

## Macintosh Requirements for UCOP Exchange Access

### System Requirements for Office 2004 Professional Edition

- Hardware: 700 MHz native\* PowerPC G3, G4 or G5 processor
- Operating System: Mac OS X version 10.2.8-10.3; Mac OS X version 10.3 is required for the Power Mac G5
- Memory: 512 MB of RAM
- Hard Disk<sup>1</sup>: 3 GB of available hard-disk space

Check the below website for system requirements for other versions of Office 2004:

<http://www.microsoft.com/mac/howtobuy.aspx?pid=sysreq>

Make sure the Office install is up to date; you can run the utility located in /Applications/Microsoft AutoUpdate, this will check the Microsoft Mac update site, download and install the latest updates for Office 2004. The most current version available as of July 11<sup>th</sup>, 2006, is version 11.2.5, see screen shot below.



Microsoft AutoUpdate

Check to make sure the latest Office patches are installed.

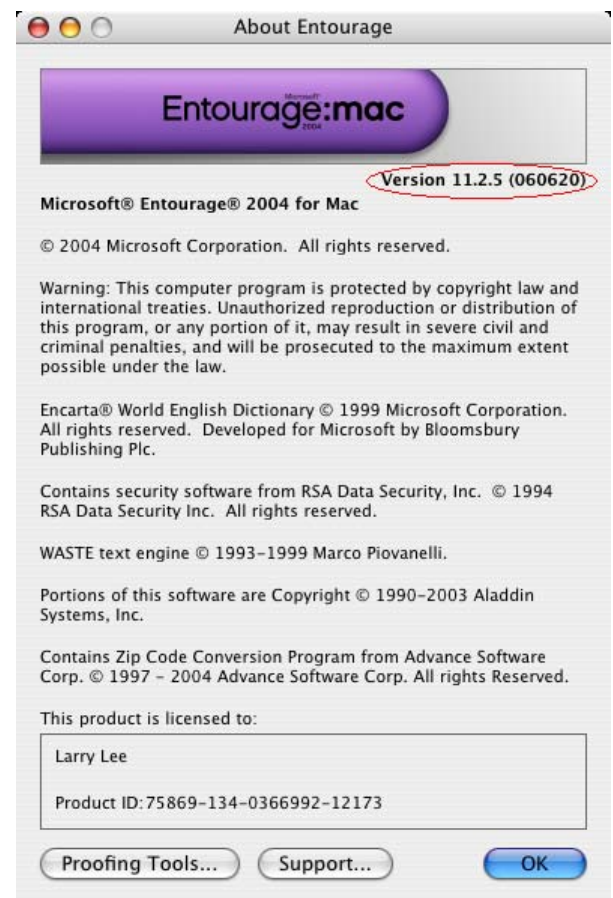
There are a couple of different ways to check the version of Office installed on your mac, below is two simple ways to determine.

Navigate to your applications folder and find the Microsoft Office 2004 folder and open it. /Applications/Microsoft Office 2004. Find the Entourage application, click on the icon one time to select, then either go to Finder and select “Get Info” or with the application selected type  $\mathfrak{H}$  + I (apple key + letter “i”), this will bring up the “About Entourage” screen.

Make sure the version is 11.2.5, if not run the Microsoft AutoUpdate mentioned above.

Once you have updated your Office 2004 version to 11.2.5, you are ready to setup Entourage to access your UCOP exchange account.

***Note: Office for X is an earlier version of Office released prior to Office 2004, this version will not be supported and we recommend updating to Office 2004. Entourage X can be setup to access UCOP exchange; however there are known problems or bugs with this version.***



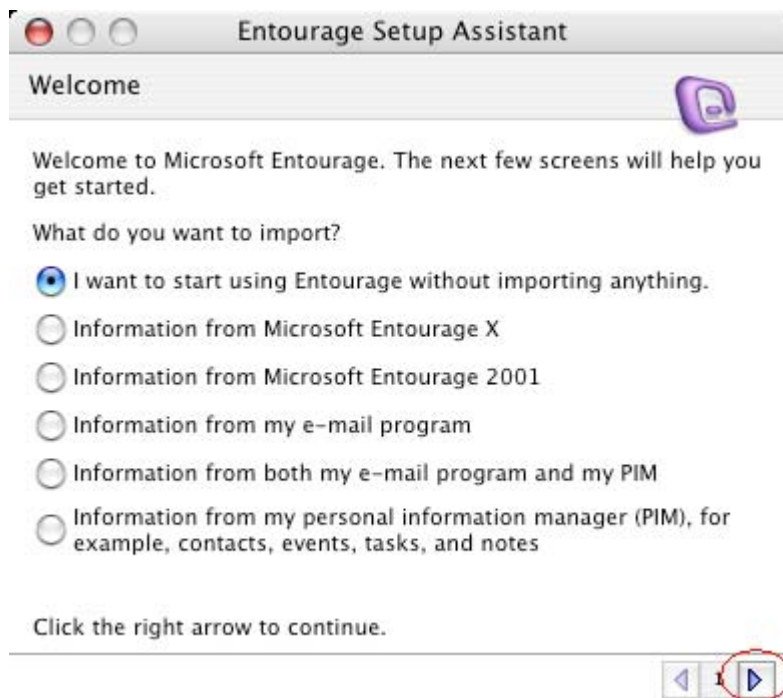
## Setting up Entourage 2004 with Setup Assistant

If you have not launched Entourage prior, the Setup Assistant will launch and walk you thru the setup. If you have launched Entourage, or want to configure manually, jump to step #11 of the reference document to setup Entourage manually.

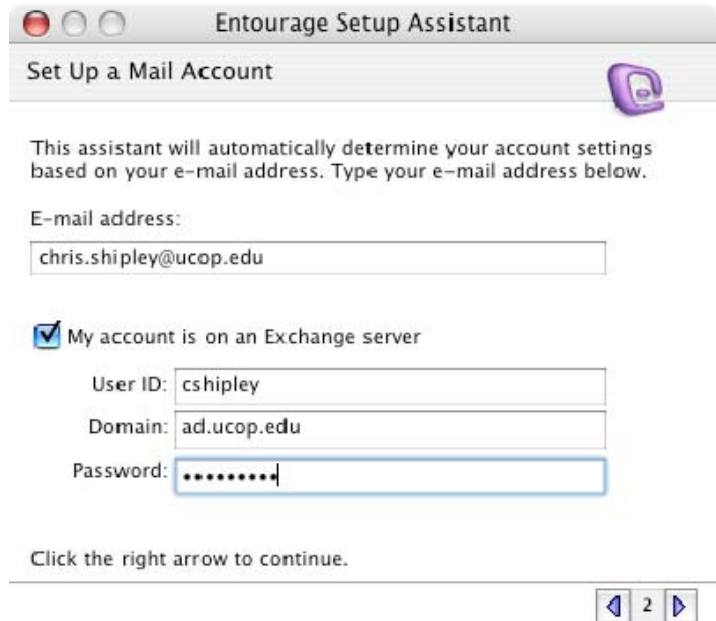
- 1) Launch Entourage, the application can be found either in the /Applications folder, inside the Microsoft Office 2004 folder (/Applications/Microsoft Office 2004) or an icon will be placed in the dock. View of icon on the left.
- 2) Next the Setup Assistant will start. Select the option to start using Entourage without importing anything, click right arrow to continue.



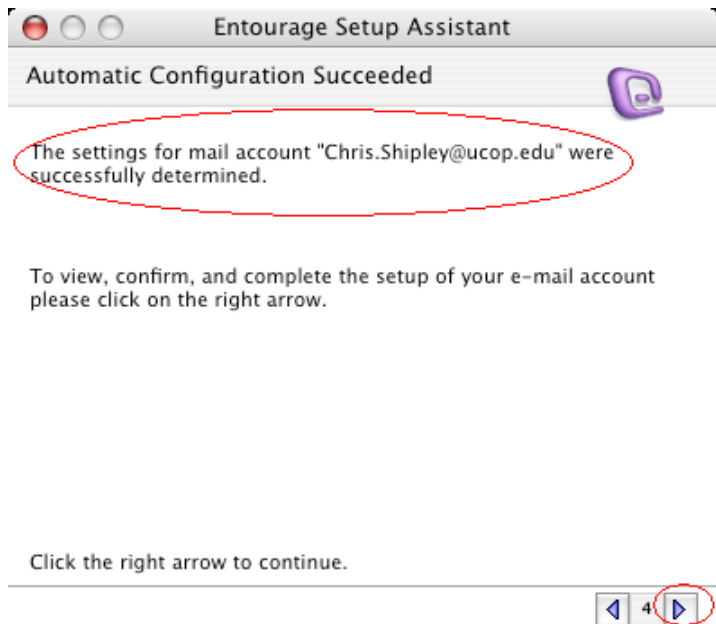
*Note: If you wanting to import your Eudora emails and contacts please reference Migrating from Eudora to Entourage document.*



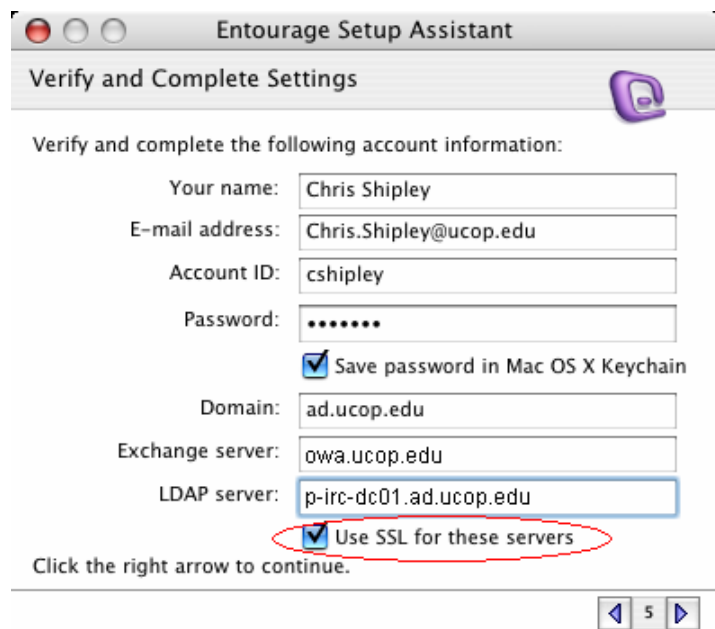
- 3) Enter your UCOP email address information.
- Make sure to select the option “My Account is on an Exchange Server”.
  - Email address: first.lastname@ucop.edu
  - User ID: first initial, last name (ex: cshipley)  
or, first initial and the first 7 letters of last name
  - Domain: ad.ucop.edu
  - Password: \*\*\*\*\*
  - click right arrow to continue.



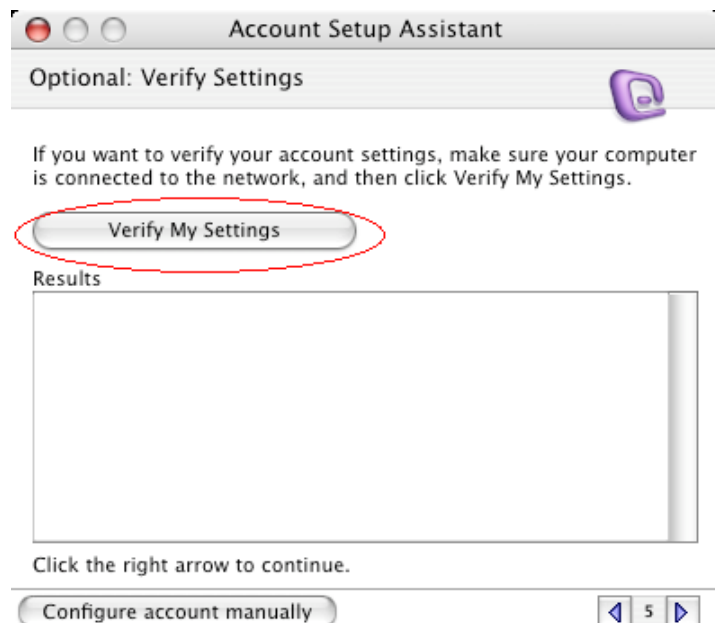
- 4) Finishing the Setup with Setup Assistant, if everything is set correctly you will receive the below screen, indicating the settings were “successfully determine”.
- click right arrow to continue.



