

Symprex Folder Permissions Manager

User's Guide

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Version 4.1.

The Symprex logo consists of the word "Symprex" in a white, italicized, sans-serif font, centered within a solid orange rectangular background.

Symprex Ltd.,
London, England.

Web: <http://www.symprex.com>

General: info@symprex.com

Sales: sales@symprex.com

Support: support@symprex.com

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1 INTRODUCTION

Symprex Folder Permissions Manager is a powerful application that allows you to view and change permissions on folders within individual mailboxes, groups and address lists. Common sets of permissions can be stored within templates and applied as desired to make repetitive tasks much simpler. Permissions can be applied to a folder and its sub folders, or to any set of folders on the server, and specified permissions can be appended, replaced, removed or updated.

Symprex Folder Permissions Manager is also the perfect tool for maintaining and enforcing permissions on mailboxes and folders according to a defined policy. For example, it is easy to ensure that all receptionists have Reviewer permissions on all Calendar folders, or that all users have Author permissions on all Contact folders.

1.1 System Requirements

Symprex Folder Permissions Manager requires:

- When installing on workstation:
Microsoft Windows NT4 (SP3 or later), 2000, XP or Vista
Microsoft Outlook 2000, 2002 (SP3 or later), 2003 or 2007
- When installing on server:
Microsoft Windows Server NT4 (SP3 or later), 2000 or 2003
Microsoft Exchange 5.5, 2000, 2003 or 2007
- 10 MB free hard-disk space
- 800 x 600 or higher screen resolution
- Supports use via terminal services on the above listed server platforms

Symprex Folder Permissions Manager can access mailbox and public folders on any Exchange 5.5, 2000, 2003 and 2007 server. Please note recommended settings for Exchange 2003 and 2007 servers described in §4.1.

1.2 Permissions Requirements

Symprex Folder Permissions Manager requires you to be logged on to Windows with a domain account that must have certain permissions in the domain and on your Exchange server (see §5).

2 TUTORIAL

2.1 Getting Started

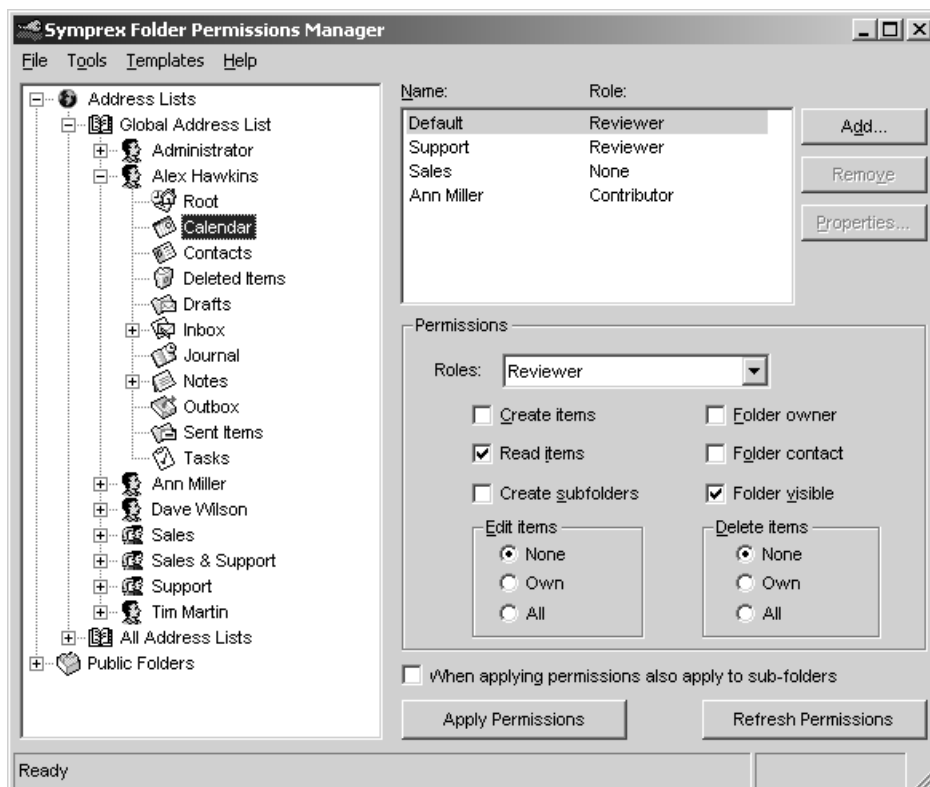
Symprex Folder Permissions Manager is started by clicking its icon in the program group. If the application is running in evaluation mode, a window will be displayed advising you of the number days remaining in the evaluation period. If you have purchased a license, you can enter it by clicking the **Enter Registration...** button.

After the splash screen has been displayed, you may be required to select the profile of the Exchange user you wish to connect as. Once successfully logged on, the main application window will be opened.

Symprex Folder Permissions Manager requires you to be logged on to Windows with a domain account that must have certain permissions in the domain and on your Exchange server (see §5).

2.2 The Main Application Window

The main application window is split in to two parts.



The left-hand side of the window displays a tree of your Exchange system, including all address lists, distribution lists, mailboxes and folders for each mailbox, and the Public Folders. Expanding the nodes (either by double-clicking

the node itself or clicking the “+” box to the left of the node) will reveal the contents of that node.

