



**ECAT**

**SWE**

**Exchange Customer Administration Tool  
Web Interface User Guide**

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**Version 6.7**

# SWE - Exchange Customer Administration Tool (ECAT) Web Interface User Guide

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## About this Guide

This section describes the audience, purpose, and organization of the guide.

## Audience and Purpose

This guide describes web interface user concepts, procedures and access roles for Mailbox Administration and Mailbox Properties Maintenance. Additionally, this guide will explain the use of the Exchange Customer Administration Tool (ECAT) known as Quest®ActiveRoles Server Web Interface.

The intended audience is for OTech customer Exchange Administrators and Help Desk staff. Exchange Administrators will be assigned the “Mailbox Administration” role and their functions will include adding, changing, and deleting mailboxes, groups and contact items. Help Desk staff will be assigned the “Mailbox Properties Maintenance” role and their functions may include performing maintenance on a limited number of data elements (e.g. Phone Number, Name, etc) associated with an individual’s mailbox.

## What is in this Guide?

The first chapter describes configuring and using the web interface. The second chapter describes the basic administrative tasks and the third chapter describes access roles and managing active directory objects.

This document is divided into three sections:

- Getting Started
- Web Interface Basics
- Managing Active Directory Objects

## CA.mail Website

If you want more information regarding the CA.mail Services and component services, please go to our website at [www.servicecatalog.dts.ca.gov](http://www.servicecatalog.dts.ca.gov).

## Contacting Customer Support

The CIO Service Support phone number, (916) 464-4311, is answered 24 hours a day, 7 days a week. Additionally, customers may choose to email the Service desk at [Service.desk@state.ca.gov](mailto:Service.desk@state.ca.gov) for assistance.

# Chapter 1: Getting Started

## Understanding the Web Interface for the Exchange Customer Administration Tool (ECAT)

The Exchange Customer Administration Tool uses Quest ActiveRoles Server to offer a convenient, easy-to-use, customizable Web interface that enables authorized users to perform day-to-day administrative tasks, such as modifying personal data or adding users to groups. Via the Web Interface, an intranet user can connect to ActiveRoles Server using Microsoft Internet Explorer. A user sees only the commands, directory objects, and object properties to which the user's role provides administrative access.

The Exchange Customer Administration Tool Web Interface User Guide is for individuals who are responsible for performing administrative tasks. This document provides a brief overview of the Web Interface, and includes procedures for performing administrative tasks.

The following sections describe the procedures for connecting to the Web Interface.

First, you must configure Microsoft Internet Explorer to display the Web Interface pages properly. Then, connect to the Web Interface. Finally, you may specify personal settings such as the interface language, color scheme, and number of objects per page.

## Configuring Microsoft Internet Explorer

Before connecting to the Web Interface, you should verify that your Web browser is configured properly. Use the following procedures to configure Microsoft Internet Explorer 7.x or 8.x to meet the requirements of the ActiveRoles Server Web Interface.

### *To configure Microsoft Internet Explorer version 7.x or 8.x*

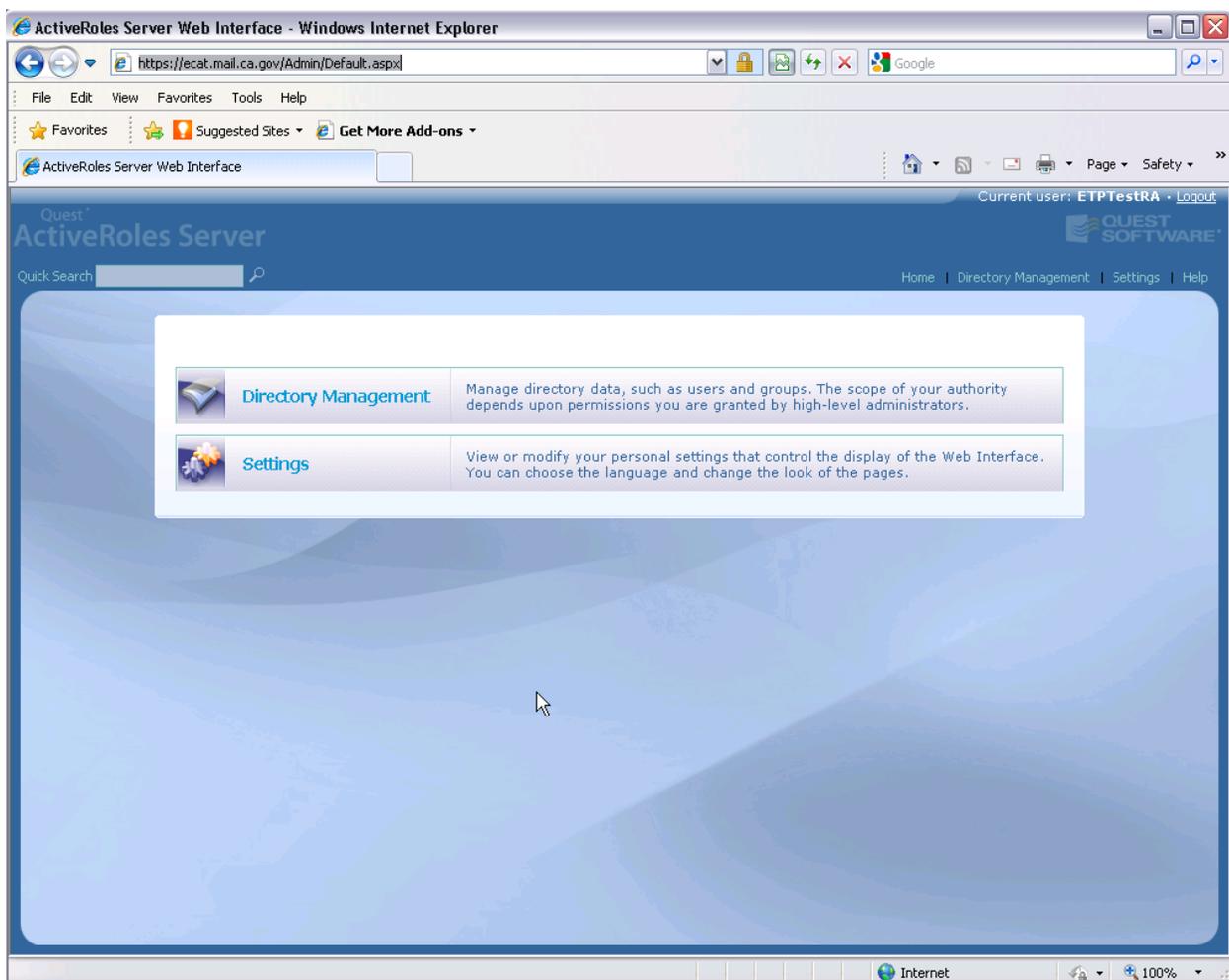
1. Start Microsoft Internet Explorer.
2. On the **Tools** menu, click **Internet Options**.
3. In the **Internet Options** dialog box, click the **Security** tab.
4. On the **Security** tab, click **Local intranet**, and then click **Custom Level**.
5. In the **Security Settings** dialog box, make sure that the **Enable** option is selected for the **Scripting | Scripting of Java applets** item.
6. Click **OK** to close the **Security Settings** dialog box.
7. In the **Internet Options** dialog box, click the **Privacy** tab.
8. In the **Settings** area, click **Default**.
9. Move the slider to select the **Medium** privacy setting.
10. Click **OK** to close the **Internet Options** dialog box.

## Connecting to the Web Interface

### To connect to the Web Interface

1. Start Microsoft Internet Explorer.
2. In the **Address** field, type the Web Interface's URL: <https://ecat.mail.ca.gov/Admin>
3. Press ENTER

*Once the Web browser has established a connection to the Web Interface, and after client gives login credentials, it displays the Web Interface home page, similar to the following figure.*



4. On the home page, click an item to perform a task.

## Changing Local Settings

When using the Web Interface for the first time, you can specify the Web Interface settings:

- **Number of objects to be displayed per page.** The number of objects displayed per page in object lists.
- **Number of pages to preload in object lists.** The number of pages the Web interface retrieves from the Administration Service at one time when preparing lists of directory objects.

These settings are saved on the local computer, that is, on the computer running the Web browser. The settings are stored on a per-site basis.

**NOTE:** Use the **Number of objects to be displayed per page** and **Number of pages to preload in object list** options carefully. When you specify small numbers, you will need to click page numbers or the **Next pages** button at the bottom of the list to see more objects or to load more pages. On the other hand, specifying unreasonably large numbers may result in network delays, degrading the performance of the Web Interface.

### ***To change the local settings***

1. On the Web Interface home page, click **Settings**.
2. Configure the settings as required.
3. Click **Save** for the changes to take effect.

## Chapter 2: Web Interface Basics

### Administrative Tasks Overview

The Web Interface home page displays the categories of administrative tasks supported by the Web Interface. The same categories are displayed along the upper part of the Web Interface pages. Click a category to perform the following administrative tasks:

- **Directory Management.** Management of Active Directory objects

The **Settings** item is used to set up the Web Interface options. The **Help** item is used to display Web Interface Help and technical information on the Web Interface. The **Logout** option is used to disconnect your Web Interface session.

### Directory Management

**Directory Management** allows you to administer directory objects in your organization. Your ActiveRoles Server permissions determine which tasks you can perform.

**Directory Management** includes the following tasks:

- **Active Directory.** Select and administer Active Directory objects such as user accounts, groups and contacts.
- **Search.** Search for directory object.

For information on how to administer Active Directory objects, see “Managing Active Directory Objects” later in this document.

For information on how to perform a search, see “Searching for Objects” later in this chapter.

### Settings

By using **Settings** you can specify:

- Number of items the Web Interface displays per page in lists of directory objects.
- Number of pages the Web Interface retrieves from the Administration Service at one time when preparing lists of objects.

The settings are saved on the local computer (the computer running the Web browser).

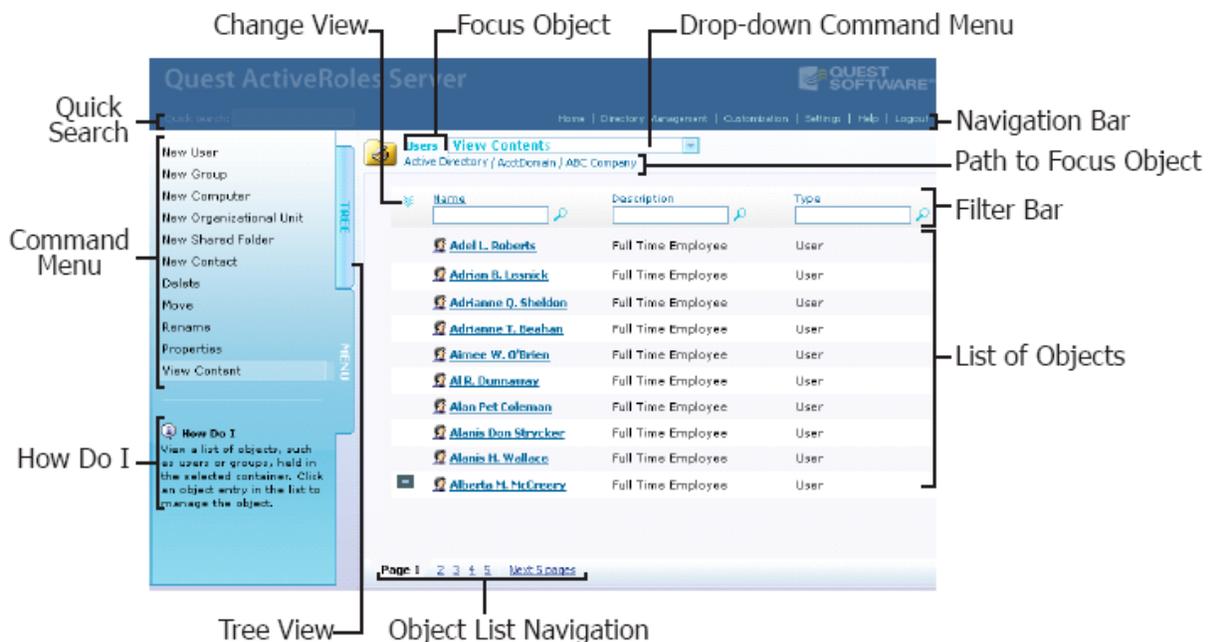
### Help

Web Interface Help answers questions related to the ActiveRoles Server Web Interface, and helps users to complete tasks with the Web Interface.

## User Interface Overview

### User Interface Overview

The Web Interface provides a number of features to lower the level of expertise needed to perform administrative tasks. The following figure provides a brief overview of the user interface components.



### Navigation Bar

Use this area to navigate through administrative tasks supported by the Web Interface. The Navigation Bar includes these items:

- **Home.** Displays the Web Interface home page.
- **Directory Management.** Lets you perform management tasks on directory data.
- **Settings.** Lets you view or modify settings that control the display of the Web Interface.
- **Help.** Provides access to Web Interface Help.
- **Logout.** Logs you off from the Web Interface, closing the Web session.

## Path to Focus Object

Identifies the directory path to the object you are administering. Click the name of any object in the path to display the Command Menu for that object.

## Focus Object

Displays the name of the object you are administering. An icon next to the object name identifies the object type.

## Command Menu

Displays a list of commands relating to the object you are administering. If the Tree View is displayed in place of the Command Menu, click the **MENU** tab to access the Command Menu area.

**NOTE:** *Your server permissions determine which commands are available. The Command Menu only includes the commands for which you have sufficient permissions defined on the selected object Administrators can customize the Command Menu by adding and removing commands.*

## Drop-down Command Menu

Duplicates the list of commands found in the Command Menu area. You can select commands from that list when the Tree View is displayed in place of the Command Menu.

## Tree View

Click the TREE tab to display the Tree View in place of the Command Menu. Intended for locating directory data, this view allows you to navigate through hierarchical structures of data containers, making the location of the data easily discoverable.

## How Do I

Describes the selected command and explains how to use it. Another form of user assistance is ToolTips. A Tooltip provides additional help about a particular interface element, such as a text box, check box, or button. A Tooltip is displayed when you point to an interface element.

## Quick Search

Allows you to search for objects whose names begin with the letters you type. Quick Search searches all domains registered with ActiveRoles Server (managed domains).

## List of Objects

Displays a list of objects in the directory folder you have selected. In the list, click an object to display the Command Menu for that object.

*The Web Interface only lists the objects you are permitted to administer with ActiveRoles Server.*

## Filter Bar

Lets you filter object lists by the value of an object property. For information on how to filter object lists, see “Sorting and Filtering Lists of Objects” later in this chapter.

## Change View

Lets you add and remove columns in object lists. For information on how to choose columns, see “Choosing Columns in Lists of Objects” later in this chapter.

- **Filter On/Off.** Lets you toggle the Filter Bar on/off.
- **Choose Columns.** Allow you to add or remove columns from the list. For more information, see “Choosing Columns in Lists of Objects” later in this chapter.
- **Show All Objects.** If a filter is applied using the Filter Bar, turns the filter off so as to display all items found in the list.
- **Save to File.** Saves the list of search results to a file.

## Object List Navigation

Lets you navigate through pages in the object list. Click the page numbers to display objects not shown on the current page.

The following picture gives an overview of additional interface elements used to carry out commands, such as the **Properties** command.

The screenshot displays the Quest ActiveRoles Server web interface. At the top, the header reads 'Quest ActiveRoles Server' and 'QUEST SOFTWARE'. Below the header, there is a navigation bar with links: Home | Directory Management | Customization | Settings | Help | Logout. The main content area is titled 'Adel L. Roberts' and 'General Properties'. A left sidebar contains a 'COMMANDS' menu with options: Disable Account, Reset Password, Delete, Deprovision, Move, Copy, Rename, Member Of, Change History, User Activity, General Properties (selected), Terminal Services Properties, and Dial-in Properties. The 'General Properties' tab is active, showing a list of tabs: General, Address, Account, Telephone, Organization, Profile, Managed Resources, and Object. The 'General' tab is selected, displaying the following fields: First name: Adel, Last name: Roberts, Initials: (empty), Display name: Adel Roberts, Description: Full Time Employee, Office: Building 51, Floor 15, Cube 154, Telephone number: (257) 952-6541, Other telephone numbers: (empty), E-Mail: ARoberts@company.com, Web page: http://www.abc.com/, and Other web pages: (empty). At the bottom of the form are 'Save' and 'Exit' buttons. A 'Command Page' label points to the main form area.

## Tabs

Click a tab to view and modify a group of object properties.

## Command Page

Lets you supply information required to carry out the command. To apply the changes you have made in the Command Page area, click the **Save** button.

## Changing View

### Sorting and Filtering Lists of Objects

The Web Interface allows you to filter and sort object lists to simplify searching for objects. You can also save object lists to a file.

#### *To sort a list of objects by name*

Click the **Name** column heading once or twice to sort the object list by name in ascending or descending order. An arrow next to the **Name** heading indicates the sort order.

You can sort object lists by any indexed property. The columns headings for such properties are underlined. Click any underlined heading to change the sort order. For information on how to add columns or remove, see “Choosing Columns in Lists of Objects” later in this chapter.

#### *To filter a list of objects*

1. Point to the arrow on the left of the **Name** column heading, and then click **Filter On** to display the Filter bar.
2. In the text box under a column heading, type a few characters, and then press ENTER.

As a result, the list only includes objects that match the filtering criteria. For example, when you fill in the box under the **Name** column heading, the list only includes objects whose names begin with the characters you typed.

Note: Filtering object lists by object type requires that the object type be fully specified in the **Type** filter box. For example, to display all contacts, you must specify “contact”, not “cont” or “cont\*\*”.

You can hide the Filter bar by pointing to the arrow next to the **Name** column heading, and then clicking **Filter Off**.

#### *To save a list of objects to a file*

1. Point to the arrow on the left of the **Name** column heading, and then click **Save to File**.
2. In the **File Download** dialog box, click **Save**. In the **Save As** dialog box specify file's path and name, and click **OK**. By default, the object list is saved to the report.csv file.

### Choosing Columns in Lists of Objects

#### *To display or hide columns in a list of objects*

1. Point to the arrow on the left of the **Name** column heading, and then click **Choose Columns**.

2. To display a column for a certain property of an object type, select the object type (e.g. User, Group...), then click the property name in the **Hidden Columns** list, and then click **Add**.
3. To hide a column for a certain property, click the property name in the **Displayed Columns** list, and then click **Remove**.

## Searching for Objects

### Quick Search

The Web Interface supports a quick search for objects.

#### *To perform a quick search*

In **Quick Search**, type a few characters, and then press ENTER.

*The Web Interface searches for objects whose names begin with the characters you typed, and displays a list of search results.*

Quick Search searches all the ActiveRoles Server managed domains regardless of which object you are currently managing.

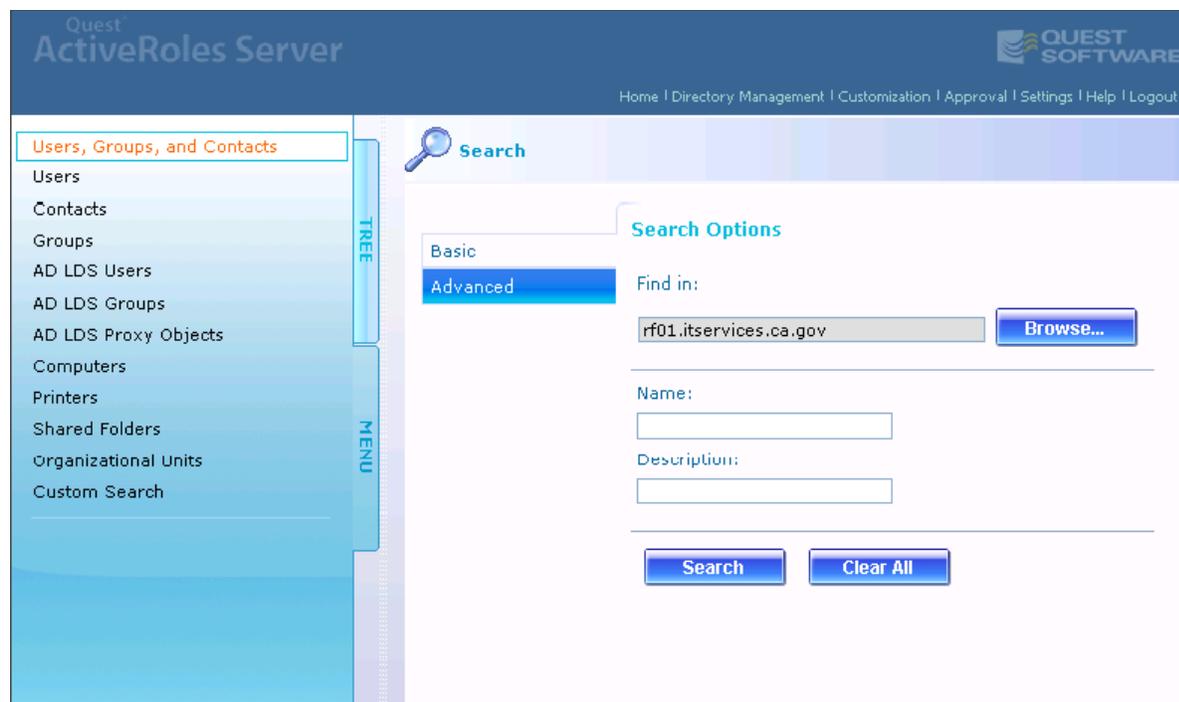
In the search results list, when you click a leaf object such as a user or group, the Web Interface displays the form to view and modify object properties.

In the search results list, when you click a container object such as an Organizational Unit, the Web Interface displays a list of objects in that container.

The search results list only includes objects for which you have permissions defined in ActiveRoles Server.

## Basic Search

The Web Interface includes search pages to locate objects of a certain type. The following picture shows the **Search for Users, Groups, and Computers** page in Basic Search mode.



### To perform a Basic Search

1. Point to **Directory Management**, and then click **Search** on the **Directory Management** menu.
2. In the Search Category area, click the type of objects for which you want to search.
3. Next to the **Find in** box, click **Browse** to choose the domain, directory folder, or Managed Unit you want to search.
4. Use the text and check boxes on the **Basic Search** tab to specify your search criteria.
5. Click **Search**.

The search results list is displayed at the bottom of the page.  
You can hide or display the Search Options area by clicking **SearchOptions**.

In the search results list, you can do the following:

- Click a leaf object such as a user or group, to display the page to view and modify object properties.

- Click a container object such as an Organizational Unit, to view a list of objects that are in that container.
- Click the **Name** column heading to change the sort order of the listed objects.
- Add and remove columns to be displayed (see “Choosing Columns in Lists of Objects” earlier in this chapter).
- Set a filter to display only the objects you need (see “Sorting and Filtering Lists of Objects” earlier in this chapter).
- Click the page numbers at the bottom of the list to display additional pages whenever the entire list of items does not fit in one page.

## Advanced Search

In Advanced Search mode, the Web Interface retains all the characteristics of Basic Search mode. In addition, Advanced Search mode allows you to search for objects by additional properties.

### *To perform an Advanced Search*

1. Point to **Directory Management**, and then click **Search** on the **Directory Management** menu.
2. In the Search Category area, click the type of objects to search for.
3. In the Search Mode area, click the **Advanced Search** tab.
4. Next to the **Find in** box, click **Browse** to choose the domain, directory folder, or Managed Unit to search.
5. From the **Field** list, select the object property by which you want to search.
6. From the **Condition** list, select an operator to further define the search.
7. In the **Value** box, type the variable to use.
8. Click **Add**.
9. Repeat Steps 4–8 until you have entered all the search criteria.
10. Click **AND** or **OR**, depending on whether you want to find objects that match all the search criteria or at least one of them.
11. Click **Search**.

*The search results list is displayed at the bottom of the page.*

*You can hide or display the Search Options area by clicking **SearchOptions**.*

## Custom Search

The Web Interface also provides a powerful Custom Search, which combines search criteria for different objects into one search query, and enables an Advanced Search using an LDAP query.

### *To perform a Basic Custom Search*

1. Point to **Directory Management**, and then click **Search** on the **Directory Management** menu.
2. In the Search Category area, click **Custom Search**.
3. Next to the **Find in** box, click **Browse** to choose the domain, directory folder, or Managed Unit to search.
4. Next to the **Field** label, click the type of objects you want to search for, and then, from the list next to the object type label, select the object property by which you want to search.
5. From the **Condition** list, select an operator to further define the search.
6. In the **Value** box, type the variable to use.
7. Click **Add**.
8. Repeat Steps 3–7 until you have entered all the search criteria.
9. Click **AND** or **OR** depending on whether you want to find objects that match all the search criteria or at least one of them.
10. Click **Search**.

*The search results list is displayed at the bottom of the page.*

### *To perform an Advanced Custom Search*

1. Point to **Directory Management**, and then click **Search** on the **Directory Management** menu.
2. In the Search Category area, click **Custom Search**.
3. Click the **Advanced Search** tab.
4. Next to the **Find in** box, click **Browse** to choose the domain, directory folder, or Managed Unit to search.
5. In the **Enter LDAP query** box, type a query that meets the Lightweight Directory Access Protocol (LDAP) standard.
6. *For example, to find an object by name, type (cn=<name>), where <name> is the object's common name.*

7. Click **Search**.

*The search results list is displayed at the bottom of the page.*

The Search Results list only includes the objects for which you have permissions defined in ActiveRoles Server.

## Chapter 3: Performing Management Tasks

### Managing Active Directory Objects

A user's ability to perform a certain management task depends on the permissions granted to the user's account, and on the customization of the Web Interface. The general procedure for performing an administrative task is as follows.

#### *To perform a management task*

1. Open your Web browser and connect to the Web Interface.
2. On the Web Interface home page, click **Directory Management**.

*This displays the Active Directory domains to which your account has permissions assigned for administration.*

3. Click on the Rf01 domain, Exchange Mailbox Customer then your department Organizational Unit (OU), and then select the Linked Mailboxes, Resource Mailboxes or Groups OU depending upon what type of Exchange object you will be creating or managing.
4. In the List of Objects area, click the particular command to create that object in the OTech Rf01 Exchange Mailbox domain.

In the List of Objects area, clicking a leaf object such as a user or group displays a page to view or modify object properties; clicking a container object such as a domain or Organizational Unit displays a list of objects in that container.

5. In the Command Menu area, click the command you want to use.
6. Complete the operation. For information about the command you select, see Command Help beneath the Command Menu.

When performing management tasks, the Web Interface supplements and restricts the user input based on administrative policies and permissions defined in ActiveRoles Server. The Web Interface displays property values generated according to the policies, and prohibits the input of data that breaks the policy constraints. Thus, the Web Interface exhibits the following behavior:

- If a policy requires that a value be specified for a certain property (required property), that property is marked with an asterisk (\*).
- If a policy affects a certain property, then the special icon is displayed next to the field for that property. Click the icon to display policy information, which you can use to enter an acceptable value.
- When you specify a property value that breaks policy constraints and click **Finish** or **Apply**, an error message is displayed. If you are creating an object, click **Back** to return to the page with incorrect values and examine the error message. Then, correct your input for the Web Interface to accept the value. If you are modifying an object, examine

the error message and correct your input.

- The forms used for creation of an object must include the fields to specify all required properties. Otherwise, the Web Interface fails to create the object.
- The forms used for object modification display only the values of properties for which you have Read permission. Likewise, these forms only allow you to modify a property value if you have Write permission for that property.

*Note: If you do not have permission to modify a certain property, the Web Interface dims out the field for that property and prevents you from modifying the property.*

- The Command Menu only includes the commands that you are permitted to use. The List of Objects and Search Results areas only display objects for which you have permissions defined in ActiveRoles Server.

***These permissions are defined as Access Roles, which are defined in the next section.***

## Definition of Access Roles

The role defined for OTech customers is **Remote Admin**.

### Remote Administration (Rf01)

This role is assigned to top-level administrators for each Department OU (Organizational Unit).

**Remote Admin** can perform the following tasks:

- Users - Create Mailbox accounts
- Users – Deprovision Mailbox accounts
- Users – Delete Mailbox accounts
- Users – Modify Mailbox account personal data
- Users – Read/Write Account Name (UPN Prefix)
- Users – Read/Write sAMAccountName
- Users – Read/Write Logon Name
- Users – Read/Write Display Name
- Contacts – Create Mail-enabled Contact
- Contacts – Delete Mail-enabled Contact
- Groups – Full Control
- Exchange – Manage Mailbox account E-mail addresses
- Exchange - Manage Contacts E-mail addresses
- Exchange – Read/Write Custom Attributes
- Exchange – Read/Write Forwarding Address
- Exchange – Read/Write Mailbox Storage Limits
- Exchange – Read/Write Send on Behalf Permissions
- Users – Rename
- Users – Read/Write Organizational Information

OTech ActiveRoles Server Administrators can customize the Web Interface by adding and removing commands, and modifying forms associated with commands.

A list of Active Directory domains that can be administered with the Web Interface is part of the ActiveRoles Server configuration. (Such domains are referred to as *managed domains*.) For a domain to belong to that list, the domain must be registered with ActiveRoles Server. Administrators can register domains using the ActiveRoles Server console.

## Logon Instructions for ECAT (Exchange Customer Administration Tool)

1. Start Microsoft Internet Explorer
2. In the Address field, type **https://ECAT.mail.ca.gov/Admin**
3. Press **ENTER**

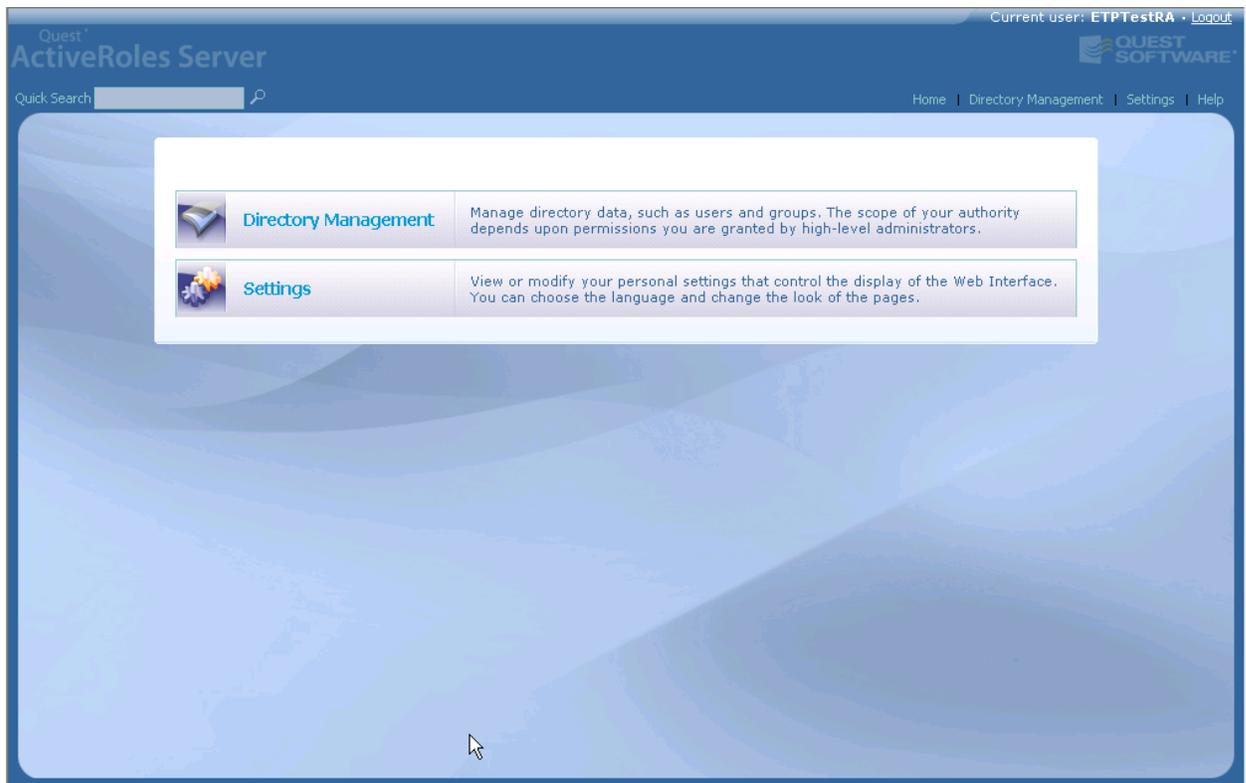
You will be prompted by the following login screen:



4. Type login information  
**User name:** Rf01\AdmFirstInitialLastname  
**Password:** (Sent by email after taking class)
5. Click **OK**

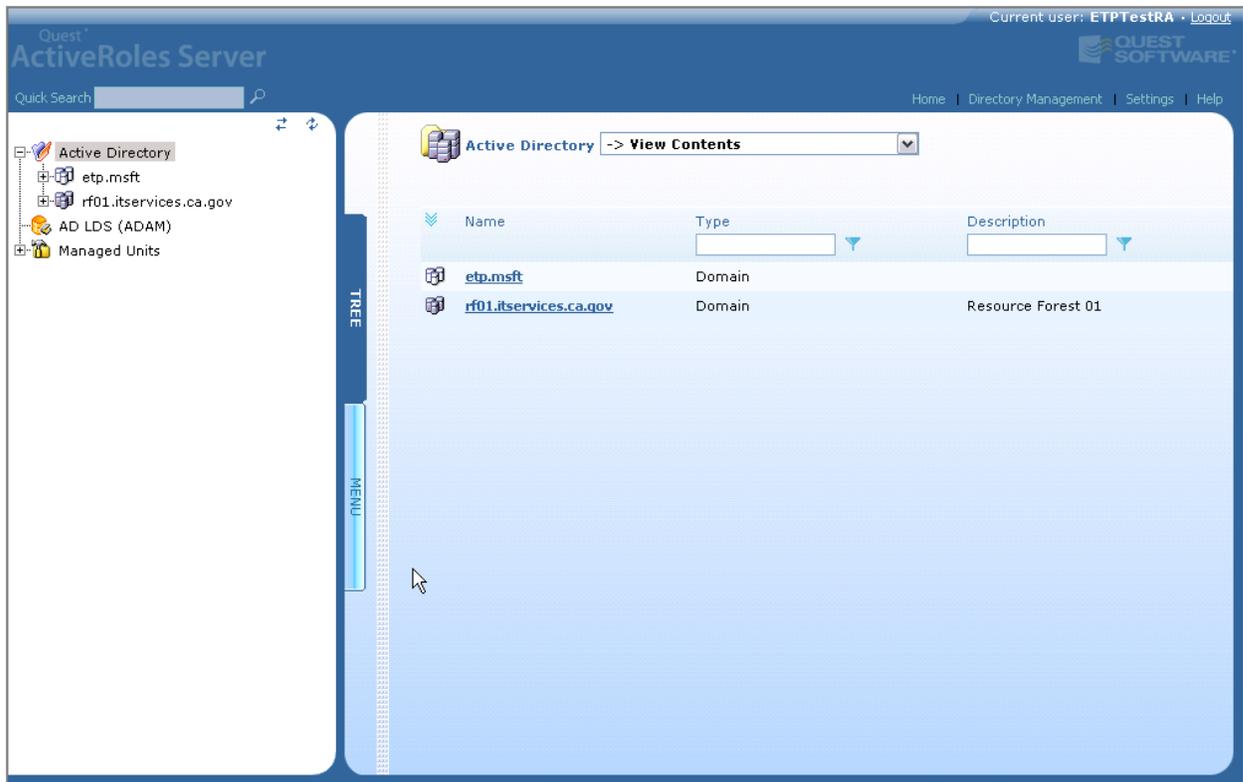
The Web Interface home page will display similar to the following figure:

Select **Directory Management** to perform all administration functions.



## Create a New User Mailbox (Linked Mailbox)

From the Active Directory web screen, select the **rf01.itservices.ca.gov** which is the OTech domain where the Exchange mailbox accounts and objects reside.



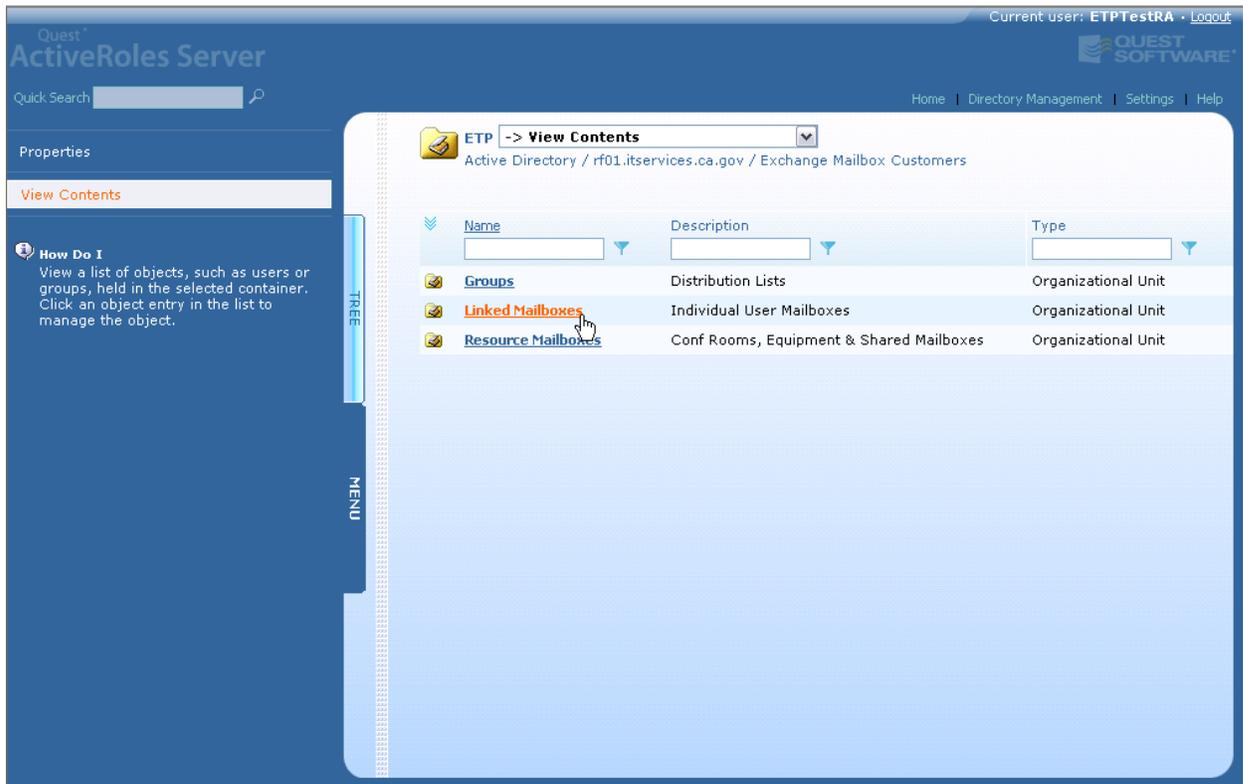
In the left column, in the **Tree View**, expand down through the rf01.itservices.ca.gov/ Exchange Mailbox Customers/ *Department* (e.g., ETP). Then select the **Menu Bar**.

The screenshot displays the Quest ActiveRoles Server web interface. On the left, the **Tree View** shows a hierarchical structure of Active Directory objects. The path is expanded to: Active Directory > etp.msft > rf01.itservices.ca.gov > Exchange Mailbox Customers > ETP. A **MENU** bar is visible at the bottom of the tree view, with a mouse cursor hovering over it.

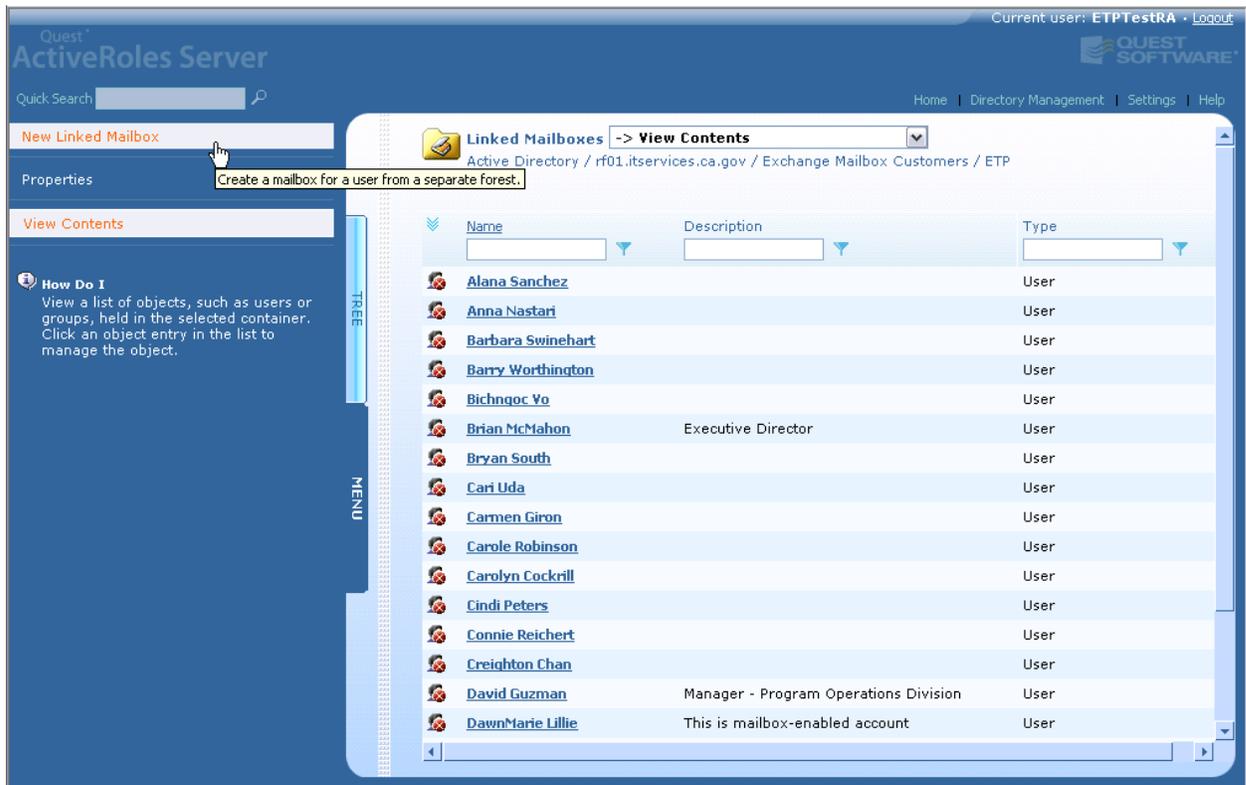
The main content area shows the **View Contents** page for the selected path: Active Directory / rf01.itservices.ca.gov / Exchange Mailbox Customers. It features a table with the following data:

Name	Description	Type
<a href="#">Groups</a>	Distribution Lists	Organizational Unit
<a href="#">Linked Mailboxes</a>	Individual User Mailboxes	Organizational Unit
<a href="#">Resource Mailboxes</a>	Conf Rooms, Equipment & Shared Mailboxes	Organizational Unit

Then click the **Linked Mailboxes** OU to start the process of creating a new user mailbox account.



From the Command Menu on the left side of the screen, select the **New Linked Mailbox** command.



The screenshot shows the Quest ActiveRoles Server web interface. The top navigation bar includes the Quest logo, 'ActiveRoles Server', a search bar, and the current user 'ETPTTestRA'. The left sidebar contains a 'Command Menu' with 'New Linked Mailbox' highlighted. A tooltip above it reads 'Create a mailbox for a user from a separate forest.' The main content area shows a tree view of 'Linked Mailboxes' for the path 'Active Directory / rf01.itsservices.ca.gov / Exchange Mailbox Customers / ETP'. Below this is a table of linked mailboxes.

