

Merak GroupWare Outlook Connector

8.3.14



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CHAPTER 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 Microsoft Outlook; Merak Mail Server administrators should read advanced GroupWare guide that is available on our website, also the last chapter "Administration" describes administrators parts.

Merak GroupWare Outlook Connection is very stable and reliable solution with lots of features, even though still simple to use and administer. The most valuable newly added features

- § Support for all items and entries in Outlook including attachments, folders, vCards, iCalendar, vFreeBusy, attendees, planning, etc.
- § Global accounts
- § User groups integration and domains integration
- § Groupware settings accessible from the account dialog
- § extended Sharing options
- § UTF8 support
- § Neat Graphics and user friendly interface

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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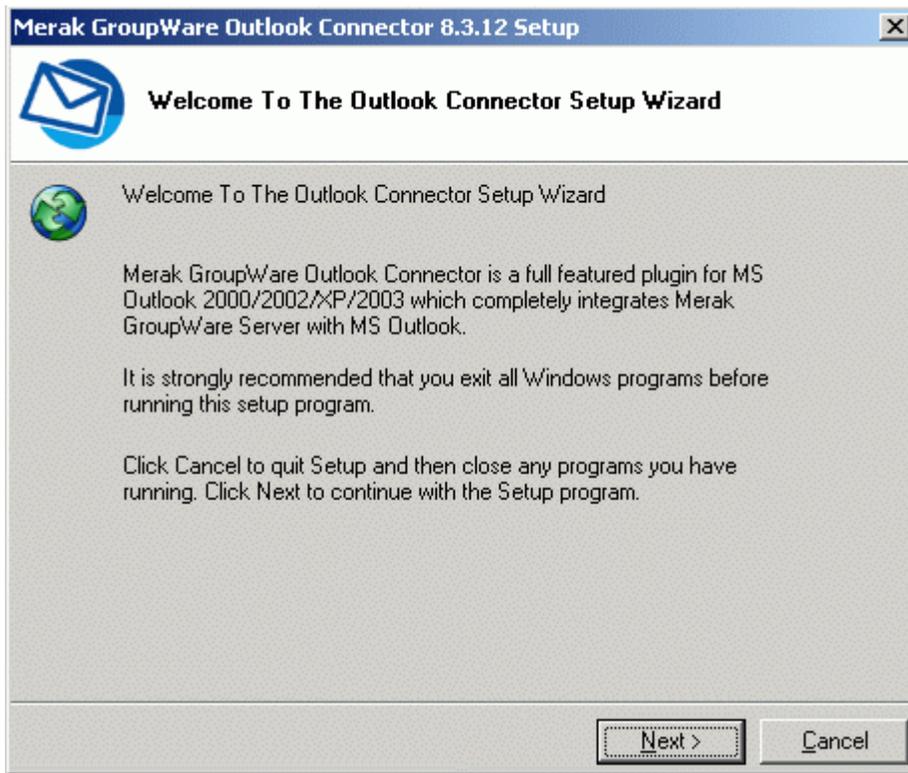
Installation

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. If you do not have enough rights to install software on your system, please contact your IT administrator or your company computer specialist.

The installation is easy, 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.

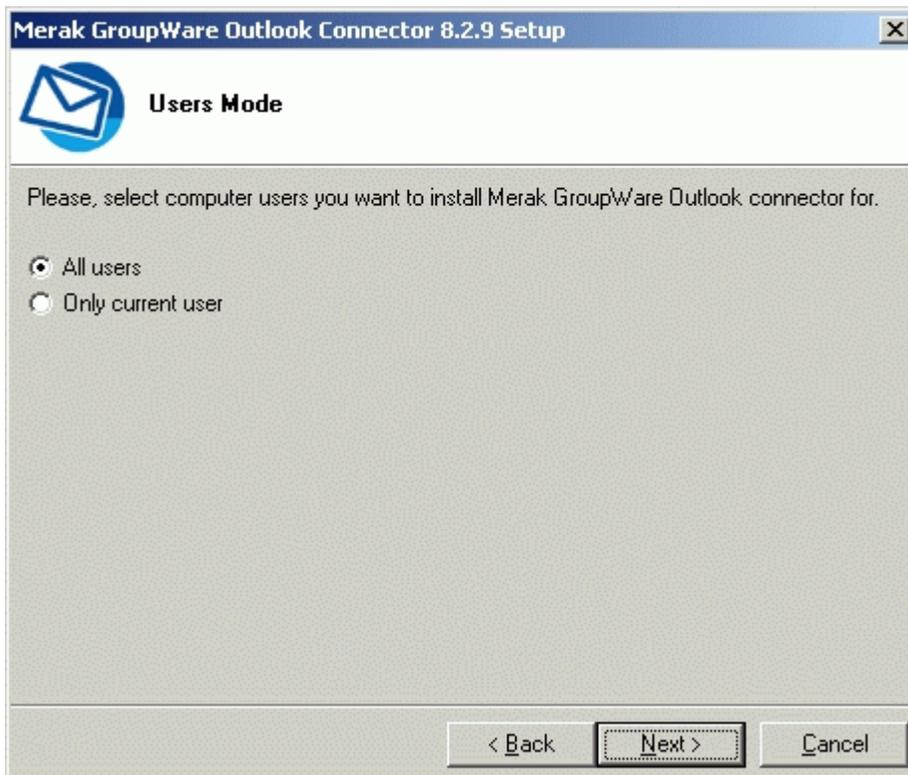
- 3 A screen like this will appear. Please read carefully all the displayed notes and obey them.



Click **Next** to proceed.

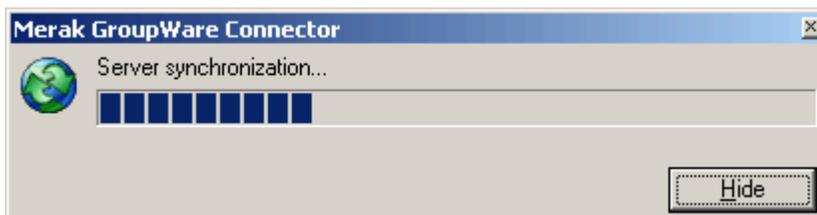
- 4 On the next screen of the setup wizard the License Agreement is displayed. Please read License Agreement carefully. If you agree with the License agreement, click **Next** to continue with installation of Merak GroupWare Outlook Connector. Otherwise, if you do not agree with it, choose "No" and the 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.



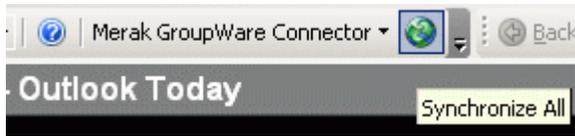
Choose one and click **Next** to continue with the installation.

- 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.



Proceed to next chapter describing Adding an Account with the Add Account Wizard.