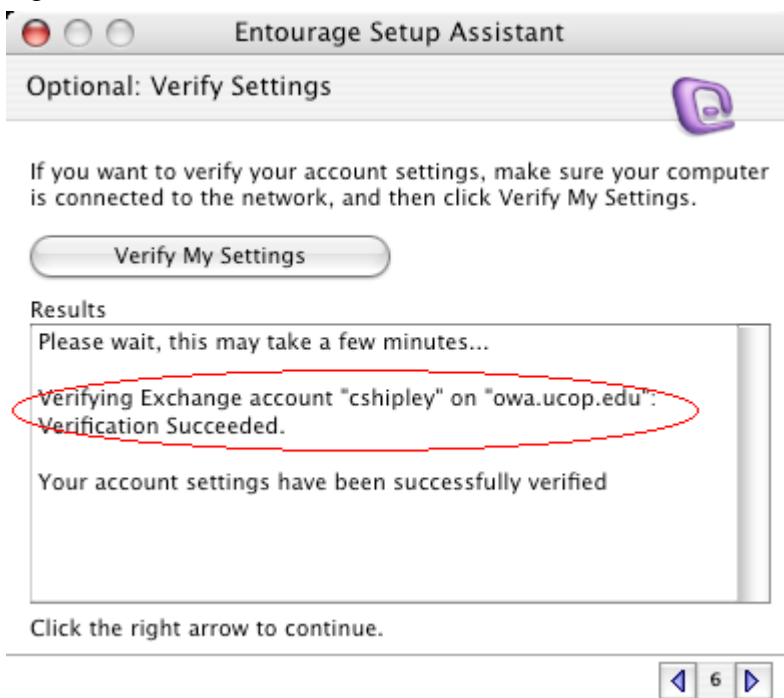
- 5) Checking the settings for access to UCOP exchange.
  - Email address: [first.lastname@ucop.edu](mailto:first.lastname@ucop.edu)
  - Account ID: first initial, last name (ex:cshipley)  
or, first initial and the first 7 letters of last name
  - Password: \*\*\*\*\*
  - Domain: ad.ucop.edu
  - Exchange Server: owa.ucop.edu
  - LDAP Server: p-irc-dc01.ad.ucop.edu (The old server irc-nts31.ad.ucop.edu will be taken offline in the future, approx date 8.18.2006). You can also use LDAP servers below:  
p-irc-dc02.ad.ucop.edu  
p-irc-dc03.ad.ucop.edu
  - Select option to “Use SSL for these servers”



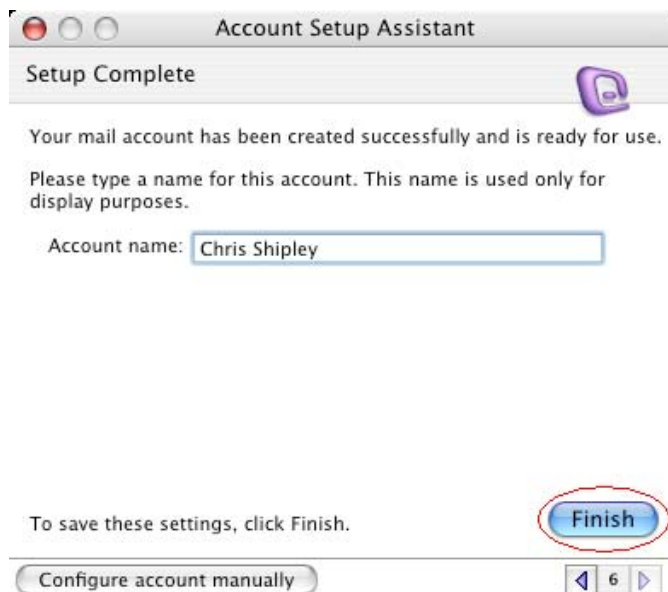
- 6) Verifying the Settings
  - Select option to “Verify My Settings”



7) Confirmation the settings are verified.



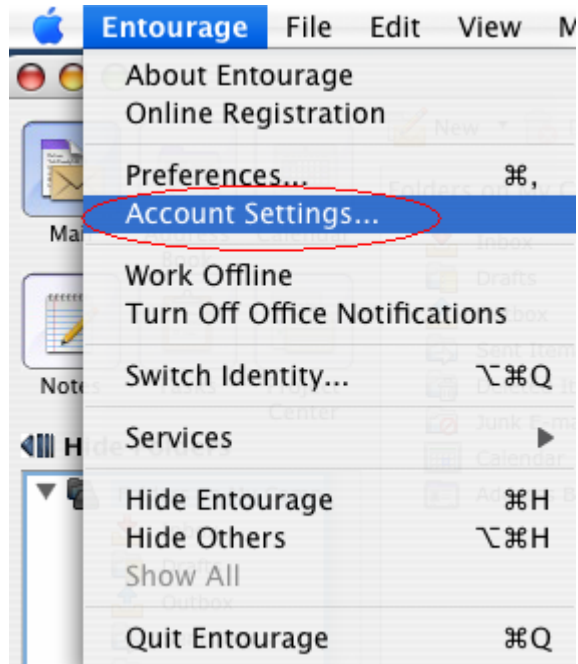
8) Naming the account. Give the account settings a name, maybe easier to name the account settings the user's name, first and last name. When done, select Finish and you are set up to begin using Entourage 2004.



### Setting up Entourage Manually

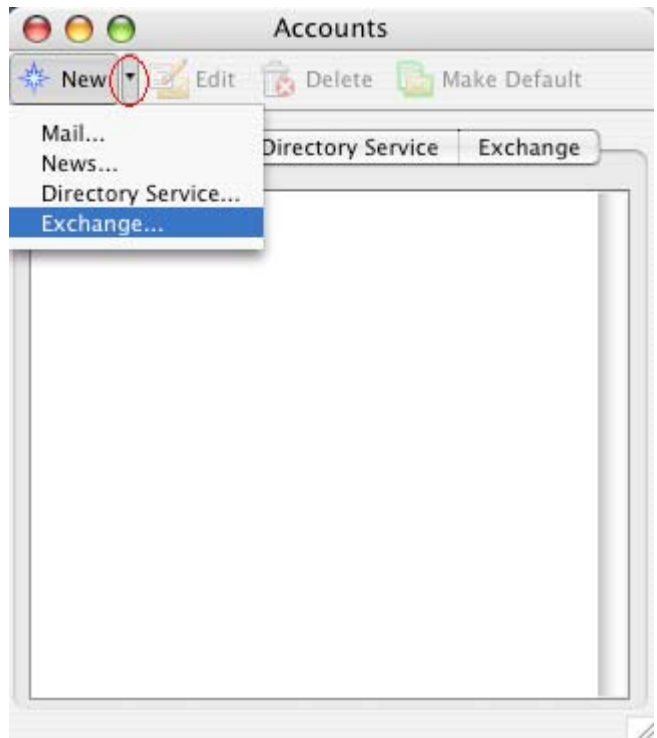
Skipping the Setup Assistant or if the Entourage application has been launched and the setup wizard has already been ran or skipped.

10) With Entourage open, go to Entourage and select “Account Settings”

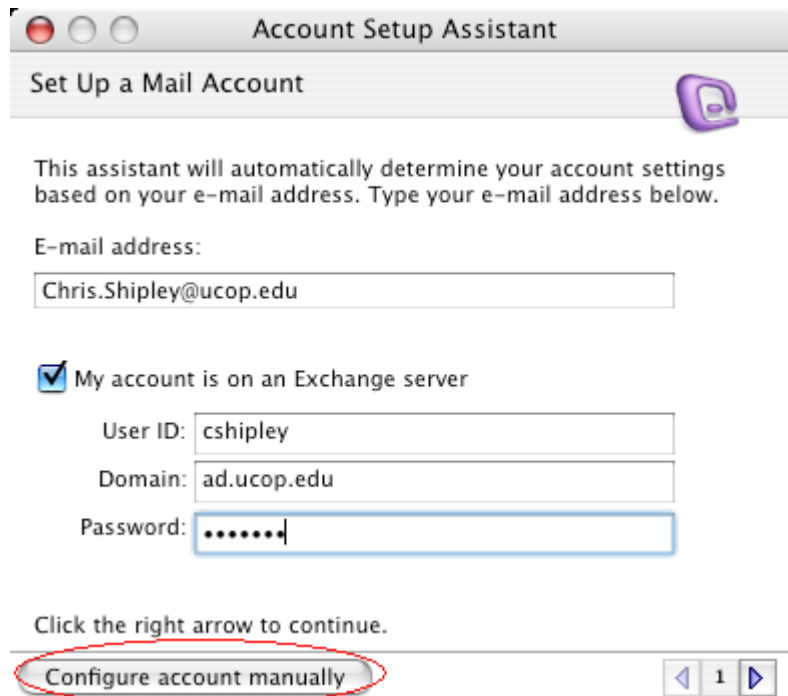


11) The Account Settings screen will appear, you will need to create a new setup

- Click the **down arrow** next to New and select **Exchange...**



- 12) Enter your UCOP email address information,
- Same as Step #3 (Using the Setup Assistant)
  - Make sure to select the option "My Account is on an Exchange Server".
  - Email address: first.lastname@ucop.edu
  - User ID: first initial, last name (ex: cshipley)  
` or, first initial and the first 7 letters of last name
  - Domain: ad.ucop.edu
  - Password: \*\*\*\*\*
  - click option to "Configure Account Manually"



Below is the information needed to manually setup Entourage.

***Setting up the account information under the “Account Settings” Tab***

- Account Name: Enter the user’s first and last name
- Email Address: [first.lastname@ucop.edu](mailto:first.lastname@ucop.edu) (ex: Chris.Shipley@ucop.edu)
- Account ID: first initial last name  
or, first initial and the first 7 letters of last name
- Domain: ad.ucop.edu
- Password: \*\*\*\*\* (please call or email pchelp to reset passwords)
- Exchange Server: owa.ucop.edu

The screenshot shows the 'Edit Account' dialog box with the following fields and options:

- Account name:** Chris Shipley
- Personal information:**
  - Name: Chris Shipley
  - E-mail address: Chris.Shipley@ucop.edu
- Server information:**
  - Account ID: cshipley
  - Domain: ad.ucop.edu
  - Password: \*\*\*\*\*
  - Save password in my Mac OS keychain
  - Exchange server: owa.ucop.edu
- This DAV service requires a secure connection (SSL)
- Override default DAV port: 443

At the bottom of the dialog box, there are 'Cancel' and 'OK' buttons.

13) Account settings for Public Folder and LDAP settings,

*under the “Advanced” Tab.*

- Public folder server: owa.ucop.edu/public/
  - Checkmark option for “This DAV service requires a secure connection (SSL)”
- LDAP Server: p-irc-dc01.ad.ucop.edu (The old server irc-nts31.ad.ucop.edu will be taken offline in the future, approx date 8.18.2006). You can also use LDAP servers below:
  - p-irc-dc02.ad.ucop.edu
  - p-irc-dc03.ad.ucop.edu
- Select option of “This server requires me to log on”.

The screenshot shows the 'Edit Account' dialog box with the 'Advanced' tab selected. The 'Public Folder Settings' section is circled in red, showing the 'Public folders server' field with the value 'owa.ucop.edu/public'. Below this, there is a note 'This server is also used for free/busy information.' and a checked checkbox for 'This DAV service requires a secure connection (SSL)'. There is also an unchecked checkbox for 'Override default DAV port:' with the value '443'. The 'Directory Settings' section is also circled in red, showing the 'LDAP server' field with the value 'p-irc-dc01.ad.ucop.edu'. Below this, there is a checked checkbox for 'This server requires me to log on', an unchecked checkbox for 'This LDAP server requires a secure connection (SSL)', and an unchecked checkbox for 'Override default LDAP port:' with the value '3268'. At the bottom of the dialog, there are 'Cancel' and 'OK' buttons.

