Symprex Out-of-Office Extender

User's Guide

Version 5.1.1.

Contents

Introduction 1

Symprex Out-of-Office Extender is a small, fast, light-weight Windows service that can reset the automatic reply sender list every midnight for all or a selected set of mailboxes.

When a user enables the Outlook Out-of-Office Assistant, an out-of-office reply is only sent once to each message sender, even if the sender sends multiple messages during the entire duration of the user being away and the assistant being enabled. This is often not sufficient if the user is away for a longer time.

If, for example, a person is out of the office for two weeks and someone sends that person an email at that period, and then again a few days, the sender will not receive a second automatic reply and is now likely to be wondering why the person is not replying.

To resolve this problem Out-of-Office Extender resets the sender list for a specified set of mailboxes every midnight on selected days of the week. This means senders will get an automatic reply the first time any day they send an email to a receiver that is out of the office. This approach avoids mail loops and avoids senders getting the same out-of-office message more than once a day, but at the same time "reminds" senders that the receiver is out of the office if they send multiple emails on different days.

As a result the software can easily improve internal and external communication and can easily serve to offer better customer service.

The product does not require any changes to Outlook clients or client machines. The overhead on Exchange Server from using this product is negligible.

Before installing Out-of-Office Extender please ensure that your computer meets the minimum system requirements. In addition, once installation has been completed, some final configuration is required in order for the application to work correctly.

About Symprex

Symprex is one of the leading companies in the world for add-on solutions for Microsoft Exchange Server, Outlook and Office 365. Please see Symprex.com for more information about Symprex and the solutions we offer.

System Requirements

Symprex Out-of-Office Extender minimum system requirements are:

- Operating system software:
  Windows XP SP3 (x86 only)
  Windows Vista SP2
  Windows 7
  Windows 8
  Windows 8.1
  Windows Server 2003
  Windows Server 2003 R2
  Windows Server 2008
  Windows Server 2008 R2
  Windows Server 2012

Windows Server 2012 R2
Windows Small Business Server 2008
Windows Small Business Server 2011

- Framework software:
  .NET Framework 3.5 SP1
  .NET Framework 4.0
  .NET Framework 4.5

- System hardware:
  CPU and memory requirements for operating system
  100 MB free disk space
  1024 x 768 screen resolution

The Out-of-Office Extender 64-bit version requires Microsoft Access 2010 64-bit or Microsoft Access Database Engine 2010 Redistributable 64-bit.

Supported Exchange Server minimum versions are on-premises 2007 SP1, 2010 and 2013.

Note Client throttling must be disabled on Exchange Server 2010 and 2013 for the configured service account. Please refer to the Exchange Server Client Throttling Policies chapter for further details.

Completing Installation and Permissions Requirements

To reset the out-of-office sender list for each mailbox, Symprex Out-of-Office Extender communicates with Microsoft Exchange Server through a service running locally on the client machine. This service needs to be configured to run using a domain account that must have certain administrative permissions in the domain and on your Exchange server. This configuration should take place once the application has been installed and requires the following steps:

1. Configure a domain account for the service with the appropriate permissions.
2. Configure the service component to use the domain account.
3. Before starting the service, start the Administration tool to issue an evaluation license and, if you have a license, enter your full license.

Service Account

The Symprex Out-of-Office Extender Service has to be configured to run under a domain account (the "service account"); it is not possible to use the built-in Windows accounts (such as "Network Service"). The service account must have the appropriate permissions on Exchange Server and the settings database. The guidelines in the following sections describe how to assign those permissions.

Configuring Exchange Server Permissions

- Permissions for Exchange Server 2007
- Permissions for Exchange Server 2010 and 2013

Configuring Database Permission on Windows

Introduction   1

Permissions for Exchange Server 2007

Permissions requirements for the service account on Exchange Server 2007 are:

- **Mailbox Full Access**

To assign the service account the required permissions, follow these steps:

1. Open the **Exchange Management Shell** and connect to Exchange Server.

2. Type the following line, and then press **ENTER**:

```
Get-Mailbox -ResultSize Unlimited | Add-MailboxPermission -User <Account> -
AccessRights FullAccess
```

where *<Account>* is the name of the service account to which the permissions will be assigned.

Important When a new mailbox is created, step 2 must be repeated.

Note The service account must be a member of the **Domain Users** group only. Membership of the **Domain Admins** group or any of the built-in Exchange security groups may deny required permissions.

For users upgrading from previous versions of Out-of-Office Extender, the permissions requirements have been simplified in this version. The following permissions can be removed from the service account:

- **Administer information store** (on servers and mailbox databases)
- **Receive-As** (on servers and mailbox databases)

Permissions for Exchange Server 2010 and 2013

Permissions requirements for the service account on Exchange Server 2010 and 2013 are:

- **Application Impersonation**

To assign the service account the required Exchange Server permissions, follow these steps:

1. Open the **Exchange Management Shell** and connect to Exchange Server.

2. Type the following line, and then press **ENTER**:

```
New-ManagementRoleAssignment -Role ApplicationImpersonation -User <Account>
```

where *<Account>* is the name of the service account to which the required role will be assigned.

For users upgrading from previous versions of Out-of-Office Extender, the permissions requirements have been simplified in this version. The following permissions can be removed from the service account:

- **Administer information store** (on servers and mailbox databases)
- **Receive-As** (on servers and mailbox databases)

Permissions for Windows XP and Windows Server 2003

The domain service account must have full read, write and create permissions on the folder containing the settings database `(settings.mdb)`, which is installed to a sub-folder in the main folder for the application (normally "`C:\Program Files\Symprex\Out-of-Office Extender\Database`"). To assign permissions, follow these steps:

1. Start **Windows Explorer**.
2. Navigate to the main installation folder, which is normally "`C:\Program Files\Symprex\Out-of-Office Extender`"
3. Right-click the folder containing the database, which is normally "`Database`", and click **Properties**.
4. Click the **Security** tab.
5. Click the **Add** button and enter the name of the domain service account being used, then click the **OK** button.
6. Ensure that the domain service account is granted the following permissions:

   - Modify
   - Read & Execute
   - List Folder Contents
   - Read
   - Write

7. Click the **OK** button, and then click the **OK** button again.

Permissions for Windows Vista and higher, and Windows Server 2008 and higher

The domain service account must have full read, write and create permissions on the folder containing the settings database `(settings.mdb)`, which is installed to a sub-folder in the main folder for the application (normally "`C:\Program Files\Symprex\Out-of-Office Extender\Database`"). To assign permissions, follow these steps:

1. Start **Windows Explorer**.
2. Navigate to the main installation folder, which is normally "`C:\Program Files\Symprex\Out-of-Office Extender`"
3. Right-click the folder containing the database, which is normally "`Database`", and click **Properties**.
4. Click the **Security** tab and click the **Edit...** button.
5. Click the **Add** button and enter the name of the domain service account being used, then click the **OK** button.
6. Ensure that the domain service account is granted the following permissions:

   - Modify
   - Read & execute
   - List folder contents
   - Read
   - Write

7. Click the **OK** button, and then click the **OK** button again.

Introduction 1

The Service Component

Configuration of the Symprex Out-of-Office Extender service can be completed using the Manage Service dialog, which is opened through the Service Status dialog. Alternatively, the Windows Services Manager can be used; how this is done depends on your operating system.

