



Bynari Insight AddressBook 3.0

Administrator's Guide

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Table of Contents

1	Features.....	6
2	Supported Platforms.....	6
3	Prerequisites.....	6
4	Installation and Configuration.....	7
4.1	Installing the Insight AddressBook 3.0.....	7
4.2	Upgrading from previous versions.....	10
4.3	Configuring the Insight AddressBook 3.0.....	10
4.3.1	General Tab.....	11
4.3.2	Display Tab.....	14
4.3.3	Advanced Tab.....	15
4.3.4	Cache Tab.....	18
4.3.5	About Tab.....	18
5	The schemas.xml file.....	18
5.1	Schemas.xml structure.....	18
5.1.1	objectClass.....	19
5.1.2	userFilter.....	19
5.1.3	groupFilter.....	19
5.1.4	searchAttribute.....	19
5.1.5	attributes.....	20
6	Using the Insight AddressBook 3.0.....	20
6.1	Outlook address book icon.....	21
6.2	Using To, CC, BCC.....	23
6.3	Search Feature.....	23
6.4	Outlook Contacts.....	26
7	Registering Insight AddressBook 3.0.....	27
7.1	Manual Registration.....	30
8	Reporting Problems.....	31

Insight AddressBook 3.0

The Insight AddressBook is a fully LDAP 2 and LDAP 3 compliant query tool designed to integrate seamlessly with Microsoft Outlook™ (2000-2007).

The Insight AddressBook is capable of querying any OpenLDAP, Active Directory, or LDAP 2/LDAP3 compliant database.

1 Features

Here are some of the features found in the new Insight AddressBook 3.0:

- XML Schema file for quick global configuration
- Automatic discovery of ObjectClass attributes (when using XML schema)
- Detect Filters
- LDAP attributes are now editable from within the Insight AddressBook configuration dialog window.
- Sort results by: First Name, Last Name, Display Name, or Email Address.
- Auto-detection of LDAP version
- Configurable display columns
- Display “all user” feature
- Full compatibility with Outlook 2007

2 Supported Platforms

The Insight AddressBook 3.0 is compatible with all current Microsoft Outlook™ versions from Outlook 2000 – 2007. The Insight AddressBook 3.0 is also fully compatible with all current Microsoft operating systems:

- Windows 2000 Pro
- Windows XP Pro

Note: Installation of the Insight AddressBook requires administrator rights to the local desktop.

3 Prerequisites

Because Insight AddressBook 3.0 is not resource intensive, the minimum system requirements needed to run your Windows' operating system are more than sufficient. It is highly recommended that all Microsoft updates and Office patches and Service Packs be installed prior to installing the Insight AddressBook 3.0.

Needed Information:

- LDAP Server Fully Qualified Domain Name (FQDN) or IP Address
- LDAP Port number (389 is the default)
- User Distinguished Name (DN)
- User Password
- Container Distinguished Names

For the configuration of the schemas.xml file, the administrator will need to know the general architecture of your LDAP server. For administrators that are unfamiliar with their LDAP architecture, there are tools available that can simplify this task:

- Softerra LDAP Browser - <http://www.ldapbrowser.com/download.htm>

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- JXplorer LDAP Browser - <http://www.jxplorer.org/>
- Slapcat – Command line tool that comes with OpenLDAP

4 Installation and Configuration

4.1 *Installing the Insight AddressBook 3.0*

The following steps will install the Insight AddressBook 3.0.

1. Unzip the compressed file.
2. Double-click the executable that you just unzipped.
3. Select “Next” on the welcome dialog window

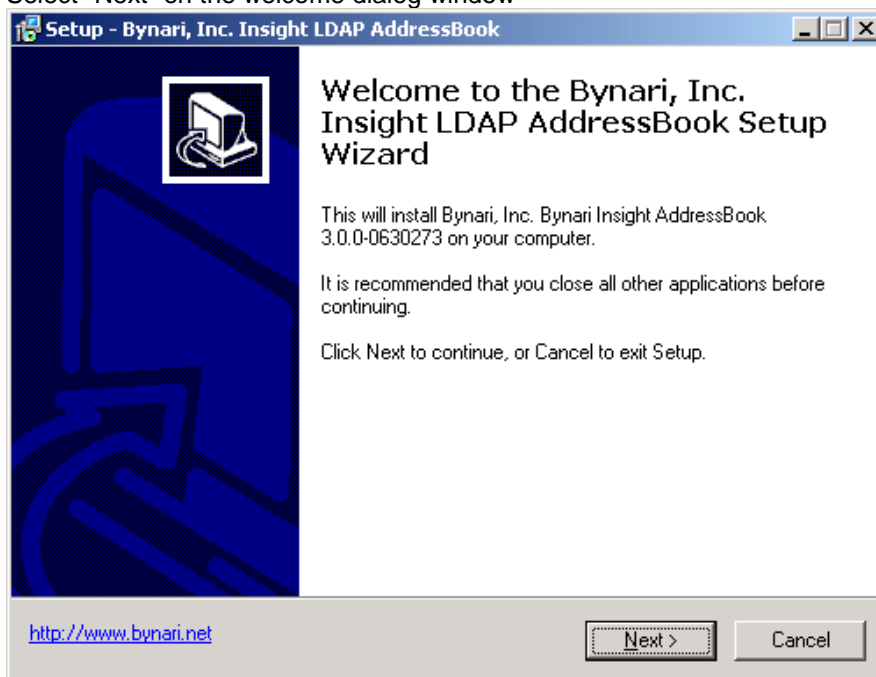


Figure 1 – Insight AddressBook 3.0 – Installation

4. Accept the End User License Agreement by selecting "I accept the agreement"

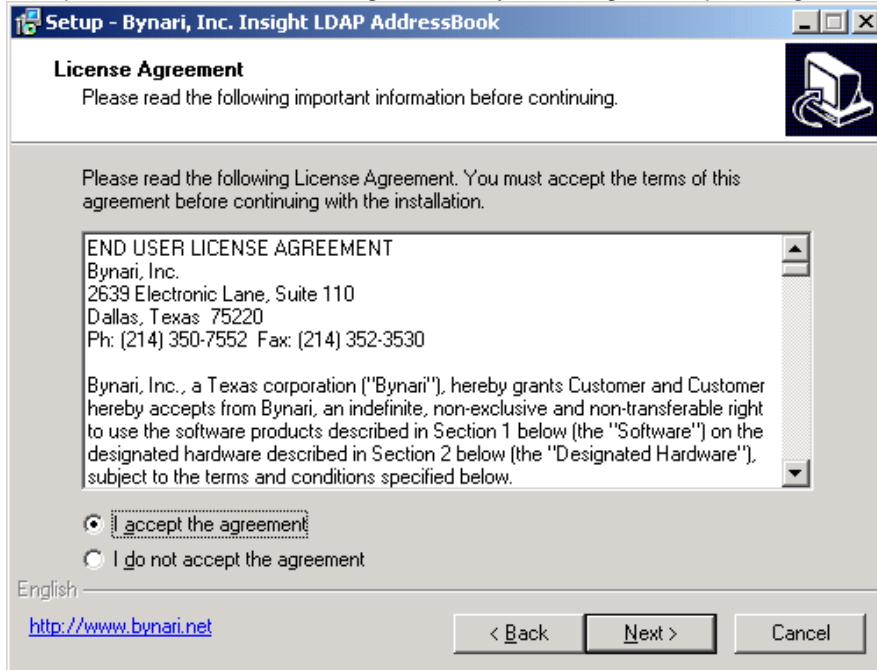


Figure 2 – Insight AddressBook 3.0 - EULA

5. Accept the default installation location or specify another location and select "Next".

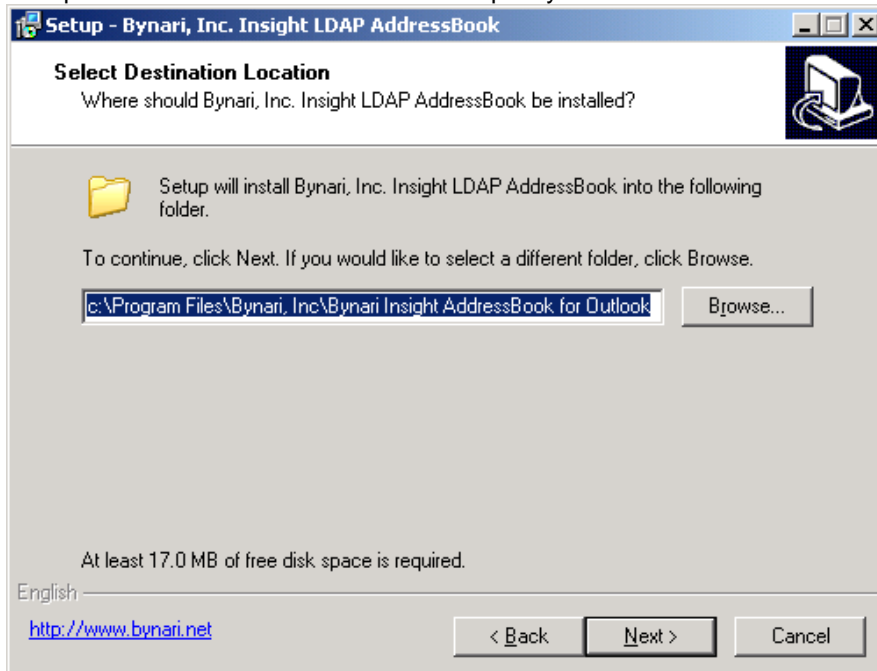


Figure 3 – Insight AddressBook 3.0 – Installation Location

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6. Select the "Install" button. The necessary files will now be installed on your pc.