### Using Entourage Offsite requires VPN

# VPN



VPNClient

To use the Entourage client offsite, the client needs to be configured to access the UCOP exchange system.

It is recommended if you work offsite that the Cisco VPN client be installed for security and full functionality of the Entourage client. You will be able to send and receive emails without VPN, this is secured email using https, however if you need to look up names in the GAL, “Check Names”, this functionality will require VPN.

If you need assistance installing VPN, please contact [pchelp@ucop.edu](mailto:pchelp@ucop.edu) for instructions or visit the UCOP website, <http://www.ucop.edu/irc/services/vpnfaq.html>.

### Installing Class 3 Secure Certificate

Once you have the settings in Entourage, if you will get the below screen about establishing a secure connection to the UCOP exchange system. The following steps will help guide you in downloading and installing the secure certificate needed for secure access for both Entourage and OWA (<http://owa.ucop.edu>). *Note: this is not a requirement.*



Step 1) To download the Class 3 Secure Certificate, open a web browser, we recommend using Safari. Once the certificate is installed, the user can use any web browser they prefer, but for the initial install, we recommend using Safari.

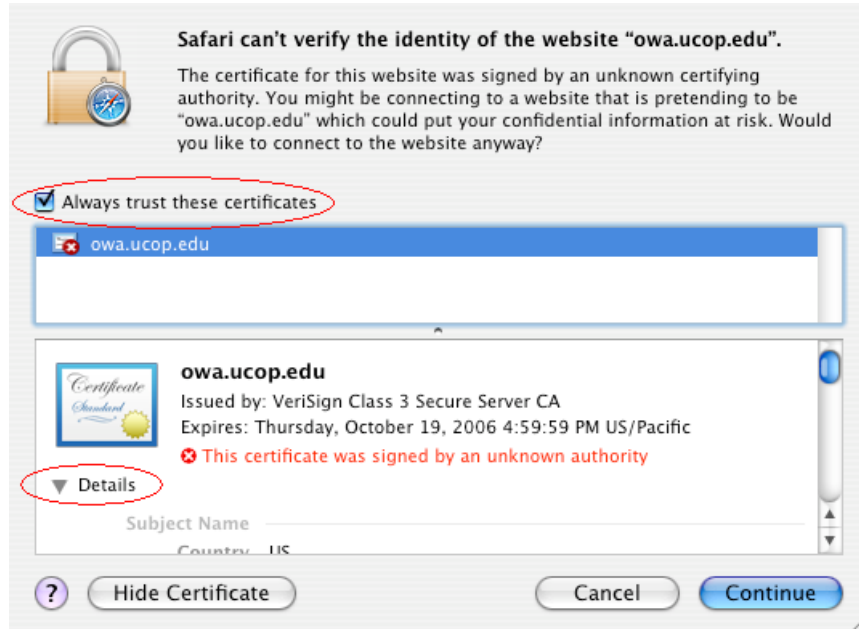
With the Safari web browser open, go to <http://owa.ucop.edu>

You will see the below pop-up window.

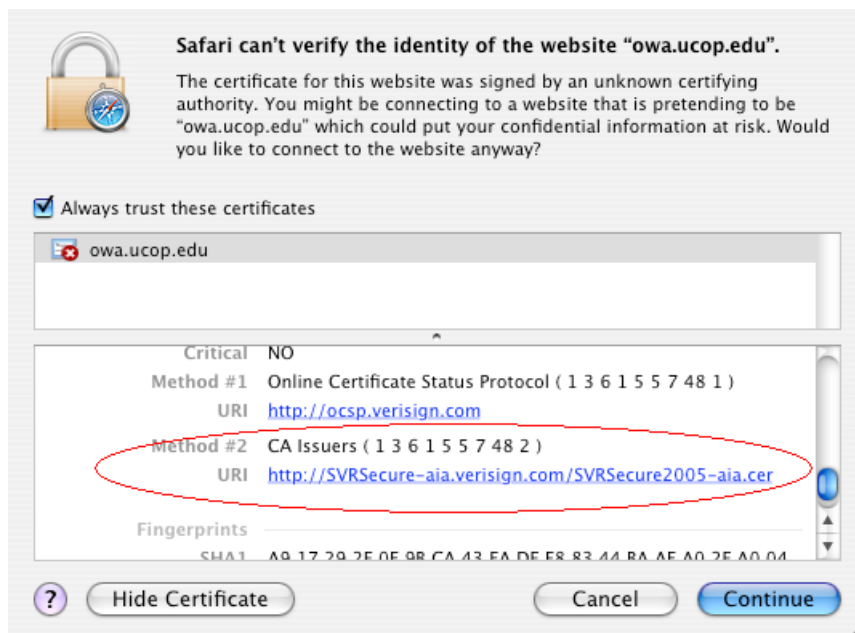
Select the option to “Show Certificate”



Step 2) With the “Show Certificate” selected, you will see the below screen.  
Select the option to “Always trust these certificates”  
Click the arrow to the left of “Details”



Step 3) With the details showing, scroll down towards the bottom of the information, there will be the certificate files listed, double click the file for CA Issuers  
URI <http://SVRSecure-aia.verisign.com/SVRSecure2005-aia.cer>  
Note: the file will now begin to download



Step 4) The file will download to your “Desktop” of default download location for Safari, if you cannot find the filename SVRSecure2005-aia.cer on your desktop, open Safari, go to Preferences and locate General Preferences, the download location is listed next to “Save downloaded files to:” This will be the location of the downloaded certificate.



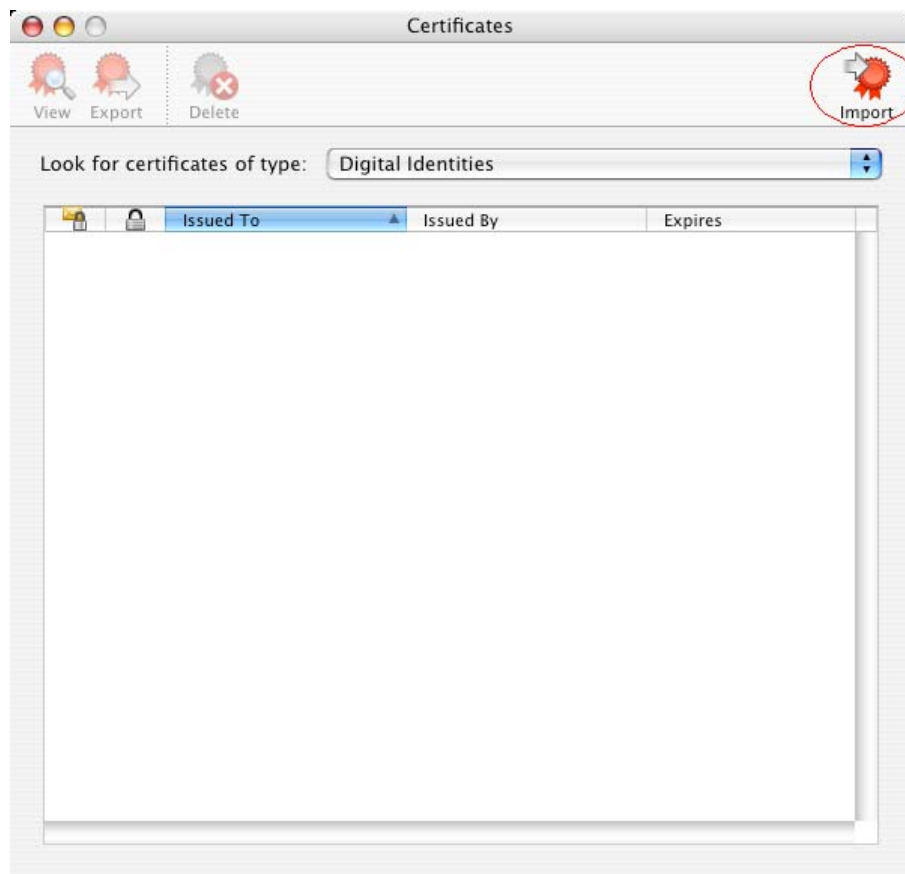
Once the certificate is downloaded and located, you can now “Quit” Safari.

Step 5) With the certificate downloaded, we need to install the certificate into the Microsoft Cert Manager. This utility is located in the Microsoft Office 2004 application folder (\Applications\Microsoft Office 2004\Office\Microsoft Cert Manager).

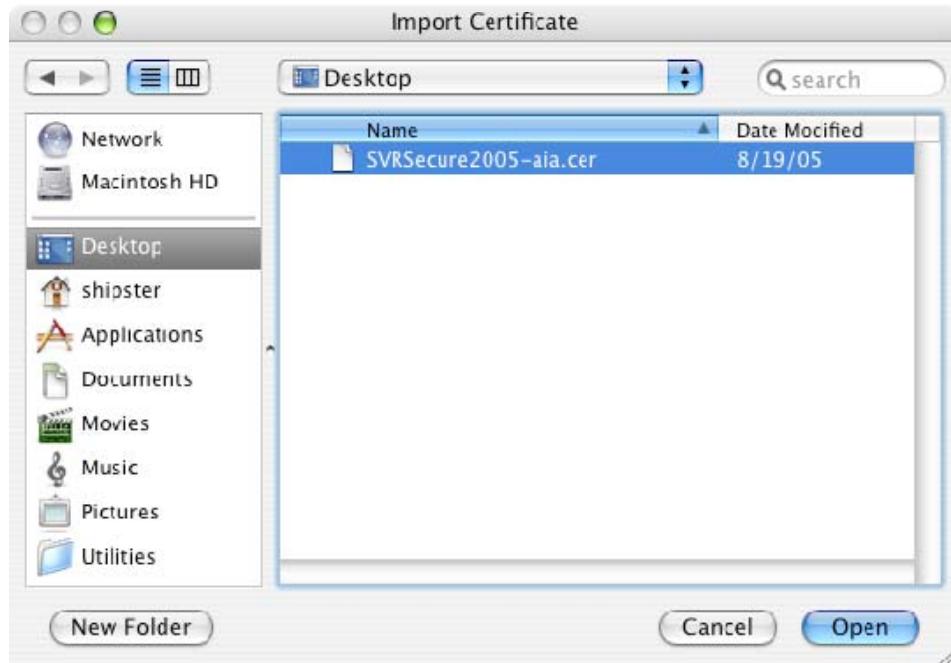


Microsoft Cert Manager

Step 6) With Microsoft Cert Manager launched, select the option to “Import” from the top right corner.



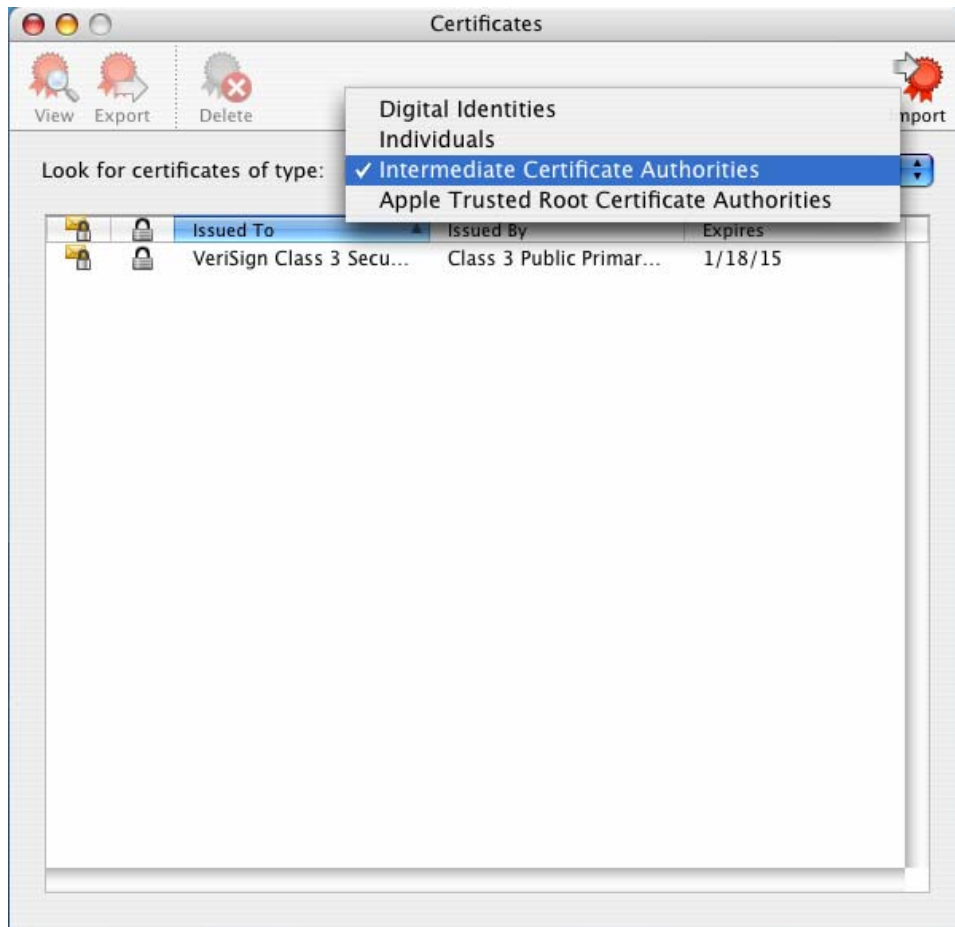
Step 7) Select the downloaded certificate from Step #3 above, depending upon download location discussed in Step #4. In this example the certificate was downloaded to the “Desktop”.



