IceWarp Unified Communications

IceWarp Outlook Connector 4 User Guide

Version 10

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Contents

IceWarp Outlook Connector 4 1

Installing IceWarp Connector 2

Pre-Installation Checklist 2

Installation 3

Registering 10

Configuring Default Email Client 13

Creating New Profile 16

IceWarp Options 21

FreeBusy Appointment / Event Arrangement 24

Rules 27

Reporting Problems 36

CHAPTER 1

IceWarp Outlook Connector 4

The IceWarp Outlook Connector 4 allows you to synchronize information between your IceWarp Server account and Outlook.

- Small plug-in compatible with Microsoft (Office) Outlook versions XP, 2003 and 2007 (recent Service Pack required)
- Not compatible with Outlook Express
- Enables to synchronize Calendars, Contacts, Events, Notes, Tasks, Journals with the server and share them with other users
- Push capability for instant updates of new or changed items
- Supports **all** items and entries in Outlook including attachments, folders, vCards, iCalendar, vFreeBusy information, attendees, planning, etc.
- Unicode support for input in any language
- Simple, user friendly interface
- IceWarp Options for autoresponder, forwarder and rules
- Advanced access rights management
- Most of the features/functions of Outlook are supported (over 95%)
- Resource management, public folders sharing, public address books
- Appointments/tasks scheduling, voting, grouping, sharing
- Multiple accounts under one profile to access emails and shared resources
- Auto-subscription to all public and shared accounts

This manual describes how to install the Outlook Connector, register the product and quickly set up some of its features.

In This Chapter

Installing IceWarp Connector 2
Registering 10
Configuring Default Email Client 13
Creating New Profile 16
IceWarp Options 21
FreeBusy Appointment / Event Arrangement 24
Rules 27
Reporting Problems 36

CHAPTER 2

Installing IceWarp Connector

This chapter lists installation pre-requisites and details step-by-step installation procedure.

In This Chapter

Pre-Installation Checklist 2
Installation 3

Pre-Installation Checklist

- Microsoft Outlook must be installed on the machine where you want to install IceWarp Connector, but it should not be running.

  NOTE that there are times when Outlook appears not to be running but it actually is. You can check by look for OUTLOOK.EXE in the Windows Task Manager. If it is listed, shut it down (End Task) before you begin.

- You should be reasonably confident in using the Office Outlook.
- You should have your account name, password, and server name (hostname) at hand - you will need these to configure your account.
- You need to know whether you want to integrate your account into your default Personal Folder or have a new Personal Folder created.
- You should have downloaded the latest version of the IceWarp Connector from the IceWarp ***website*** http://www.icewarp.com or from your local provider of IceWarp Server (e.g. http://mydomain.com/install/) or from the WebClient interface in the **Tools – Licenses menu – Download** tab.
- You need ***Activation Key*** for its registration, e-mailed from your administrator or available from the WebClient interface in toolbar: **Tools - Licenses - Outlook Connector** tab.
- You may be required to insert your original Outlook installation media. Make sure that you have your original Outlook installation media available before you intend to change your Outlook configuration.
- Make sure that Outlook is setup as the default e-mail client.

  To verify this on Windows 7 or Vista, see the **Default E-mail Client in Windows 7 or Vista** (see "Configuring Default Email Client" on page 13) chapter.

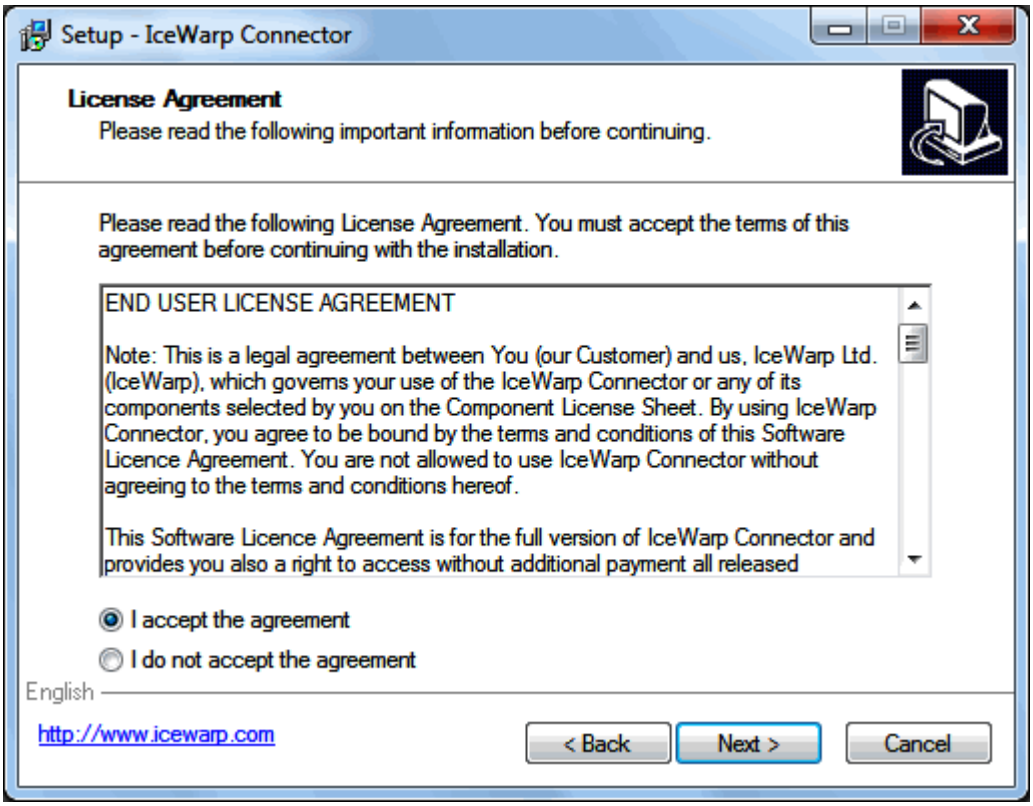
  To verify this on other Windows versions, go to **Control Panel – Internet Options – Programs** and make sure that Outlook is selected in the drop down box.

- Outlook Connector will only install on systems where the user has administrative rights. The user's rights can be changed to install the Outlook Connector and then reset to the original rights.

Installation

Once having the latest **IceWarp Connector Installer** file **(connector-setup.exe)** downloaded, follow these steps:

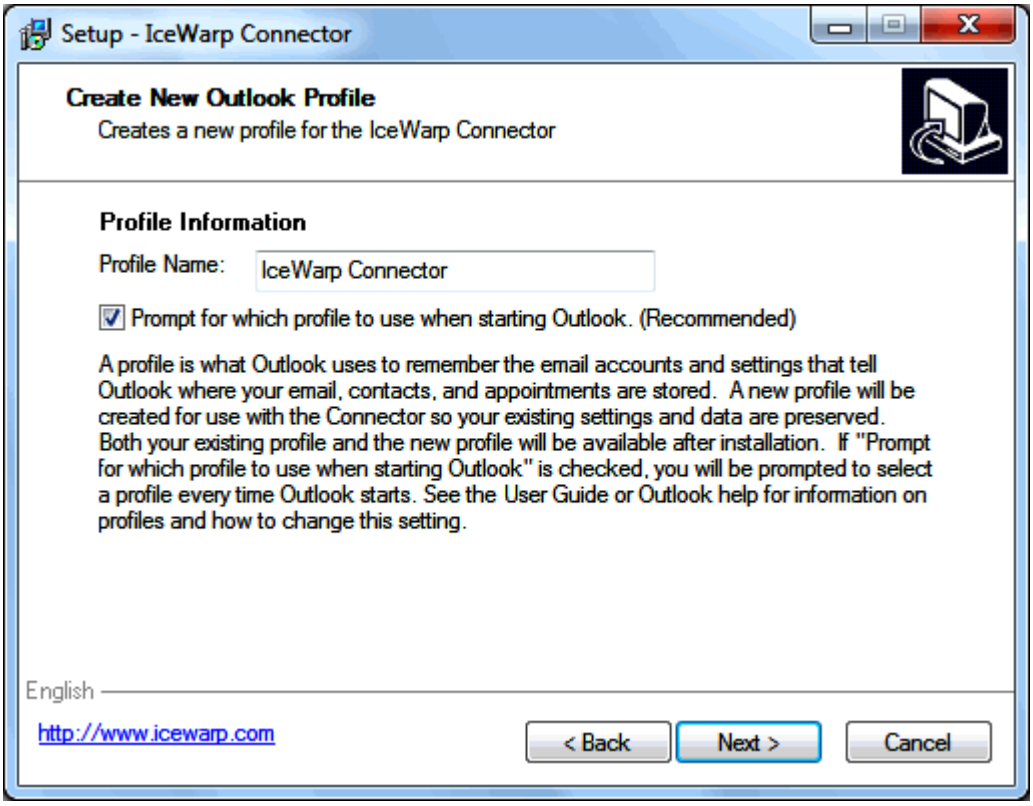
1. Double-click the file to run installation.
2. In the **Welcome** dialog, click ***Next***.
3. In the **License Agreement** dialog, read the License Agreement, select the ***I accept the agreement*** option and click ***Next***.



4. Create New Outlook Profile

   IceWarp Connector will automatically create a profile for Outlook. The default ***Profile Name*** for this profile is IceWarp Connector. This “default name” is a user defined field and may be changed if desired.

Check the ***Prompt for which profile to use when starting Outlook (Recommended)*** box, if you have multiple profiles in Outlook. Selecting this will prompt for profile selection when Outlook starts.



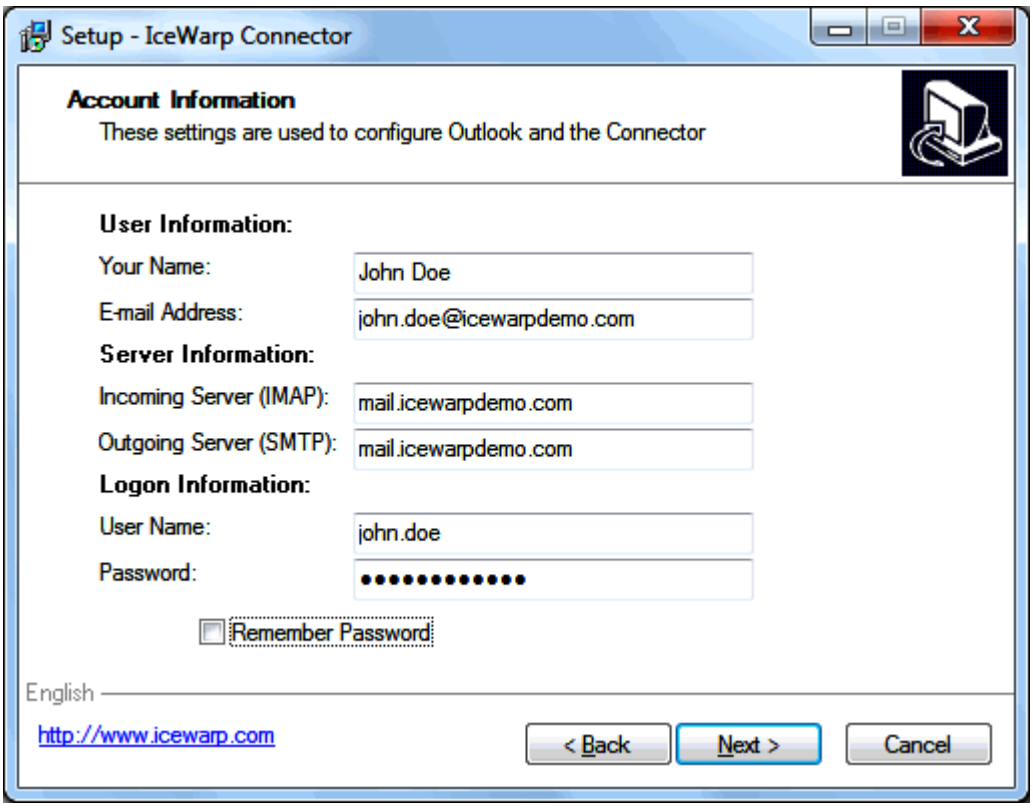
Please refer to the **New Profile Creation** (see "Creating New Profile" on page 16) chapter for details on creating/modifying an Outlook profile before/after the installation of Outlook Connector.

