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# Outlook Connector User Guide

8.3.0





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## C H A P T E R 1

# Introduction

Congratulations on making the move to Merak and its GroupWare Outlook Connector!

Merak GroupWare Outlook Connector offers unparalleled stability and extremely low maintenance. The Outlook GroupWare Connector is a small plug-in for Microsoft Outlook (versions 2000, XP, 2003) that enables users to synchronize the Calendar (Events/Notes/Tasks), Address Book and Journal entries with the Calendar and Address Book that resides on the Merak Mail Server.

- § User may access these Calendar and Address Book entries from different machines through the Webmail interface.
- § Users are also able to view Calendar and Address Book entries for different users and share entries with others.

This guide is proposed to be a cookbook and a handbook for all users of Merak GroupWare Outlook Connector. This guide's aim is to be easy, quick and clear in explaining the basic principles of Outlook Connector behavior and usage. This guide is for regular users of Outlook; Merak Mail Server administrators should read advanced GroupWare guide that is available on our website.

Please note, that every setting described here can also be set using WebMail interface.

## CHAPTER 2

# Quick Setup

This chapter is aimed to be a "look and configure" guide for easy and quick setting Outlook GroupWare Connector from installation through successful adding a account, first synchronization to allowing to share and showing shared calendar.

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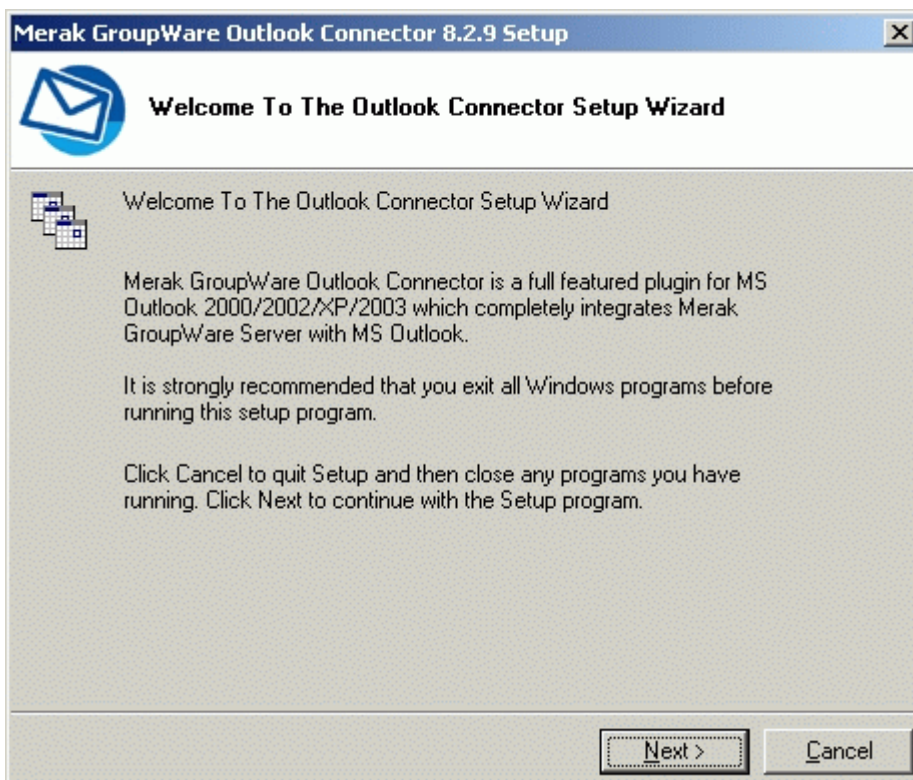
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# Installation

To install a GroupWare Outlook Connector, get latest version of Connector from <http://www.icewarp.com/download/> and install it on each PC for those who will be using GroupWare.

The installation is straightforward and requires minimum configuration. Follow these simple instructions:

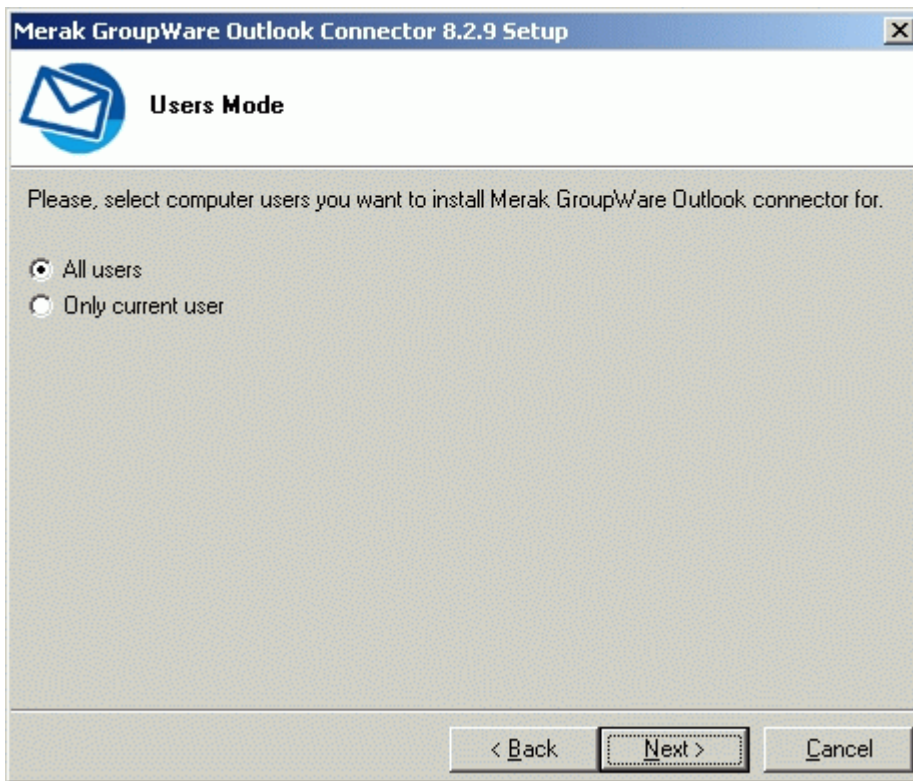
- 1 Obtain the latest package of Merak Groupware Outlook Connector by downloading it from IceWarp's official website (<http://www.icewarp.com/download/>) or from your local reseller.
- 2 Unzip and execute the file `mgwoutlook.exe` - the setup wizard.
- 3 A screen like this will appear. Please read carefully all the displayed notes and obey them.



Click **Next** to proceed.

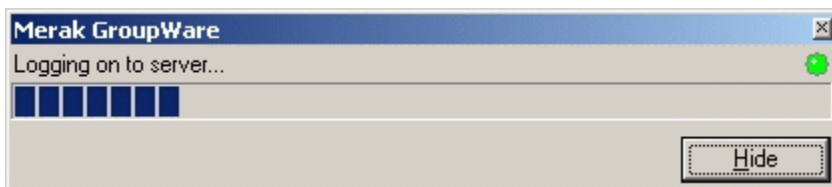
- 4 On the next screen of the setup wizard the License Agreement is displayed. If you agree with the License agreement, click **Next** to continue with installation of Merak GroupWare Outlook Connector. Otherwise, if you do not agree with it, choose now and the setup will be terminated.