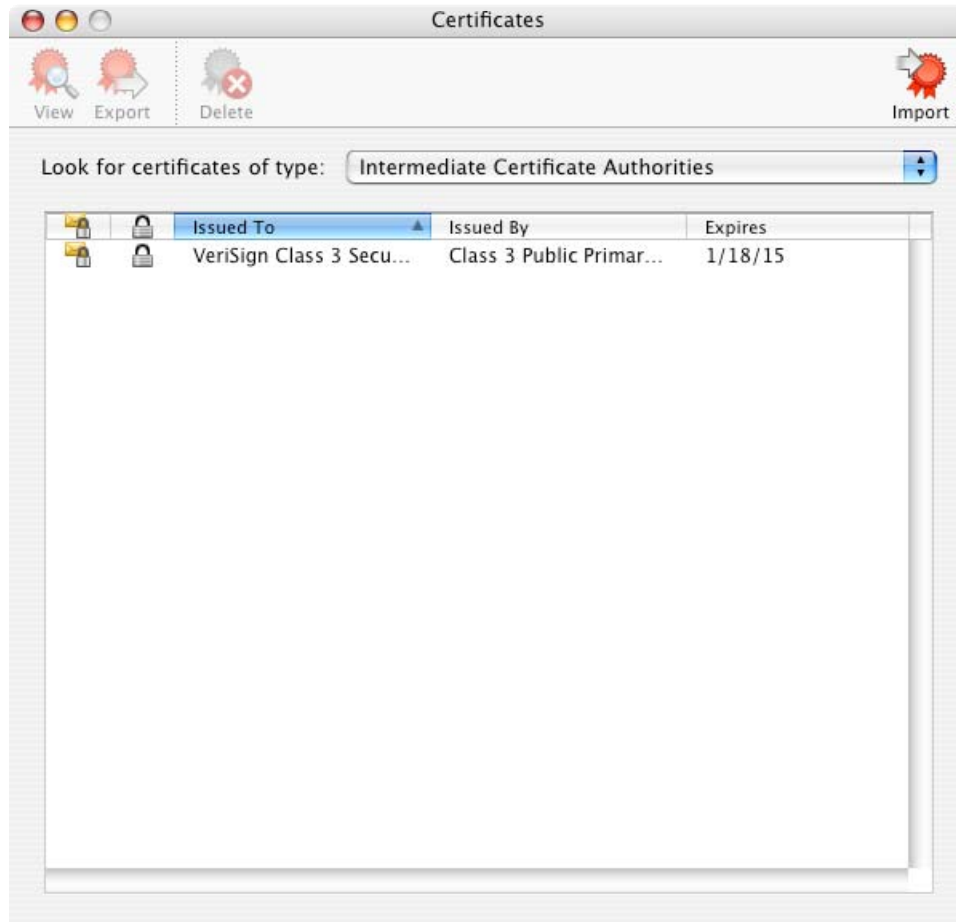
Step 8) Once the certificate is installed correctly, you will receive the below dialog box, select OK.



Step 9) Now the certificate is installed, we can view the information pertaining to this certificate. With Microsoft Cert Manager open, select the drop down menu “Look for certificates of type:”, and select the option for “Intermediate Certificate Authorities”.



Step 10) With the option “Intermediate Certificate Authorities” selected, you will see the certificate “Verisign Class 3 Secure Server CA”. You have completed the installation of the security certificate needed for secure connection (https/ssl) to the UCOP exchange system.



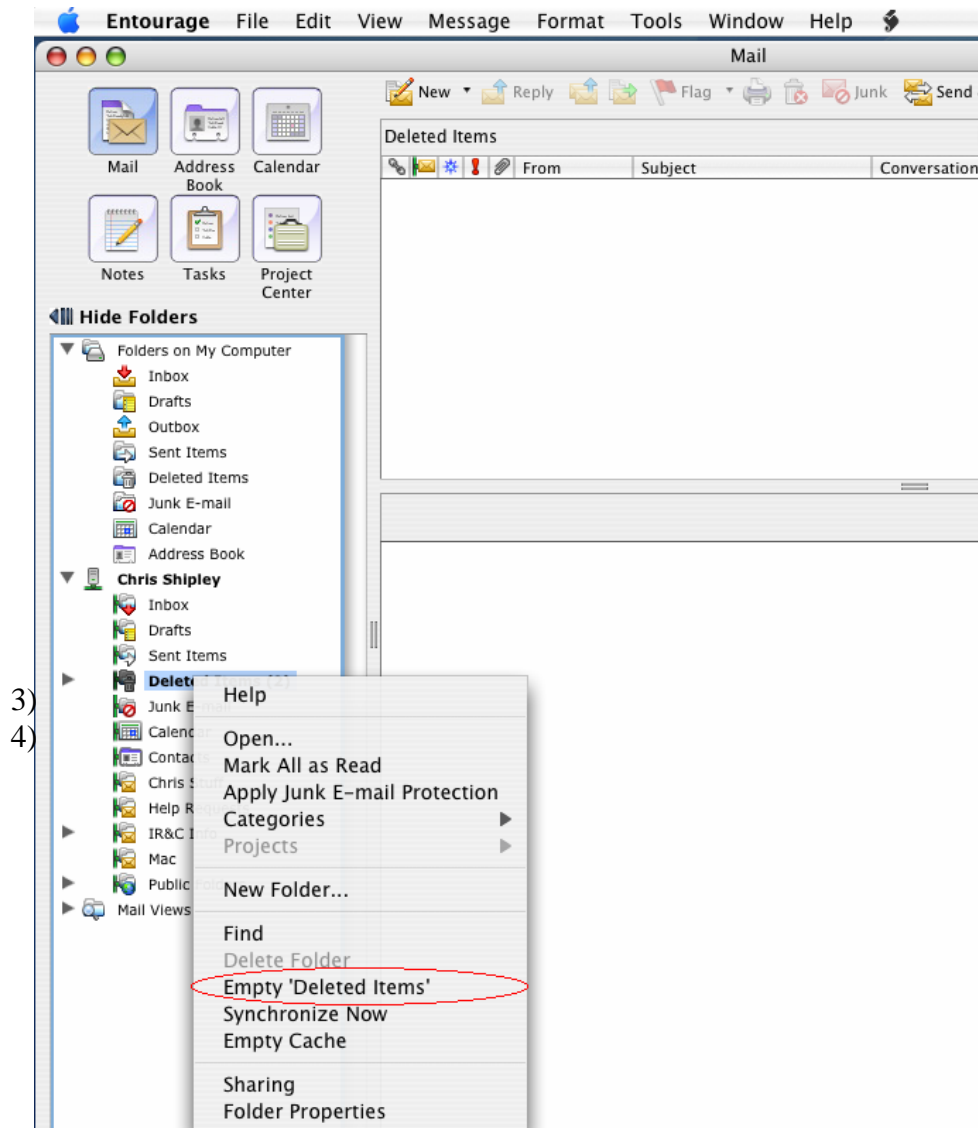
Now with the certificate installed you can now access <http://owa.ucop.edu> and use the Entourage client to access your ucop.edu email, without the annoying pop-up screens. Also other browsers, such as Firefox and Internet Explorer can now use <http://owa.ucop.edu> as well without the pop-up screens warning about the security certificate.

## Emptying Deleted Items in Entourage

If you are using Entourage throughout the day to send and receive messages or update your calendar you may want to clean up your space as you work.



- 1) From the *Navigation* pane, select **MAIL**
- 2) In the *Folder* list, press **[control]** and click the **DELETED ITEMS** folder  
A *Quick* menu appears, From the *Quick* menu, select '*Empty Deleted Items*'



3) A confirmation dialog box appears, Click **EMPTY**. Note: You may want to select the option “Don’t show this message again”, once selected, when emptying your “deleted items” folder this dialogue box will disappear.



## Entourage 2004 - Archiving Information

### About Archiving

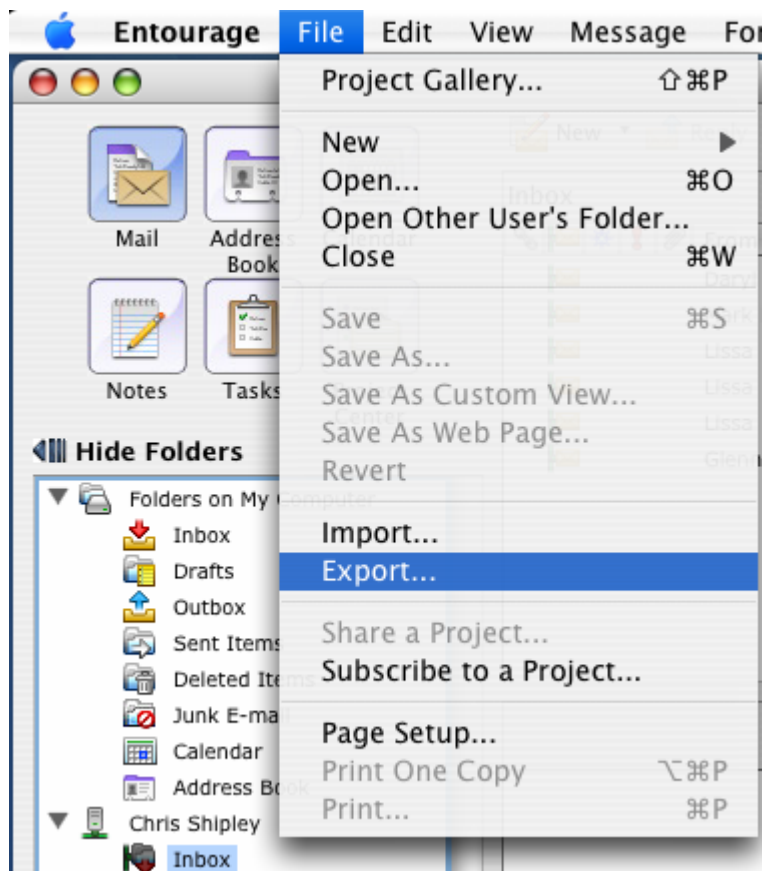
You can export items such as mail messages, tasks, contacts, notes, and calendar events from Entourage into an archive file (.rge extension). This allows you to store information in another location and remove it from Entourage or to make a back up of your Entourage information without removing it.