Name	Description	Type
<a href="#">Alana Sanchez</a>		User
<a href="#">Anna Nastari</a>		User
<a href="#">Barbara Swinehart</a>		User
<a href="#">Barry Worthington</a>		User
<a href="#">Bichngoc Vo</a>		User
<a href="#">Brian McMahon</a>	Executive Director	User
<a href="#">Bryan South</a>		User
<a href="#">Cari Uda</a>		User
<a href="#">Carmen Giron</a>		User
<a href="#">Carole Robinson</a>		User
<a href="#">Carolyn Cockrill</a>		User
<a href="#">Cindi Peters</a>		User
<a href="#">Connie Reichert</a>		User
<a href="#">Creighton Chan</a>		User
<a href="#">David Guzman</a>	Manager - Program Operations Division	User
<a href="#">DawnMarie Lillie</a>	This is mailbox-enabled account	User

Populate the fields for **First name:** and **Last name:** (**Middle Initial** may be used as needed for a tiebreaker in the probability of duplicates).

The screenshot displays the 'New Linked Mailbox' configuration page in the Quest ActiveRoles Server web interface. The page is titled 'New Linked Mailbox' and shows a breadcrumb trail: 'Active Directory / rf01.itservices.ca.gov / Exchange Mailbox Customers / ETP / Linked Mailboxes'. The 'Steps to complete' section lists 'General', 'Account', 'Mailbox Settings', and 'Master Account', with 'General' selected. The form contains the following fields:

- First name: (empty text input)
- Last name: (empty text input)
- Initials: (empty text input)
- Name: (empty text input with a search icon)
- Display name: (empty text input with a search icon)
- User logon name: (text input containing '@rf01.itservices.ca.gov' with a dropdown arrow and a search icon)
- \*User logon name (pre-Windows 2000): (text input containing 'RF01\')

At the bottom of the form, there is a message 'To continue, click Next.' and two buttons: 'Next' and 'Exit'.

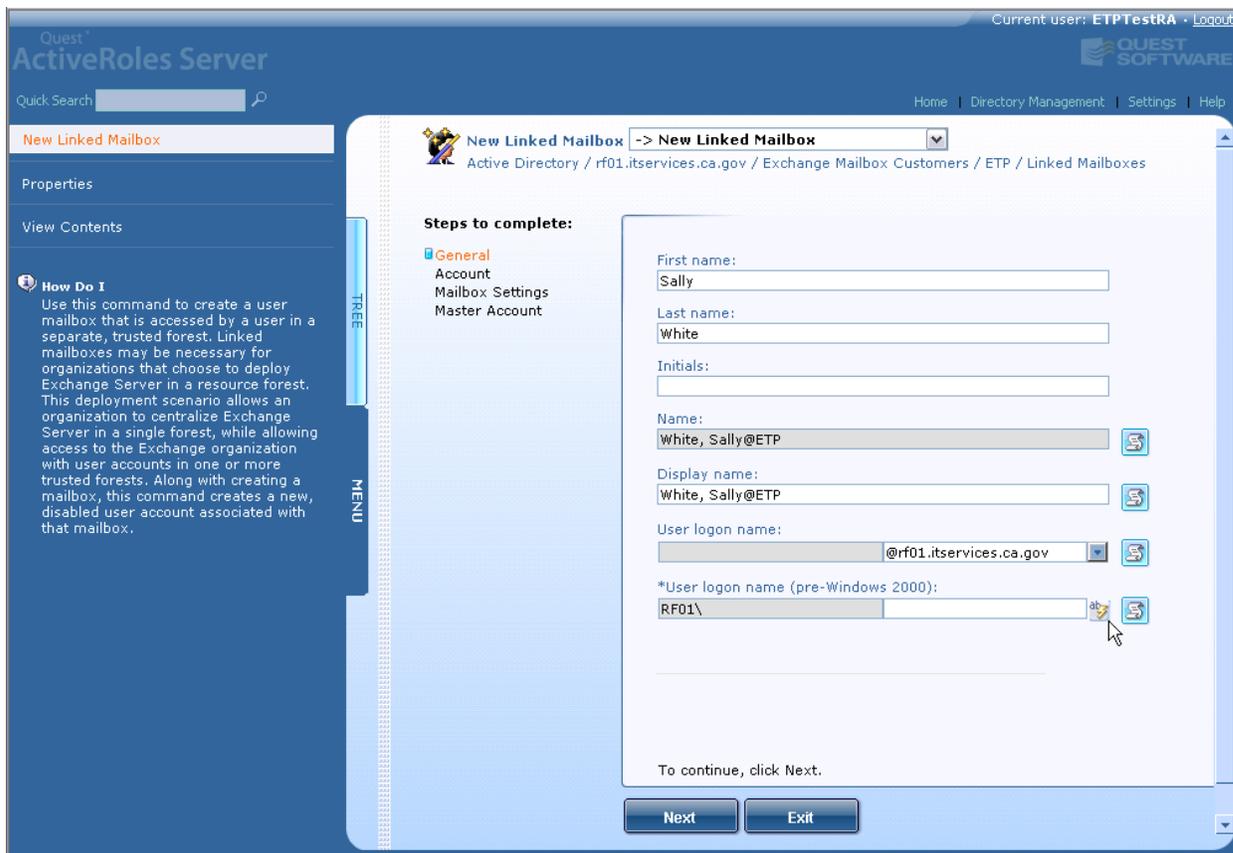
**IMPORTANT:** OTech ECAT policies auto-populate these fields: **Name**, **Display name** and **Department**

**Name:** – This field is used to populate the AD object name and the Display name which shows in the Global address List. (e.g., Lastname, Firstname@*Department*).

**Department:** – This field is used by OTech for billing and configuring address lists views within the Global address list.

**Mailbox Alias and User-logon names:** – ECAT scripts auto generate these fields for uniqueness in the Exchange Resource Forest (Rf01).  
(e.g., DepartmentFirstnameLastname, DepartmentFirstnameMiddleInitialLastname, or if no Middle Initial, then DepartmentFirstInitialLastname)

Select the icon  to Auto Generate the **User logon name:** and **\*User logon name (pre-Windows 2000):**



Then click **Next**.

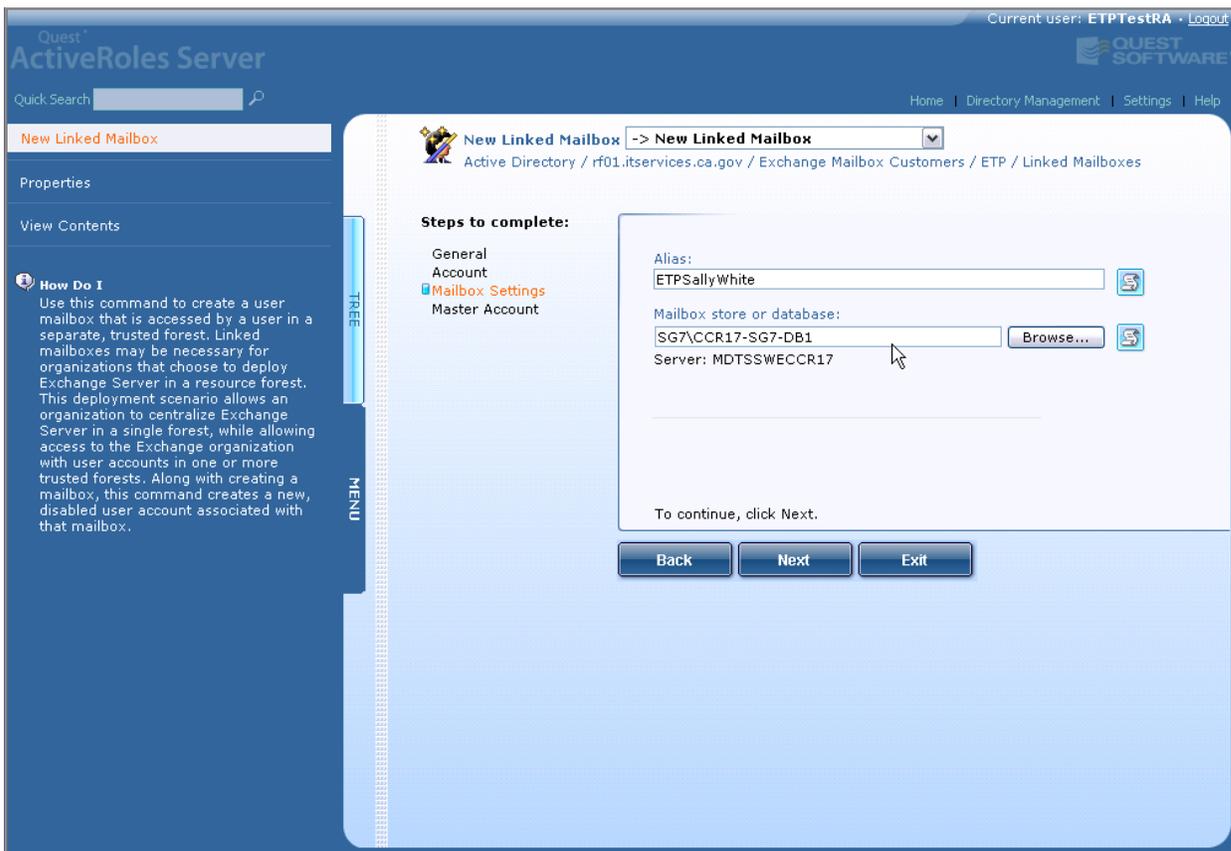
The screenshot displays the Quest ActiveRoles Server web interface. The top navigation bar includes the Quest logo, 'ActiveRoles Server', a search bar, and the current user 'ETPTestRA' with a 'Logout' link. The main content area is titled 'New Linked Mailbox' and shows a breadcrumb trail: 'Active Directory / rf01.itsservices.ca.gov / Exchange Mailbox Customers / ETP / Linked Mailboxes'. A 'Steps to complete:' section lists 'General', 'Account', 'Mailbox Settings', and 'Master Account'. The 'General' step is active, showing a form with the following fields: 'First name' (Sally), 'Last name' (White), 'Initials' (empty), 'Name' (White, Sally@ETP), 'Display name' (White, Sally@ETP), 'User logon name' (ETPSallyWhite @rf01.itsservices.ca.gov), and '\*User logon name (pre-Windows 2000):' (RF01\ ETPSallyWhite). At the bottom of the form, it says 'To continue, click Next.' and there are 'Next' and 'Exit' buttons. A mouse cursor is pointing at the 'Next' button.

Then click **Next** again to bypass the **Account** (Password) screen.

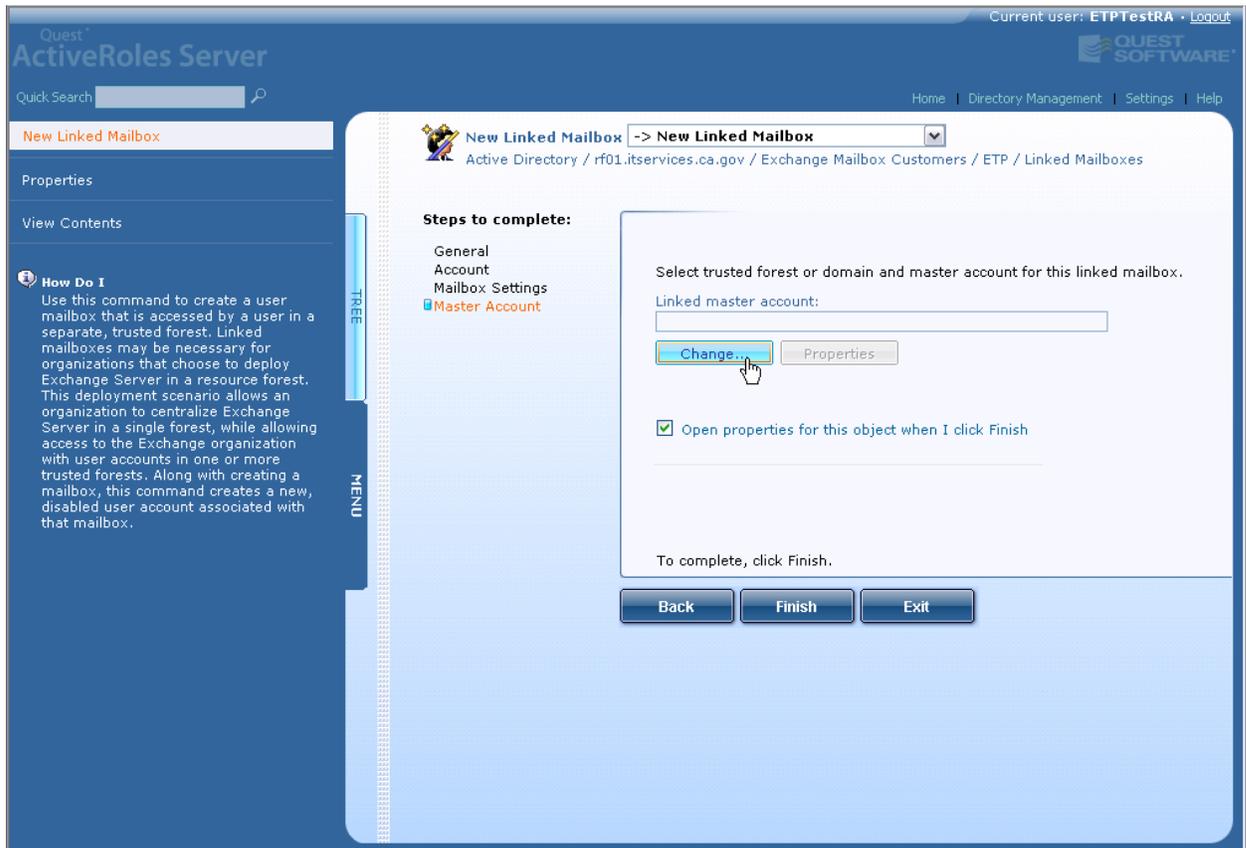
(Mailboxes accounts are disabled user accounts and therefore do **NOT** require a password)

The screenshot displays the Quest ActiveRoles Server web interface. The top navigation bar includes the Quest logo, 'ActiveRoles Server', a search bar, and the current user 'ETPTestRA' with a 'Logout' link. The breadcrumb trail shows the path: Home | Directory Management | Settings | Help. The main content area is titled 'New Linked Mailbox' and shows a dropdown menu set to 'New Linked Mailbox'. Below this, the 'Steps to complete:' section lists 'General', 'Account' (highlighted in blue), 'Mailbox Settings', and 'Master Account'. The 'Account' step is active, showing a 'Password:' field, a 'Confirm password:' field, and buttons for 'Generate', 'Clear', and 'Spell out'. There is also an 'Account options:' section with a checkbox for 'User must change password at next logon'. At the bottom, there are 'Back', 'Next', and 'Exit' buttons. A mouse cursor is pointing at the 'Next' button.

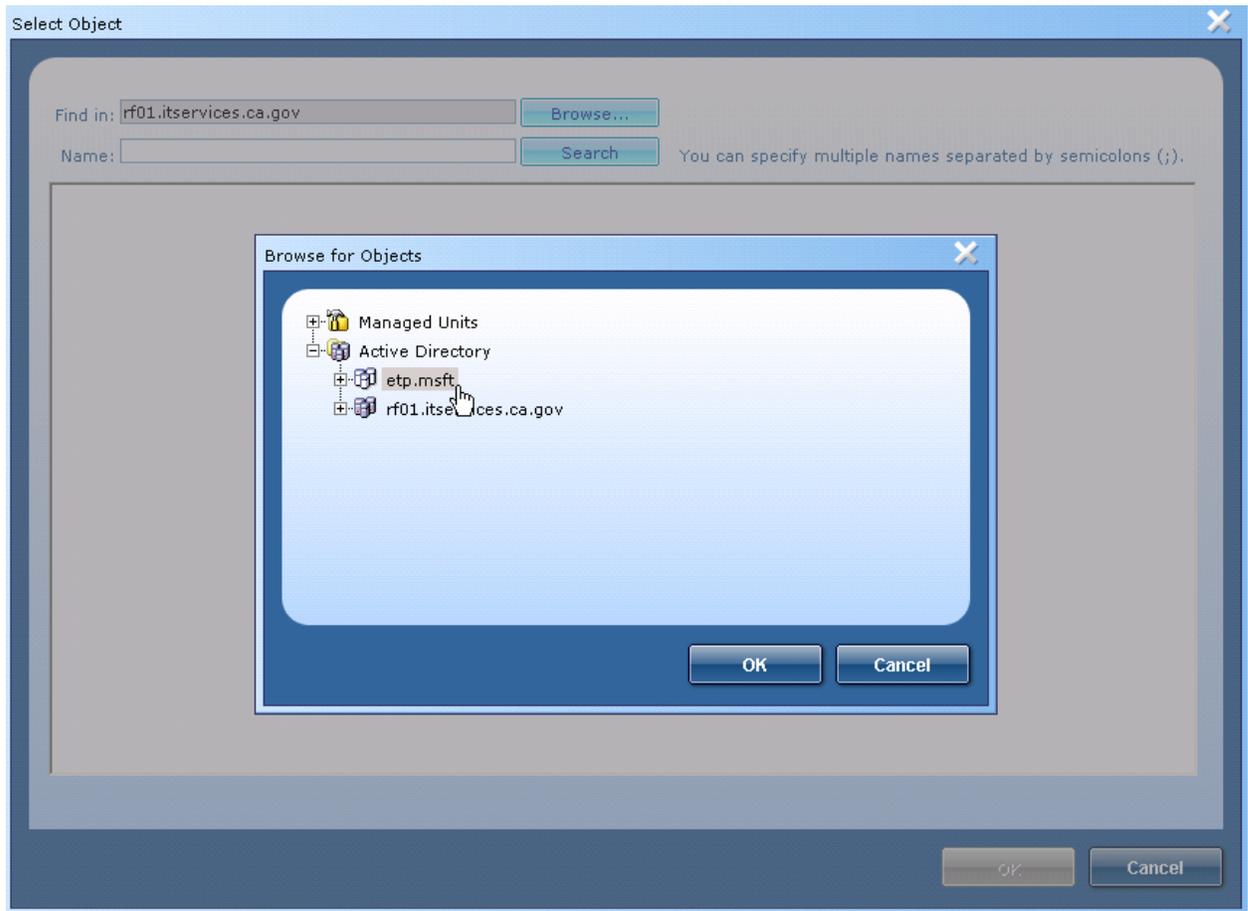
Then click **Next** again. The **Mailbox settings** step shows the **Alias:** and **Mailbox store or database:** of this mailbox and are set automatically through ECAT Policies.



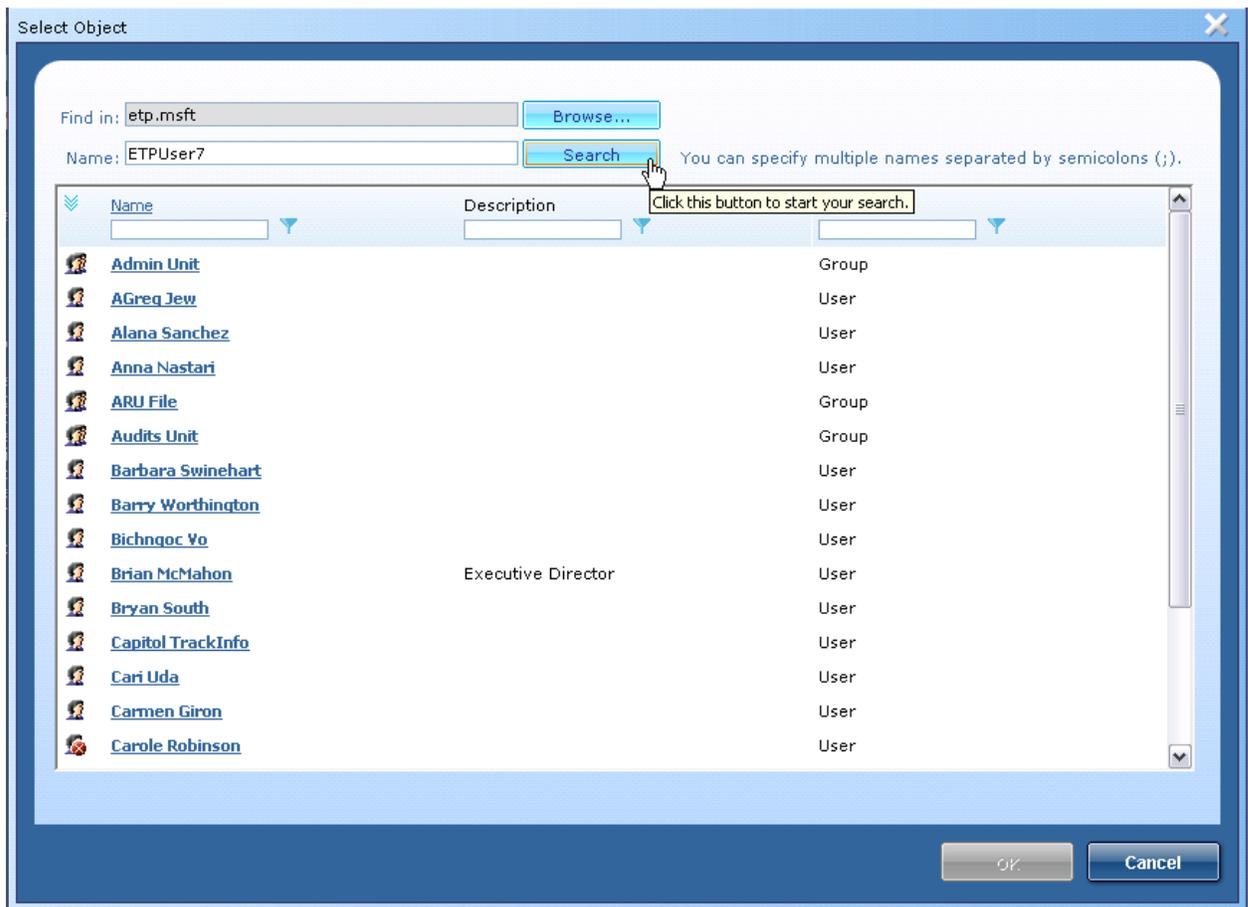
Click the **Change** button to browse for the user account in the customer domain that will be the **Master Account** (AEA – Associated External Account) for this mailbox.



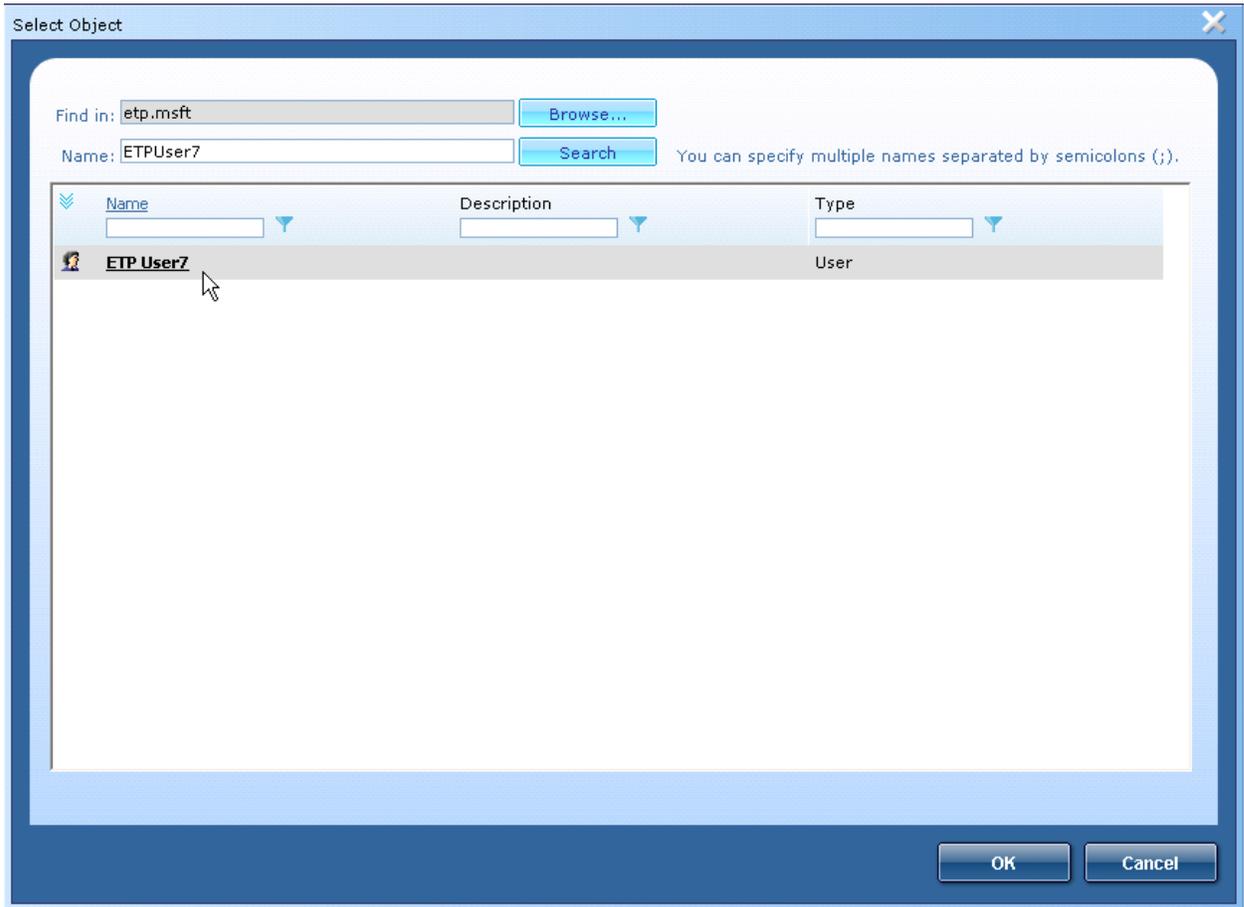
Click the **Browse** button, and then select the customer's domain in the **Browse for Objects** window. This will populate the **Find in:** field to reflect the customer's domain.



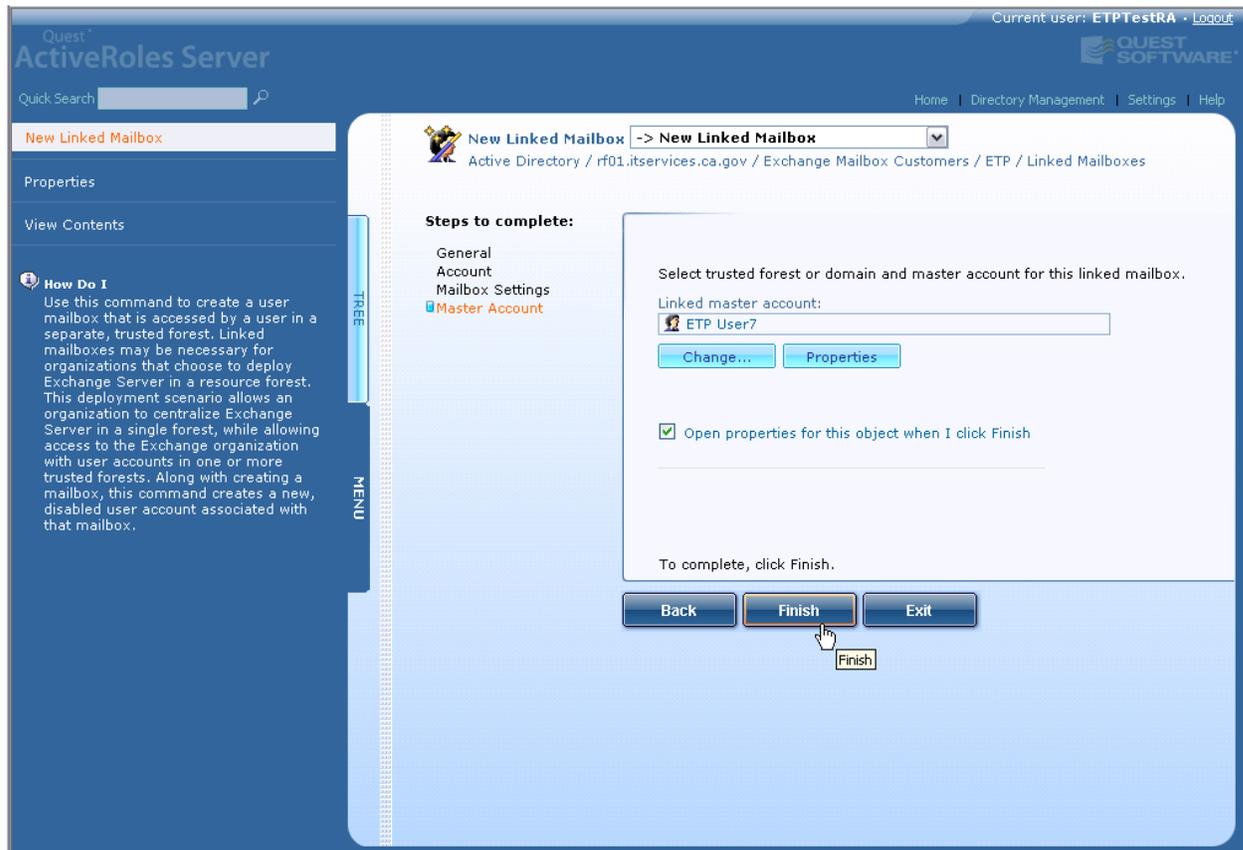
Type the username of the new person in the **Name:** field and then select **Search**.



When the search results come back, select the username and then click **OK**.



This will then populate the **Linked master account** box with the user's domain authentication account as selected in the previous step.



Then click **Finish**.

Upon completion of creating the mailbox in the previous steps, the screen will display the **General Properties** of the new linked mailbox account for the new user.

The screenshot displays the Quest ActiveRoles Server web interface. At the top, it shows the current user as 'ETPTestRA' and the Quest Software logo. A navigation menu on the left includes options like 'Deprovision', 'Member Of', 'Rename', 'Delete', 'General Properties', 'Exchange Properties', 'Managed Resources', 'Change History', and 'Move'. A 'How Do I' section provides instructions on viewing or modifying general properties. The main content area shows a success message: 'The operation is successfully completed.' Below this, the user 'White, Sally@ETP' is selected, and the 'General Properties' page is displayed. The page has a 'TREE' menu on the left with options: 'General', 'Address', 'Account', 'Telephones', 'Organization', 'Profile', 'Managed by', and 'Object'. The 'General' tab is active, showing fields for: First name (Sally), Last name (White), Initials, Display name (White, Sally@ETP), Description, Office, Telephone number, E-Mail (Sally.White@etp.ca.gov), and Web page. 'Save' and 'Exit' buttons are at the bottom.

Fill in your department's required fields into each of the command page tabs—**General**, **Address**, **Organization**, etc. Then click the **SAVE** button, which will save all fields populated within the **General Properties** command page.

After clicking **SAVE** to the **General Properties** changes, select the **Exchange Properties** from the Command menu on left.

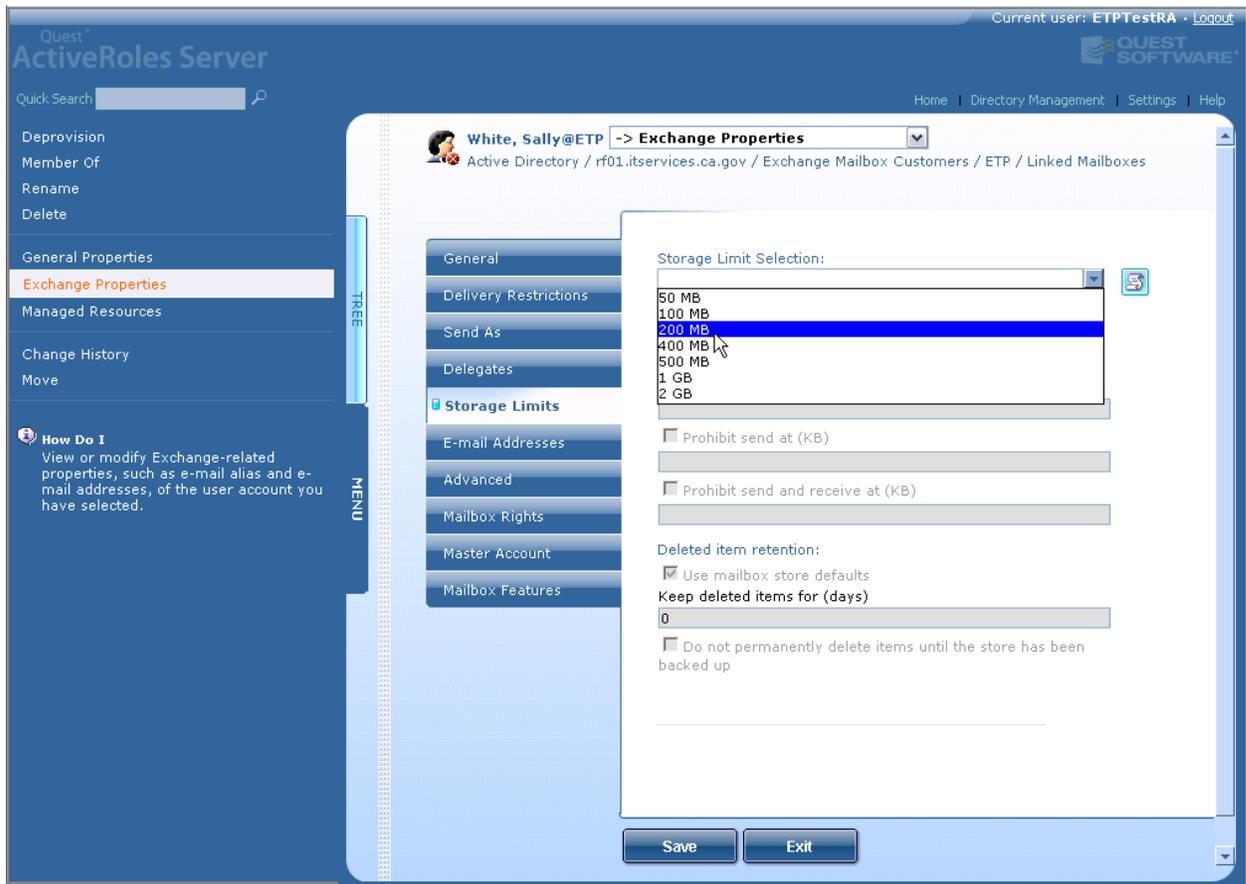
The **General** tab shows the **Alias:**, **Mailbox store or database:** and the **Linked account:** of the user mailbox account.

The screenshot displays the Quest ActiveRoles Server web interface. The top navigation bar includes the Quest logo, 'ActiveRoles Server', a search bar, and the current user 'ETPTestRA'. The left sidebar contains a 'TREE' menu with options like 'Deprovision', 'Member Of', 'Rename', 'Delete', 'General Properties', 'Exchange Properties' (highlighted), 'Managed Resources', 'Change History', and 'Move'. Below this is a 'MENU' section with a 'How Do I' link and a description: 'View or modify Exchange-related properties, such as e-mail alias and e-mail addresses, of the user account you have selected.' The main content area shows the user 'White, Sally@ETP' with a dropdown menu set to 'Exchange Properties'. Below this is a list of property categories: 'General', 'Delivery Restrictions', 'Send As', 'Delegates', 'Storage Limits', 'E-mail Addresses', 'Advanced', 'Mailbox Rights', 'Master Account', and 'Mailbox Features'. The 'General' tab is active, showing a 'Mailbox type: Linked Mailbox' and the following fields: 'Alias: ETPSallyWhite', 'Mailbox store or database: SG7\CCR17-SG7-DB1', and 'Server: MDTSSWECCR17'. The 'Linked account:' field shows 'ETP User7 (etp.msft/ETP Users/Sacramento/ITU\_Test)'. At the bottom of the dialog are 'Save' and 'Exit' buttons.

## Setting the Storage Limit

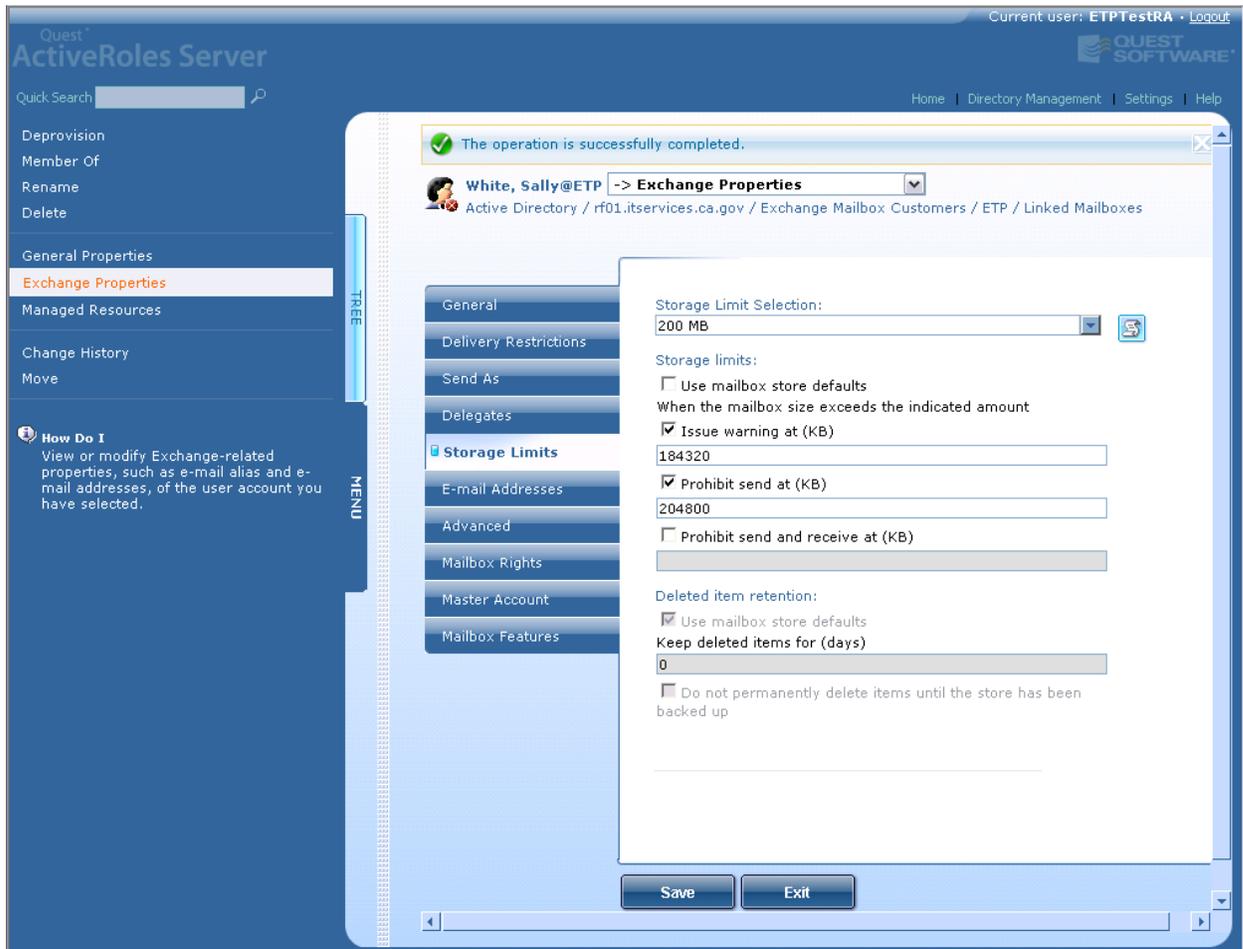
To select the mailbox storage limits, click the **Storage Limits** tab.

Then from the **Storage Limit Selection:** box; use the drop-down to select the mailbox limit required for the new mailbox user.



Example: Select **200 MB**, then click **SAVE**.

Notice that ECAT configures the **Issue warning at (KB)** and **Prohibit send at (KB)** settings automatically and clears the check box for **Use mailbox store defaults**.



**E-mail Addresses** tab displays the **SMTP** address created by Exchange Recipient policies.

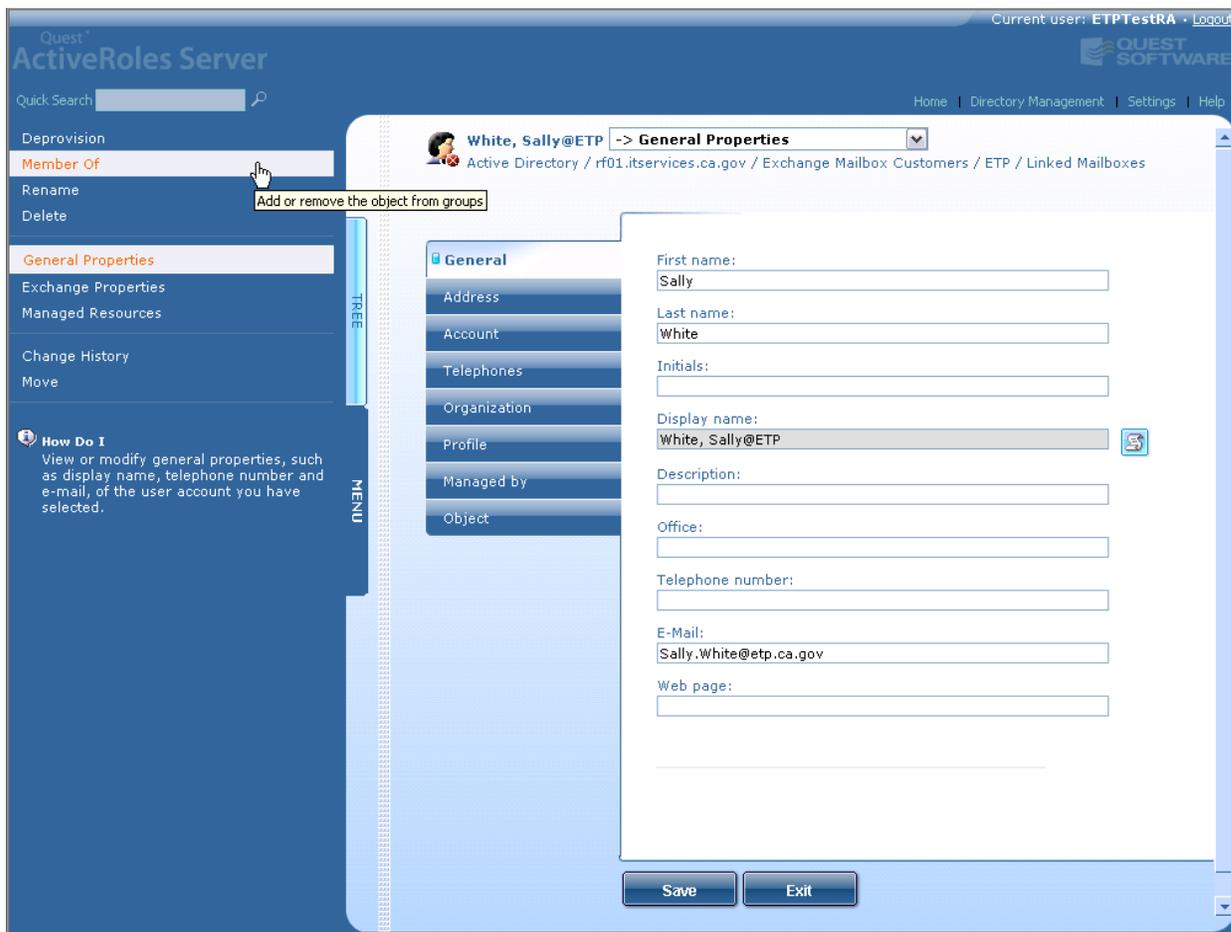
The screenshot shows the Quest ActiveRoles Server web interface. The current user is ETPTSTRA. The interface displays the Exchange Properties dialog for user White, Sally@ETP. The E-mail Addresses tab is selected, showing a table with one SMTP address: Sally.White@etp.ca.gov. The dialog includes buttons for New, Edit, Remove, and Set As Primary, and a checkbox for 'Automatically update e-mail addresses based on recipient policy'.