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 really easy to use. Simply follow the onscreen instructions:

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

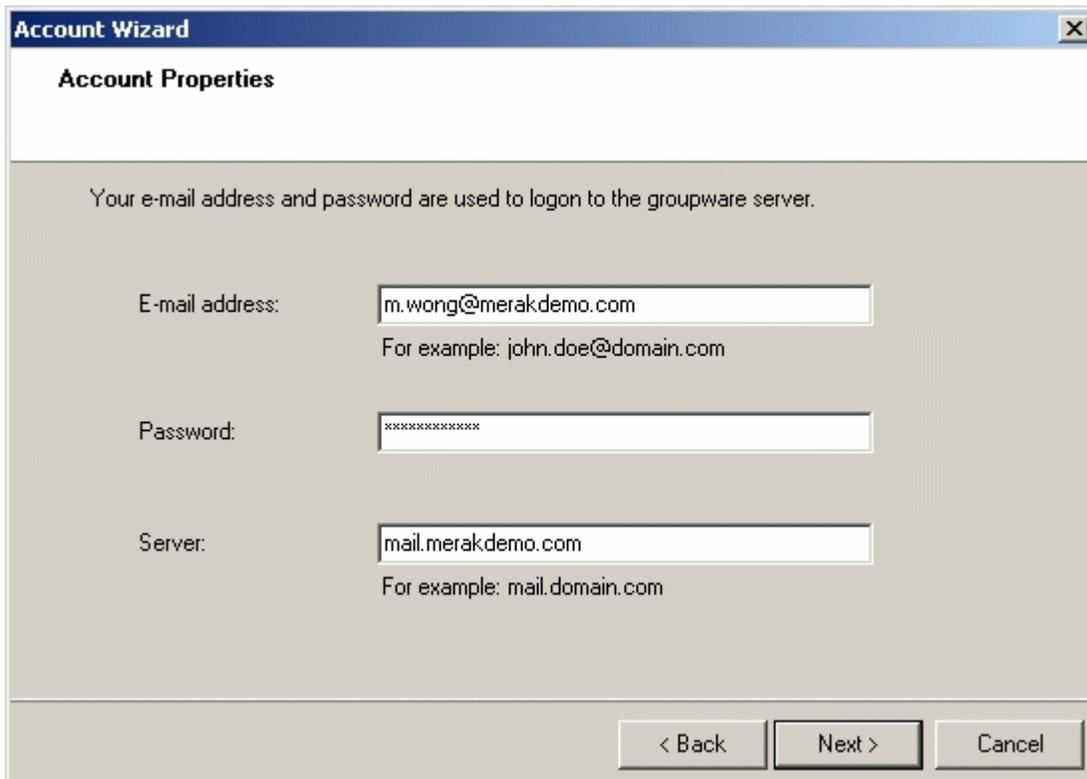


The screenshot shows a dialog box titled "Account Wizard" with a close button (X) in the top right corner. The main heading is "Your Name". Below this, the instruction reads: "Type your name as you would like it to appear in the accounts list and personal folder name." There is a text input field containing "Michael Wong". Below the field, it says "For example: John Doe". At the bottom, there are three buttons: "< Back", "Next >", and "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

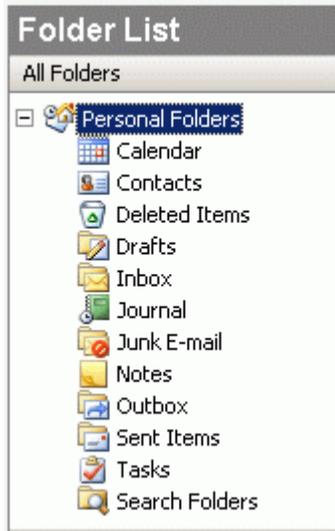
- § e-mail address
- § password
- § server



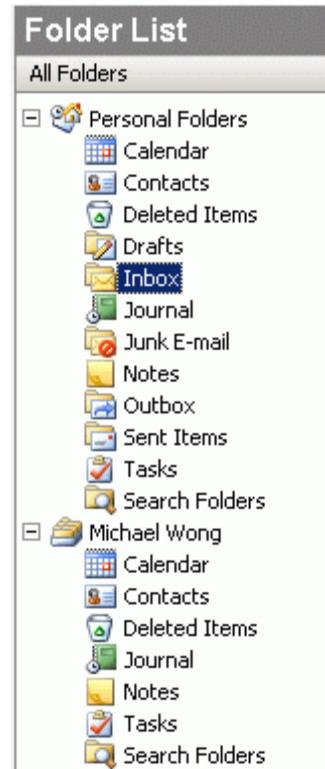
The screenshot shows a dialog box titled "Account Wizard" with a sub-header "Account Properties". Below the sub-header, there is a message: "Your e-mail address and password are used to logon to the groupware server." There are three input fields: "E-mail address:" with the value "m.wong@merakdemo.com" and a hint "For example: john.doe@domain.com"; "Password:" with a masked value "xxxxxxxxxxxx"; and "Server:" with the value "mail.merakdemo.com" and a hint "For example: mail.domain.com". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

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

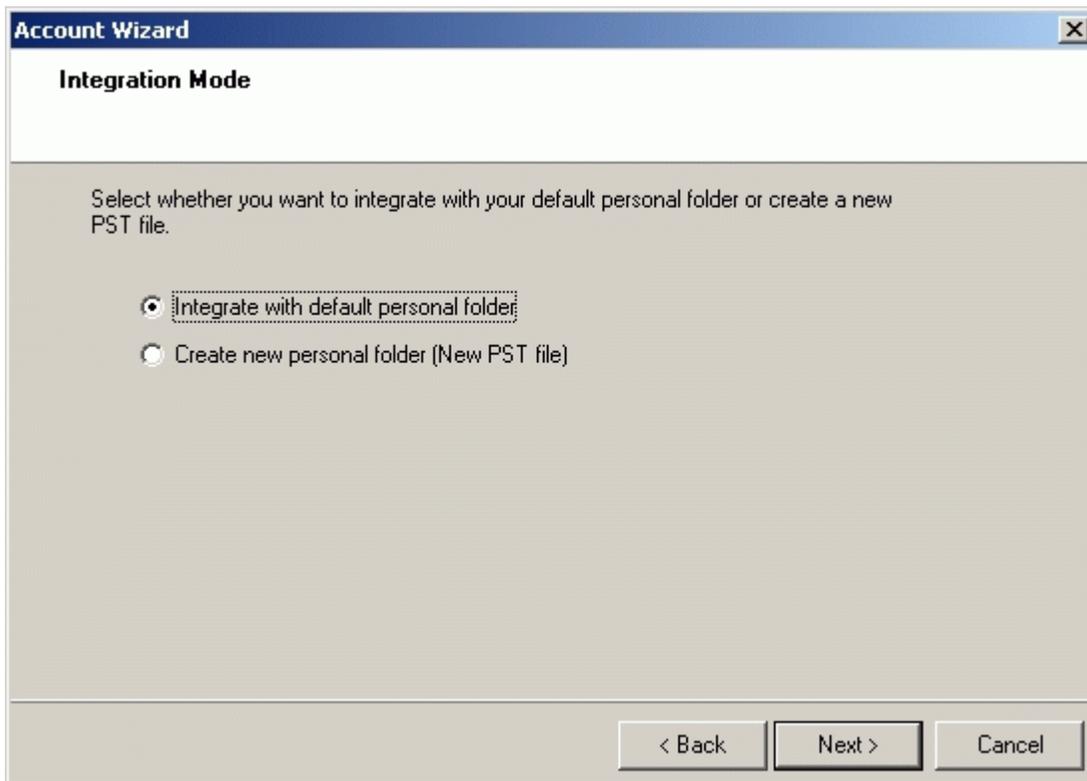
- 3 This screen lets you decide about the integration mode. The integration mode means the way how the account is settled in your MS Outlook. If you choose
 - § Integrate with default personal folder : the currently created account will be bound to the default MS Outlook personal folder. This setting 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