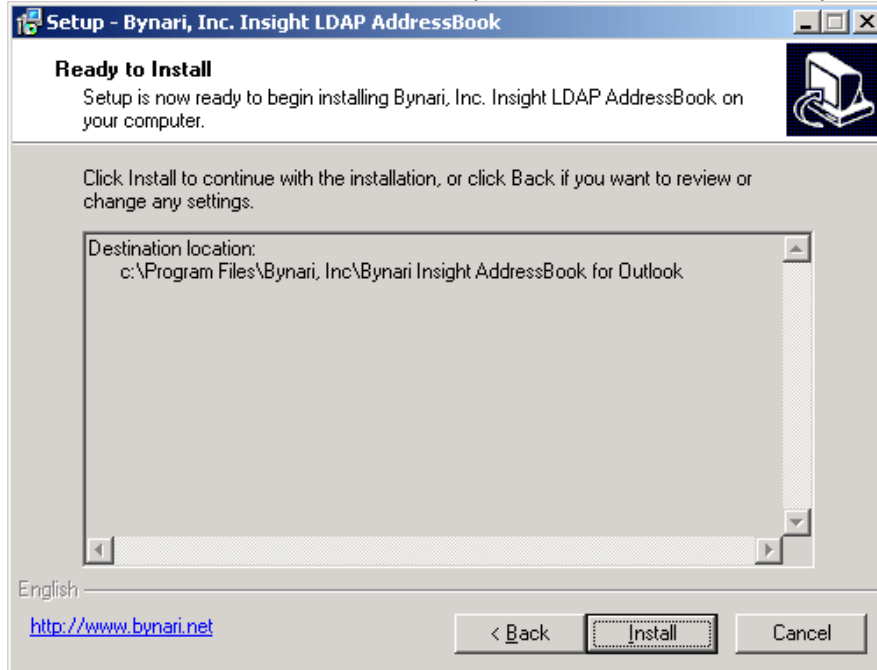


Figure 4 – Insight AddressBook 3.0 – Install

7. Select "Run Outlook" to start Outlook.

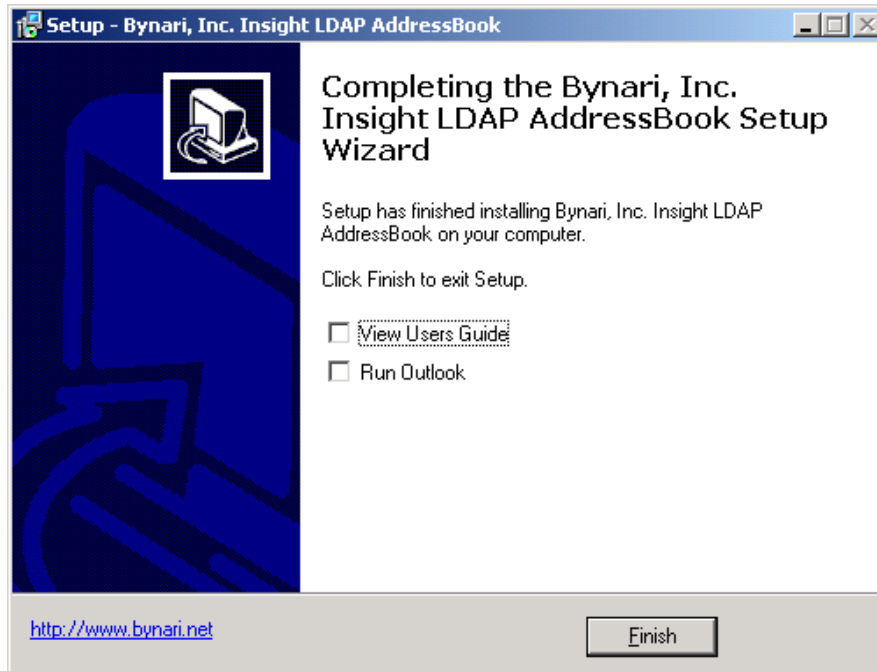


Figure 5 – Insight AddressBook 3.0 – Installation Complete

8. The Insight AddressBook 3.0 registration page will display immediately after the "Finish" button is selected. For 30 day evaluation mode, fill in the information on the form and

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select "30 Days Evaluation". For users with a license, select "Skip".

4.2 Upgrading from previous versions

Upgrading from the Insight AddressBook 2.0 is easy. The Insight AddressBook 3.0 installation process automatically looks for previous versions of Insight AddressBook. If a prior version is found the settings are retrieved from it and copied over to the new version. There is no need to reconfigure the newly installed Insight AddressBook 3.0. When Outlook is restarted the new software will already be configured and ready for use.

NOTE: Insight AddressBook 3.0 uses a completely different license code than Insight AddressBook 2.0. You can get a new license, prior to installation, by contacting Bynari.

4.3 Configuring the Insight AddressBook 3.0

The following steps will help you to configure the Insight AddressBook 3.0 with your LDAP server.

1. Open Outlook.
 - a. **Outlook 2000:**
 - i. Select Tools > Services > Add > Bynari Insight AddressBook 3.0
 - b. **Outlook 2002-2003**
 - i. Select Tools > Email Accounts > Directory > Add a new directory or address book > Additional Address Books > Bynari Insight AddressBook 3.0
 - c. **Outlook 2007**
 - i. Select Tools > Account Settings > Address Books > New > Additional Address Books > Bynari Insight AddressBook 3.0
2. The Bynari Insight AddressBook 3.0 configuration window is now displayed.

NOTE: the information entered in the figure below would not normally be displayed during this step of the installation process. It is displayed here as an example.

4.3.1 General Tab

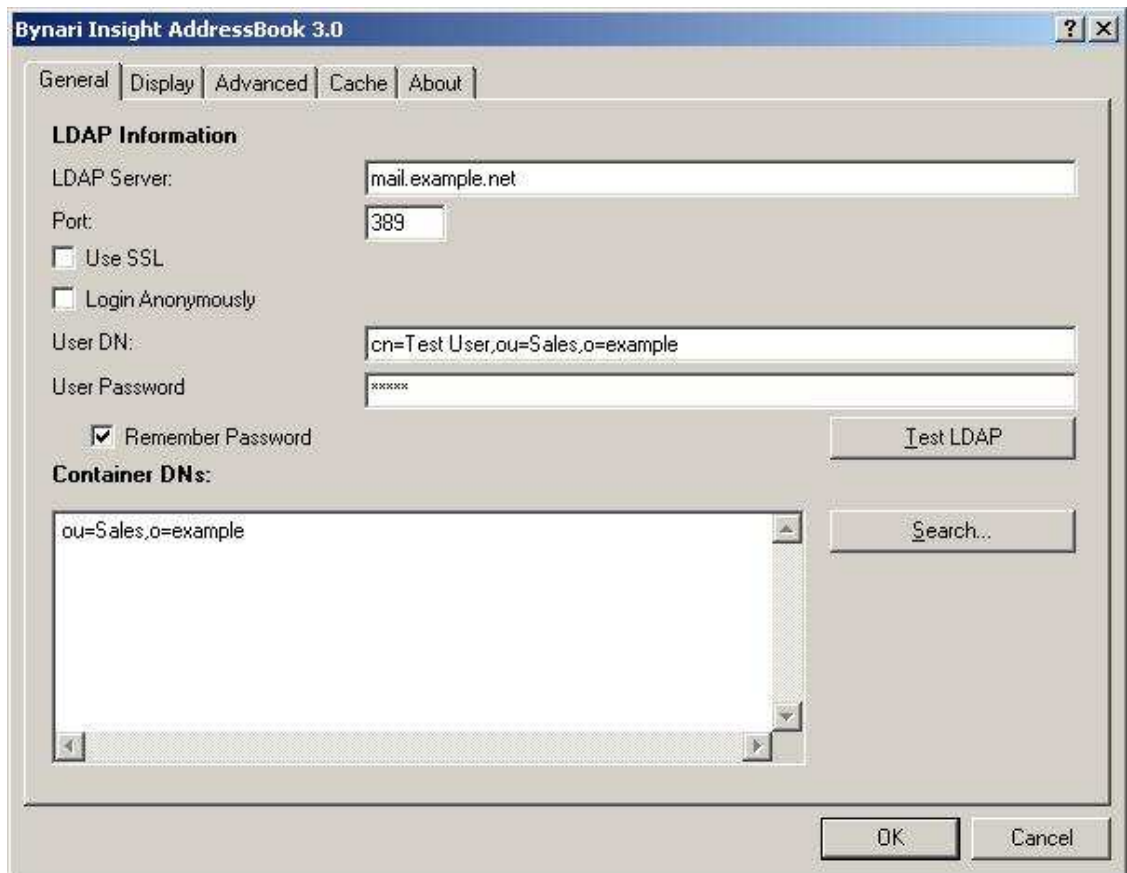


Figure 6 – Insight AddressBook 3.0 – LDAP Configuration

1. **LDAP Server:**
Enter the Fully Qualified Domain Name (FQDN) or IP Address for the LDAP server.
2. **Port:** 389 by default
3. **Use SSL:**
If your LDAP server uses SSL, place a check in this box.
4. **Login Anonymously:**
If your LDAP server supports anonymous login, place a check in this box.
5. **User DN:**
The User DN (Distinguished Name) is comprised of a unique identifier for the user and the domain container. In the figure above, the unique identifier is the entry “cn=” in the LDAP database followed by the domain or organizational information. Some LDAP databases are configured with domain components (dc) while others are configured to utilize organizational units (ou).
6. **User Password:** Enter the user’s password
7. Select the checkbox next to “Remember Password”.

Bynari Insight AddressBook 3.0

8. Select the "Test LDAP" button. If your configuration parameters in steps 5-10 are correct, the "Successfully Connected" dialog window will be displayed:

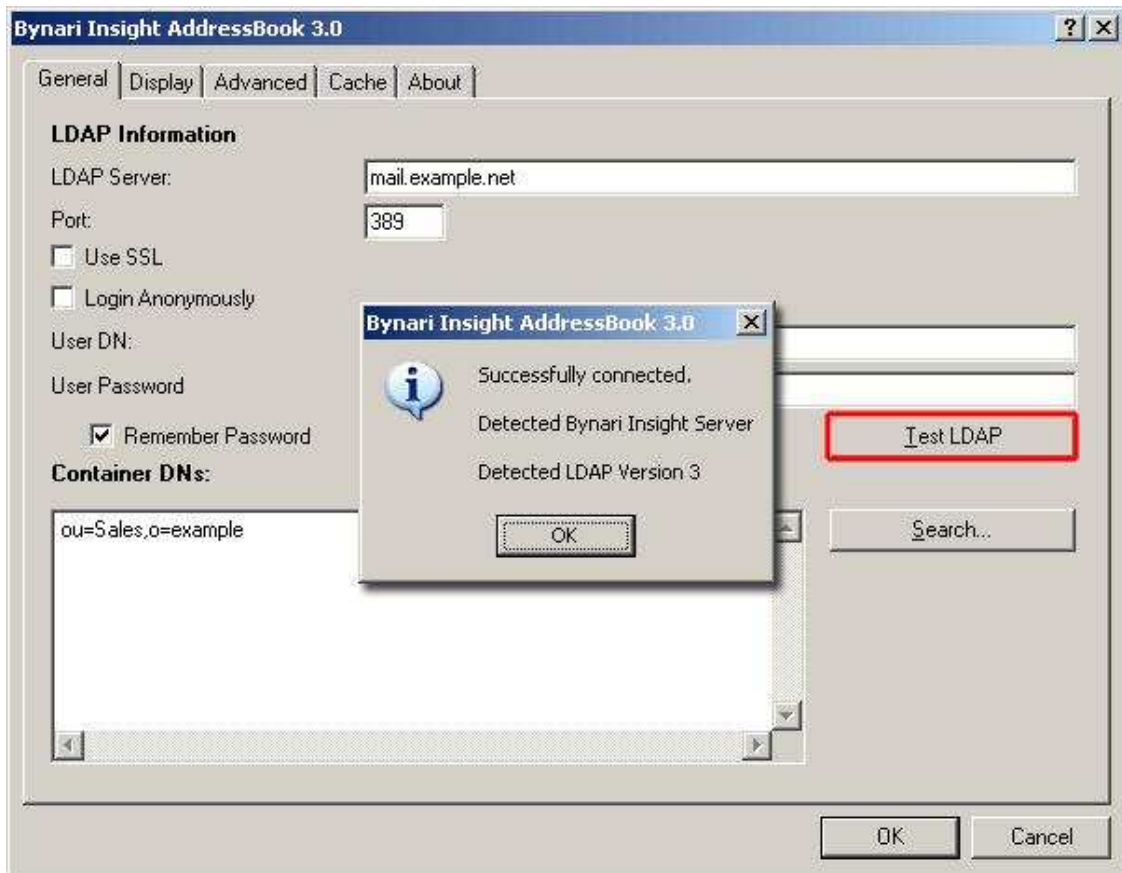


Figure 7 – Insight AddressBook 3.0 Test LDAP

9. Select "OK" to close the "Successfully Connected" dialog window.
10. Select the "Search" button to open the Container DN search dialog window.

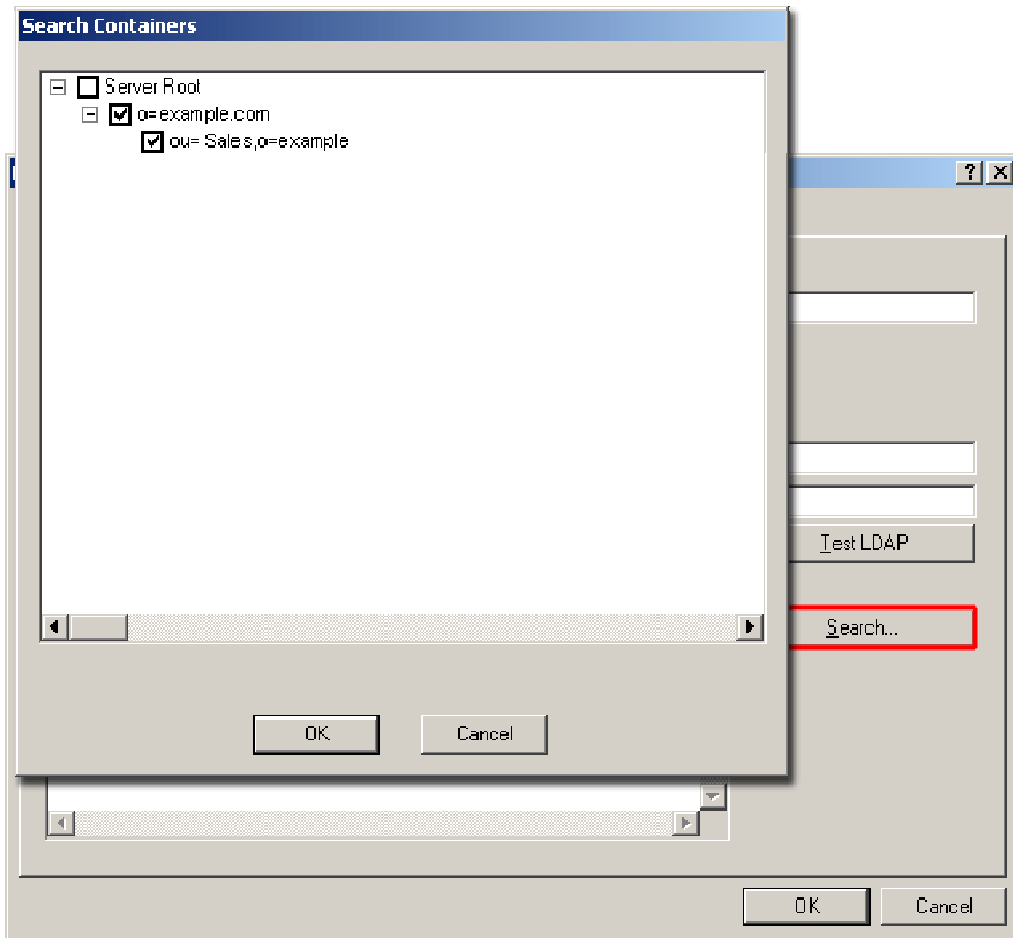


Figure 8 – Insight AddressBook 3.0 Search Container

11. Select the domain component (dc) or organizational unit as needed. Some LDAP structures use domain components while others utilize organizational units (ou). Data entered here will depend on your organization's LDAP structure.
12. Select "OK" when all required components have been selected.
13. The "Container DN's:" window will display the domain component (dc) or organizational units (ou).

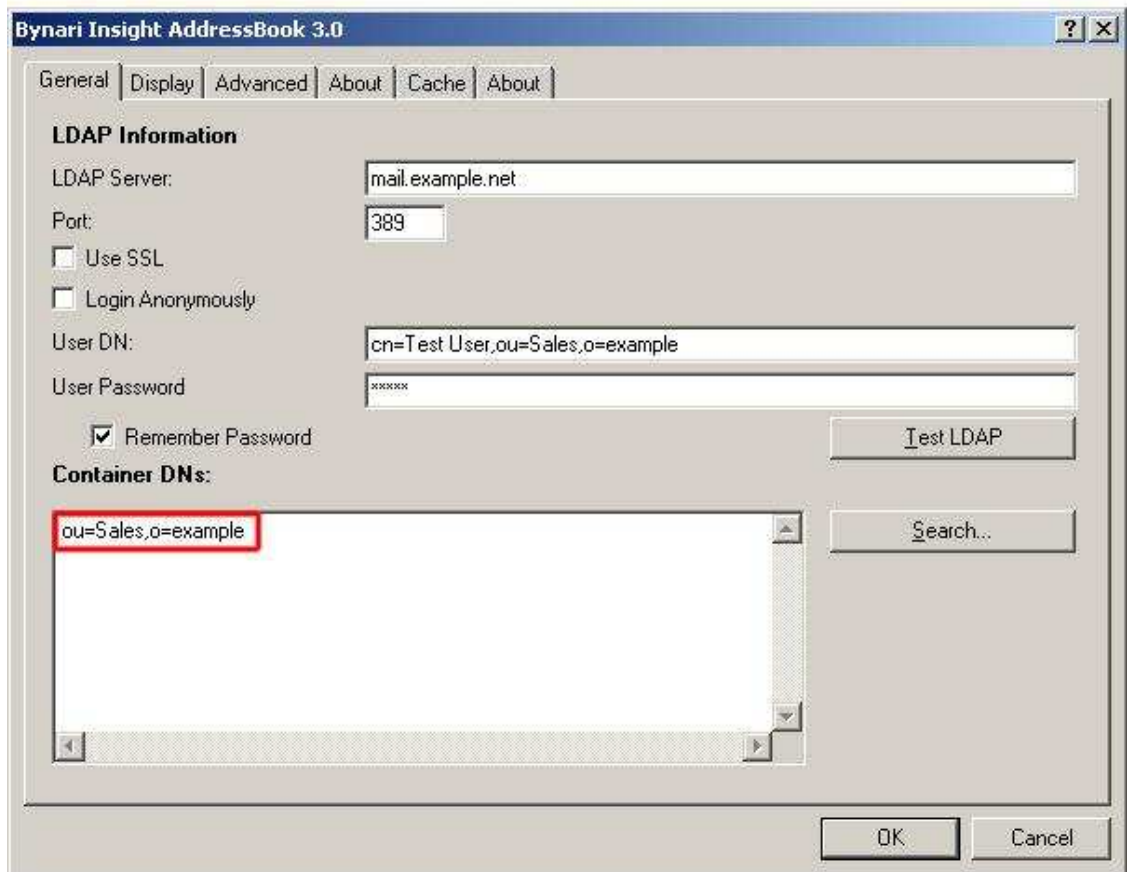


Figure 9 – Insight AddressBook 3.0 Container DNs

4.3.2 Display Tab

On the “Display” tab, you can configure the actual Display Name of the address book. You can also modify the display columns as shown in the AddressBook by selecting “Configure Display Columns”.

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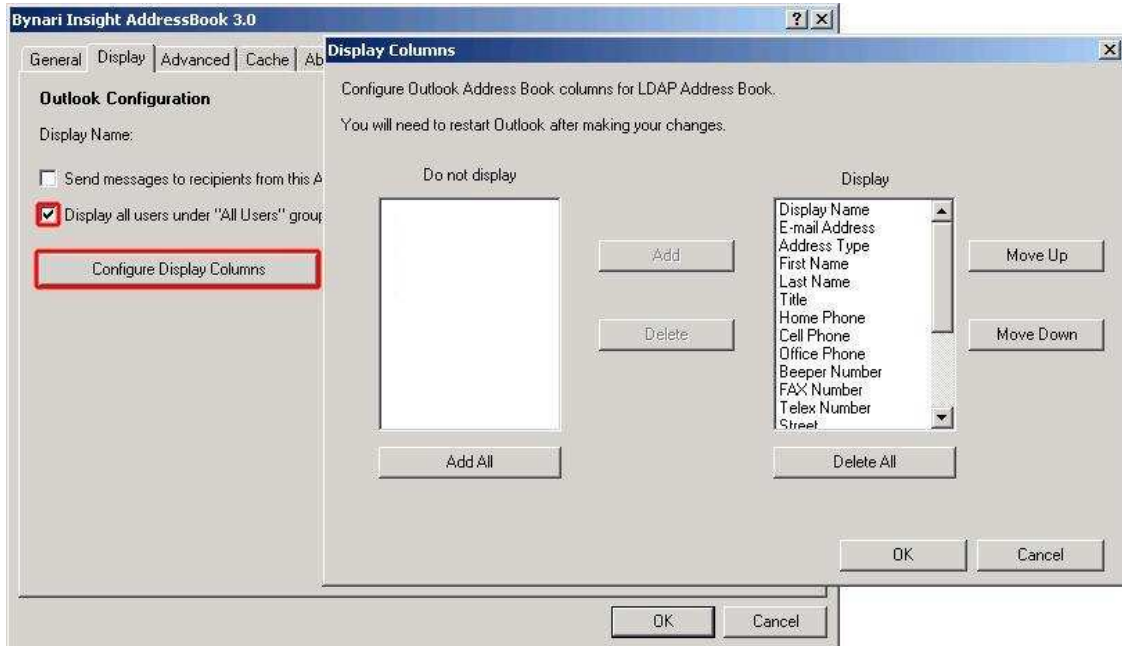


Figure 10 – Insight AddressBook 3.0 Configure Display Columns

1. By default, all items are displayed in the address book view. To modify what content is displayed, select the items you want to remove and then press the “Delete” button in the center of this dialog window. You can also change the order of the displayed items by highlighting the item and using the “Move Up” or “Move Down” buttons.
2. When finished modifying the column display, select “OK”.
3. Display all users under “All Users” group container.
By selecting this option, all users will be displayed within the AddressBook display pane. All groups, mailing lists, etc will be displayed when this option is selected.