Type	Address
SMTP	Sally.White@etp.ca.gov

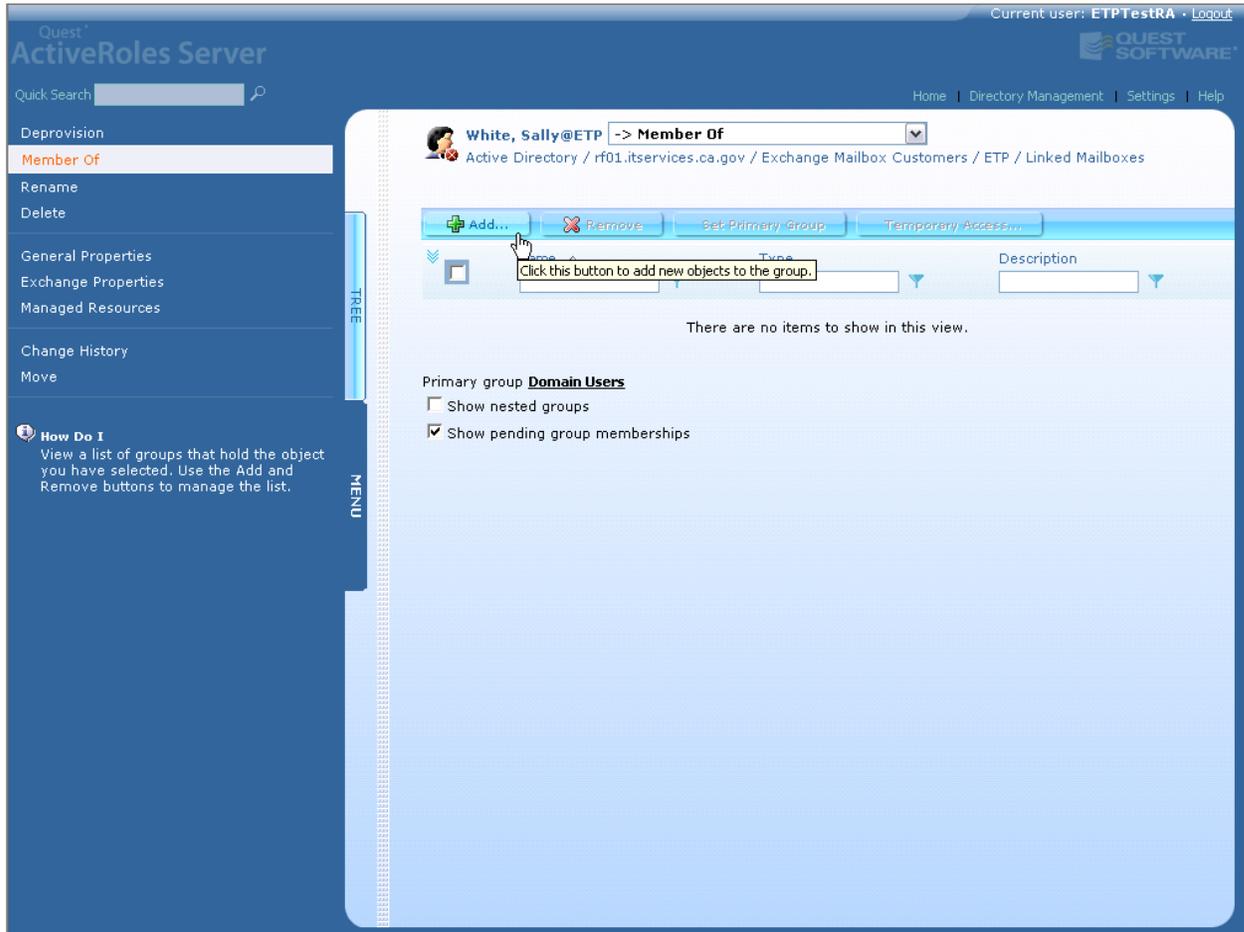
**\*\* Be sure to click the **SAVE** button once all **Exchange Properties** settings have been completed.**

## Adding to a Distribution List

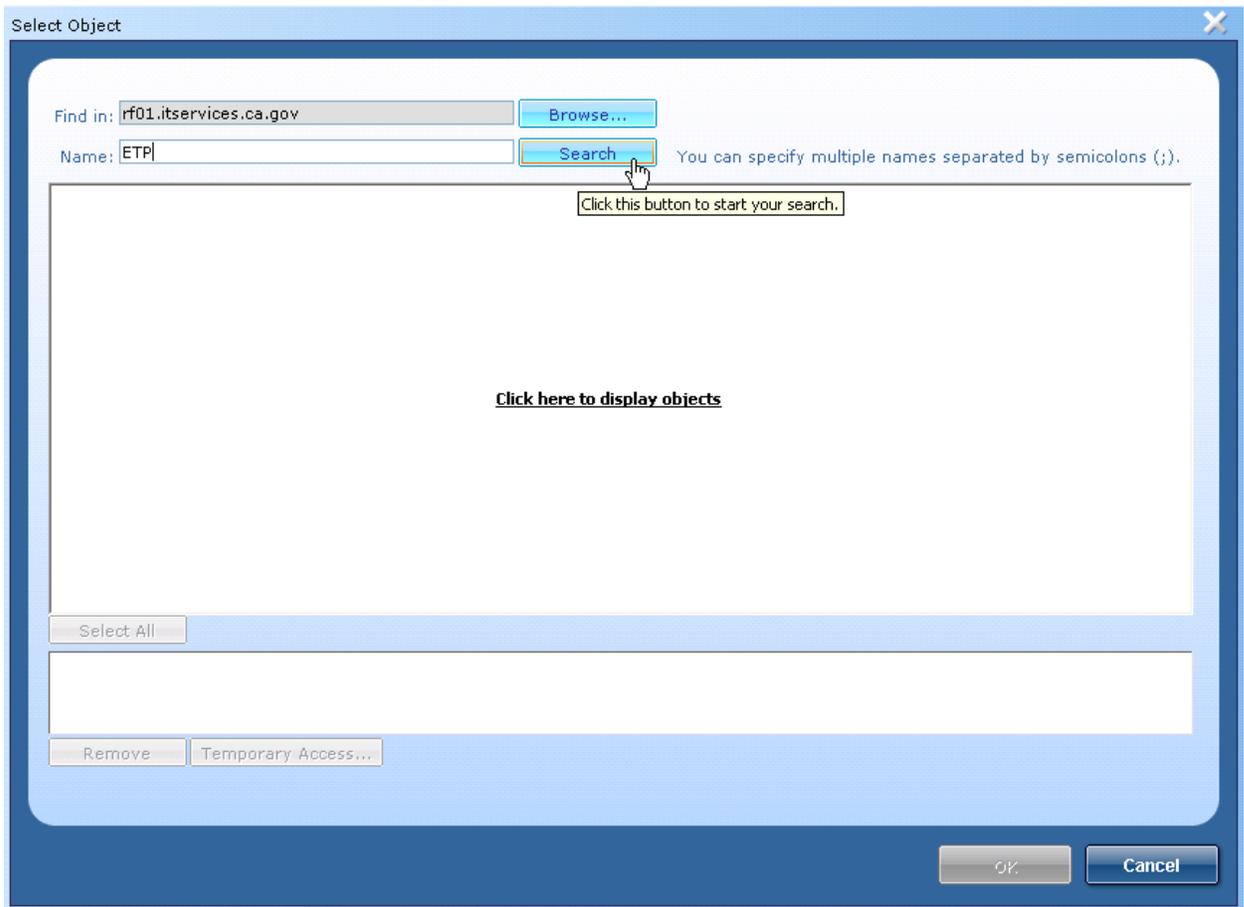
To add the new user's mailbox to Distribution Lists, select the **Member Of** command from the Command Menu on the left side of the screen.



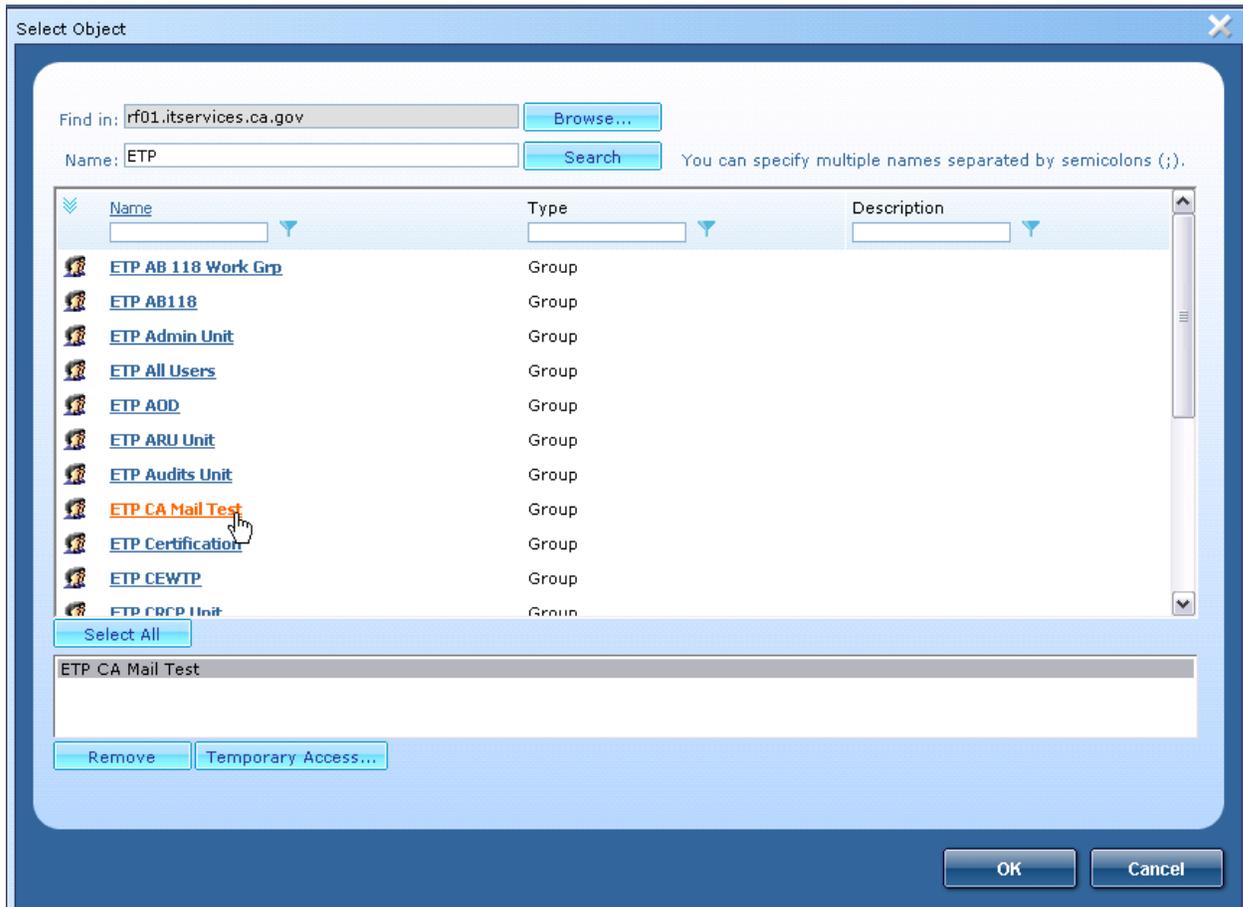
Click the **Add** button.



Type part of the name of Distribution list in the **Name:** field, and then click the **Search** button.



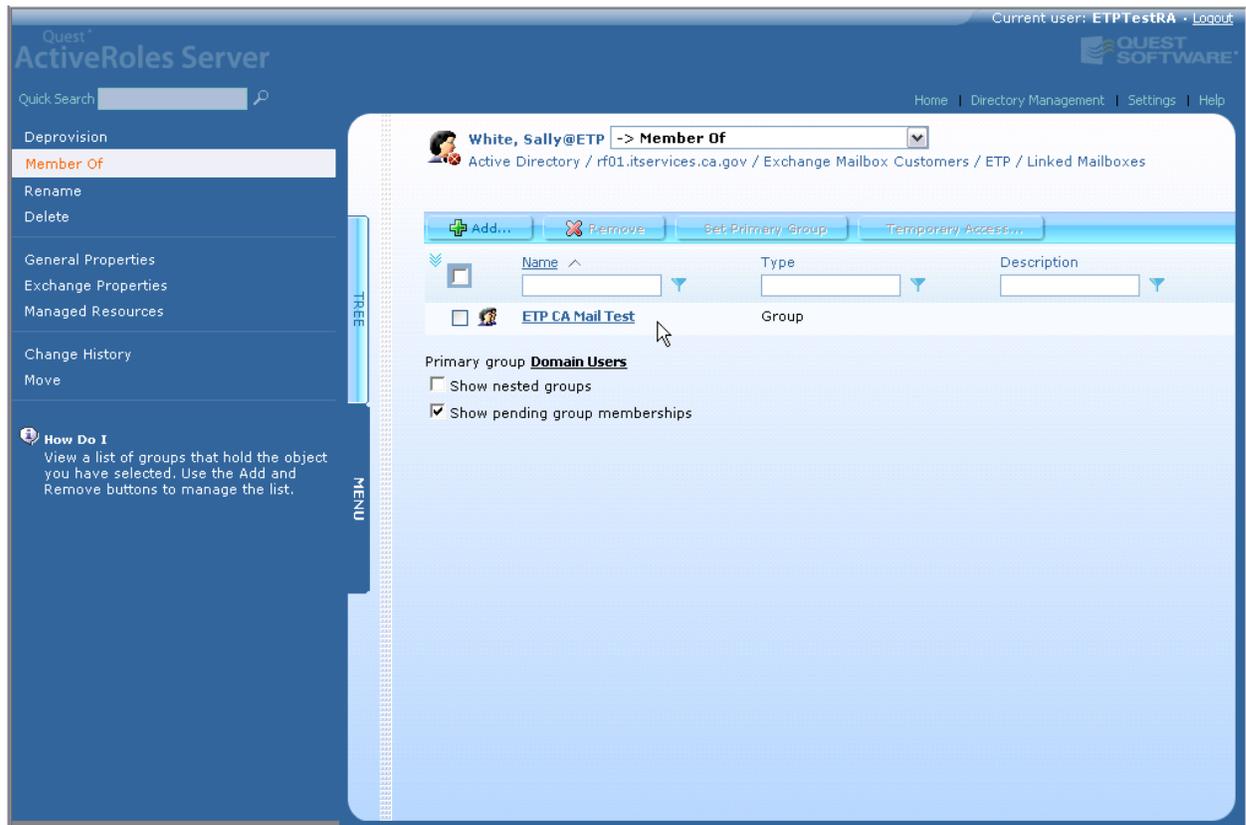
Select the distribution list from the list of results.



The selected distribution list will show at the bottom of screen.

\*\* Repeat process until all needed Distribution Lists have been selected, then click **OK**.

The screen will display the list of Distribution Groups this user is a member of.

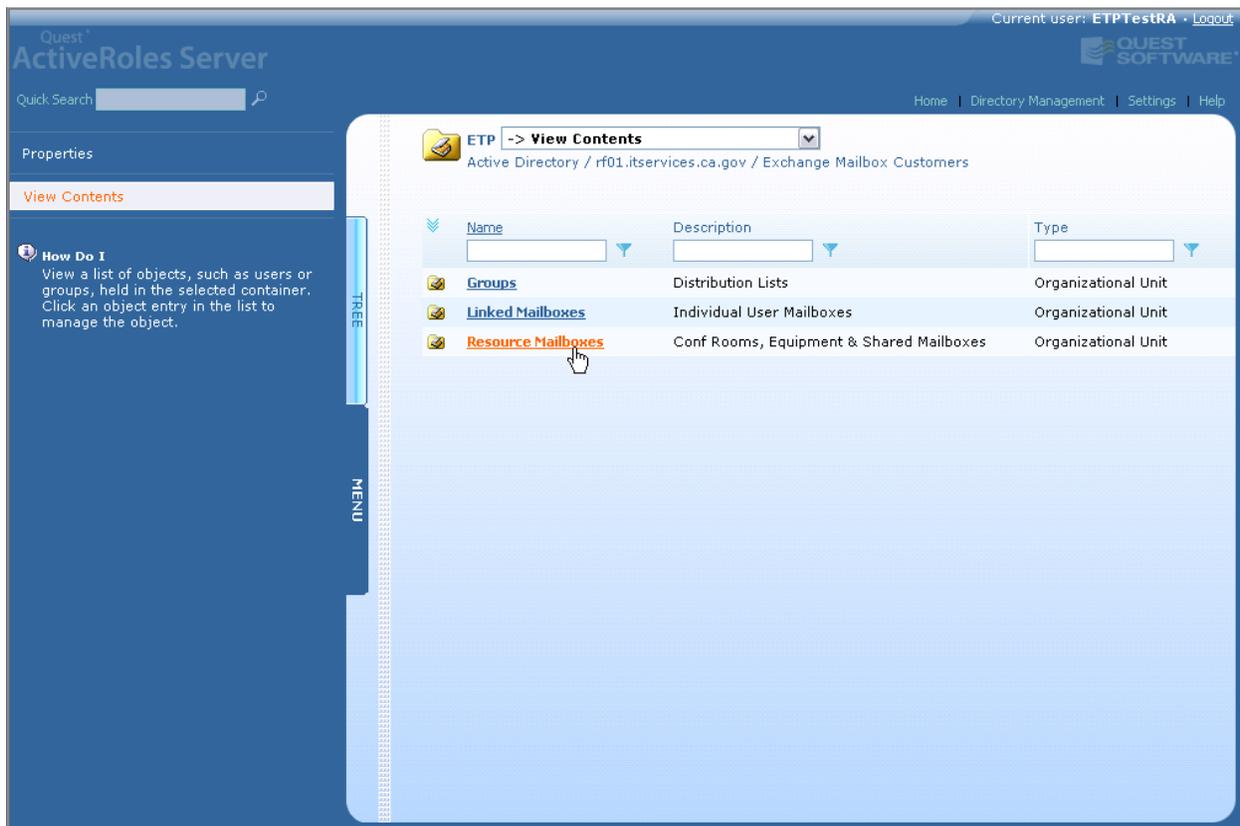


**\*\*\* Create Linked Mailbox procedure completed. \*\*\***

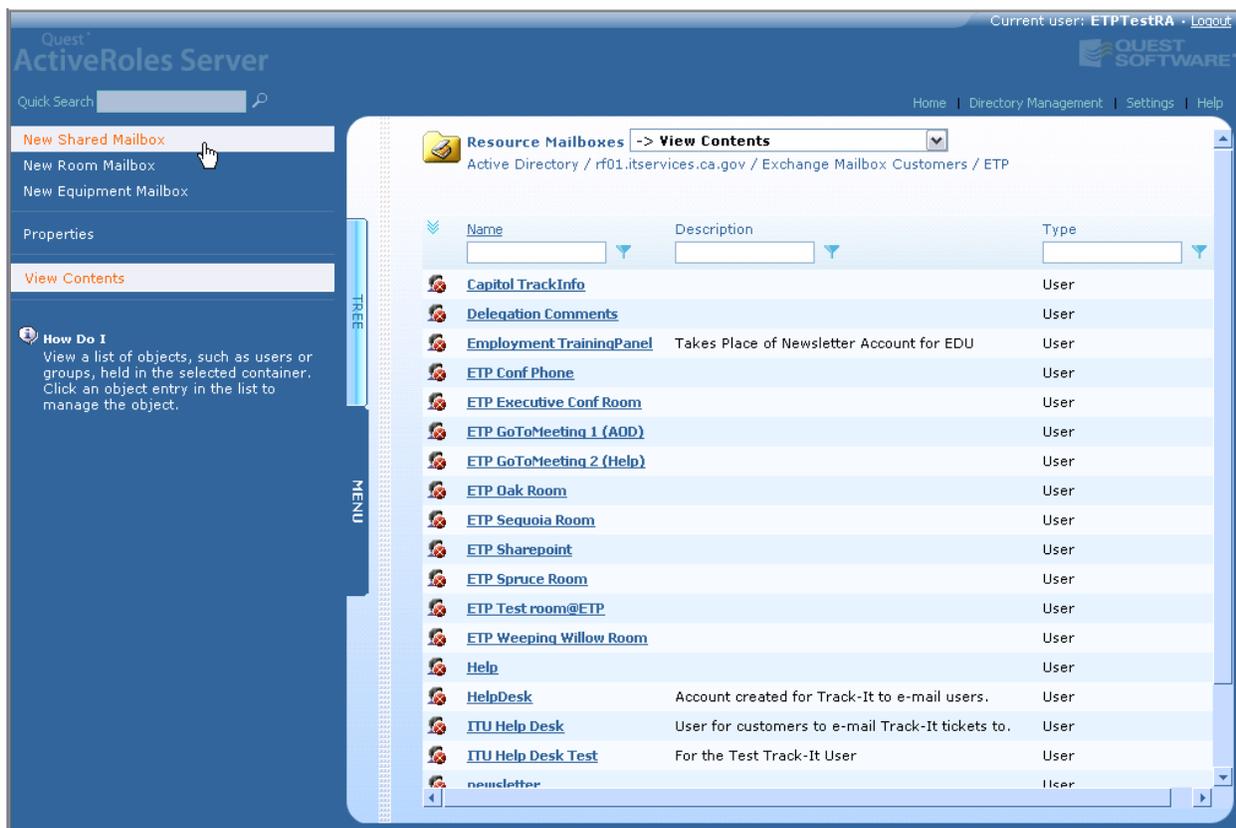
## Create a New Shared Mailbox Account

In the left column, in the **Tree View**, expand down through the rf01.itservices.ca.gov/ Exchange Mailbox Customers/'Department' (e.g., ETP).

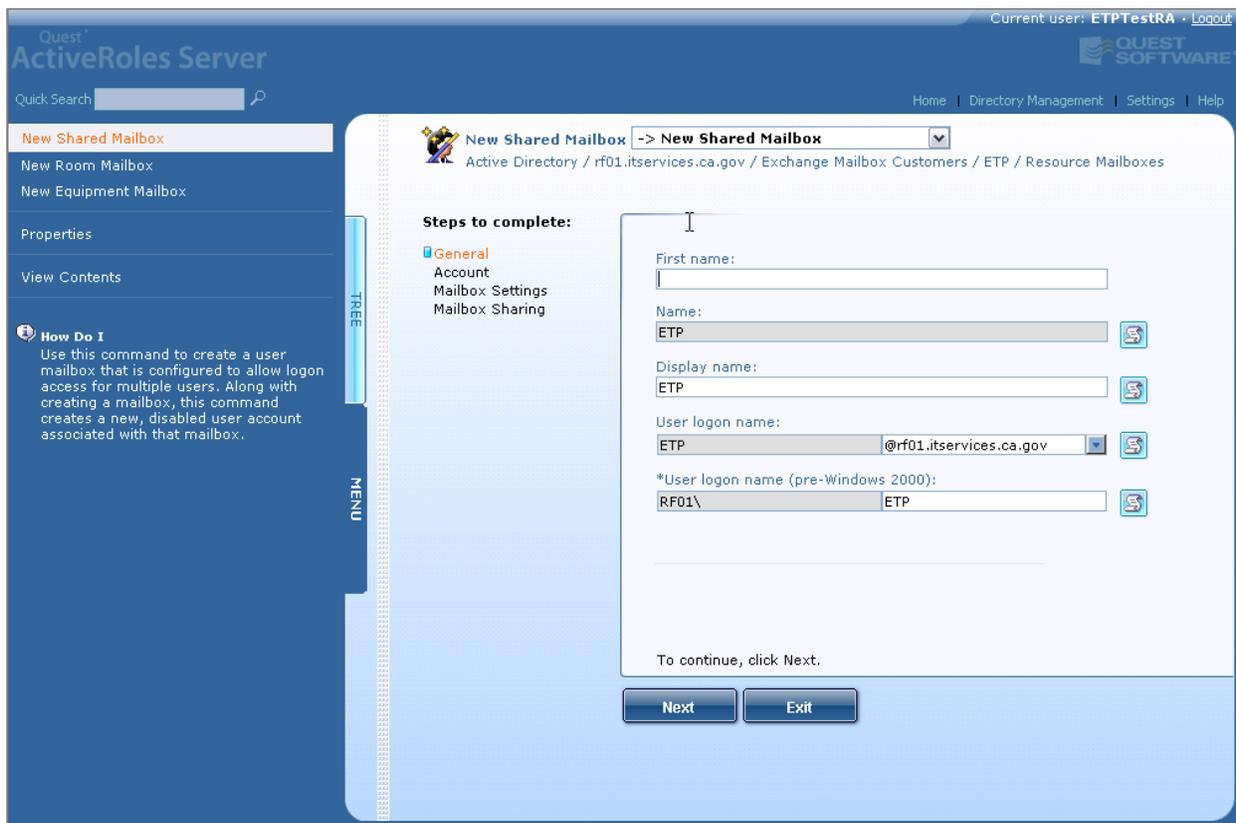
Then select the **Menu Bar** and click the **Resource Mailboxes** OU to start the process of creating a new shared mailbox account.



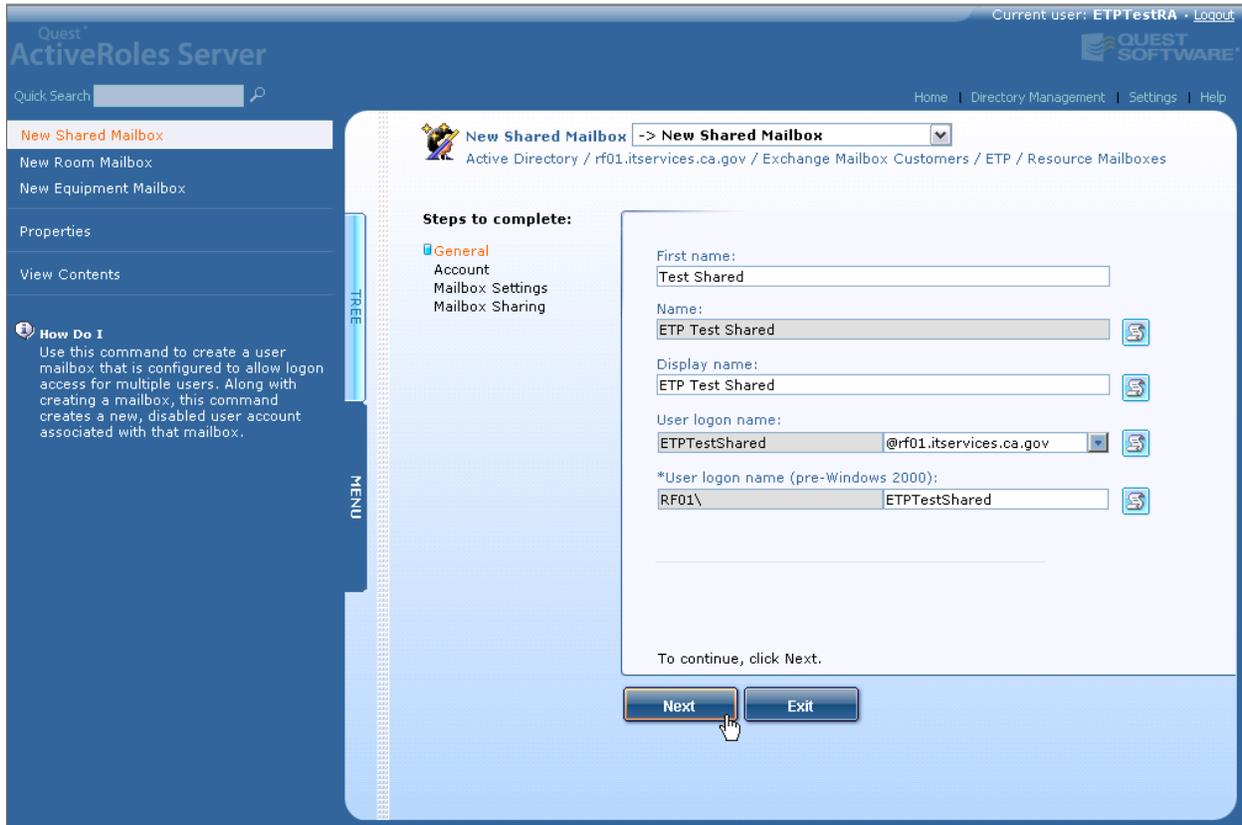
From the Command Menu on the left side of the screen, select the **New Shared Mailbox** command.



Populate the **First name:** field. ECAT policies will populate the **Name:** and **Display name:** fields to follow CA.Mail naming conventions for **Resource Mailboxes**.

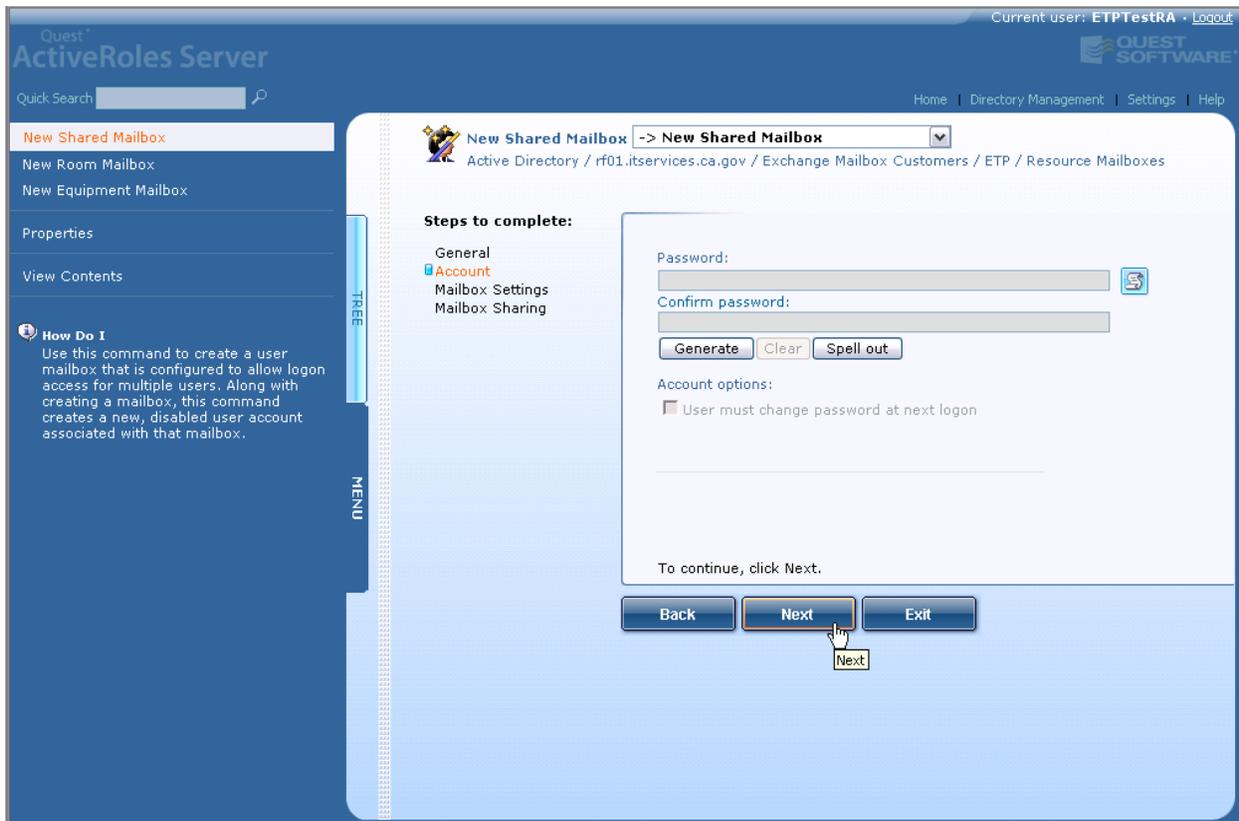


Then click **Next**. (Naming standards are reflected in the screen shot below.)

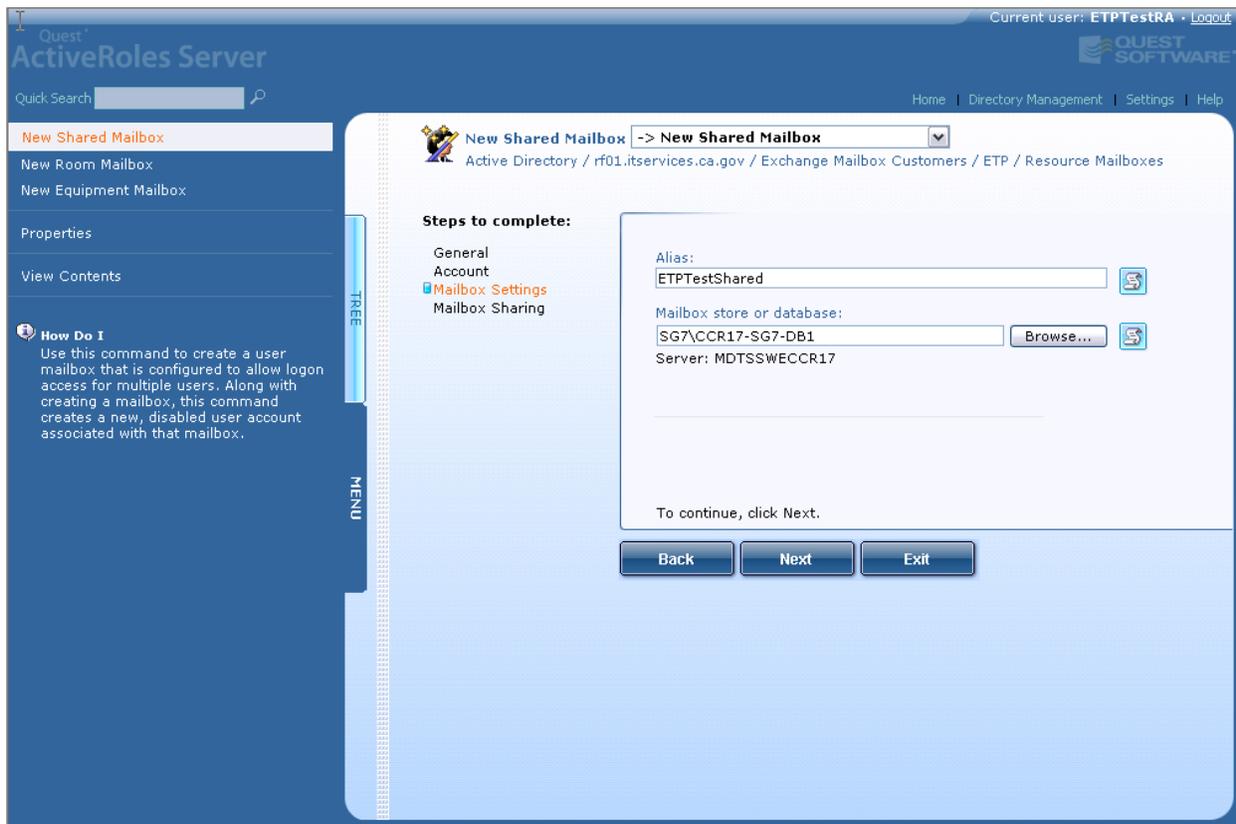


Then click **Next** again to bypass the **Account** (Password) step.

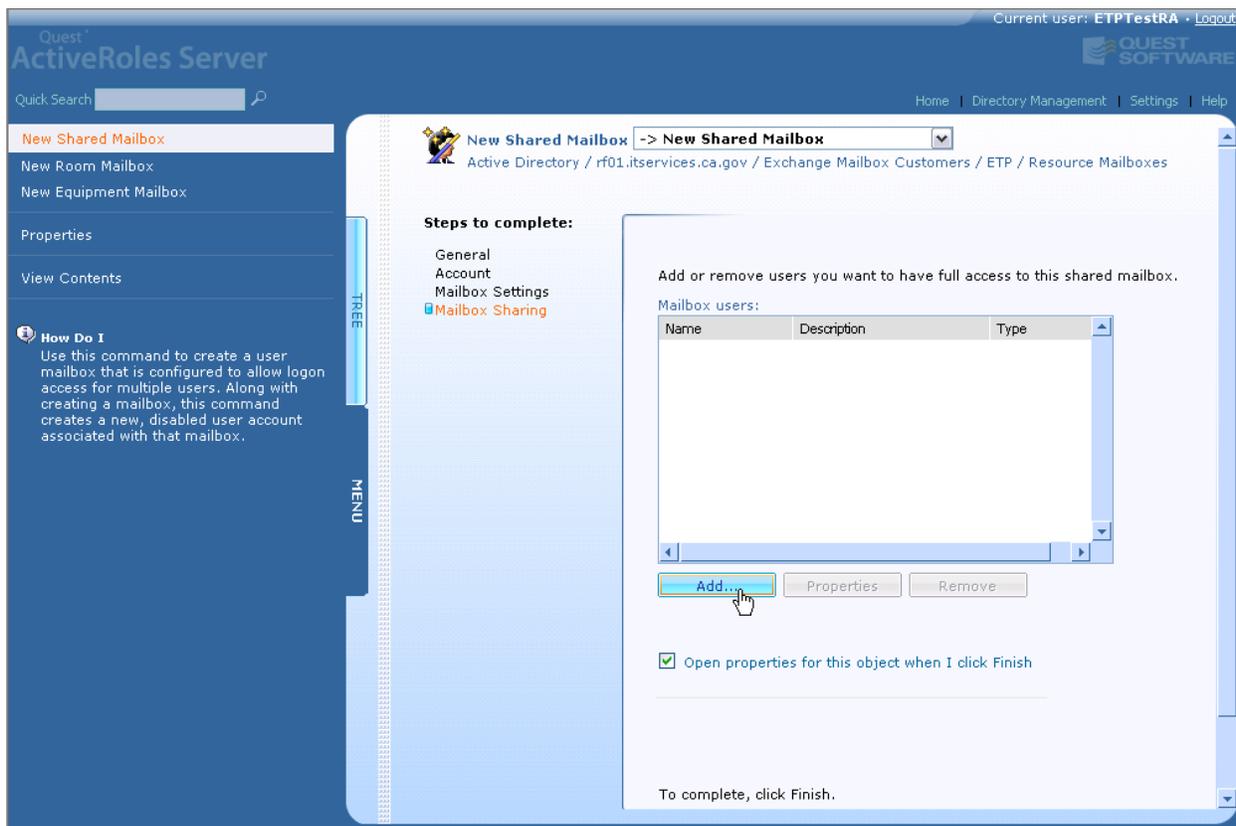
(Mailboxes accounts are disabled user accounts and therefore do **NOT** require a password)



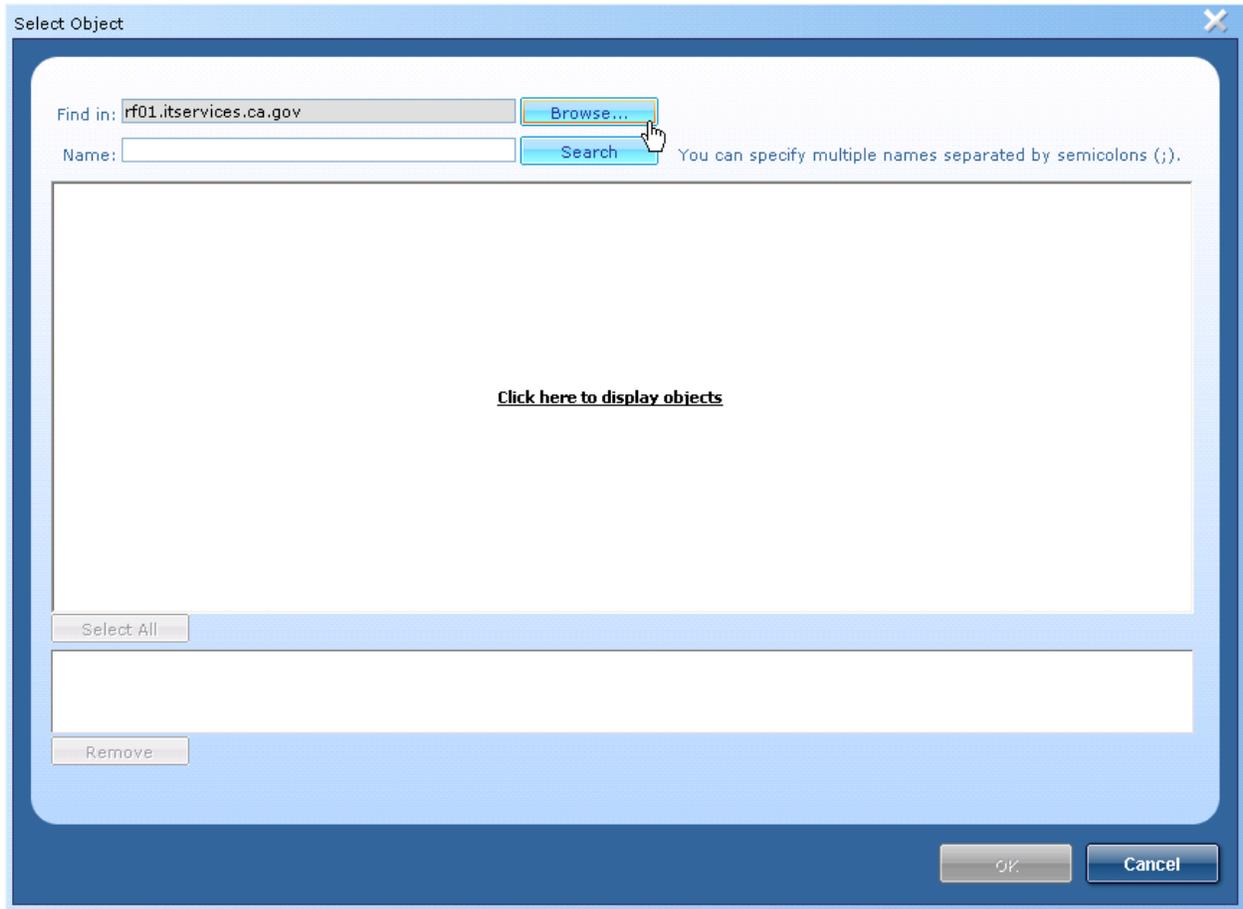
Then click **Next** again. The **Mailbox settings** step shows the **Alias:** and **Mailbox store or database:** of this mailbox and are set automatically through ECAT Policies.