Windows XP and Windows Server 2003

1. Open **Control Panel**.
2. Open **Administrative Tools**.
3. Open **Services**.
4. Locate and open the **Symprex Out-of-Office Manager Service**.
5. Select the **Log On** tab.
6. Select the **This Account** option.
7. Select the appropriate account and enter the password.
8. Click **OK**.

The service can now be started.

Windows Vista and higher, and Windows Server 2008 and higher

1. Open **Control Panel**.
2. Open **System and Security**.
3. Open **Administrative Tools**.
4. Open **Services**.
5. Locate and open the **Symprex Out-of-Office Manager Service**.
6. Select the **Log On** tab.
7. Select the **This Account** option.
8. Select the appropriate account and enter the password.
9. Click **OK**.

Before starting the service for the first time, please ensure that configuration has been completed in the main application window.

Note When upgrading from Out-of-Office Extender v4.x or v5.0.0 to v5.0.1 or higher, the logon credentials for the service need to be reconfigured.

Exchange Server 2010 and 2013 Client Throttling Policies

In order for Symprex Out-of-Office Extender to function correctly on Exchange Server 2010 and 2013, it is necessary to disable client throttling for the service account. This can be accomplished as follows:

1. Open the **Exchange Management Shell** and connect to Exchange Server.

2. Type the following command:

```
New-ThrottlingPolicy <Policy>
```

where `<Policy>` is a suitable, unique name for the policy (for example, `OOXServiceAccountPolicy`)

3. On **Exchange Server 2010**, type the following command:

```
Set-ThrottlingPolicy <Policy> -EWSFastSearchTimeoutInSeconds $null -EWSFindCountLimit
$null -EWSMaxConcurrency $null -EWSMaxSubscriptions $null -EWSPercentTimeInAD $null -
EWSPercentTimeInCAS $null -EWSPercentTimeInMailboxRPC $null
```

4. On **Exchange Server 2013**, type the following command:

```
Set-ThrottlingPolicy <Policy> -EwsCutoffBalance Unlimited -EwsMaxBurst Unlimited -
EwsMaxConcurrency Unlimited -EwsMaxSubscriptions Unlimited -EwsRechargeRate Unlimited
-IsServiceAccount:$true
```

5. Type the following command:

```
Set-Mailbox <Account> -ThrottlingPolicy <Policy>
```

where `<Policy>` is the name of the policy and `<Account>` is the name of the service account to which
the policy will be assigned.

Note Changes to client throttling policies will not be applied immediately on your Exchange Server;
please allow some time for the changes to become effective.

Tutorial   **2**

Symprex Out-of-Office Extender is started by clicking its icon in the program group. When first started, an evaluation license will be automatically granted that will restrict the functionality of the application. Once you have obtained a valid license, please refer to the section about licensing.

Note The service for the application cannot be started until the evaluation license has been issued using the Administration tool.

After the splash screen has been displayed, the main application window will be initialised. From here, you can:

- manage the configuration of the service
- review the status monitor for the service

Warning Dialog as Start-Up

If the service for the application has not been correctly configured, the Service Status dialog will be displayed detailing the nature of the problem at start-up. Please refer to the Service Account topic on how to configure an account and the Service Component topic on how to configure the service to use the account.

The Main Application Window

The main application window has several areas, as shown below:
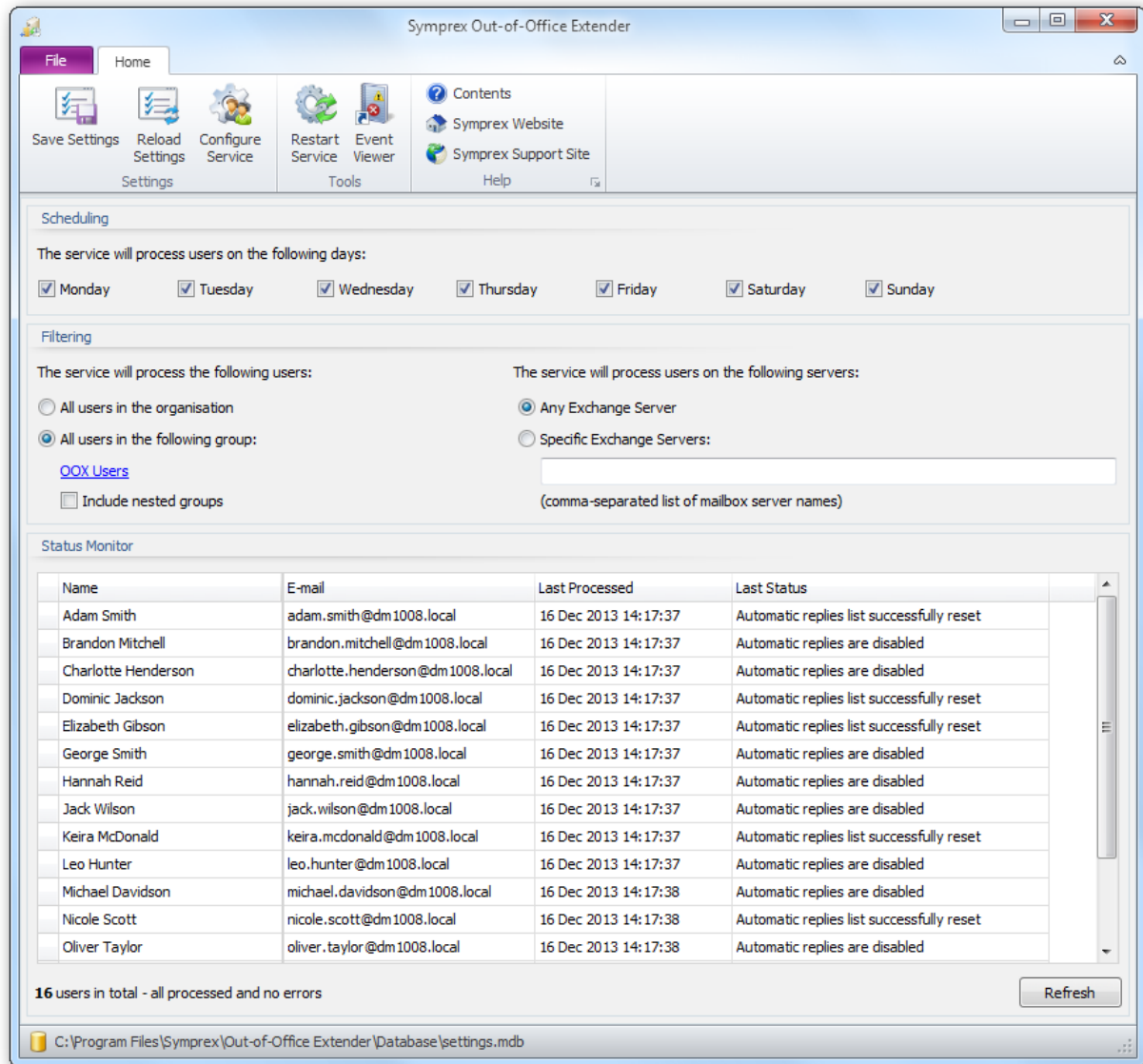
The ribbon at the top of the window provides access to all of the functions in the application. The ribbon can be collapsed to provide more area for the main content of the window by clicking the arrow in the top right-corner. When the status monitor has been populated, the database to which you are connected is displayed in the status bar at the bottom of the window. Further details and options about the application can be found by clicking the **File** button, which will display the File page.