5. Account Information

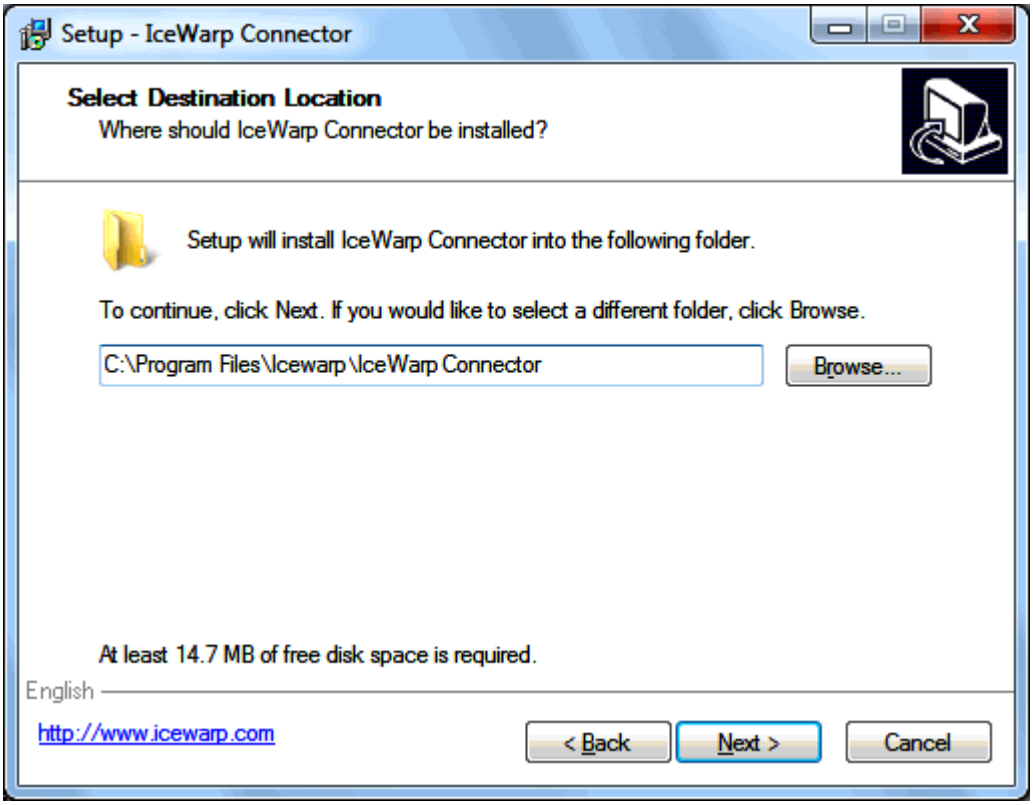
This screen provides the IceWarp Connector with the information needed to create the Outlook profile and email account during the installation process.
The following basic information is needed to complete this screen:

- Your Name
- E-mail Address
- IMAP Server Address
- SMTP Server Address
- Username

- Password

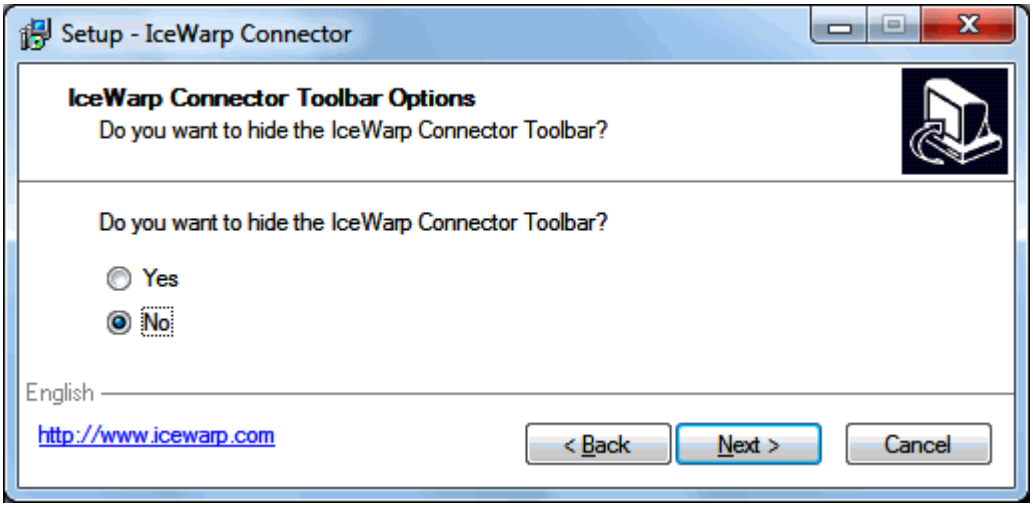

Setup - IceWarp Connector
Account Information
These settings are used to configure Outlook and the Connector
User Information:
Your Name:
John Doe
E-mail Address:
john.doe@icewarpdemo.com
Server Information:
Incoming Server (IMAP):
mail.icewarpdemo.com
Outgoing Server (SMTP):
mail.icewarpdemo.com
Logon Information:
User Name:
john.doe
Password:
Remember Password
English
http://www.icewarp.com
< Back
Next >
Cancel

6. In the **Select Destination Location** dialog, if you want to change the installation folder, select it using the ***Browse*** button. After selection or if you do not want to change the suggested location, click ***Next***.

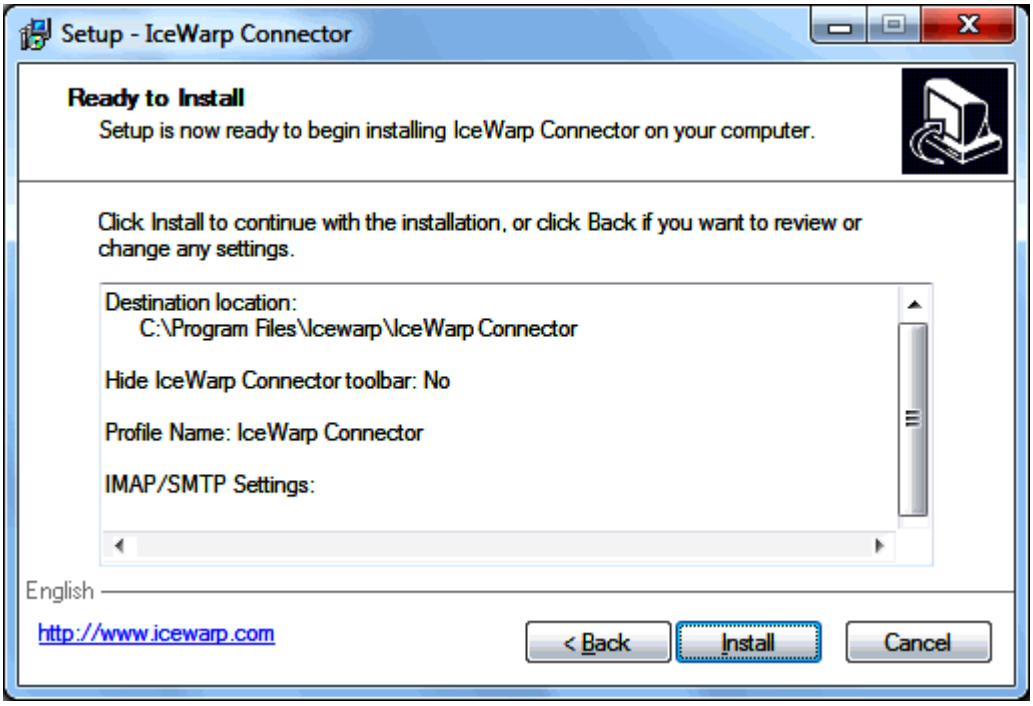


7. In the **IceWarp Connector Toolbar Options** dialog, select whether you want to have the Connector toolbar in MS Outlook hidden or not. (***No*** is recommended.)

   Click ***Next***.



8. In the **Ready to Install** dialog, resume settings and click the ***Install*** button to finish installation.



9. Copy Outlook Data (optional)

   This feature allows users to export their mail, calendar, contacts, tasks and notes from an existing PST file or profile to their IMAP server.

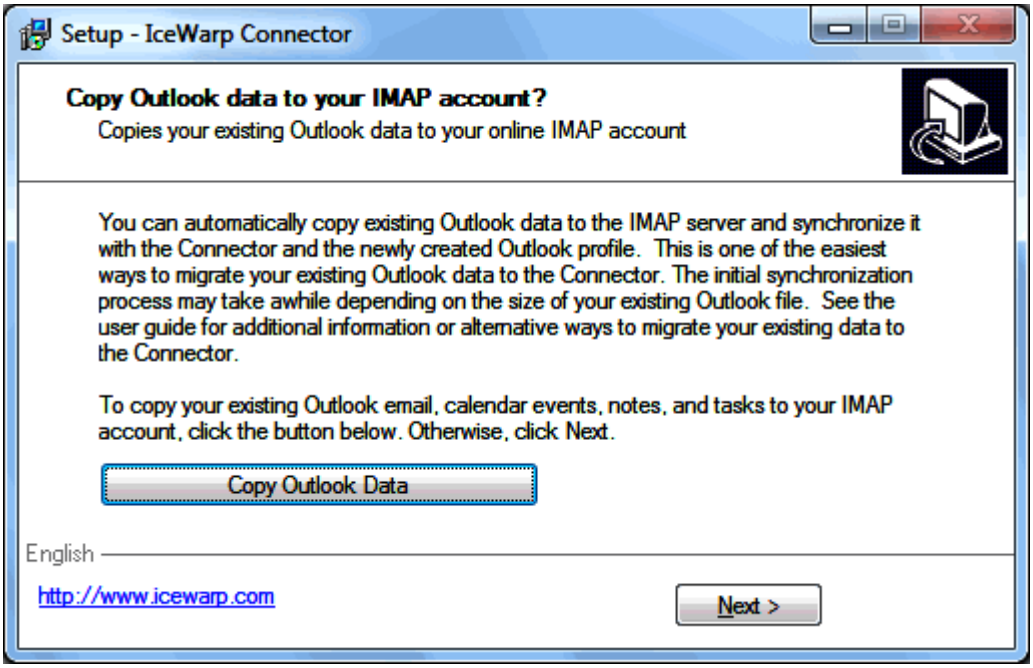
   - Export from profile:

   This option searches for an existing PST file to export the data from.

   - Export from PST file:

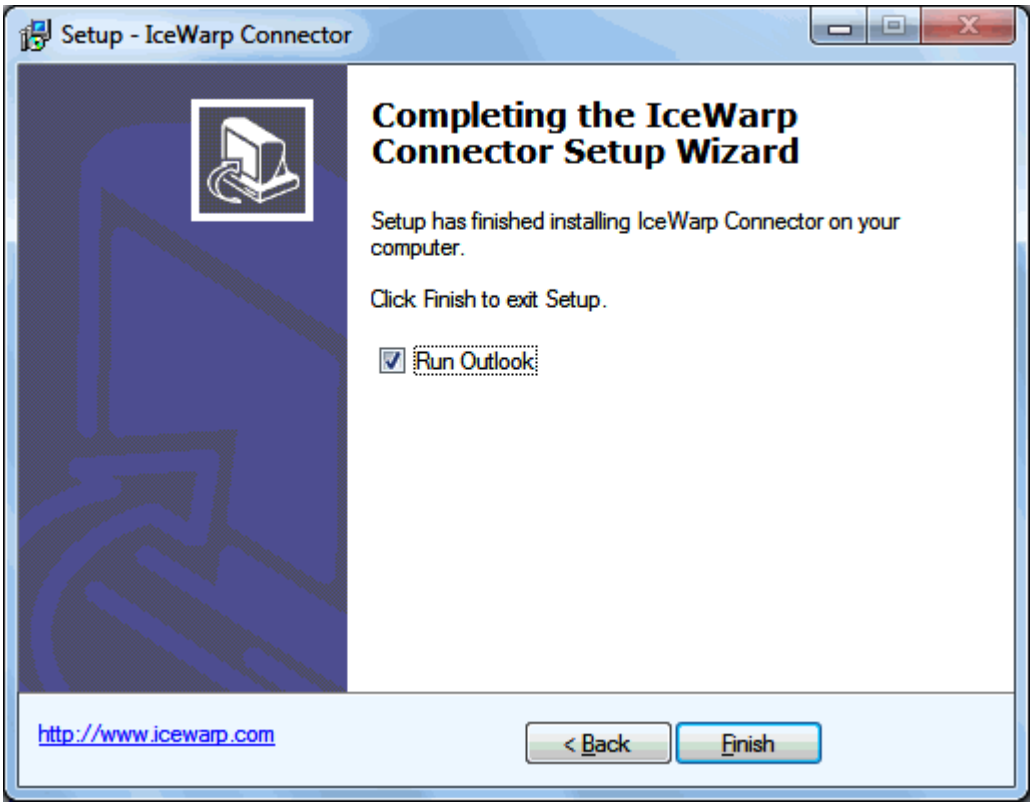
   This option allows the user to select the PST file to be exported.