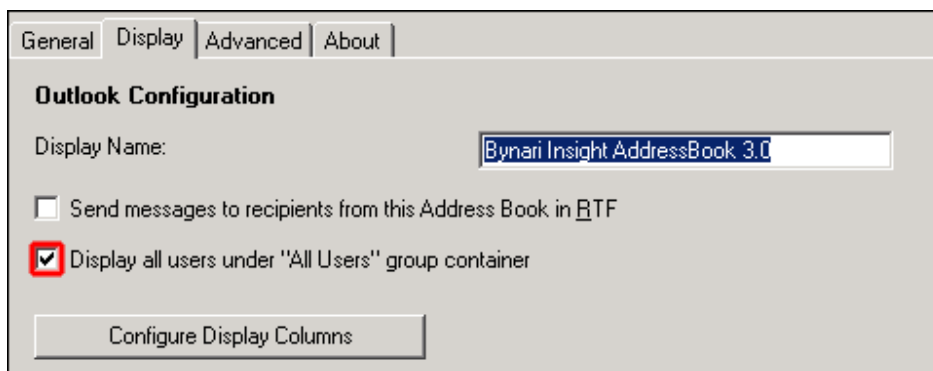


Figure 11 – Insight AddressBook 3.0 Display All Users

4.3.3 Advanced Tab

The Advanced tab contains all of the options for LDAP searches. By default, the AddressBook 3.0 will recognize both the Insight Server 4.3 and neonInsight 5.0 LDAP schemas. It will also “auto-populate” the LDAP search filters with the correct objectClass information.

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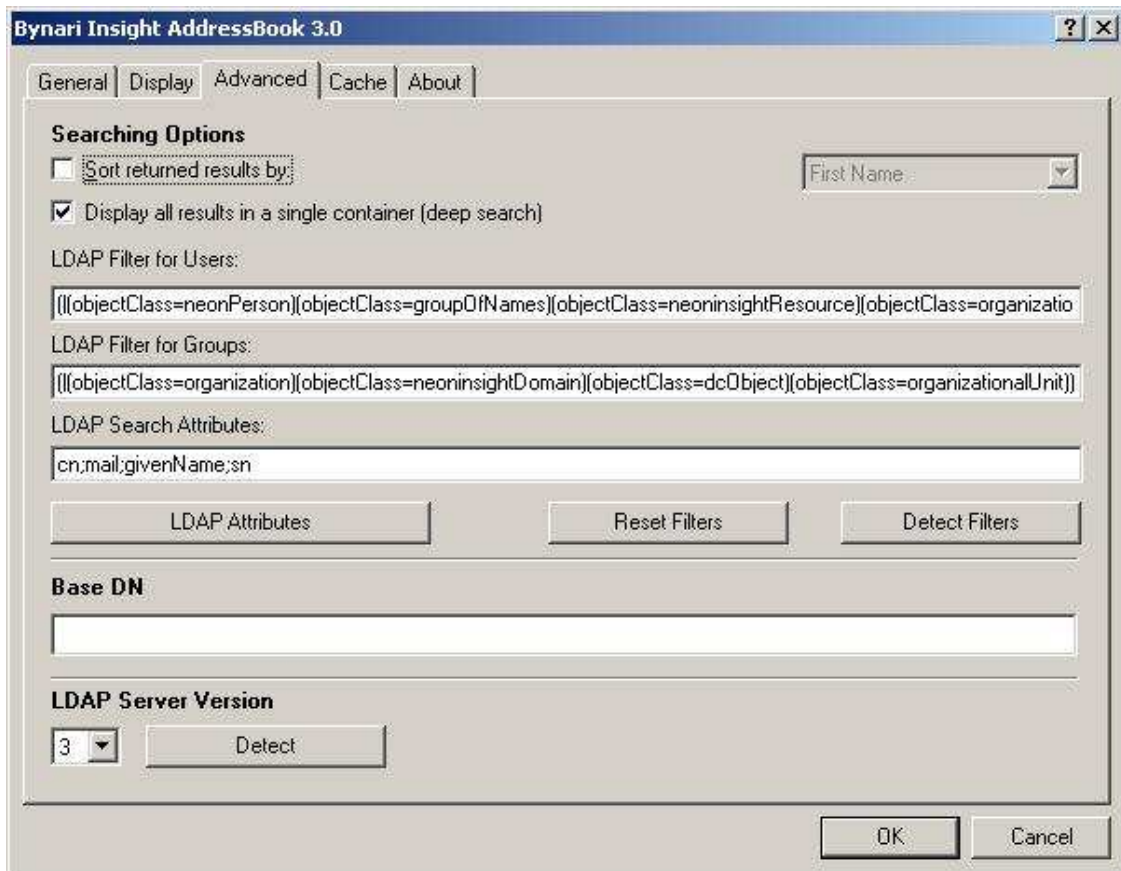


Figure 12 – Insight AddressBook 3.0 Advanced Filters

1. By placing a check in the “Sort returned results by:” box, the pull down menu on the right side of this window becomes active. When active, you can select how you want the results to be displayed.
Options are:
 - a. First Name
 - b. Last Name
 - c. Display Name
 - d. Email Address
2. Display all results in a single container (deep search).
This option will automatically turn on the deep search feature used with the Insight AddressBook 3.0 search tool. For more information on the search tool see section 6.3 Search Feature.
3. The LDAP Filters for Users, LDAP Filter for Groups, and LDAP Search Attributes can all be configured independently on this screen. These attributes can also be configured through the schemas.xml file that accompanies the installation of the Insight AddressBook 3.0. This default location for the schemas.xml file is:
C:\Program Files\Bynari, Inc\Bynari Insight AddressBook For Outlook
4. Editing the schemas.xml file requires an understanding of your LDAP structure. Utilizing tools such as LDAP browsers can be helpful during this part of the process. Once you have your objectClass parameters and LDAP Search Attributes configured in the schemas.xml file, the file can be utilized for all subsequent installations by copying it to

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the directory noted in step 2. More information about the schemas.xml structure can be found in section 5 of this manual.

5. LDAP Attributes:

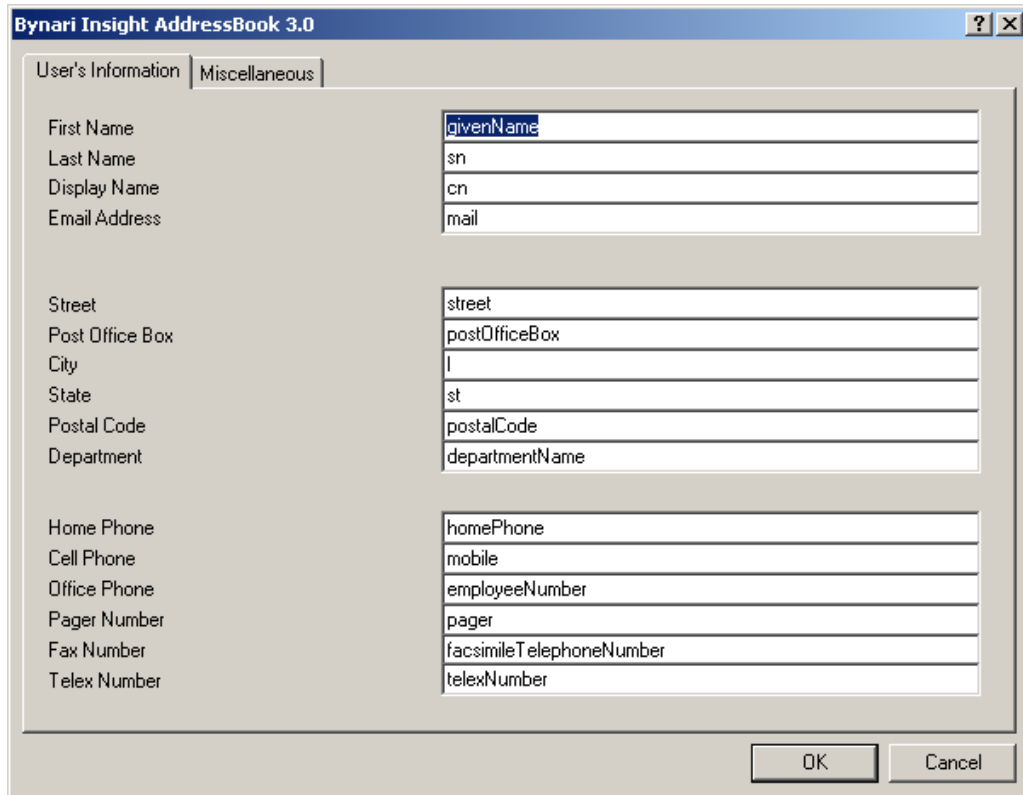


Figure 13 – Insight AddressBook 3.0 LDAP Attributes

6. All fields in the LDAP Attributes dialog window are configurable. In the example shown in the figure above, the “Last Name” attribute was changed to “sn” and the “Display Name” was changed to “cn” to match the LDAP directory structure. As mentioned in step 3, an LDAP browser can be very helpful in configuring these parameters. Select “OK” when finished editing.
7. Reset Filters:
This option will reset the filters in the “Filters for Users”, “LDAP Filter for Groups”, and “LDAP Search Attributes” to match the schemas.xml file.
8. Detect Filters:
This option will detect which LDAP server you are using – provided that it is already configured in the schemas.xml file. This can be very useful for installations where multiple LDAP directories are used. A single schemas.xml file can be configured for multiple servers and used for multiple installations. By default, “Detect Filters” automatically recognizes Insight Server and neonInsight Server LDAP schemas.
9. BaseDN:
The top level of the LDAP directory tree is the base, referred to as the “base DN”

By Default Insight Addressbook attempts to determine your LDAP base DN by your User DN, which you specified on the “General” tab. Here you may specify your base DN, if Insight Addressbook is unable to determine your base DN or you get results other than expected.