The top part of the window is used to configure the service, and the bottom part of the window displays the status monitor for the application.

Scheduling

Tutorial

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These options specify on which days the service will reset the senders list for the mailboxes. By default, this will happen at midnight on every day of the week. If you wish to modify this, check or uncheck the appropriate days.

Filtering

These options configure which mailboxes the service will process when resetting the senders list. The options available are:

- **All mailboxes in the organisation**: Specifies that the service will process all mailboxes in your organisation.

- **All mailboxes in the following group:** Specifies that the service will only process users in a specific group. Click the hyperlink below this option to select the group using the Select Group dialog.

- **Include nested groups**: Specifies that users within child groups of the selected group are processed.

- **Any Exchange Server:** Specifies that the service will process mailboxes on all Exchange Servers in your organisation.

- **Specific Exchange Servers:** Specifies that the service will only process mailboxes on certain Exchange Servers. When selected, enter the list of server names in the box below the option; the names should just be the basic names of the server (i.e. not the fully qualified domain name) and multiple servers can be specified delimited by commas.

Status Monitor

The bottom part of the window displays the status monitor for the application, which lists the mailboxes that the service will process. To rebuild the status monitor with the latest information, click the **Refresh** button. In addition, the details for any mailbox in the grid can be viewed by double-clicking it, which will open the User Status dialog for that mailbox.

If you have made changes to the settings, click the **Save Settings** button in the ribbon to save them; the service will automatically pick them up (when users are next processed), so there is no need to re-start it. Alternatively, click the **Reload Settings** button to reload the settings currently being used by the service. To configure the service, click the **Configure Service** button to open the Service Status dialog.

If the settings have been changed or you wish to process users without waiting for the next scheduled reset, click the **Restart Service** button. Click the **Windows Event Log** to open the Windows Event Log console and review any events that the service may have generated.

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File Page

The File Page is displayed by the clicking the **File** button in the ribbon of the main application window.
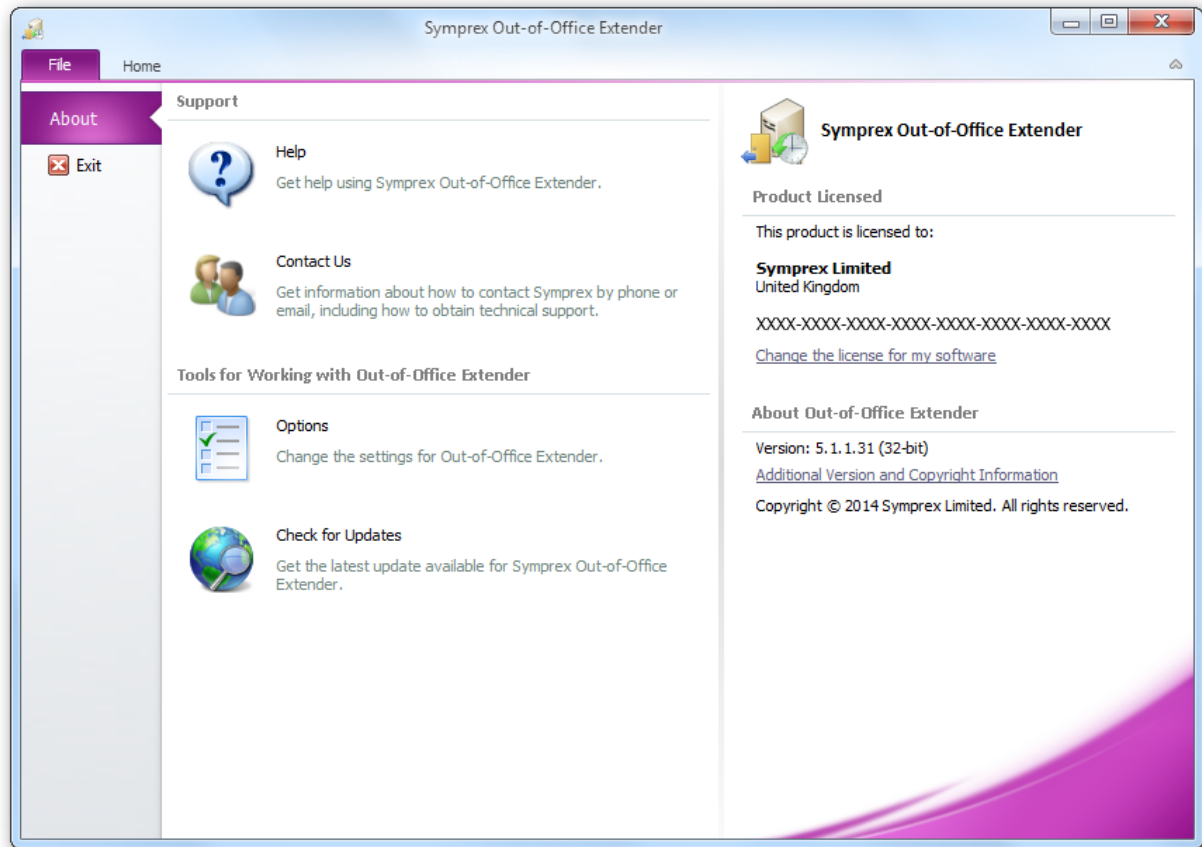
The left side of the window has various options for working with Symprex Out-of-Office Extender.