All of the necessary account information is automatically inputted into the appropriate fields for exporting the PST data to the new IMAP account on the server.



10. Setup Complete

To start Outlook, place a check in the box labeled ***Run Outlook*** and select ***Finish***.



CHAPTER 3

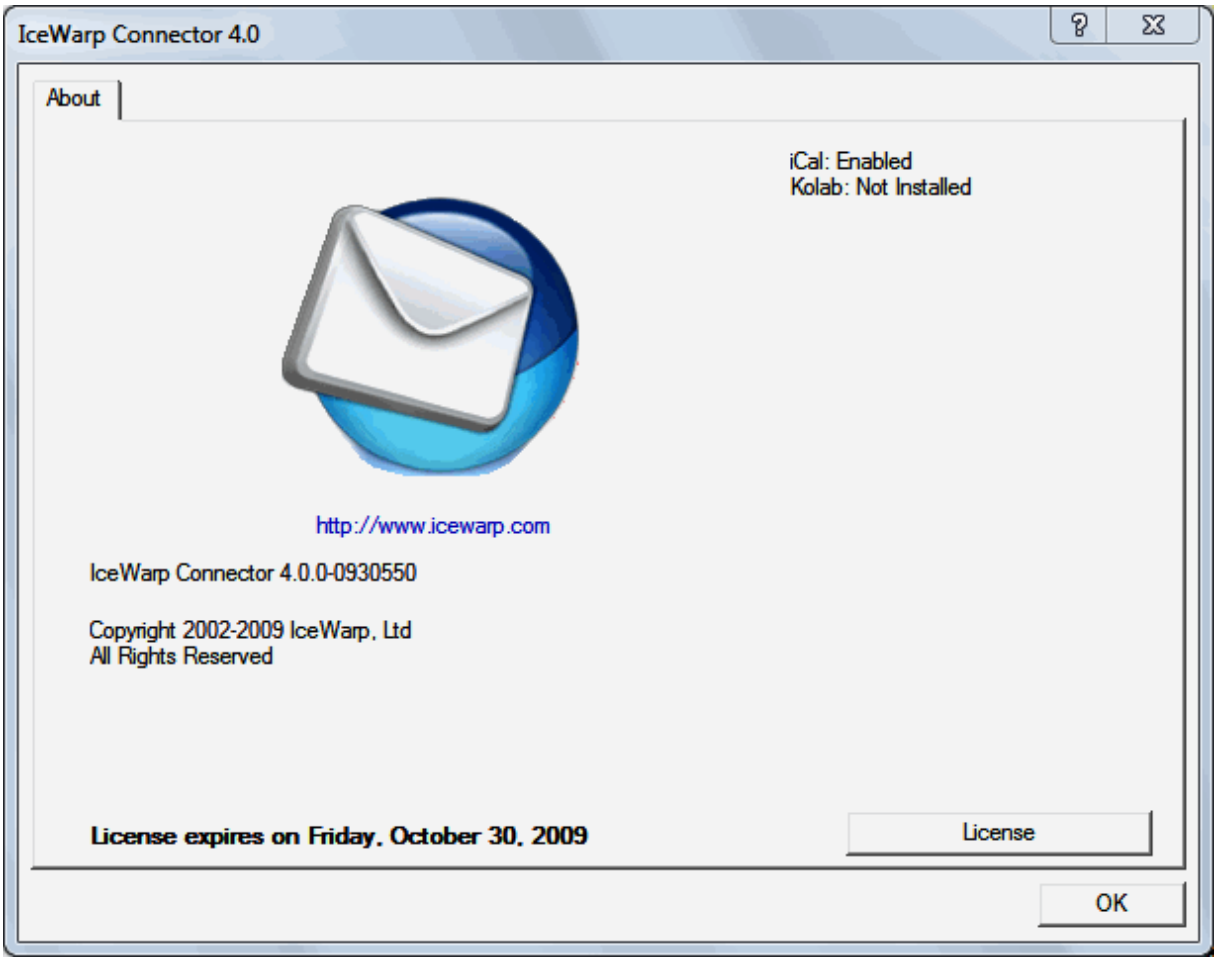
Registering

After installation, IceWarp Outlook Connector works in 30 day evaluation version and will stop working if not registered before the evaluation period expires.

1. Check the existing license:

   Your administrator could have enabled automatic license registration which takes place transparently during the setup.

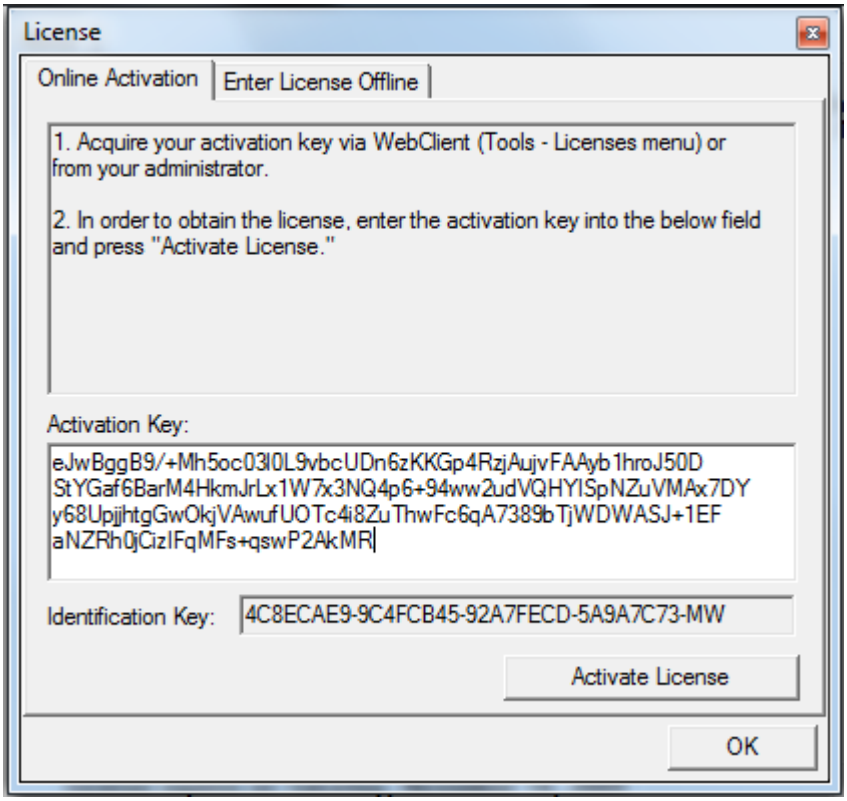
   - To check if you need to register your copy, click the **About** button in the Outlook Connector toolbar.
   - If it says "License expires" on some date in near future, you need to register your copy.



2. To register the Outlook Connector on-line, you will need an ***Activation Key***.

Activation Key can be emailed to you by server administrator. You can also find the ***Activation Key*** in WebClient interface, in menu **Tools - Licenses - Outlook Connector**. If you have not received it or it doesn't show in WebClient, contact your IT staff.

- In Outlook, click **About** button in the toolbar, click the **License** button in the bottom of the window, then stay on the **Online Activation** tab.



- Copy and paste the ***Activation Key*** previously obtained from your administrator to the dialog. You can also find the ***Activation Key*** in WebClient interface, in menu **Tools - Licenses - Outlook Connector**.
- Click the **Activate License** button. The button will only be active if you enter correctly formatted ***Activation Key***.
- You should be informed that registration has been successful, or that there has been an error.

3. License registration may fail for the following reasons:
   - The ***Activation Key*** is expired- you will need a new one and repeat the registration.
   - The computer is blocked from accessing the Internet or access to the licensing server is temporarily unavailable.
   - The number of client licenses has been exceeded for your organization. IceWarp licensing servers track how many systems have been activated using a given license. If the number of activated clients exceeds the total for the license, Outlook Connector will inform you that additional licenses need to be purchased.
   - If you need to re-install Outlook Connector software on a new system due to either hardware failure or system upgrade, contact your support staff to assist you with removing the existing Outlook Connector registration, or request a new ***Activation Key***.

4. To register Outlook Connector off-line, you will need to obtain ***license.xml file*** from IceWarp website.

   If the on-line activation fails because your computer cannot access the license server, you can still register the product using a ***license,xml file,*** which will be provided to you in exchange for ***Activation Key*** and ***Identification Key***.

   - Open this link in your browser by double-clicking it: ***http://shop.icewarp.com/***
   - From the left-hand menu, select **Client Activation.**
   - Copy the ***Activation Key*** into the field where indicated.
   - Switch to Outlook, click the **License** button in the **About** window.
   - Copy the ***Identification Key*** to the clipboard (using Ctrl+A, Ctrl+C or double-click it, right-click the selection and select Copy).
   - Switch to your browser and paste the ***Identification Key*** where indicated and click **OK.**
   - Download the ***license.xml*** file from the web page to your computer.
   - In Outlook, **About** - **License** dialog, change to the **Enter License Offline** tab.
   - Click the **Enter License File..** button.
   - Browse for the ***license.xml*** file, double-click it or click **Open.**
   - You should be informed that the registration was successful.

5. If you are unable to register the Outlook Connector, please contact your support helpdesk or IT administrator.

CHAPTER 4

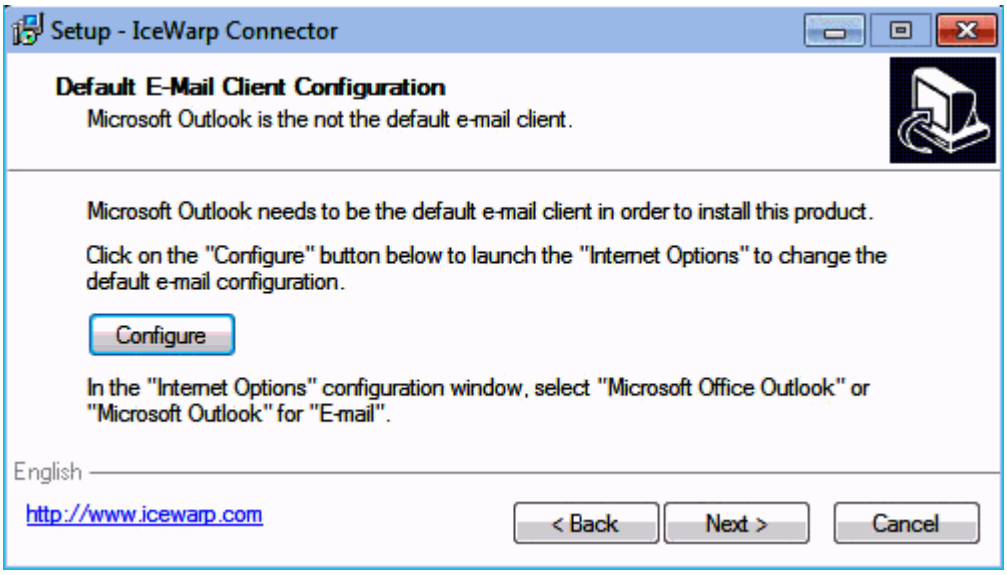
Configuring Default Email Client

For Windows 7 or Windows Vista, it is necessary to set Outlook as the default email client (if not already set).