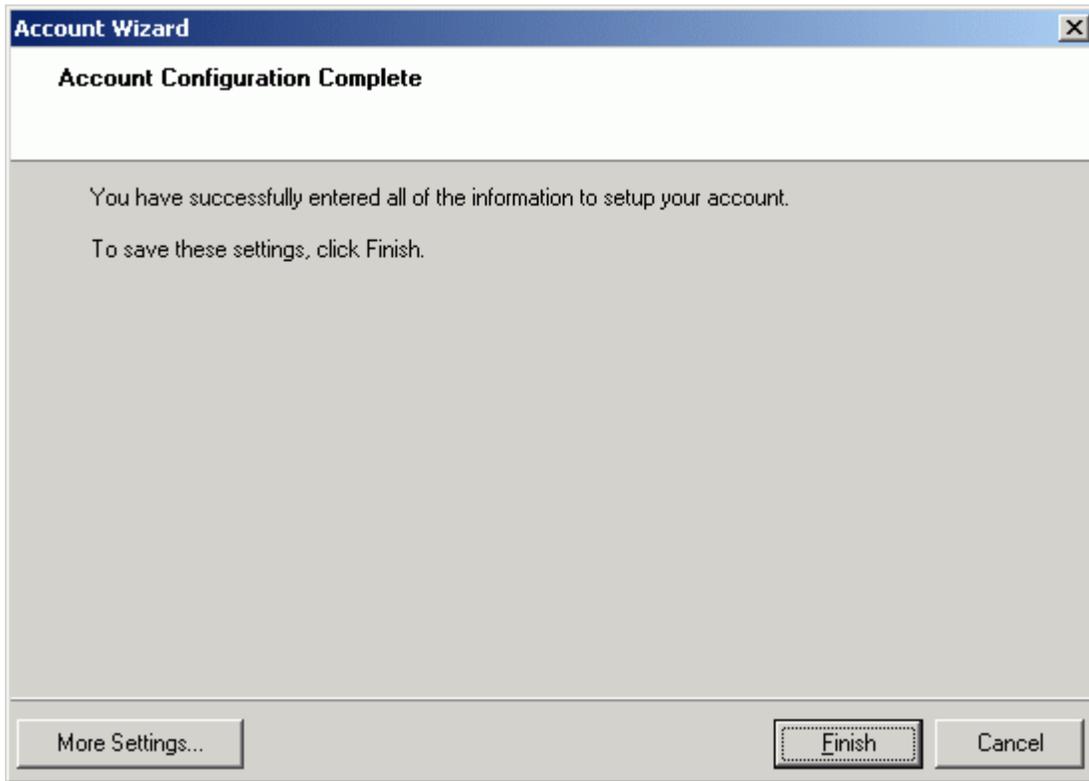


- § Create new personal folder: this setting is useful when you have two or more accounts or you would like to have special PST file for groupware. Use this setting for second and every next new account.



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.

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* (see "Accounts Configuration" on page 21) chapter for details)

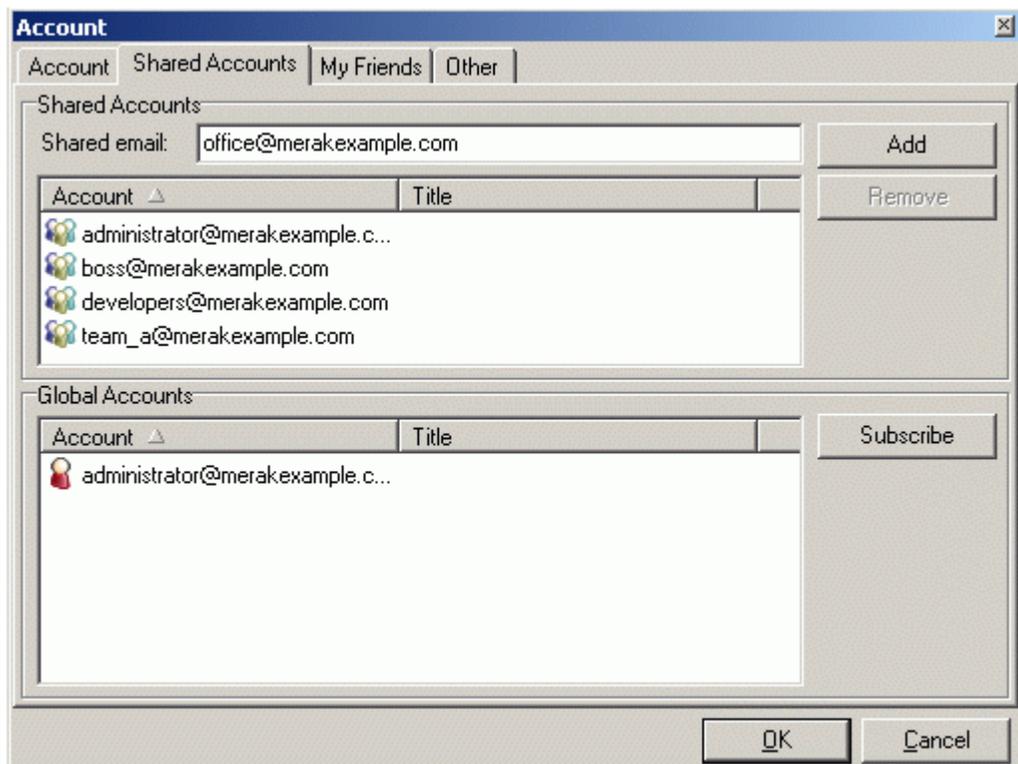
- if you entered the wizard as a part of first time installation, there is no More Settings button what so ever on the last wizards screen (MS Outlook have to be running to access "More Settings" section)