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10. LDAP Server Version:
This feature automatically detects if the LDAP server is version 2 or 3 and adjusts accordingly when the “Detect” button is selected.
11. Clear Cache Now:
The Insight AddressBook 3.0 keeps a local cache of the LDAP directory. The local cache increases performance and reduces network traffic to the LDAP server. If a user loses access to an LDAP server (server goes offline or network outage), the local cache will allow the user to continue to function. Selecting the “Clear Cache Now” button will clear the local cache.
12. Select “OK” when finished editing configuration fields.

4.3.4 Cache Tab

Clear Cache Now:

The Insight AddressBook 3.0 keeps a local cache of the LDAP directory. The local cache increases performance and reduces network traffic to the LDAP server. If a user loses access to an LDAP server (server goes offline or network outage), the local cache will allow the user to continue to function. Selecting the “Clear Cache Now” button will clear the local cache.

4.3.5 About Tab

The About tab contains software version information and licensing information.

5 The schemas.xml file

The Insight AddressBook 3.0 is capable of manual configuration or configuration using the schemas.xml file. The schemas.xml file, by default, is preconfigured for both the Insight Server 4.3 and the neonInsight 5.0 LDAP schemas. By default, the Insight AddressBook 3.0 will automatically detect which version of LDAP server you are connecting to, Insight Server 4.3 or neonInsight 5.0.

Customizing the schemas.xml file allows you to configure your LDAP server settings for use with the address book. Once customized, this file can be copied to the:
C:\Program Files\Bynari, Inc\Bynari Insight AddressBook For Outlook
directory for each installation.

As mentioned in step 25 of section 4.2 (Configuring the Insight AddressBook 3.0), it is recommended that a LDAP directory browser or similar tool be used to configure the schemas.xml file.

5.1 Schemas.xml structure

The schemas.xml file is organized into the following components:

- objectClass value
 - userFilter
 - groupFilter
 - searchAttribute
 - attributes

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5.1.1 objectClass

objectClasses are the means for including attributes – an “attribute container”. The objectClass is also an attribute itself and can be included in search queries. All attributes must be defined within an objectClass.

For the following description of the schemas.xml file, refer to the included schemas.xml file with the Insight AddressBook 3.0.

The structure for the objectClass in the schemas.xml file:

```
<objectClass value="neonInsightDomain" description="neonInsight Server">
```

The Object Identifier (OID) is neonInsightDomain which is the global unique identifier for this objectClass.

5.1.2 userFilter

The userFilter is used to search for users in the LDAP database at the sub-domain level. Contained within the userFilter attribute is at least one objectClass.

The structure for the userFilter in the schemas.xml file:

```
<userFilter>((objectClass=neonPerson)(objectClass=groupOfNames))</userFilter>
```

The objectClass “neonPerson” refers to the actual username; the objectClass “groupOfNames” refers to the LDAP group where this user belongs.

5.1.3 groupFilter

The groupFilter is used to search for groups in the LDAP database at the domain level. Contained within the groupFilter attribute is at least one objectClass.

The structure for the groupFilter in the schemas.xml file:

```
<groupFilter>((objectClass=organization)(objectClass=neonInsightDomain)(objectClass=dcObject))</groupFilter>
```

The objectClasses “organization”, “neonInsightDomain”, and “dcObject” are all objectClass components of the Domain Component.

5.1.4 searchAttribute

The searchAttribute is a custom attribute developed for the purpose of name resolution in user-level queries. This attribute does not contain an objectClass attribute.

The structure for the searchAttribute in the schemas.xml file:

```
<searchAttribute>cn;mail;givenName;sn</searchAttribute>
```

The criteria used in the search attribute can be changed to meet your LDAP structural needs. This information can be found with the user’s container name or unique identifier in the LDAP database. An LDAP browser can quickly display these parameters. In this example, the data refers to the following information:

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- cn = Container Name. Typically, this is the user's full name.
- mail = User's email address
- givenName = Typically, this is the user's first name.
- sn = Surname or last name

5.1.5 attributes

The attributes section of the schemas.xml file contains information related to the specific user. The following is a list of the parameters of the attributes section:


```
<FirstName>givenName</FirstName>
<LastName>sn</LastName>
<DisplayName>cn</DisplayName>
<EmailAddress>mail</EmailAddress>
<Street>street</Street>
<PostOfficeBox>postOfficeBox</PostOfficeBox>
<City>l</City>
<State>st</State>
<PostalCode>postalCode</PostalCode>
<Department>departmentName</Department>
<HomePhone>homePhone</HomePhone>
<CellPhone>mobile</CellPhone>
<OfficePhone>employeeNumber</OfficePhone>
<PagerNumber>pager</PagerNumber>
<FaxNumber>facsimileTelephoneNumber</FaxNumber>
<TelexNumber>telexNumber</TelexNumber>
<Title>title</Title>
<OfficeName>departmentNumber</OfficeName>
<Description>description</Description>
<Server>mailHost</Server>
<Alias>mailAlias</Alias>
<DistinguishedName>dn</DistinguishedName>
```

6 Using the Insight AddressBook 3.0

To use the Insight AddressBook 3.0, go to the same standard Outlook address book. The Insight AddressBook 3.0 is accessed by selecting the address book icon  in the Outlook tool bar or by using the "To...", "CC...", or "BCC..." options when composing an email.

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6.1 Outlook address book icon

Using the address book icon  will open the Insight AddressBook 3.0 dialog window.

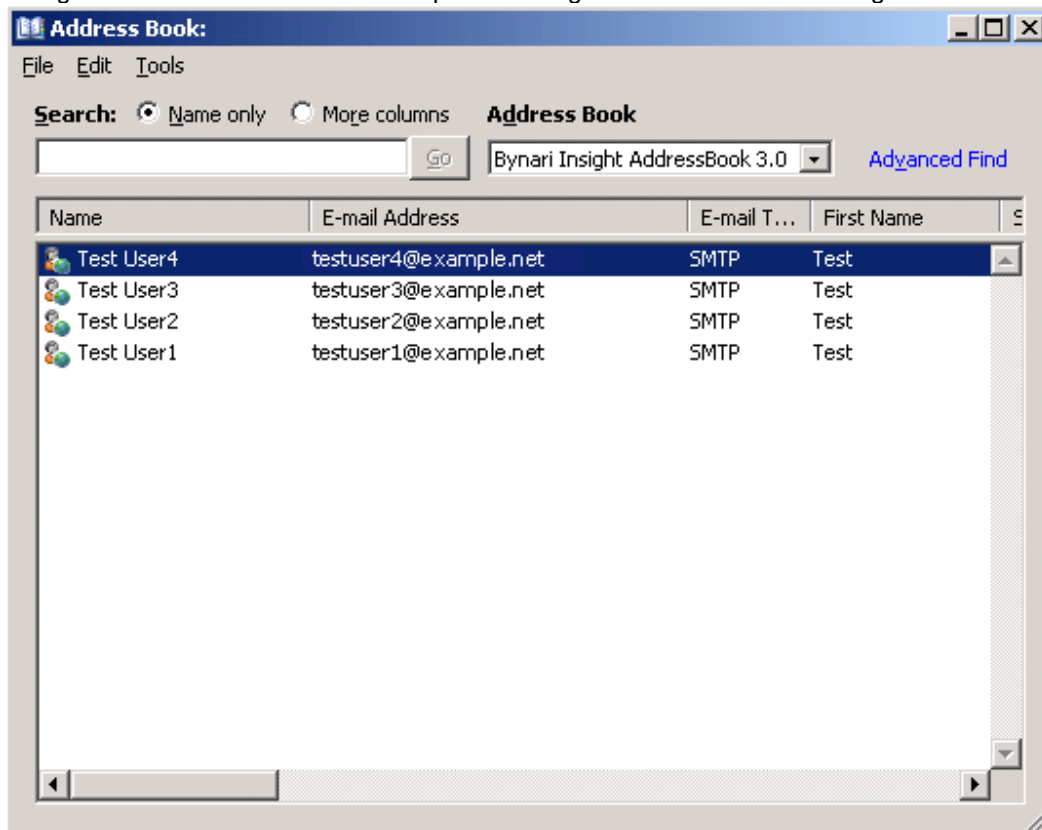


Figure 14 – Insight AddressBook 3.0 dialog

Bynari Insight AddressBook 3.0

In this dialog window, all of the users within the LDAP searchAttribute (for details see section 5.1.4) are displayed. This dialog window also gives you the ability to view detailed, published user information. By double-clicking on a username, a properties dialog window will open displaying further details about the user, if provided.

User's Information	
First Name	Test
Last Name	User 1
Display Name	Test User1
Email Address	testuser1@example.net
Street	1313 Mockingbird Ln
Post Office Box	
City	Mayfield
State	IL
Postal Code	37890
Department	
Home Phone	(999)333-2929
Cell Phone	(999)555-2323
Office Phone	
Pager Number	(999)555-4545
Fax Number	(999)555-3434
Telex Number	
<input type="button" value="Add to Contacts"/>	
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/>	

Figure 15 – Insight AddressBook 3.0 user properties

Selecting the “Add to Contacts” button will automatically insert the displayed information into a Microsoft Outlook™ contact form. Information can be quickly transferred into your personal contacts from the LDAP server.

6.2 Using To, CC, BCC

When composing an email and using the “To...”, “CC...”, or “BCC...” options, a different Insight AddressBook 3.0 dialog window will open.