To configure it, do the following:

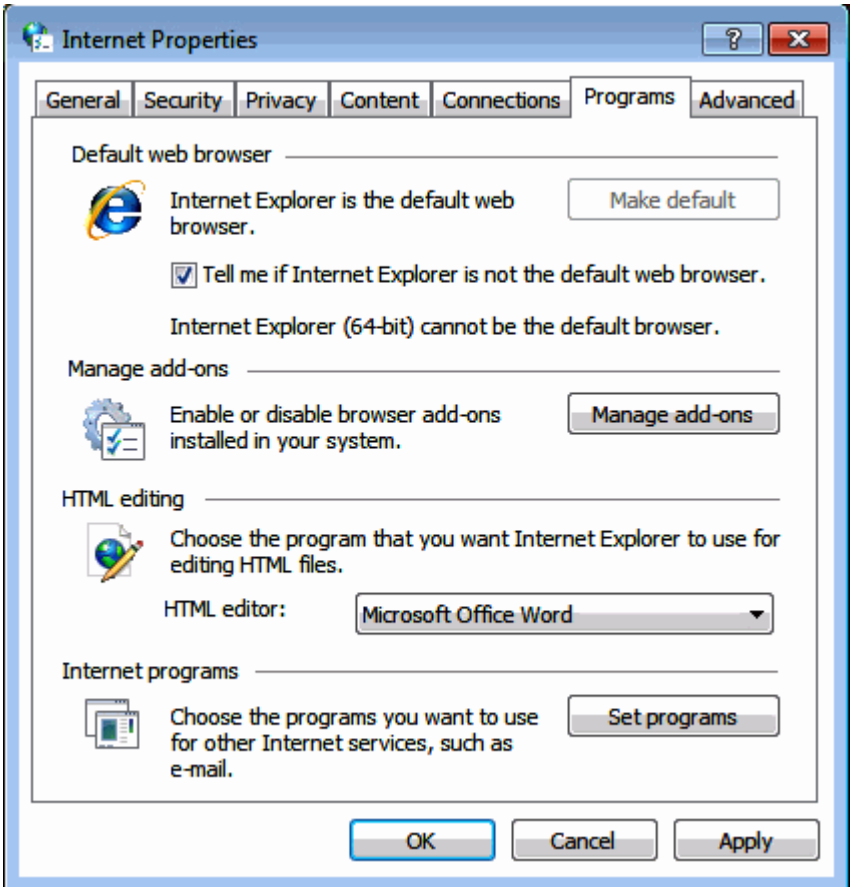
1. During IceWarp Connector installation, the **Default E-mail Client Configuration** dialog is shown.

   Click the ***Configure*** button.

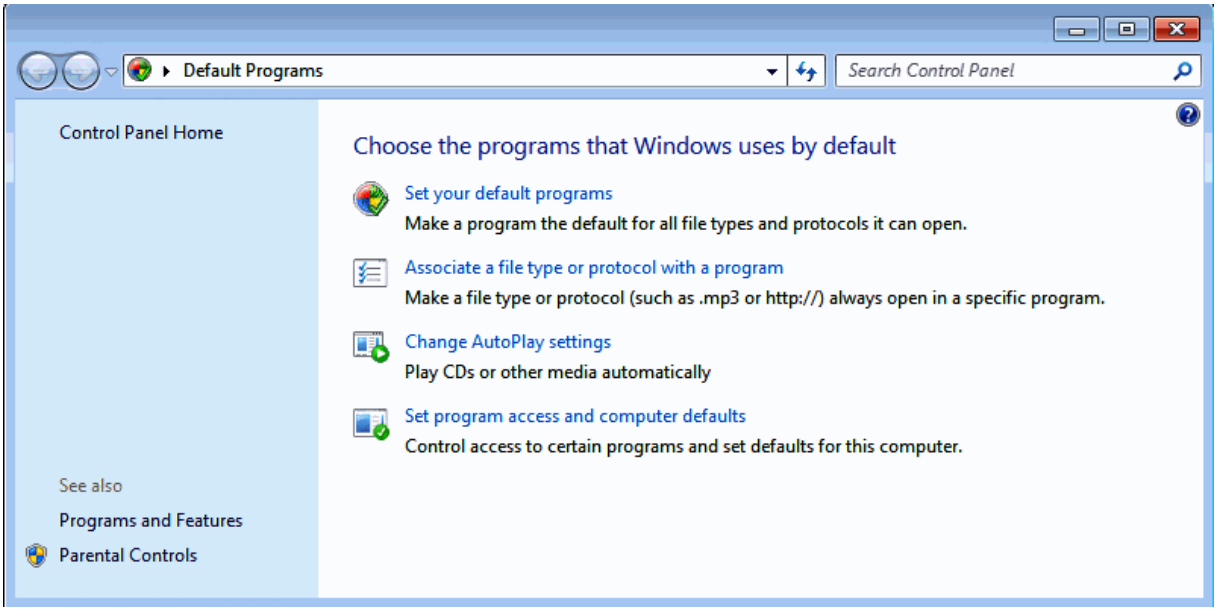


2. In the **Internet Properties** dialog, go to the ***Programs*** tab.

Click the ***Set programs*** button.

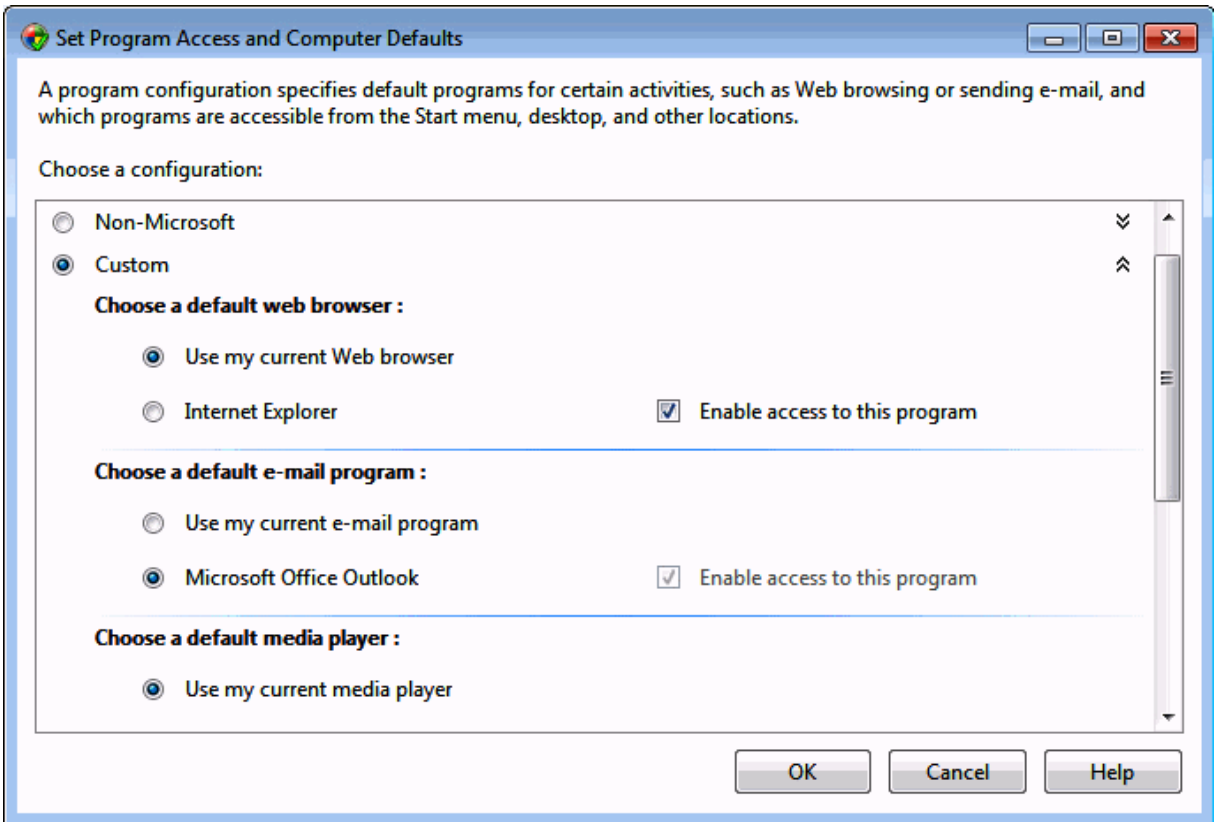


3. In the **Default Programs** dialog, click the ***Set program access and computer defaults*** link.



4. In the **Set program access and computer defaults** dialog – ***Chose a default e-mail program*** section, select the ***Microsoft Office Outlook*** option.

   Click ***OK*** to finish configuration.



CHAPTER 5

Creating New Profile

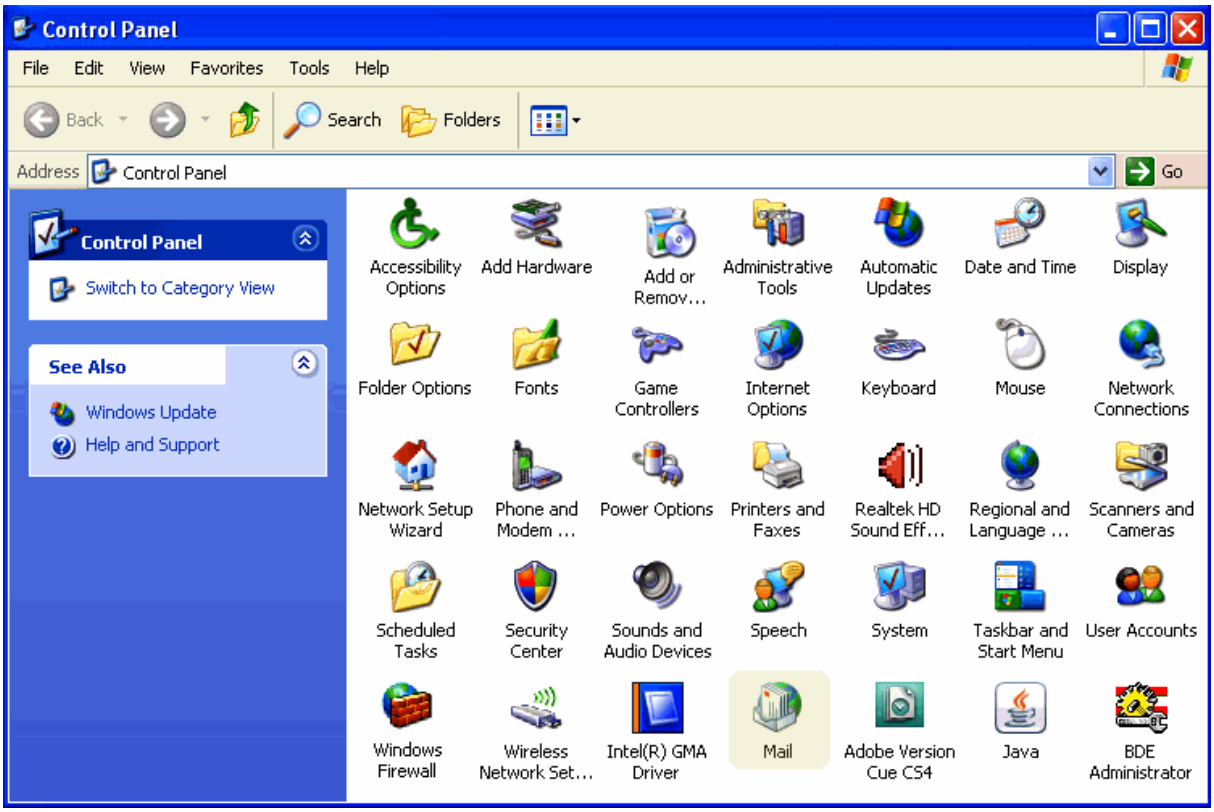
If Outlook ***has been*** installed previously and a user profile has been created, it is recommended that you allow the Outlook Connector installer to create a completely new profile during the installation process.

If Outlook ***has not been*** previously installed, it is recommended that you do not create any user profiles before you install Outlook Connector.

