
How to Install and Use Zimbra Connector for Outlook

With the Zimbra™ Collaboration Suite Connector for Outlook (ZCO), you can use Microsoft® Outlook® 2003 and 2007 to access your Zimbra server and synchronize your email messages, tags, 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 installation 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 **Confirm Installation** dialog displays. Click **Next** to begin the installation.
4. When the **Installation Complete** dialog displays, click **Close**.
5. 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.



Complete the following 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 with 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** on the Outlook toolbar. The initial sync can take some time as all your messages, tags, folders, contacts, and calendar schedules must be synchronized. Subsequent synchronizations are fast.

Important: *If you created Notes and Journal in Outlook, these items will be lost when an initial sync is performed. Before you perform the initial sync, save these Outlook items in pst format and then import the pst file after the initial sync 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.*

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

When you are working in Outlook and are connected to the Internet, your email is automatically synchronized with Outlook as data changes. When you are working offline, only the files on Outlook 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, Tags, Calendar, Tasks, and Contacts are synchronized with 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.
- Out-of-office alerts created in Outlook do not work. You can log on to the Zimbra Web Client to set up and turn off your Out of Office alerts.
- Search Folders created in the Zimbra Web Client do not synchronize with Outlook.

The following works differently when used in Outlook

- Filter rules for your Zimbra account can be created and edited in Outlook by using the **Tools>Zimbra Server Rules**.
- Zimbra tags are synchronized with corresponding Outlook categories. The colors assigned to a category in Outlook may not correspond with the color assigned to the matching Zimbra tag. You can change the color in the Outlook client at any time.

Browsing by Tags

Zimbra tags are synchronized with corresponding Outlook categories. Although the tags are not displayed in the side bar when you are using Outlook, you are still able to view your mail by the categories assigned to it. In order to view your mail by category, you must go to your Search Folders and select the Categorized Mail folder.

Sharing Your Folders

You can share your mail folders, calendars, contacts, and tasks. Mail folders can only be shared with other Zimbra users. Calendars, contacts, and tasks can be additionally shared with external users or shared publicly. In order to share these folders, you must have the Zimbra sharing add-in enabled. Zimbra automatically checks if this add-in is enabled when you first start Outlook. If it is not enabled, an alert message will ask you if you want to enable it.

When you share your folder, you identify whether to share your folder internally, externally, or to create a public share. Internal shares can be with Zimbra users or groups listed in the Global Address List (GAL). External shares allow a specified user to view your folder using their email address and a password that you assign to them. Public shares allow anyone to view your folder using the URL of the folder.

For internal Zimbra users, you then assign the user a role to determine the level of access. External users and public shares will always be shared with

reviewer rights. 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. All external user shares and public shares will be Reviewer shares.

To share a folder with another Zimbra user

Follow these steps to share a folder with another Zimbra 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 **Internal**.
4. Click **Ok**.
5. Select the name(s) you to whom you want to delegate access, and add them by clicking the **To** button or by double clicking on each name.
6. Click **OK** when done. The names you selected are listed in the Sharing tab.

7. Pick the role that defines the access privileges for each person, using the **Permission Level drop-down** menu.
8. If you want the grantee to share all the sub folders under the folder, check the **Inherit Permissions from Parent** box.
9. Click **OK**.
10. 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.*

You have now finished sharing a folder with another Zimbra user. It is recommended that you notify the person who now has access to your folder. (For example, "I have just shared one of my folders with you. To access this folder, go to **File>Open>Other** User's Mailbox, and select my name from the address book. My folder will be added to your Mail Folders list.")

To share a folder with an external user

Follow these steps to share a folder with an external user:

1. Right-click on the folder to share and select **Properties**.
***Note:** Mail folders cannot be shared with external users.*
2. On the Sharing tab, click **Add** to show the names in the Global Address List.
3. Select **External**.
4. Type the email address of the external user to share the folder with in the **Email Address** field. Type a password in the **Password** field. This is the password that they will need to use in order to access the folder you are sharing with them.
5. Click **OK** when done. The email address of the external user is listed in the Sharing tab. The permission level is set to Reviewer. This cannot be changed.
6. If you want the grantee to share all the sub folders under the folder, check the **Inherit Permissions from Parent** 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.*

You have now finished sharing a folder with an external user. It is recommended that you notify the person who now has access to your folder, letting them know the URL of the folder and their login information.