Important: When making back ups and archives, keep the following in mind:

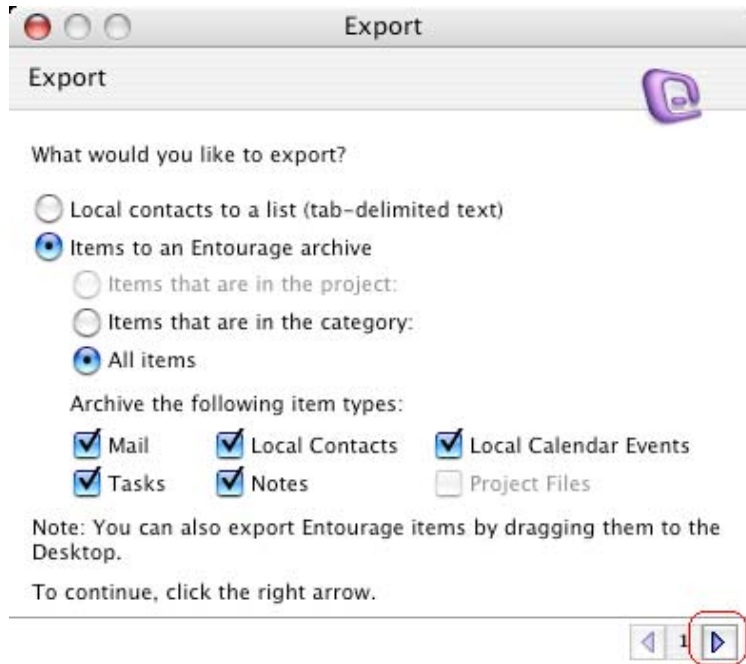
- Groups, notes with multimedia elements and category information for all items except contacts **CANNOT** be exported.
- When exporting messages stored on a mail server, the entire contents of the message can only be exported if it has been downloaded from the mail server.
- Even if you delete items after exporting, messages stored on the mail server will **NOT** be deleted.

### Archive or Back up Entourage information

1. Empty all Deleted Items folders to avoid getting items you do not want. (CLICK HERE)
2. On the **File** menu, click **Export**.



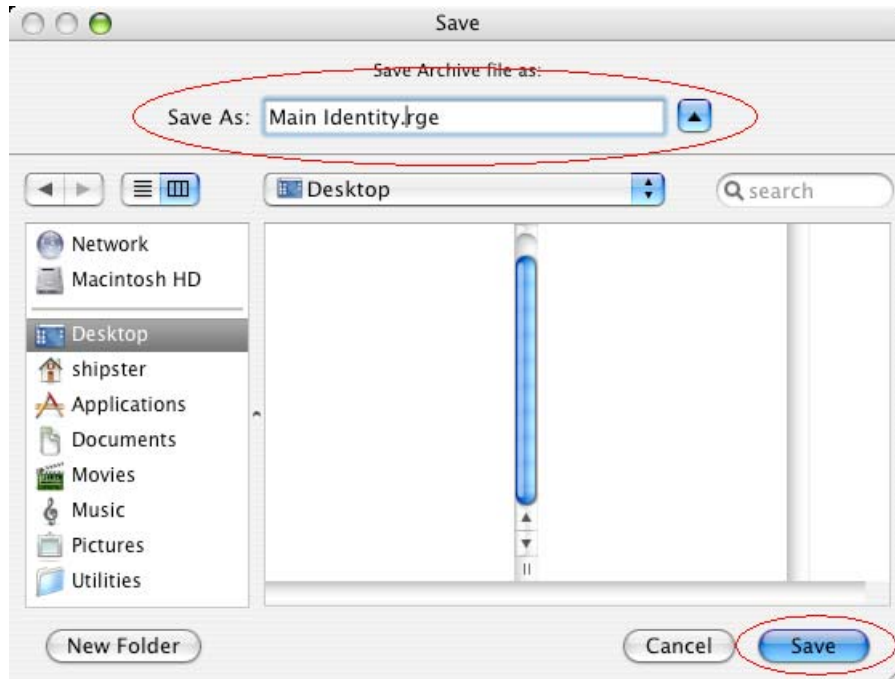
- 3) Click **Export items to an Entourage archive** and select the items that you want to include. Under **Archive the following item types**, select the types of items that you want to include and then click the right arrow to continue. Click right arrow to continue



- 4) Choose whether or not you want to delete the items that you are exporting and then click the right arrow to continue.



- 5) Enter a name, default is Main Identity.rge, however you may enter anything for the filename, for the archive file and a location (ex: Desktop) to store it and then click **Save**.  
*Note: Click the blue arrow to the right of the filename field to extend to column view, as seen below.*



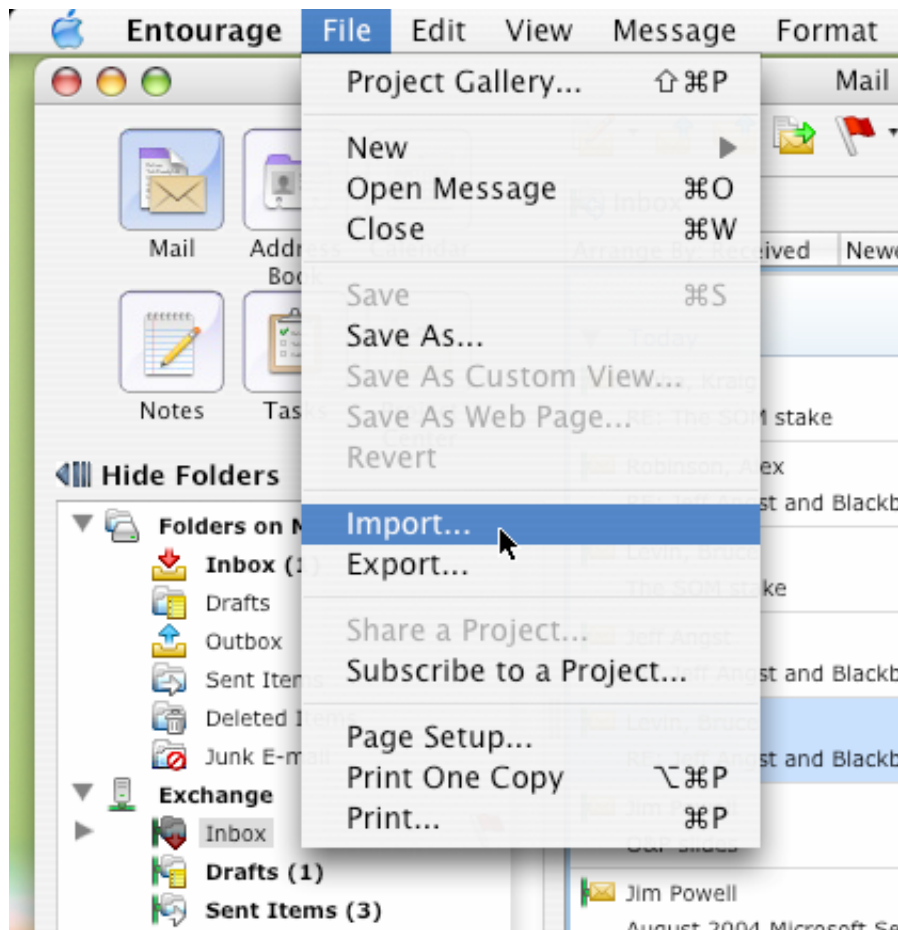
- 6) Once complete you will receive confirmation that the export has finished. Select Done.



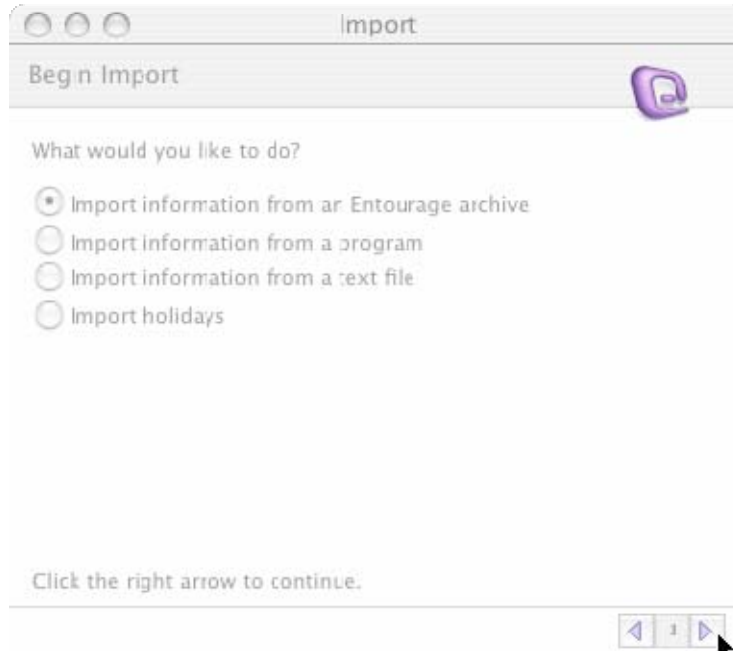
Done

## Restore Entourage information from exported archive file (.rge)

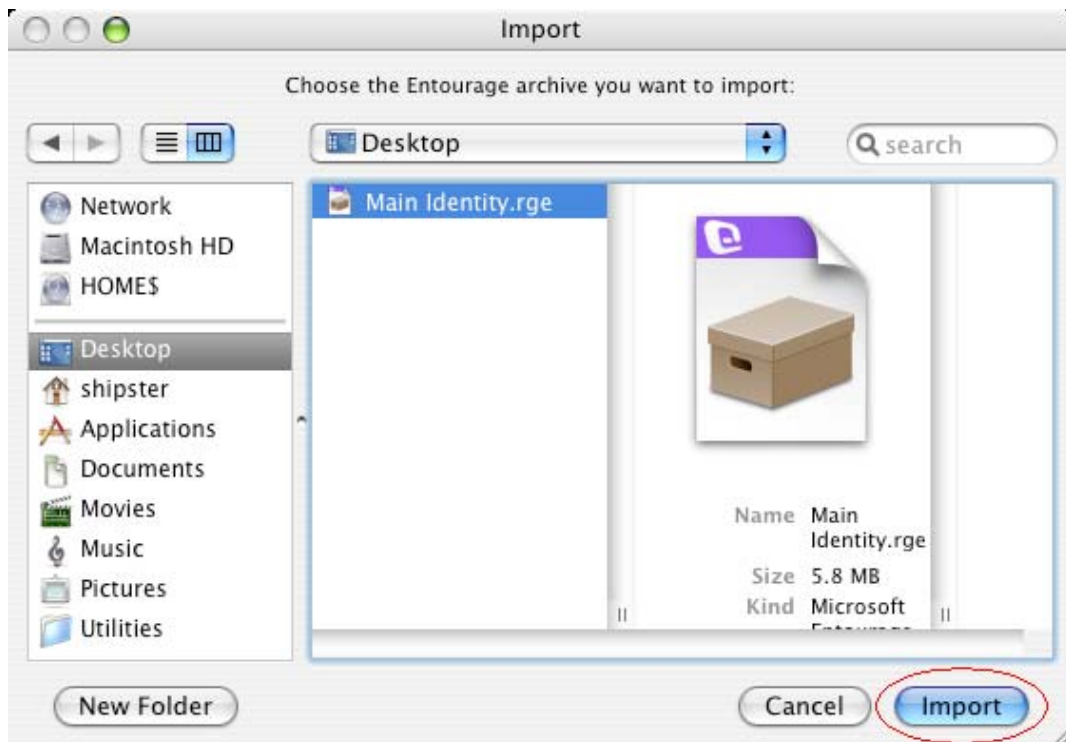
- 1) On the **File** menu, click **Import**.



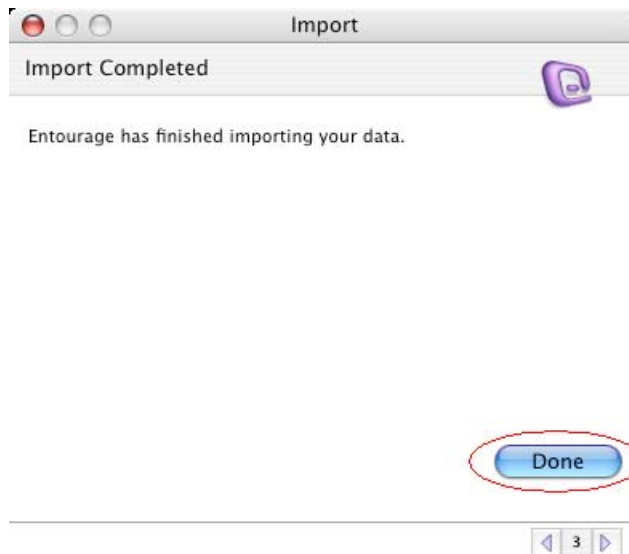
- 2) Click **Import information from an Entourage archive** and then click the right arrow to continue.



