



Software602 Groupware Server 6.0

Outlook Connector Manual

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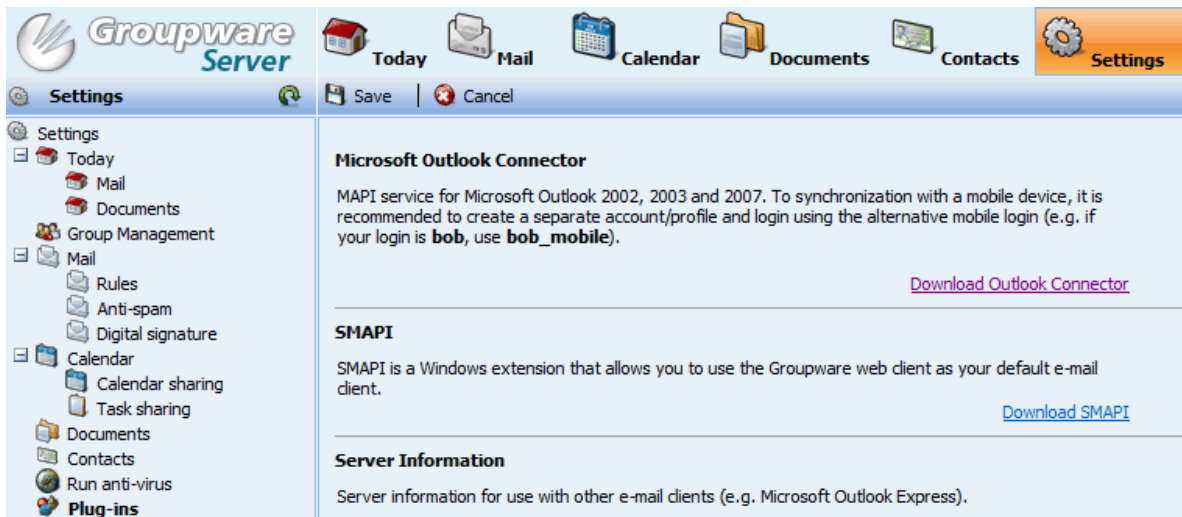
Introduction

The Outlook Connector provides real-time two-way synchronization of mail, contacts, tasks, and calendar events between Outlook and the Groupware Server. The connector supports Microsoft Outlook 2002, 2003 and 2007.

Installation

The Outlook Connector software is available for download from the web-based Groupware Client. To download and install the connector, do the following:

1. Login to the Groupware Client via your web browser and click the Settings button at the top of the page.
2. Click the Plug-ins item on the left side of the screen.
3. Click the Download Outlook Connector link and save the file to your desktop.



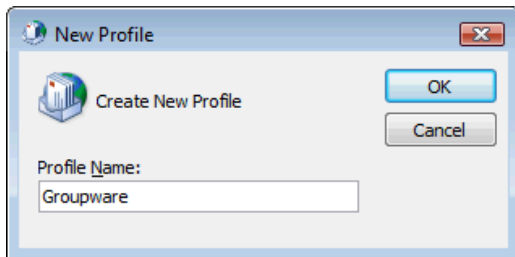
4. After the download is complete, navigate to where you downloaded the file, and double-click to the Software602-OutlookConnector.exe file to start the installation.
5. Click Next to continue.
6. Read and accept the License Agreement by clicking the I accept the agreement radio button, and then click Next to continue.
7. If you need to install the software in a special location, enter the path here, otherwise, click Next to continue.
8. Choose if want the Outlook Connector toolbar to be hidden and click Next to continue.
9. Click Install to begin the installation.
10. Click Finish to complete the installation.

NOTE: By default, users are not members of the Outlook Connector user group in Software602 Groupware Server. Membership to this group is required in order to download and use the Outlook Connector software.