Help: Opens the application help on the Introduction page.
**Contact Us**: Opens the Support Centre on the Symprex website.
Options: Opens the Options dialog to configure application settings.
Check for Updates: Checks for updates to Symprex Out-of-Office Extender

The right side of the window displays information about your license and details for Symprex Out-of-Office Extender, such as the version number and compilation. This information can be useful if you need to contact Symprex for technical assistance.

Select Group Dialog

The Select Group dialog is opened by clicking on the group hyerplink in the **Filtering** section of the main application window.

Tutorial 2
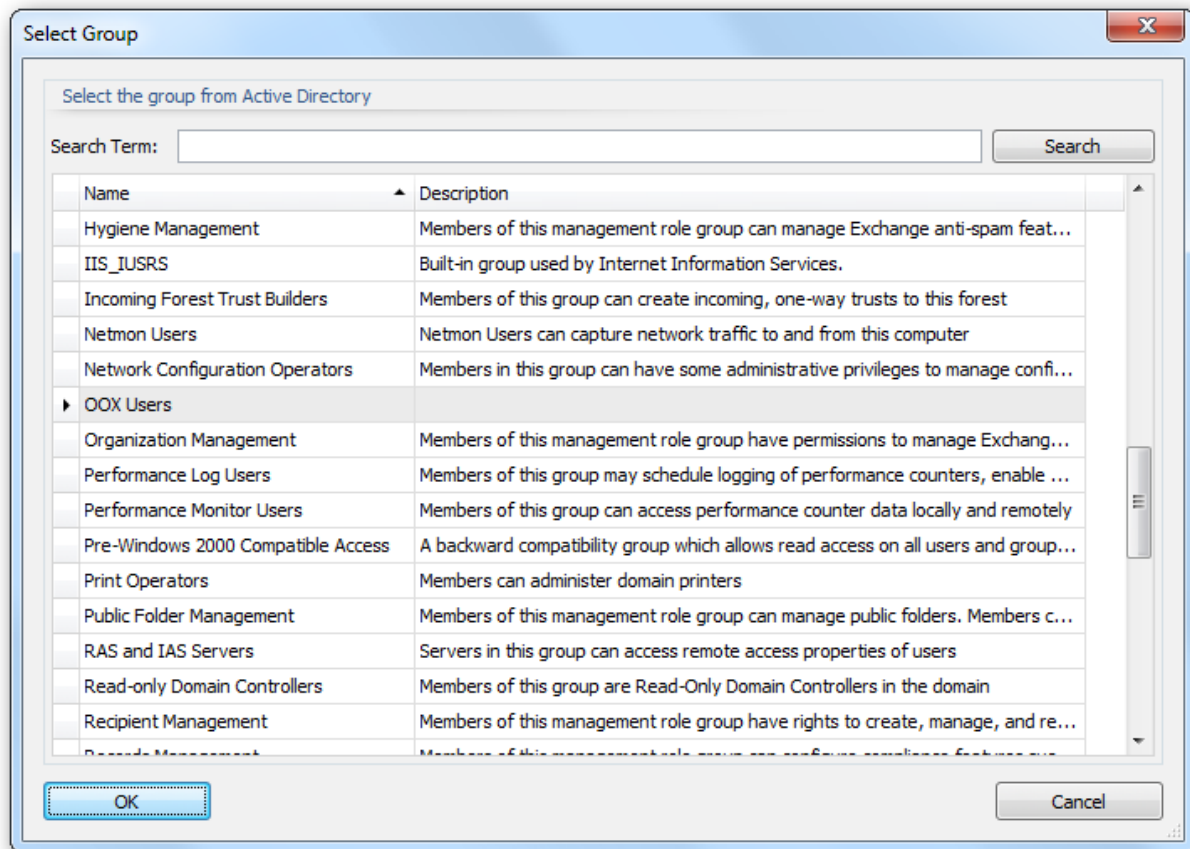
This dialog is used to locate the group for which users will be processed by the Out-of-Office Extender service. At the top of the window, enter an appropriate **Search Term**, which defines the starting character(s) for the group name, and then click the **Search** button to locate the group or groups that match the term. Select the group that you wish to the service to process and click the **OK** button. Otherwise, click the **Cancel** button to close to the dialog.

User Status Dialog

The User Status dialog is opened by double-clicking on the status record for a user in the Status Monitor grid of the main application window.
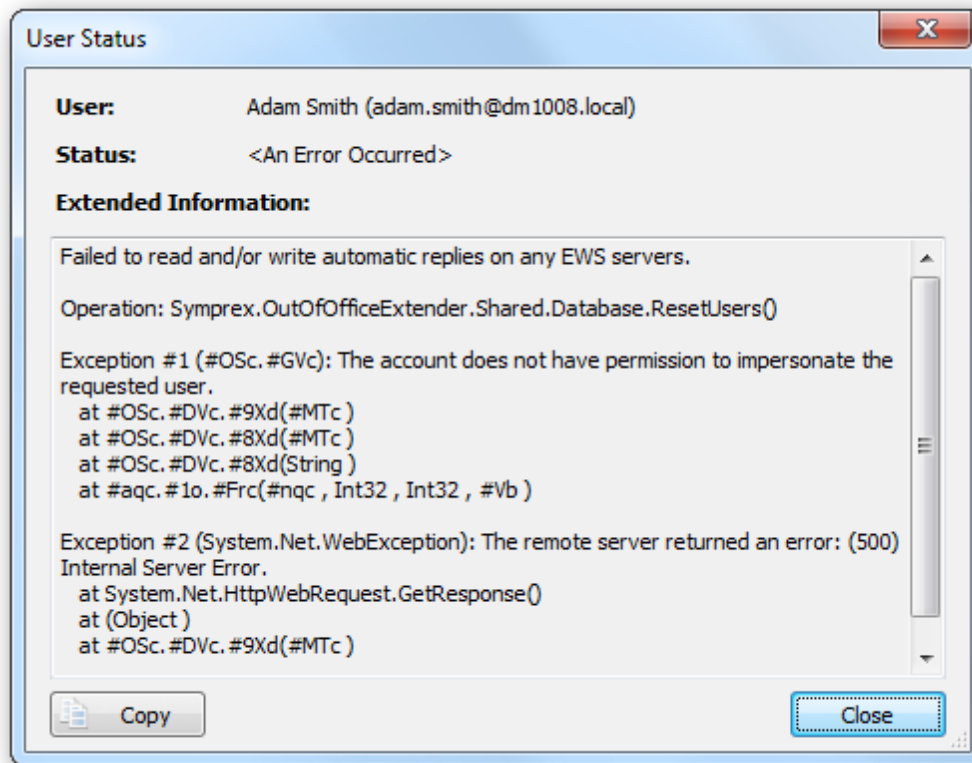
For the selected status record, the user's details and status are displayed. If any errors occurred processing the mailbox, they are shown in the **Extended Information** box. To copy this information to the clipboard, click the **Copy** button. When finished, click the **Close** button.