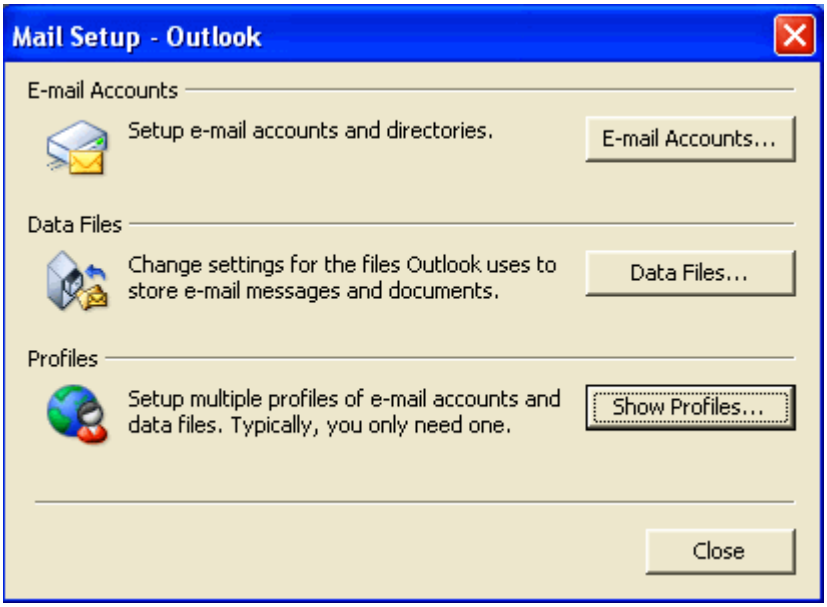
You will be assisted by the setup program to create the Outlook profile. If you made a mistake during the installation or for any other reason you need to create a new profile before or after the installation, this chapter provides you with the necessary steps.

The following steps describe how to create a new email profile:

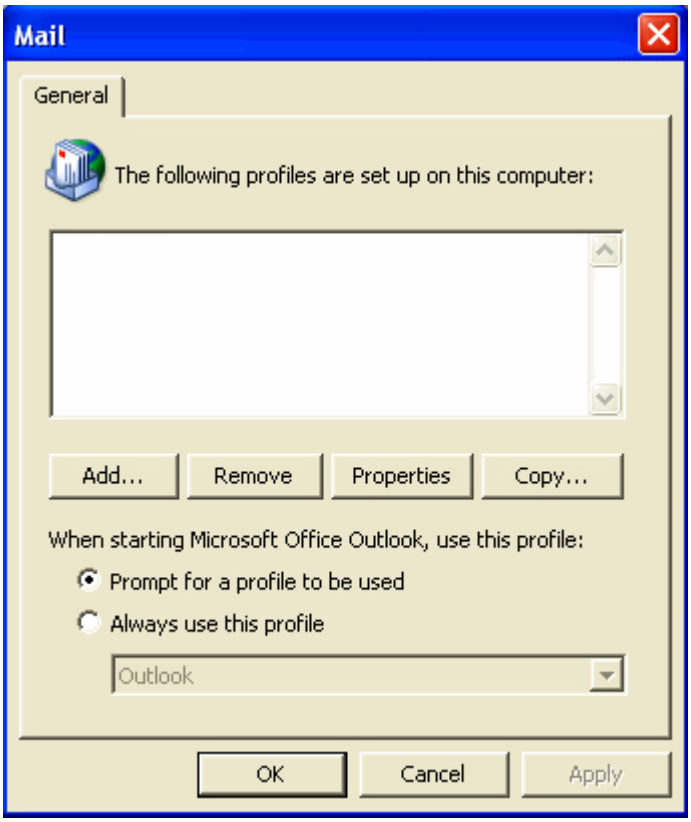
1. In the **Start** menu, click the ***Control Panel*** item.
2. In the **Control Panel** window, double-click the ***Mail*** icon.



3. In the **Mail Setup** dialog, click the ***Show Profiles*** button.



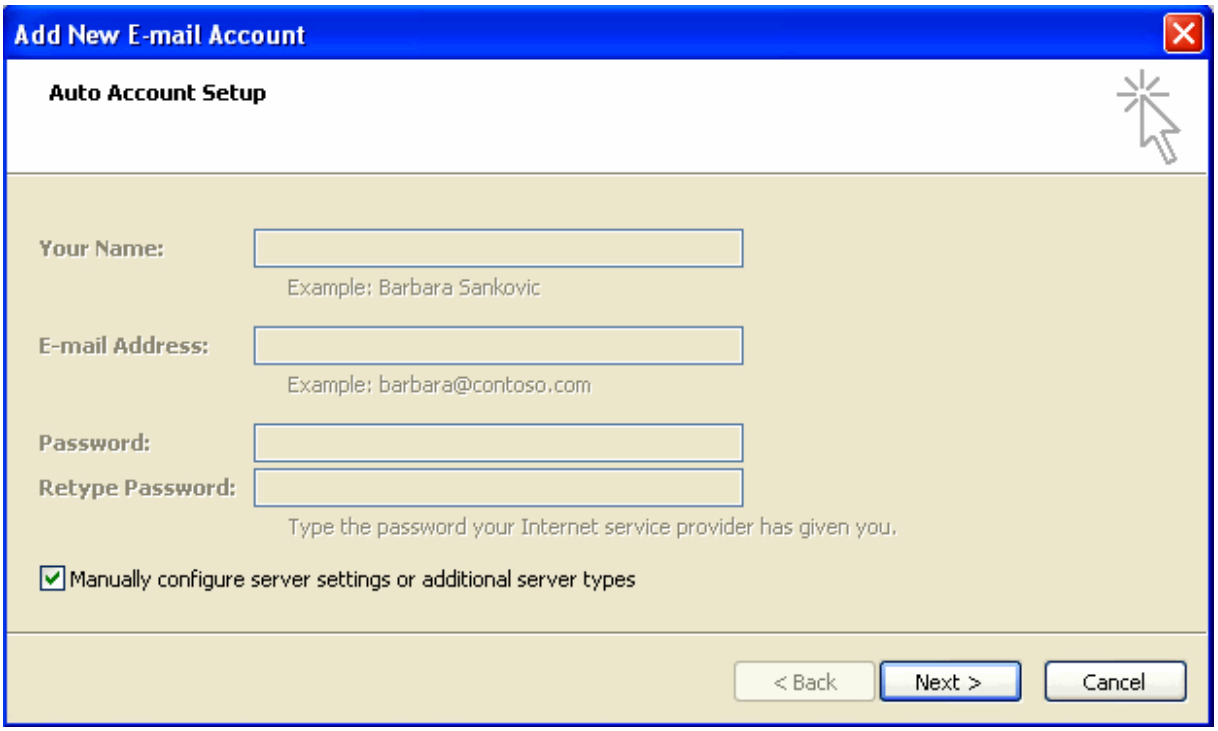
4. In the **Mail** dialog, click the ***Add*** button.



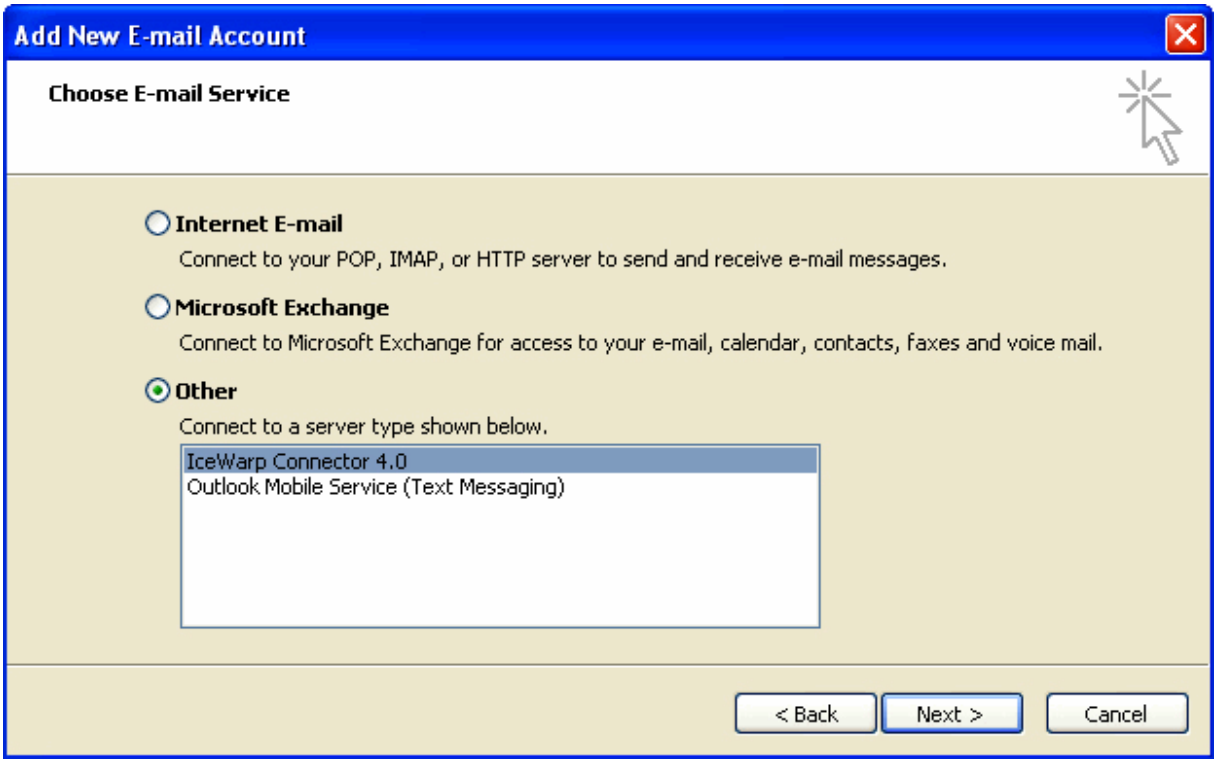
In the **New Profile** dialog, fill in the ***Profile Name*** field and click ***OK***.

The **Add New E-mail Account** wizard opens.

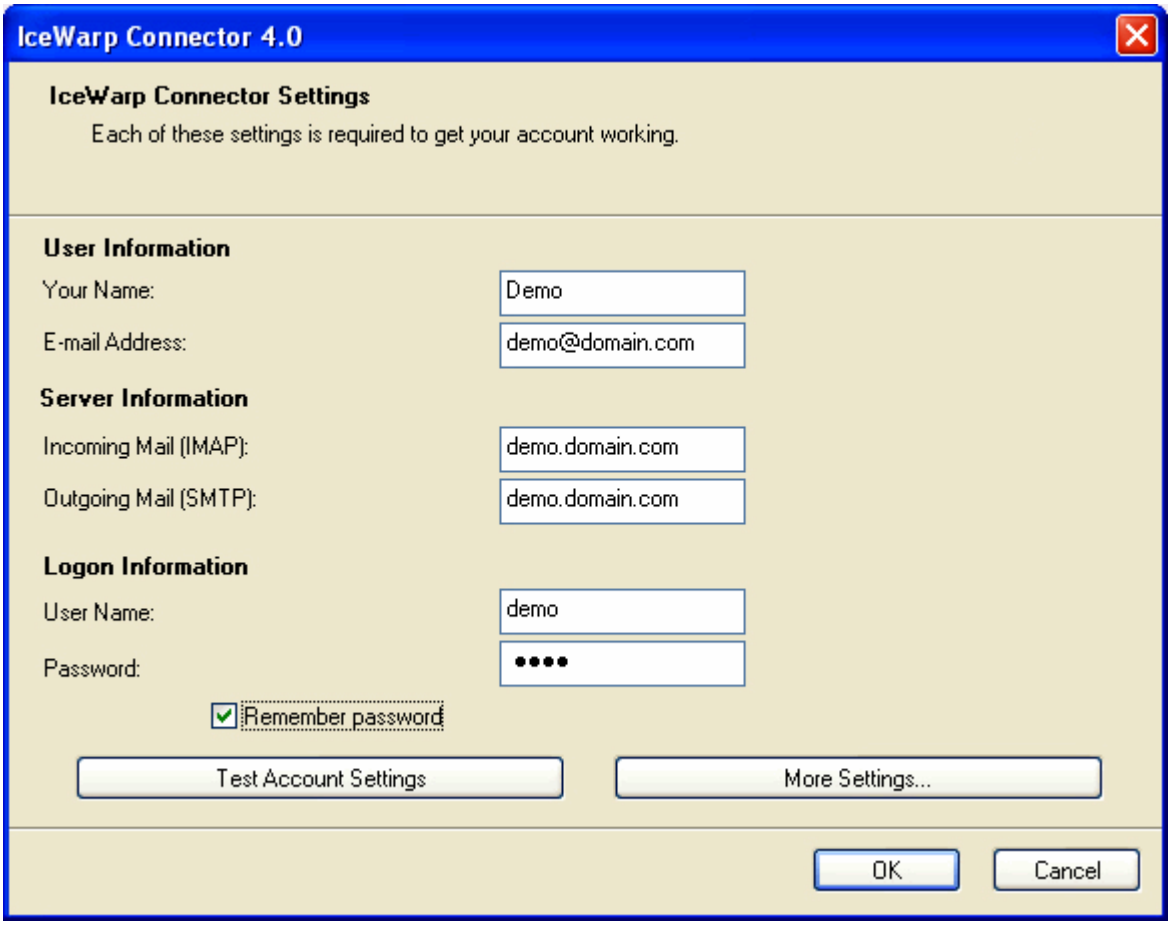
5. On the **Auto Account Setup** page, tick the ***Manually configure server settings ...*** check box and click ***Next***.