Outlook Configuration

Outlook 2002/2003

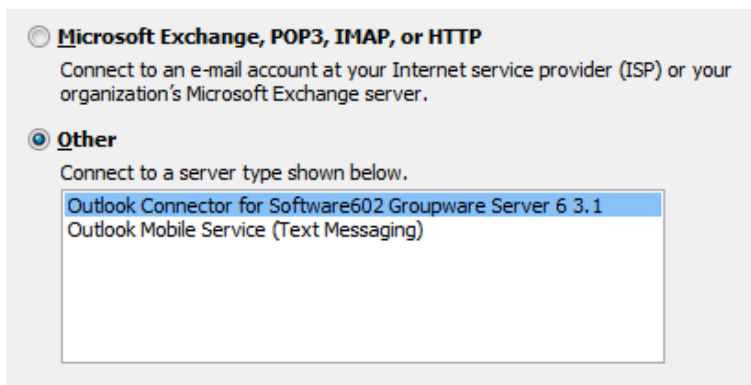
1. Open Control Panel -> Mail.
2. Click Add... and you will be prompted for a profile name, enter Groupware and click OK.



3. Select the Add new e-mail account option and click Next.
4. On the next screen choose Additional Server Types and click Next.
5. Select Outlook Connector for Software602 Groupware Server 6 3.1 from the list of additional server types and click Next.
6. Enter all details from the [Outlook Connector Configuration](#) section.
7. Click OK to finish.

Outlook 2007

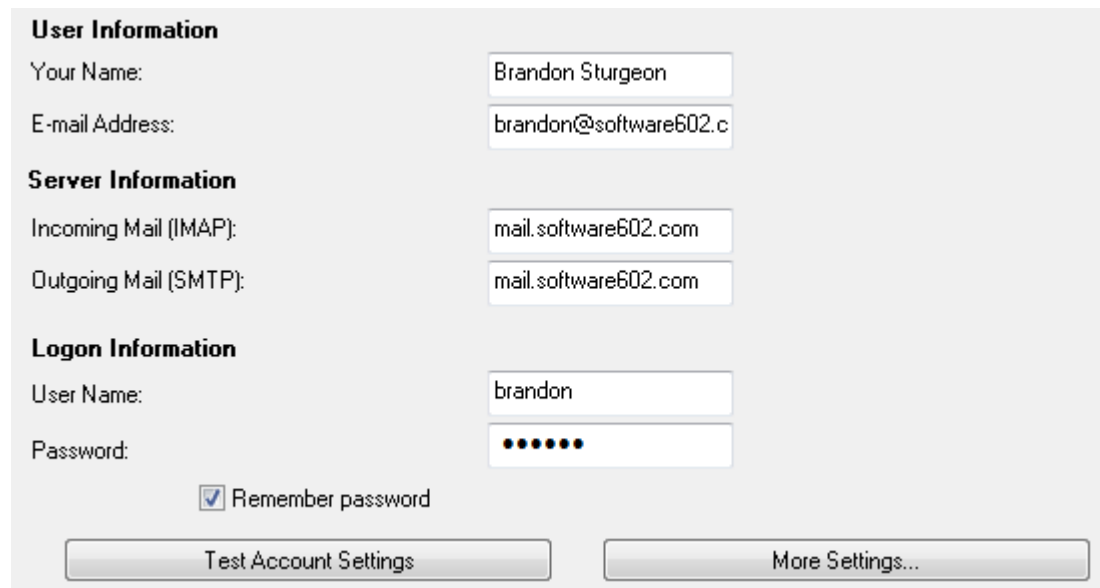
1. Open Control Panel -> Mail.
2. Click the Show profiles... button.
3. Click Add... and you will be prompted for a profile name, enter Groupware and click OK.
4. Select the Manually configure server settings or additional server types option and click Next.
5. Select Other, click Outlook Connector for Software602 Groupware Server 6 3.1 and then click Next.



6. Enter all details from the [Outlook Connector Configuration](#) section.
7. Click Finish.

Outlook Connector Configuration

The following sections describe the configuration settings for the Outlook Connector regardless of the version of Outlook installed. These properties define account information and the connection type used to contact the Software602 Groupware Server over the network. This information should be provided by your Groupware Administrator.