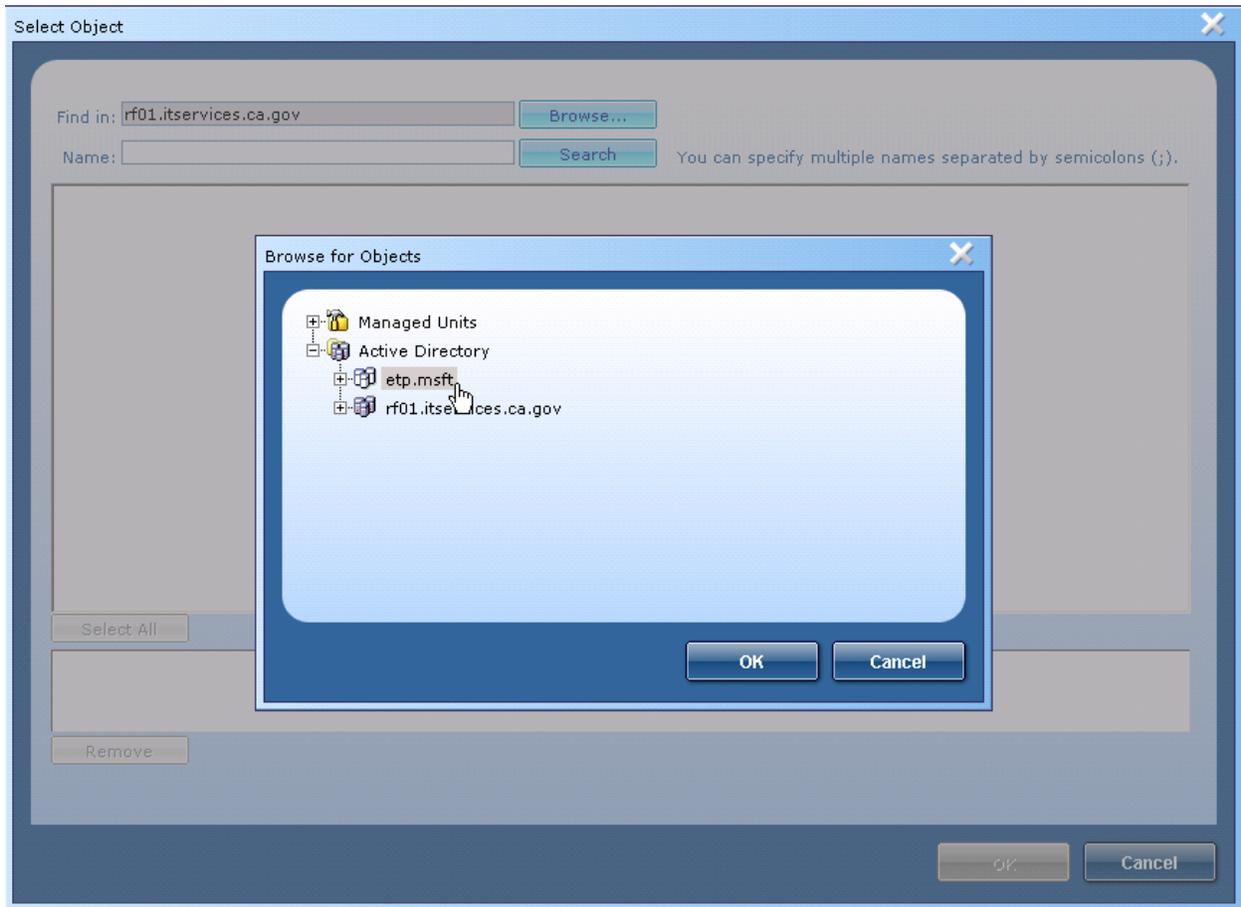
At the **Mailbox Sharing** step, click the **Add** button to add the user(s) or group of users who will have logon access to this **Shared Mailbox**.



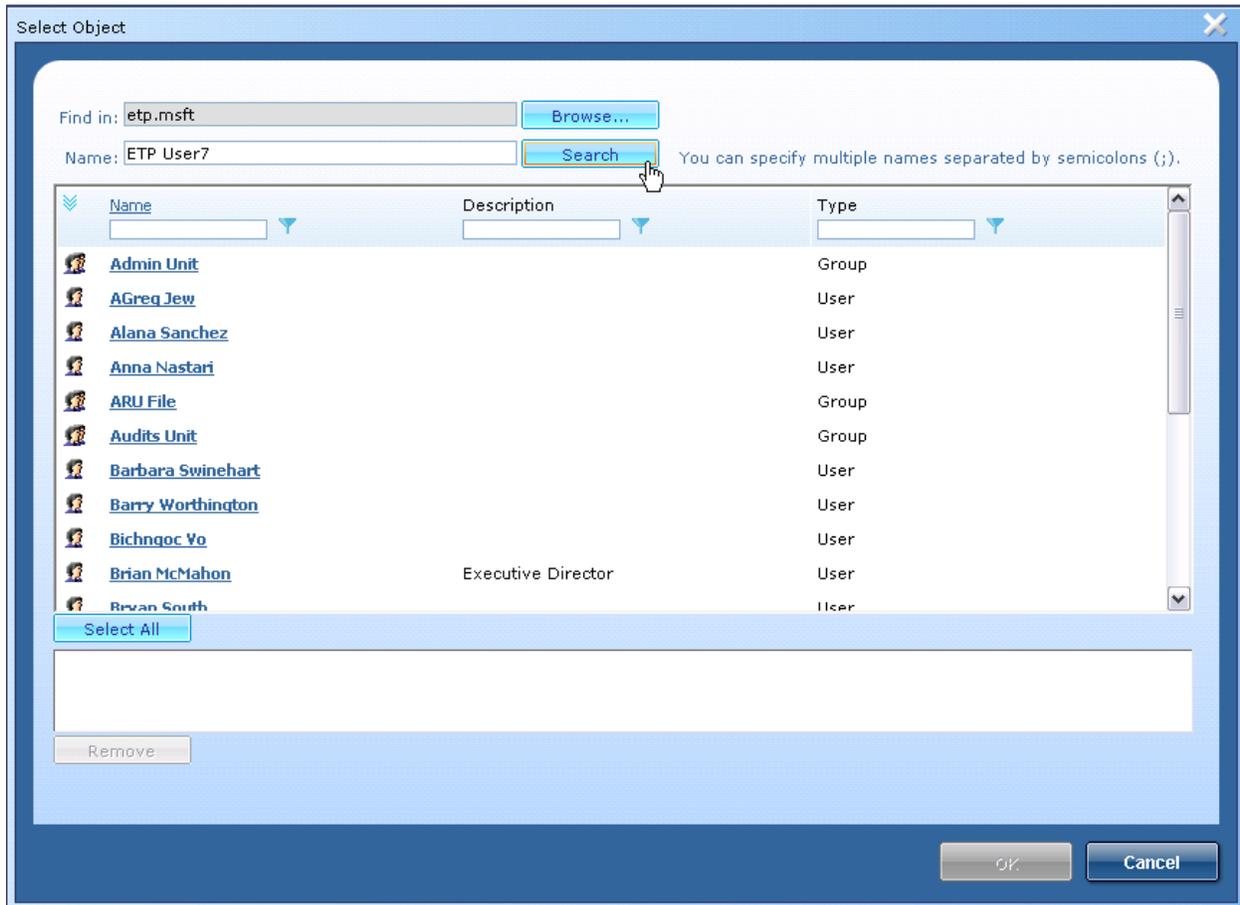
Click the **Browse...** button.



Select your department's authentication domain (e.g., etp.msft) to select the user(s) or group which will need the **allow logon access**.

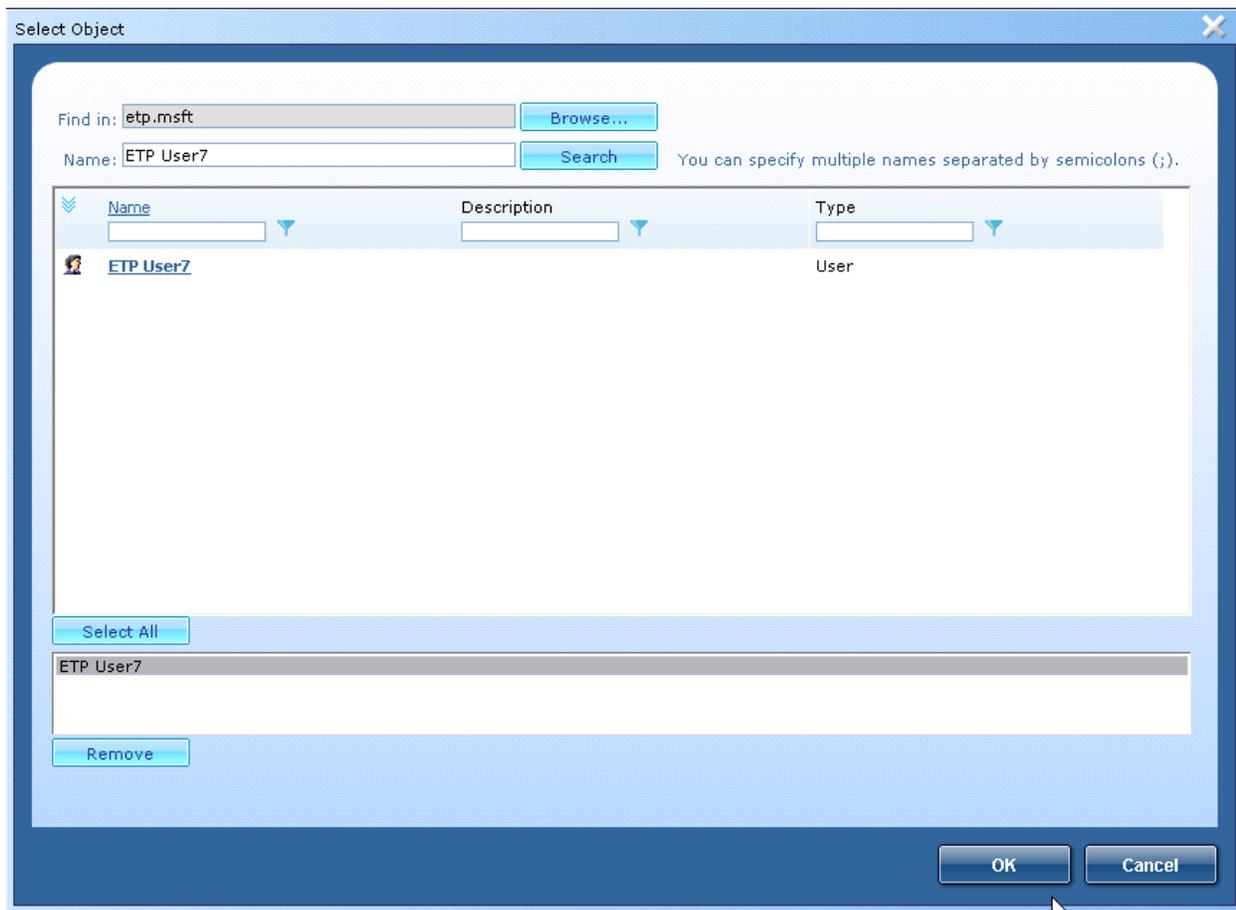


Type the name of the user or group in the **Name:** box and then click the **Search** button.



**NOTE:** If there are many users who will need access to this shared mailbox, OTech strongly recommend you create a group in your authentication domain for ease of manageability.

From the search results window, click the user name. This will populate that user into the bottom portion of the window below. If you need to add more users with allow login access, type into the **Name:** field the next user's name and repeat the search process until done. Once completed with the selection process of all users or group who need this access, click the **OK** button.



The **Mailbox Sharing** step will now show the user(s) or group that has been granted full access to this shared mailbox. Then click **Finish** to complete the creation of the **Shared Mailbox**.

Current user: ETPTestRA · Logout

QUEST SOFTWARE

Home | Directory Management | Settings | Help

Quick Search

New Shared Mailbox

New Room Mailbox

New Equipment Mailbox

Properties

View Contents

TREE

MENU

**How Do I**

Use this command to create a user mailbox that is configured to allow logon access for multiple users. Along with creating a mailbox, this command creates a new, disabled user account associated with that mailbox.

**New Shared Mailbox** -> **New Shared Mailbox**

Active Directory / rf01.itservices.ca.gov / Exchange Mailbox Customers / ETP / Resource Mailboxes

**Steps to complete:**

- General
- Account
- Mailbox Settings
- Mailbox Sharing

Add or remove users you want to have full access to this shared mailbox.

Mailbox users:

Name	Description	Type
ETP User7		User

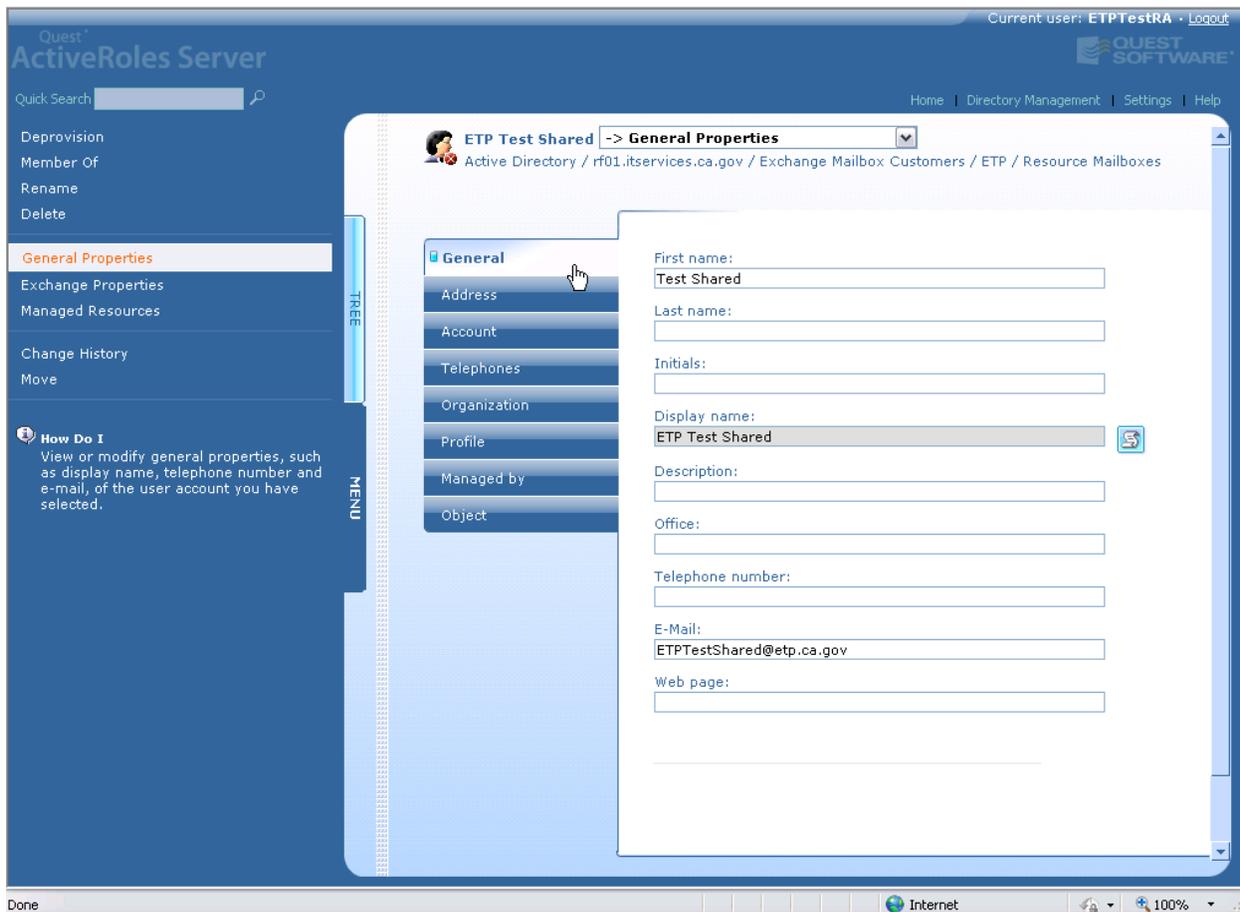
Buttons: Add..., Properties, Remove

Open properties for this object when I click Finish

To complete, click Finish.

Once completed, the screen will display the **General Properties, General** tab of the new **Shared Mailbox**.

Edit the fields of each tab (**General, Address, or Telephone**) as necessary for this mailbox. When finished with editing of the **General Properties**, click **Save**.



Select the **Exchange Properties** to view or change any of the mailbox settings for this **Shared Mailbox**.

Tabs of particular importance are:

**Storage Limits** – set mailbox size through a drop-down selection, which auto-populates the **Issue warning & Prohibit send** for that size limit

**E-mail Addresses** – view all email addresses for this mailbox

**Advanced** – hide the mailbox from the GAL (Global Address List)

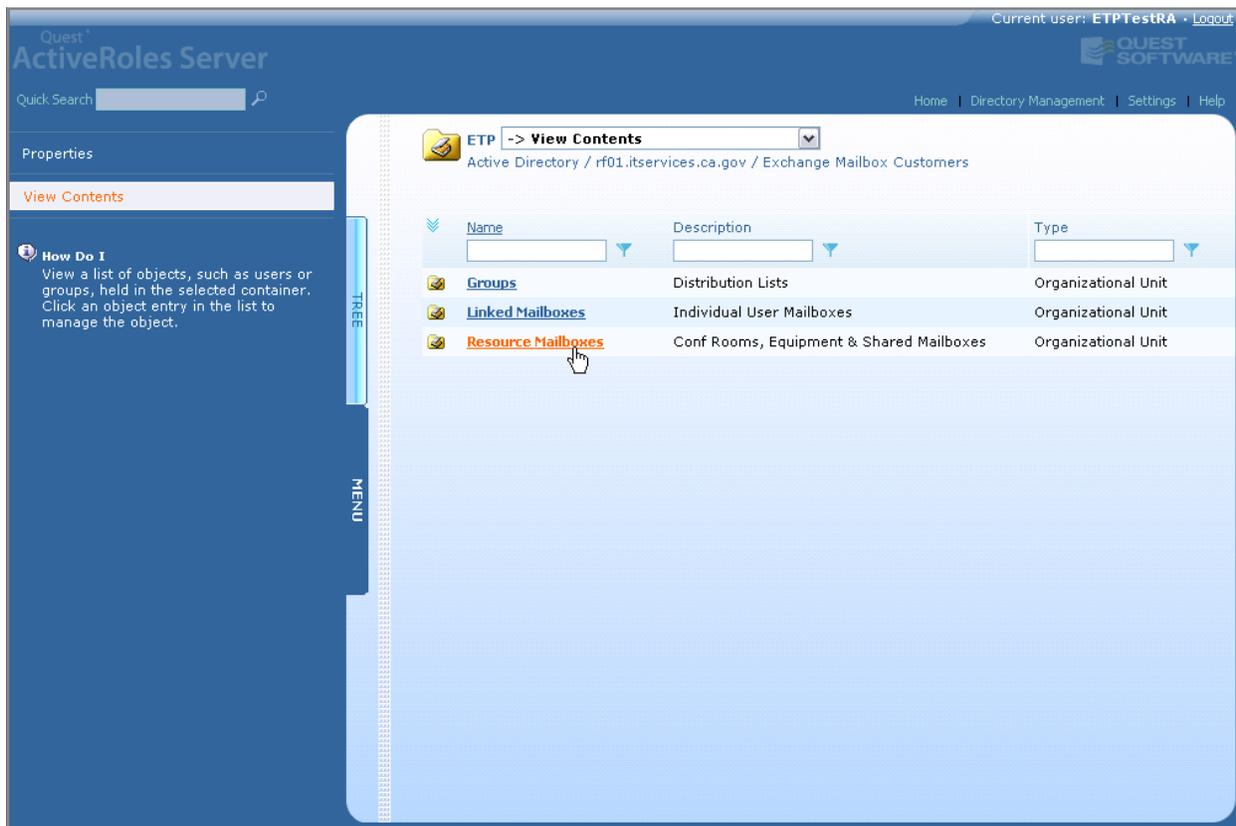
**Mailbox Sharing** – to grant other users allow logon access to this mailbox

The screenshot displays the Quest ActiveRoles Server web interface. The top navigation bar includes the Quest logo, 'ActiveRoles Server', a search bar, and the current user 'ETPTestRA'. The main content area shows the 'Exchange Properties' dialog for the mailbox 'ETP Test Shared'. The dialog has a left-hand menu with options: General (selected), Delivery Restrictions, Send As, Delegates, Storage Limits, E-mail Addresses, Advanced, Mailbox Rights, Mailbox Sharing, and Mailbox Features. The 'General' tab is active, showing the following fields: Mailbox type (Shared Mailbox), Alias (ETPTestShared), Mailbox store or database (SG7\CCR17-SG7-DB1), and Server (MDTSSWECCR17). There is a 'Linked account' field and a 'Properties' button. At the bottom of the dialog are 'Save' and 'Exit' buttons. The left sidebar contains a 'TREE' menu with options like Deprovision, Member Of, Rename, Delete, General Properties, Exchange Properties (highlighted), Managed Resources, Change History, and Move. A 'MENU' section below it includes a 'How Do I' link and a brief description of the tool's purpose.

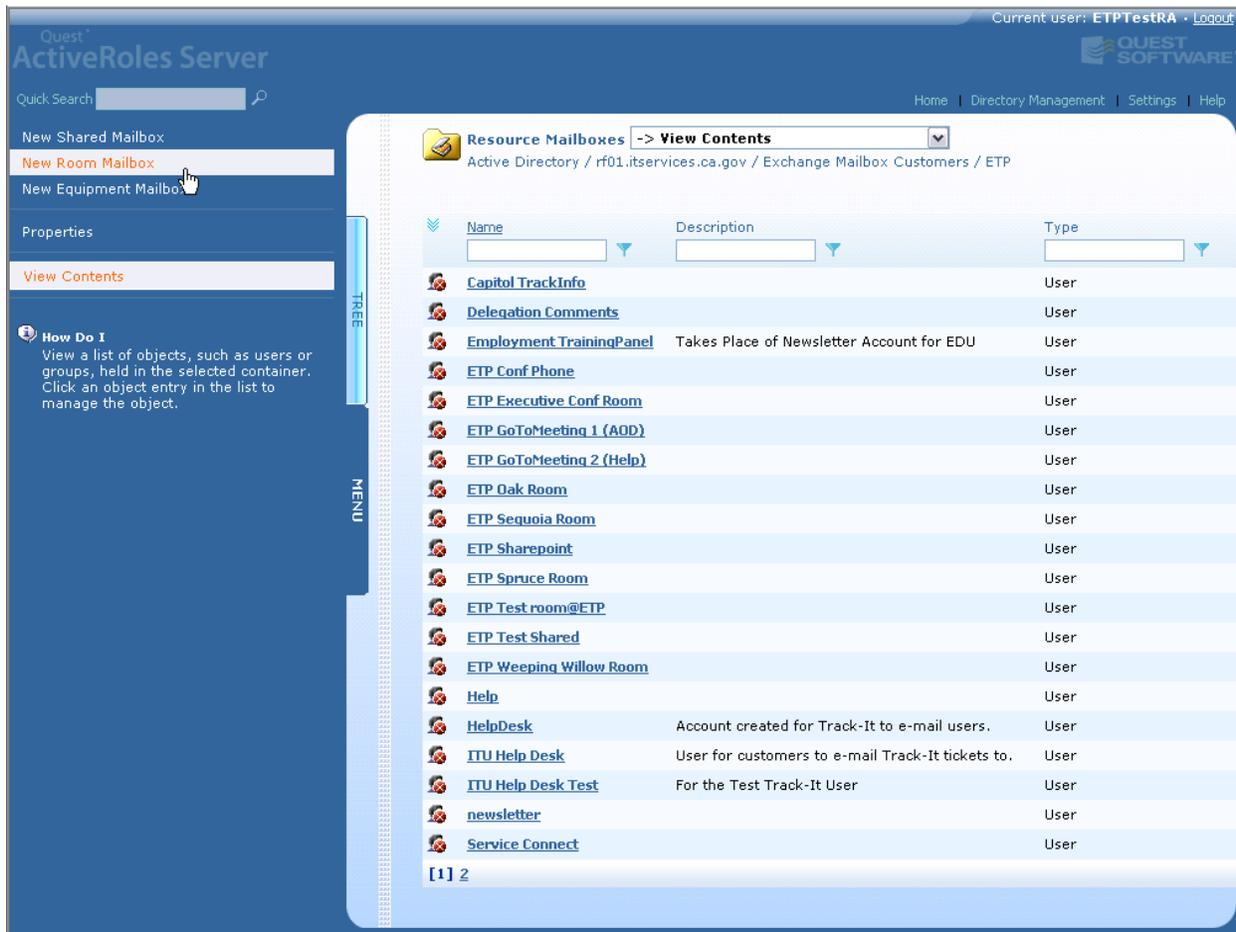
## Create a New Room or Equipment Mailbox

In the left column, in the **Tree View**, expand down through the rf01.itservices.ca.gov/ Exchange Mailbox Customer/'Department' (e.g., ETP).

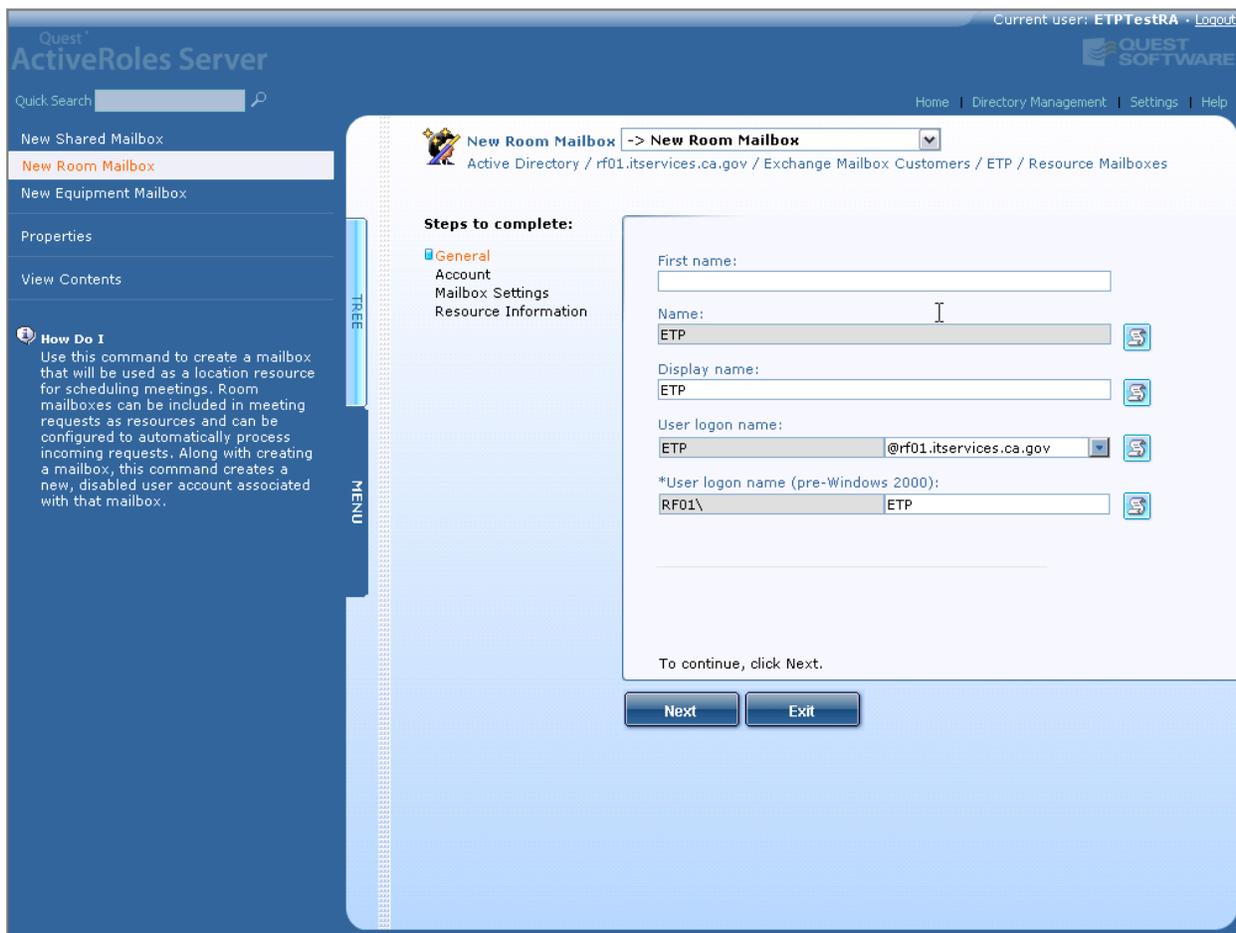
Then select the **Menu Bar** and click the **Resource Mailboxes** OU to start the process of creating a new room mailbox account.



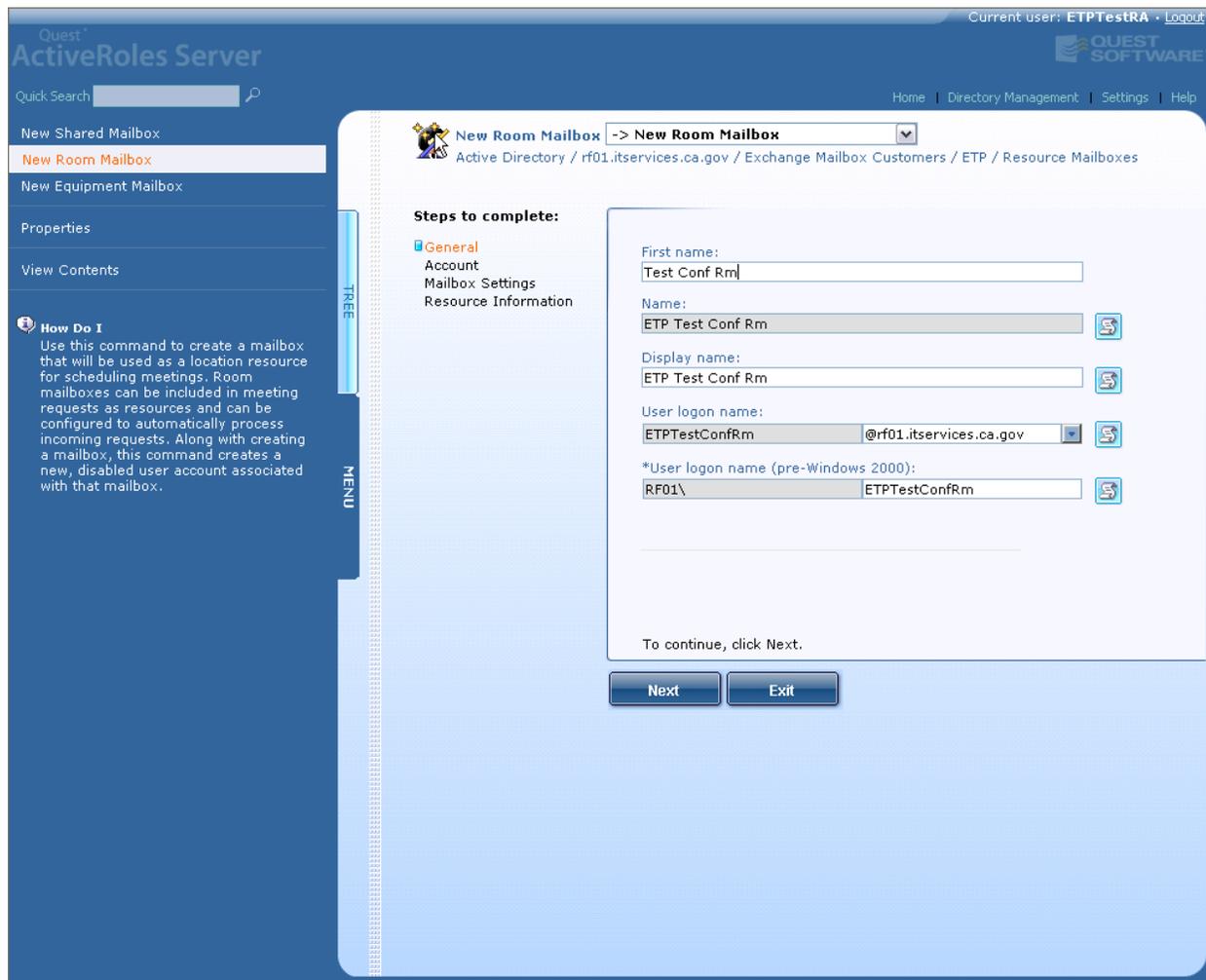
From the Command Menu on the left side of the screen, select the **New Room Mailbox** command.



Populate the **First name:** field. ECAT policies will populate the **Name:** and **Display name:** fields to follow CA.Mail naming conventions for **Resource Mailboxes**.



Then click **Next**. (Naming standards are reflected in the screen shot below.)

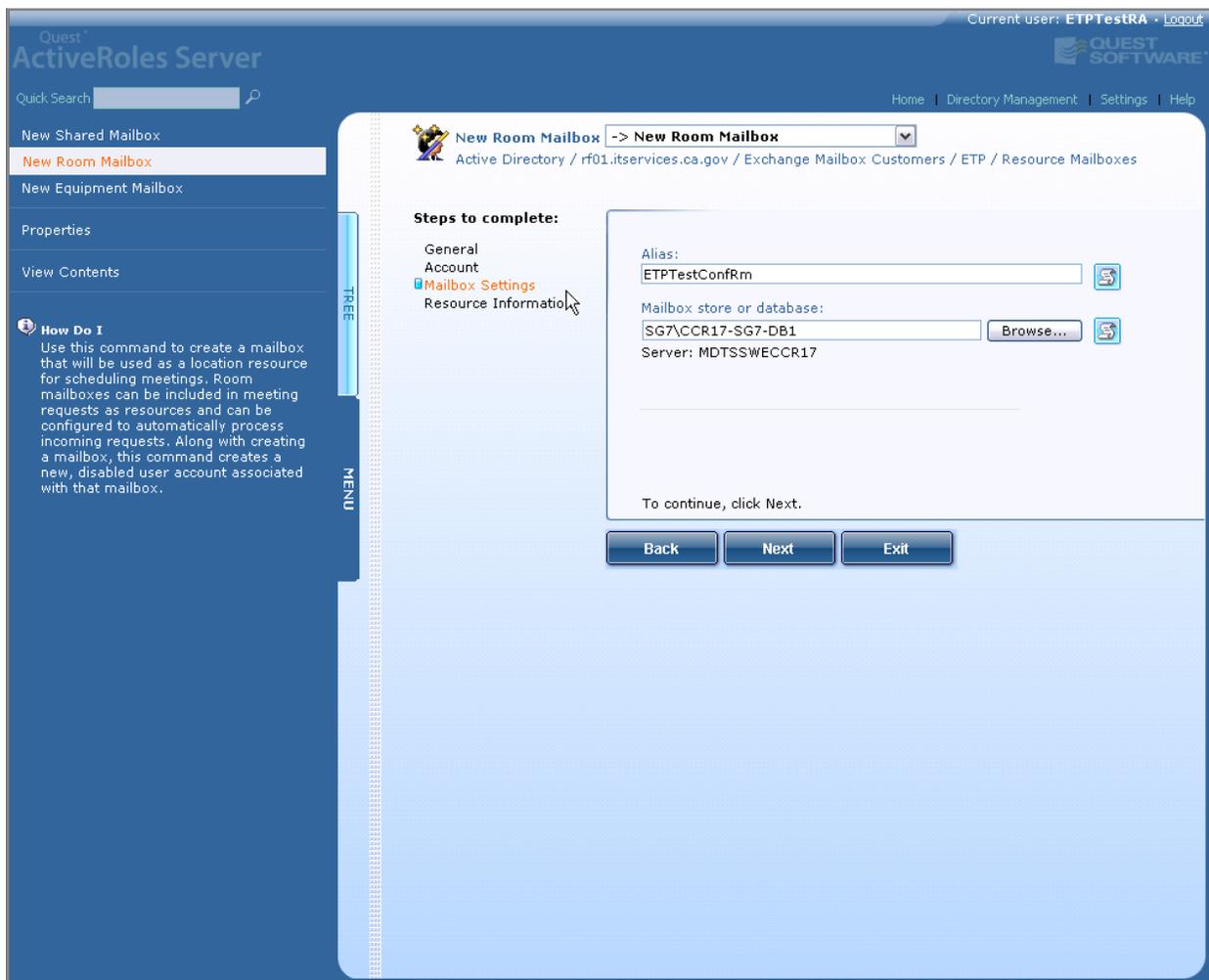


Then click **Next** again to bypass the **Account** (Password) step.

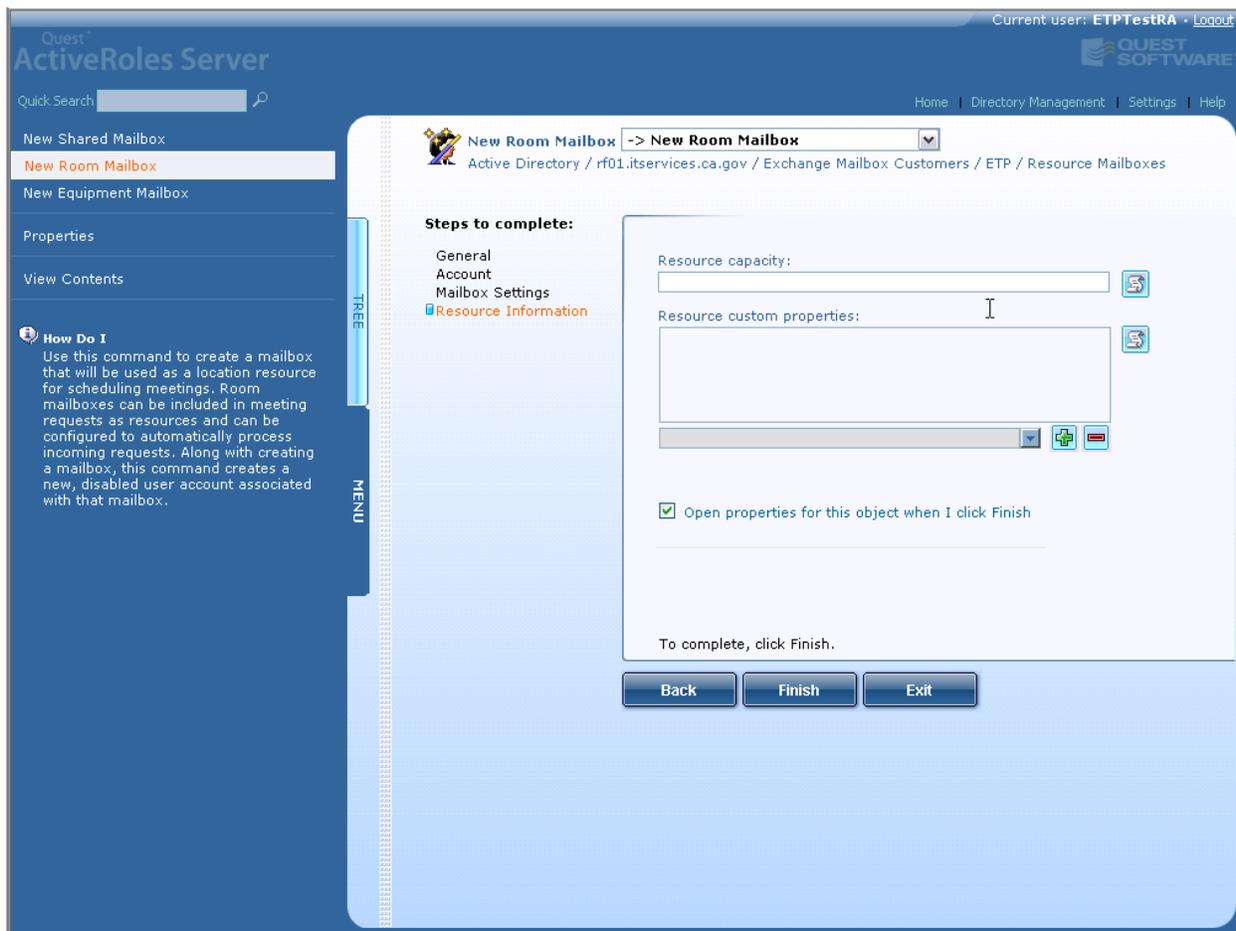
(Mailboxes accounts are disabled user accounts and therefore do **NOT** require a password)

The screenshot displays the Quest ActiveRoles Server web interface. The top navigation bar includes the Quest logo, 'ActiveRoles Server', a search bar, and the current user 'ETPTestRA' with a 'Logout' link. The main content area is titled 'New Room Mailbox' and shows a breadcrumb trail: 'Active Directory / rf01.itsservices.ca.gov / Exchange Mailbox Customers / ETP / Resource Mailboxes'. The 'Steps to complete:' section lists 'General', 'Account', 'Mailbox Settings', and 'Resource Information', with 'Account' currently selected. The 'Account' section contains a 'Password:' field, a 'Confirm password:' field, and buttons for 'Generate', 'Clear', and 'Spell out'. Below this is an 'Account options:' section with a checkbox for 'User must change password at next logon'. At the bottom, there are three buttons: 'Back', 'Next', and 'Exit'. A mouse cursor is pointing at the 'Next' button. The left sidebar contains a 'TREE' menu with options like 'New Shared Mailbox', 'New Room Mailbox', and 'New Equipment Mailbox', and a 'MENU' section with a 'How Do I' link and a detailed description of the 'New Room Mailbox' command.

Then click **Next** again. The **Mailbox settings** step shows the **Alias:** and **Mailbox store or database:** of this mailbox and are set automatically through ECAT Policies.

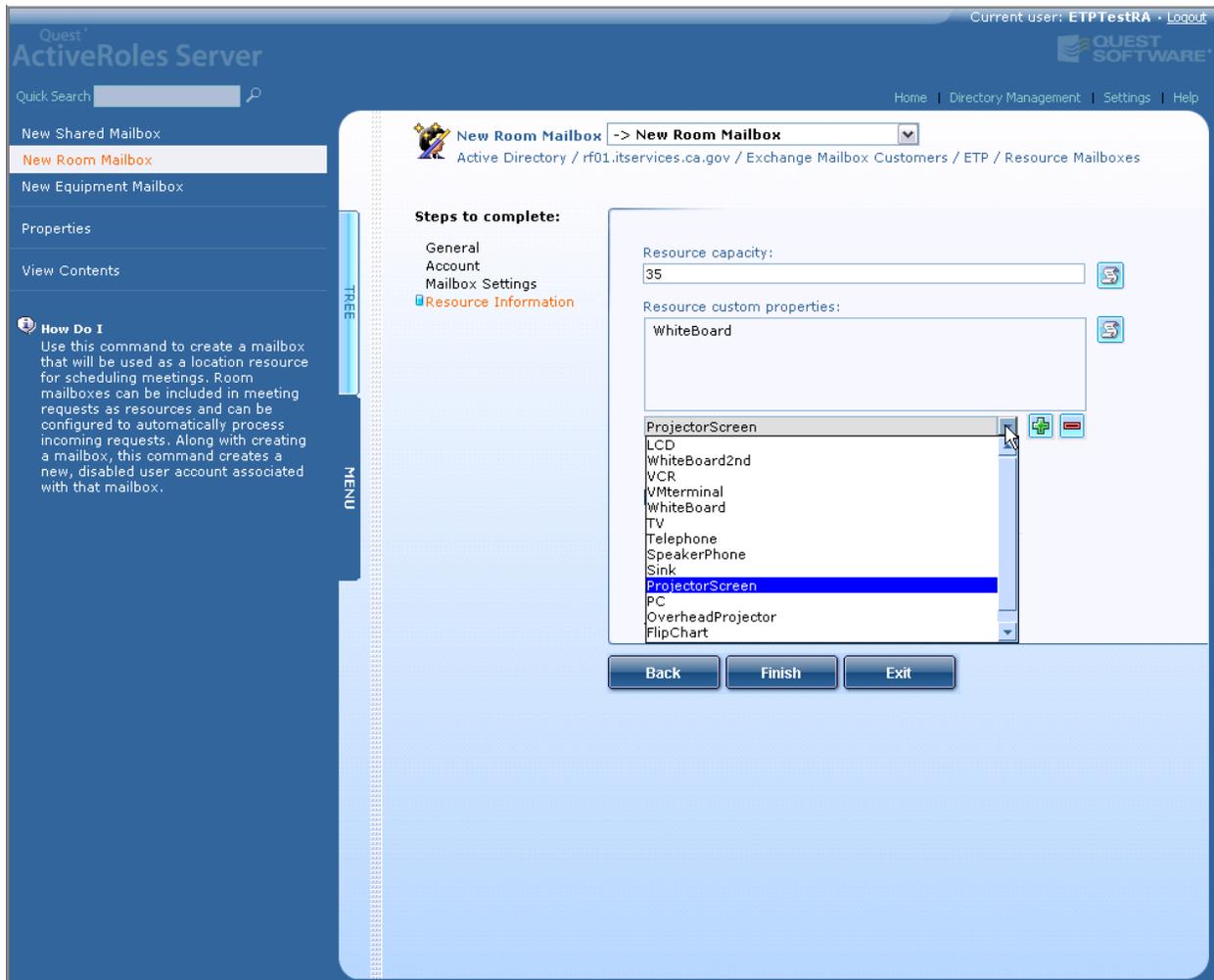


At the **Resource Information** step, populate the **Resource capacity:** and **Resource custom properties:** this particular conference room will have.