6. On the **Choose E-mail Service** page, select the ***Other*** option and click the ***IceWarp Connector 4.0*** item. Click ***Next***.



7. On the **IceWarp Connector Settings** page, fill in all fields. Optionally, tick the ***Remember password*** check box if you want the Connector to remember it. Click the ***Test Account Settings*** button – if settings are correct, you will obtain confirmation message. Click ***OK***.



8. On the **Congratulations** page, click the ***Finish*** button.
9. In the **Mail** dialog, select the ***Always use this profile*** option and select the created profile name. Click ***OK***.

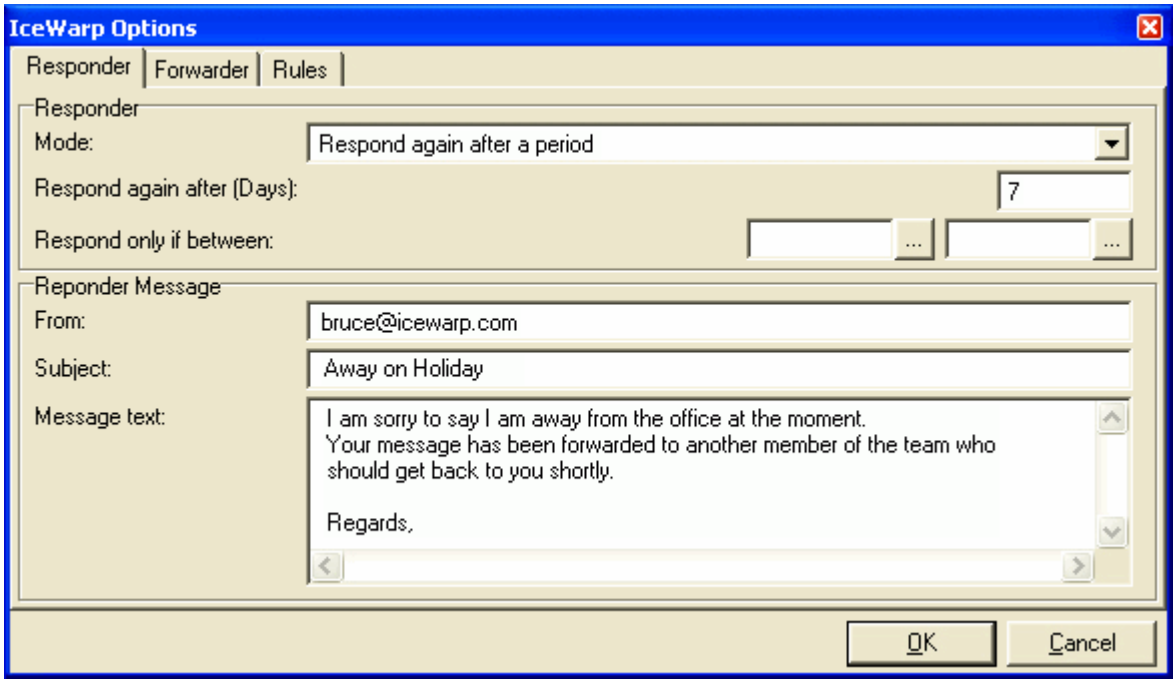
   The profile with your e-mail account is created.

CHAPTER 6

IceWarp Options

Selecting **options** from the sub-menu of an account opens the Account Options dialog where you can set Responder and Forwarder information for your email account:

Responder Options



Field	Description
Mode	Choose a Mode from the drop-down box: **Disabled** No Response is set. **Respond Always** A response is sent for every message that comes in. **Respond Once** A single response is sent to each individual sender of emails. **Respond again after a period** A single response is sent to each individual sender unless another message comes from the same sender after the number of days specified in the next field.
Respond again after	Specify the number of days after which additional responses will be sent (only valid for the

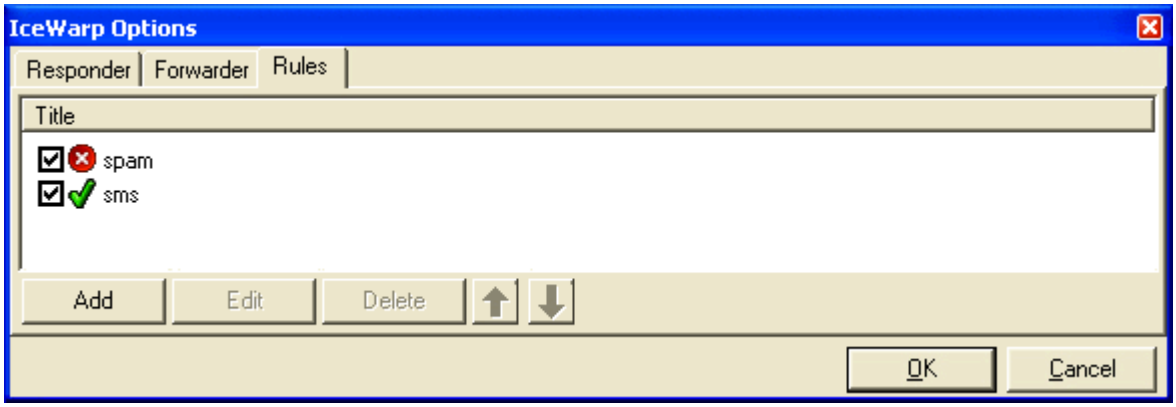
(Days)	"Respond again after a period" option.
From	Specify a "from" address or name for your response email.
Subject	Specify a subject for your response message email. NOTE that you can use server variables here. E.g. ***Re: %%subject%%*** – the original sender will obtain response email with Re: + his/her subject.
Message text	Specify some text to be used as the body of your response email

In the example screenshot above a response will be sent from ***bruce@icewarp.com***, with a subject of ***Away on Holiday*** and the text shown as the body of the message. This message will be sent once in response to each individual sender, but if that sender sends another message more than 7 days after the first he will get the response again.

Forwarder Options

Field	Description
Forward to	Specify an address to have emails forwarded to.
Leave a copy	Check this option to have a copy of the message left in your inbox.

Rules



On this tab, you can define rules for incoming messages. Clicking the ***Add*** or ***Edit*** button reveals the **Rules** dialog.

For detailed information, refer to the **Rules** chapter.

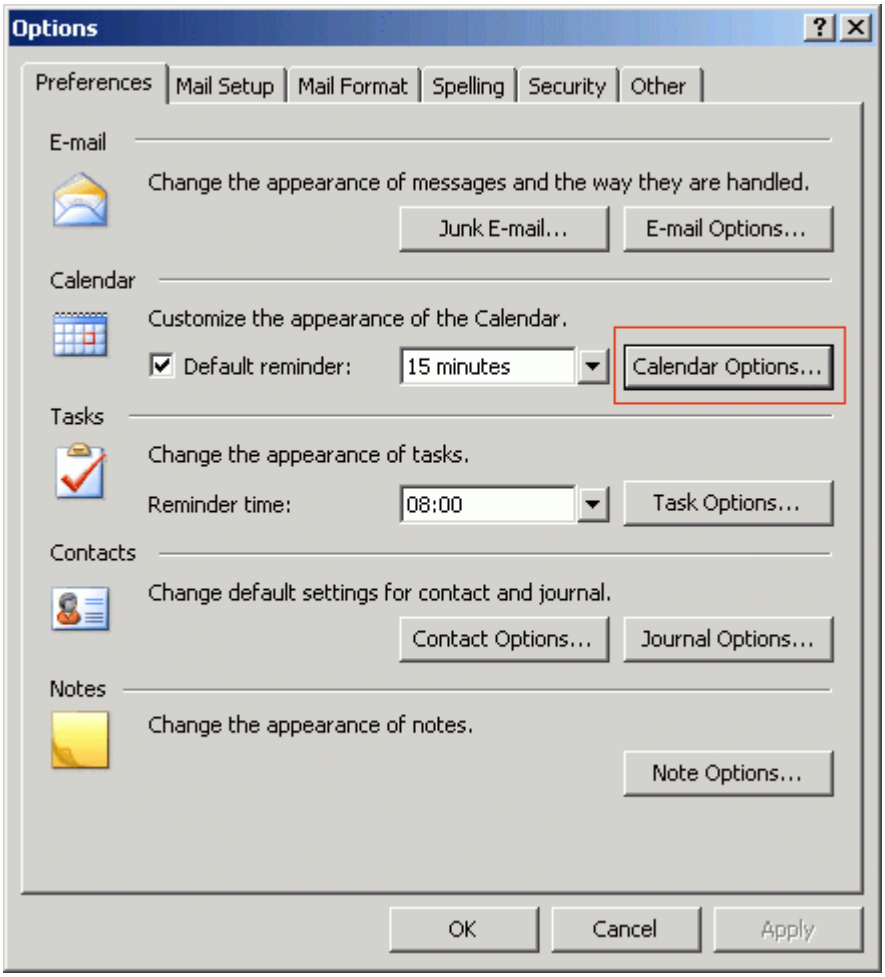
CHAPTER 7

FreeBusy Appointment / Event Arrangement

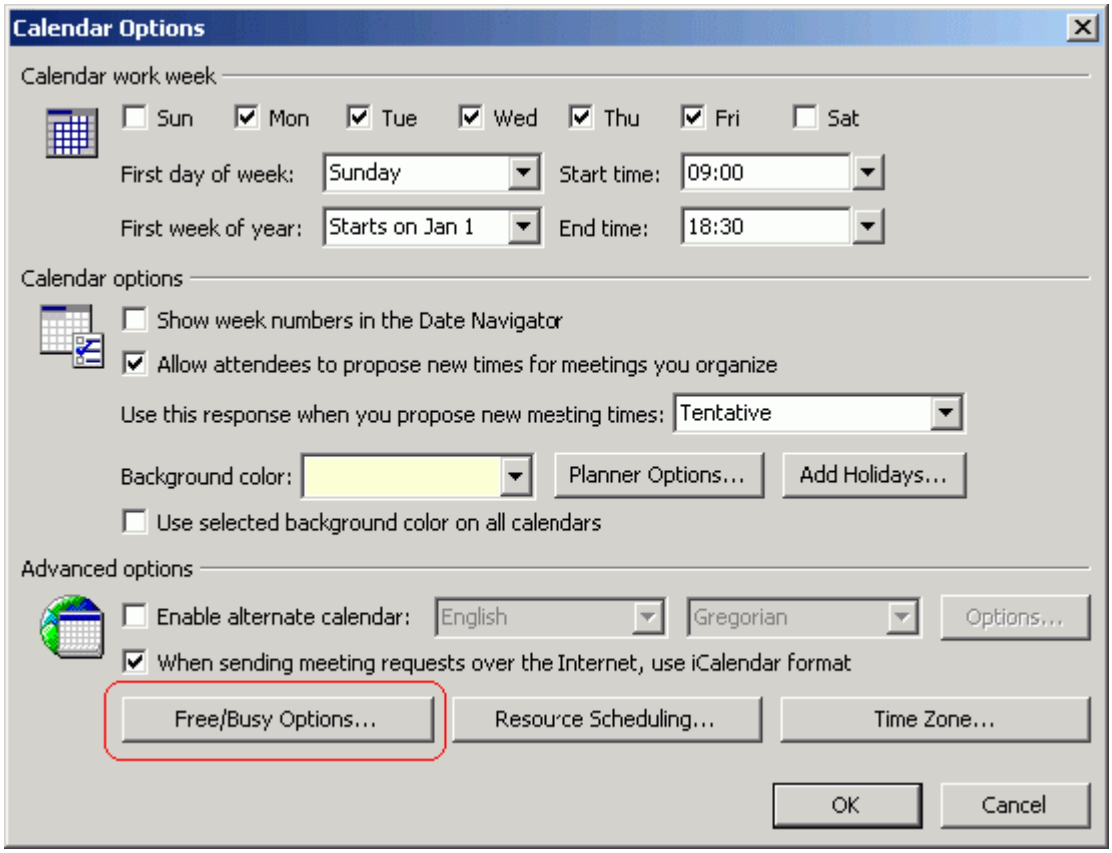
This section describes how to publish your Free/Busy information, allowing yourself and others to schedule meetings with multiple attendees without causing scheduling clashes.