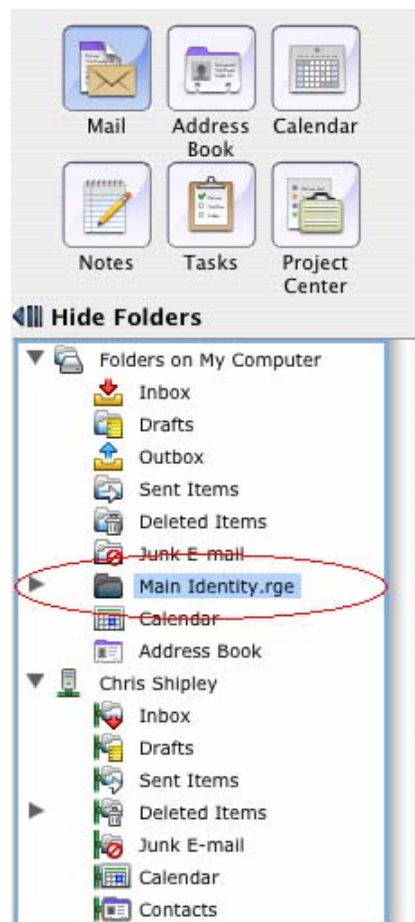
- 3) Locate the .rge folder that you want to import and then click **Import**. In this example, in step #5 under archiving (CLICK HERE), the file was exported to the Desktop. Once the .rge file is selected, click Import.



- 5) Once complete you will receive confirmation that the export has finished. Select Done.

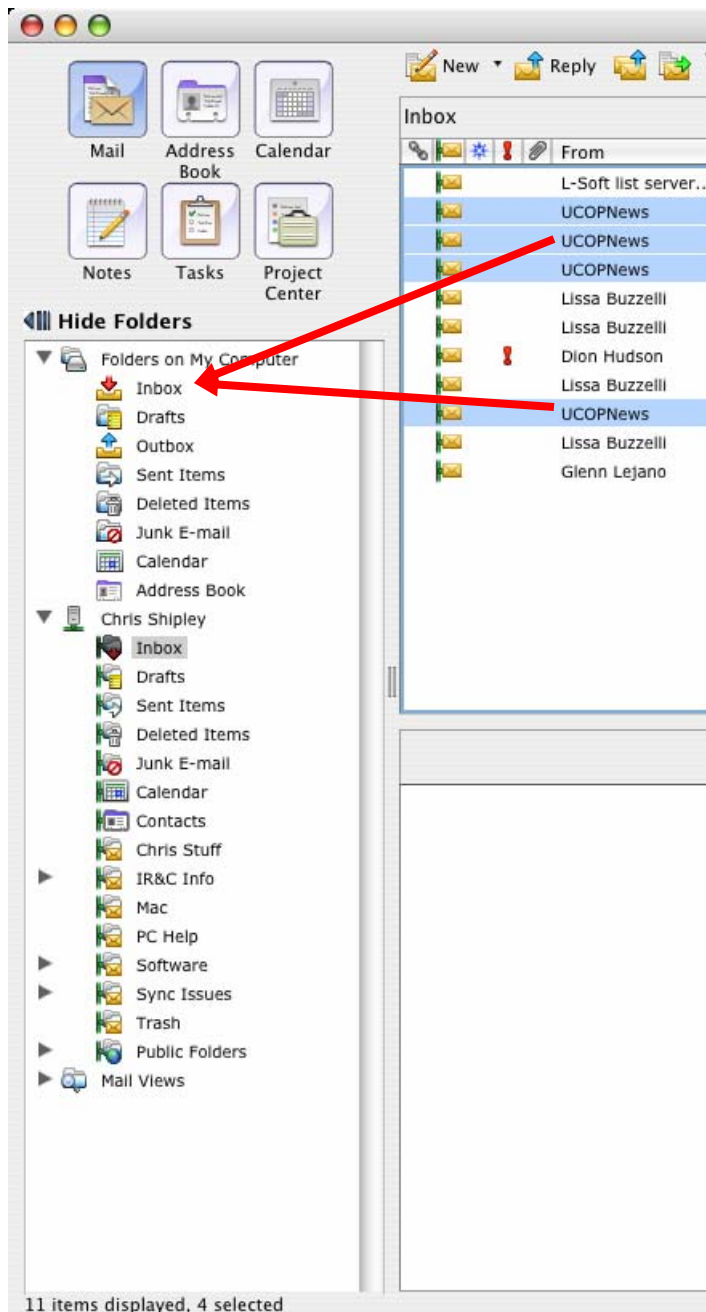


- 5) Once complete you will see the imported folder in your personal archive folder (Folders on My Computer), see screen shot to the right.

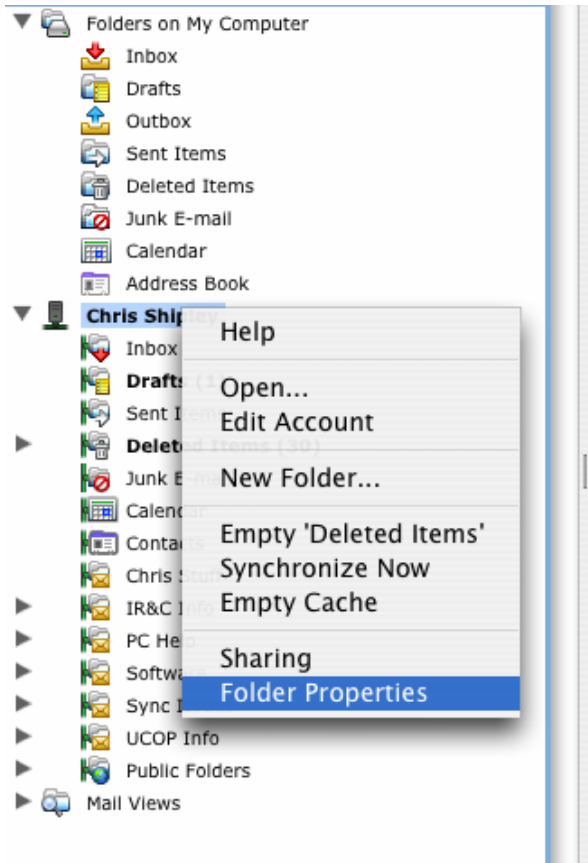


### Manually Archiving using drag & drop

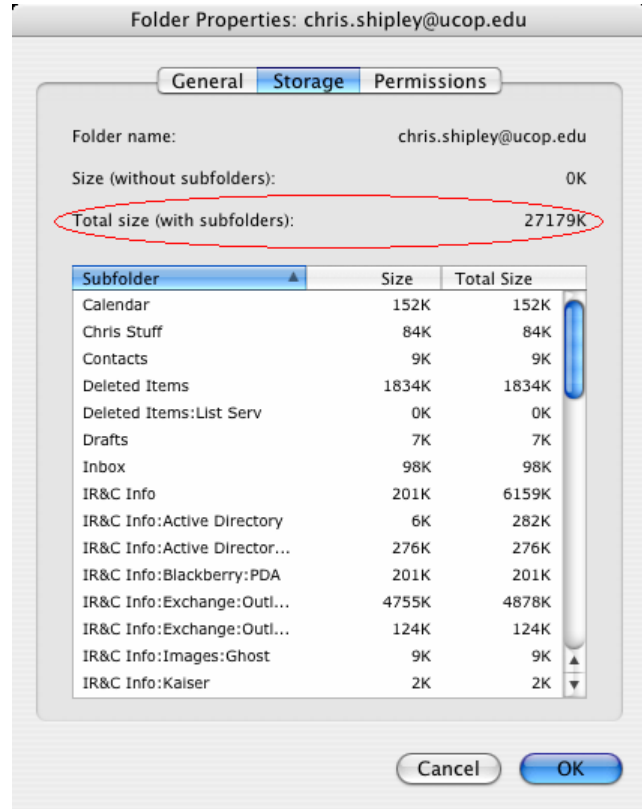
**This method can be used for immediate or as the process for archiving emails to the local archive file (.rge). This process is just a drag and drop approach. Select the emails you would like to archive, to select multiple messages, hold down the Apple Key or ⌘ key and select the individual messages you are needing to archive. Once selected drag and drop the messages into “Folders on My Computer”. In this example we are moving emails from our exchange Inbox (emails labeled UCOPNews) over to a local archive file (.rge), Folders on My Computer Inbox. Note: You can create additional folders for organization in your local archive file.**



### Checking your Exchange Mailbox Folder Size



With Entourage open, select your exchange mailbox, right click and choose Properties, then select the Storage Tab, give it a moment to calculate all folder sizes and also the Total Size (circled in Red). The default mailbox quota size is 150Mb or 150000K. If you notice your mailbox sizes is over or near the quota size, please archive.



## Sharing your Inbox and/or Calendar in Entourage

This part of the documentation, is for sharing out your exchange mailboxes or calendar for viewing by other UCOP employees. Entourage supports the sharing and adding of additional mailboxes just the same as Outlook does on the windows platform. However the settings in the advanced tab must be set, otherwise the calendar free/busy information will not be available when scheduling events, etc. Also the LDAP server settings need to be specified for Global Address List (GAL) lookups for other employees, groups, etc.

### Public Folder Settings:

The Public folder server needs to be set as: **owa.ucop.edu/public**  
Also, make sure **SSL is checked** as well.

### Directory Settings

LDAP Server:

**p-irc-dc01.ad.ucop.edu**

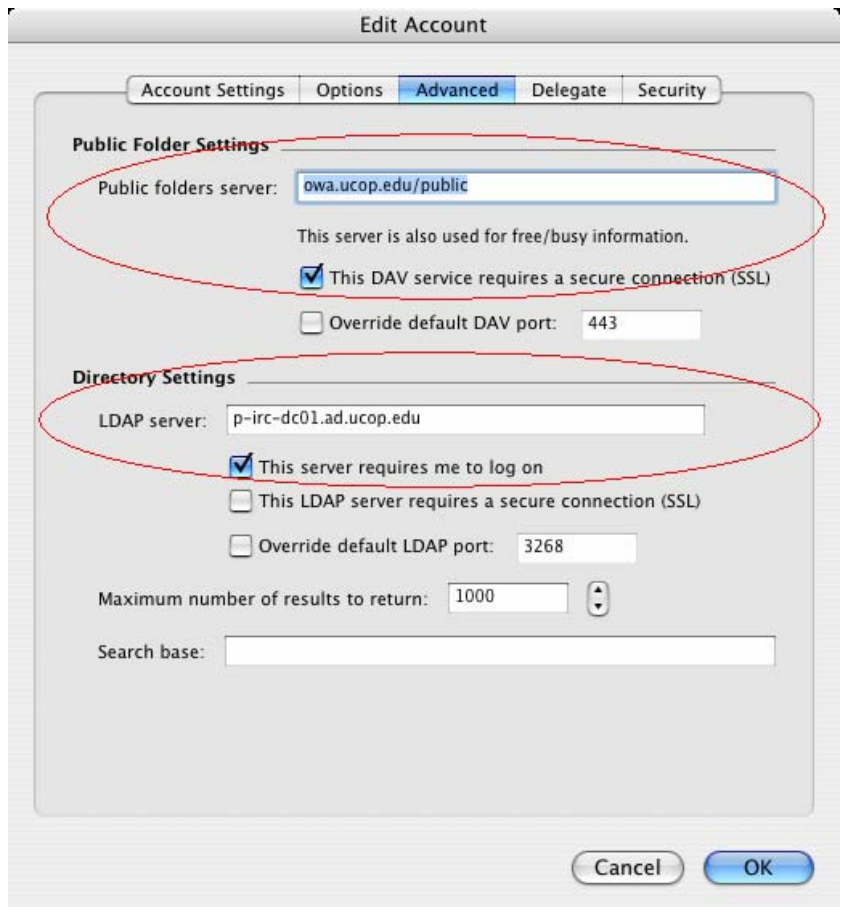
(Note: the previous documentation set the ldap server as *irc-nts31.ad.ucop.edu*; this server will be taken offline in the future)

Also can use these below as well:

p-irc-dc02.ad.ucop.edu

p-irc-dc03.ad.ucop.edu

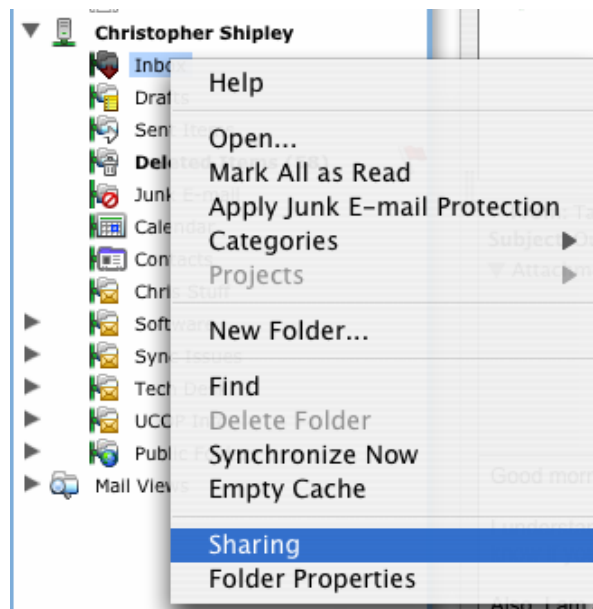
Also, make “**This server requires me to log on**” is checked.