Service Status Dialog

The Service Status dialog is displayed automatically when the application starts if the Out-of-Office Extender Service is not configured correctly. It can also be opened by clicking the **Configure Service** button in the **Settings** group of the main application window.

Tutorial 2
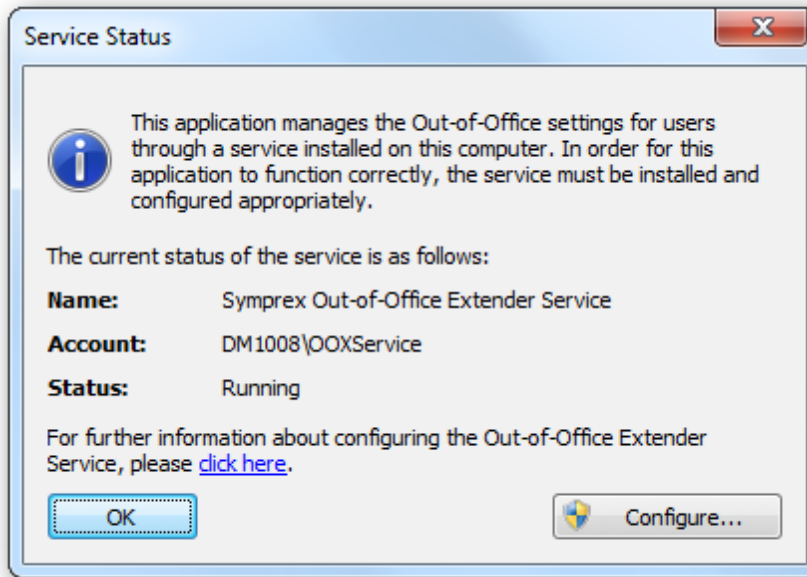
Note The dialog can also be opened by clicking the caption button the **File** group in the ribbon on the main application window.

The dialog displays information about the current status of the Out-of-Office Extender Service. The information is as follows:

- **Name**: The name of the service, as displayed in the Service Control Manager.
- **Account**: The Windows logon account being used by the service.
- **Status**: The current status of the service (running, stopped etc.).

In order for the application to use the service, it needs to be properly installed and configured; any serious problems are displayed in this dialog. To configure the service, click the **Configure** button to open the Manage Service dialog. For further information about how to complete the configuration of the service after installation, please refer to this topic.
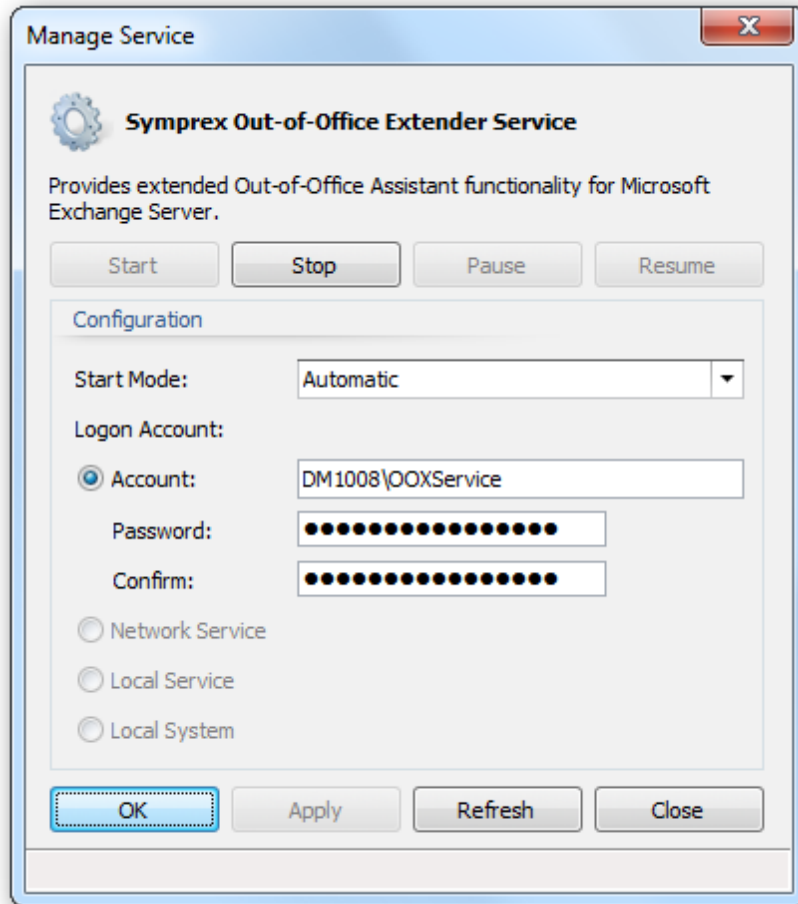
Note Symprex Out-of-Office Extender is not able to determine if the account has the required Exchange permissions. Please follow the steps in the Service Account topic as appropriate.

Manage Service Dialog

The Manage Service dialog is opened by clicking the **Configure** button the Service Status dialog.

The top portion of the window displays the details and status of the Symprex Out-of-Office Extender service. If it is not running, the service can be started by clicking the **Start** button, or it can be stopped by clicking the **Stop** button.

Note: The service can not be paused, so the *Pause* and *Resume* buttons will remain disabled.

The **Configuration** area is used to configure how the service behaves.

- The **Start Mode** option determines how the service behaves when Windows is started. This should normally be left as **Automatic** so that the service starts when Windows starts.
- The **Logon Account** is used to specify the Windows account under which the service runs. It is crucial that this account is configured correctly to access you Exchange Server. Please refer to this topic for further details on how to configure the logon account.

Note: The service must *always* be run using a logon account that has appropriate permissions. Hence, the *Network Service, Local Service* and *Local System* options are not available.