Note By default, the application shows all folders within each mailbox. This can be modified by the “Only Show Default Folders” option; see §2.4.

The right-hand side of the window displays the permissions for the currently selected folder from the Exchange system tree (when a non-folder node is selected, the controls will be disabled).

The main list shows the users who have permissions on the selected folder. The list may be changed by using the **Add** and **Remove** buttons, or you may view the properties of an existing user in the list by clicking the **Properties** button. Below the list, the permissions that the selected user has are displayed. To change the permissions, either select the pre-defined role from the drop-down list or set custom properties using the appropriate check boxes.

Check **When applying permissions also apply to sub-folders** to apply the permissions to the currently selected folder and its sub-folders.

Once you are happy with the changes made, click the **Apply Permissions to Folder** button. Alternatively, to restore the original permissions as currently set, click the **Refresh Folder Permissions** button.

Note For a full description of how permissions can be set, see §4.5.

2.3 Menus

2.3.1 File Menu

The File menu contains the following items:

- Options – displays the Options dialog (see §2.4).
- Exit – closes the application.

2.3.2 Tools Menu

The Tools menu contains the following items:

- Apply Permissions to Group – displays the dialog to set the permissions of a group of folders (see §2.5).
- Generate Report – generates a report of the permissions for the selected group (see §2.6).

2.3.3 Templates Menu

The Templates menu contains the following items:

- Manage Templates – displays the Templates Manager window (see §3.1).
- Apply Template – when an item from the Exchange system tree that can have a template applied is selected, this menu item displays the Template Manager window in Apply mode (see §3.3).

2.3.4 Help Menu

The Help menu contains the following items:

- Contents – displays the help system for the application.
- Symprex Web Site – opens your default Internet browser at the Symprex Web Site homepage.
- Symprex Support Page – opens your default Internet browser at the Symprex support web page.
- About – displays the About box for the application.

2.3.5 Context-Sensitive Menu

The context-sensitive menu is displayed when an item in the explorer is right-clicked. The menu contains the following items:

- Apply Permissions to Group... – displays the dialog to set the permissions of a group of folders (see §2.5).
- Apply Template... - displays the dialog to apply a template (see §3.3).
- Manage Templates... - displays the dialog to manage templates (see §3.1).
- Refresh... - refreshes the selected item.
- Generate Report... – displays the report dialog (see §2.6).

2.4 Options

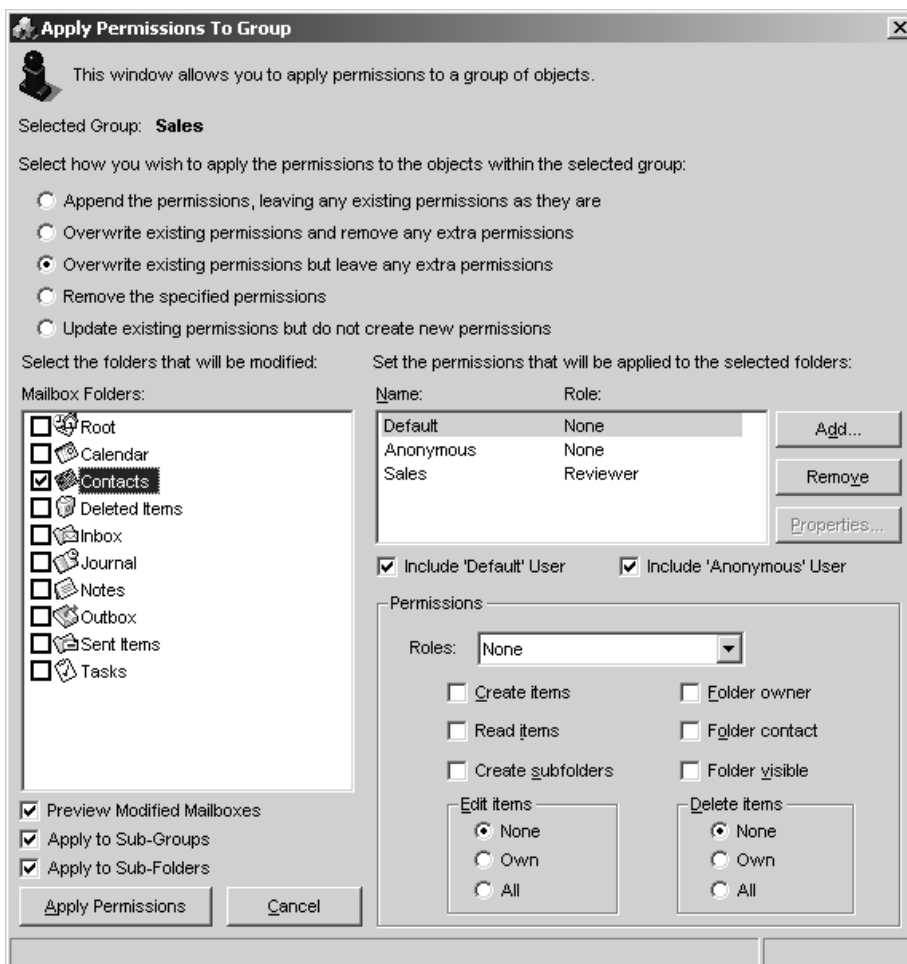
The Options dialog is opened by selecting the **File > Options...** menu item. The following options are available:

- Only Show Default Folders – forces the explorer to only show the default Exchange folders within each mailbox. This can be faster than retrieving all of the folders within a mailbox.
- Confirm applying new permissions – makes the application prompt for confirmation when new permissions are being applied.
- Give restored user default rights (Outlook behaviour) – in Microsoft Outlook, if a user is removed and then re-added to the list of permissions, they are always assigned the default rights. This can be annoying if the user had other rights when they were deleted. By de-selecting this option, the application will restore the original rights for the user if they are removed and re-added, but only whilst the changes have not been applied.