The screenshot shows the Outlook Connector Configuration dialog box with the following fields and options:

- User Information**
 - Your Name: Brandon Sturgeon
 - E-mail Address: brandon@software602.c
- Server Information**
 - Incoming Mail (IMAP): mail.software602.com
 - Outgoing Mail (SMTP): mail.software602.com
- Logon Information**
 - User Name: brandon
 - Password: [masked with 6 dots]
 - Remember password
- Buttons: Test Account Settings, More Settings...

- **User Information:** The user's full name and e-mail address.
- **Server Information:** The IMAP and SMTP server address to the Software602 Groupware Server. These addresses can either be in the form of a Fully Qualified Domain Name (FQDN) or by IP Address. If you are uncertain of these settings, contact your Groupware Administrator.
- **Logon Information:** The Software602 Groupware Server user account and password. To synchronization with a mobile device, it is recommended to create a separate account/profile and login using the alternative mobile login (e.g. if your login is **bob**, use **bob_mobile**).

Once all information has been entered, click the `Test Account Settings` button to verify the connection to the Software602 Groupware Server.

Click the `More Settings...` button to access advanced Outlook Connector settings.

General

The screenshot shows the 'General' tab of a configuration window. At the top, there are several tabs: 'General', 'Connections', 'Folders', 'Send/Receive', 'Miscellaneous', 'Format', and 'About'. The 'General' tab is selected. Below the tabs, there are two sections: 'Display Information' and 'Other User Information'. In the 'Display Information' section, the 'Display Name' is set to 'Groupware Server'. In the 'Other User Information' section, the 'Organization' is set to 'Software602, Inc.'.

- **Display Information:** This is how the account will be shown the folder list. It can be changed to a name of your choice. By default it is `Groupware Server`.
- **Other User Information:** This field is optional.