Tutorial

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Once the configuration has been updated, click the **OK** button to apply the changes and close the dialog, or click the **Apply** button to apply the changes without closing the dialog. Click the **Refresh** button to refresh the dialog, or click the **Close** button to close the dialog without saving changes.

Options Dialog

The options dialog is opened by select the File page in the main application window and clicking the **Settings** button.
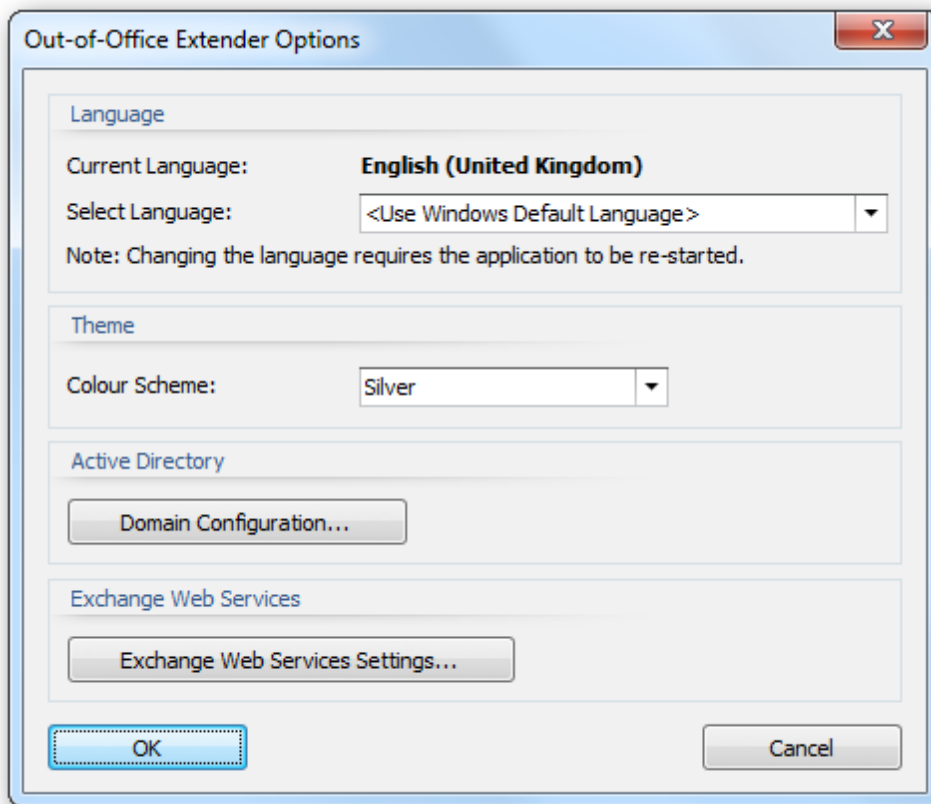
The following settings can be modified:

Language: Allows you to specify the language used by the application. This will default to your current Windows language (if available) or you can choose a specific language from the drop-down list.
Colour Scheme: Allows you to choose the colour scheme for the main application window.
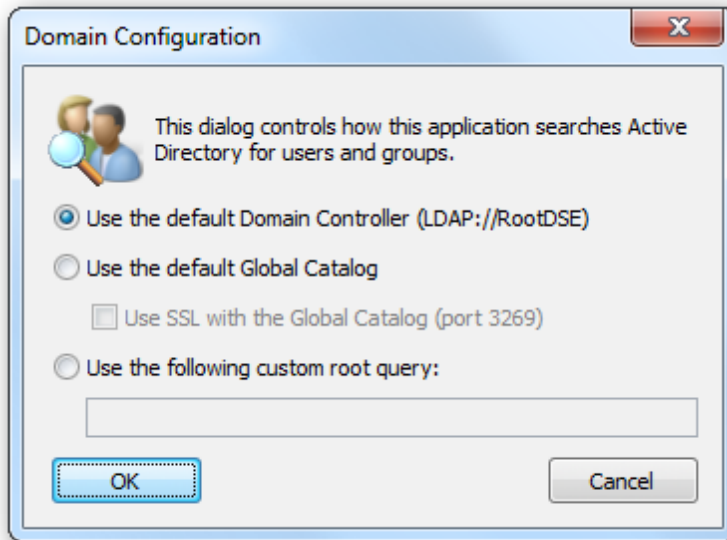**Domain Configuration**: Opens the Domain Configuration dialog.
Exchange Web Services Settings: Opens the Exchange Web Services Settings dialog.

To accept the changes you have made, click the **OK** button. Otherwise, click the **Cancel** button to close the dialog.

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Domain Configuration

The Domain Configuration dialog is opened by clicking the **Domain Configuration...** button on the Options dialog.

This dialog is used to configure how the Select Group dialog searches Active Directory for groups. By default, only the local domain controller will be queried. In an organisation with several domains, it may be desirable to find a group in another domain. One of the following options can be selected:

Option	Description
Use the default Domain Controller	Specifies that the groups are located by an LDAP query to the local domain controller. This option will only return groups in the local domain.
Use the default Global Catalog	Specifies that the groups are located by an LDAP query to the Global Catalog server for the domain. This option will return all groups that are replicated to the Global Catalog (for example, groups from trusted or child domains). If necessary, select the **Use SSL with the Global Catalog** to make the query use a secure connection to the Global Catalog server on port 3269.
Use the following custom root query	Specifies that the specified root query will be used to locate groups.

When the settings have been configured as required, click the **OK** button save your changes and close the dialog. Alternatively, click the **Cancel** button to close the dialog without saving any changes.