- Disable Splash Screen (Registered Version only) – prevents the splash screen from being displayed when the application is started. This setting only has effect in the registered version of the application.
- Use Current Profile – when checked, the application will log on your Exchange Server using the current mail profile if such a profile is currently logged on (for example, if you are using Microsoft Outlook). If a profile is not available or this option is not checked, the “Choose Profile” dialog is displayed when the application starts.

2.5 Apply Permissions to Group

This dialog allows permissions to be set to a group of folders without the requirement to create a template. To open the dialog, select the appropriate group and either select the **Tools > Apply Permissions to Group...** menu item or right-click the item and select **Apply Permissions to Group**.



The top of the dialog displays the group that will be modified. Select how the permissions will be applied from the options at the top of the dialog (see below for more information on these options). Then select the folders that will be modified from the list of the left of the dialog, and which permissions will be set on the right of the dialog.

You can choose how permissions will be applied from one of the following options:

- Append Mode – only new permissions are added; any existing permissions on the folders will remain in place and will *not* be overwritten by the permissions defined in the template.
- Overwrite mode – all existing permissions (except those of the Default and Anonymous users) are removed and overwritten by the permissions defined in the template.
- Overwrite, No Delete mode – all existing permissions are overwritten but those not specified in the template will not be removed.
- Remove – all permissions specified in the list will be removed but other existing permissions will not be altered.
- Update – all permissions defined in the list will be updated but any that do not exist will not be created.

Note The permissions for the Default and Anonymous users can be updated but if they do exist within the permissions for a folder, they will **not** be created.

Note For a full description of how permissions can be set, see §4.5.

The three check-boxes at the bottom of the window control are context-sensitive to the type of object selected in the explorer. They will be available as follows:

When a Single Mailbox is Selected

- “Preview Modified Mailboxes” is disabled.
- “Apply to Sub-Folders”; when checked, any user-created folders within the selected top-level folders will be modified.

When a Mailbox Group is Selected

NB. A “Mailbox Group” is a generic term for Distribution and Address Lists

- “Preview Modified Mailboxes”; when checked, will cause a list of the mailboxes that will be affected by the changes to be previewed in a separate window.
- “Apply to Sub-Groups”; when checked, all child mailbox groups within the selected group will be modified.
- “Apply to Sub-Folders”; when checked, any user-created folders within the selected top-level folders will be modified.

When a Public Folder is Selected

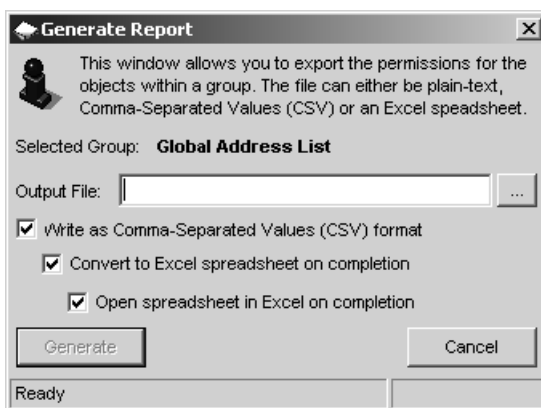
- “Preview Modified Folders”; when checked, will cause a list of the folders that will be affected by the changes to be previewed in a separate window.

- “Apply to Sub-Folders”; when checked, any sub-folders within the selected Public Folder will be modified.

To apply the permissions to the objects within the selected group, click the **Apply Permissions** button. To close the dialog without applying any changes, click the **Cancel** button.

2.6 Report

The Report dialog is used to generate a file containing the permissions set on the objects within the selected group of the explorer. To open the dialog, select the appropriate group and either select the **Tools > Generate Report...** menu item or right-click the item and select **Generate Report....**



Enter the output file in the box at the top of dialog, or click the “...” button to select a file. The file may be generated in one of three formats:

Output Format	Settings
Plain text	De-select the Write as Comma Separated Values format check-box
CSV (Comma-Separated Values)	Select the Write as Comma Separated Values format check-box
Microsoft Excel	Select the Convert to Excel Spreadsheet on completion checkbox, which converts the CSV output file to Excel format.

Note Excel 2000 or later must be installed to generate Excel spreadsheets.

If the output file is in Excel format, the spreadsheet may be opened automatically by selecting the **Open spreadsheet in Excel on completion** checkbox.

To generate the output file, click the **Generate** button or close the dialog by clicking the **Cancel** button.

3 TEMPLATES

The Templates feature of the application allows the administrator to create a set of standard permissions to be applied to Mailboxes and Public Folders.

3.1 The Templates Manager

The Templates Manager dialog is used to manage your templates. The main part of the dialog displays a list of the templates available in the database. The view may be changed between icons and a list using the buttons in the toolbar at the top of the window.