- 5 The next screen allows the decision to install the Outlook Connector for all users of the current computer or only for the user currently logged in.



Choose one and click **Next** to continue with the installation.

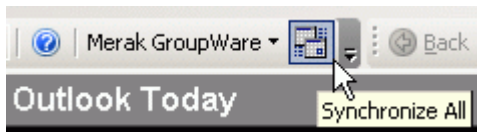
- 6 On this screen of installation wizard the path selection takes place. After the selection click next and proceed with the installation (the files are being copied and the connector is settling on your system and integrating into Outlook itself).
- 7 If this was a first time clean installation of Outlook Connector and account wizard will appear. The "Add Account Wizard" is described in next chapter (see "Add Account Wizard" on page 6) in detail. Follow the instructions in the text.
- 8 After successful installation of Outlook connector a screen informing about the status is displayed.
- 9 Now start your MS Outlook from the common location (ie. Start -- Programs -- Microsoft Office -- Microsoft Outlook) and let the synchronization proceed.



The Outlook Connector will contact the Merak Groupware server, log the user in and synchronize all necessary information for smooth start of your Outlook.



- 10** The Merak GroupWare Outlook Connector and an icon for Synchronize All are located in MS Outlook toolbar.



## Add Account Wizard

The "Add Account Wizard" serves for easy setting of an account in Merak GroupWare Outlook Connector. The Outlook Connector account is integrated with email account on mail server. If you do not have an email account on your server, please contact your mail server administrator to assign you username and password for an email account.

There are two scenarios in which you could need to use this wizard

- § after first installation - this wizard is executed automatically
- § anytime, when an new account is being created using toolbar Merak GroupWare -- Accounts -- Add

The "Add Account Wizard" wizard is easy to use. Simply follow the instructions:

- 1 The first screen is requesting the account's name as displayed in accounts list and personal folder name



**Account Wizard**

**Your Name**

Type your name as you would like it to appear in the accounts list and personal folder name.

Display name:

For example: John Doe

< Back   Next >   Cancel

Type the name into the field and click **Next** to proceed with the setup.

- 2 Now the account properties and login information are to be entered. If you do not know any of them, please contact your mail server administrator and request the following information

- § e-mail address
- § password
- § server

**Account Wizard**

**Account Properties**

Your e-mail address and password are used to logon to the groupware server.

E-mail address:   
For example: john.doe@domain.com

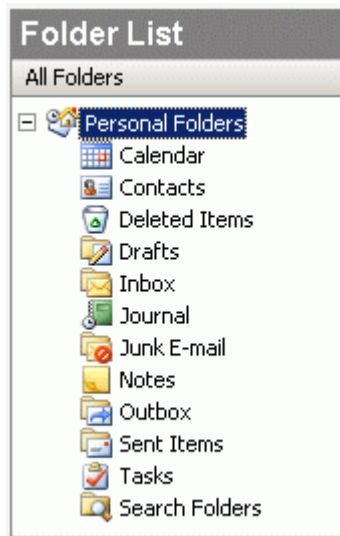
Password:

Server:   
For example: mail.domain.com

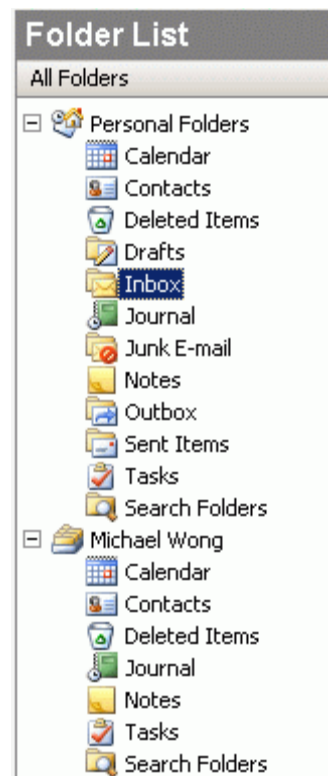
< Back    Next >    Cancel

Type those in and proceed with **Next** button.

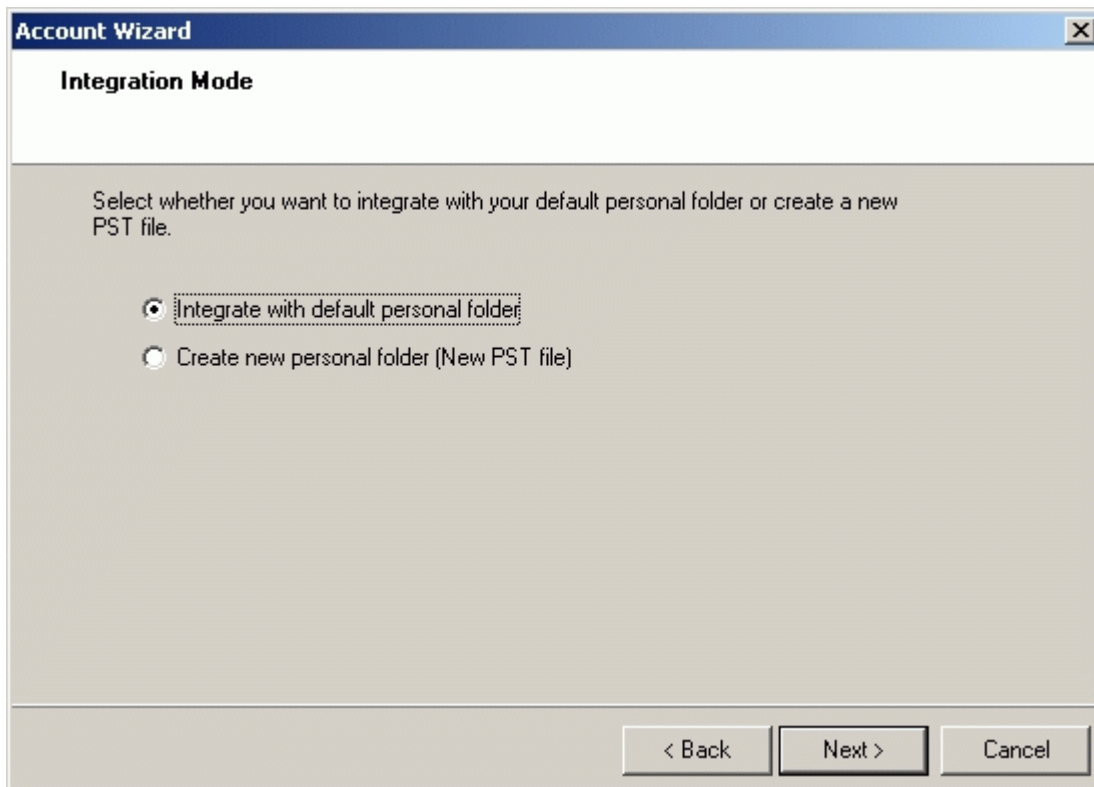
- 3 This screen lets you decide about the integration mode. The integration mode means the way how the account is settled in your MS Outlook. If you choose
  - § Integrate with default personal folder : the currently created account will be bound to the default MS Outlook personal folder. This setting is recommended for most users and if you do not know what does this setting do, leave it in initial position