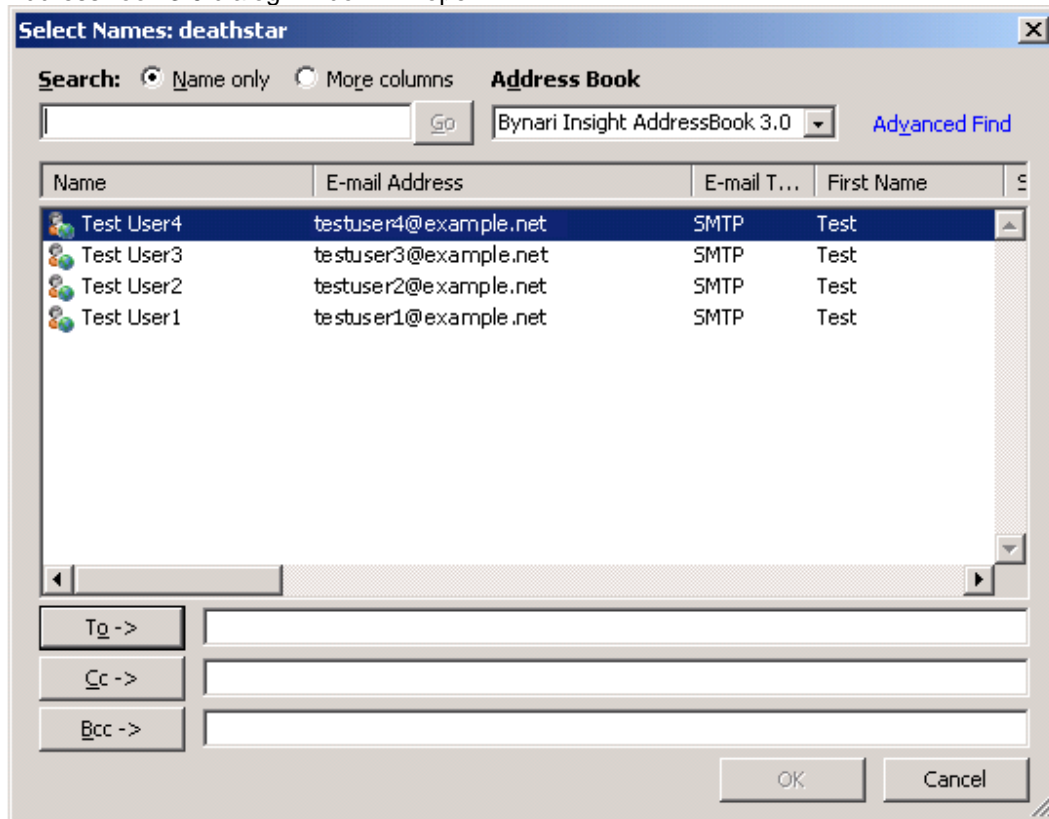


Figure 16 – Insight AddressBook 3.0 Using To..., CC..., or BCC...

To address your email, select the person’s name and press either the “To ->”, “Cc ->”, or “Bcc ->” buttons at the bottom. To select multiple names, hold down the Ctrl key and select with the mouse.

6.3 Search Feature

The search feature of AddressBook 3.0 allows for custom searching of users within their groups or searches throughout the LDAP directory (deep search).

To perform a search, the Outlook address book dialog window must be opened. Below are examples of what Outlook 2000-2007 address book windows looks like. The search button has been highlighted in each of the following examples as well.

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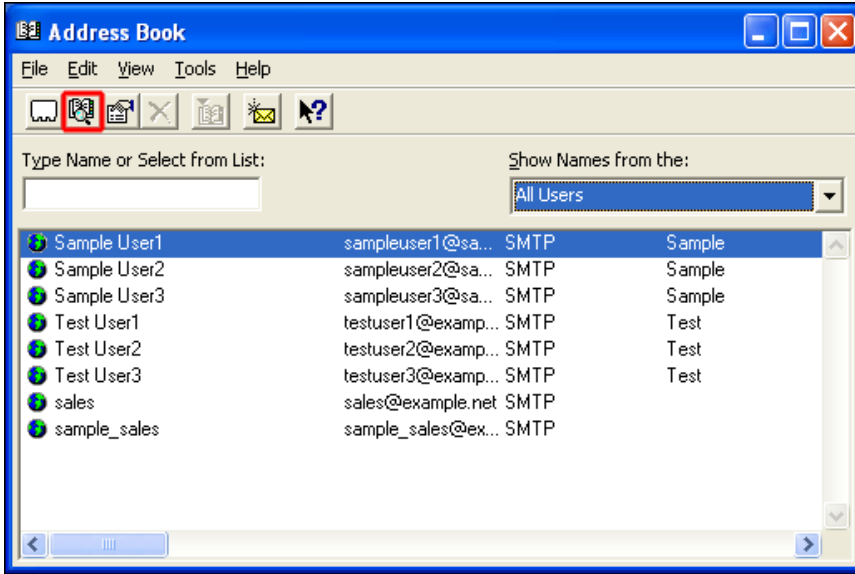


Figure 17 – Insight AddressBook 3.0 – Outlook 2000-2002 address book

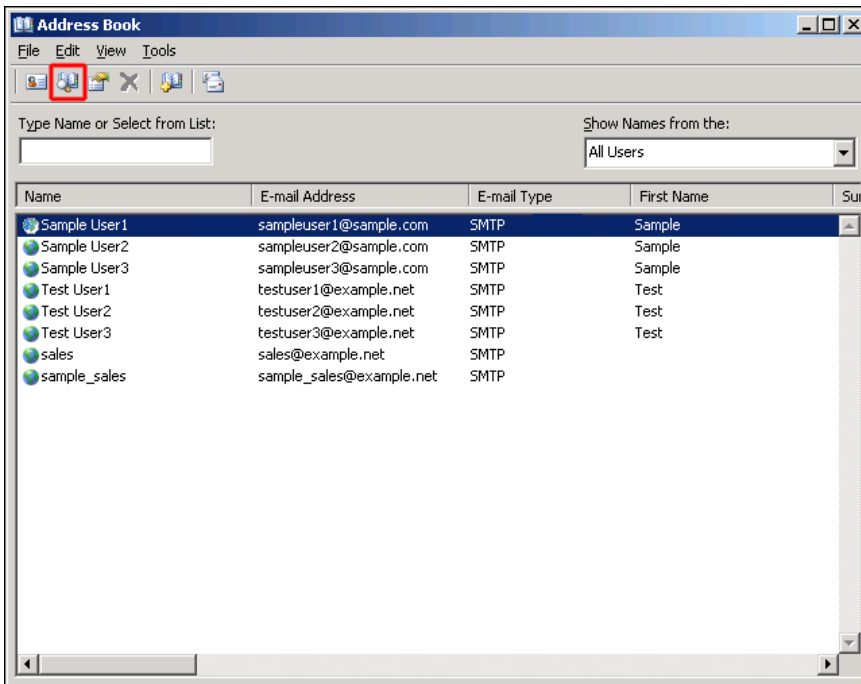


Figure 18 – Insight AddressBook 3.0 – Outlook 2003 address book

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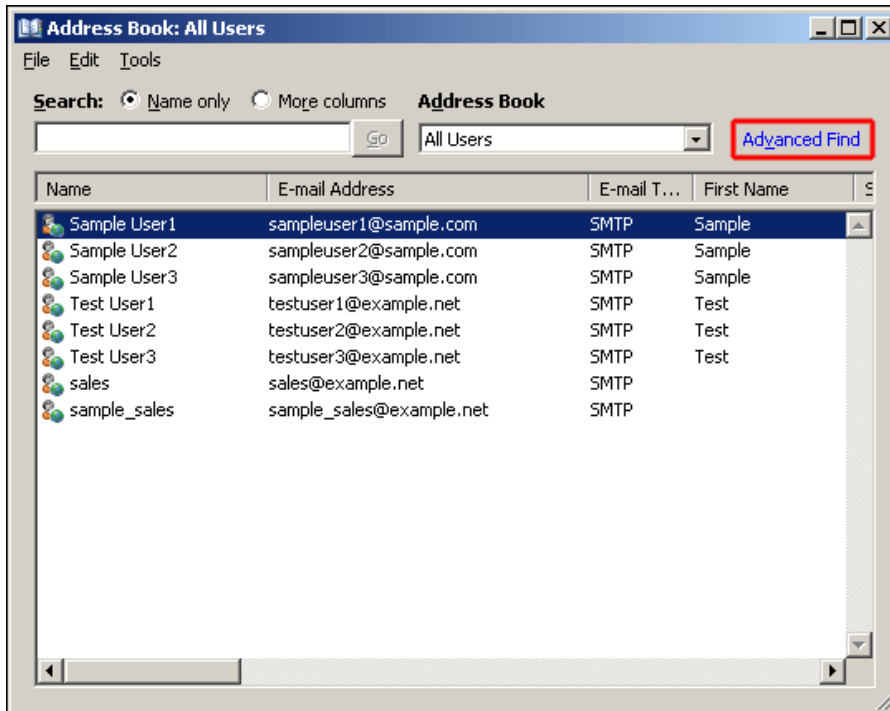


Figure 19 – Insight AddressBook 3.0 – Outlook 2007 address book

Selecting the search button in the Outlook address book window will display the Insight AddressBook 3.0 deep search tool.

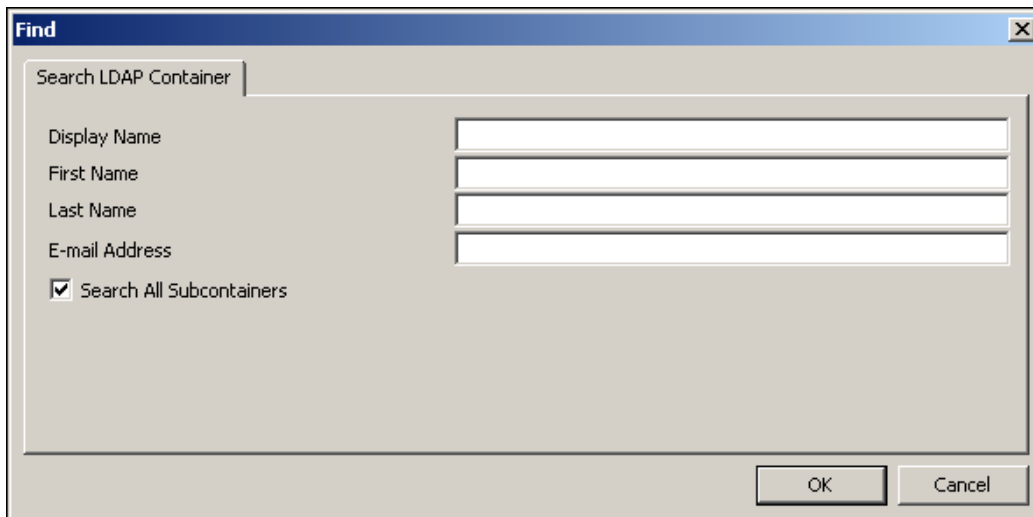


Figure 20 – Insight AddressBook 3.0 – Search Tool

The search tool will search within the container that is displayed in the Outlook address book. For example, if the "All Users" container is selected, the search tool will search through all users. If the "Sales" container was selected, then the search would be limited to the "Sales" container.