The following actions may be performed:

- To create a new template ► click the **New** button. The Template Wizard will be opened in Create mode.
- To edit an existing template ► select the template from the list, and either click the **Edit** or double-click the template. The Template Wizard will be opened in Modify mode.
- To delete an existing template ► select the template from the list and click the **Delete** button.

3.2 The Template Wizard

The Template Wizard is used to either create a new template or modify an existing template. The wizard guides you through a series of steps to configure the template. At any stage, you may cancel the process by clicking the **Cancel** button to return to the Manager dialog. To proceed to the next step, click the **Next** button, or to return to a previous step, click the **Previous** button. Once the template is correctly configured, the **Finish** button will become enabled.

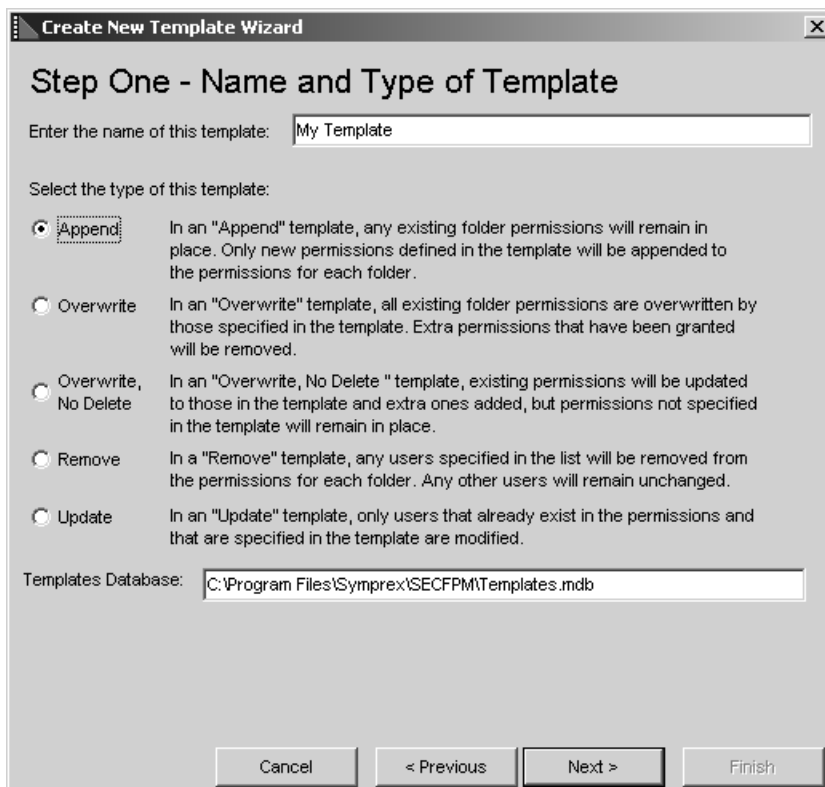
3.2.1 Welcome

This step simply welcomes you to the wizard. To prevent it from being displayed each time you run the wizard, select the **Do not show...** check box.

Click the **Next** button to proceed to the next step.

3.2.2 Step One – Name and Type of Template

This step configures the name and type of the template.



Enter/update the name of the template in the text box at the top of the dialog to identify the template in the list.

Choose the type of template from one of the following options:

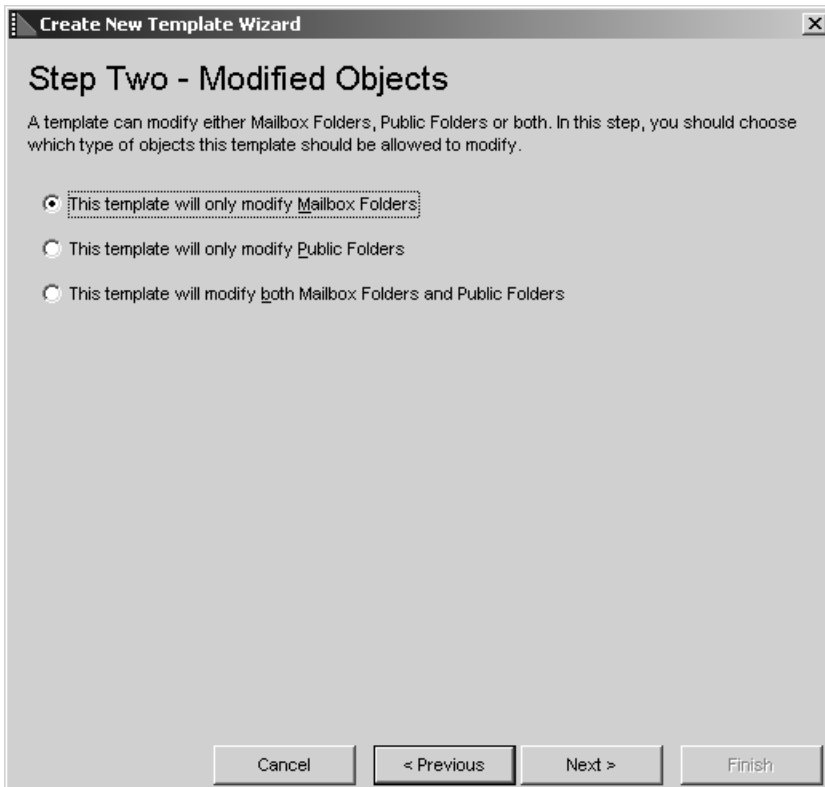
- **Append Mode** – only new permissions are added; any existing permissions on the folders will remain in place and will *not* be overwritten by the permissions defined in the template.
- **Overwrite mode** – all existing permissions (except those of the Default and Anonymous users) are removed and overwritten by the permissions defined in the template.
- **Overwrite, No Delete mode** – all existing permissions are overwritten but those not specified in the template will not be removed.
- **Remove** – all permissions specified in the list will be removed but other existing permissions will not be altered.

