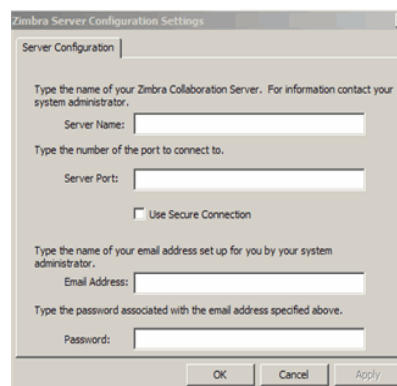

How to Install and Use Zimbra Connector for Outlook

With the Zimbra™ Collaboration Suite Connector for Outlook (ZCO), you can use Microsoft® Outlook 2003 to access your Zimbra server and synchronize your email messages, contacts including personal distribution lists, personal calendars, and tasks between Outlook and the Zimbra server.

Read and complete the following instructions to install and set up the ZCO on your computer. Your system administrator will tell you how to access the ZCO install package to get started.

Installing ZCO creates a Outlook mail profile named Zimbra and designates this profile as the default.

1. When you click on the .msi install file, the **Welcome** dialog displays. Click **Next**.
2. The End-User License Agreement displays, Read the license agreement and click **I accept the terms in the License Agreement**. Click **Next**.
3. The installer is ready to install ZCO on the computer. Click **Next**.
4. When the **Installation Complete** dialog displays. Click **Close**.
5. Next open Outlook on your computer. If the server configuration was not automatically completed, the **Zimbra Server Configuration Settings** dialog opens. Your system administrator will give you instructions about completing this page.



The screenshot shows a dialog box titled "Zimbra Server Configuration Settings" with a tab labeled "Server Configuration". The dialog contains the following fields and options:

- Text input field: "Server Name" (with instruction: "Type the name of your Zimbra Collaboration Server. For information contact your system administrator.")
- Text input field: "Server Port" (with instruction: "Type the number of the port to connect to.")
- Checkbox: "Use Secure Connection" (unchecked)
- Text input field: "Email Address" (with instruction: "Type the name of your email address set up for you by your system administrator.")
- Text input field: "Password" (with instruction: "Type the password associated with the email address specified above.")

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Apply".

The following is configured for the Server Configuration page:

- **Server Name.** Type the Zimbra server domain name (DNS).
 - **Server Port.** Type the port number for the server. Usually 80 is the port number for non-secure connections, and 443 is the port number for secure connections.
 - **Use Secure Connection.** Check this box, only if your administrator instructs you to.
 - **Email address.** Type your email address. The address should be entered as **name@domain.com**.
 - **Password.** Type your Zimbra account password.
6. Click **OK**. The installation of ZCO is complete and the Zimbra profile has been created.

You can now log on and use Outlook.

Synchronizing to the Zimbra Server

The first time you open Outlook after ZCO is installed, your Outlook mailbox must synchronize with your account on the Zimbra server. If the sync does not automatically start, click **Send/Receive All** (F9) on the Outlook toolbar. The initial sync can take some time, as all your messages, folders, contacts, and calendar schedules must be synchronized to Outlook. Subsequent synchronizations are fast.

Important: *If you are running McAfee®'s On-Delivery E-mail scanner option, the initial sync is very slow. We recommend that this option be turned off for the initial sync with the Zimbra server.*

Note: *Outlook Notes and Journal are not synchronized and will be lost when the initial sync is performed. Before you perform the initial sync, save these items to a pst file and then load the pst after the initial sync to the Zimbra server is performed. See the Outlook Help for information about how to create a new data file (.pst) and how to reload the data files with the notes and journal entries.*

When you are working in Outlook and are connected to the internet, your email is automatically synchronized in Outlook as data changes. When you are working offline, only these files are available.

Email that you create while working offline is saved to your Outbox and is automatically sent when you connect to the Zimbra server.

Note: *When you archive items using either Outlook auto archive or manually, the items are removed from the Zimbra server. Your archive pst file has the only copies of these archived items.*

Features Differences When Using Outlook

Mail, Calendar, and Address Books are synchronized to Outlook. If you used the Zimbra Web Client before, note that the following does not work in Outlook.

- Outlook Notes and Journal are not synchronized with the Zimbra server.
- You log on to the Zimbra Web Client to set up and turn off your out-of-office alerts.
- The Outlook Rules and Alerts features does not work with the Zimbra server. If you created filter rules from the Zimbra Web Client Options feature, they are enforced, but you cannot use Outlook to view or change these rules.
- Search Folders created in the Zimbra Web Client do not synchronize in Outlook.

Sharing Your Folders

You can share any of the Outlook folders in your mailbox with users that are in the Global Address List on the Zimbra server. When you share your folder, you identify the user to share the folder with, and you assign the user a role to determine the level of access. Roles are preset combinations of access privileges. The access privileges are defined as follows:

- **Read.** View Items in the folder
- **Edit.** Edit the content of the folder
- **Create.** Add items to the folder
- **Delete.** Delete items from the folder
- **Act on workflow.** Respond to meeting requests in the folder
- **Administer folder.** Modify the permissions of the folder

The following are the roles that can be granted to a user:

Administrator (Read, Edit, Create, Delete, Act on workflow, Administer folder)

The grantee has the same access to the folder as the owner. They can create new items in the folder, read and edit the content of the folder, administer the folder, act on workflow items, and delete items from the folder.

Delegate (Read, Edit, Create, Delete, Act on workflow) The grantee can create new items in the folder, read and edit the contents in the folder, act on workflow items, and delete items from the folder.

Editor (Read, Edit, Create, Delete) The grantee can create new items in the folder, read and edit the content in the folder, and delete items from the folder.

Author (Read, Create) The grantee can create new items and read the content of the folder.

Reviewer (Read) The grantee can read the content of the folder. This is the default.

Follow these steps to share a folder with another user:

1. Right-click on the folder to share and select **Properties**.
2. On the Sharing tab, click **Add** to show the names in the Global Address List.
3. Select the name(s) you want to delegate access.
4. Click **OK** when done. The names you selected are listed in the Sharing tab.
5. Pick the role that defines the access privileges.
6. If you want the grantee to share all the sub folders under the folder, check the **Inherited by Subfolders** box.
7. Click **OK**.
8. Click **Send/Receive** on the toolbar to send the shared access information to the Zimbra server. **Important:** If you do not synchronize with the Zimbra server, the shared access is not set up.
9. Notify users that they have been given shared access to your folder.

Changing or Revoking Access

You can view access permissions for folders, and you can change roles and delete access.

1. Right-click on the folder that is shared and select **Properties**.
2. Click the **Sharing** tab to see who has been given permission to access the folder.
3. To edit the permissions, select the name and change the permission levels. To cancel the access, select the name and click **Remove**.
4. Click **OK**.
5. Click **Send/Receive** on the toolbar to send the changes to the Zimbra server. The next time the grantee syncs with the Zimbra server, the shared folder information is updated. If you deleted access, the folder is removed.

Mounting Shared Folders

When you have been notified that you have been granted access to someone's folder, you access the folder as follows:

1. On the Outlook menu bar, go to **File>Open>Other's User's Mailbox**.
2. Select the user name who has given you access. Click **OK**.

3. Click **Send/Receive** on the toolbar to synchronize the folder to your Outlook.

Depending on the permission granted, you may be able to move files to other folders, delete files, and add new files. When you synchronize, the changes are forwarded to the Zimbra server. The next time grantors sync with the Zimbra server, their Outlook folders are updated to reflect changes you made to their folders.

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