integrated vs. new PST

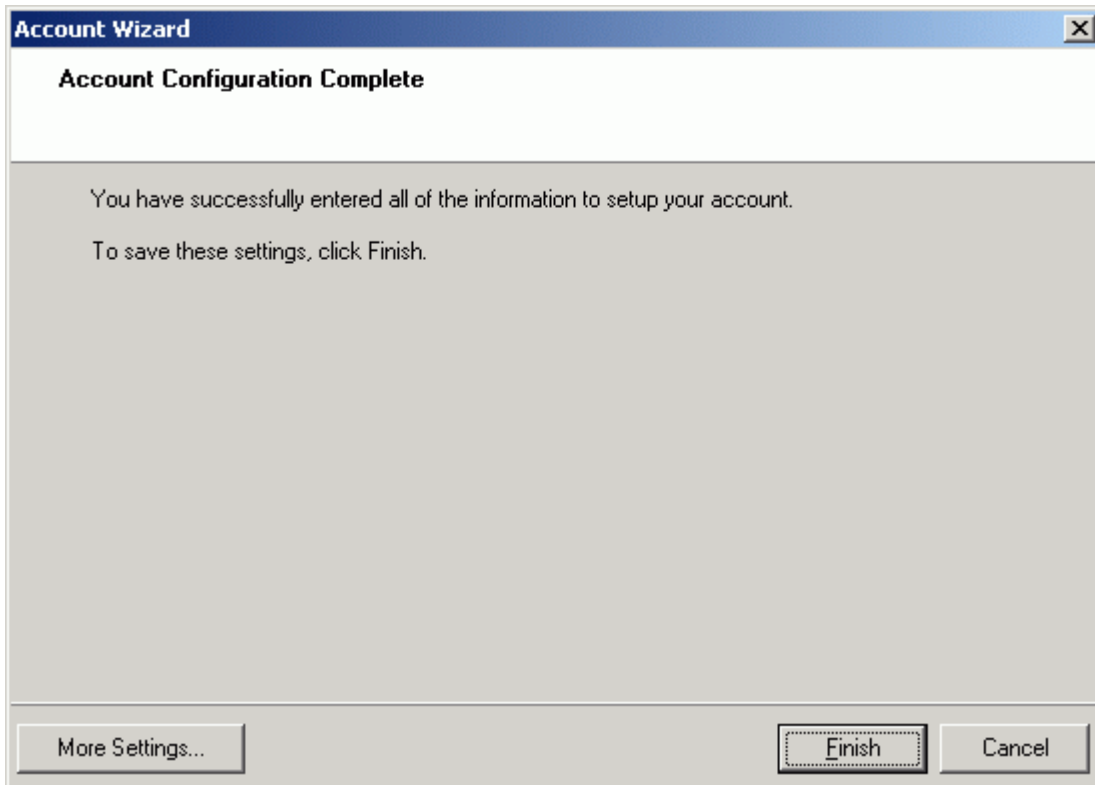


- § Create new personal folder: this setting is useful when you have two or more accounts or you would like to have special PST file for groupware. Use this setting for second and every next new account.



After the selection, click **Next** to proceed with the account wizard.

- 4 The last screen informing about successful setup of the account in GroupWare Outlook Connector.



Click **Finish** button to close the wizard.

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Please note :

- if you executed the wizard from MS Outlook (not as a part in first installation) there is a More Settings button located in the bottom left corner. Clicking on this button you can set an advanced account configuration (see *Advanced Accounts Configuration* (on page 17) chapter for details)

- if you entered the wizard as a part of first time installation, there is no More Settings button what so ever on the last wizards screen (MS Outlook have to be running to access "More Settings" section)

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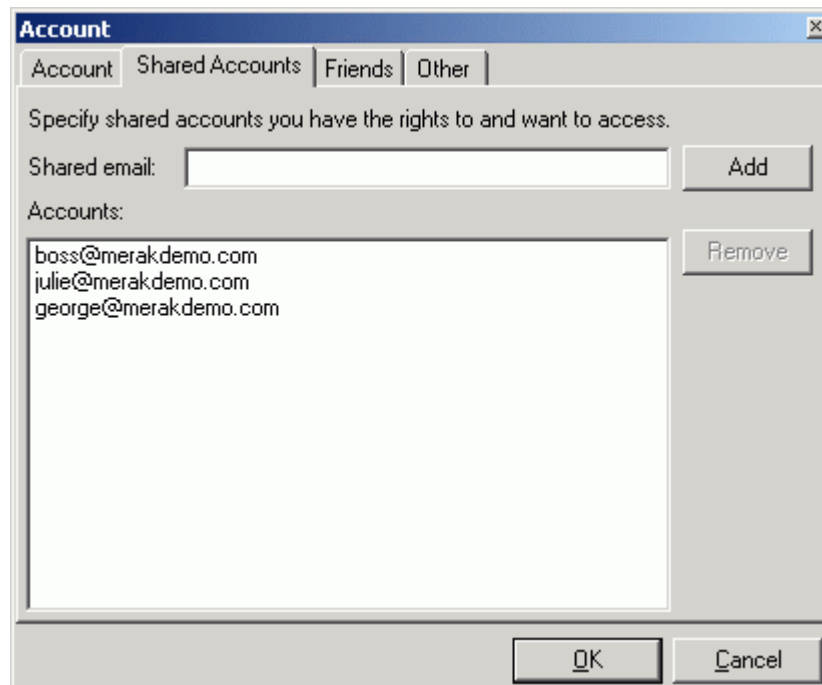
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## How to Show Shared Calendar/Contacts in Outlook