Exchange Web Services Settings

The Exchange Web Services Settings dialog is opened by clicking the **Exchange Web Services Settings...** button on the Options dialog.
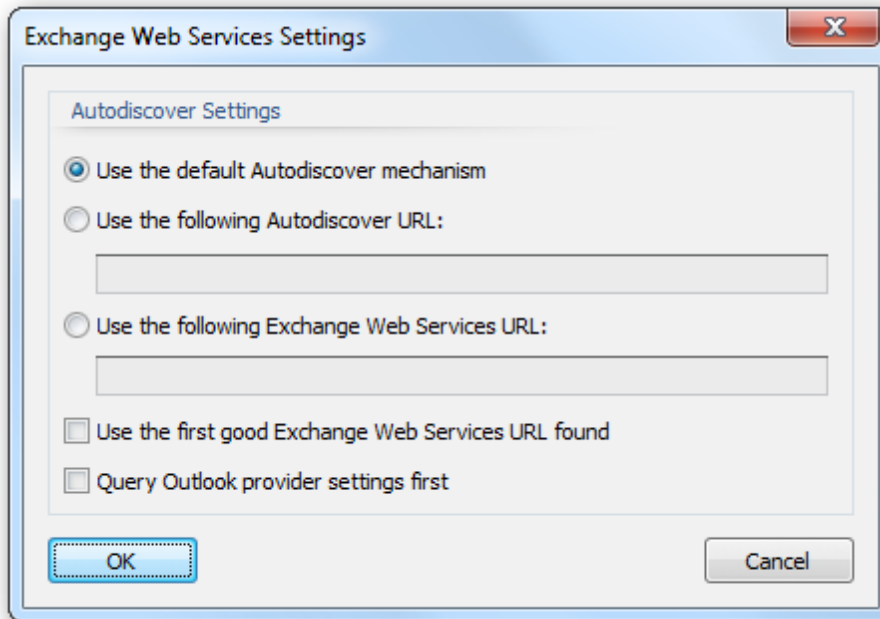
When resetting the automatic replies senders list, Out-of-Office Extender connects using to Exchange Server via Exchange Web Services (EWS). In order to connect to EWS, it is necessary to determine the URL for EWS using a process called Autodiscover. This dialog is used to configure how the Autodiscover process works.

Note In normal conditions, the connection to EWS will be configured automatically using the Autodiscover mechanism built into Exchange Server. It should only be necessary to change these advanced settings if specific problems are being encountered that prevent Autodiscover from working correctly and/or performance problems are being encountered.

The following settings can be configured:

Setting	Description
Use the default Autodiscover mechanism	Specifies that the default Autodiscover mechanism should be used; this is the normal setting. The default mechanism will query Active Directory for the appropriate Service Connection Points (SCPs) and then attempt to connect to each one to obtain the URL to Exchange Web Services. Each SCP is a URL to an Autodiscover service hosted on an Exchange Server.
Use the following Autodiscover URL	Specifies that the Autodiscover mechanism should use the specified fixed URL, instead of querying Active Directory for the Service Connection Points.
Use the following Exchange Web Services URL	This setting disables the Autodiscover mechanism and forces the connection to Exchange Web Services to use the specified fixed URL *for all users*.
Use the first good Exchange Web Services URL found	When the default Autodiscover mechanism is being used, this setting stipulates that once the first good EWS URL has been discovered (from an SCP), the mechanism should stop and use that URL alone (rather than continuing and querying further SCPs). This can be useful if you have a number of Autodiscover servers (i.e. a number of SCPs), some of which are not currently available.
Query Outlook provider settings first	When using the Autodiscover mechanism, each Autodiscover service (i.e. each SCP) is queried using the standard Autodiscover protocol. If this fails, the service is queried for the settings to be used by Outlook (which uses a different protocol). In some environments, the standard Autodiscover protocol is not available on any server, so it is beneficial (from a performance standpoint) to query for the Outlook Provider settings first.

When the settings have been configured as required, click the **OK** button save your changes and close the dialog. Alternatively, click the **Cancel** button to close the dialog without saving any changes.

Licensing

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This section of the help file describes how Symprex Out-of-Office Extender is licensed using either a [download key](#) or a [license supplied separately](#).

License Dialog

The License dialog is accessed by selecting the **File** tab in the main application window and clicking the **License my software** link (if the application has not previously been licensed) or **Change the license for my software** link (if the application has been licensed).
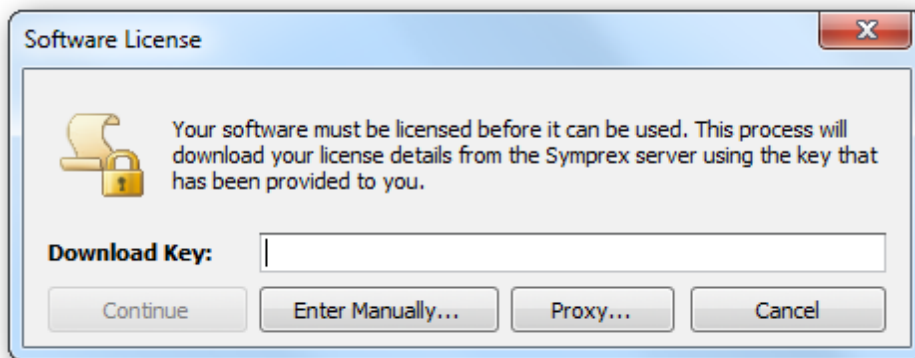
When you purchased the license for your software, you should have been provided with a unique download key. Enter this key into the **Download Key** textbox and click the **Continue** button. The software will then connect to the Symprex licensing server to download and install your license.

If the computer you wish to license does not have an Internet connection, you may be provided with a file containing you license information. To license your software using such a file, click the **Enter Manually...** button to open the [Manual License dialog](#).

In some organisations, the computer you wish to license may connect to the Internet through a proxy server that requires authentication. If this is the case, click the **Proxy...** button to open the [Proxy Details dialog](#).

If you experience any problems in licensing your software, please contact Symprex or your distributor for assistance.

Manual License Dialog

If necessary, the license for your software can be entered manually by clicking the **Enter Manually...** button on the [License dialog](#).
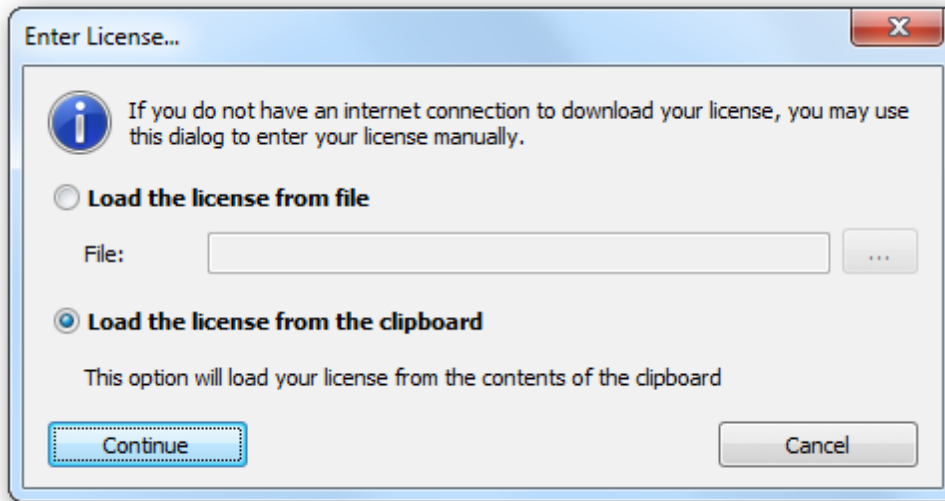
- If you have been provided with a file containing your license, select **Load the license from file** and locate the appropriate file.
- If you have been provided with a text-based version of your license (for example, in an e-mail), copy the text into the clipboard.