- Update – all permissions defined in the list will be updated but any that do not exist will not be created.

Click the **Next** button to proceed to the next step.

3.2.3 Step Two – Modified Objects

This step configures the objects that can be modified by the template.

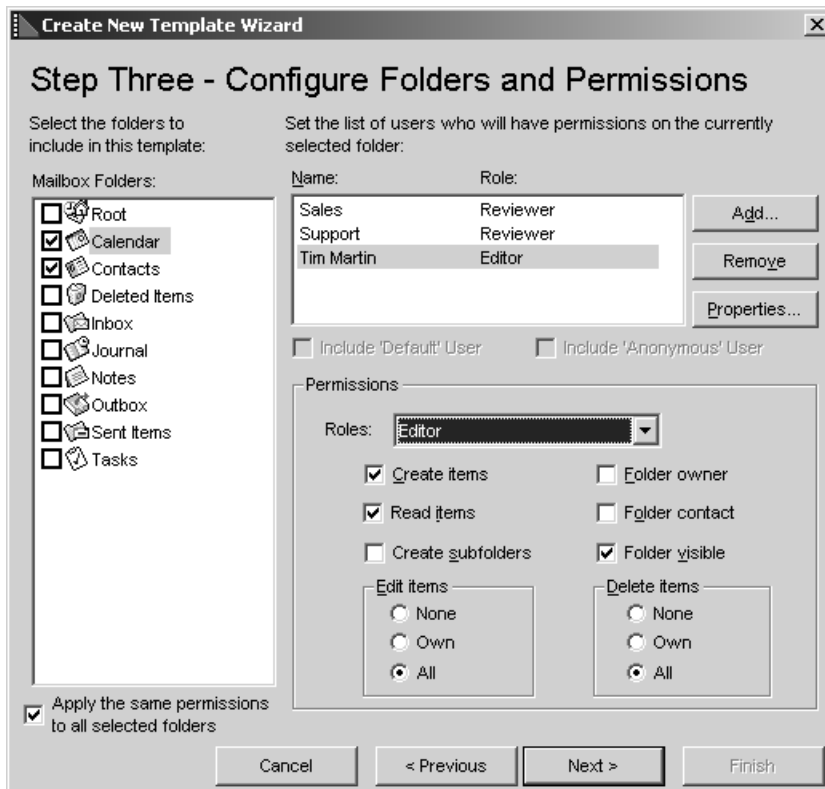


Select the appropriate option for the template depending on whether the template should alter Mailboxes only, Public Folders only, or both Mailboxes and Public Folders. Your selection here will determine which folders are available in Step Three.

3.2.4 Step Three – Configure Folders and Permissions

This step configures which folders the template will alter and what permissions are applied to those folders (see dialog top of next page).

Select the folders that the template should alter from the list of the left-hand side of the dialog. If the same permissions are going to be applied to all *selected* folders, select the **Apply the same permissions to all selected folders** check box. If this check box is unchecked, you must set the permissions individually for each selected folder.



On the right-hand side of the dialog, the permissions that will be set for each folder are displayed. These controls work exactly like the controls on the main window, except the Apply... and Refresh... buttons are not available.

Note The Default and Anonymous users can be modified by the template but if they do not exist, they will **not** be created.

Note For a full description of how permissions can be set, see §4.5.

Click the **Next** button to proceed to the next step.

3.2.5 Ready to Create/Update Template

This final step confirms you want to create or update the template you have been working on. If you are happy, click the **Finish** button. Alternatively, you may return to any previous step by clicking the **Previous** button.

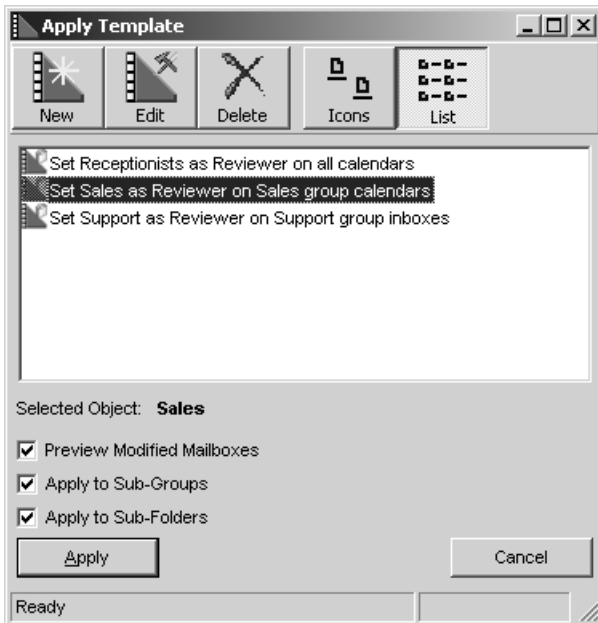
3.2.6 Finished!

The template has been created or updated. Click the **Close** button to close the wizard and return to the Template Manager window.