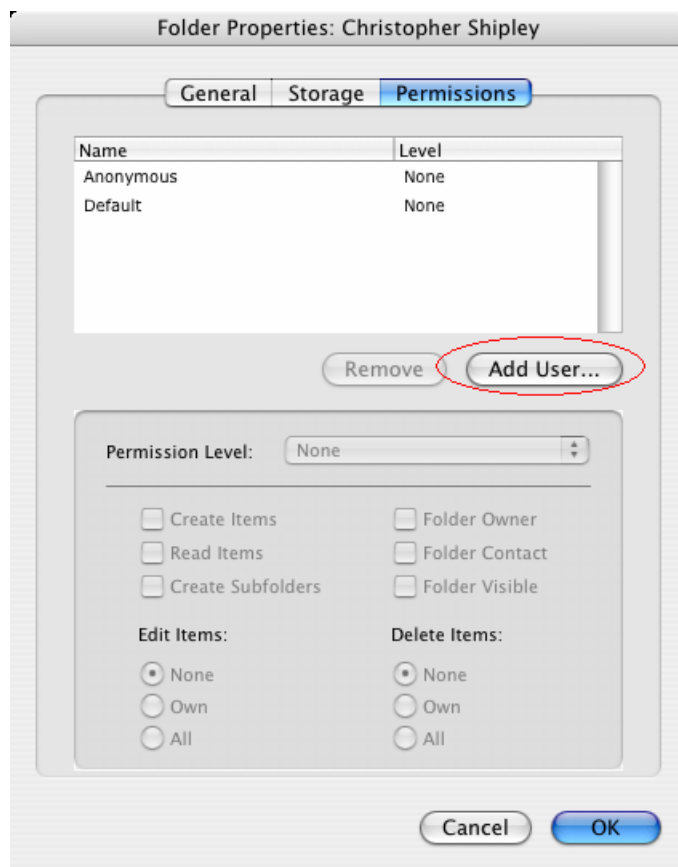
Once these settings are in place, you will be able to view other UCOP employees' calendar free/busy information as well as search the GAL (Global Address List) for other users and groups.

The next few steps will be showing you how to share your “inbox” and “calendar”, however you may share any mailbox, contacts, tasks, etc.

**Step 1)** In Entourage, **Ctrl + click** your “Inbox” folder and choose “**Sharing**”. (Note: Ctrl = control key).



**Step 2)** Next you will get the Folder Properties window, make sure the Permission tab is active and select **Add User**.

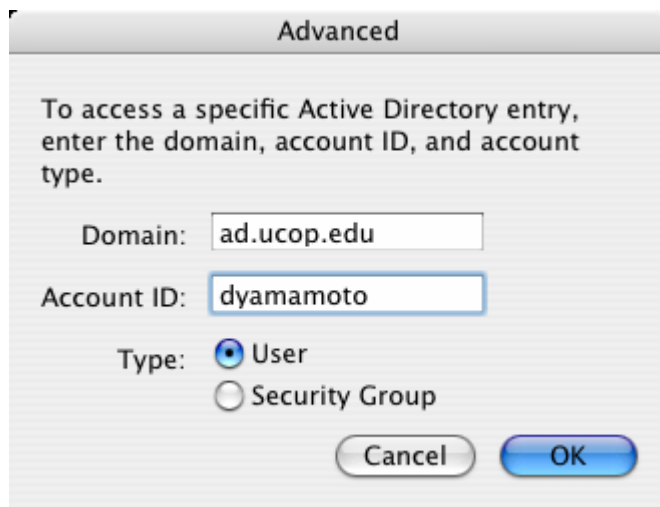


**Step 3)** Next will be the select user screen, select the option of **Advanced** in bottom right corner.



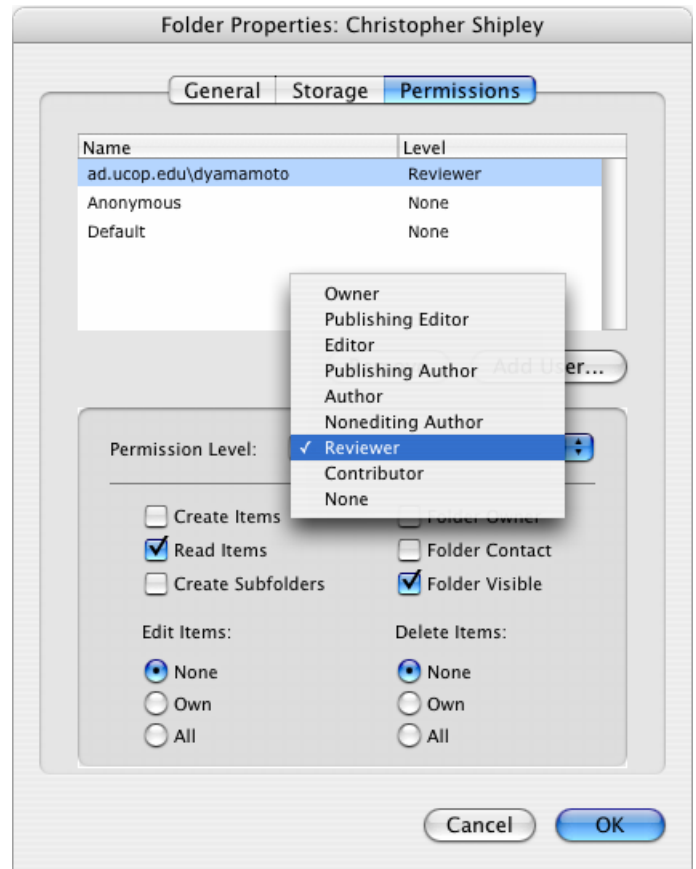
**Step 4)** Next in the Advanced window type in the UCOP domain (**ad.ucop.edu**) and the **Account ID** of the user you are wanting to share your inbox with. (Note: the account ID is First Name Initial, first 7 characters of last name, total 8 characters). Select what type, User or a Security Group. Select **OK**.

*(Note: You can add more than one user or group into your sharing, just select Advanced again, and add the additional user(s) or groups.)*

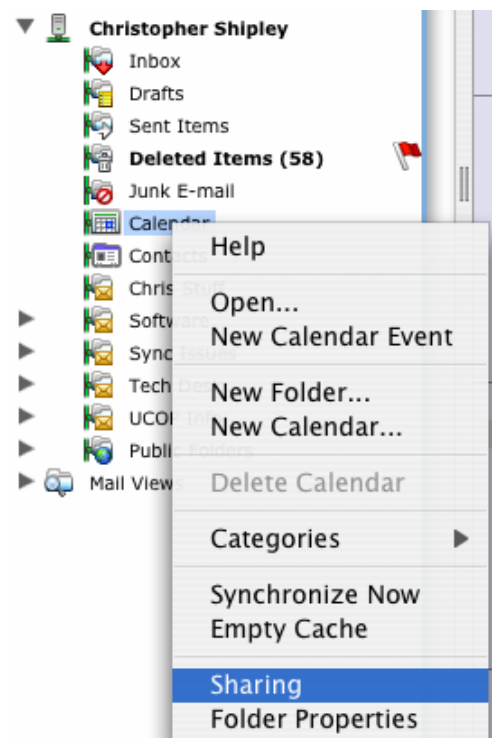


**Step 5)** Next, select the permission you want the user to have, below is explanation of all. (*In this example I set permission for user (dyamamoto for Reviewer, with this permission set, Daryl can view my inbox).* Once permission is set for one or all users, select **OK**.

With this permission level (or role)	You can
Owner	Create, read, modify, and delete all items and files, and create subfolders. As the folder owner, you can change the permission levels others have for the folder. (Does not apply to delegates.)
Publishing Editor	Create, read, modify, and delete all items and files, and create subfolders. (Does not apply to delegates.)
Editor	Create, read, modify, and delete all items and files.
Publishing Author	Create and read items and files, create subfolders, and modify and delete items and files you create. (Does not apply to delegates.)
Author	Create and read items and files, and modify and delete items and files you create.
Contributor	Create items and files only. The contents of the folder do not appear. (Does not apply to delegates.)
Reviewer	Read items and files only.
Custom	Perform activities defined by the folder owner. (Does not apply to delegates.)
None	You have no permission. You can't open the folder.



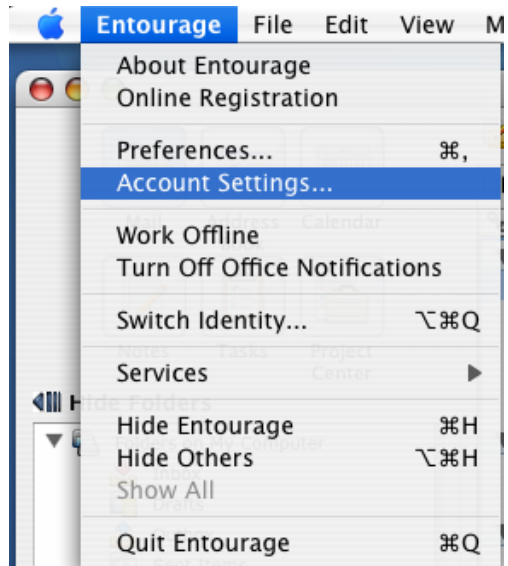
**Step 6)** You can setup sharing on your calendar as well, **Ctrl + click** your “Calendar” and choose “**Sharing**”. (Note: Ctrl = control key). *Follow the same steps from Step 2, for adding users and setting permissions.*



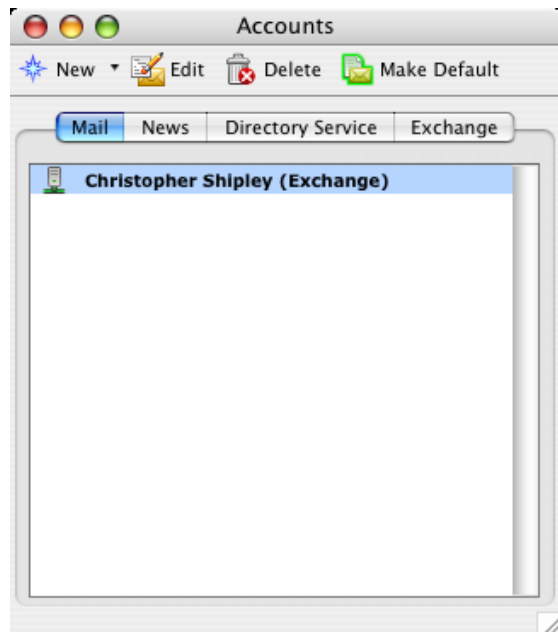
## Adding “shared” Mailboxes or Calendars to Entourage

In this part of the documentation, we will explain how to add additional “shared” mailboxes and calendars to the Entourage client. Prior to adding the additional mailboxes or calendars the permissions need to be set, also the advanced settings in the account setup need to correct for the sharing to work effectively. Please see the section prior to this “Sharing your Inbox and/or Calendar in Entourage”.