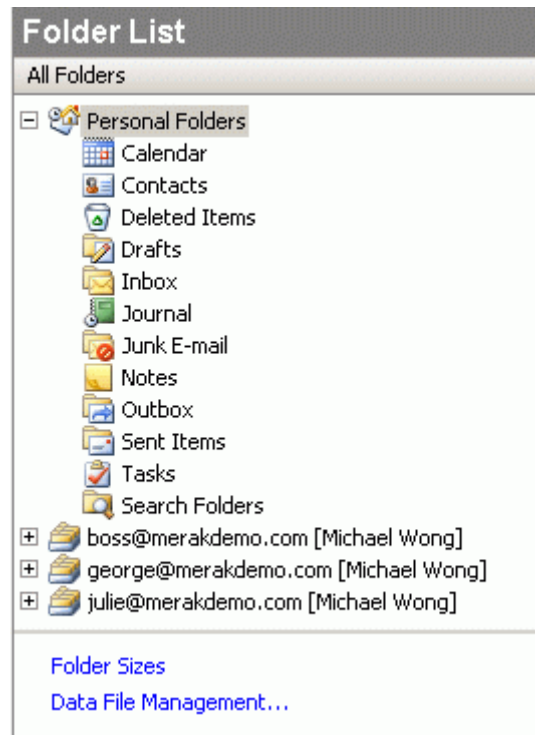
To add a shared calendar into the Outlook Connector use the current account you have already set for your own address. To do so

- 1 click the **Merak Groupware toolbar -- Accounts**
- 2 choose the proper account you want to have shared calendars shown
- 3 click Shared Account tab
- 4 Once there, specify an address of accounts into the blank field "Shared account" and click **Add**.
- 5 The email address will be show in the accounts list, each on separate line.

Example:



After saving the account (clicking OK), new Personal Folders will be created in user's MS Outlook workspace.



After adding an shared account in Outlook 2003, the connector show up only the Deleted Items and Search Folders. Please click on 'All Folders' button in Outlook to access the complete folder list.

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If user wants to remove shared address (his/her Personal Folders) he/she will have to only remove appropriate address from Shared Account tab.



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## How to Allow Others to See My Calendar/Contacts

To share Calendar/Contacts, follow these steps:

### § Set the Friends

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In the following sections only the sharing of Calendar is described, however it is the same for Contacts (Address Book). Once user sets Calendar to be shared, the Contacts are also set to be shared. And once user sets MS Outlook Client to display shared Calendar, it is set also to show the shared Contacts.

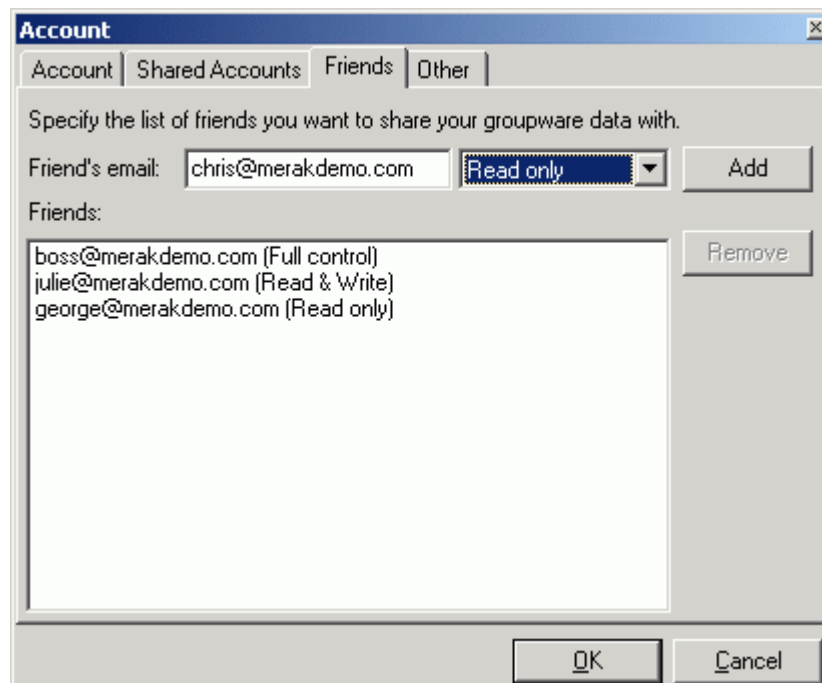
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### Setting the Friends

Now, the user has to fill accounts under Friends and assign them appropriate permissions so they may view Calendar entries.

To do so:

- 1 open up the account setting clicking on **Merak GroupWare toolbar -- Accounts**
- 2 choose account
- 3 click onto **Friends tab**
- 4 enter the friend's email into the blank field
- 5 choose appropriate permissions from the combo menu
- 6 click **Add**



There are three types of permissions which may be assigned to the accounts.



Option	Description
Read only	Public entries and Events with Shows As Busy Sharing
Read & Write	View/modify only Public entries and Events with Shows As Busy Sharing and to add a new entries; entries with Private Sharing are not shown.
Full Control	View/modify all entries including Private and to add any new entry.

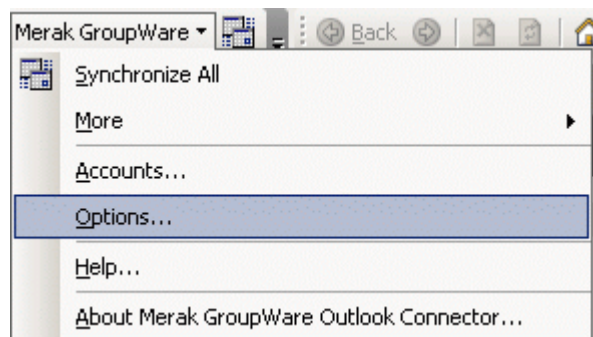
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# Synchronization

Synchronization is a coordination process between Outlook account and GroupWare server through the Outlook Connector plug-in. There are basically three ways of performing bidirectional synchronization of groupware data between the Outlook account and Merak GroupWare server and vice versa.

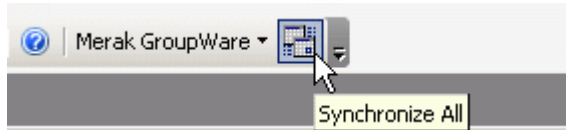
- § synchronization upon Outlook application startup
- § automatical scheduled synchronization after defined time period
- § manually hitting the synchronize all button

The configuration of first two methods can be set in **Outlook Connector options -- General tab**. To access these use:

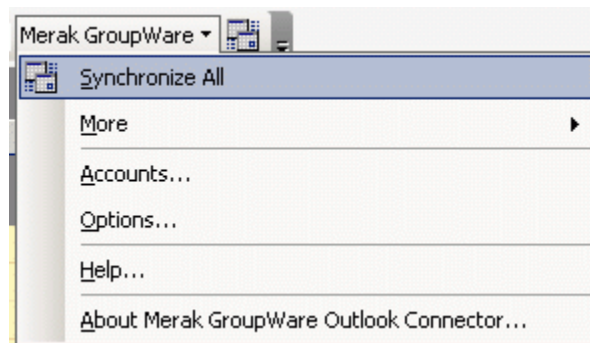


Merak GroupWare toolbar and choose Options -- General Tab.