How to Show Shared Calendar/Contacts in Outlook

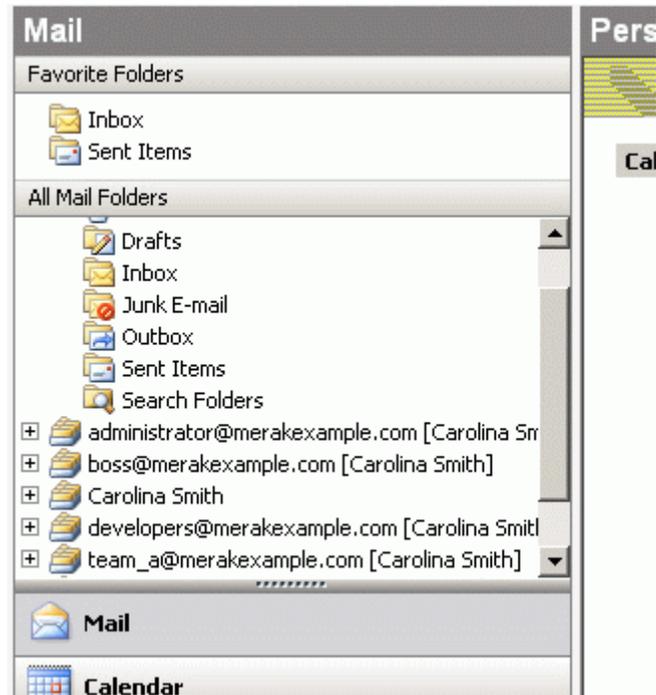
To add a shared calendar into the Outlook Connector use the current account you have already set for your own address. To do so

- 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 'Folder List' button in Outlook to access the complete folder list.

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

How to Allow Others to See My Calendar/Contacts

To share Calendar/Contacts, you have to set your Friends, a collection of accounts that have rights assigned for your calendar/contacts.

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.

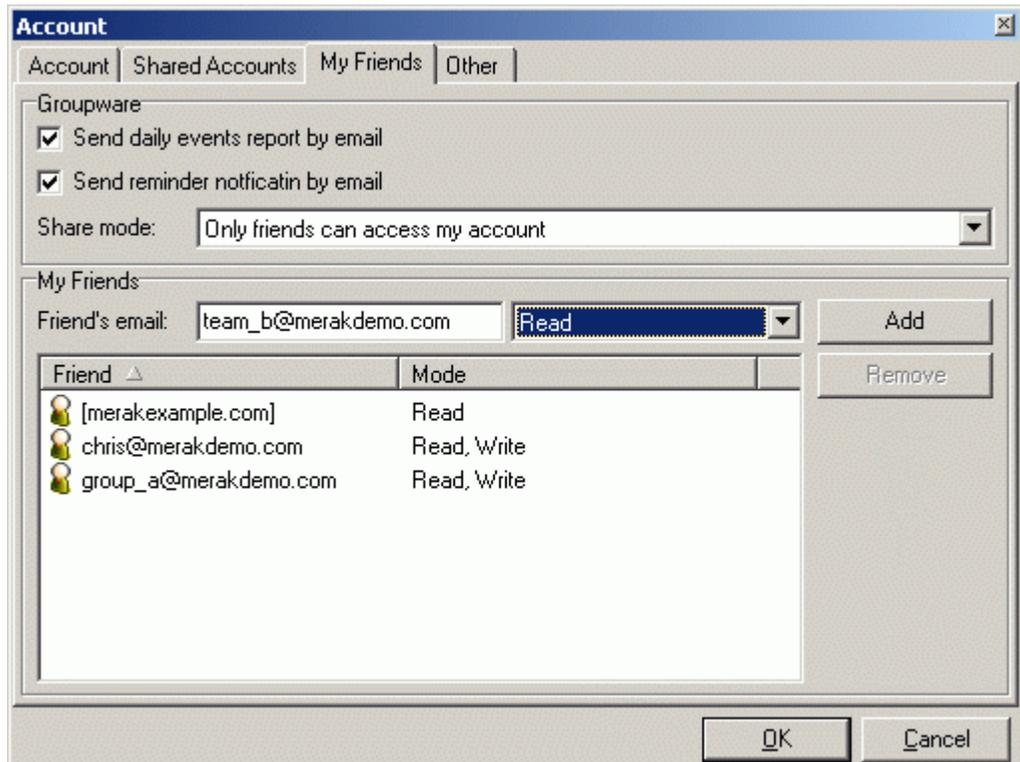
Setting the Friends

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 your account
- 3 click onto **My Friends tab**
- 4 enter the friend's email into the blank field, if you want to add a whole domain please enter the domain name in [] brackets, for example [yourdomain.com]
- 5 choose appropriate permissions from the combo menu, see below the description of permissions

6 click **Add**



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



Option	Description
Read	Public entries and Events with Shows As Busy Sharing
Read, Write	Read only Public entries and Events with Shows As Busy Sharing and to add a new entries; entries with Private Sharing are not shown.
Read, Write, Modify	View, add, modify Public entries and Events with Shows As Busy Sharing. Private entries are not shown.
Read, Write, Modify, Delete	View, add, modify, delete Public entries and Events with Shows As Busy Sharing. Private entries are not shown.
Owner	Full access (read, write, modify, delete) all entries including Private.

FreeBusy Feature for Advanced Appointment/Event Arrangement

Merak GroupWare offers full support for internet vFreeBusy standard, that is allowing you to see time periods when others are free or busy so that you can schedule meetings without conflicts. Microsoft Outlook (versions 2000,2003,XP) have support for retrieval of free/busy information from a user-specified location (an URL internet address) on your groupware server.