Click the **Plus sign (+)** to add the selected resource from the drop-down, then click **Finish**.

**Example:** This particular Conference Room has a room capacity of 35 and contains a White Board and a Projector Screen.



**NOTE:** Creation of an **Equipment Mailbox** is the same as a **Room Mailbox**, except the **Resource custom properties:** field has **NO** drop-down selection. (*User must type in the specifics of the Equipment in the lower box, then click the plus sign*).

Once completed, the screen will display the **General Properties, General** tab of the new **Shared Mailbox**.

Edit the fields of each tab (*General, Address, or Telephone*) as necessary for this mailbox. When finished with editing of the **General Properties**, click **Save**.

The screenshot displays the Quest ActiveRoles Server web interface. The top navigation bar includes the Quest logo, the text "ActiveRoles Server", a "Quick Search" field, and the current user "ETPTestRA" with a "Logout" link. The main content area shows a success message: "The operation is successfully completed." Below this, the breadcrumb path is "Active Directory / rf01.itservices.ca.gov / Exchange Mailbox Customers / ETP / Resource Mailboxes". The "General Properties" tab is selected, showing a list of tabs: General, Address, Account, Telephones, Organization, Profile, Managed by, and Object. The "General" tab is active, displaying the following fields:

- First name:
- Last name:
- Initials:
- Display name:  (with a small icon to the right)
- Description:
- Office:
- Telephone number:
- E-Mail:
- Web page:

At the bottom of the form are "Save" and "Exit" buttons. The left sidebar contains a "TREE" menu with options like "Deprovision", "Member Of", "Rename", "Delete", "General Properties", "Exchange Properties", "Managed Resources", "Change History", and "Move". A "MENU" section below it includes a "How Do I" link and a brief instruction: "View or modify general properties, such as display name, telephone number and e-mail, of the user account you have selected."

Select the **Exchange Properties** to view or change any of the mailbox settings for this **Room Mailbox**.

Tabs of particular importance are:

**General** – shows the Exchange server and storage group location of the mailbox

**Storage Limits** – ability to set mailbox size through a drop-down selection, which auto-populates the **Issue warning & Prohibit send** for that size limit

**E-mail Addresses** – view all email addresses for this mailbox

**Advanced** – to hide the mailbox from the GAL (Global Address List)

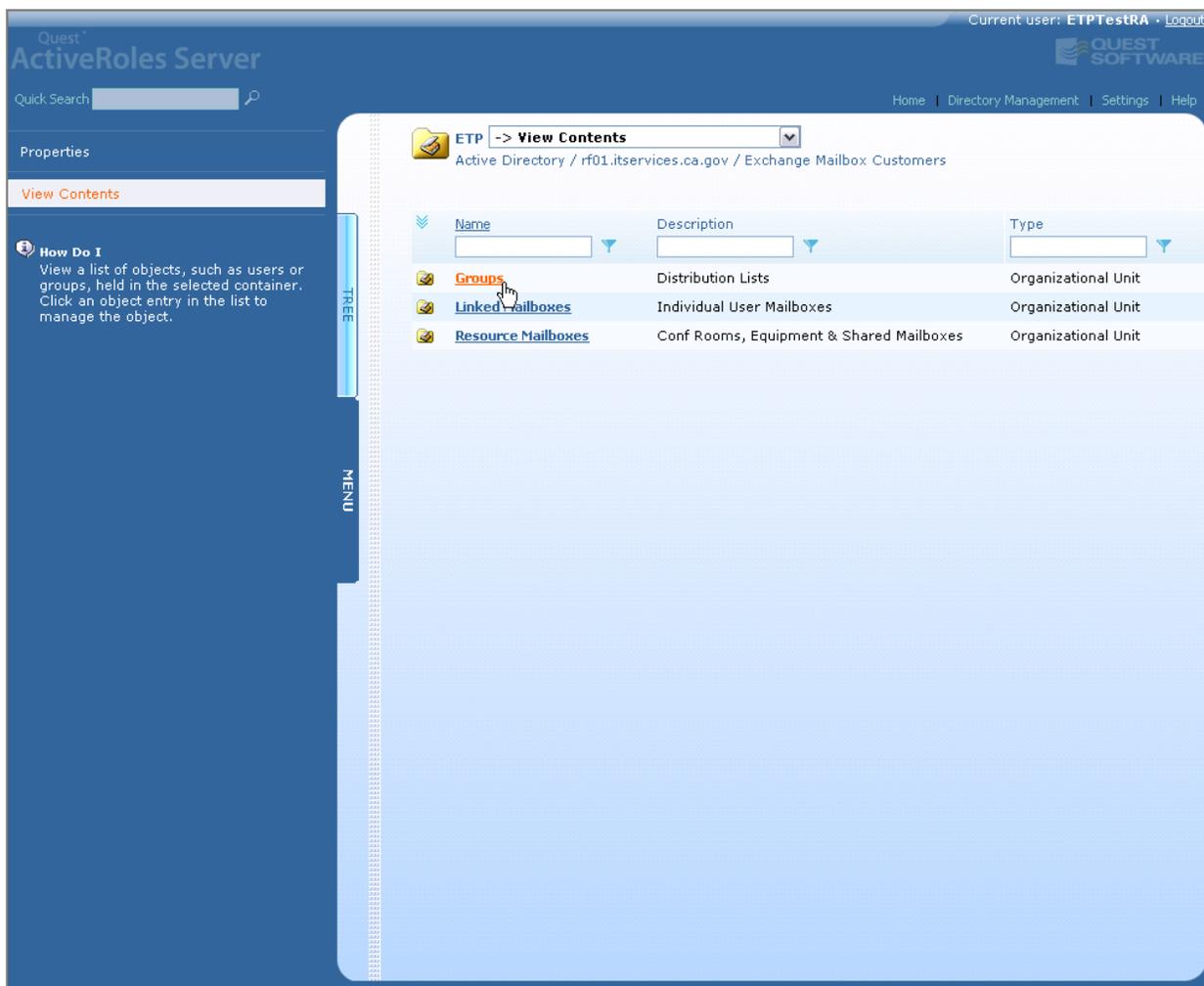
**Resource Information** – shows the **Resource capacity:** and **Resource custom properties:** of this mailbox.

The screenshot displays the Quest ActiveRoles Server web interface. The top navigation bar includes the Quest logo, the text "ActiveRoles Server", a "Quick Search" field, and the current user "ETPTestRA" with a "Logout" link. The breadcrumb trail shows the path: Home | Directory Management | Settings | Help. The main content area is titled "ETP Test Conf Rm -> Exchange Properties" and shows the mailbox path: Active Directory / rf01.itservices.ca.gov / Exchange Mailbox Customers / ETP / Resource Mailboxes. A left-hand menu lists various actions: Deprovision, Member Of, Rename, Delete, General Properties, Exchange Properties (highlighted), Managed Resources, Change History, Move, and a "How Do I" section. The "Exchange Properties" window is open, showing the "General" tab. The "Mailbox type" is set to "Room Mailbox". The "Alias" field contains "ETPTestConfRm". The "Mailbox store or database" is "SG7\CCR17-SG7-DB1" and the "Server" is "MDTSSWECCR17". There is a "Linked account" field and a "Properties" button. At the bottom of the window are "Save" and "Exit" buttons.

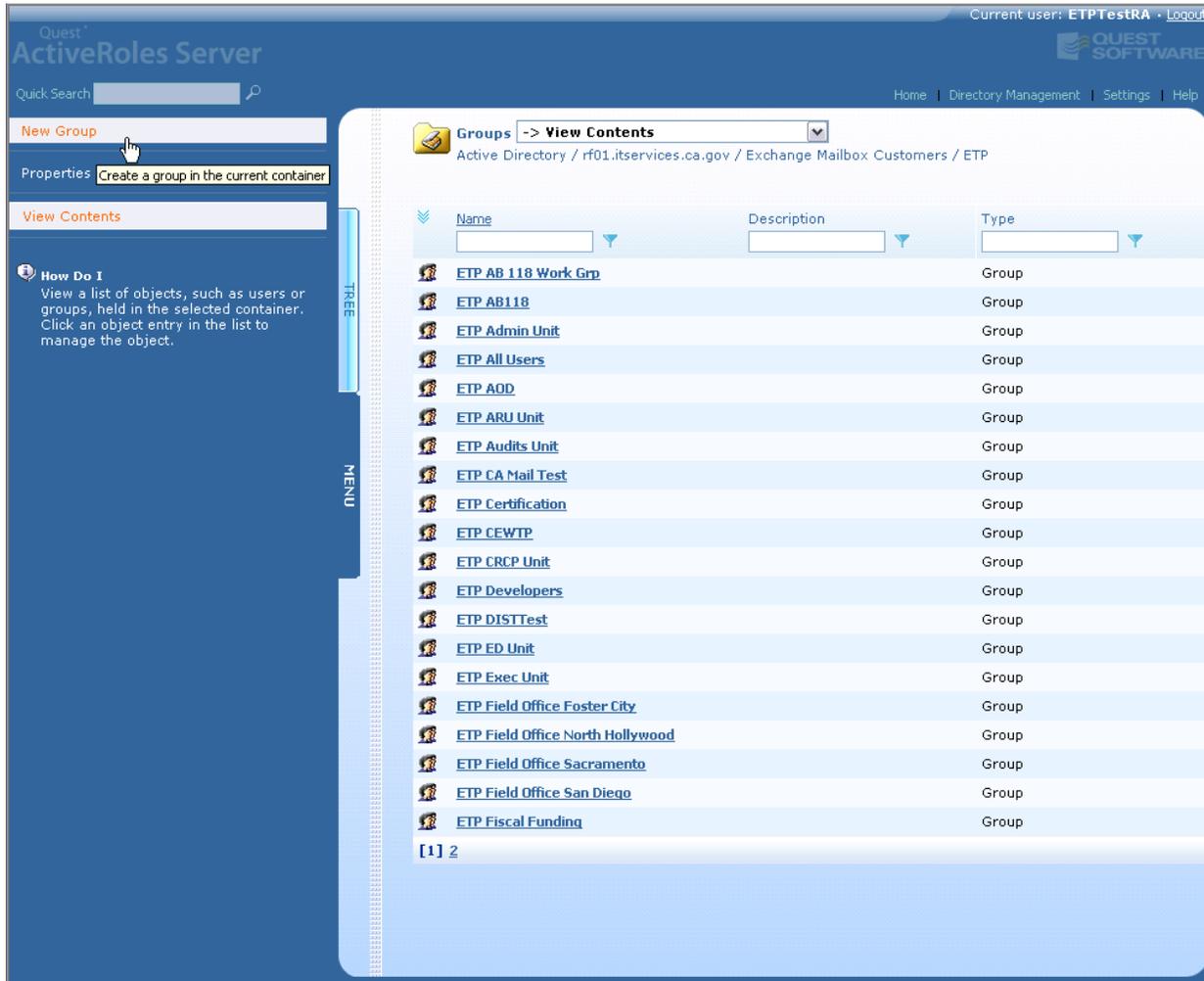
## Create a New Group (Distribution List)

In the left column, in the **Tree View**, expand down through the rf01.itservices.ca.gov/ Exchange Mailbox Customer/ *Department* (e.g., ETP).

Then select the **Menu Bar** and click the **Groups** OU to start the process of creating a new group (distribution group).



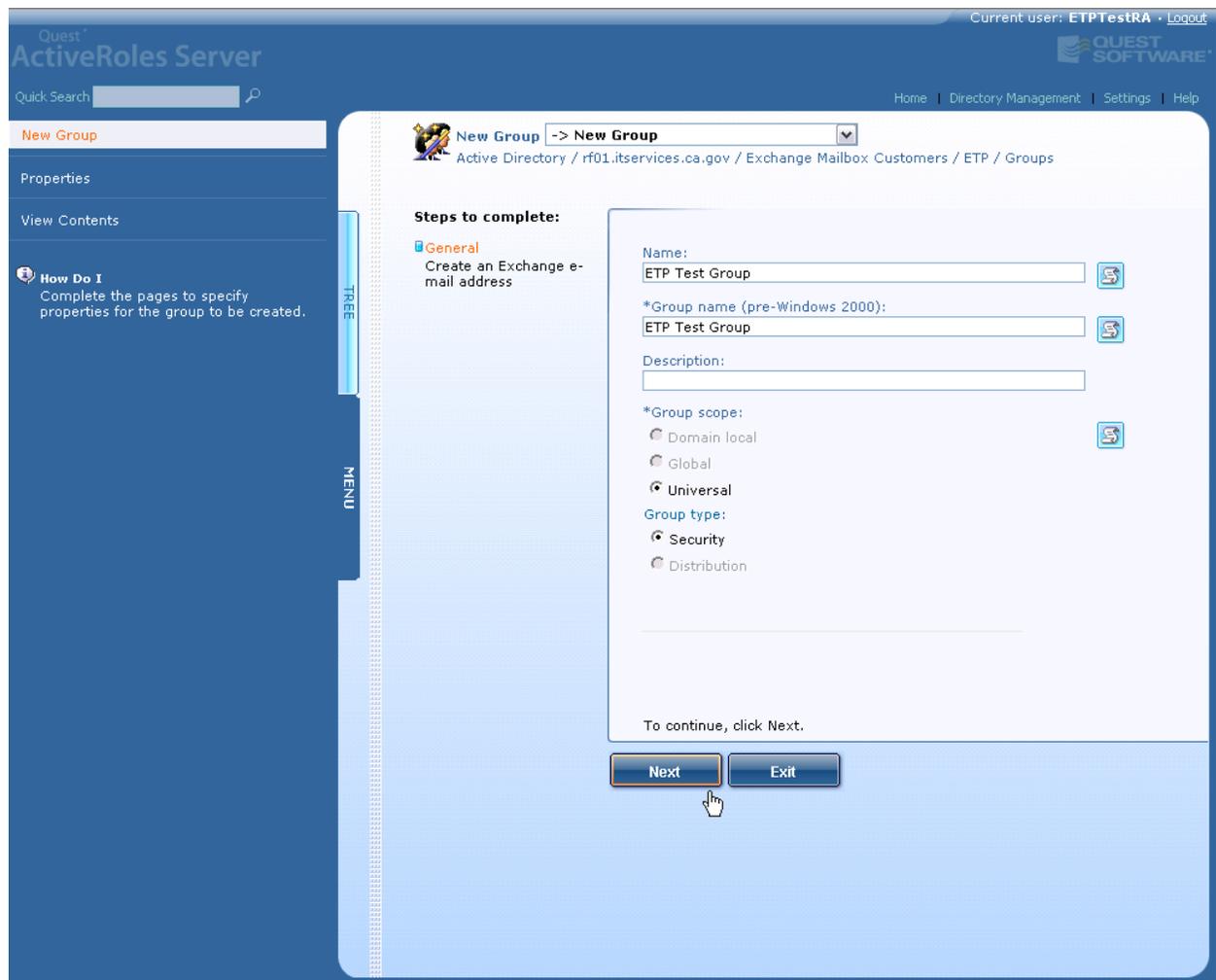
Select the **New Group** command from the Command Menu on the left side of screen.



Type the name of the Distribution List in the **Name:** box.

**NOTE:** OTech scripts automatically populate the field with your department name. All Distribution Lists names must begin with the customer's department acronym, which is the OTech standard for Distribution List names in the GAL. (e.g., EBT, DDS, OCIO)

Then click **Next**.

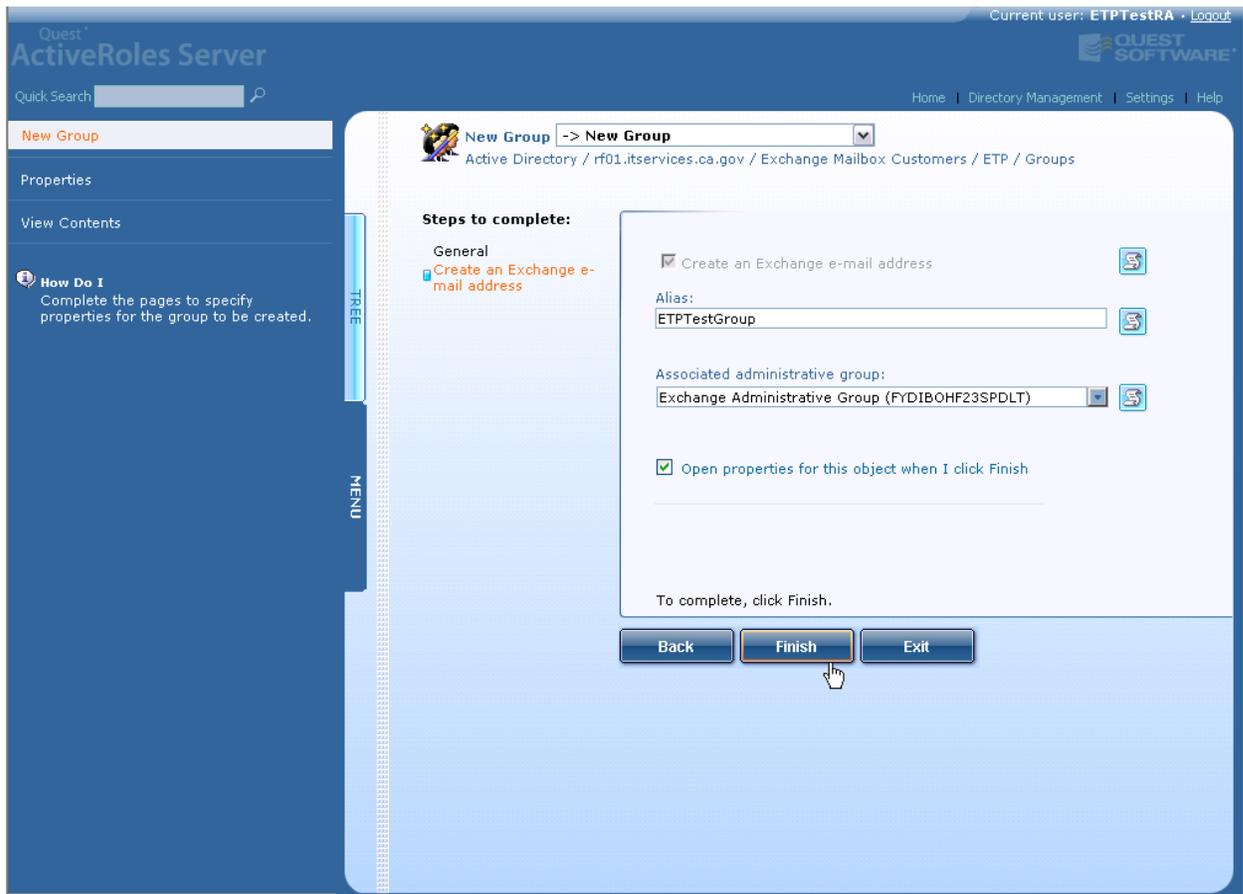


The screenshot displays the Quest ActiveRoles Server web interface for creating a new group. The interface includes a navigation pane on the left with options like 'New Group', 'Properties', and 'View Contents'. The main content area shows the 'New Group' wizard with the following fields and options:

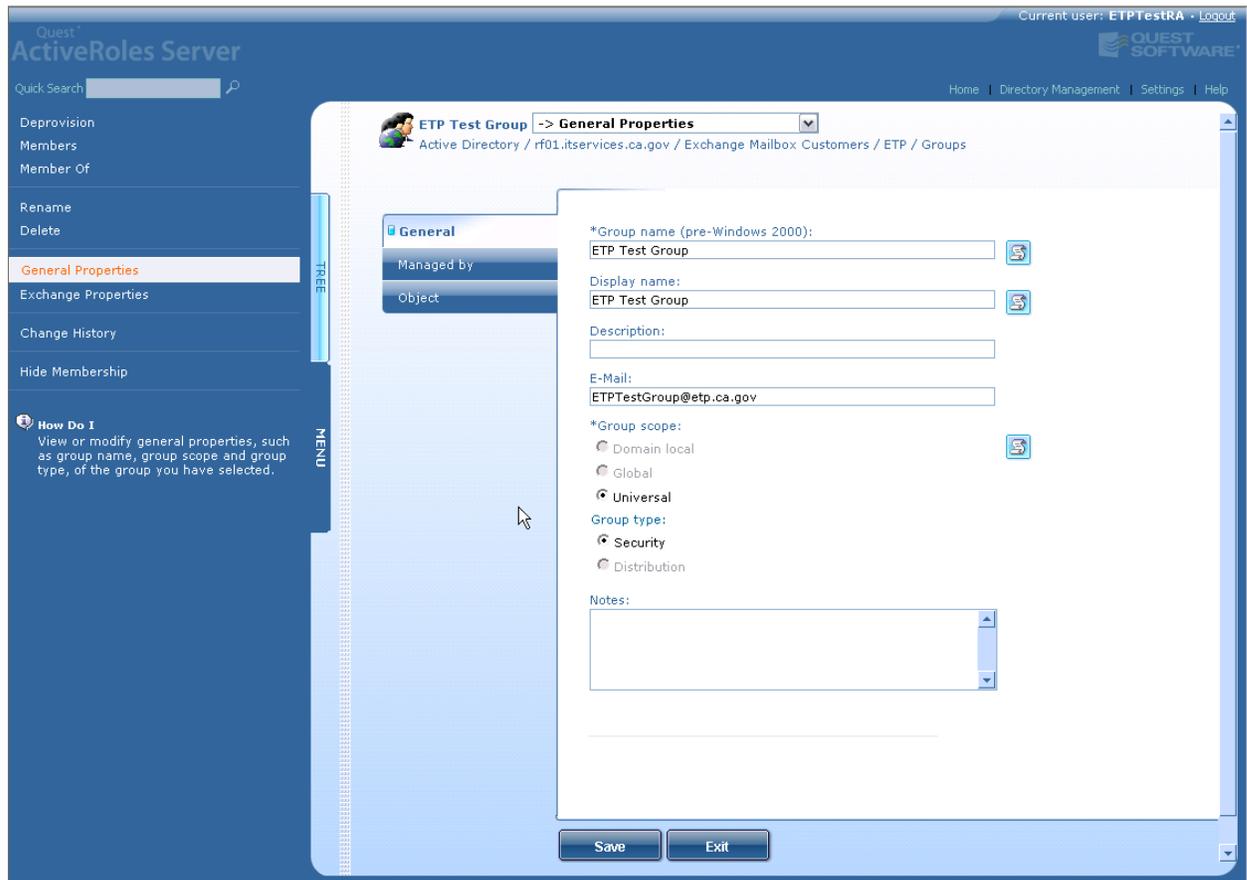
- Name:** ETP Test Group
- \*Group name (pre-Windows 2000):** ETP Test Group
- Description:** (empty field)
- \*Group scope:** Domain local, Global, **Universal** (selected)
- Group type:** **Security** (selected), Distribution

At the bottom of the wizard, there are two buttons: 'Next' (highlighted with a mouse cursor) and 'Exit'. The text 'To continue, click Next.' is displayed above the buttons.

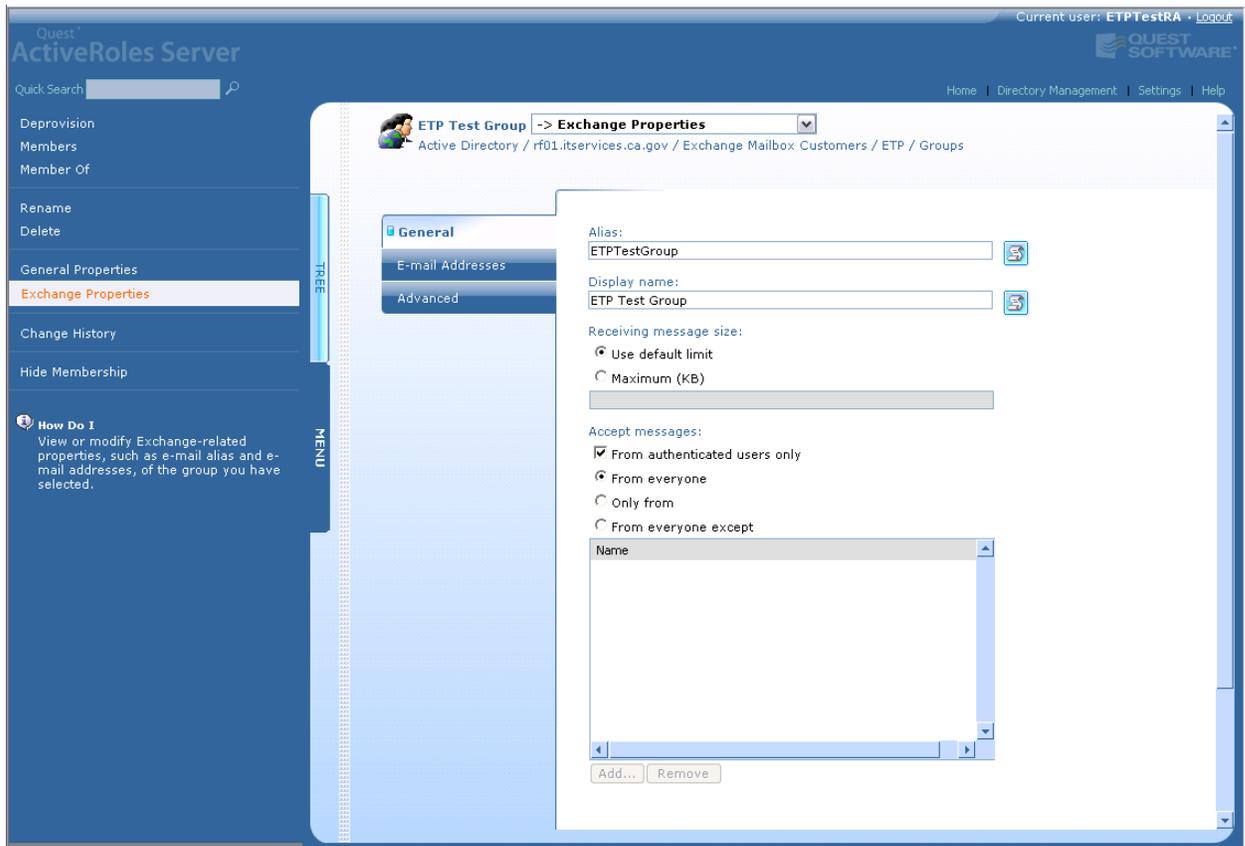
At the “Create an Exchange e-mail address” step, click **Finish**.



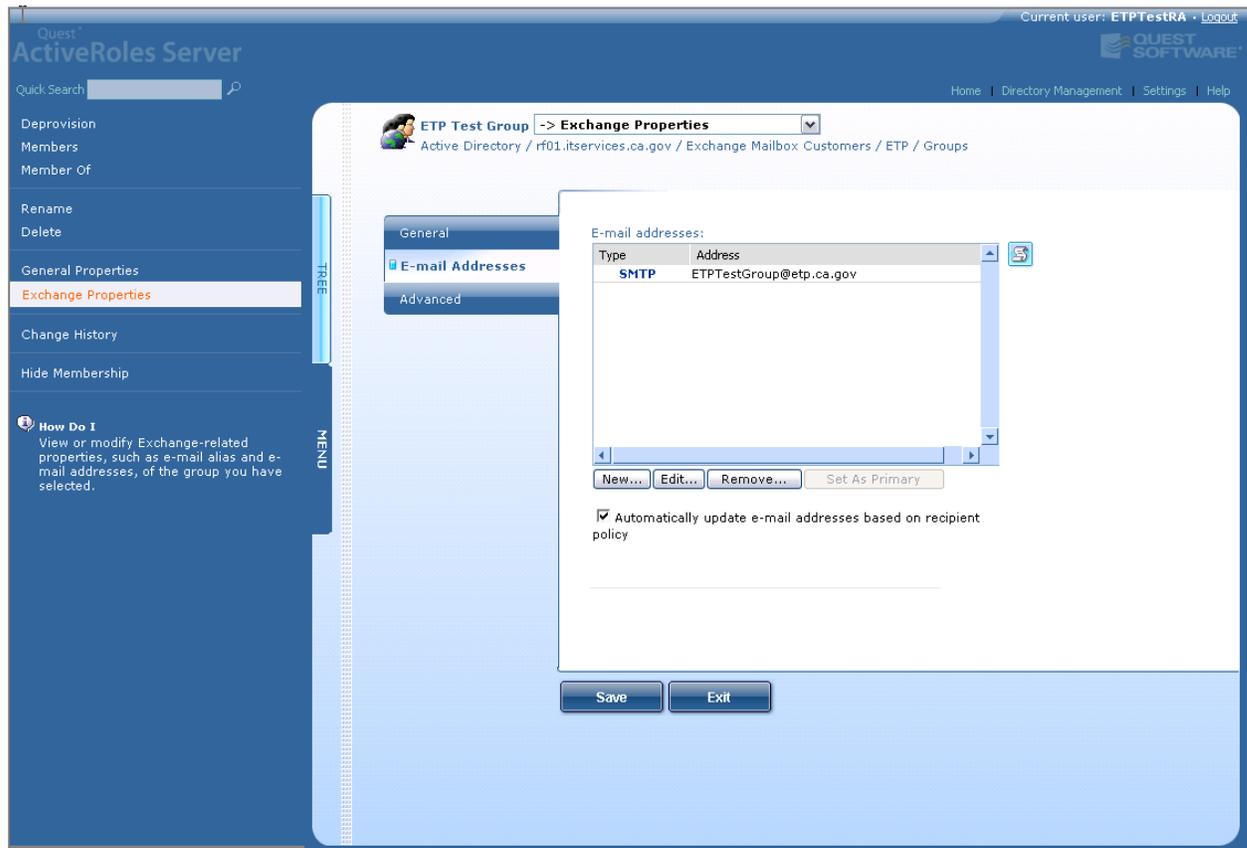
Screen will display **General Properties** of new group.



Select the **Exchange Properties**.



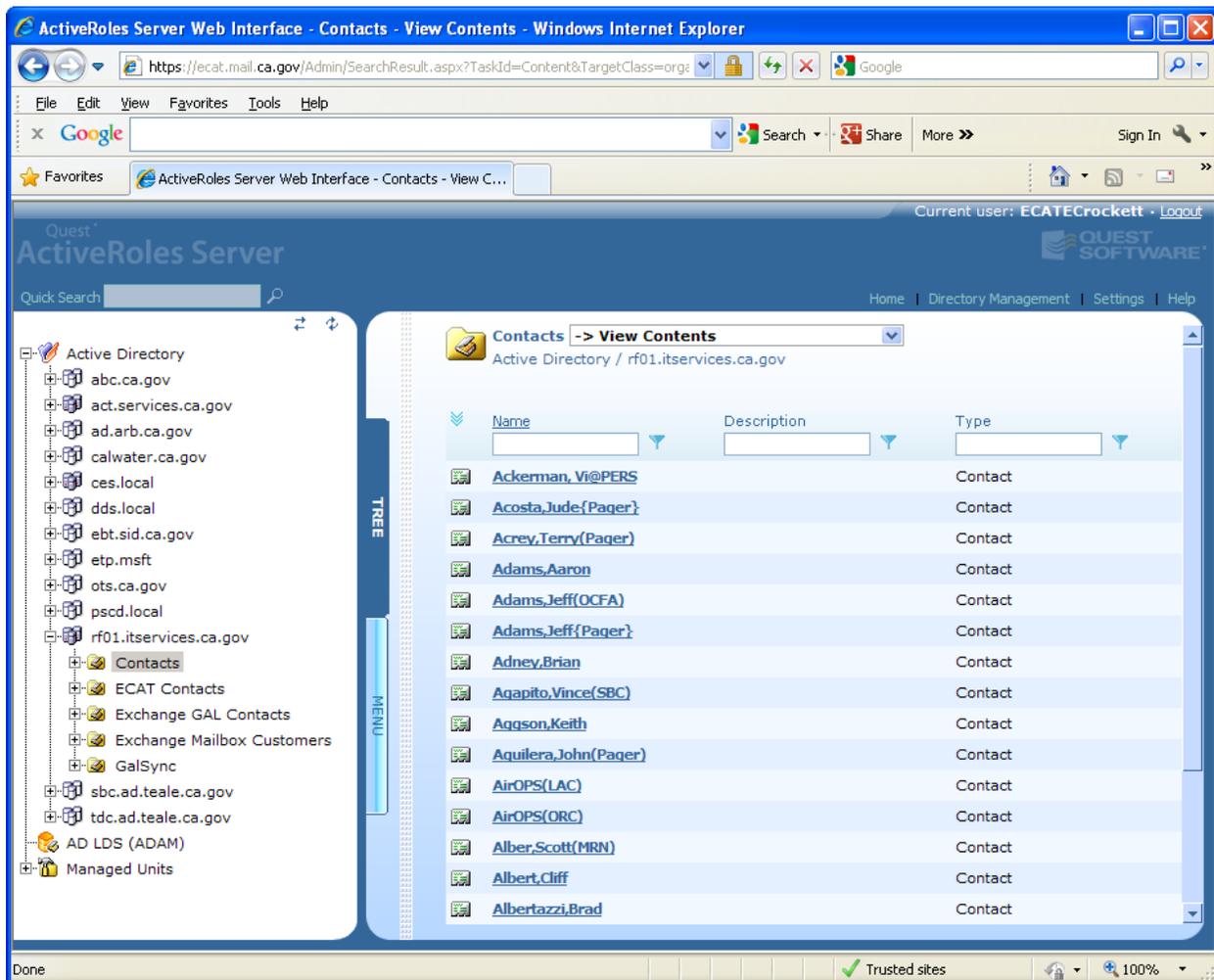
View the SMTP address in the **Exchange Properties, E-Mail Addresses** selection.



## Create a New Contact Item

In the left column, in the **Tree View**, expand down through the **rf01.itservices.ca.gov/Contacts**.

Then select the **Menu** tab.

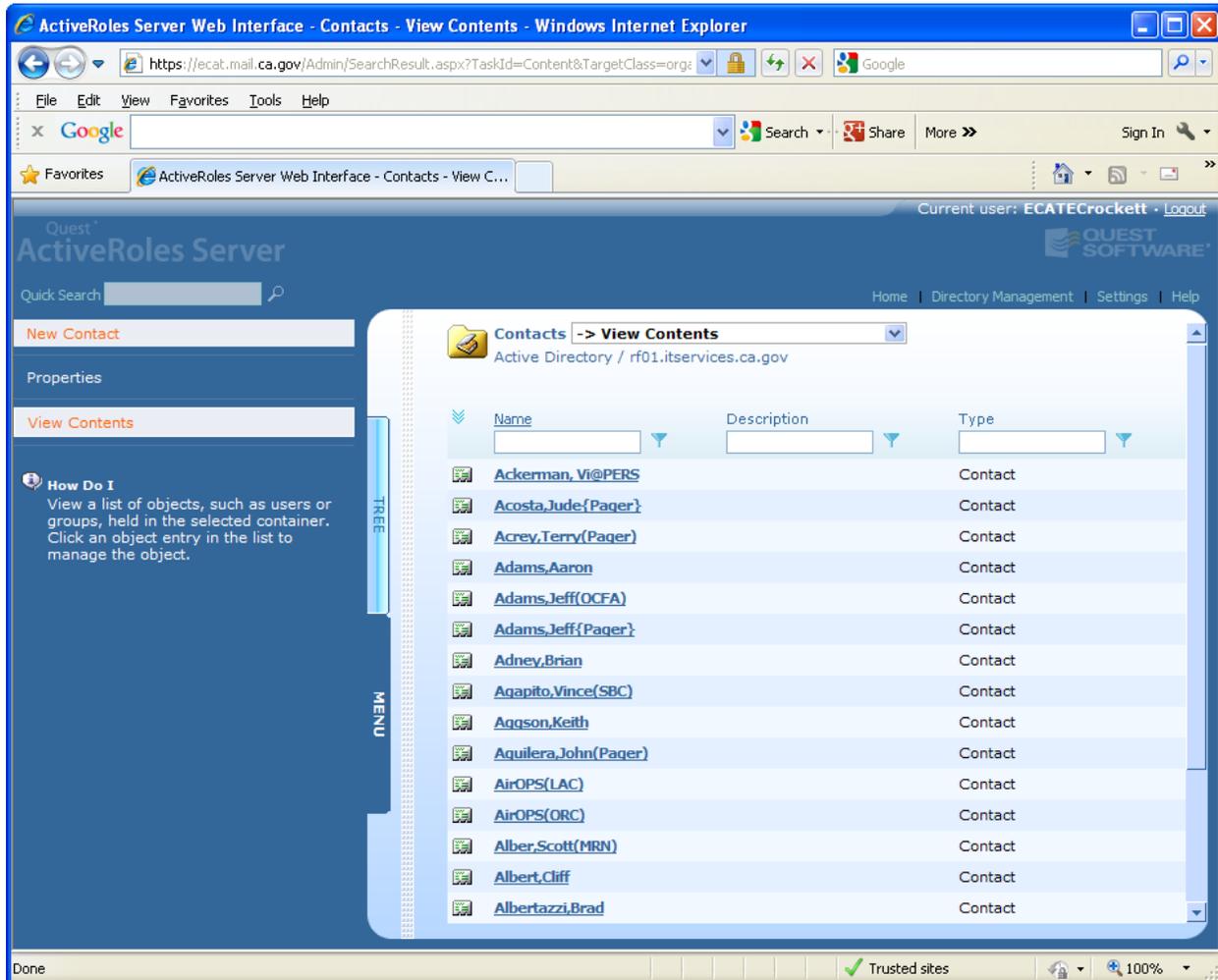


The screenshot displays the ActiveRoles Server Web Interface in Internet Explorer. The browser address bar shows the URL: <https://ecat.mail.ca.gov/Admin/SearchResult.aspx?TaskId=Content&TargetClass=org>. The page title is "ActiveRoles Server Web Interface - Contacts - View Contents - Windows Internet Explorer".

The interface features a "Tree View" on the left and a "Menu" tab on the right. The "Tree View" shows a hierarchical structure of Active Directory domains, with "rf01.itservices.ca.gov" expanded to show "Contacts". The "Menu" tab displays a list of contacts with the following columns: Name, Description, and Type.

Name	Description	Type
<a href="#">Ackerman, Vi@PERS</a>		Contact
<a href="#">Acosta, Jude (Pager)</a>		Contact
<a href="#">Acrey, Terry (Pager)</a>		Contact
<a href="#">Adams, Aaron</a>		Contact
<a href="#">Adams, Jeff (OCFA)</a>		Contact
<a href="#">Adams, Jeff (Pager)</a>		Contact
<a href="#">Adney, Brian</a>		Contact
<a href="#">Aqapito, Vince (SBC)</a>		Contact
<a href="#">Aqason, Keith</a>		Contact
<a href="#">Aquilera, John (Pager)</a>		Contact
<a href="#">AirOPS (LAC)</a>		Contact
<a href="#">AirOPS (ORC)</a>		Contact
<a href="#">Alber, Scott (MRN)</a>		Contact
<a href="#">Albert, Cliff</a>		Contact
<a href="#">Albertazzi, Brad</a>		Contact

Select **New Contact** from the Command Menu on left side of screen.



The screenshot shows the ActiveRoles Server Web Interface in Internet Explorer. The browser address bar displays <https://ecat.mail.ca.gov/Admin/SearchResult.aspx?TaskId=Content&TargetClass=org>. The page title is "ActiveRoles Server Web Interface - Contacts - View Contents".

The interface includes a "Quick Search" field and a "Current user: ECATCrockett" status bar. The left sidebar contains a "New Contact" button and a "How Do I" section with the text: "View a list of objects, such as users or groups, held in the selected container. Click an object entry in the list to manage the object."

The main content area displays a table of contacts under the heading "Contacts -> View Contents" for the Active Directory "rf01.itsservices.ca.gov". The table has columns for Name, Description, and Type. The contacts listed are:

Name	Description	Type
<a href="#">Ackerman, Vi@PERS</a>		Contact
<a href="#">Acosta, Jude{Pager}</a>		Contact
<a href="#">Acrey, Terry{Pager}</a>		Contact
<a href="#">Adams, Aaron</a>		Contact
<a href="#">Adams, Jeff{OCFA}</a>		Contact
<a href="#">Adams, Jeff{Pager}</a>		Contact
<a href="#">Adney, Brian</a>		Contact
<a href="#">Aqapito, Vince{SBC}</a>		Contact
<a href="#">Aqason, Keith</a>		Contact
<a href="#">Aquilera, John{Pager}</a>		Contact
<a href="#">AirOPS{LAC}</a>		Contact
<a href="#">AirOPS{ORC}</a>		Contact
<a href="#">Alber, Scott{MRN}</a>		Contact
<a href="#">Albert, Cliff</a>		Contact
<a href="#">Albertazzi, Brad</a>		Contact

Populate the **First name:** and **Last name:** fields. ECAT Policy configures the **Name:** and **Display name:** fields. Edit as needed by appending some meaningful description of the contact item after the @ sign.