Setting the FreeBusy feature for Advanced Appointment / Event Arrangement

1. To be able to retrieve, view and use 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.
2. On the **Tools** menu, click the ***Options*** item and on the **Preferences** tab, click the **Calendar Options** button. See the screenshots below.



Check if you have the ***When sending meeting requests over Internet, use iCalendar format*** option ticked. (Just above the ***Free/Busy Options*** button.)



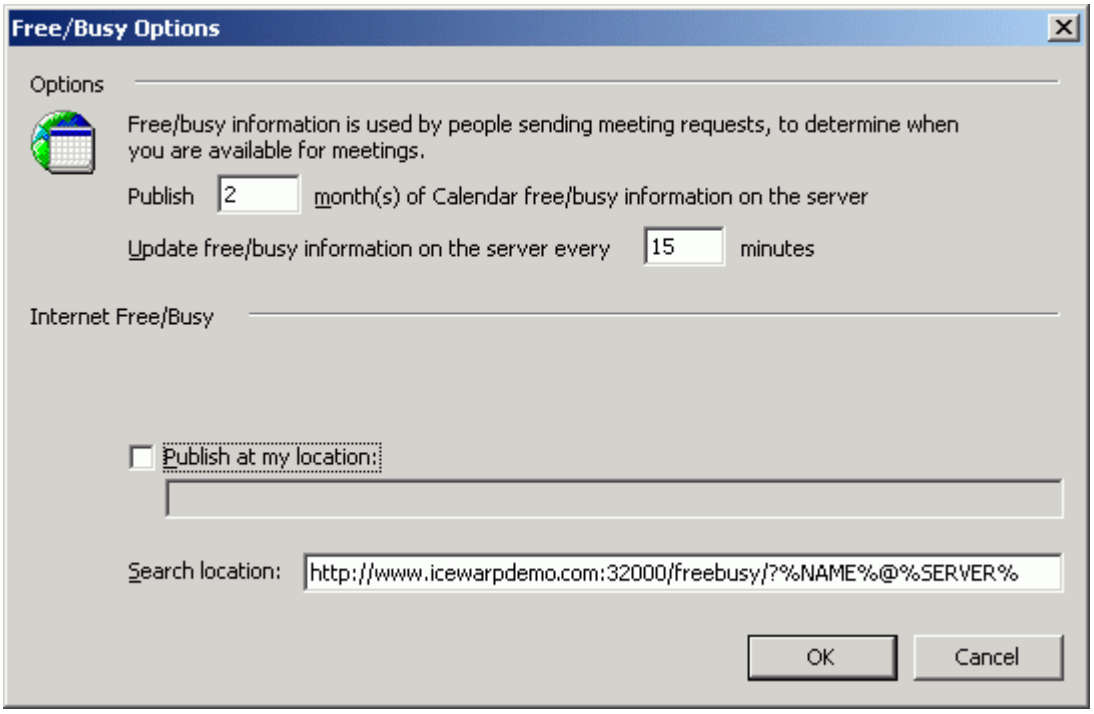
3. Click the **Free/Busy Options** button.

   The only option you need to change here is **Search location**. You need to enter the location of your IceWarp Server in the form:

   http://hostname:[port]/freebusy/?%NAME%@%SERVER%

   The hostname is your webserver and the port is the port that your webserver is set to listen on (default is 32000). The variables %***NAME***% and %SERVER% will be evaluated to the correct email address for your account.

   Example - ***http://www.icewarpdemo.com:32000/freebusy/?%NAME%@%SERVER%*** – see below:



4. Do not check the ***Publish at my location*** box as the IceWarp Outlook Connector 4 will handle this automatically.
5. Click ***OK*** three times to close all dialog boxes.

How to plan a meeting using FreeBusy

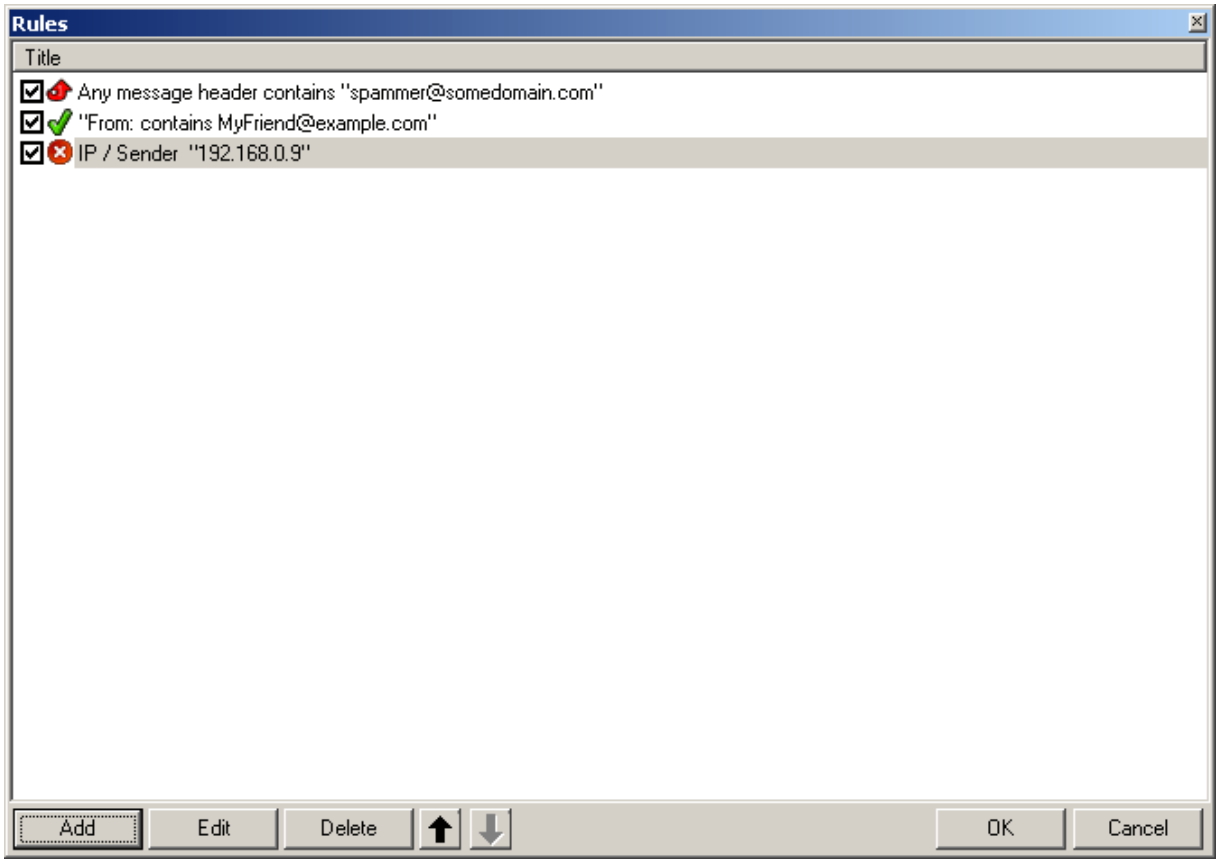
Return to the main screen in Outlook. For planning a meeting, there is nothing really to set manually. Outlook **autodetects the free/busy information** for the people that you invite, and it **automatically inserts their free/busy time periods in the planner**.

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.

CHAPTER 8

Rules

This dialog is the same for all accounts and domains.



Selecting **Mail Service -> Rules** or the **Rules** tab with a Domain or User selected will give you access to the Rules list, allowing you to perform maintenance on the rules.

NOTE that the above graphic may be incorrect depending upon where you are accessing a Rules tab.

Also be aware that Rules are only processed against incoming messages.

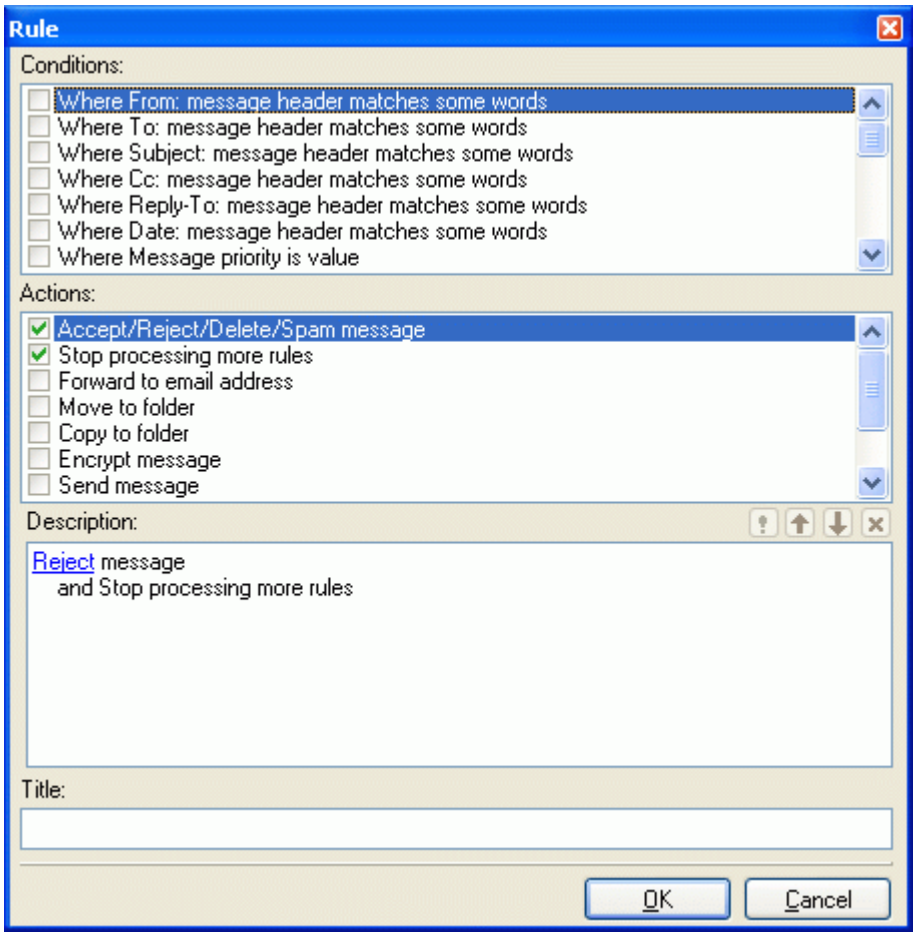
The filter is a text file with a strictly defined format. The file can be edited directly using a standard text file editor but we ***highly*** recommend that you use the **Add**, **Edit** and **Delete** buttons as even the simplest mistake can cause valid emails to be rejected.

Multiple rules can be selected for deletion by holding the Ctrl key and clicking multiple rules.

A range of rules can be selected by clicking the first rule and then clicking the second rule while holding down the Shift key.

Rules can be activated and de-activated by checking/un-checking the box to the left of the rule. This is useful for testing purposes or to disable a rule for a time without deleting it.

Clicking on the **Add** or **Edit** button will open a dialog like this, which allows you to define or modify your rule:



The various options, and the **String conditions** dialog, are discussed in detail in the following table but first we will explain basic use of the three sections of the dialog:

The Conditions block

In this area you can select the properties of the message that you wish to perform some test on.

- Multiple conditions can be tested by checking multiple boxes.
- The same condition can be added multiple times by double clicking the Condition when it is checked.

The Actions block

In this area you select the Action(s) that you want to perform on the message if the Rule evaluates as True

- Multiple actions can be selected by checking multiple boxes.

The Logic Buttons

The buttons below the Actions block are used to add logic to the rule

- The Exclamation mark will negate (NOT) the Condition you are currently modifying.
- The up and down arrows will move the conditions up and down within the rule.
- The X button will delete the current Condition.

