

expect fork
exec /usr/local/samba/sbin/samba --debug-stderr -d0 -M single
>>/usr/local/samba/var/openchange.log 2>&1
respawn
```

Then, you can start or stop Samba 4 using “start openchange” or “stop openchange”. If you use the RPMs, everything will be controlled with the `/etc/init.d/samba4` script.

# Adding Users

---

Users that wish to connect natively to SOGo must be provisioned, for now, in Samba 4 and in OpenChange – even if they already exist in your current LDAP / Microsoft Active Directory server. Also, the passwords must match between directory services.

To add an user, execute the following commands:

```
# add user to samba
samba-tool domain passwordsettings set --complexity=off
samba-tool domain passwordsettings set --min-pwd-length=1
samba-tool user add <username>
samba-tool user setexpiry <username> --noexpiry
```

```
# create user in openchange
openchange_newuser --create <username>
```

Important note: the mode of authentication in use by Windows with Samba and Exchange servers prevent the backend from actually knowing the real password being used by the user. This implies that the IMAP server configured for use by the SOGo backend must accept any password from the host on which Samba is running. Due to the different type of IMAP servers, it is left to the reader to find a way to implement this securely in her/his installation.

# Microsoft Outlook 2003, 2007 and 2010 Configuration

---

To connect Microsoft Outlook, you can either use the IP address of the server or its DNS name. If you prefer using the DNS name, add an entry like the following to the `c:\windows\system32\drivers\etc\hosts` file in order to associate the IP address with the right DNS name:

```
192.168.1.1      sogo.example.com
```

Next, you must configure Microsoft Outlook.

- Open the Control Panel => Mail => Email Accounts.
- Select *Add a new e-mail account*
- Choose *Microsoft Exchange Server*
- Fill the required information. Enter the DNS name or the IP address of your SOGo server in the *Microsoft Exchange Server* field
- Leave the *Use Cached Exchange Mode* checkbox enabled
- Enter your username in the *User Name* field
- Click on *More Settings* and ignore the warning, if any, about Exchange being offline by clicking on *Cancel*
- From the *Security* tab, enable *Always prompt for user name and password*
- Finally, click on *Check Name* and confirm your username and password

Start Microsoft Outlook and enter your username and password. It should will start to synchronize your mailbox. This could take a long time if you have many emails, events, tasks and contacts.

# Known Issues or Limitations

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## Precautions

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- Make sure you periodically backup all your data regarding SOGo.
- Make sure you have no firewalls activated between your Microsoft Outlook clients and the SOGo server with Native Outlook Compatibility module.

## Current Limitations

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The current version of the Native Microsoft Outlook compatibility layer has some limitations.

Those limitations will be overcome in the upcoming release candidates. If you are interested in having those limitations fixed more rapidly, please contact Inverse by sending an email to [support@inverse.ca](mailto:support@inverse.ca).

### General

- The Microsoft "Outlook Anywhere" protocol is currently not supported.
- If you can't see any email's content with Microsoft Outlook 2007, install the latest Service Pack available from Microsoft's website for this specific version. Microsoft Outlook 2007 (12.0.6423.100) SP2 MSO (12.0.6425.1000) is known to work.
- When you create a new Microsoft Outlook profile, not all folders might be synchronized during the first start. Simply select the appropriate folder and click "Send and Receive". Synchronizing a folder may take some time. For example, a folder with 1000 email messages might take around 5 minutes based on the underlying hardware.
- Errors when synchronizing the "Offline Address Book" are normal and can be ignored for now.
- If you face strange issues from Microsoft Outlook, you might want to remove any data associated with the user from the SOGo server and recreate a Microsoft Outlook profile. To remove any data associated to a user, remove the content (and not the directories themselves) of the following directories: `/usr/local/samba/private/mapistore/SOGo/<username>/` and `/usr/local/samba/private/mapistore/SOGo/<username>/`

### **Mail**

- Sharing mail folders is not supported.

### **Calendar**

- Free-busy information will not be displayed properly on Outlook 2007 and 2010
- Labels will not work.

### **Tasks**

- Tasks with start/due dates created from Outlook might not appear correctly in SOGo due to a timezone issue.
- Reminders are not yet supported.

### **Contacts**

- Categories will not work.
- Under Microsoft Outlook 2010, the special folder "Suggested Contacts" will not work.

### **Notes**

- Notes are not synchronized in any ways with SOGo. The current version of SOGo lacks support for notes.

If you notice anything else, please send contact Inverse by sending an email to [support@inverse.ca](mailto:support@inverse.ca).

## Additional Information

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For more information, please consult the online FAQs (Frequently Asked Questions):

<http://www.sogo.nu/english/support/faq.html>

You can also read the mailing archives or post your questions to it. For details, see:

<https://inverse.ca/sogo/lists>

# Commercial Support and Contact Information

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For any questions or comments, do not hesitate to contact us by writing an email to:

[support@inverse.ca](mailto:support@inverse.ca)

Inverse (<http://inverse.ca>) offers professional services around SOGo and Funambol to help organizations deploy the solution and migrate from their legacy systems.