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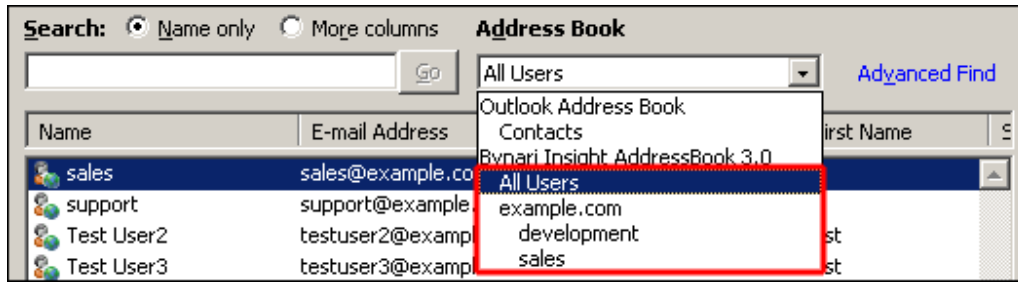


Figure 21 – Insight AddressBook 3.0 – All User Container

When entering search criteria, partial names or even single letters can be used to broaden the search. Search results will be displayed in the Outlook address book under the heading, “Search Results” (see figure below).

NOTE: The deep search tool searches the actual LDAP database NOT the local cache. Network connectivity to the LDAP database is required when using the search tool.

“Search All Subcontainers” is the component that actually performs the deep search function. For best results, leave this feature enabled.

6.4 Outlook Contacts

The Insight AddressBook 3.0 also gives you the ability to select contacts from the Outlook Contacts folder.

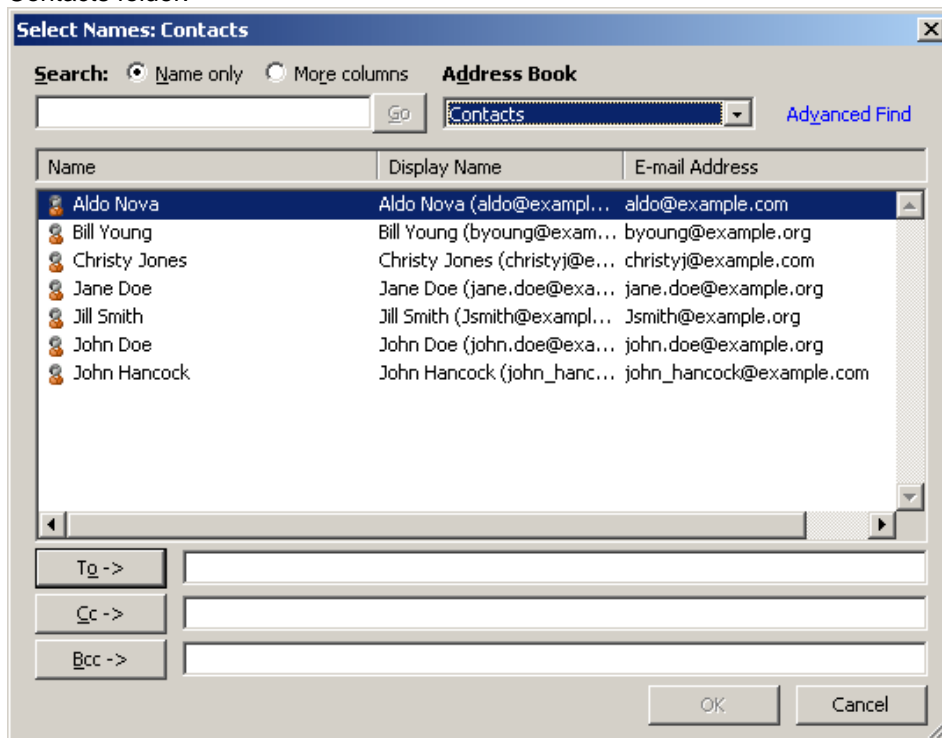


Figure 22 – Insight AddressBook 3.0 Outlook Contacts

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Once the names have been selected, press “OK” to insert them into the email you are composing.

7 Registering Insight AddressBook 3.0

The Insight AddressBook 3.0 requires a license key for proper registration. License keys can be obtained by contacting sales@bynari.net.

NOTE: The license key for Insight AddressBook 3.0 is different from the license key in Insight AddressBook 2.0. If you are upgrading from Insight AddressBook 2.0, please contact sales@bynari.net for a new license key.

To register the Insight AddressBook 3.0, open the Insight AddressBook 3.0 configuration window. For details on locating the configuration window, see section 4.3 “Configuring the Insight AddressBook 3.0” in this guide. Once the configuration window is open, select the “About” tab.

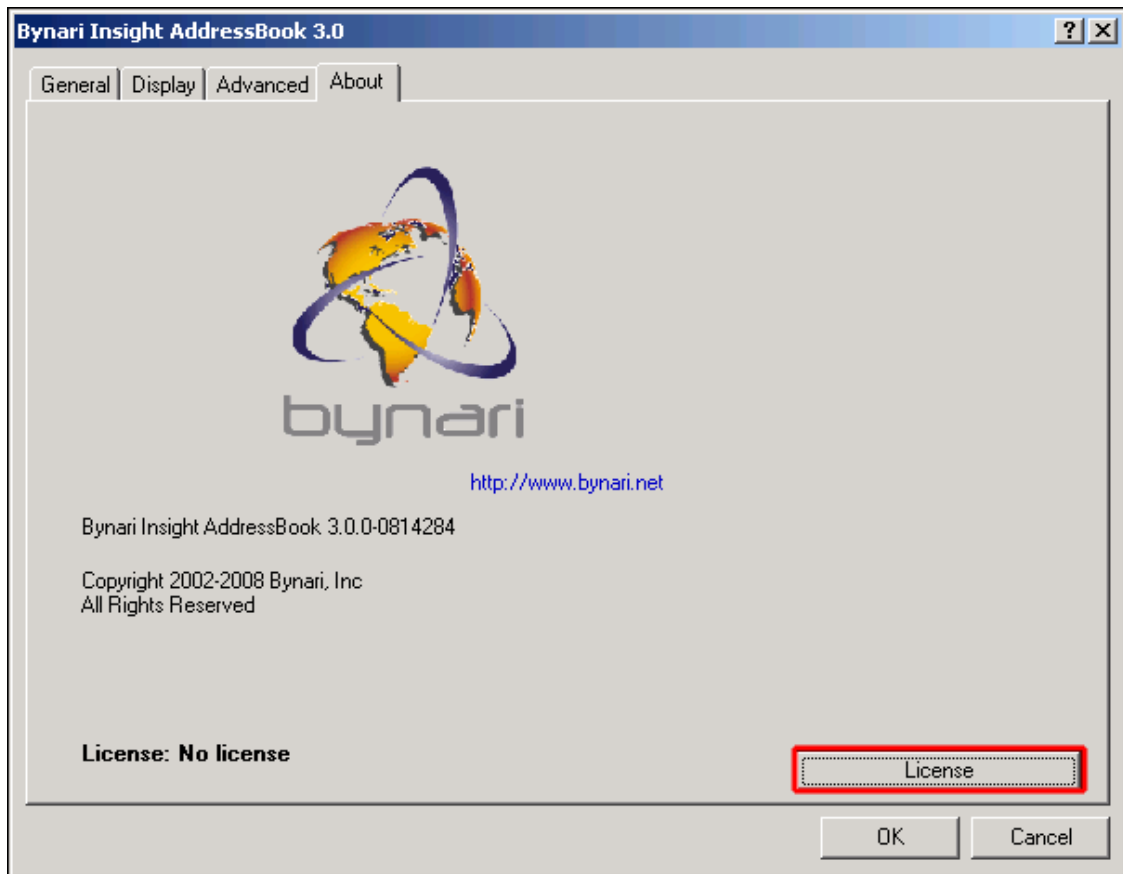


Figure 23 – Insight AddressBook 3.0 – Registration

Selecting the “License” button will open a new dialog window.

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Bynari Insight AddressBook 3.0

Bynari Insight AddressBook License Registration

Bynari Insight AddressBook License Registration

Enter your product license key:

1234a123b1c123456d1234e12345f12g

Manual Registration

Enter the license certificate below:

Which port would you like to use for the registration? 80

OK Cancel

Figure 24 – Insight AddressBook 3.0 – Registration

In this dialog window, enter the Insight AddressBook 3.0 license key code and select “OK”. Selecting “OK” will display a license key confirmation dialog window.

If the workstation being registered is behind a firewall or if port 80 is blocked, port 3080 can be configured by using the pull-down menu.

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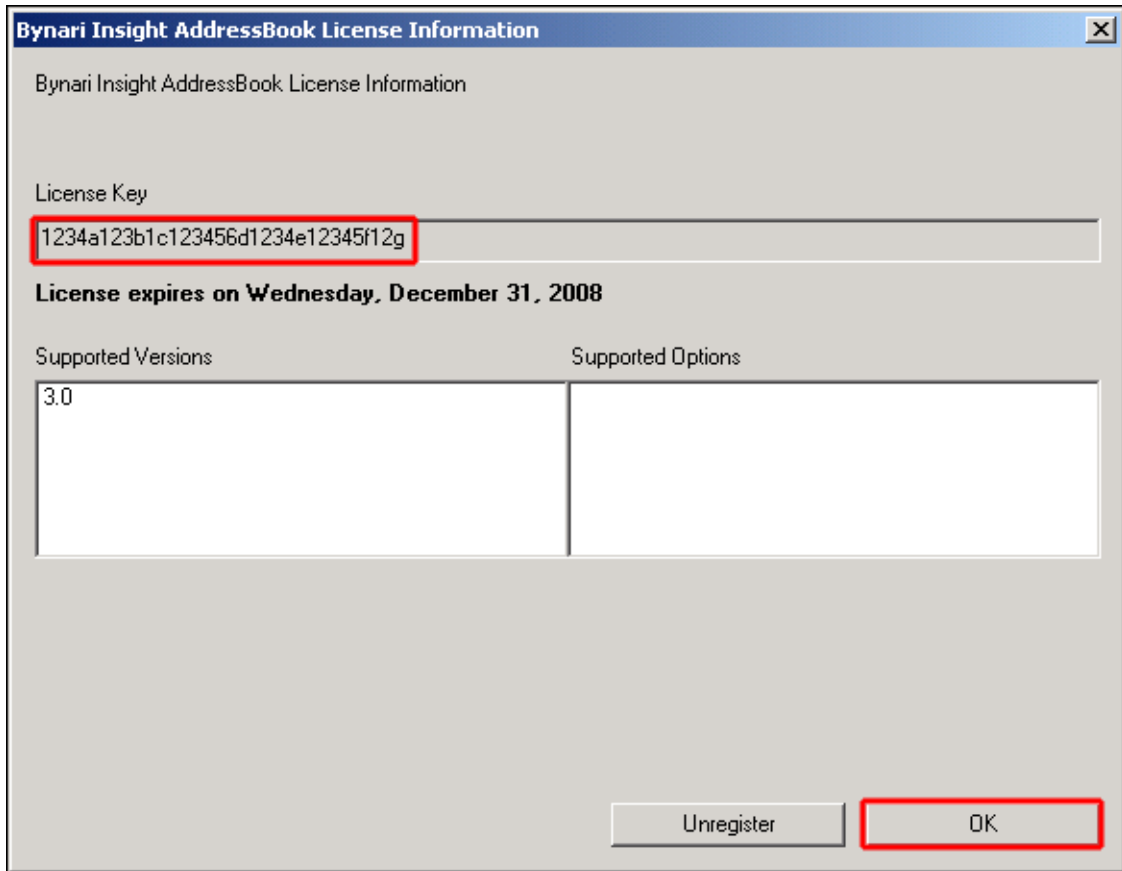