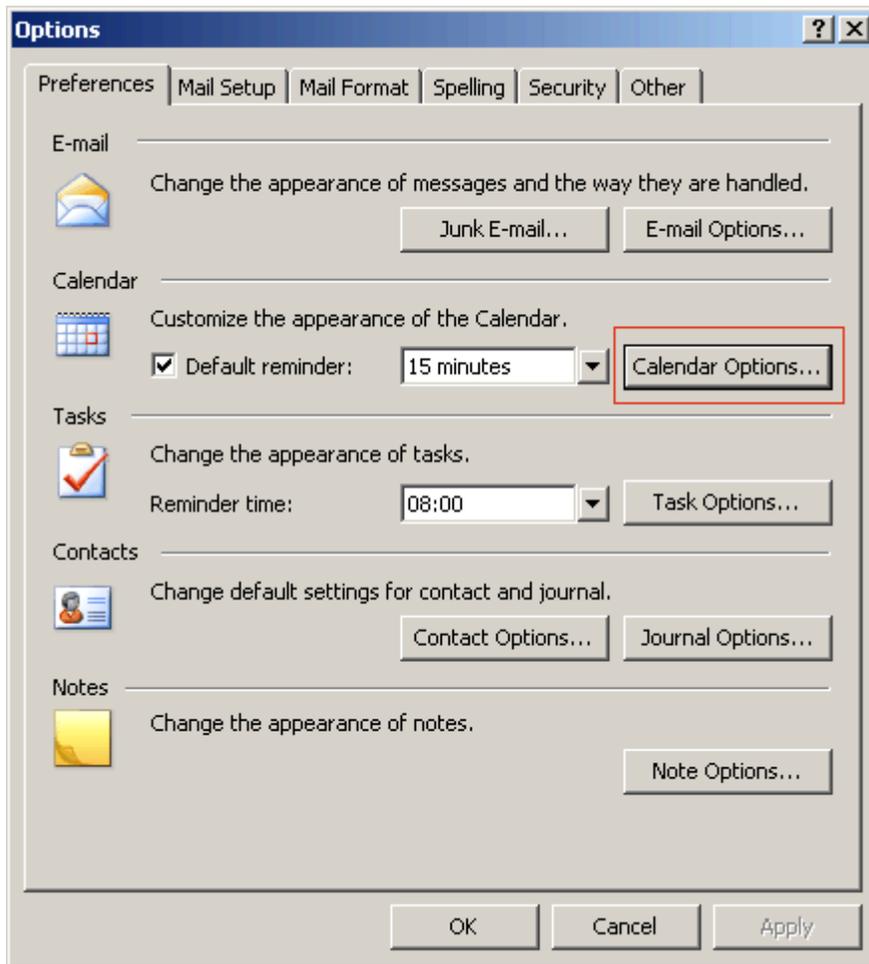
Publishing your FreeBusy Information

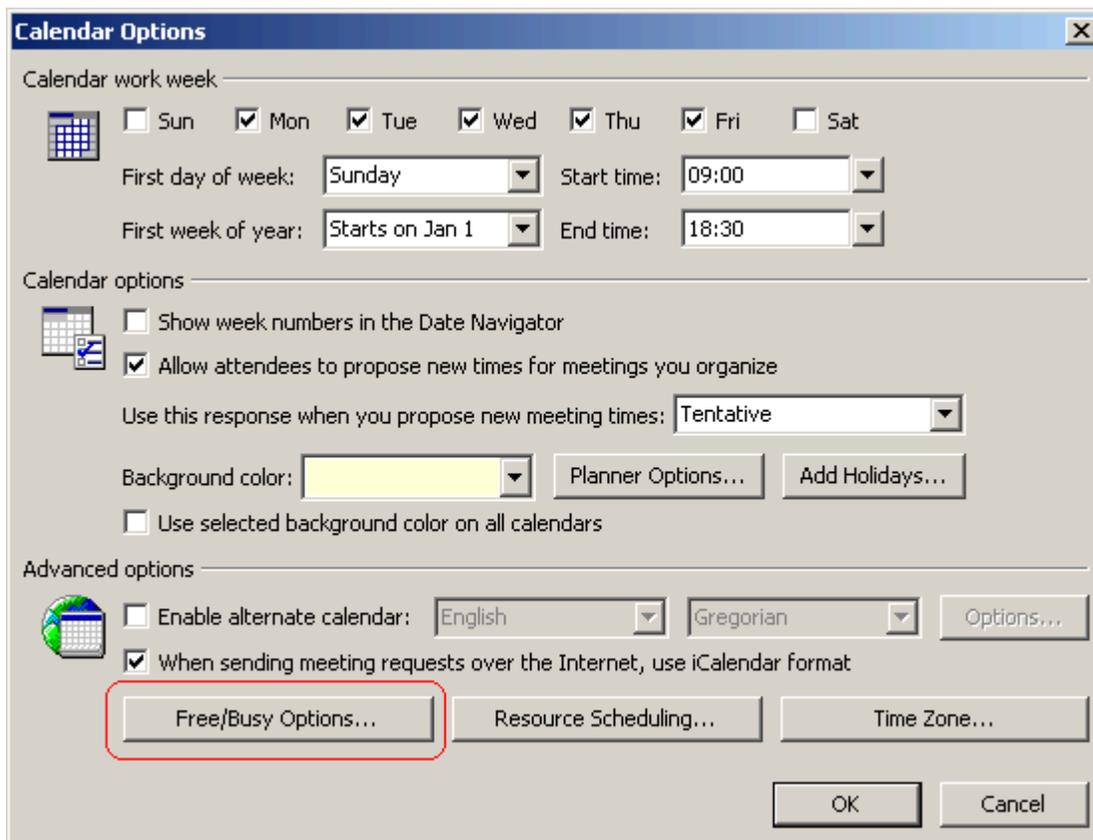
Your FreeBusy information is published automatically with your calendar and stored on the groupware server, so you do not have to enable it separately. You normally use your calendar for planning and the information about your free/busy time periods is automatically stored along with it.

Setting the FreeBusy Feature for Advanced Appointment/Event Arrangement

To be able to retrieve and view other people's free/busy information, first you have to enable the feature in Microsoft Outlook and fill in the correct location on the server.

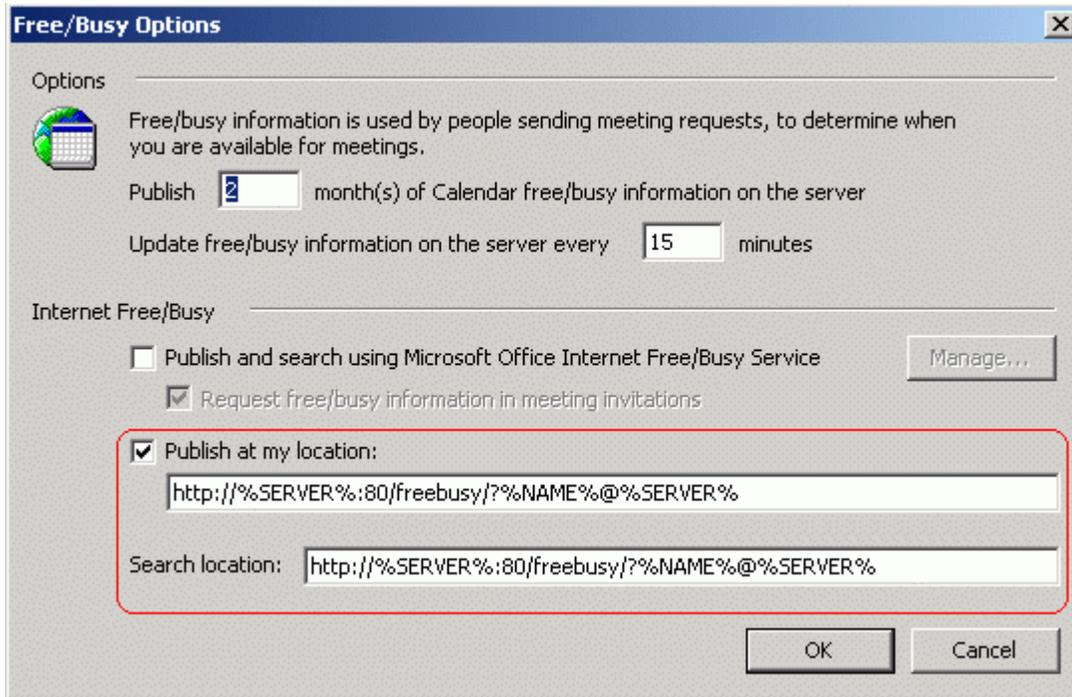
- 1 On the Tools menu, click Options and on the Preferences tab, click Calendar Options. See the screenshots below.