3.3 Applying a Template

To apply a template to a mailbox, distribution list, address list or Public Folders, select the appropriate node in the Exchange system tree of the main application window and click the **Templates > Apply Template...** menu item, or right-click

the node and select **Apply Template....** This will open the Templates Manager dialog in Apply mode.



The three check-boxes at the bottom of the window control are context-sensitive to the type of object selected in the explorer. They will be available as follows:

When a Single Mailbox is Selected

- “Preview Modified Mailboxes” is disabled.
- “Apply to Sub-Folders”; when checked, any user-created folders within the selected top-level folders will be modified.

When a Mailbox Group is Selected

NB. A “Mailbox Group” is a generic term for Distribution and Address Lists

- “Preview Modified Mailboxes”; when checked, will cause a list of the mailboxes that will be affected by the changes to be previewed in a separate window.
- “Apply to Sub-Groups”; when checked, all child mailbox groups within the selected group will be modified.
- “Apply to Sub-Folders”; when checked, any user-created folders within the selected top-level folders will be modified.

When a Public Folder is Selected

- “Preview Modified Folders”; when checked, will cause a list of the folders that will be affected by the changes to be previewed in a separate window.

- “Apply to Sub-Folders”; when checked, any sub-folders within the selected Public Folder will be modified.

To apply a template, select it from the list and click the **Apply** button. After confirming the action, the application will apply the template to the selected item. Bear in mind this can be a long process for distribution lists and address lists with several entries. The progress is displayed in a bar at the bottom-right of the window.

4 MISCELLANEOUS ISSUES

This section describes miscellaneous issues that relate to the operation of the application.

4.1 Exchange 2003/2007 Additional Information

Exchange 2003/2007 limits how many times specific objects on the server can be opened per session when using the MAPI interface. Two of these limits affect Folder Permissions Manager because the default values are very low.

To resolve this problem, you can add a registry key that changes the limits that affect Folder Permissions Manager. The new limits override the default limits of the server objects in question.

Warning If you use Registry Editor incorrectly, you may cause serious problems that may require you to reinstall your operating system. Symprex cannot guarantee that you can solve problems that result from using Registry Editor incorrectly. You use it at your own risk.

To add a registry key that change the limits, which affects Folder Permissions Manager, follow these steps:

1. Click **Start**, click **run**, type **regedit**, and then click **OK**.
2. Expand the following registry subkey of HKEY_LOCAL_MACHINE:
`\SYSTEM\CurrentControlSet\Services\MSExchangeIS\ParametersSystem`
3. Right-click **ParametersSystem**, point to **New**, and then click **Key**.
4. Type **MaxObjsPerMapiSession**, and then press ENTER to name the new subkey.
5. Right-click **MaxObjsPerMapiSession**, click **New**, and then click **DWORD Value**.
6. Type **objtFolder**, and then press ENTER to name the object.
7. Right-click **objtFolder**, and then click **Modify**.
8. In the **Value data** box, select **Hexadecimal** as **Base**, then type **1000**, and then click **OK**.
9. Right-click **MaxObjsPerMapiSession**, click **New**, and then click **DWORD Value**.
10. Type **objtACLView**, and then press ENTER to name the object.
11. Right-click **objtACLView**, and then click **Modify**.
12. In the **Value data** box, select **Hexadecimal** as **Base**, then type **100000**, and then click **OK**.

Note These settings are not required, but are recommended to be set.

4.2 Outlook 2000 Additional Information

A problem in the original release version of Outlook 2000 may prevent users from viewing folders as expected when permissions have been manipulated using third-party applications. Symprex Folder Permissions Manager¹ is **not** affected by this issue and is fully compatible with all versions of Outlook.

4.3 Public Folders and the Owner User

To prevent the contents of a Public Folder from becoming inaccessible, Folder Permissions Manager prevents the removal of the rights Folder Owner, Folder Visible and Edit Own Items for the Owner user of a Public Folder who created the particular folder. This behaviour is consistent with Outlook.

4.4 Read-Only Public Folders

You will not be able to modify the permissions on some Public Folders, and in some cases, you will not be able to review the permissions. This is a limitation of Outlook and not an intentional restriction of the application.

When previewing modified folders in either the Apply Permissions to Group dialog or Apply Template dialog, read-only folders will not be included in the list.

4.5 Setting Folder Permissions

This section describes how to set permissions on folders using the various dialogs in the application. These windows are the Main window (§2.2), the Template Wizard window (§3.2.4), and the Group Permissions window (§2.5).

4.5.1 Name/Role

Displays user names and their permissions for the folder. The default permission is the role granted to all general users.

Next to Name/Role box, the following buttons are available:

- Add – Selects user, distribution list, and public folder names to add to the **Name/Role** box.
- Remove – Removes the selected name from the Name/Role box.
- Properties – Displays details about the selected name.

4.5.2 Permissions

Specifies a role for the selected name. When you select a role, the permissions associated with that role are automatically selected. When you select individual permissions, the matching role name appears in the Roles box. If there is no

¹ Symprex Folder Permissions Manager version 3.5 and later.

matching role, Custom appears. You cannot select Custom; it appears automatically.

4.5.3 Roles

Specifies a role for the selected name in the **Name/Role** box.