**NOTE:** No numbers, spaces or special characters allowed and must be at least 3 character.

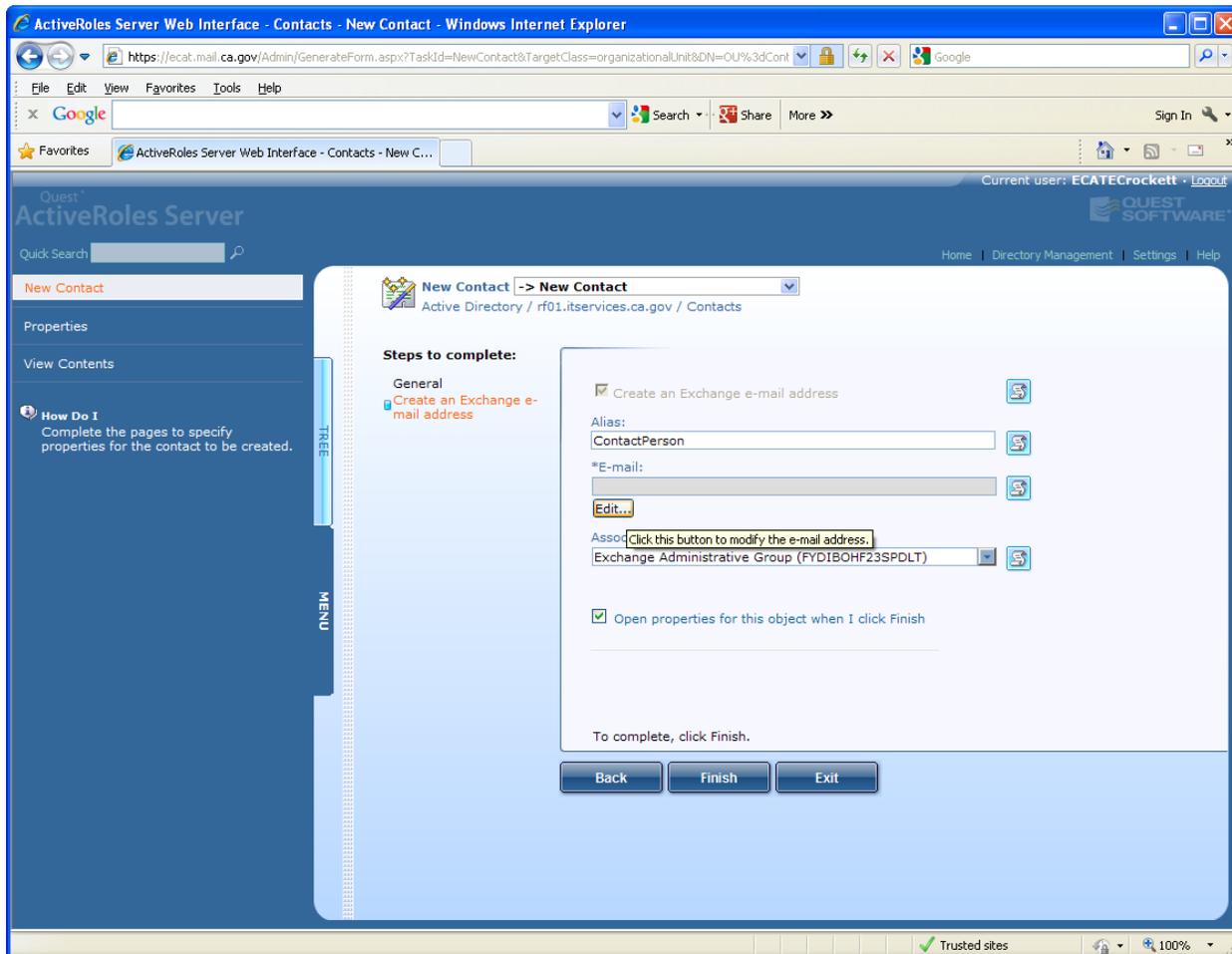
Then click **Next**.

The screenshot shows the 'New Contact' form in the ActiveRoles Server Web Interface. The form is titled 'New Contact' and is located in the 'Active Directory / rf01.itservices.ca.gov / Contacts' section. The form includes the following fields:

- First name:** Contact
- Last name:** Person
- Initials:** (empty)
- Name:** Person, Contact@TEST
- Display name:** Person, Contact@TEST

The 'Name' and 'Display name' fields are pre-filled with 'Person, Contact@TEST'. The 'Next' button is highlighted, indicating that the user should click it to proceed.

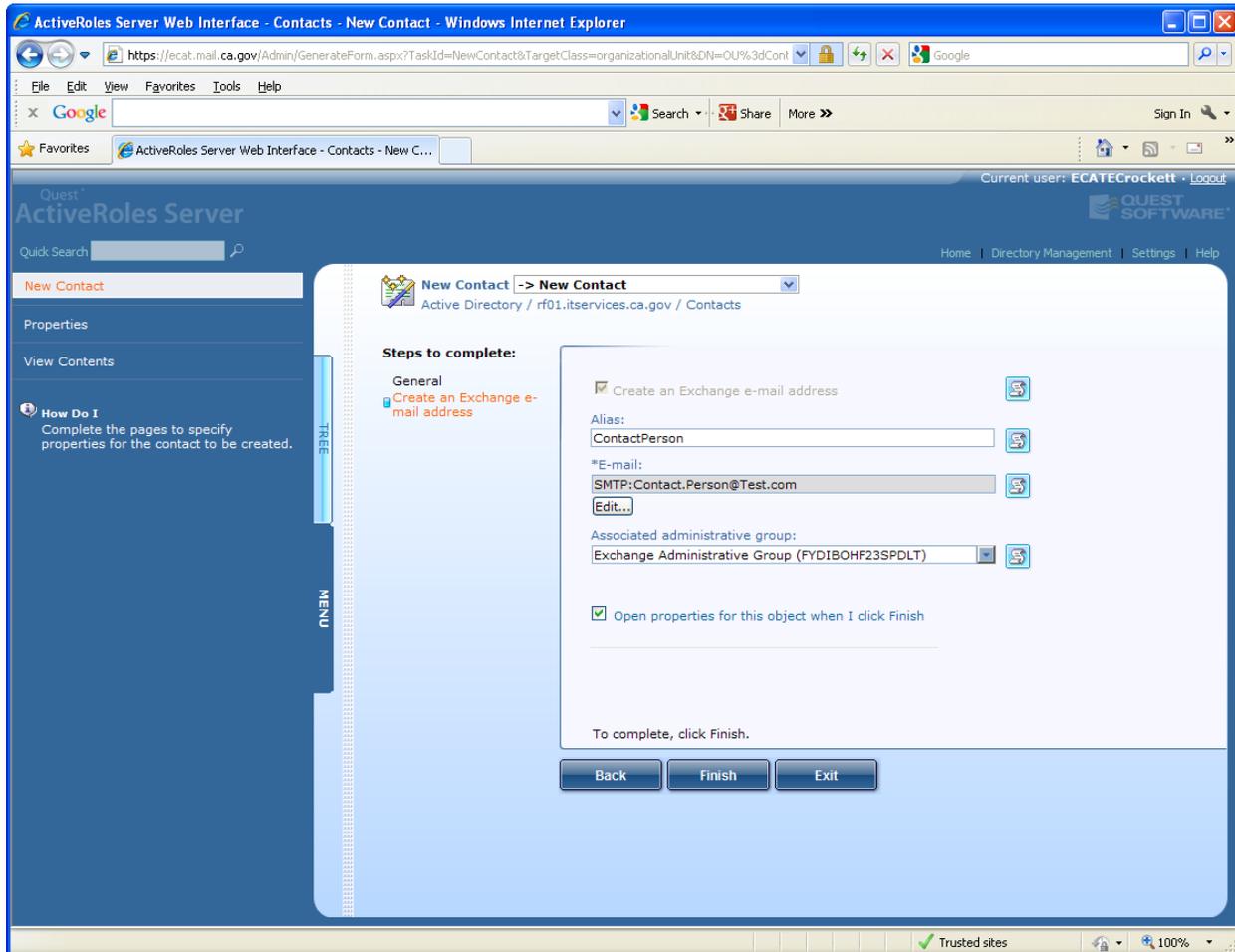
At the “**Create an Exchange e-mail address**” screen, click the **Edit...** button to type the email address of the new contact item.



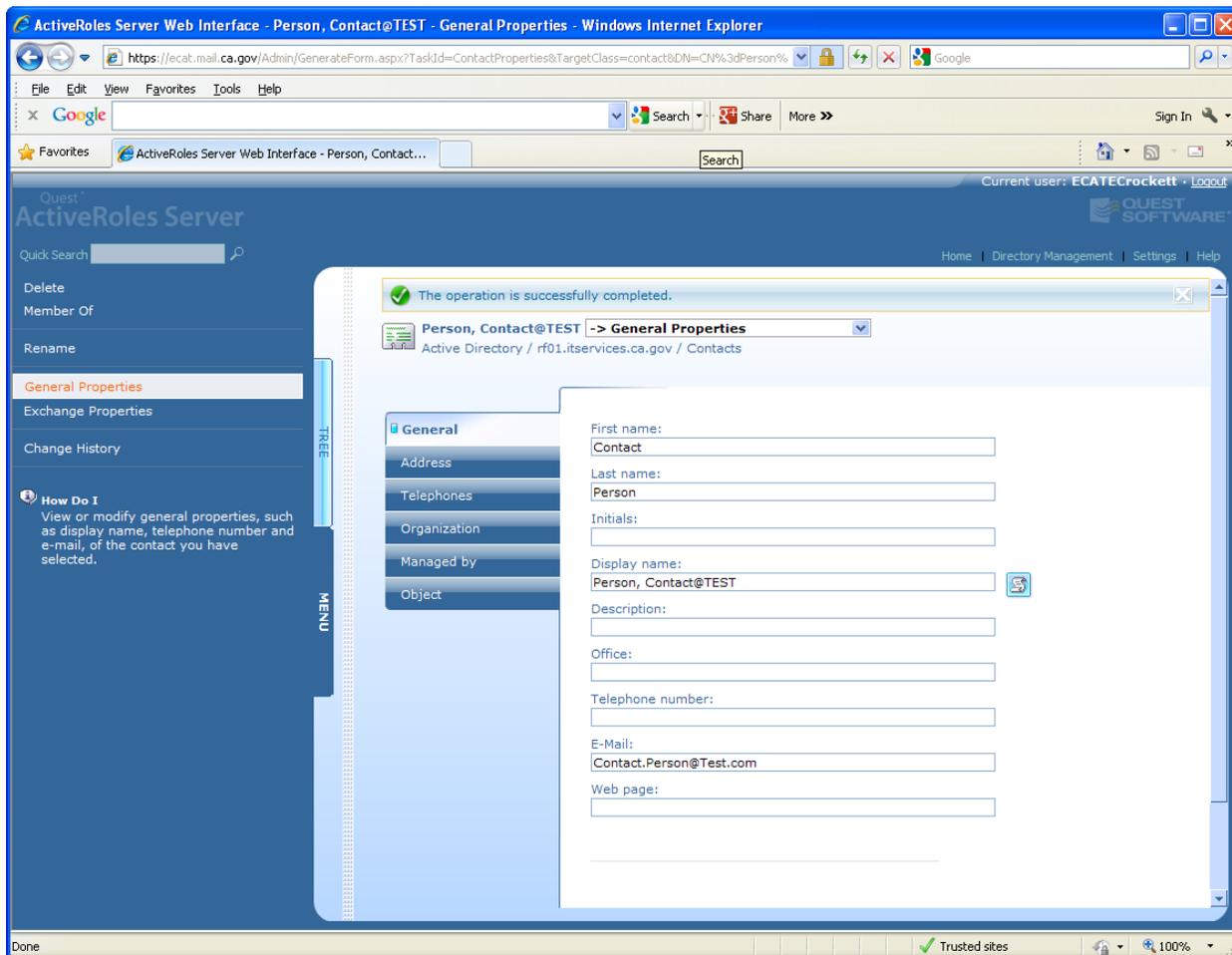
Select **SMTP Address** from the **E-mail address type**:. Type the email address as required in the **\*E-mail address box**:. Then click **OK**.

The screenshot shows a dialog box titled "E-mail Address" with a close button in the top right corner. Inside the dialog, there is a section labeled "E-mail address type:" followed by a list box containing the following items: "cc:MailAddress", "Custom Address", "MacMail Address", "Microsoft Mail Address", "SMTP Address" (which is highlighted with a grey background), and "X.400 Address". Below this list is a text input field labeled "\*E-mail address:" containing the text "Contact.Person@Test.com". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Then click **Finish** to complete the new contact procedure.



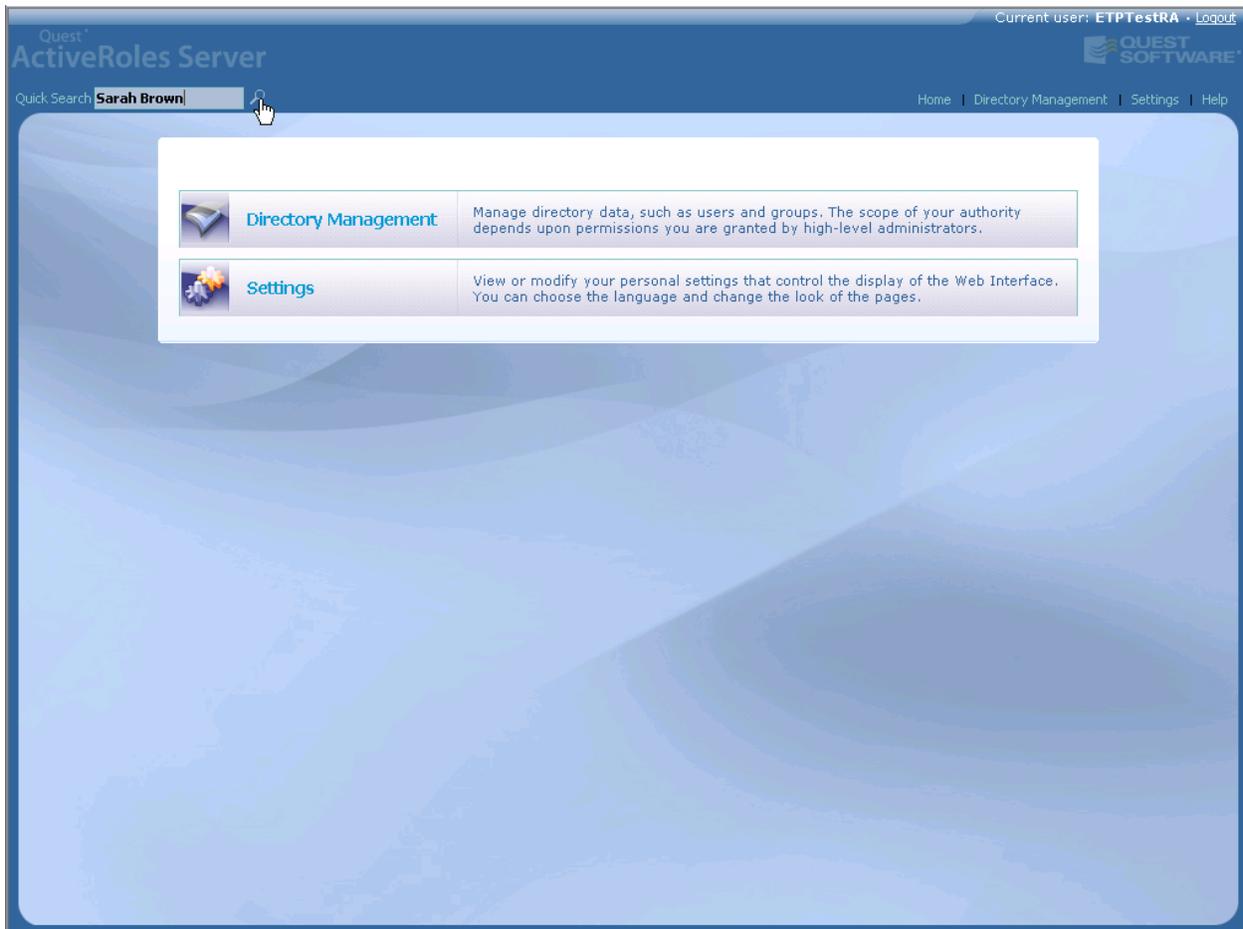
The **General Properties** command page will display a success message for completion of the New Contact procedure.



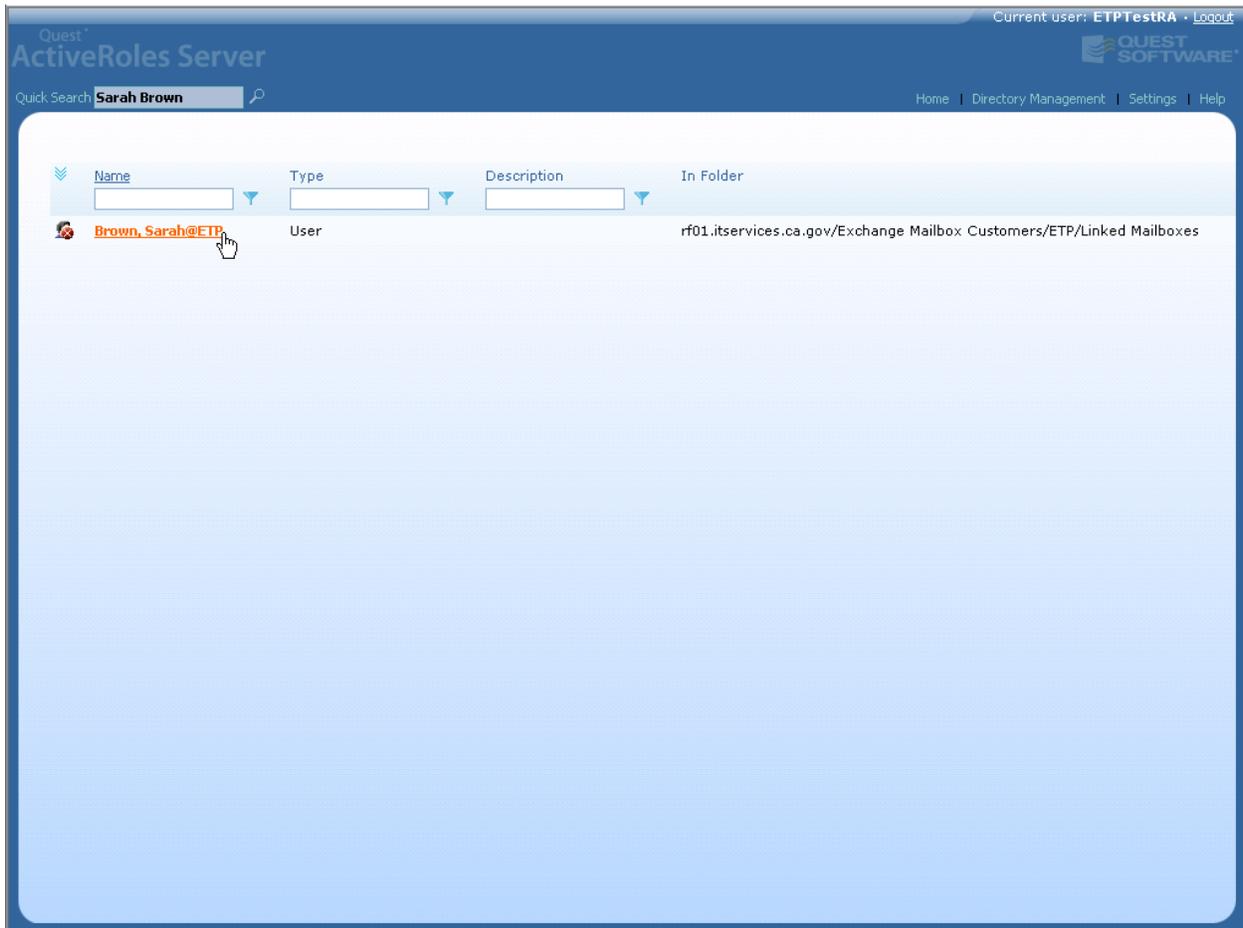
## Rename a Mailbox Account

Logon to the ECAT web interface with your ECAT administrator account. (e.g., *xAdmFirstInitialLastname*).

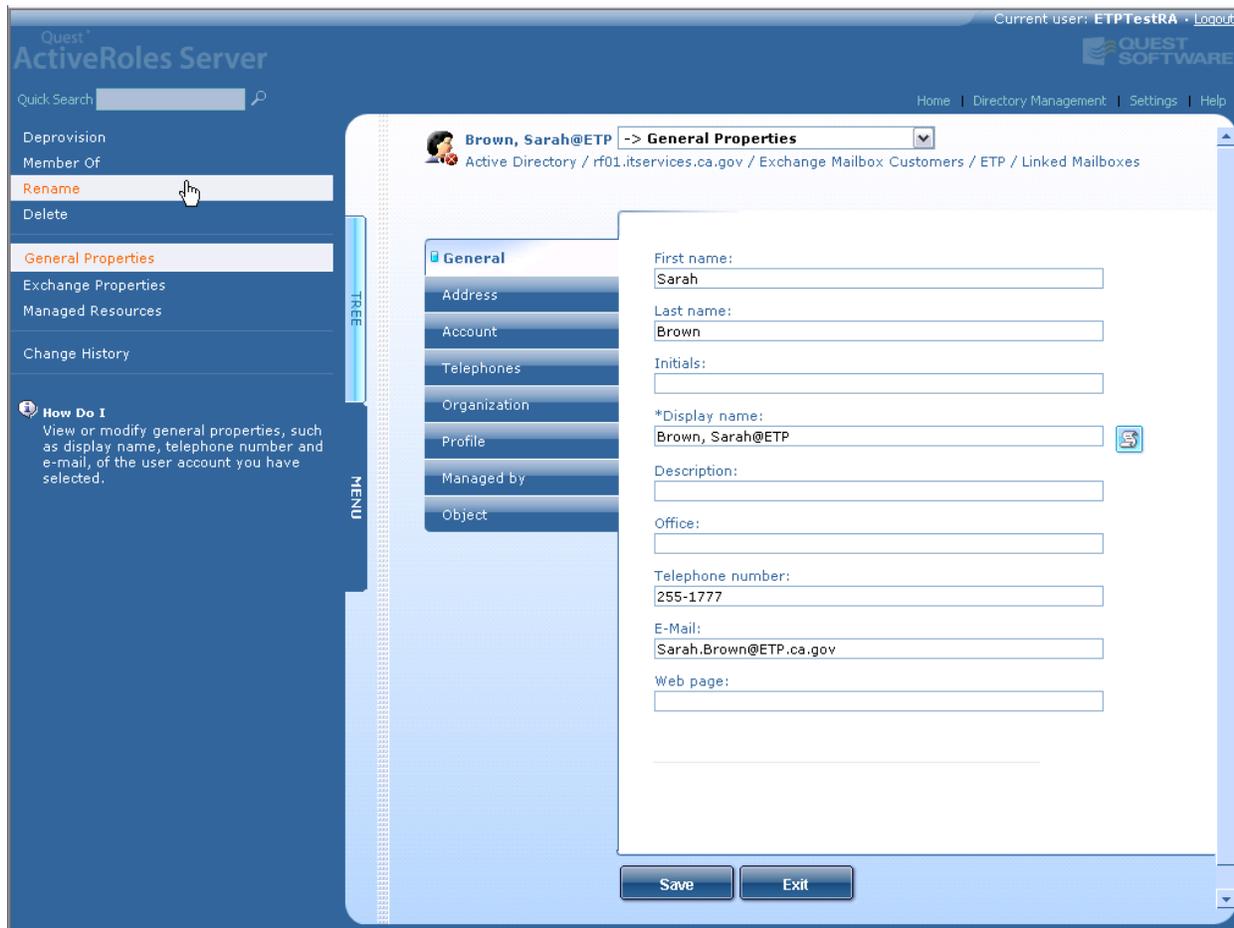
At the **Home** page, in the **Quick Search** box, type in the name of the user whose mailbox needs to be renamed and select the search icon .



From the search results window, select the mailbox account you were searching for...

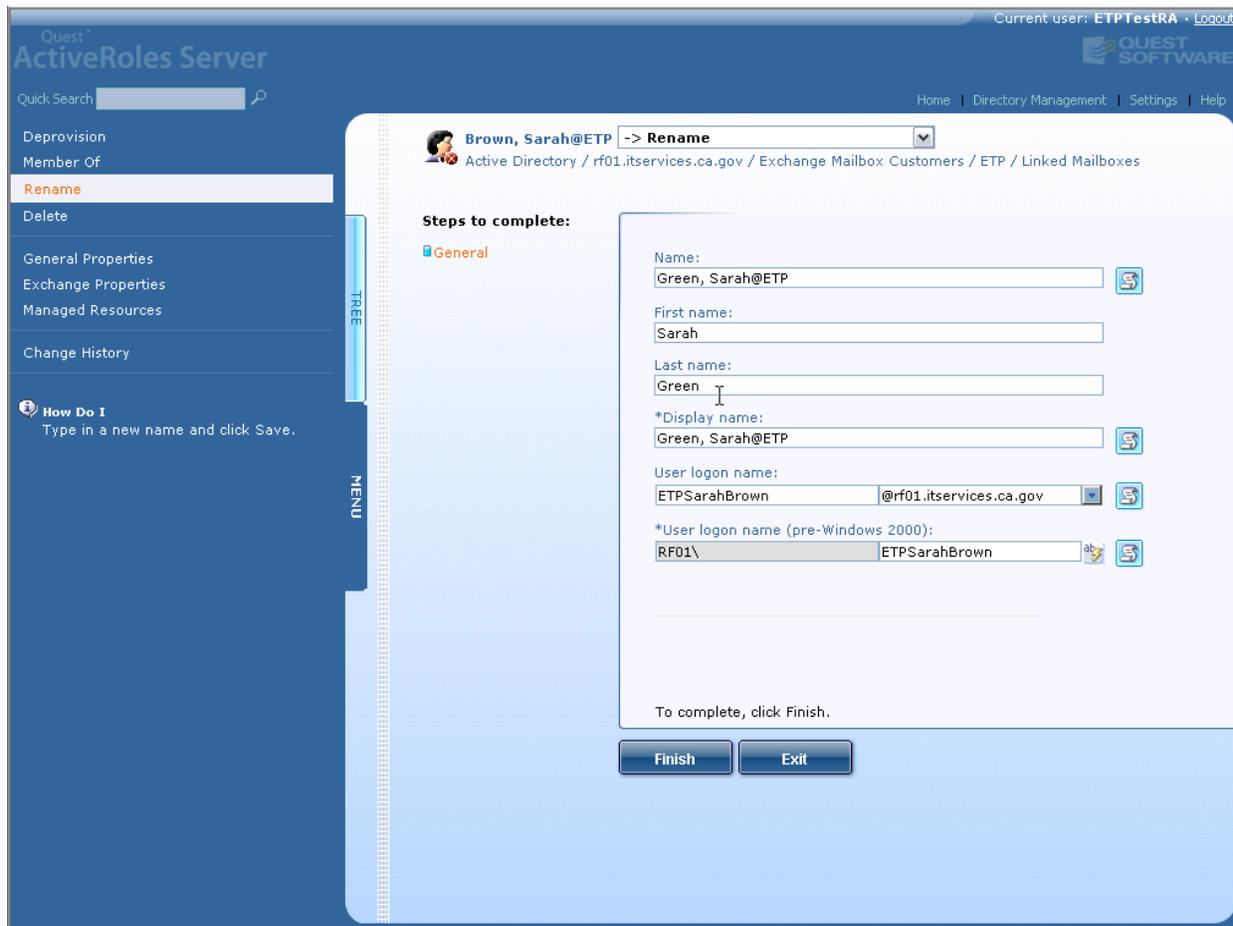


When the mailbox account displays on the screen, click the **Rename** command from the command menu on the left.



From the **Rename** window, edit the “**First name:**” and/or “**Last name:**” fields accordingly...

\*\* Notice that the “**Name:**” field and “**\*Display name:**” field both change automatically to reflect the name change.

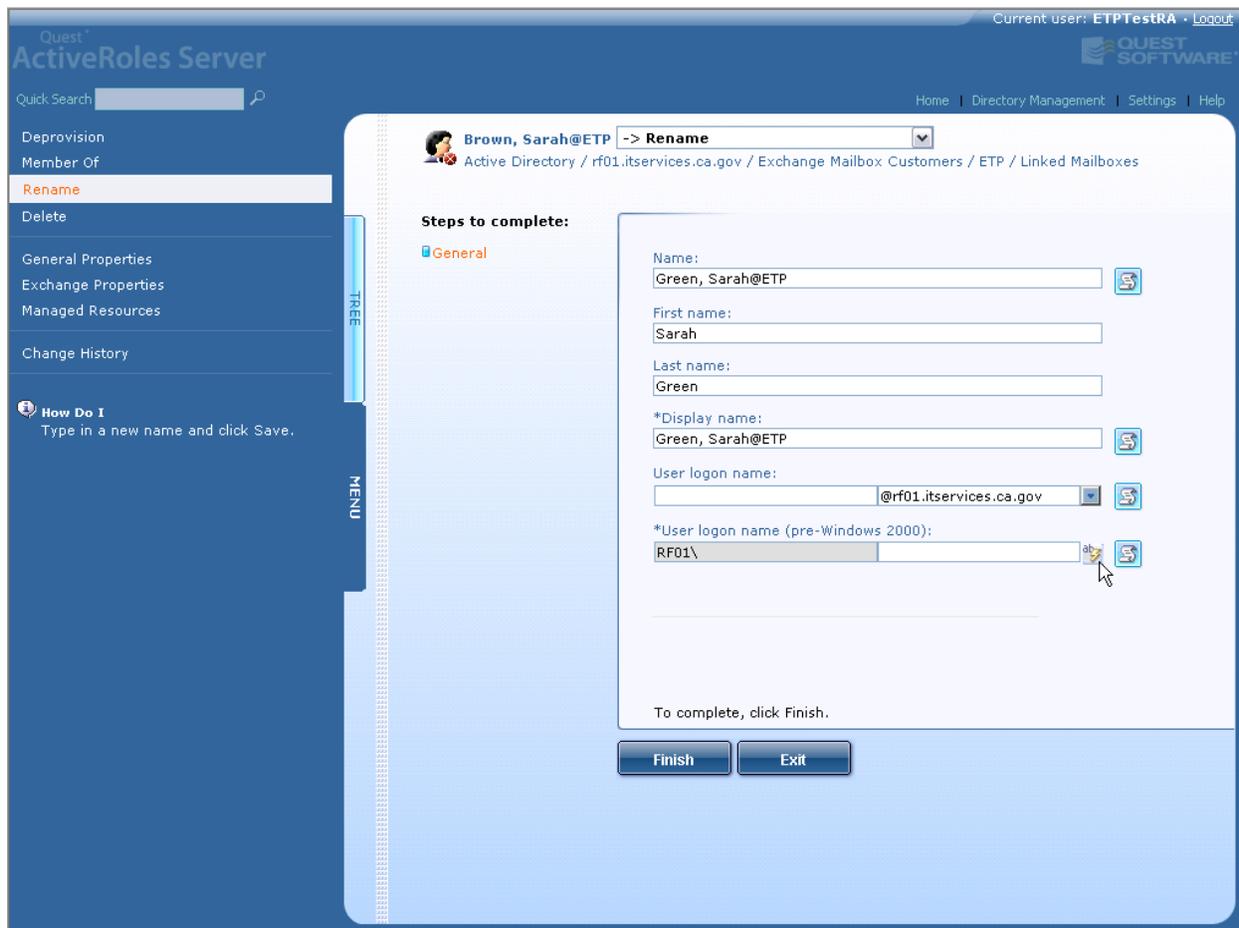


Highlight the **\*User logon name (Pre-Windows 2000):** field and click delete to clear the field.

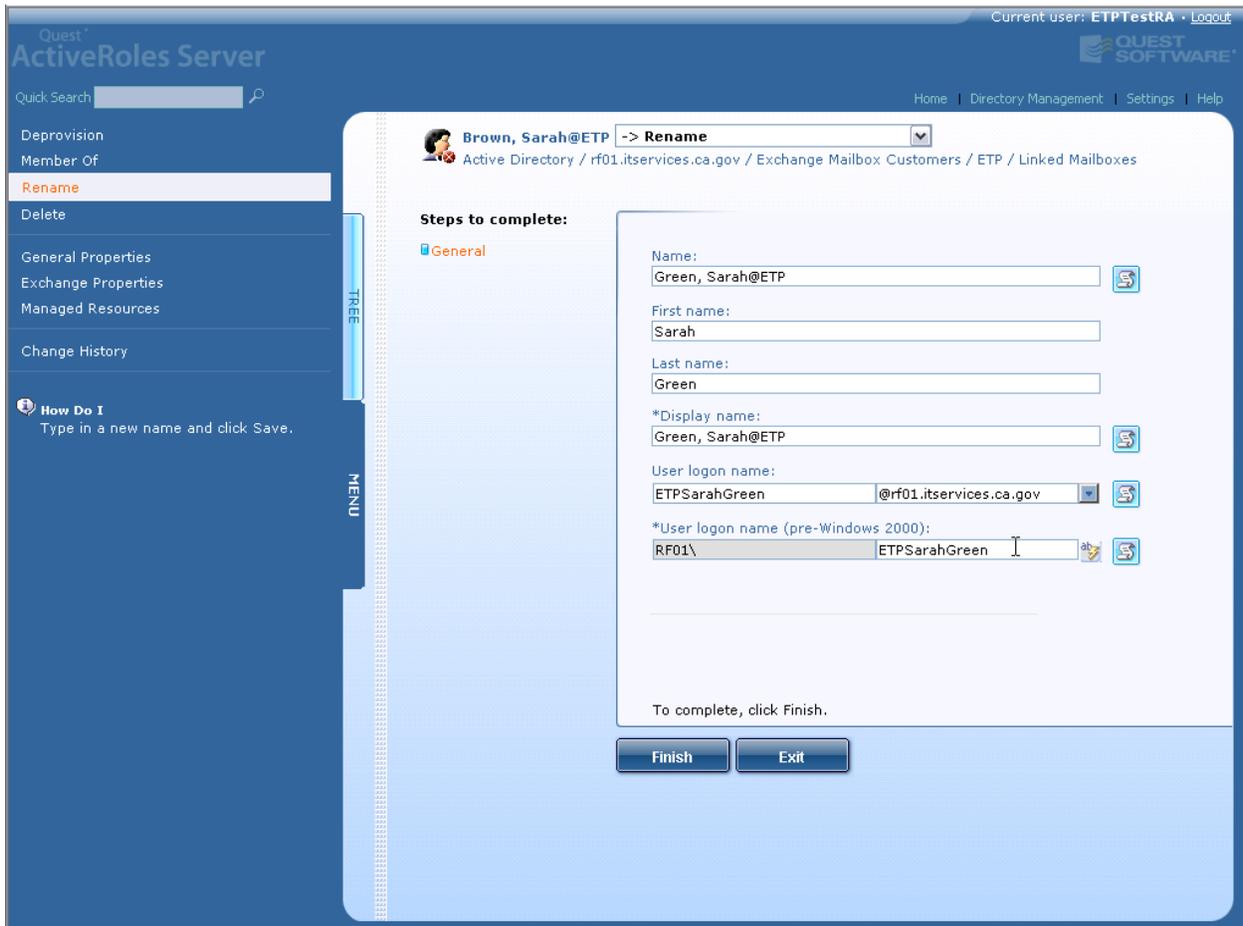
This will also clear the **User logon name:** field.

The screenshot displays the Quest ActiveRoles Server web interface. The top navigation bar includes the Quest logo, 'ActiveRoles Server', a search bar, and the current user 'ETPTestRA' with a 'Logout' link. The left sidebar contains a 'MENU' with options: 'Deprovision', 'Member Of', 'Rename' (highlighted), 'Delete', 'General Properties', 'Exchange Properties', 'Managed Resources', and 'Change History'. Below the menu is a 'How Do I' section with the instruction 'Type in a new name and click Save.' The main content area shows the 'Rename' page for user 'Brown, Sarah@ETP'. The breadcrumb trail is 'Active Directory / rf01.itservices.ca.gov / Exchange Mailbox Customers / ETP / Linked Mailboxes'. Under 'Steps to complete:', the 'General' tab is active. The form contains the following fields: 'Name:' (Green, Sarah@ETP), 'First name:' (Sarah), 'Last name:' (Green), '\*Display name:' (Green, Sarah@ETP), 'User logon name:' (ETPSarahBrown @rf01.itservices.ca.gov), and '\*User logon name (pre-Windows 2000):' (RF01\ETPSarahBrown). At the bottom, there are 'Finish' and 'Exit' buttons. A note at the bottom of the form states 'To complete, click Finish.'

Once the fields are empty, select the Icon  to regenerate the **User logon name:** and **\*User logon name (pre-Windows 2000):** that will reflect the name change for this person.



Then click **Finish**



Once back on the **General Properties** of the renamed mailbox account...

Select the **Exchange Properties, E-mail Addresses** tab...

Then click **New...** to add a new primary **SMTP** address to reflect the name change.

The screenshot displays the Quest ActiveRoles Server web interface. The top navigation bar includes the Quest logo, the text "ActiveRoles Server", a search box, and the current user "ETPTestRA" with a "Logout" link. The main content area shows the user "Green, Sarah@ETP" with a dropdown menu set to "Exchange Properties". A left-hand menu lists various property categories, with "E-mail Addresses" selected. The "E-mail Addresses" panel contains a table with the following data:

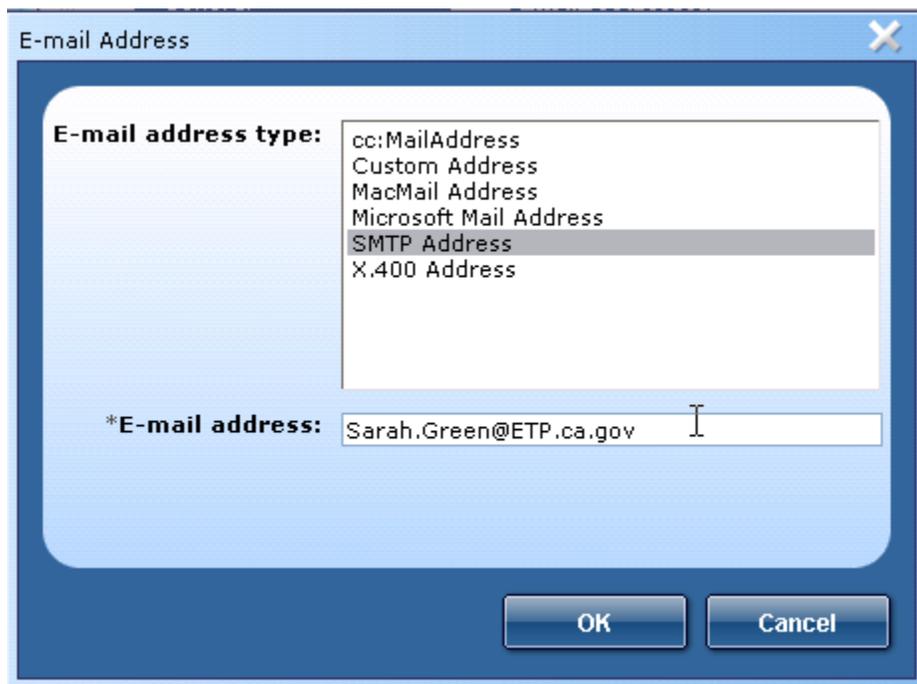
Type	Address
SMTP	Sarah.Brown@ETP.ca.gov

Below the table are buttons for "New...", "Edit...", "Remove...", and "Set As Primary". A checkbox labeled "Automatically update e-mail addresses based on recipient policy" is checked. At the bottom of the panel are "Save" and "Exit" buttons.

From the **E-mail Address** window, from the **E-mail address type:** list, select **SMTP Address**.

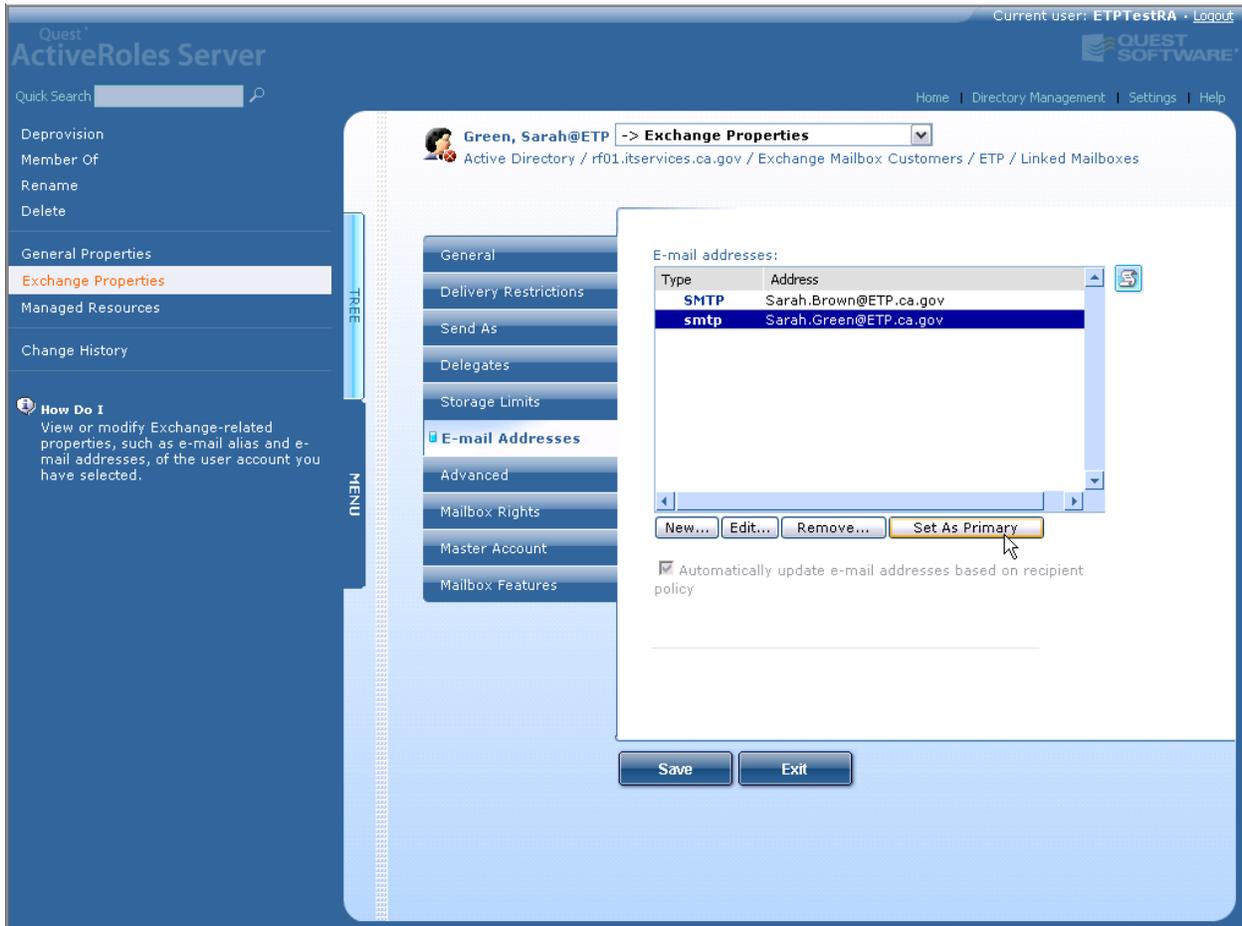
Then in the **\*E-mail address:** box, type the user's email address following CA.Mail standards of [Firstname.Lastname@dept.ca.gov](#). (eg; Sarah.Green@ETP.ca.gov).

Then click **OK**



The screenshot shows a dialog box titled "E-mail Address". It features a list box labeled "E-mail address type:" with the following items: "cc:MailAddress", "Custom Address", "MacMail Address", "Microsoft Mail Address", "SMTP Address" (which is selected and highlighted), and "X.400 Address". Below the list box is a text input field labeled "\*E-mail address:" containing the text "Sarah.Green@ETP.ca.gov". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Then click the **Set as Primary** button to set this new address as the Primary SMTP address to reflect the name change.



The screenshot shows the Quest ActiveRoles Server web interface. The user is logged in as 'ETPTestRA'. The interface displays the 'Exchange Properties' dialog for the user 'Green, Sarah@ETP'. The 'E-mail Addresses' tab is selected, showing a table of email addresses:

Type	Address
SMTP	Sarah.Brown@ETP.ca.gov
smtp	Sarah.Green@ETP.ca.gov

The 'smtp' entry is highlighted, and the 'Set As Primary' button is being clicked. Below the table, there is a checkbox for 'Automatically update e-mail addresses based on recipient policy' which is checked. At the bottom of the dialog are 'Save' and 'Exit' buttons.

Screen will then show new address as the Primary SMTP address for this mailbox.