- 2 Click Free/Busy Options.

- 3 Leave the default setting (do not check any options in case you know what you are doing). Only tick Publish at my location and fill in the publish location and search location with string "http://%SERVER%:[port]/freebusy/?%NAME%@%SERVER%" (without the quotation marks). See the screenshot below.



- 4 By default setting, Outlook automatically publishes and retrieves free/busy information every 15 minutes. You can change this setting in order to get the retrieval more (or less) frequently. There is also a possibility to update the free/busy information immediately manually, simply click Send And Receive on the Tools menu, and then click Free/Busy Information.
- 5 Click OK three times to close all dialog boxes.

How to plan a meeting using FreeBusy

Return to the main screen in Outlook. For planning a meeting there is nothing really to set manually. Outlook autodetects the free-busy information for the people that you invite, and it automatically inserts their free/busy time periods in the planner.

- 1 Once in the main screen, click Calendar, and then click New Meeting Request on the Actions menu (or CTRL+SHIFT+Q)
- 2 On the second Scheduling tab, type the name of each attendee in the All Attendees box.
- 3 Outlook will retrieve the free-busy information and display it in the planner, so you see the time periods immediately.

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.

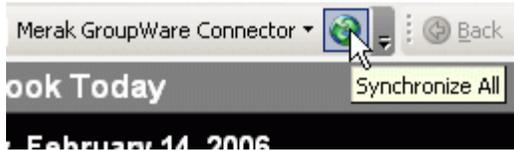
- § synchronization upon Outlook application startup
- § automatical scheduled synchronization after defined time period
- § manually hitting the synchronize all button

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 32)).

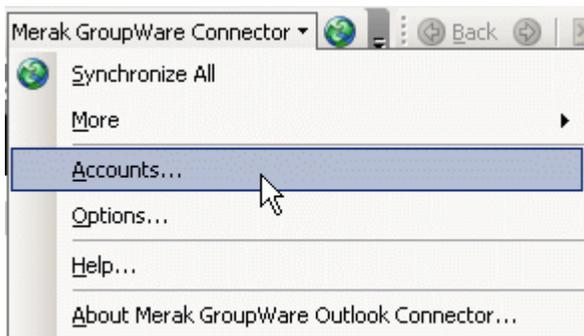


CHAPTER 3

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 user oriented 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 any 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 the 'Account' dialog box with the following details:

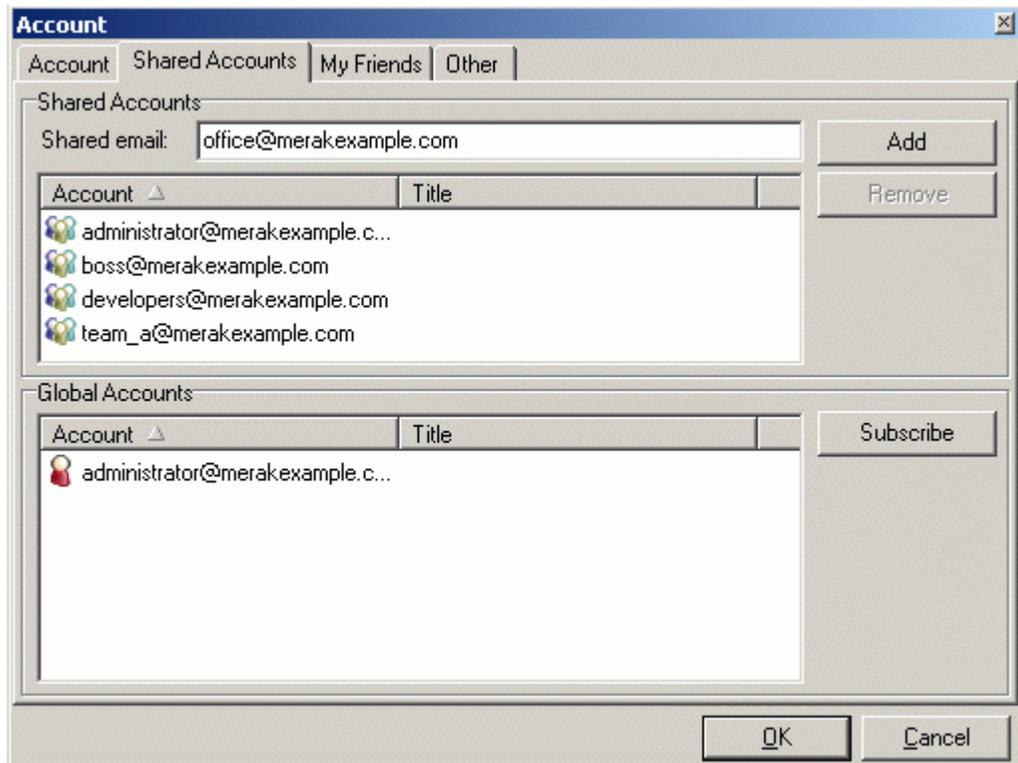
- Tab: Account
- Name: Carolina Smith
- Email address: administrator@merakexample.com
- Password: *****
- Server: mail.merakdemo.com
- Use SSL connection:
- Use plain text authentication:
- Integrate with default personal folder:
- Buttons: OK, Cancel

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.

Shared Accounts Tab

Shared Accounts tab serves as the place for adding shared calendars/contact that you have right and want to access. Here you can also subscribe for global accounts that were created by GroupWare administrator.

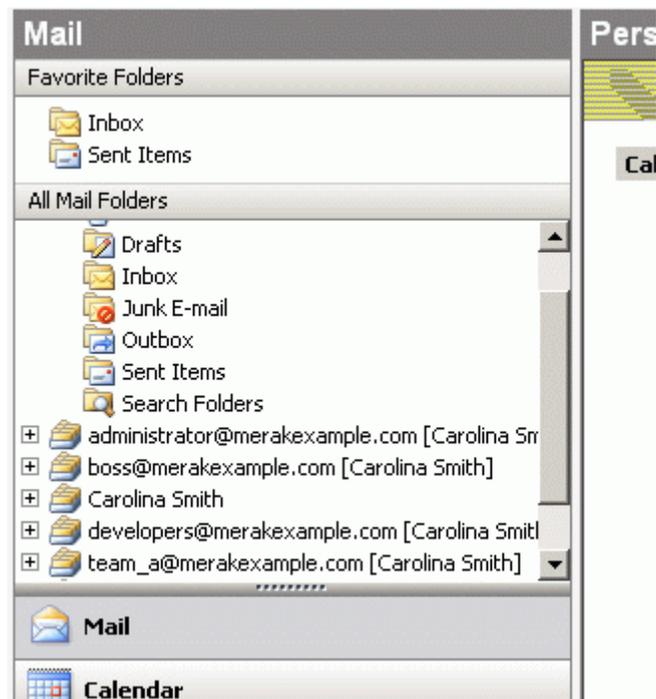
Shared Accounts



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.