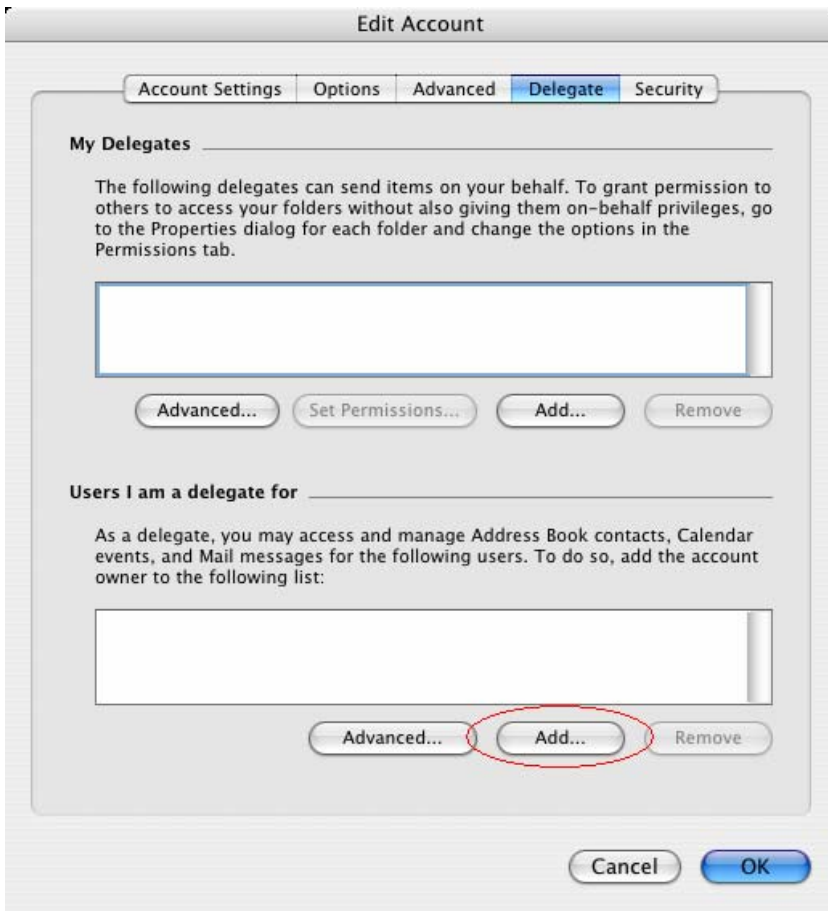
**Step 1)** In Entourage, go to **Entourage** and select **Account Settings**.



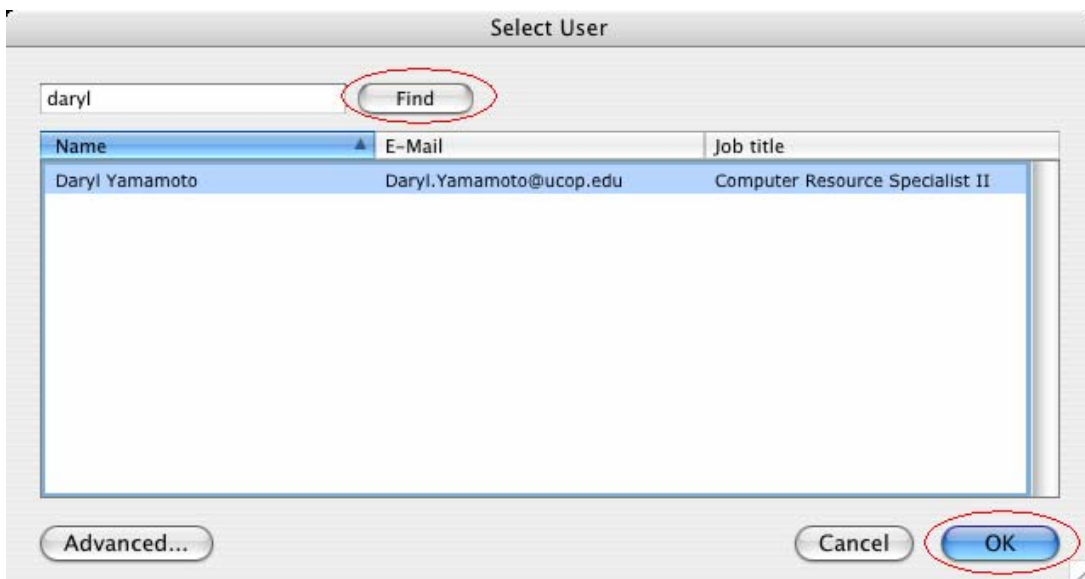
**Step 2)** Highlight your exchange account and select **Edit**, or just double click your exchange account.



Step 3) The Edit Account is screen is now open, need to select the **Delegate** tab. Then under the **“Users I am a delegate for”**, select the **“Add”** button.



**Step 4)** The select user window will appear, type in the users’ name of the shared mailbox or calendar, and select Find. Once the users name is found, highlight and select **OK**.



**Step 5)** You can also use the Advanced button in the bottom right to specify the name, email and server address.

Name: Users name (first last name)

Email address:

[firstname.lastname@ucop.edu](mailto:firstname.lastname@ucop.edu)

Server address: **owa.ucop.edu**

Make sure **SSL is enabled** (checkmark)

Once done, select **OK**.

Advanced Settings

**User's Identity**

Name: Daryl Yamamoto

E-mail Address: daryl.yamamoto@ucop.edu

**Server Options**

Server address: owa.ucop.edu

You may also enter Outlook Web Access server address, such as http://mail.example.com/exchange/

Requires a secure connection (uses SSL)

Override default port 443

Cancel OK

**Step 5a)** If Entourage is having problems connecting to the users' calendar; you can enter the full path to the users' mailbox to resolve the problem (owa.ucop.edu/exchange/firstname.lastname). Once done, select **OK**.

Advanced Settings

**User's Identity**

Name: Daryl Yamamoto

E-mail Address: daryl.yamamoto@ucop.edu

**Server Options**

Server address: owa.ucop.edu/exchange/daryl.yamamoto

You may also enter Outlook Web Access server address, such as http://mail.example.com/exchange/

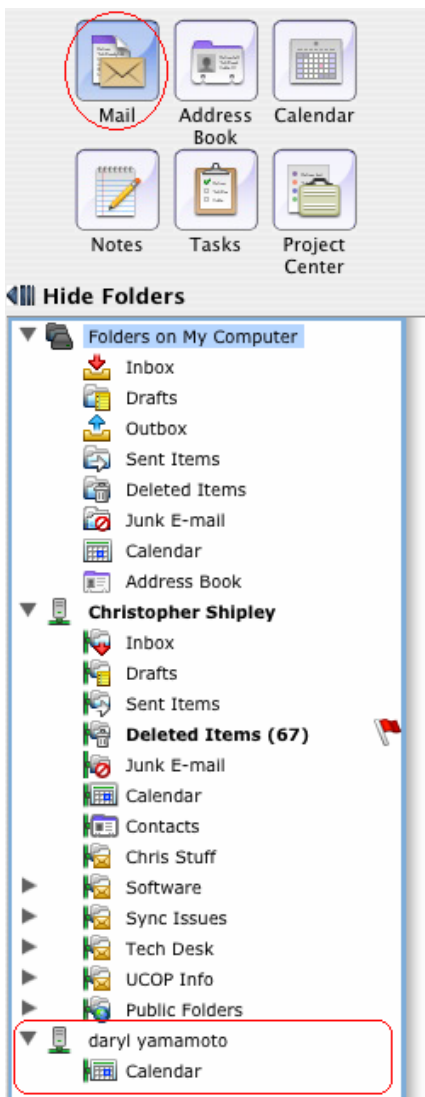
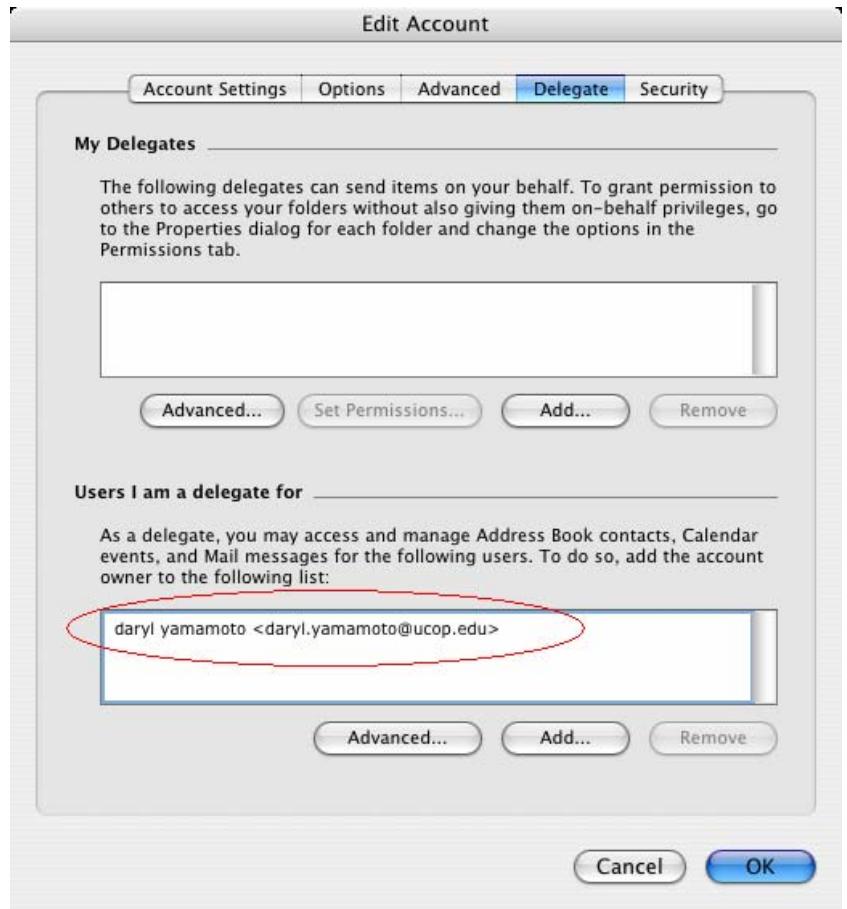
Requires a secure connection (uses SSL)

Override default port 443

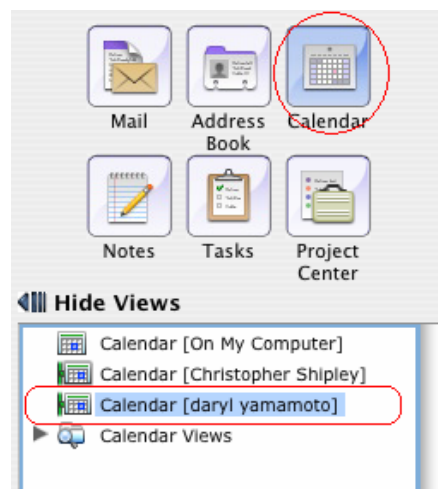
Cancel OK

**Step 7)** In the Delegate tab, you should see the users name specified in the last few steps; select OK.

**Step 8)** Back in the main Entourage window, select the **Mail icon at top**, you will now see the additional users mailbox listed (circled in Red). *Note: Depending upon the permissions set, the list of folders will vary, Inbox, Calendar, Contacts, etc.*



**Step 9)** Also if you click on the **Calendar icon at top**, you will see the additional Calendar listed. *Note: If the calendar permissions has not been given or set, the calendar will not be listed, reviewer permission is the minimal requirement.*



## Tips

- If you need to refer to information stored in an archive temporarily. Create a new identity and import the information into it. Then, when you are finished, you can simply delete the new identity.
- If you want to explore the contents of an archive, **CONTROL+click** the .rge folder and then click **Show Package Contents**.