Click **Save** to save the changes.

Quest<sup>®</sup> ActiveRoles Server

Current user: ETPTestRA · Logout

QUEST SOFTWARE

Quick Search

Home | Directory Management | Settings | Help

Green, Sarah@ETP -> Exchange Properties

Active Directory / rf01.itservices.ca.gov / Exchange Mailbox Customers / ETP / Linked Mailboxes

Deprovision  
Member Of  
Rename  
Delete

General Properties  
**Exchange Properties**  
Managed Resources  
Change History

**How Do I**  
View or modify Exchange-related properties, such as e-mail alias and e-mail addresses, of the user account you have selected.

General  
Delivery Restrictions  
Send As  
Delegates  
Storage Limits  
**E-mail Addresses**  
Advanced  
Mailbox Rights  
Master Account  
Mailbox Features

E-mail addresses:

Type	Address
smtp	Sarah.Brown@ETP.ca.gov
<b>SMTP</b>	Sarah.Green@ETP.ca.gov

New... Edit... Remove... Set As Primary

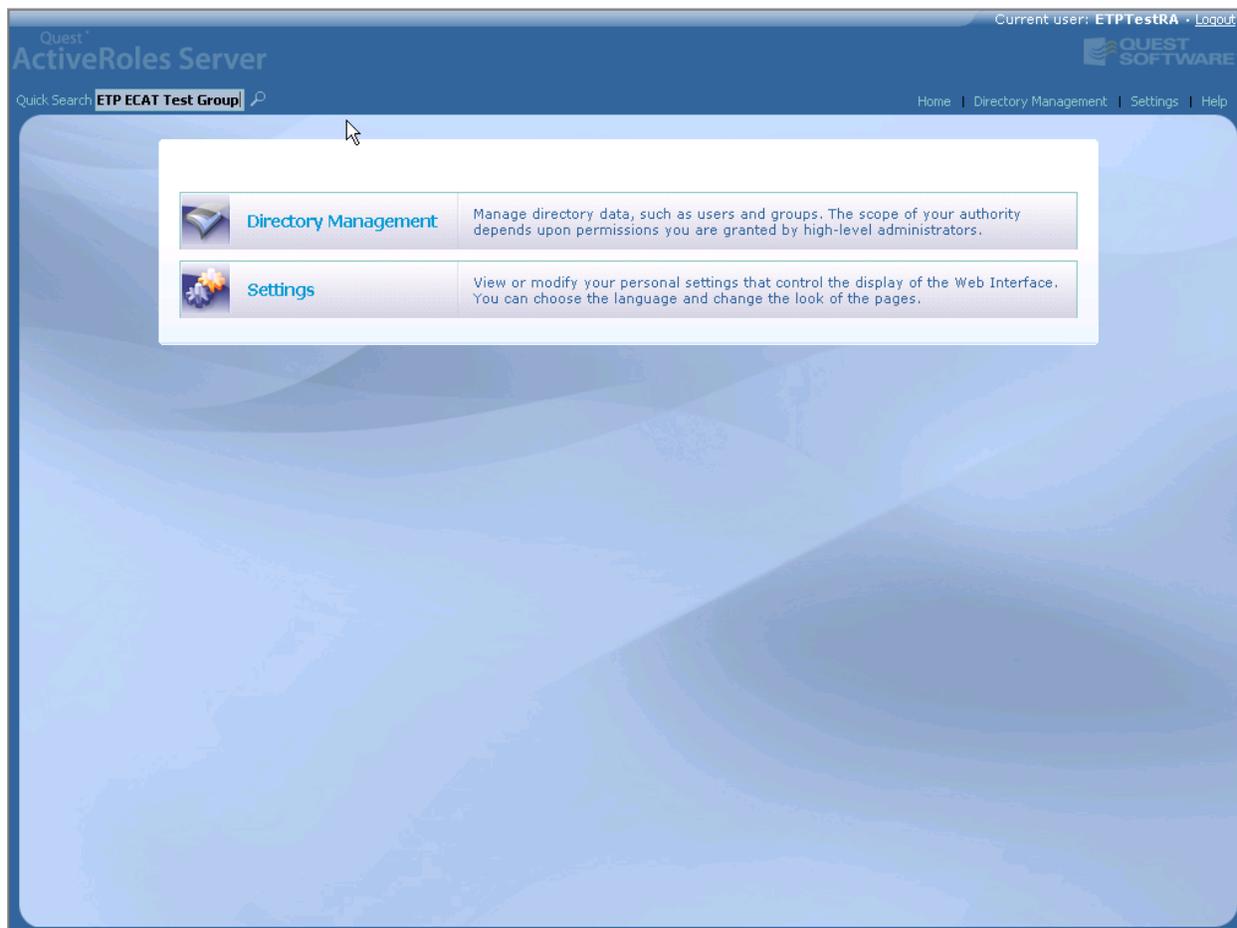
Automatically update e-mail addresses based on recipient policy

Save Exit

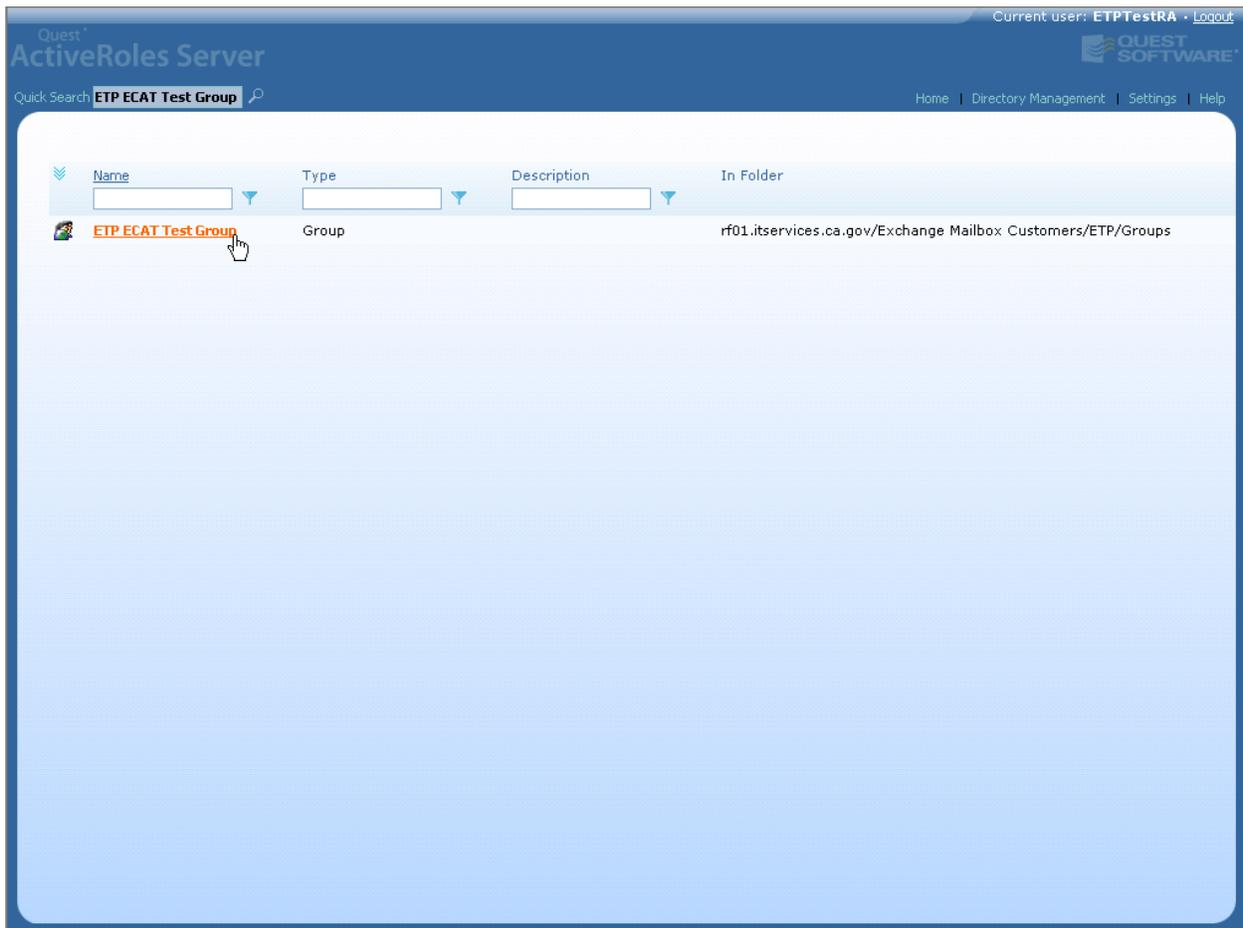
## Rename a Group (Distribution List)

Logon to the ECAT web interface with your ECAT administrator account. (e.g., *xAdmFirstInitialLastname*).

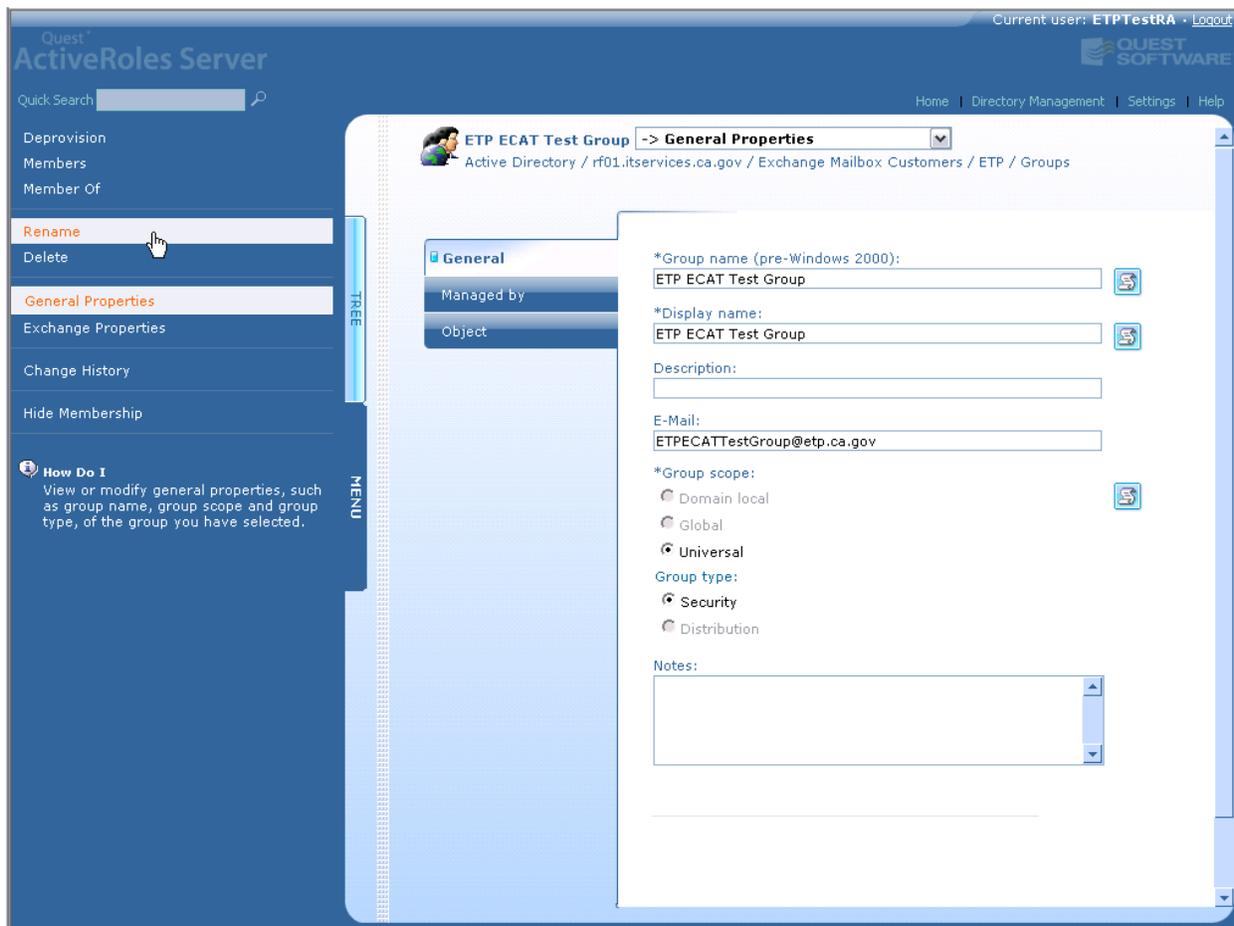
At the **Home** page, in the **Quick Search** box, type in the name of the group (Distribution List) that needs to be renamed and select the search icon .



From the search results window, select the group you were searching for...



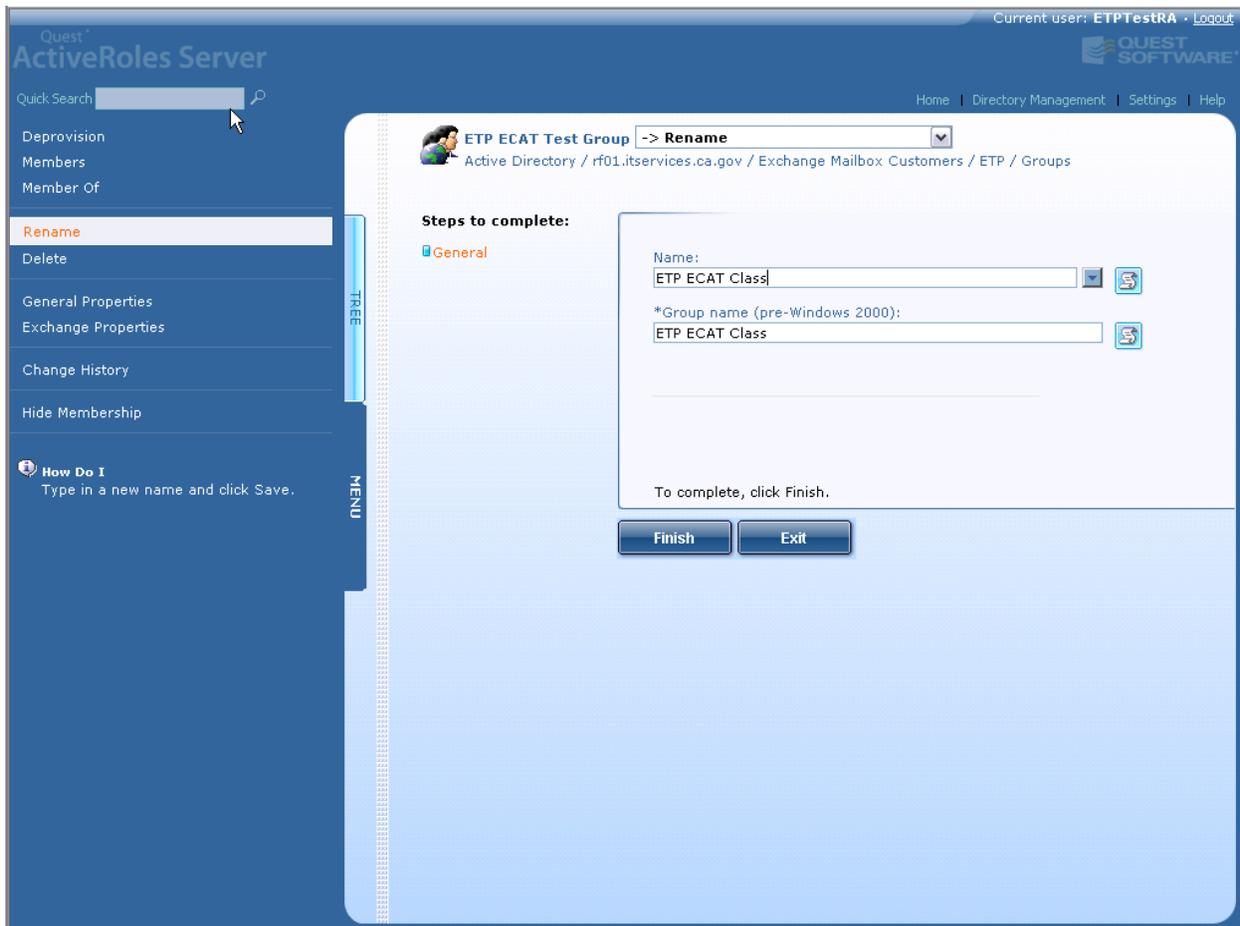
When the group displays on the screen, click the **Rename** command from the command menu on the left.



From the Rename window edit the **Name:** field as needed.

**\*\* Notice the \*Group name (pre-Windows 2000):** field also changes to reflect the edited name.

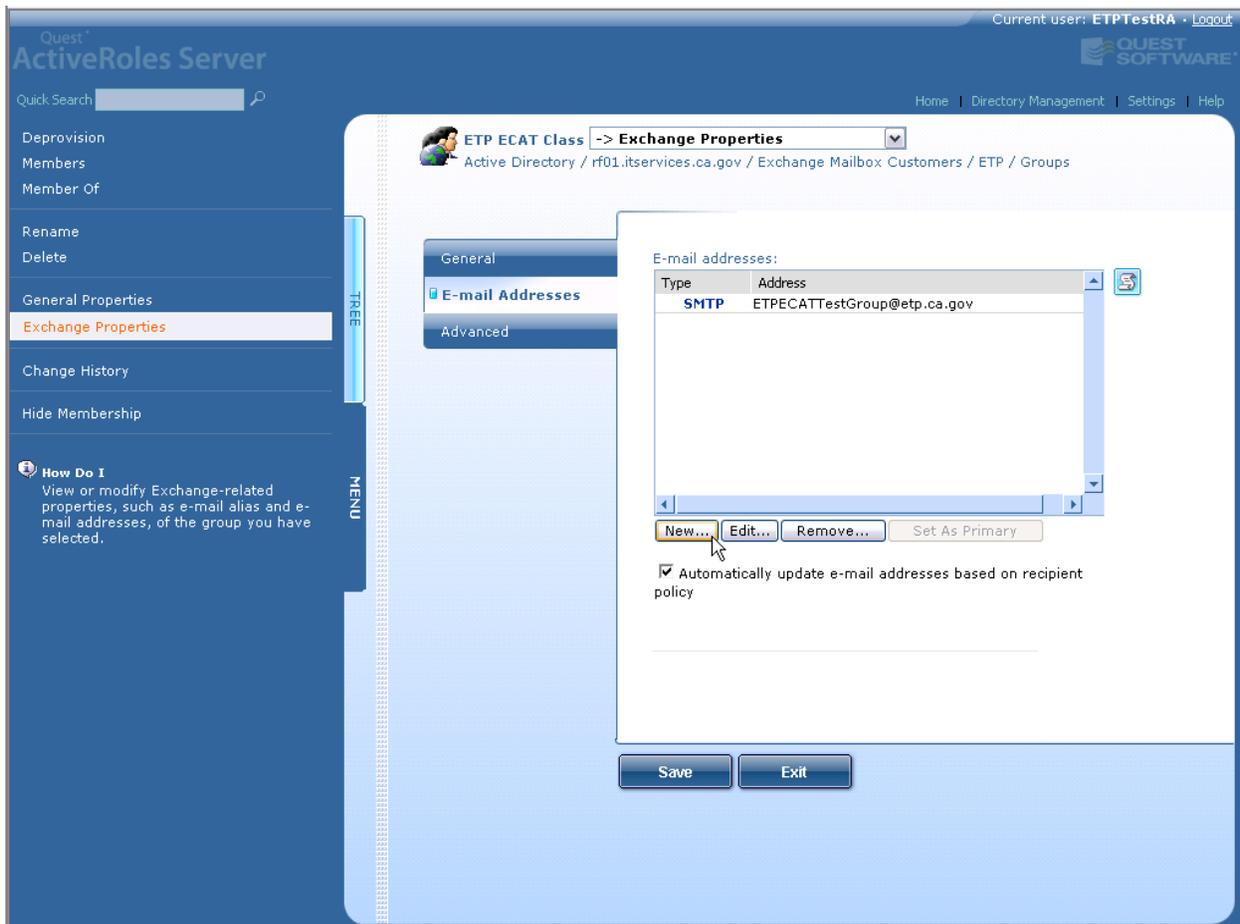
Click **Finish**



Once back on the **General Properties** of the renamed group...

Select the **Exchange Properties, E-mail Addresses** tab...

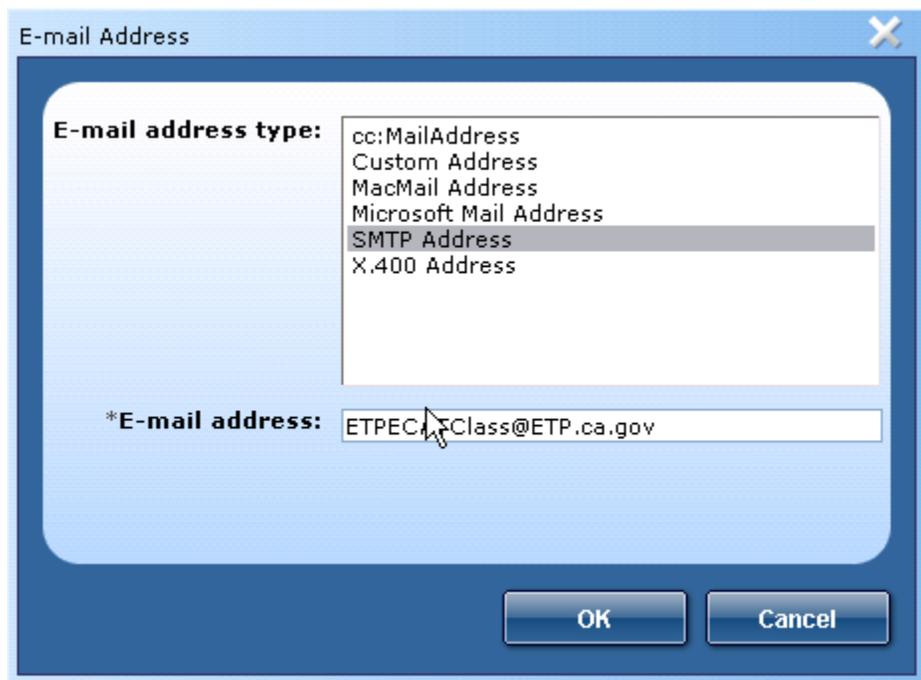
Then click **New...** to add a new primary **SMTP** address to reflect the name change.



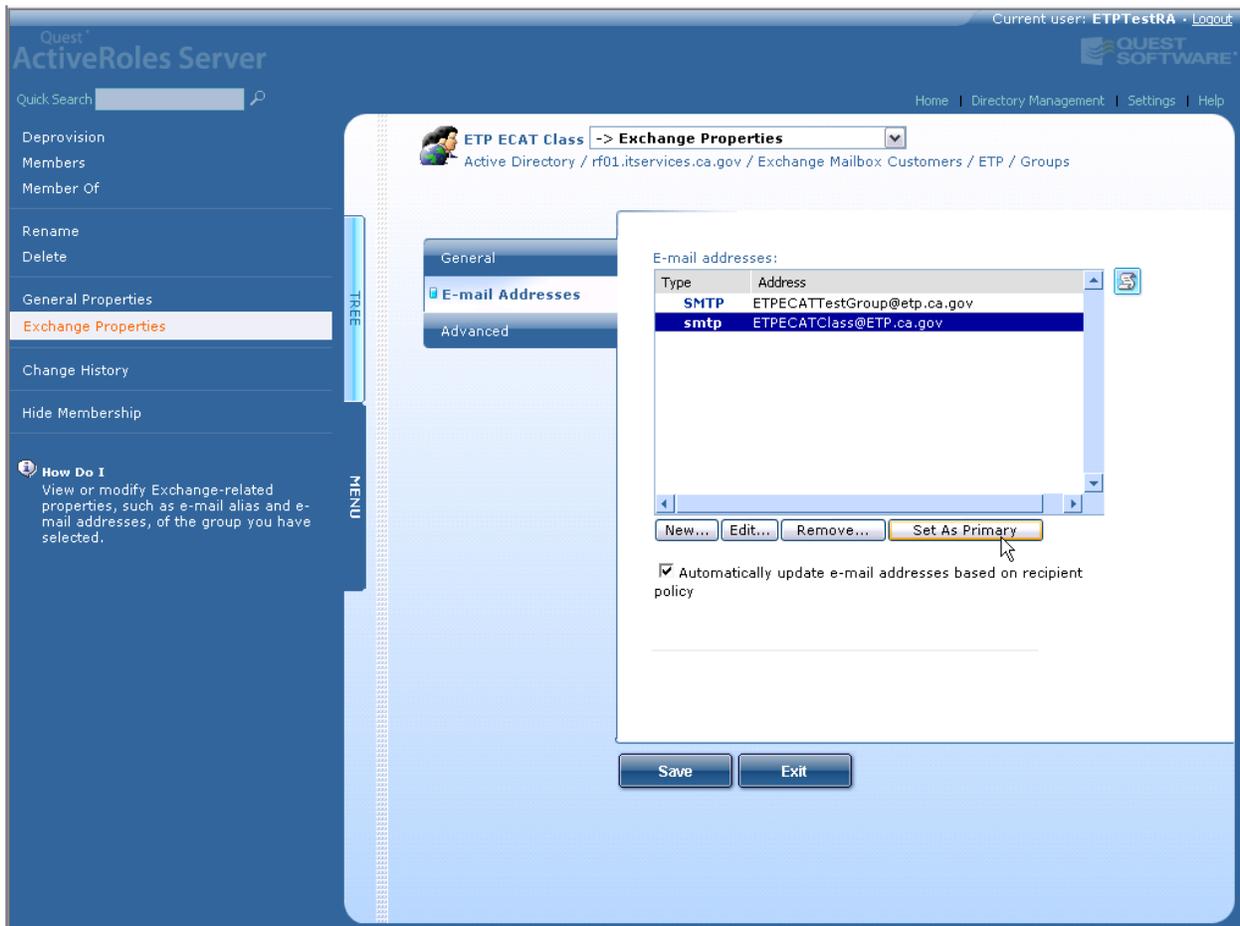
At the **E-mail Address** window, from the **E-mail address type:** list, select **SMTP Address**.

Then in the **\*E-mail address:** box, type the group's email address following CA.Mail standards of Groupname@ETP.ca.gov (eg; ETPECATClass@ETP.ca.gov).

Then click **OK**



Then click the **Set as Primary** button to set this new address as the Primary SMTP address to reflect the name change.



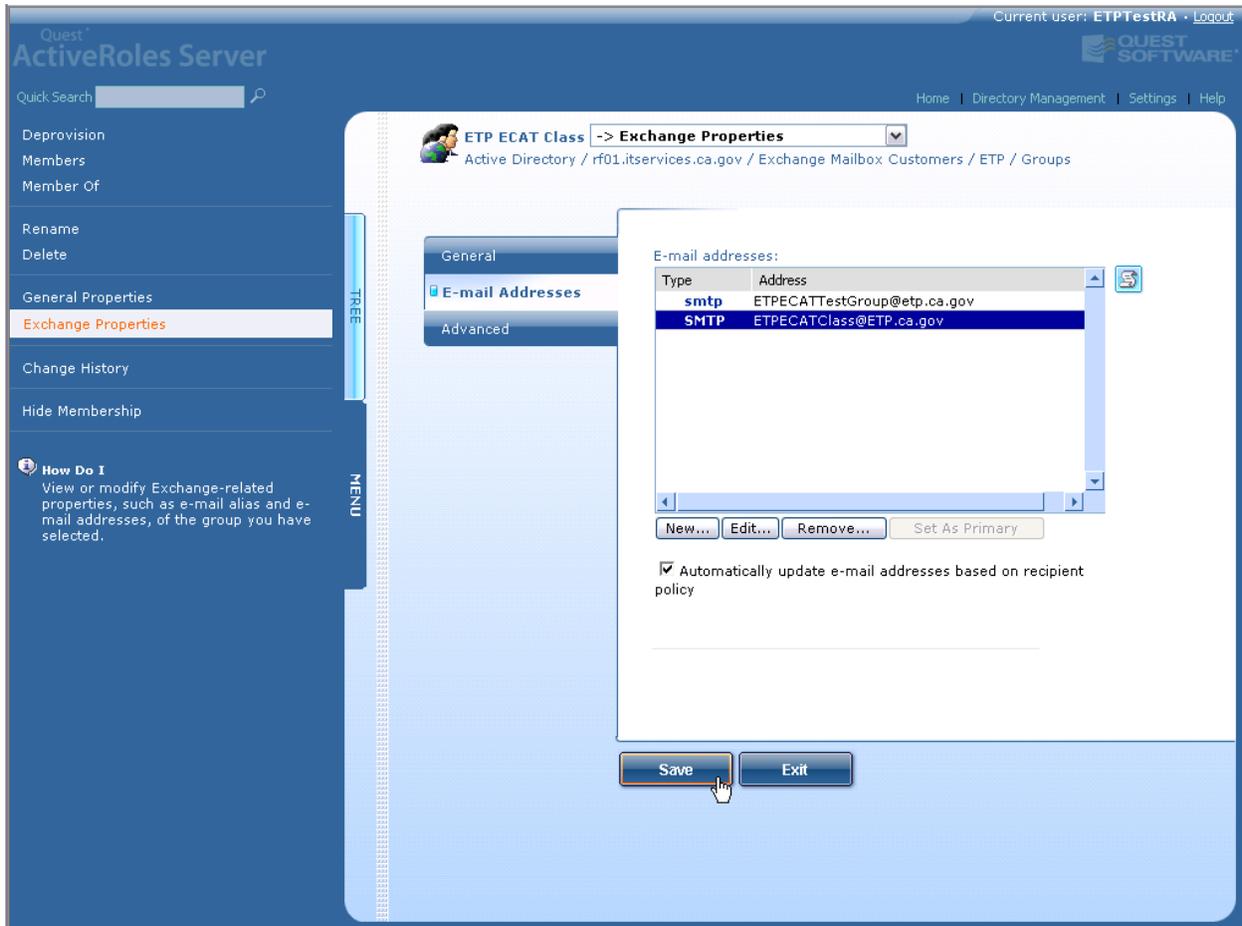
The screenshot shows the Quest ActiveRoles Server web interface. The current user is ETPTestRA. The interface displays the 'Exchange Properties' dialog for the 'ETP ECAT Class' group. The 'E-mail Addresses' tab is selected, showing a table of email addresses:

Type	Address
SMTP	ETPECATTestGroup@etp.ca.gov
smtp	ETPECATClass@ETP.ca.gov

Below the table, there are buttons for 'New...', 'Edit...', 'Remove...', and 'Set As Primary'. The 'Set As Primary' button is highlighted, indicating it is being clicked. A checkbox labeled 'Automatically update e-mail addresses based on recipient policy' is checked. At the bottom of the dialog, there are 'Save' and 'Exit' buttons.

Screen will then show new address as the Primary SMTP address for this group.

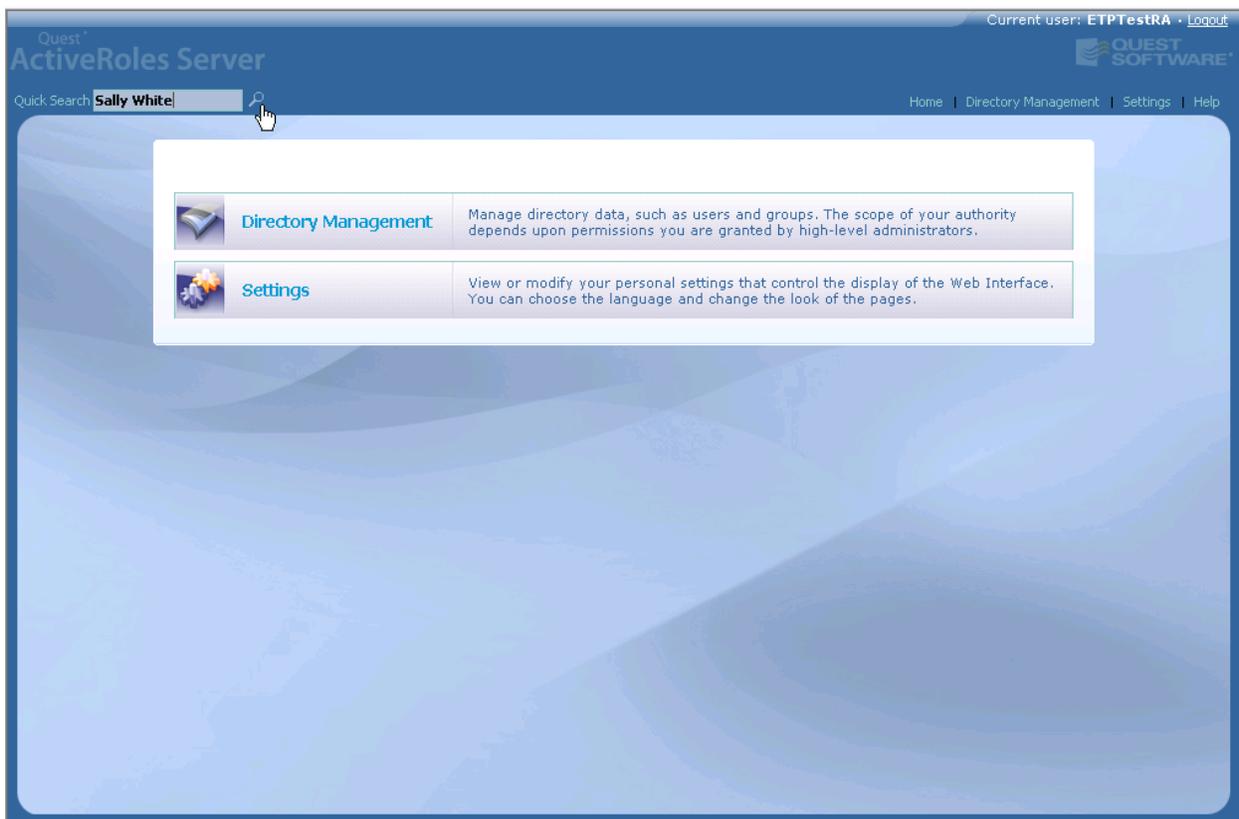
Click **Save** to save the changes.



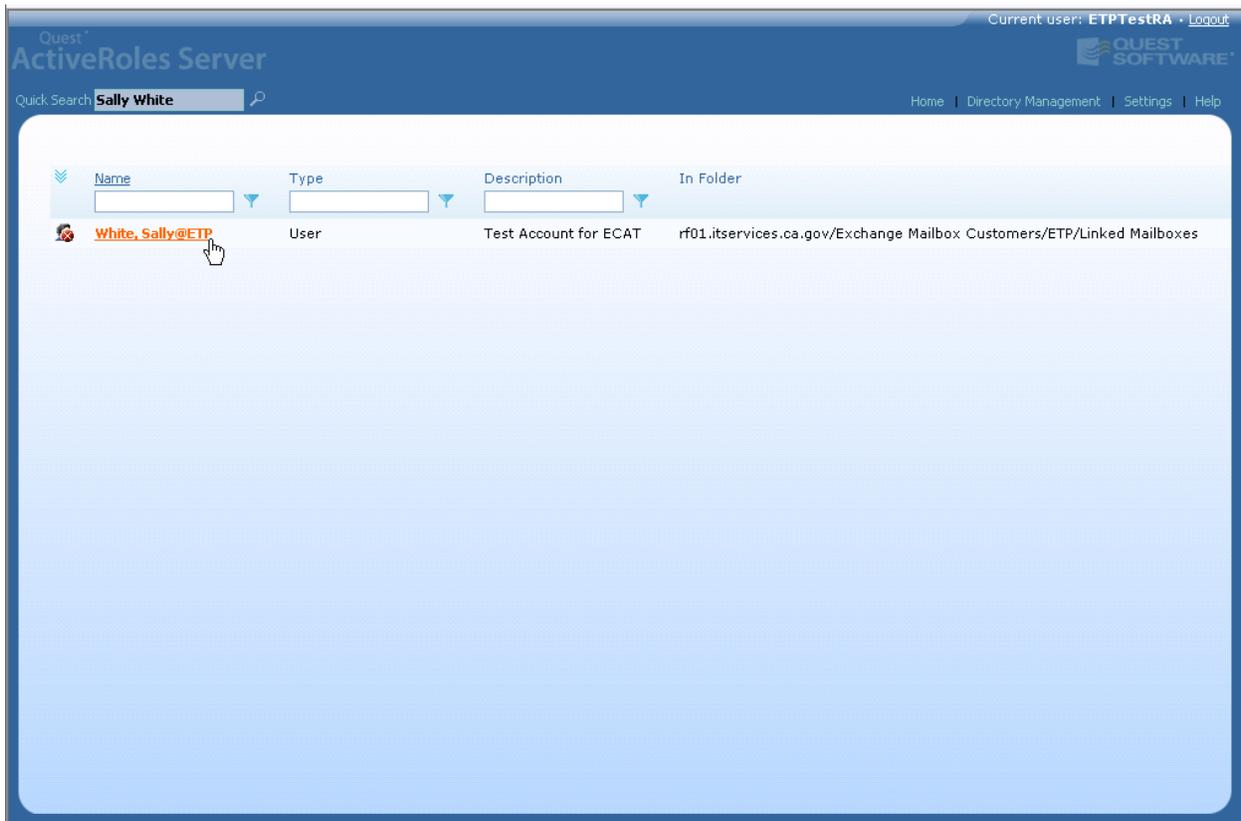
## Deprovisioning a Mailbox Account

Logon to the ECAT web interface with your ECAT administrator account. (e.g., *xAdmFirstInitialLastname*).

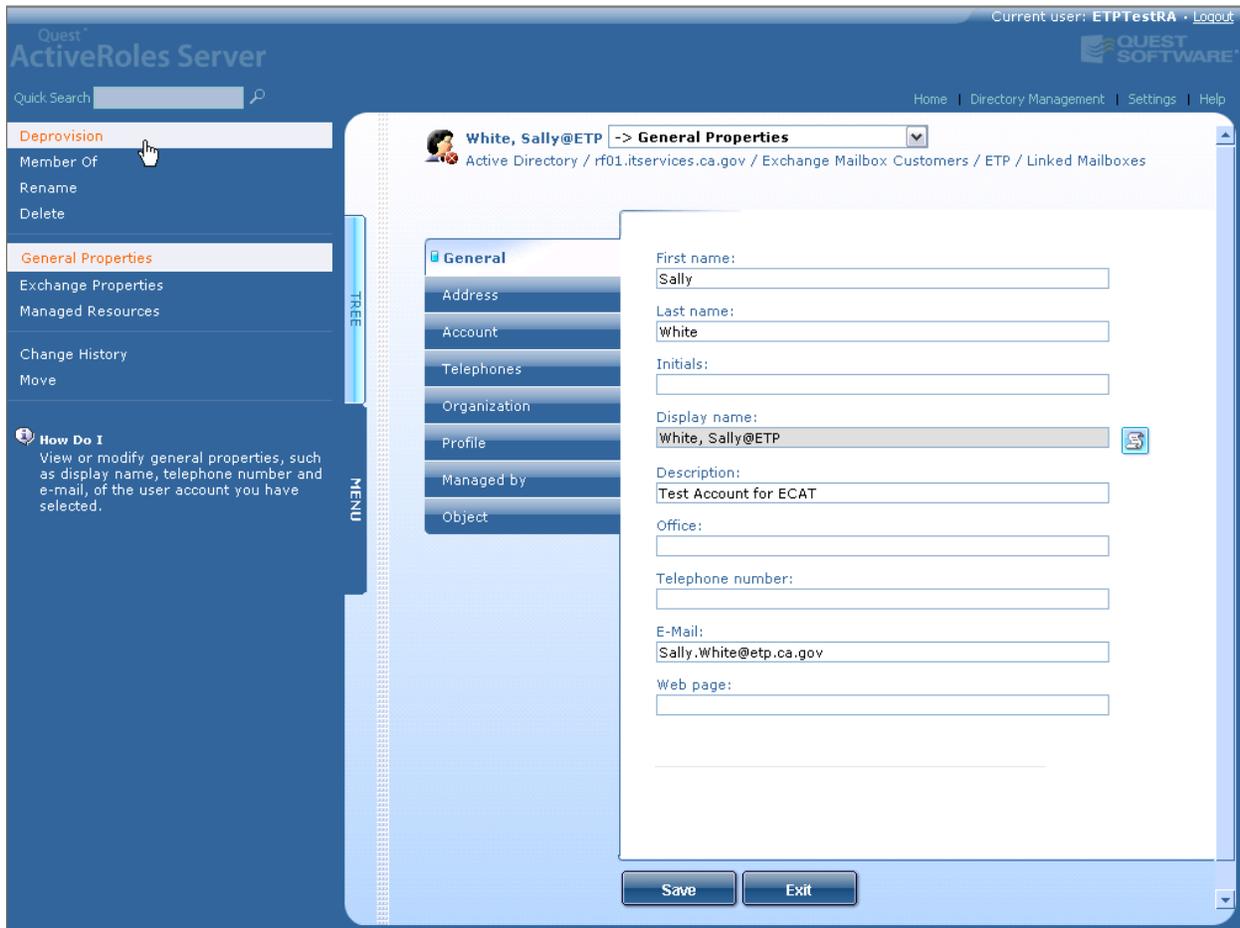
At the **Home** page, in the **Quick Search** box, type in the name of the user whose mailbox is to be deprovisioned and select the search icon .



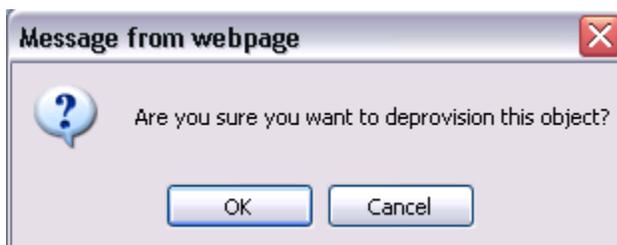
From the search results window, select the mailbox account you were searching for...



With the mailbox account displayed on the screen, click the **Deprovision** command from the command menu on the left.