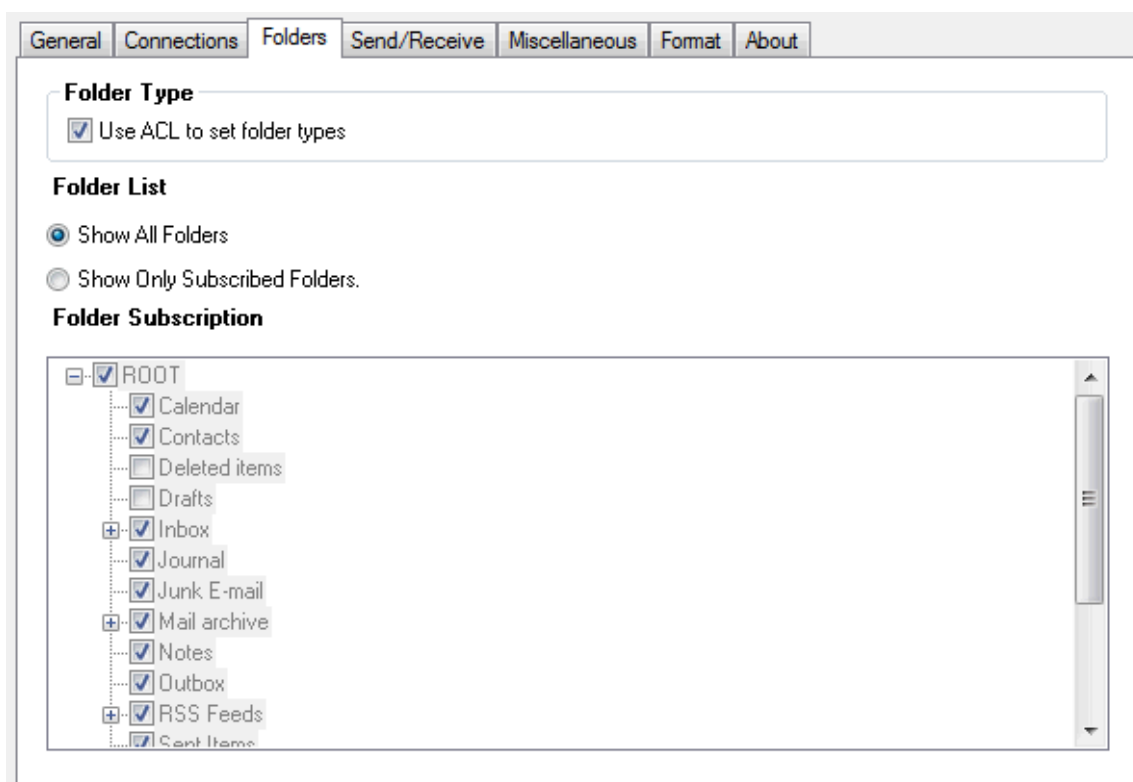
Connections

The screenshot shows the 'Connections' tab of a configuration window. At the top, there are several tabs: 'General', 'Connections', 'Folders', 'Send/Receive', 'Miscellaneous', 'Format', and 'About'. The 'Connections' tab is selected. Below the tabs, there are three main sections: 'Incoming Server (IMAP)', 'Outgoing Server (SMTP)', and 'SMTP Authentication'.
1. **Incoming Server (IMAP):** Includes checkboxes for 'Use secured connection (SSL)' (checked) and 'Use Persistent Connection' (checked). The 'Port' is set to '993'.
2. **Outgoing Server (SMTP):** Includes checkboxes for 'Use secured connection (SSL)' (checked), 'Use Transport Layer Security (TLS)' (unchecked), and 'Auto Registration Port' (checked). The 'Port' is set to '465'. There is also a 'Use SSL' checkbox (unchecked) and a 'Server timeout value in number of seconds' field set to '60'.
3. **SMTP Authentication:** Includes checkboxes for 'SMTP server requires authentication' (checked), 'Use Same Authentication As Incoming Server' (selected), and 'Use SMTP Authentication' (unchecked). Below this are fields for 'User Name:' and 'Password:', and a 'Remember password' checkbox (unchecked).

- **Incoming Server (IMAP):** Enable the `Use secured Connection (SSL)` option to provide IMAP connectivity over Secure Sockets Layer (SSL). This option will change the port to 993. Enable the `Use Persistent Connection` unless otherwise instructed by your Groupware Administrator. A persistent connection is recommended as it provides better performance since the authentication process is only performed once. Disable persistent connections when there are large numbers of clients connecting simultaneously to the Software602 Groupware Server.

- **Outgoing Server (SMTP):** These options allow you to configure the level of security used by the Outlook Connector when sending e-mail. Enable the `Use secured connection (SSL)` to send e-mail via the SSL SMTP. This option requires the SSL SMTP server to be enabled on the Software602 Groupware Server. `Use Transaction Layer Security (TLS)` is not support by the Software602 Groupware Server.
- **SMTP Authentication:** This must be used when the Software602 Groupware Server SMTP server requires authentication before it will accept e-mail. Enable `SMTP server requires authentication` and choose the authentication method. The default is to use the same user name and password used to access the IMAP server.
- **Timeout Setting:** This is the number of seconds that the Outlook Connector will wait for a response before timing out. It is recommended that this value be set to 60.