In order to access this folder, the external user will need to go to the folder's URL using a Web browser. The URL will be your mail server's address, followed by **/home/username/folder**. For example, if your mail server is **https://mail.example.com/**, your username is **Joe**, and you have just shared your Tasks folder, the URL for your shared folder would be **https://mail.example.com/home/Joe/Tasks**. The external user must access this folder using a Web browser. They will be prompted for their email address and the password that you assigned to them.

To create a public share

Follow these steps to create a public share:

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 **Public**.
4. Click **OK** when done. Public is listed in the Sharing tab. The permission level is set to Reviewer. This cannot be changed.
5. If you want to share all the sub folders under the folder, check the **Inherit Permissions from Parent** box.
6. Click **OK**.
7. 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.*

You have now finished creating a public share. In order to access this public share, users will need to go to the folder's URL using a Web browser. The URL will be your mail server's address, followed by **/home/username/folder**. For example, if your mail server is **https://mail.example.com/**, your username is **Joe**, and you have just publicly shared your Tasks folder, the URL for your shared folder would be **https://mail.example.com/home/Joe/Tasks**.

Changing or Revoking Access

You can view access privileges 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 when the grantee syncs.

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 User's Mailbox**.
2. Select the user name who has given you access. Click **OK**. The folders that have been shared are added to the bottom of your Mail Folders list.
3. Click **Send/Receive** on the toolbar to synchronize the folder with 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.

Personas

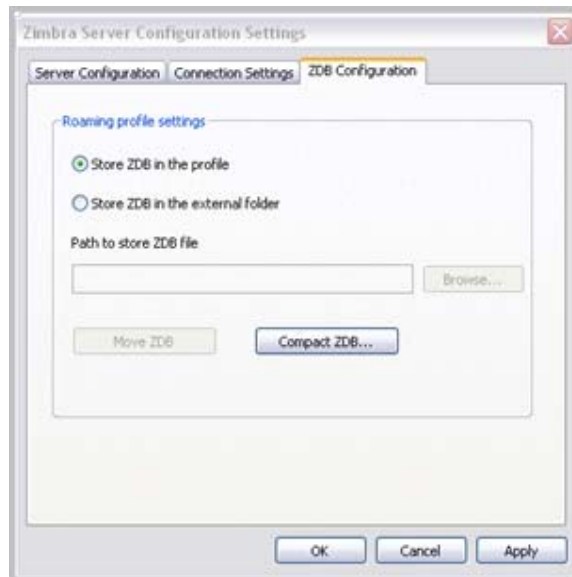
You can create personas in order to easily manage several mail accounts from one mail profile. By using a persona, you can specify a **From** address and/or a **Reply To** address. In order to add, delete, or edit a persona, go to **Tools>Options**, and select the **Persona** tab. After adding, deleting, or editing a persona, be sure to click **Send/Receive** on the toolbar in order to sync the changes with the Zimbra server.

ZDB Configuration

ZCO supports relocating a ZDB file to set up a roaming profile and ZDB file compaction.

- Roaming profiles allow you to store your Outlook profile information and settings on a remote machine.
- ZDB file compaction allows you to save disk space by compressing your profile information and settings. Use the following steps to set up a roaming profile or compact your ZDB file.

1. Go to **File>Data File Management**. The Account Settings window will open, showing the Data Files tab.
2. Select the Zimbra profile you want to edit and click **Settings**, or double-click on the profile to be edited. The Zimbra Server Configuration Settings window opens.
3. Go to the ZDB Configuration tab.



4. If you are configuring a roaming profile, select **Store ZDB in the external folder**. Click **Browse**, and select the directory in which you want to store your profile.
5. If you are compacting your ZDB file, click **Compact ZDB**. A progress window opens. When the window closes, the ZDB compaction is finished.
6. Click **OK**.

You are now finished configuring your ZDB file.

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