When ready, click the **Continue** button. If the selected file is valid or there is valid data in the clipboard, your license will be installed. Otherwise, please contact Symprex or your distributor for assistance.

Proxy Details Dialog

If necessary, the details of your default proxy server (as configured using Microsoft Internet Explorer) for connecting to the Internet can be entered manually by clicking the **Proxy...** button on the License dialog and the Upgrade License dialog.

Licensing
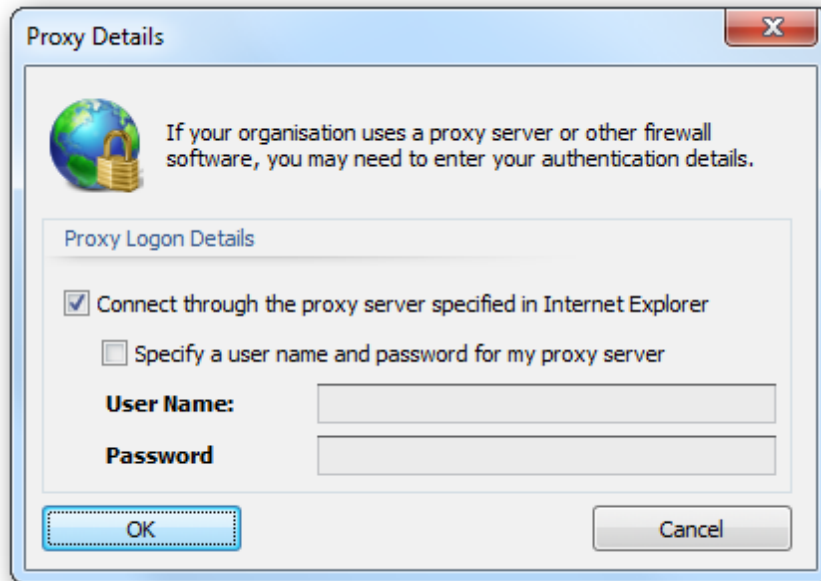
To connect through your default proxy server using your Windows logon credentials, check the **Connect through the proxy server specified in Internet Explorer** checkbox. If you need to specify your authentication details, check the **Specify a user name and password for my proxy server** checkbox, and then enter the appropriate details in the **User Name** and **Password** boxes. When ready, click the **OK** button to accept the changes or click the **Cancel** button to close the dialog without saving any changes.
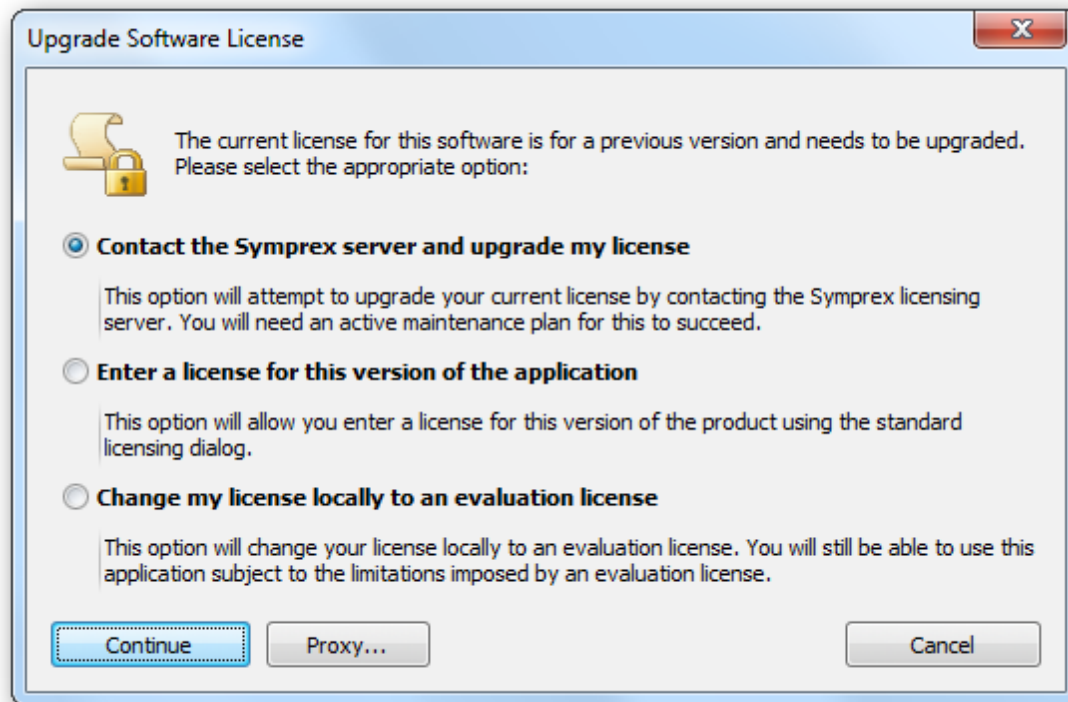
Note: The details you enter will be stored in the registry of your computer and will be re-used amongst all Symprex products.

Upgrade License Dialog

The Upgrade License dialog is displayed automatically when Out-of-Office Extender detects that it is using a license from a previous version.

There are three options available:

- **Contact the Symprex server and upgrade my license**: When you select this option, Out-of-Office Extender will contact the Symprex licensing server and attempt to upgrade your existing license to the current version. In order for this to succeed, there must be an active maintenance plan for the license that is currently in use. If the maintenance plan has expired, you will need to contact your distributor to restart maintenance and obtain an upgraded license. In some organisations, the computer you wish to license may connect to the Internet through a proxy server that requires authentication. If this is the case, click the **Proxy...** button to open the Proxy Details dialog.

- **Enter a license for this version of the application**: Choose this option if you have already been supplied with the download key or license file for your the current version; this will open the License dialog and allow you to enter the details of your license.

- **Change my license locally to an evaluation license**: This option will change the existing license to an evaluation license for the current version, which means that you can continue using Out-of-Office Extender but subject to the evaluation restrictions imposed.

When you have selected the appropriate option, click the **Continue** button. Alternatively, if you do not wish to modify the license (for example, because you wish to reinstall the previous version to continue using your existing license), click the **Cancel** button.

Copyright

<div style="text-align: right; font-size: large;">**4**</div>

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Contacting Symprex

<div style="text-align: right; font-size: 2em;">5</div>

There are several ways to contact Symprex.

Visit Our Web Site

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http://www.symprex.com

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