Role	Description
Owner	Grants all permissions in the folder. Create, read, modify, and delete all items and files and create subfolders. The owner can also change permission levels that others have for the folder.
Publishing Editor	Grants permission to create, read, modify and delete all items and files, and create subfolders.
Editor	Grants permission to create, read, modify, and delete all items and files.
Publishing Author	Grants permission to create and read items and files, modify and delete items and files you create, and create subfolders.
Author	Grants permission to create and read items and files, and modify and delete items and files you create.
Nonediting Author	Grants permission to create and read items and files.
Reviewer	Grants permission to read items and files only.
Contributor	Grants permission to create items and files only. The contents of the folder do not appear.
None	Grants no permission in the folder. Use this as the default permission when you want to limit the folder audience to only users you specifically add to the Name/Role box.

4.5.4 Individual Permissions

The following table describes the effect of each individual permission that can be set.

Permissions	Description
Create Items	Grants permission to post items in the folder.
Read Items	Grants permission to open any item in the folder.
Create Subfolder	Grants permission to create subfolders in the folder.
Folder Owner	Grants all permissions in the folder.
Folder Contact	Grants folder contact status. Folder contacts receive automated notifications from the folder, such as replication conflict messages, as well as requests from users for additional permissions or other changes in the folder.
Folder Visible	Grants permission to see the folder.

4.5.5 Edit Items

Select one of the following options.

Option	Description
None	Does not allow changes to any item.
Own	Allows you to modify items you create.
All	Allows you to modify any item.

4.5.6 Delete Items

Select one of the following options.

Option	Description
None	Does not allow you to delete any item.
Own	Allows you to delete items you create.
All	Allows you to delete any item.

5 REQUIRED ACCOUNT PERMISSIONS

Symprex Folder Permissions Manager requires you to be logged into Windows with a domain account that has permissions on Exchange 5.5, 2000, 2003 and 2007, and in the domain, as described below.

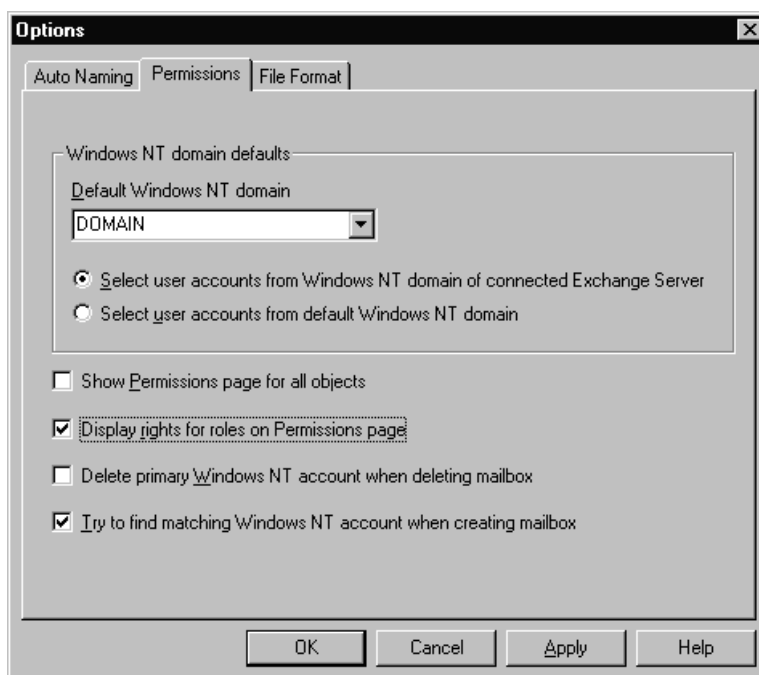
5.1 Exchange 5.5 Account Permissions

To make sure your account has the necessary permissions on Exchange 5.5, follow these steps:

Step 1

Open Microsoft Exchange Administrator, then:

- Open the **Options** dialog from the **Tools** menu.
- Make sure that the **Display rights for roles on Permissions page** is checked.

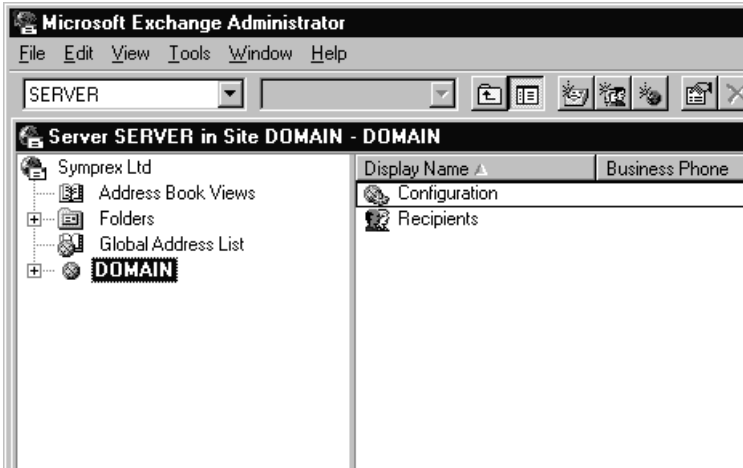


Step 2

Click the domain container, then:

- Open the **Properties** dialog from the **File** menu.