Figure 25 – Insight AddressBook 3.0 – Registration

The Insight AddressBook 3.0 can also be unregistered from this window by selecting the “Unregister” button. Select “OK” to close this window and finish the registration process.

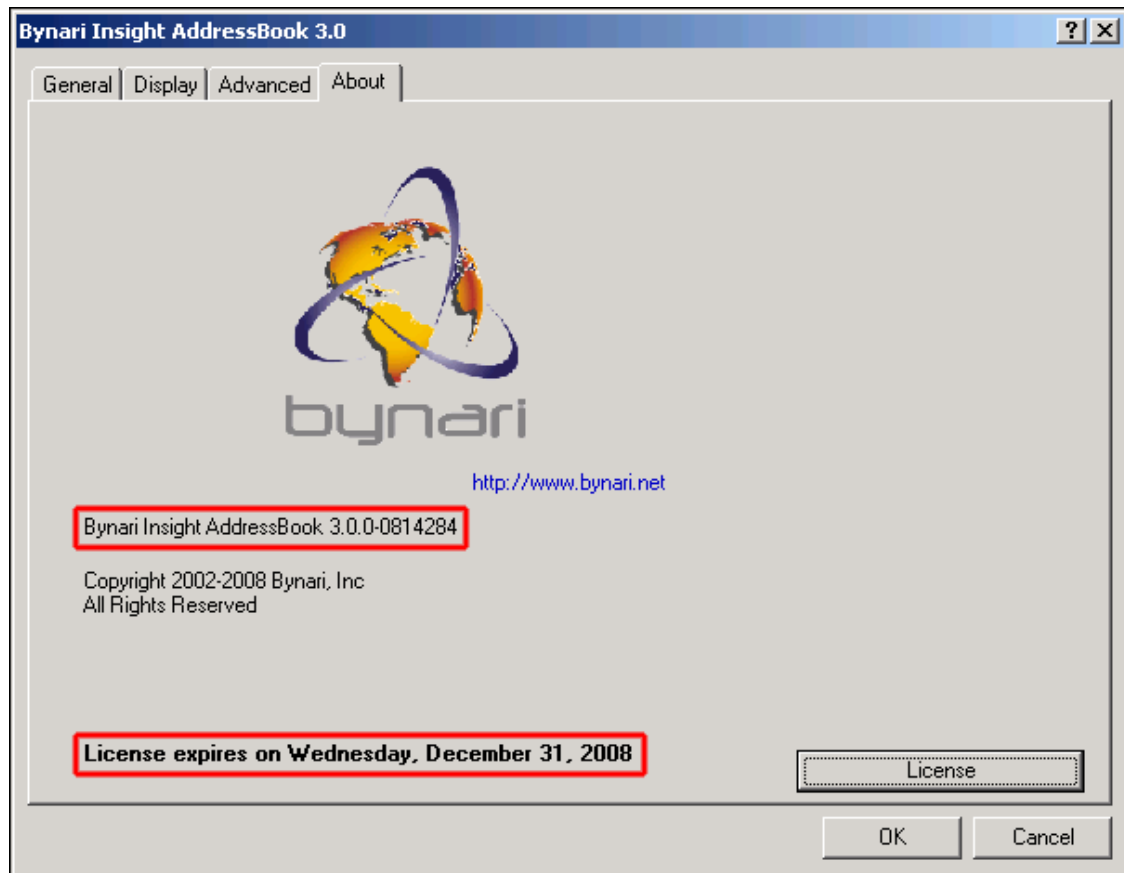


Figure 26 – Insight AddressBook 3.0 – Registration

When the Insight AddressBook 3.0 is fully registered, it displays the expiration date on the “About” tab as seen above.

NOTE: If technical assistance is required, Bynari technical support staff will ask for the software version number. This number is located on the “About” tab. In the figure above, it is highlighted in red.

7.1 Manual Registration

If the product fails to register through the normal registration process, manual registration will be required.

Following the steps outlined in section 4.3 “Configuring the Insight AddressBook 3.0”, open the Insight AddressBook 3.0 configuration window. Select the “About” tab and then select the “License” button.

NOTE: Manual registration requires a certificate. This certificate is obtained through Bynari support. Email your license key to support@bynari.net and request a manual registration certificate.

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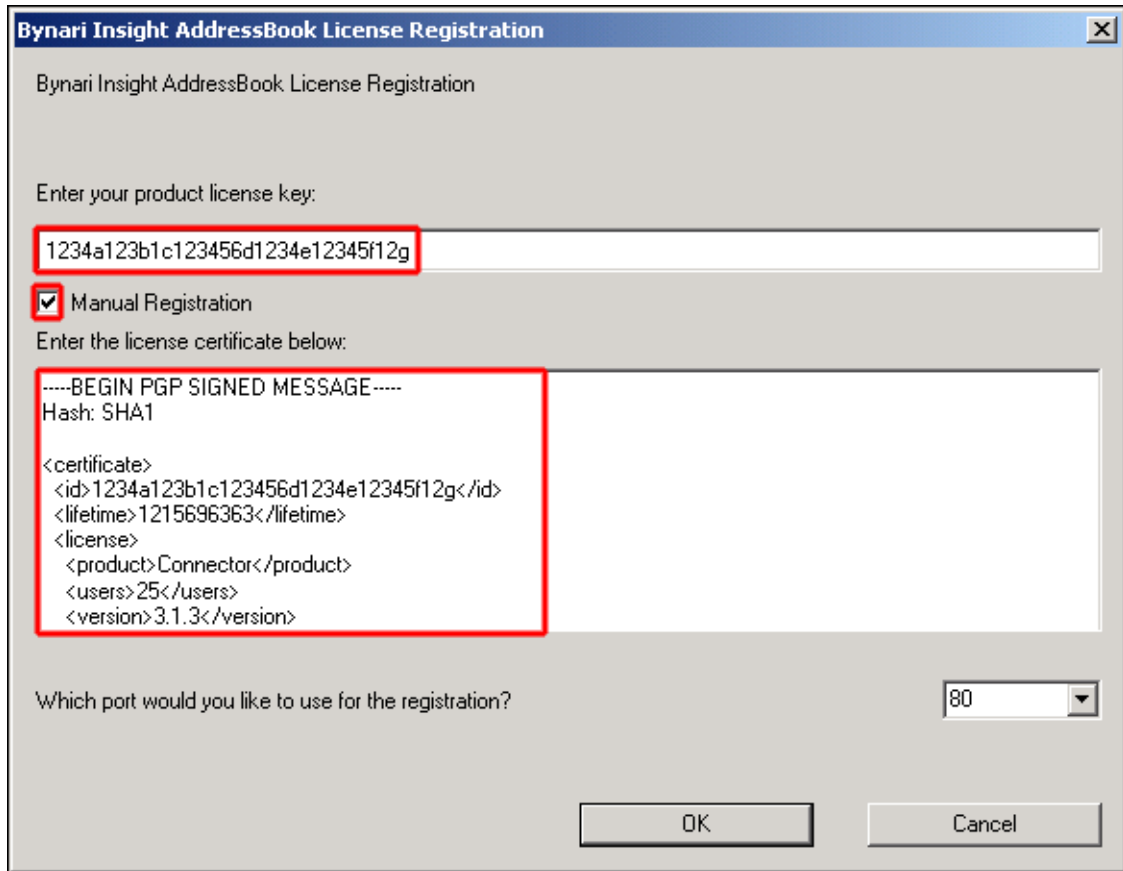


Figure 27 – Insight AddressBook 3.0 – Manual Registration

To enable manual registration, select the “Manual Registration” checkbox as shown in the figure above. This will make the area titled, “Enter the license certificate below:”, active.

Enter the license key on the line titled, “Enter your product license key:”. In the certificate window at the bottom, enter the entire license certificate starting with:

```
-----BEGIN PGP SIGNED MESSAGE-----
```

and ending with:

```
-----END PGP SIGNATURE-----
```

Select “OK” when all of the information has been entered. Confirm the license as in the steps above by selecting “OK” on the license confirmation window. Select “OK” to close the Insight AddressBook 3.0 configuration dialog window. Select “Finish” to close the Outlook E-mail Accounts dialog window.

8 Reporting Problems

When reporting problems, be sure to include the following information:

- Microsoft Windows version number and patch level.
 - Right-click the **My Computer** icon on the Desktop and select **Properties**. The Windows version and patch level will be listed under **System**: in the **General** tab dialog.

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- Microsoft Outlook version and patch level.
 - Right-click **Help** in Outlook and select **About Microsoft Outlook**. The Outlook version and patch level will be listed.
- The full version number of the Insight AddressBook.
 - In Outlook select **Tools > Email Accounts > View or change existing directories or address books**.
 - **Next > Bynari Insight AddressBook 3.0 > Change**
 - Select the **About** tab.
 - The AddressBook version number will be listed.

To contact technical support:

U.S. Toll Free Telephone: 1-800-241-1086

International Telephone: 001-214-350-5772

To open a new support ticket: <http://www.bynari.net/support/>

For FAQs: <http://www.bynari.net/users/kb.php>

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