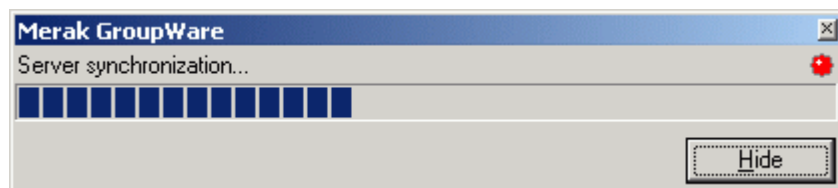
Manual synchronization is performed after hitting the "**Synchronize All**" button on the Merak GroupWare toolbar.



or here



The synchronization process is displayed (defaults) with a pop-up progress bar. The progress bar can be hid (see section ***Outlook Connector Options -- General Tab*** (see "General Tab" on page 28)).

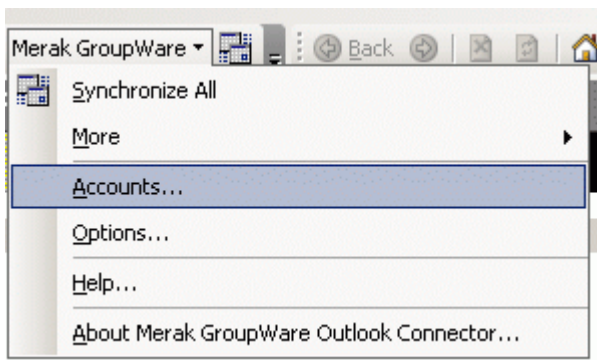


## CHAPTER 3

# Advanced Accounts Configuration

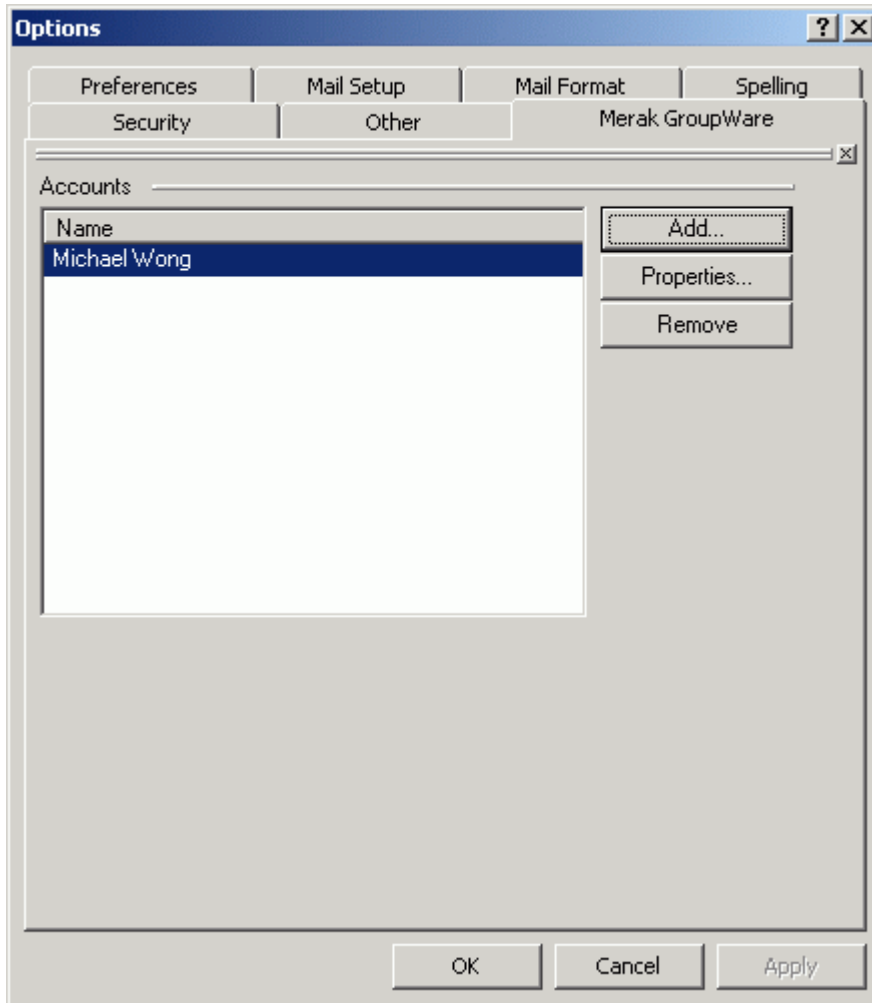
This chapter describes in detail the possibilities of account configuration within Outlook Connector. This is also where you should look when setting an account with wizard and using the "More settings" button. This chapter has a reference style, which means every option's functionality is described with the particular meaning and usage example.

To enter these accounts settings use



§ Merak GroupWare toolbar -- Accounts -- choose one account -- Properties

§ Outlook menu -- Tools -- Merak GroupWare -- choose one account -- Properties



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## Account Tab

On the Account tab, here is the possibility to change account information that were assigned during the usage of "Add Account Wizard" (see chapter *Quick Setup -- Add Account Wizard* (see "Add Account Wizard" on page 6)). You can alter

- § name of the account that is displayed on the account list and as a name of PST
- § e-mail address that is used for communication with groupware server
- § password of the account
- § additional security configuration (SSL, plain text password)

SSL is an security standard providing authentication and communications privacy over the Internet using cryptography. Plain text passwords have substantial meaning when your account is authenticated against Merak with some disabled security options. If you are unsure about setting of these option, contact your mail server administrator.

This is the account tab interface, below the picture you can find the explanation of all configurable elements.

The screenshot shows a Windows-style dialog box titled "Account". It has four tabs: "Account", "Shared Accounts", "Friends", and "Other", with "Account" being the active tab. The dialog contains several text input fields and three checkboxes. The "Name" field contains "Michael Wong". The "Email address" field contains "m.wong@merakdemo.com". The "Password" field is masked with "xxxxxxxxxx". The "Server" field contains "mail.merakdemo.com". Below these fields are three checkboxes: "Use SSL connection" (unchecked), "Use plain text passwords" (unchecked), and "Integrate with default personal folder" (checked). At the bottom right are "OK" and "Cancel" buttons.