We recommend experimentation with these buttons to familiarize yourself with their function

The Description block

This will show the rule you are building or modifying and will change dynamically as you select or de-select Conditions and Actions.

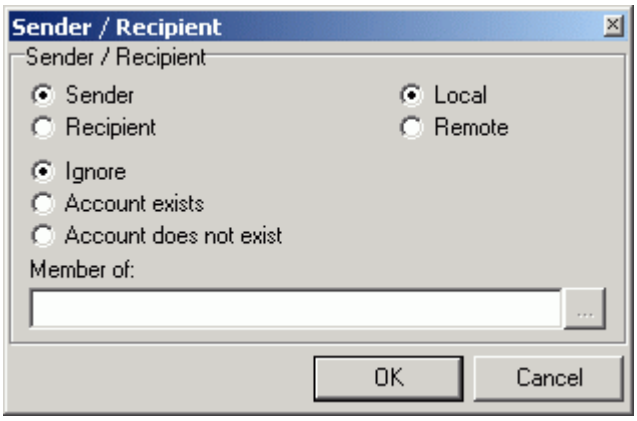
Areas of the rules that can be modified are highlighted in this block and clicking on them will open a further dialog box to allow you to define your test.

Title

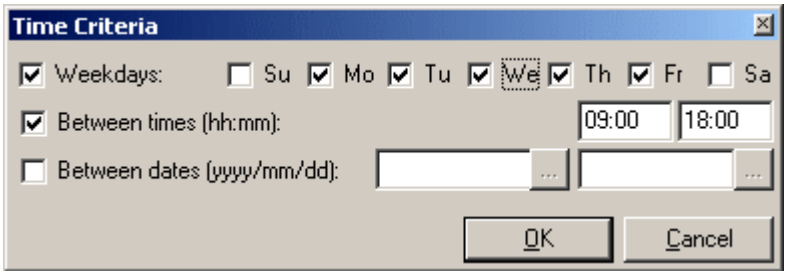
The name of the rule, for identification purposes.

Condition	Description
Where From: message header matches some words	Check the From: header for a string Condition. In the rule description click on **some words** to create the string condition (explained below).
Where To: message header matches some words	Check the To: header for a string Condition. In the rule description click on **some words** to create the string condition (explained below).
Where Subject: message header matches some words	Check the Subject: header for a string Condition. In the rule description click on **some words** to create the string condition (explained below).
Where Cc: message header matches some words	Check the Cc: header for a string Condition. In the rule description click on **some words** to create the string condition (explained below).
Where Reply-To: message header matches some words	Check the Reply-To: header for a string Condition. In the rule description click on **some words** to create the string condition (explained below).
Where Date: message header matches some words	Check the Date: header for a string Condition. In the rule description click on **some words** to create the string condition (explained below).
Where Message priority is value	Check the priority of a message. Click on Normal in the Rule description to select a priority.
Where Message is spam	Check if the message has been marked as spam.
Where Message is size	Check the Message size. Click the 0 kB to select the message size criteria. Select Greater or Lower and specify a Size (in kB)
Where Message body matches some words	Check the message body for a string condition. In the rule description click on **some words** to create the string condition (explained below).

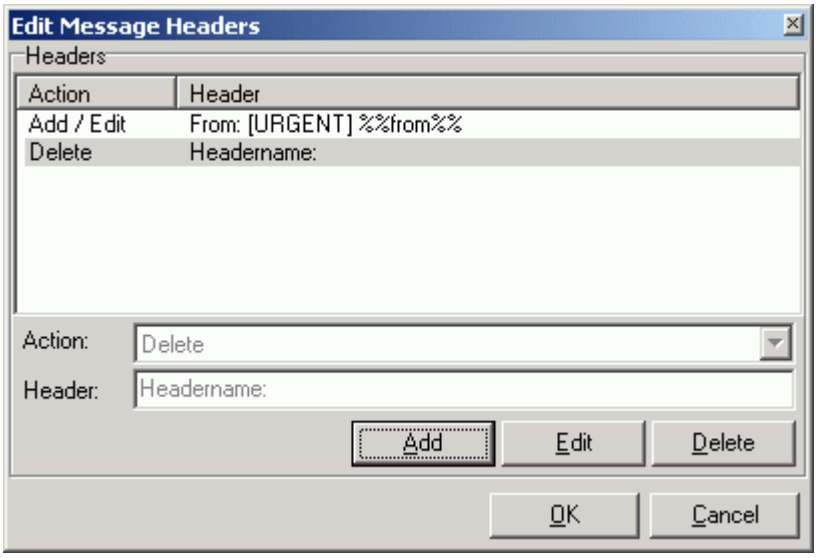
	NOTE - Use this option with care as scanning the whole message body of every incoming message could seriously affect your Server performance.
Where Custom message header matches some words	Check a Custom message Header for a string condition. In the rule description click on **some words** to create the string condition (explained below). NOTE - this rule has an unusual format for the string condition! format - <header>:<string condition> where <header> is the name of your custom header <string condition> is the string condition to test for. Example MyHeader:jim;bob;john Would check the header "MyHeader" for any of the strings "jim", "bob" or "john".
Where Any message header matches some words	Check all headers for a string condition. In the rule description click on **some words** to create the string condition (explained below).
Where Attachment name matches some words	Check the Attachment name for a string condition. In the rule description click on **some words** to create the string condition (explained below).
Where message contains attachment	Check whether the message has an attachment.
Where Sender matches some words	Check the Sender for a string condition. In the rule description click on **some words** to create the string condition (explained below).
Where Recipient matches some words	Check the Recipient for a string condition. In the rule description click on **some words** to create the string condition (explained below).

<table>
<tr><td>Where Sender/Recipient is local/remote</td><td>Check the location of the sender or recipient. In the rule description click on local/remote to open the following dialog:
 

Sender / Recipient
Select whether you want to check the the Sender or Recipient address
Local / Remote
Select whether you want whether the chosen address is a Local account or a Remote account.
Ignore / Account exists / Account does not exist
select whether you want to check whether the account exists, doesn't exist, or ignore this check.
Only available for Local accounts
Member of:
Check whether the account belongs to a particular Domain, Group, Mailing List etc.. Press the '...' button to open the standard Select Item dialog.
Only available for local accounts that you check the existence or non-existence of</td></tr>
<tr><td>Where Sender's IP address matches some words</td><td>Check the Remote IP address for a string condition. In the rule description click on some words to create the string condition (explained below).</td></tr>
<tr><td>Where rDNS (PTR) matches some words</td><td>Check the rDNS (PTR) record for a string condition. In the rule description click on some words to create the string condition (explained below).</td></tr>
<tr><td>Where Sender's IP address is trusted</td><td>Check if the Senders IP address is in the trusted list</td></tr>
<tr><td>Where Spam score is value</td><td>Click on 0.0 in the Rule description to define a greater than or less than value to check the spam score against.</td></tr>
<tr><td>Where SMTP AUTH</td><td>Check if this message was delivered using an SMTP Authorized connection</td></tr>
<tr><td>Where Local time meets criteria</td><td>Click the criteria link to define time in the Time Criteria dialog. Select Week days and/or hours and/or dates to set criteria for processing messages.</td></tr>
</table>

	
All messages	A special condition that evaluates TRUE for all messages - use with care!
String Testing	**Description**
	Clicking on **some words** (in a new condition) or the string itself (in a condition already defined) will open the **String Condition** dialog box. There are four options available in the dialog: The Function drop-down box offers 7 options for the string test, the option chosen effects the content required in the **String** text-box
Contains list of strings (semi-colon separated)	Populate the **String** box with a list of strings to test for
Regex	Populate the **String** box with a regular expression. There is a basic Regex tutorial here
Starts with string	Looks for the string specified in the **String** box at the start of the tested condition
Ends with string	Looks for the string specified in the **String** box at the end of the tested condition
Is string	Tests whether the tested condition is ***exactly*** equal to the string specified in the **String** box
Contains list of strings from file	The **String** box should contain the path to a text file containing a list of strings you wish to test for. Press the "..." button to open a file dialog to navigate to a file where you can specify strings, one per line.
NOT	Check this box to use negation of the selected string test. E.g. select the ***Any message header matches some words*** condition, select the ***Contains list of strings ...*** option, write IceWarp into the ***String*** field and tick this box. All emails with headers without the defined word (IceWarp here) will undergo the defined action (see further).
Match case	Check this box to take string case into account.
Match whole word only	Check this box to perform a standard "whole word" check against the string.
Actions	**Description**
	The following Actions are available when a Condition is evaluated TRUE. Multiple Actions can be selected by checking multiple boxes. Selecting an Action will add the Action to the Description box and for some Actions you are able to click the text in the description to define the Action further. Details follow:
Accept/Reject/Delete/Spam/ **Quarantine**	Adds an Action to Reject (default) the message. Click on **Reject** in the Description area to select Reject, Accept, Delete, or mark the message as Spam.
Stop processing more	Stop any further Rules from being processed, if this Rule is evaluated as TRUE.

rules	
Forward to email address	Forward the message to an email address. Click **email address** in the Description area to specify the email address. NOTE - that you can also send an instant message or an sms using this option: sms - use sms:<number> e.g. sms:0123456789 IM - use xmpp:<jabberid> e.g. bruce@icewarpdemo.com
Move to folder	Move the message to a folder. Click on **folder** in the Description area to select the folder to move to. NOTE - The folder tree does not fill when you access this Action within Content Filters, you have to manually specify a mailbox. ALSO - although the INBOX folder may be shown in the folder tree, there is little point selecting this folder as this is the default folder that messages will come in to. ALSO - that you can have email delivered to a specific mailbox folder by specifying %%Extension%% as the folder name. When this is specified IceWarp Server will look for a folder name within the email address and store the message to that folder if it exists. Example: A message sent to john:%%important%%@icewarpdemo.com will be stored in the folder important Note the colon used to separate the User alias from the folder name, this can be changed to another character using the API.
Copy to Folder	Copy the message to a folder. Click on **folder** in the Description area to select the folder to copy to. NOTE - The folder tree does not fill when you access this Action within Content Filters, you have to manually specify a mailbox. ALSO - although the INBOX folder may be shown in the folder tree, there is little point selecting this folder as this is the default folder that messages will come in to. ALSO - that you can have email delivered to a specific mailbox folder by specifying %%Extension%% as the folder name. When this is specified IceWarp Server will look for a folder name within the email address and store the message to that folder if it exists. Example: A message sent to john:%%important%%@icewarpdemo.com will be stored in the folder important Note the colon used to separate the User alias from the folder name, this can be changed to another character using the API.

Encrypt message	Check this option to have the message encrypted. NOTE -that for this option to work there must be a copy of the User's public certificate located in a file called cert.pem in the User's mailbox folder. The message will be encrypted using this certificate and then can only be decrypted by the user using his private key in his email client.
Send message	Send a message. Click **message** in the Description area to open a dialog to define the message. You can define To, From and Subject fields, the Text of the message (or a file to retrieve the text from), the type of message (text, HTML, or message with attachment) and whether the message is email, an instant message, or both.
Edit message header	Select this option to Add, Edit or Delete a message header. Click on header to open the Edit Message Headers dialog.  Click Add to add a new rule. Select an already defined rule and Click Edit or Delete to modify or remove a rule. In the Action drop-down you should select whether this rule will Add/Edit a header or Delete a Header. In the Header field you should specify the header you are actioning - remember that a header name should always finish with a colon. You can also add your own named headers e.g. MyHeader: The first rule shown in the screenshot above modifies the From header - it adds the string "[URGENT]" to the start of the header. Note the use of the IceWarp Server system variable %%from%% here, which is the value of the original From header. Any system variable can be used. The second rule simply deletes the From header.
Set message priority to value	Select this option to have the priority of the message changed. Click on Normal to select the new priority to be assigned.
Set message flag	Select this option to set a message flag. Click on flags to set the flag(s) you wish.

CHAPTER 9

Reporting Problems

When reporting problems, please 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.

- Microsoft Outlook version and patch level

  Right click the ***Help*** in Outlook and select ***About Microsoft Outlook***. The Outlook version and patch level will be listed.

- The full version number of the Outlook Connector

  In Outlook, select ***Inbox*** from the Folder List then click ***About*** in the Connector toolbar. The Connector version and build number (3.1-xxxx) will be listed.