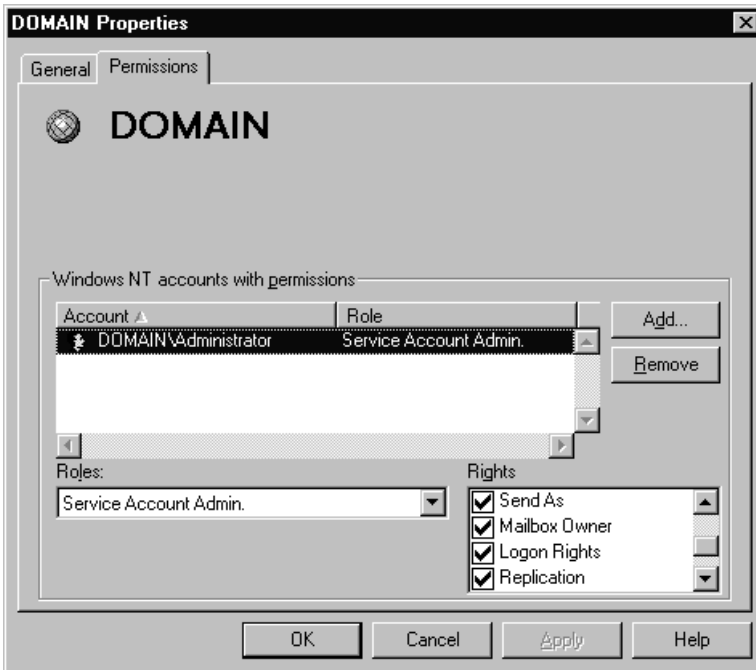
(see dialog top of next page)



Step 3

Select the **Permissions** tab in the domain properties dialog, then, for your account:

- Make sure **Mailbox Owner** is checked.
- Make sure **Logon Rights** is checked.



Step 4

Finally:

- Your account must be a member of the **Domain Admins** group.

Your account now has the required permissions.

5.2 Exchange 2000/2003 Account Permissions

To make sure your account has the necessary permissions on Exchange 2000 or 2003, follow these steps:

Note If your account is a member of the **Domain Admins** group, and it is *not* a member of any of the Exchange security groups installed with Exchange server, it will already have the necessary permissions by inheritance.

Step 1

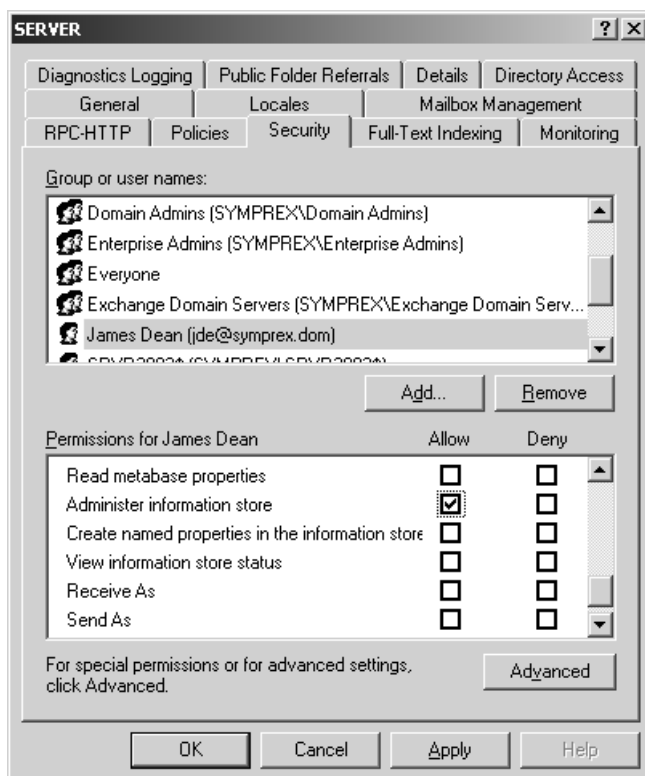
Open Exchange System Manager, then:

- Select your server (or mailbox store).
- Right-click and select **Properties** to open the **Properties** dialog.

Step 2

Select the **Security** tab in the server (or mailbox store) properties dialog, then:

- Add or select your account.
- Allow the **Administer information store** right.



Repeat the above steps for appropriate servers (or mailbox stores) as required.

Your account now has the required permissions.

5.3 Exchange 2007 Account Permissions

To make sure your account has the necessary permissions on Exchange 2007, follow these steps:

Note If your account is a member of the **Domain Admins** group, and it is *not* a member of any of the Exchange security groups installed with Exchange server, it will already have the necessary permissions by inheritance.

Step 1

Open the PowerShell, then:

- Assign your account the **Administer information store** right on your server (or mailbox store) by executing one of the following commands:

To assign the right on your server:

```
Get-MailboxServer "YourServer" |  
add-adpermission -user "YourAccount" -extendedrights  
ms-Exch-Store-Admin
```

To assign the right on your mailbox store:

```
Get-MailboxDatabase "YourServer\YourMdb" |  
add-adpermission -user "YourAccount" -extendedrights  
ms-Exch-Store-Admin
```

Note that you need to replace **YourServer** with the name of your server, **YourMdb** with the name of your mailbox store, and **YourAccount** with the account you want to assign the right.

Repeat the above steps for appropriate servers (or mailbox stores) as required.

Your account now has the required permissions.

6 CONTACTING SYMPREX

6.1 Visit our Web Site

Our web site provides general information about Symprex and our products:
<http://www.symprex.com>

If you experience technical problems with one of our products, please visit our support page:
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