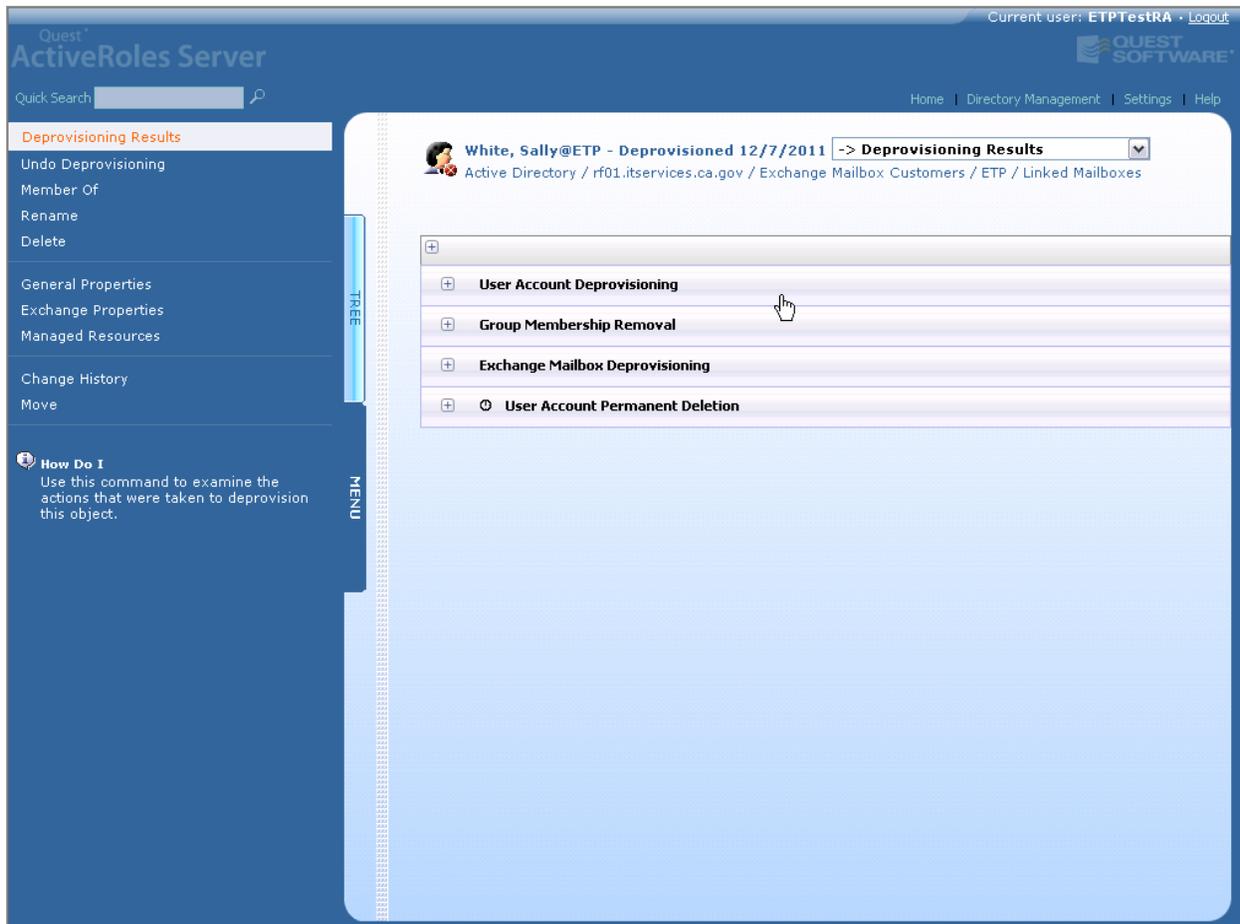


Click OK to the message box below.



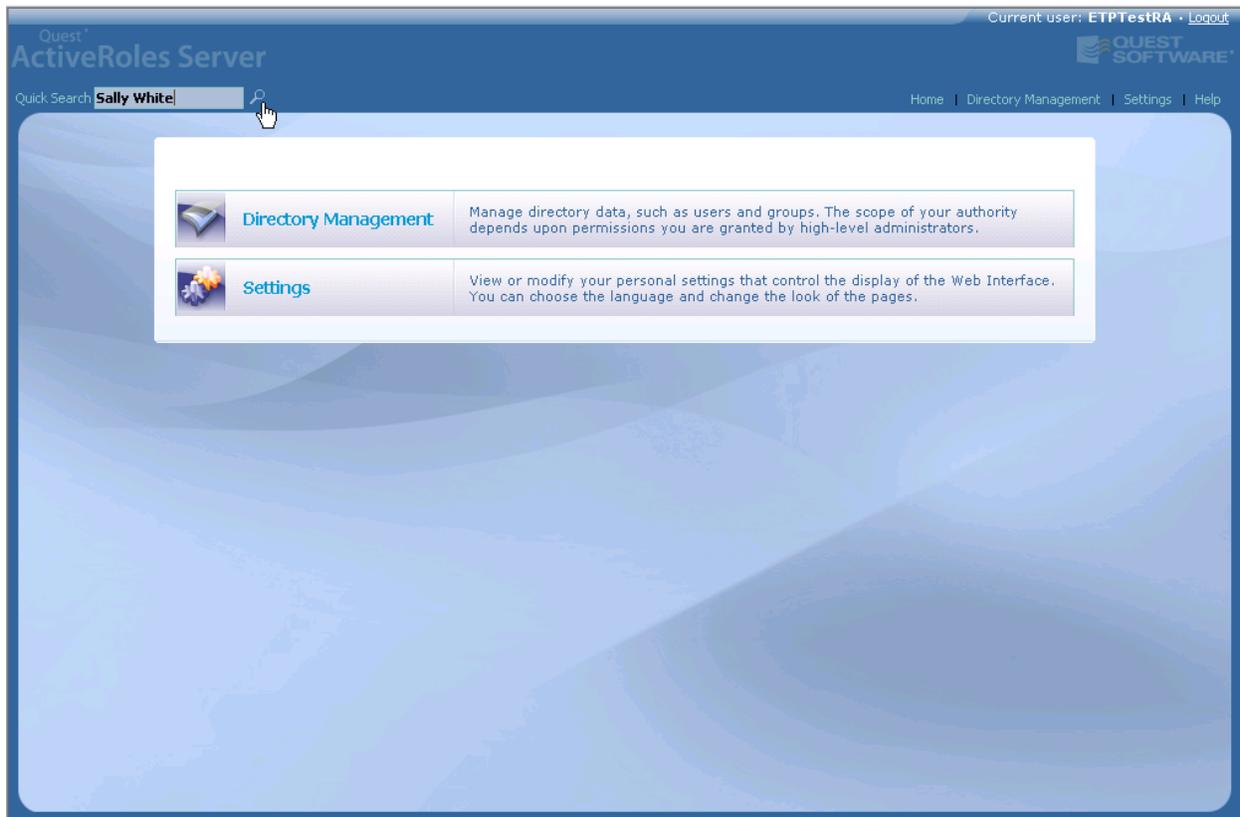
The **Deprovisioning Results** will display, where you can click to expand the plus sign of each to check what actions are taken when a mailbox gets deprovisioned.

- + **User Account Deprovisioning**
- + **Group Membership Removal**
- + **Exchange Mailbox Deprovisioning**
- + **User Account Permanent Deletion**

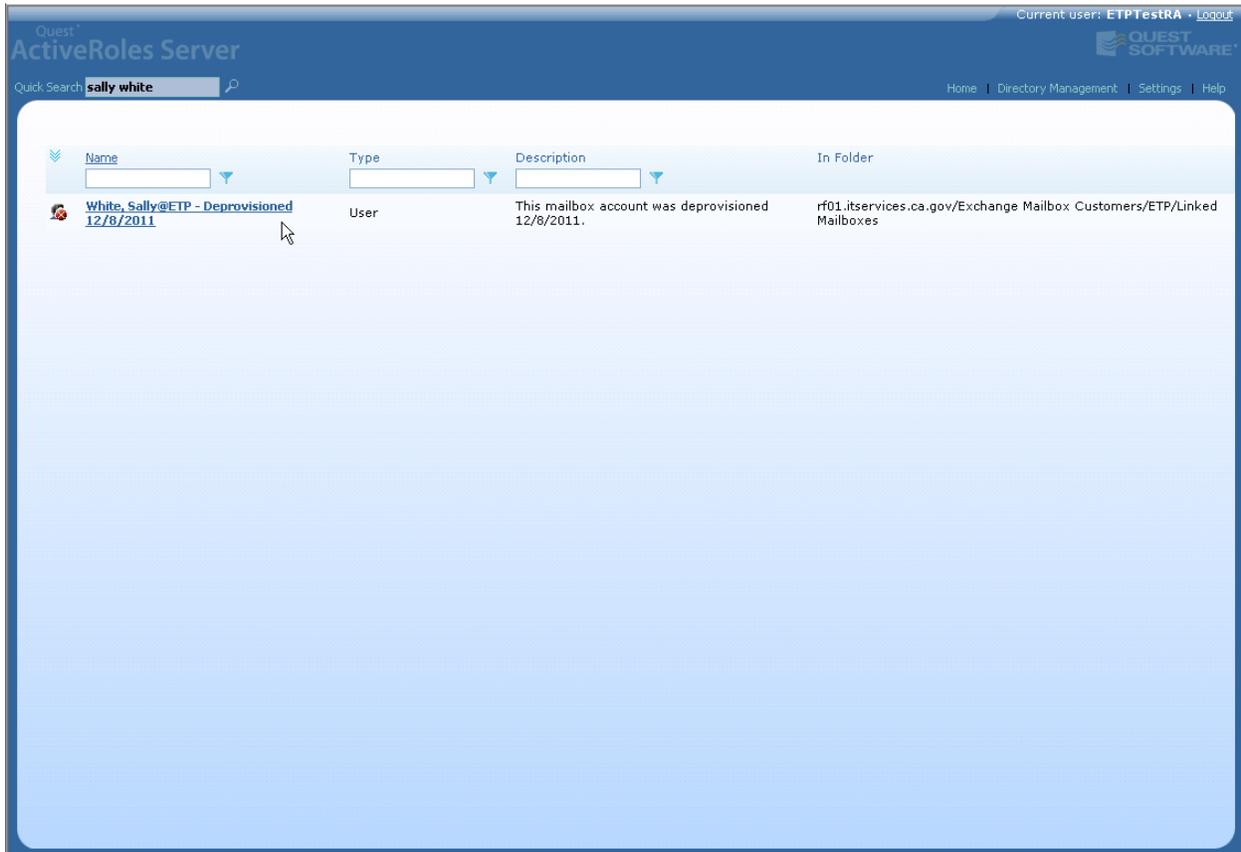


## Undo Deprovisioning of a Mailbox

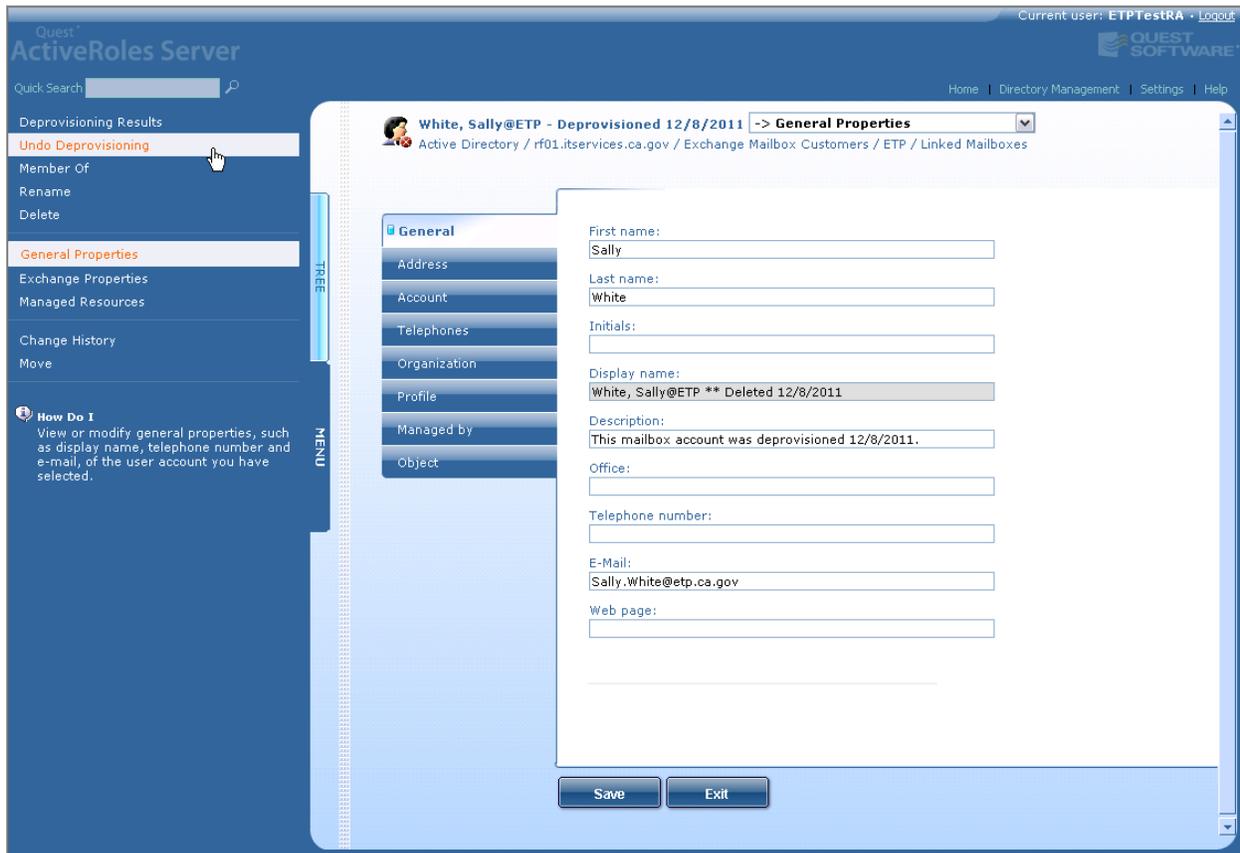
At the **Home** page, in the **Quick Search** box, type in the name of the user whose mailbox needs the undo Deprovisioning process and select the search icon .



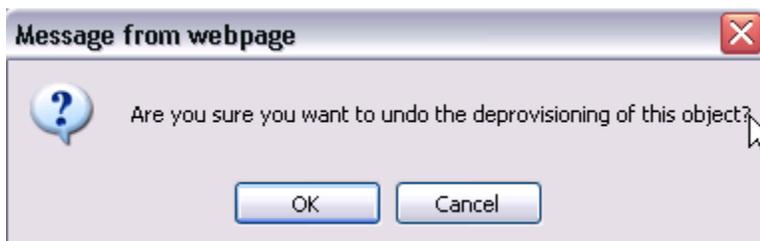
From the search results window, select the deprovisioned mailbox account you were searching for.



With the deprovisioned mailbox account displayed on the screen, click the **Undo Deprovisioning** command from the command menu on the left.



Click **OK** to the message below.



At the **Password Options** window, just select the radio button **Leave the password unchanged**. (Remember, Mailboxes are disabled accounts and don't require a password.)

Then click **OK**.

When a deprovisioned user is restored, the options selected on this page are applied to the password of the restored user.

**Leave the password unchanged**  
The password is to be reset by the Helpdesk or by using any other password management solution.

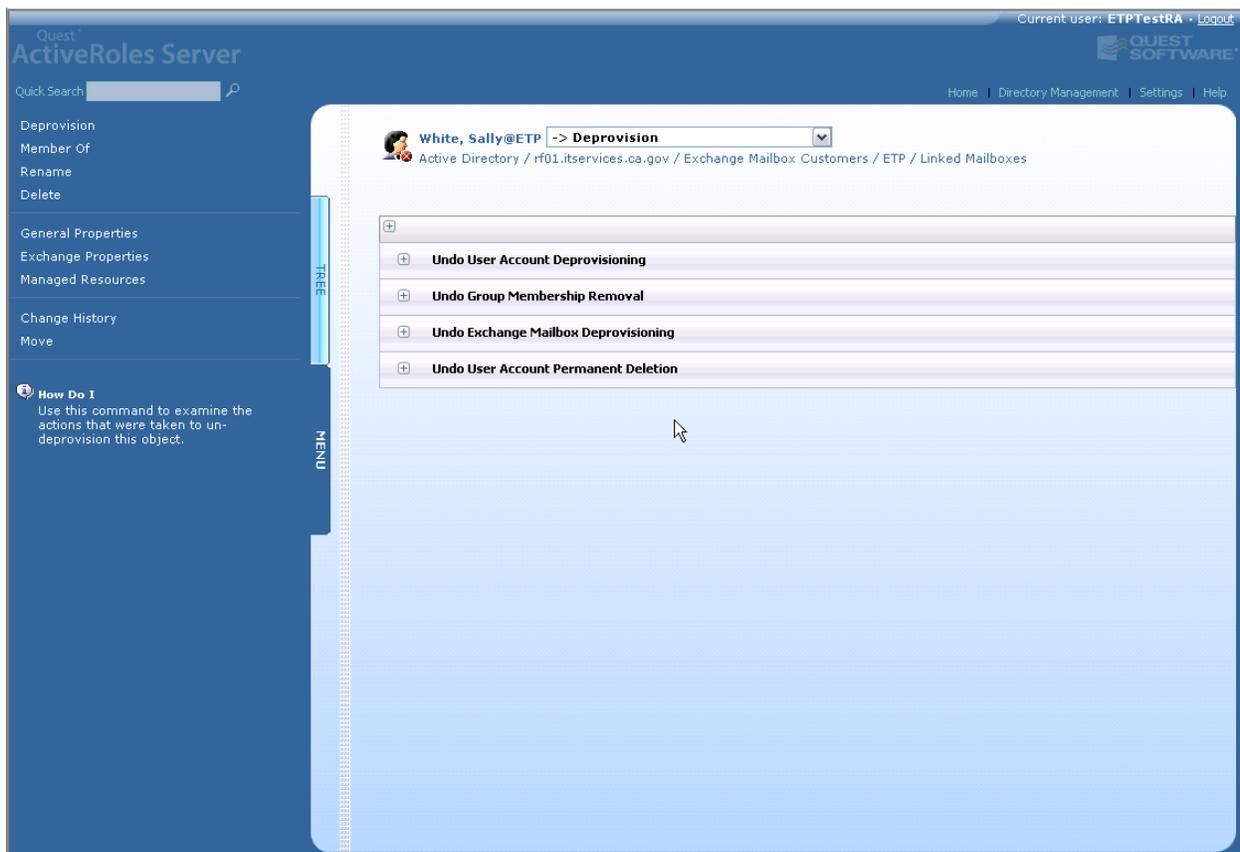
**Reset the password**  
New password:  
Confirm password:  
Generate Clear Spell Out

Account options:  
 User must change password at next logon  
 User cannot change password  
 Password never expires

OK Cancel

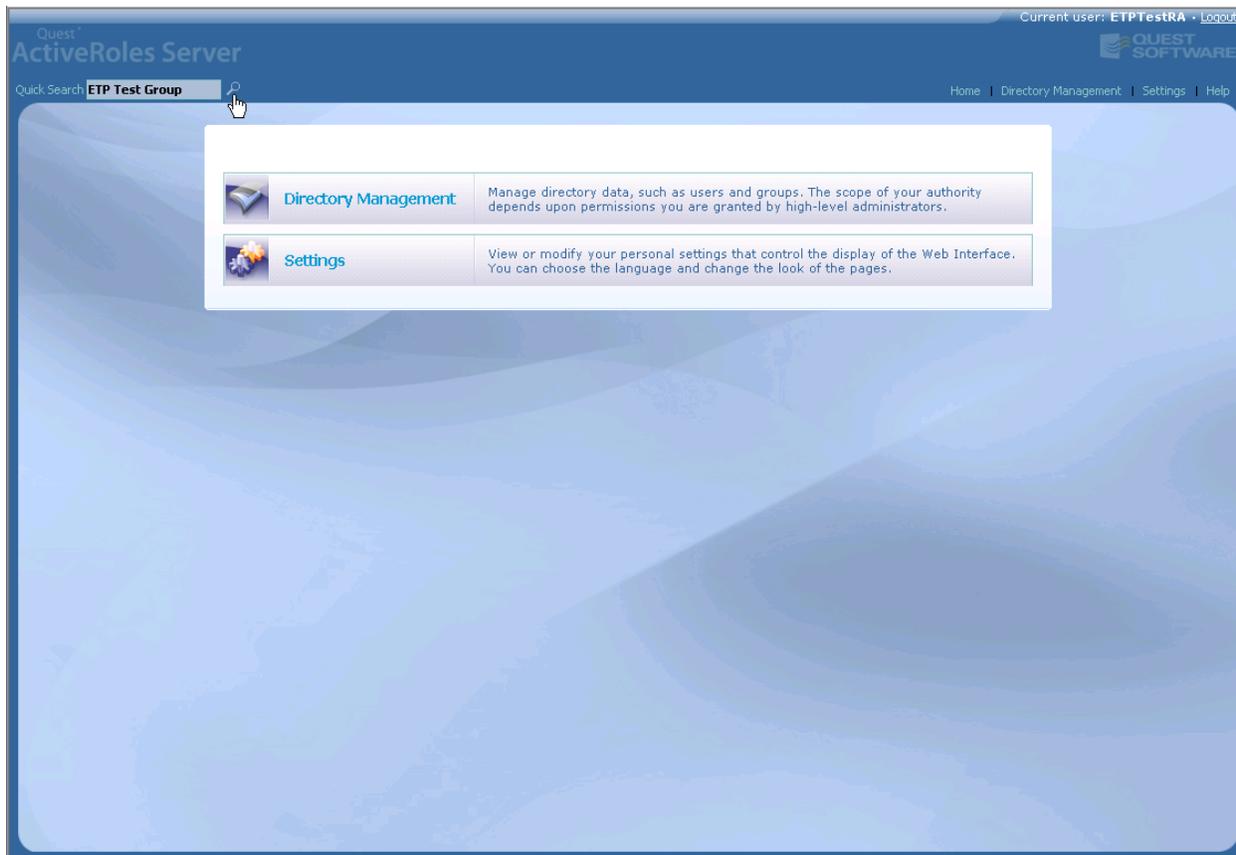
The **Undo Deprovision Results** will display, where you can click to expand the plus sign of each activity to check what actions were taken on the mailbox during the Undo Deprovision process.

- + Undo User Account Deprovisioning
- + Undo Group Membership Removal
- + Undo Exchange Mailbox Deprovisioning
- + Undo User Account Permanent Deletion

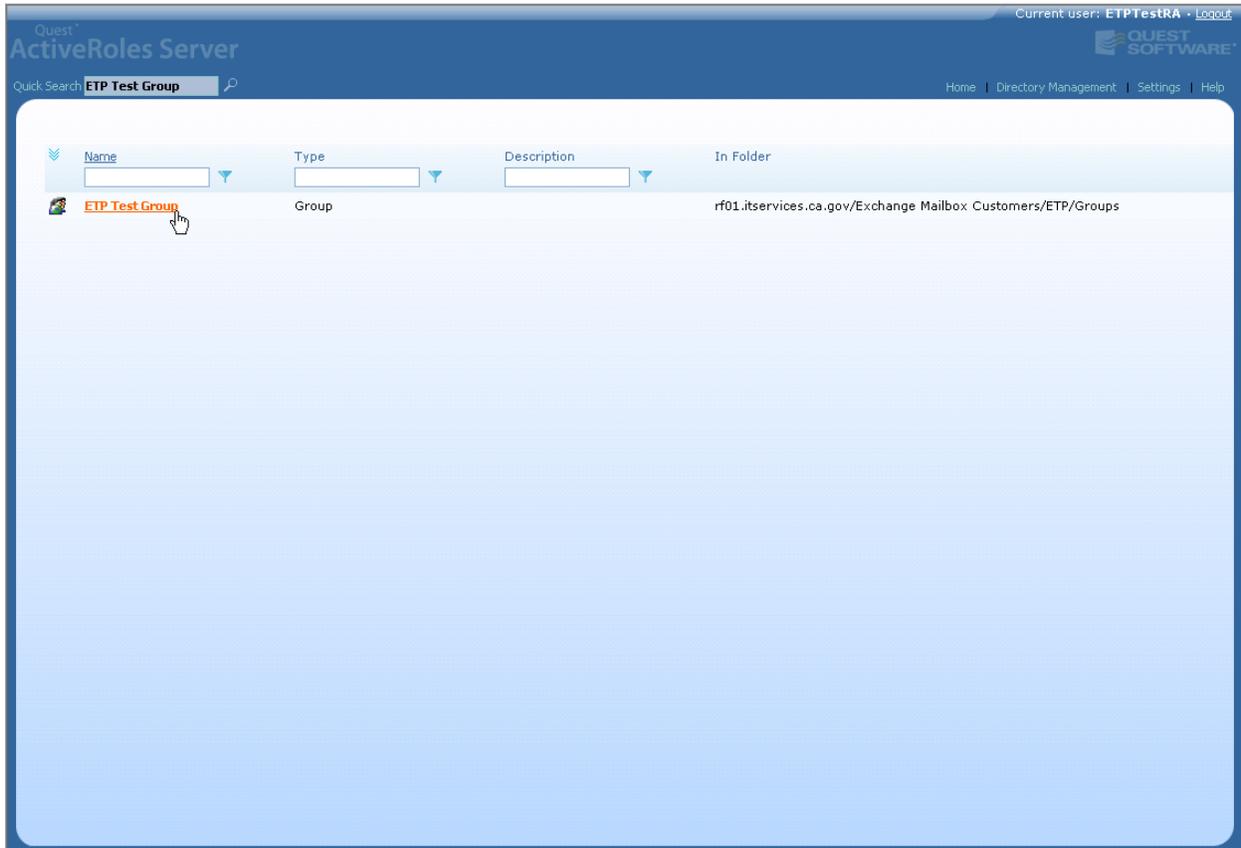


## Deprovisioning a Group (Distribution List)

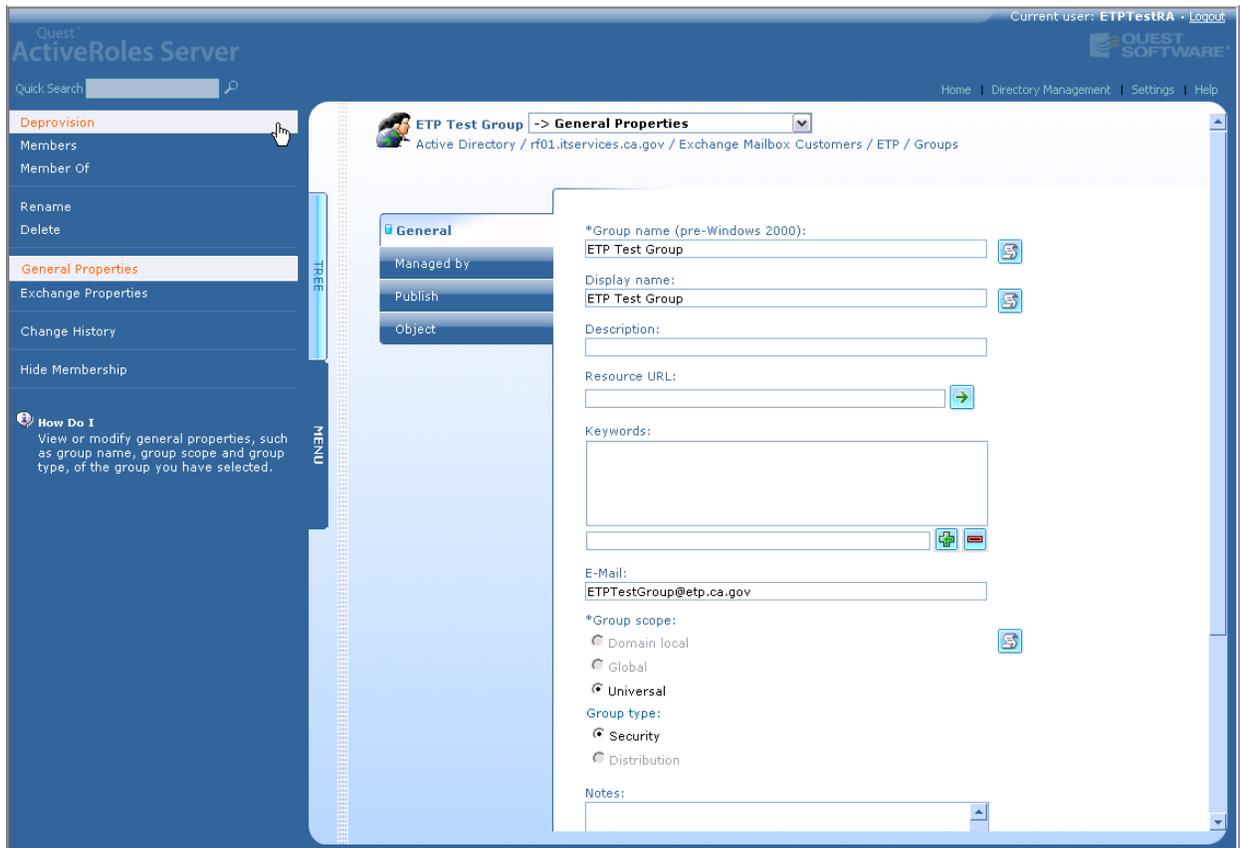
At the **Home** page, in the **Quick Search** box, type in the name of the group (distribution list) which needs Deprovisioning and select the search icon .



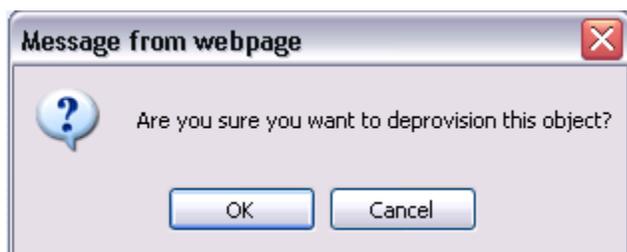
From the search results window, select the group the needs to be deprovisioned.



With the group displayed on the screen, click the **Deprovision** command from the command menu on the left.



Click **OK** to the message displayed below.

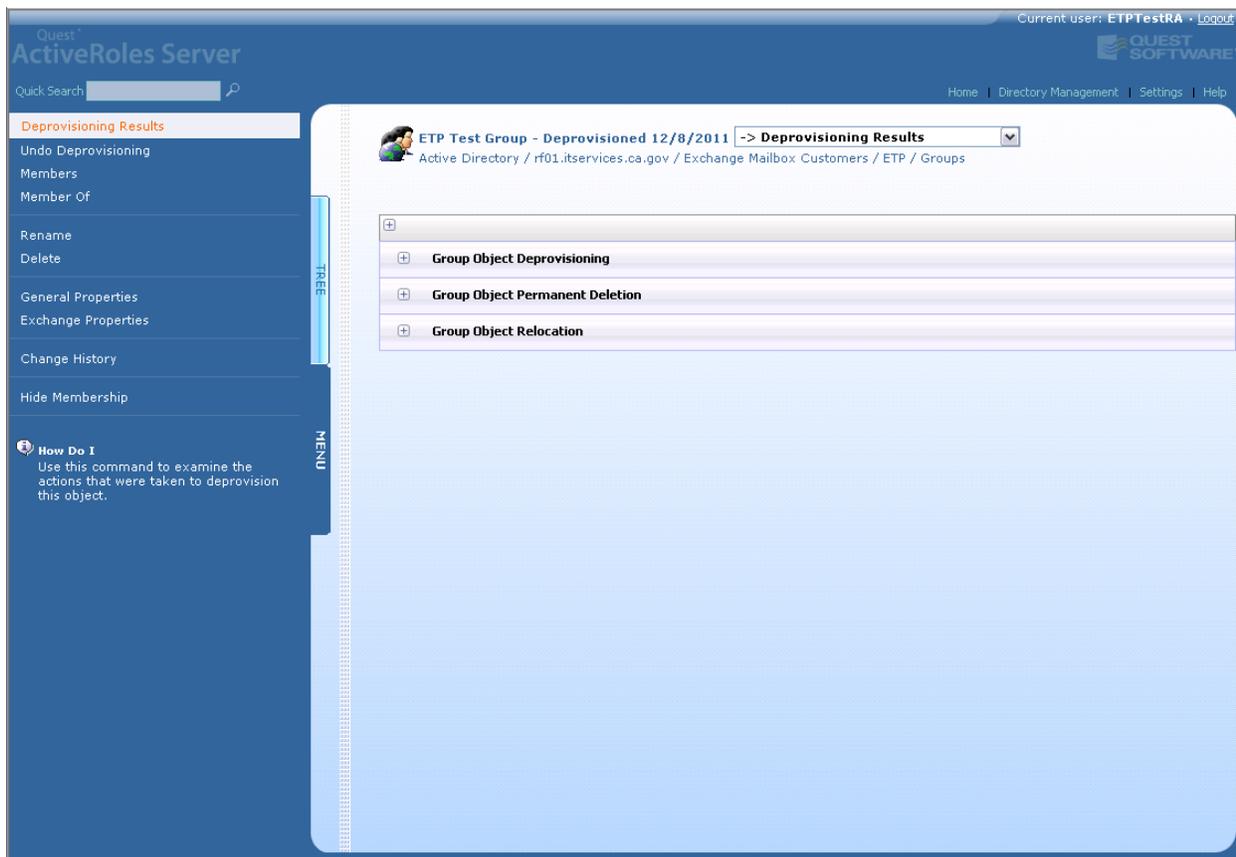


The **Deprovisioning Results** will display, where you can click to expand the plus sign of each activity to check what actions were taken on the group during the Deprovision process.

**+ Group Object Deprovisioning**

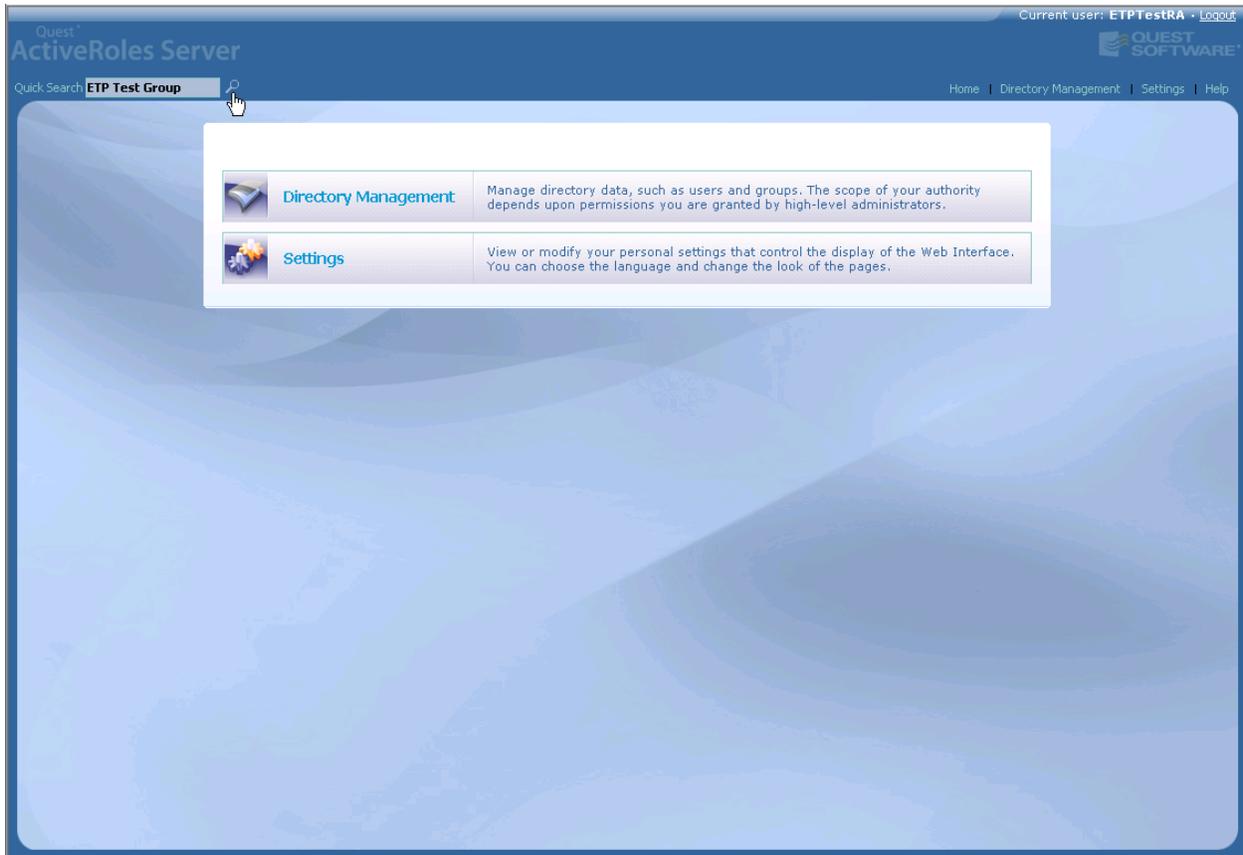
**+ Group Object Permanent Deletion**

**+ Group Object Relocation**

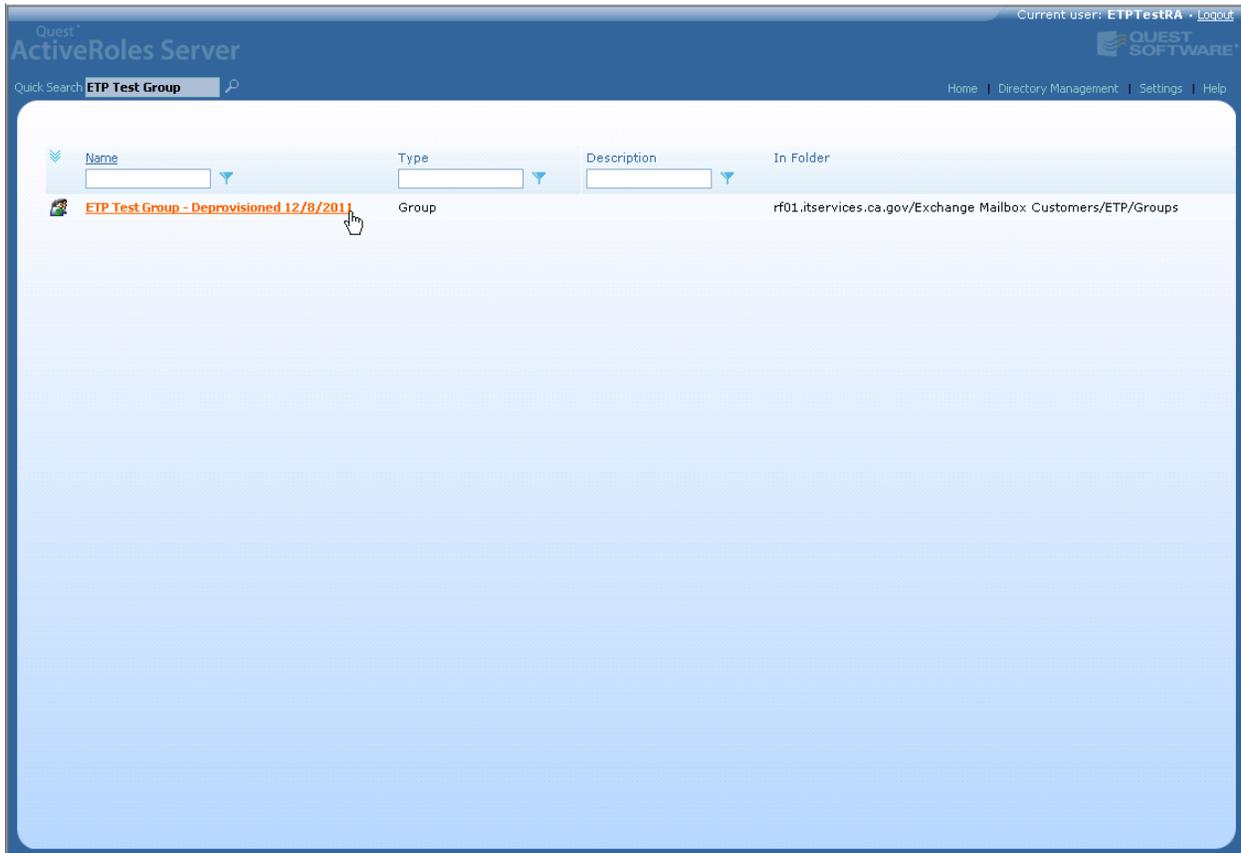


## Undo the Deprovision of a Group (Distribution List)

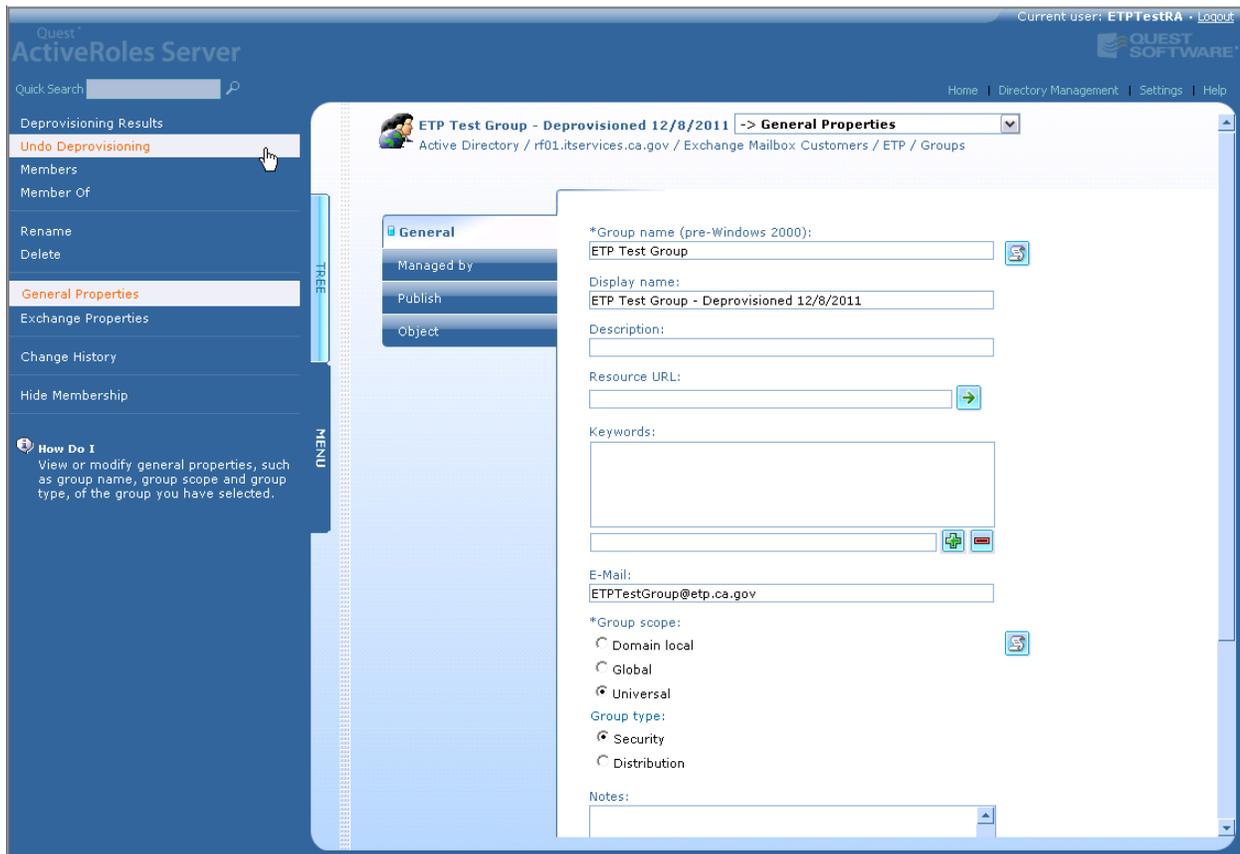
At the **Home** page, in the **Quick Search** box, type in the name of the group (distribution list) which needs the **Undo Deprovisioning** and select the search icon .



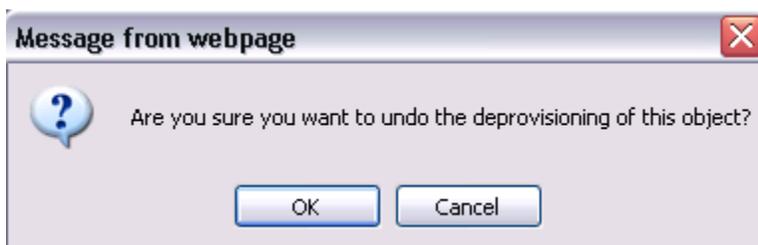
From the search results window, select the deprovisioned group to undo the deprovision.



With the deprovisioned group displayed on the screen, click the **Undo Deprovisioning** command from the command menu on the left.



Click **OK** to the message displayed below.



The **Undo Deprovision Results** will display, where you can click to expand the plus sign of each activity to check what actions were taken on the group during the undo Deprovision process.

**+ Undo Group Object Deprovisioning**

**+ Undo Group Object Relocation**

**+ Undo Group Object Permanent Deletion**