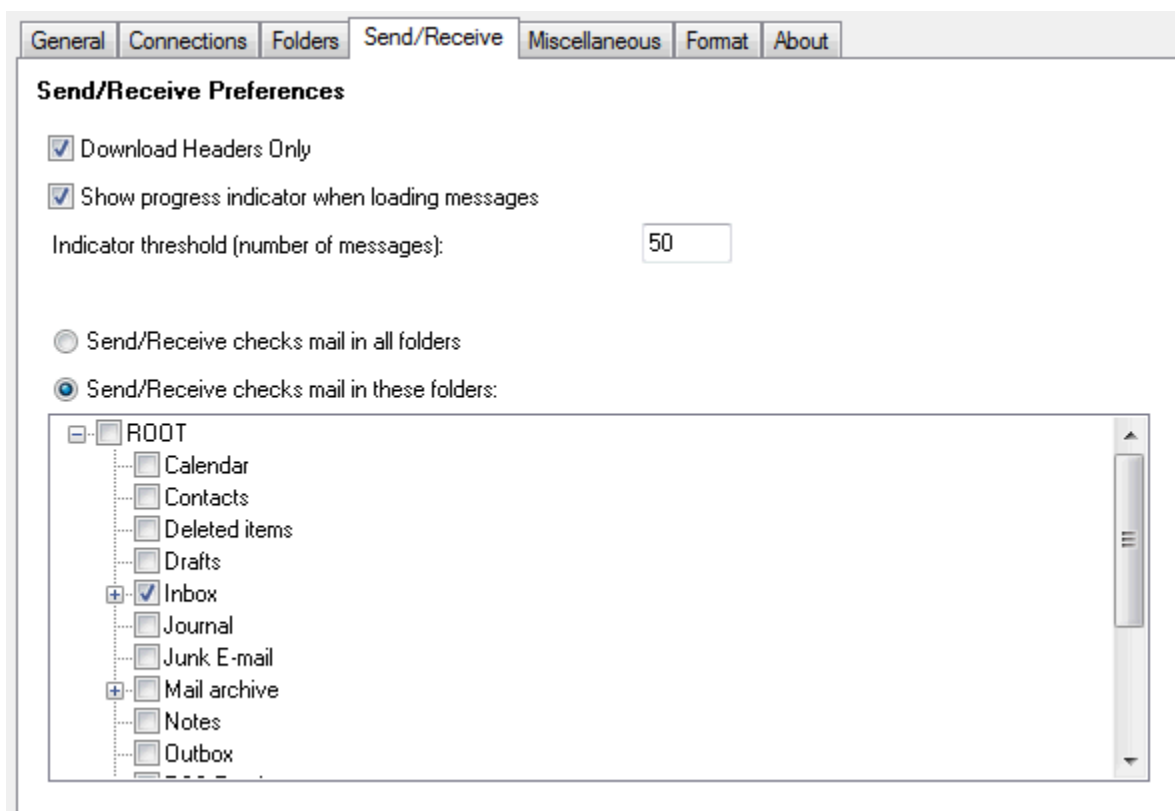
Folders



- **Folder Type:** This option enables the Outlook Connector to use custom IMAP folder ACLs to specify the folder types used by Outlook (Appointment, Contact, Task, Journal, Notes, and Mail).
- **Folder List:** The `Show All Folders` option is enabled by default and tells the connector to automatically subscribe to all folders found on the IMAP server. The option `Show Only Subscribed Folders` should be used in environments when there are a large amount of folders on the server, but they are not all needed by most users. This will allow the user to individually select only the specific folders they would like to see in Outlook.

NOTE: Do not unsubscribe the default Outlook folders (Calendar, Contacts, Deleted Items, Drafts, Journal, Sent Item, Notes, Outbox and Tasks). If these folders are not subscribed, Outlook will automatically recreate these folders on the server.

Send/Receive



- **Download Headers Only:** This option is enabled by default for performance reasons. Downloading headers allows the Outlook Connector to build the message list for Outlook faster than if it had to download the complete message. Once the message is selected for viewing, then the entire message is downloaded.
- **Show progress indicator when loading messages:** Allows you to configure the status indicator when sending and receiving messages. The default *Indicator threshold (number of messages)* is 50 messages. Any folder with less than 50 messages will not show the Outlook Connector status indicator.
- **Send/Receive checks mail in all folders:** All folders are checked for new messages.
- **Send/Receive checks mail in these folders:** Only the selected folders are checked.

Miscellaneous

The screenshot shows the 'Miscellaneous' tab in an Outlook settings window. It contains two sections: 'Message Receipt Options' and 'Local Cache Options'. Under 'Message Receipt Options', there are three radio buttons: 'Prompt me before sending a response' (selected), 'Always send a response', and 'Never send a response'. Under 'Local Cache Options', there are two radio buttons: 'Default Location' (selected) and 'Custom Location'. Below the radio buttons is a text box containing the path 'C:\Users\brandon\AppData\Roaming\Software602\Outlook Connector for 602LAN SUITE Groupware\Accounts\[', and a 'Browse' button to its right.