Field	Value
Name	Michael Wong
Email address	m.wong@merakdemo.com
Password	xxxxxxxxxx
Server	mail.merakdemo.com

Use SSL connection ☐

Use plain text passwords ☐

Integrate with default personal folder ☒

OK Cancel

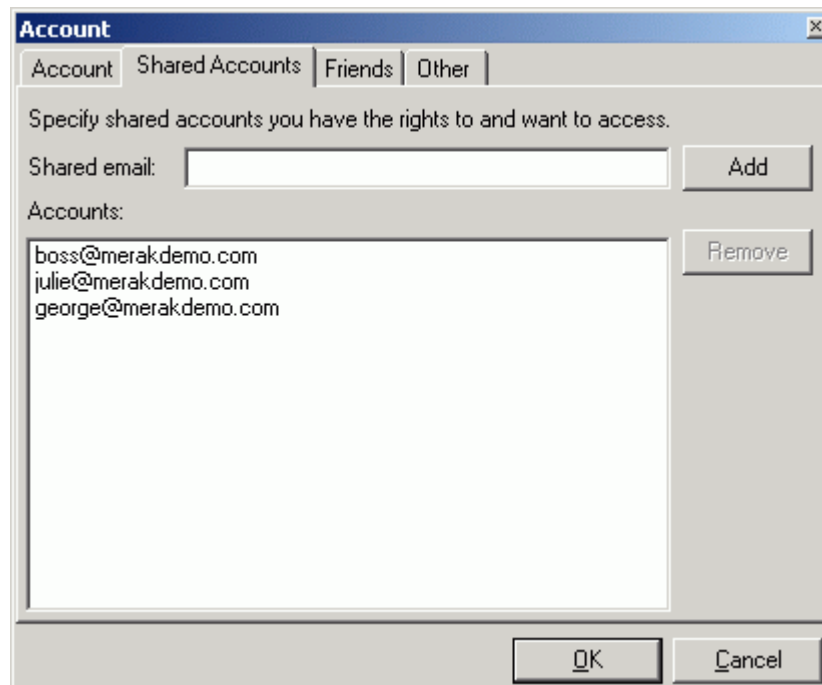
Option	Description
Name	For descriptive purposes - name is shown in a list of accounts in GroupWare properties dialog and also as a Name of Personal Folder which is created for this account
Email Address	Email address of user's account
Password	Password for appropriate email address
Server	IP address or hostname of Merak server
Use SSL connection	Enables the secure SSL encryption of communication between server and the account
Use plain text passwords	Disables secure authentication mechanisms.
Integrate with default personal folder	Have only informative meaning. If ticked the account is integrated with default personal folder, if not, there is separate PST file for this account.



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## Shared Accounts Tab

Shared Accounts tab serves as the place for adding shared calendars that you have right and want to access.



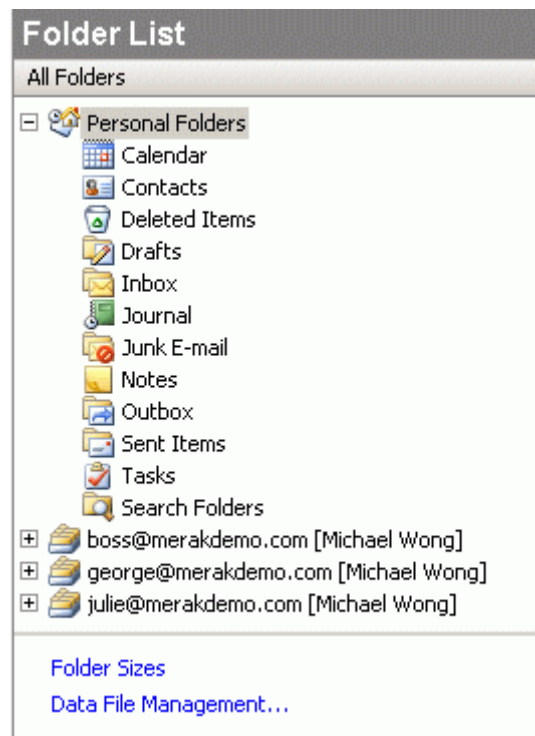
Specify each address of person whose Calendar/Address Book you want to show into the "Shared email" field and hit **Add**. Outlook Connector automatically creates Personal Folders for those accounts. If it is set like on the figure above three Personal Folders will be created after saving the account (after hitting **OK**)

After a new account is created, a new Personal folder appears in Folder List.

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After adding an shared account in Outlook 2003, the connector show up only the Deleted Items and Search Folders. Please click on 'All Folders' button in Outlook to access the complete folder list.

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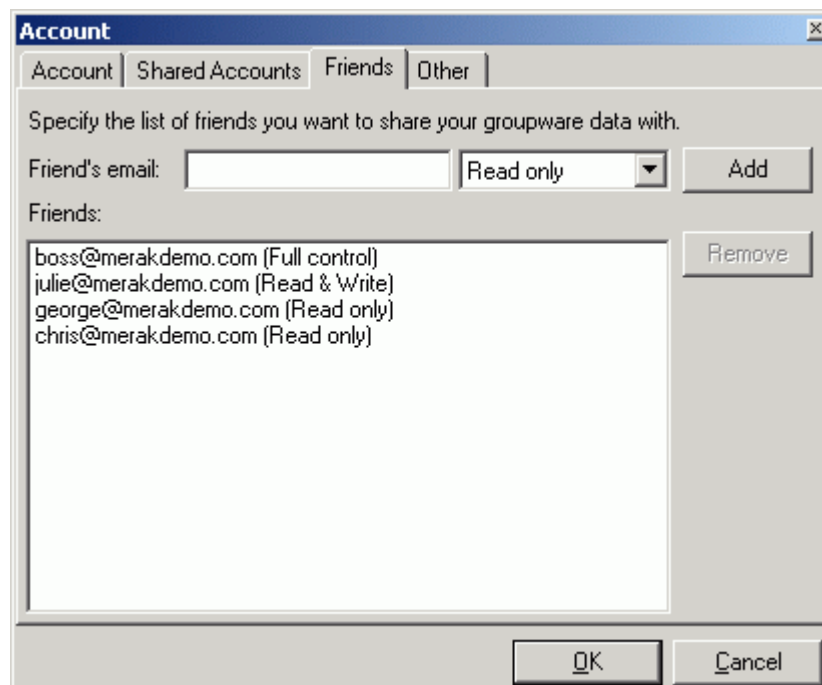


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## Friends Tab

Friends tab gives you the possibility to make your calendar accessible and open it up for various - here defined - users with appropriate permissions. The users who are eligible to access your calendar are called Friends.

To add a friend - the person you would like to share you groupware data (calendar, address book, etc.) with - simply type in the person's email address into the "Friend's email" field and choose the permission from the combo-box.



There are three types of permissions which may be assigned to the accounts.



Option	Description
Read only	Public entries and Events with Shows As Busy Sharing
Read & Write	View/modify only Public entries and Events with Shows As Busy Sharing and to add a new entries; entries with Private Sharing are not shown.
Full Control	View/modify all entries and to add any new entry.