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.



Global Account

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

To subscribe (sign up for sharing) choose the global account from the list and click **Subscribe**. The account name will copy itself into Shared Accounts section and a new Personal Folder appears in the Folder List for this Global Account.

My Friends Tab

Groupware

Groupware section of My Friends tab allows you to set sharing mode of your data and to set e-mail reports and notifications.

Send daily events report by email - check this option, in case you want to receive daily report with your events by email to your email address that is bound with your groupware account

Send reminder notification by email - this option is for those, who would like to receive reminder notifications by email. If you want to be notified about upcoming event by receiving a email to your email address, check this options checkbox.

Share Mode

Share mode allows you to control the sharing possibilities and sharing availability. There are three possible scenarios:

My Account is not shared with anybody - this is not a sharing mode, your account is private and no friends can be defined and no one will have the right to access your account shared data

Only friends can access my account - this is most common setting, where you define a collection of friends (accounts, groups of account, domains) that are eligible to access your shared data. The friends are defined in the My Friends section on this same tab. Read next sub section on how to add a friend.

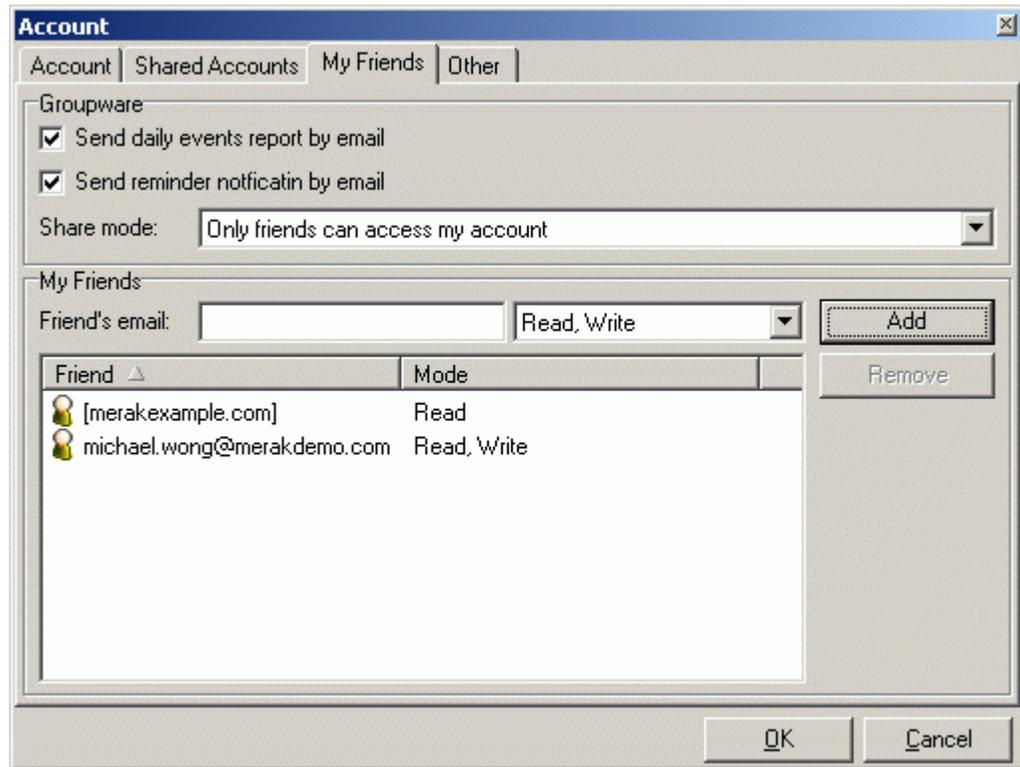
Anybody can access my account - this is anonymous sharing scenario, where your account is shared to anybody that wants to, use this setting only for public accounts that do not contain private data

My Friends

My Friends section 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.

You can also add a group of users or a domain as a friend. This scenario have multiple advantages. If you have group mail account in mail server, you can add this group as sharing friend and all accounts within the group will be set as your friends and will be eligible to share your data. The same applies for a whole domain. If you want to add all users of any domain, fill in the domain name with [] brackets. (for example [yourdomain.com])

To add a friend - the person/group of persons/domain 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 five types of permissions which may be assigned to the accounts.



Option	Description
Read	Public entries and Events with Shows As Busy Sharing
Read, Write	Read only Public entries and Events with Shows As Busy Sharing and to add a new entries; entries with Private Sharing are not shown.
Read, Write, Modify	View, add, modify Public entries and Events with Shows As Busy Sharing. Private entries are not shown.
Read, Write, Modify, Delete	View, add, modify, delete Public entries and Events with Shows As Busy Sharing. Private entries are not shown.
Owner	Full access (read, write, modify, delete) all entries including Private.

Other Tab

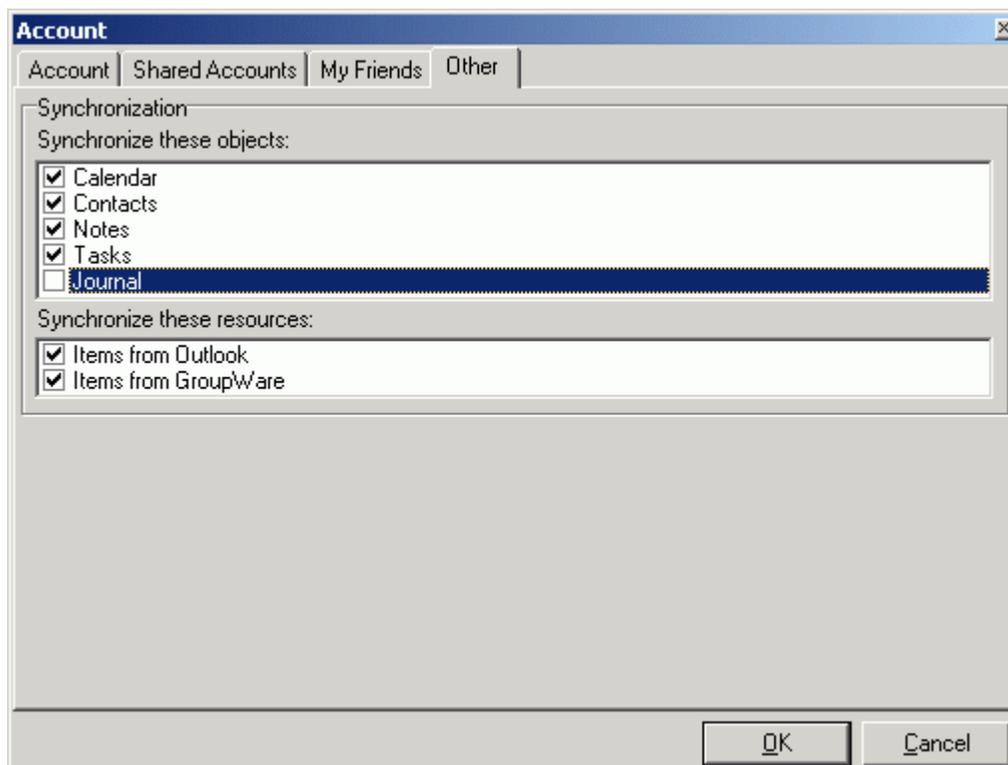
Other tab extends the possibility in meaning of restriction the objects that are synchronizable. In common usage you preferably leave the default settings.