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## Other Tab

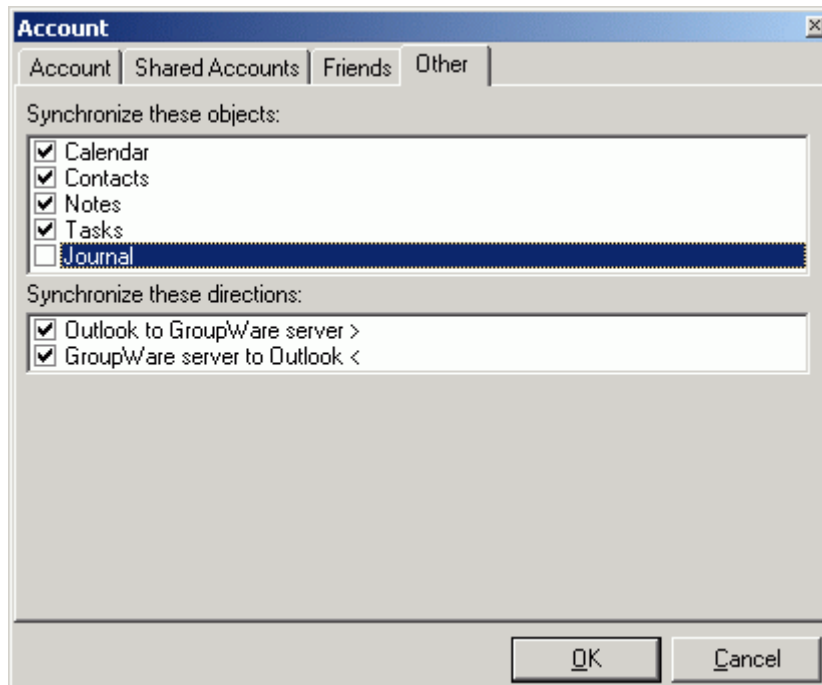
Other tab extends the possibility in meaning of restriction the objects that are synchronizable. In common usage you preferably leave the default settings.

In the section "Synchronize these objects" you specify the object synchronization permission by ticking or unticking the particular object checkbox. In the example below, only the Journal entries are excluded from the synchronization process.

The Outlook Connector allows user three methods of synchronization:

- § Outlook To GroupWare Server
- § GroupWare Server To Outlook
- § All (both are enabled)

The Synchronize All option processes synchronization according to this configuration.



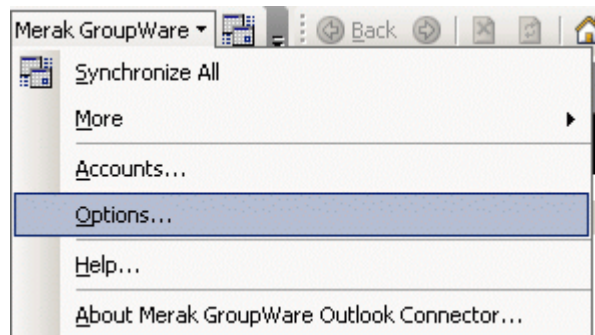
The Other tab options can be arranged into this tabular form:

Option	Description
Synchronize these Objects	Determines which objects are synchronized
Synchronize these Directions	Determines in which directions the Calendar/Address Book entries are synchronized when Synchronize All is used

## CHAPTER 4

# Outlook Connector Options

This section is dedicated to general Outlook Connector options. Read further if you want to change the global behavior of your Outlook Connector plug-in. To access these options please use the Merak GroupWare toolbar and choose options, just as on the picture below:



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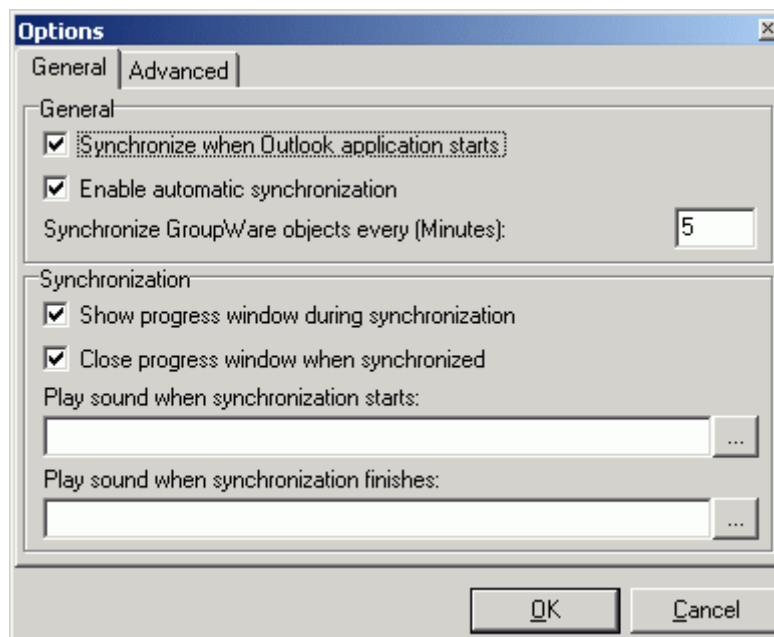
## General Tab

The General tab of Outlook Connector options gives you the possibility to change the synchronization behavior of the Connector. Here you can

- § enable/disable synchronization when Outlook application starts
- § enable/disable automatic scheduled synchronization and adapt the minutage
- § show/hide synchronization progress window during synchronization process
- § leave/close the progress window after the successful synchronization
- § play sounds (WAV files) during or after synchronization

The options are very easy to use and are mostly self-explanatory. We recommend you to leave the implicit default value, as it was set with maximum attention. You can move the progress window wherever arbitrary on you Outlook workspace to be not disturbed while the synchronization takes place.

This is the General tab interface:



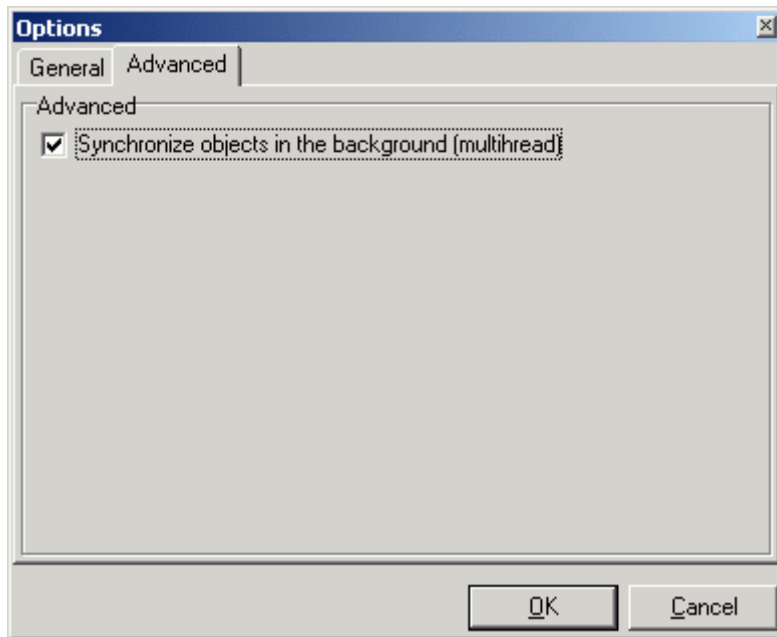


The options can be arranged into this tabular form:

Option	Description
Synchronize when Outlook starts and exits	The synchronization is automatically started when Outlook is opened/closed
Enable automatic synchronization	Allows user to set a period in which Outlook should synchronize automatically
Synchronize GroupWare accounts objects every:	Appropriate period for automatic synchronization in Minutes
Play sound when synchronization finishes	Allows user to load a wave file which is played when Outlook finishes the synchronization
Show progress window during synchronization	A small window indicating status during synchronization is shown
Close progress window when synchronized	The window which indicates current phase is closed after the synchronization is finished

## Advanced Tab

Advanced tab extends the Outlook Connector synchronization with multithread mode for background synchronization. The default value is enabled. If you do not experience any troubles with data synchronization, we recommend not switching the multithread mod off.



## CHAPTER 5

# Administration

This chapter is not for regular users of Outlook and Outlook Connector, but for groupware and Outlook Connector administrators. Here are several administration recommendations and hints described.

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## Global Calendar

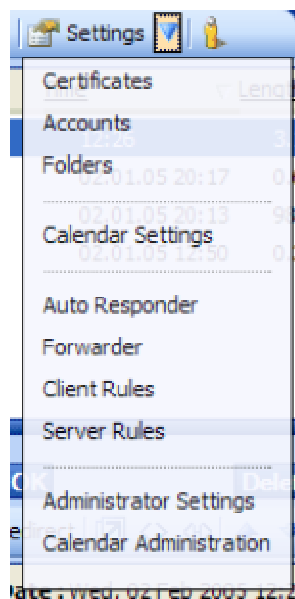
Global Calendar is an advanced way how to deploy groupware for corporate usage, where users want to share company global calendar and address book.

By default, a user who sets his/her account in Outlook Connector and synchronizes can see only his/her own Contacts but Contacts from the Global Address Book are not shown there. To show such Contacts in user's Outlook you have to populate some special account such as [global@yourdomain.com](mailto:global@yourdomain.com) with the Global Address Book and then the user has to set such account in Shared Accounts in Outlook to show the Contacts from the Global Address Book account.

To do that, follow the procedure:

### 1. Populate some special account with your Global Address Book

Create a new user account on your server (e.g. [global@merakdemo.com](mailto:global@merakdemo.com)). Go to WebMail logon as admin level account go to Settings - Administrator Settings.



There is an option Global groupware account. Fill in the address of created account.

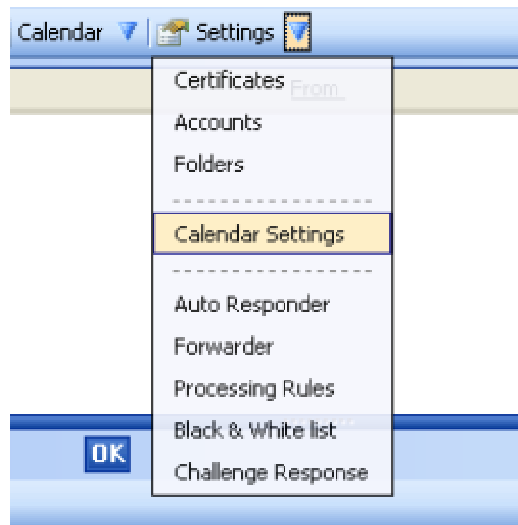
Store mail folders in Merak mail folder :	<input type="checkbox"/>
Global groupware account :	<input type="text" value="global@merakdemo.com"/>
<b>Logging</b>	
Logging :	<input type="checkbox"/>

After saving changes, any Contact you fill in as personal Contact in the [global@merakdemo.com](mailto:global@merakdemo.com) Address Book will be shown as a Contact in the Global Address Book for all other users.

Define the Contacts you want to have in your Global Address Book (if you already have the Contacts somewhere else use the Export/Import feature in the Address Book to move these Contacts).

## 2. Set the permissions (who can view/modify Global Address Book)

Logon WebMail as [global@merakdemo.com](mailto:global@merakdemo.com) account and go to Settings - Calendar Settings.



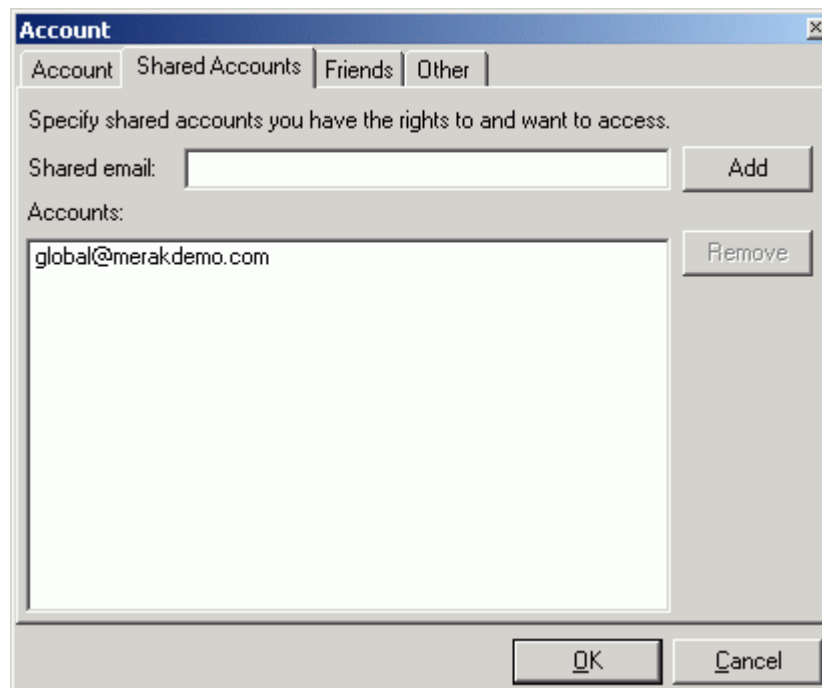
Set My Friends according to your wishes. The help regarding the permissions and My Friends is in the Merak GroupWare manual - Sharing Settings section.

### 3. Set such account in Outlook Connector

If an appropriate user has permissions to have the Global Address Book shown then he/she can set special personal folders in MS Outlook to see such Contacts.

To do that follow these steps:

- § Click on the **Merak GroupWare** button - Properties.
- § Choose account that has a permission to access Global Address Book and click on the **Change** button.
- § Click **Shared Accounts** tab
- § Add there an email address of Global Address Book account



Now a new personal folders will be shown in user's Outlook and after synchronization the Global Address Book will be shown in case the user has the permissions (see step 2 above).

You can even set different Global Address Book for each Virtual Host. To do that, just follow the same procedure with each virtual host separately. [Click here](#) to see more information about setting the Virtual Hosts.

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## Distribution List

One of interesting features of MS Outlook is Distribution List - a group of email address - which can be used in To: instead of listing all particular email addresses to send an email to all these addresses.

We implemented this feature to Outlook Connector too. It means that any Distribution List created in MS Outlook is created in Webmail as a Group immediately after the synchronization.

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