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 (resources synchronization):

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

The Synchronize All option processes synchronization according to this configuration. Read here the chapter about *Synchronization* (on page 19).



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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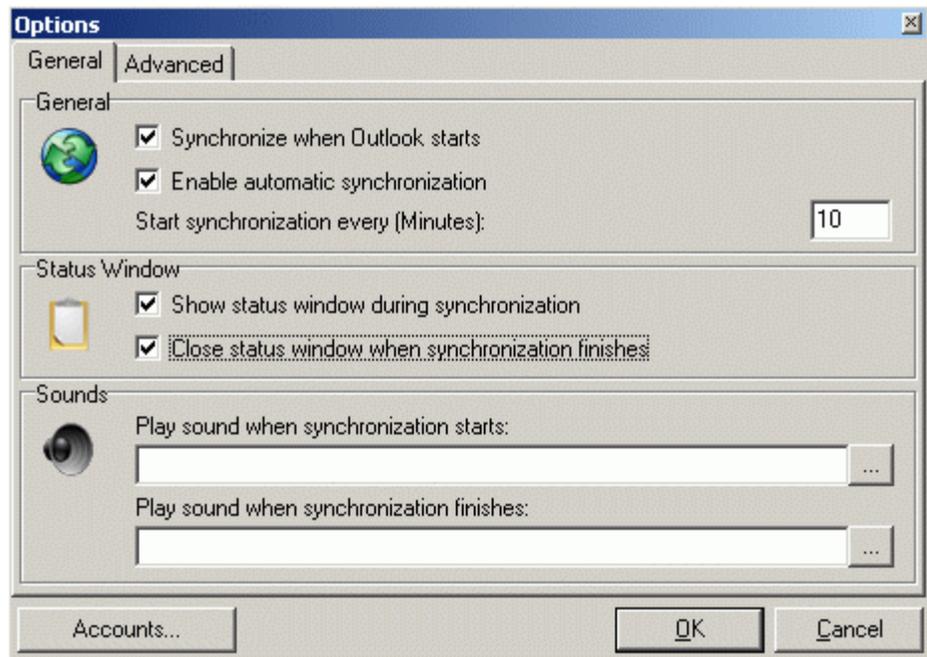
General Tab

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:

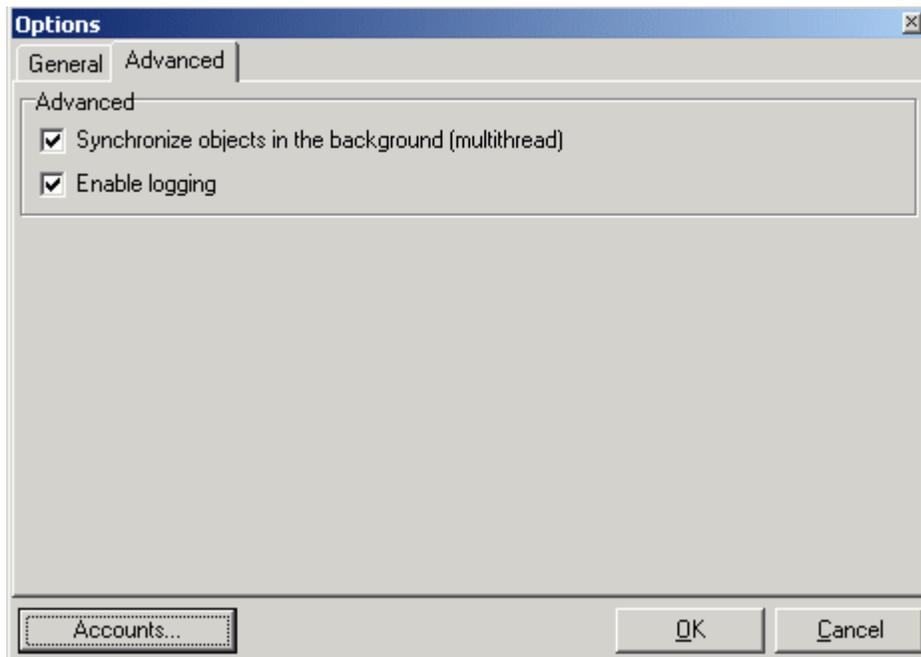
Option	Description
Synchronize when Outlook starts and exits	The synchronization is automatically started when Outlook is opened/closed
Enable automatic synchronization	Allows user to set a period in which Outlook should synchronize automatically
Synchronize GroupWare accounts objects every:	Appropriate 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

Clicking 'Accounts...' button will pop up the account management dialog, where you can add/edit account properties.

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.

Enable logging checkbox server as switch in logging mode. If checked all operations performed (ie. synchronization, etc.) will be logged in details into external text file.



Feedback

Thank you for using Merak GroupWare Outlook Connector.

We are always looking for ways on how to improve our services and our software. That is why, we welcome any feedback. If you have any comments or inquires about this guide or you want to share your Merak GroupWare operational strategies, please feel free to contact us by email at info@icewarp.com.

If you have problems with the software, please contact your local Merak GroupWare Support representative or use the Technical Support form at <http://www.icewarp.com/support/>.

Merak Mail and IceWarp Ltd. welcome your comments and suggestions on the quality and usefulness of this publication. Your comments and input are an important part of the information used for revision.

- § did you find any errors?
- § is the information clearly presented?
- § do you need more information? if so, where?
- § are examples correct? do you need more examples?
- § what features did you like most about this manual?

If you find any errors or have any other suggestions for improvement, please indicate the chapter, section, and page number (if available). You can send comments to us in the following ways:

- § mail to documentation@icewarp.com

If you would like a reply, please provide your name, address or SkypeID/ICQ/MSN numbers in your feedback.

Merak Technical Writer

Limassol, Cyprus

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