- **Message Receipt Options:** The option `Prompt me before sending a response` will notify you when a read receipt is requested and you can decide whether to send it or not. `Always send a response` will send a read receipt whenever one is requested. `Never send a response` will never send a read receipt whenever one is requested.
- **Local Cache Options:** The `Default Location` of the local cache is:

```
%HOME%\Application Data\Software602\Outlook Connector for Software602 Groupware Server\Accounts\[outlook profile name]\[email address]\Localcache.db
```

Example:

```
C:\Documents and Settings\Bob\Application Data\Software602\Outlook Connector for Software602 Groupware Server\Accounts\Groupware\bob@domain.com\LocalCache.db
```

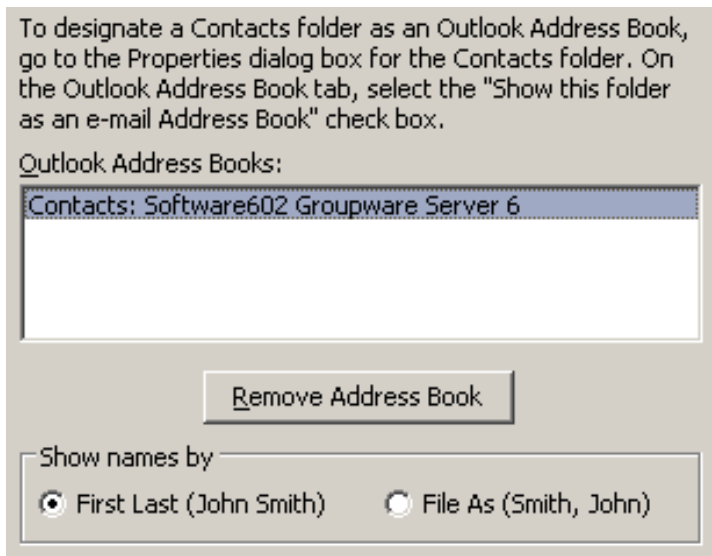
The `Custom Location` provides a way to override the default location.

NOTE: Please ensure that users have permission (read, write, delete, change) to access the drive location where the local cache is stored.

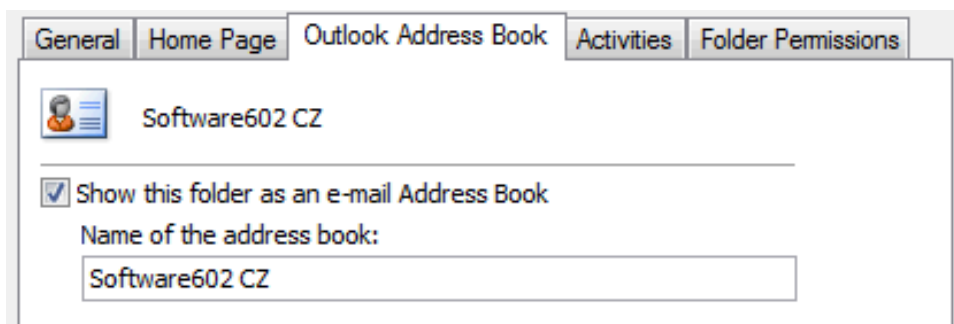
Address Book

The Outlook Connector provides complete access to contacts stored within Software602 Groupware Server. To use e-mail addresses stored as Groupware Contacts in Outlook, the following conditions must be met:

- The Outlook Address Book service must be added under Directories and Address Books in Microsoft Outlook.



- Contact folders on Groupware Server you would like to use for addressing messages in Outlook (e.g. Contacts and Shared Contacts folders) must have the Show this folder as an e-mail Address Book option on the Outlook Address Book tab enabled.

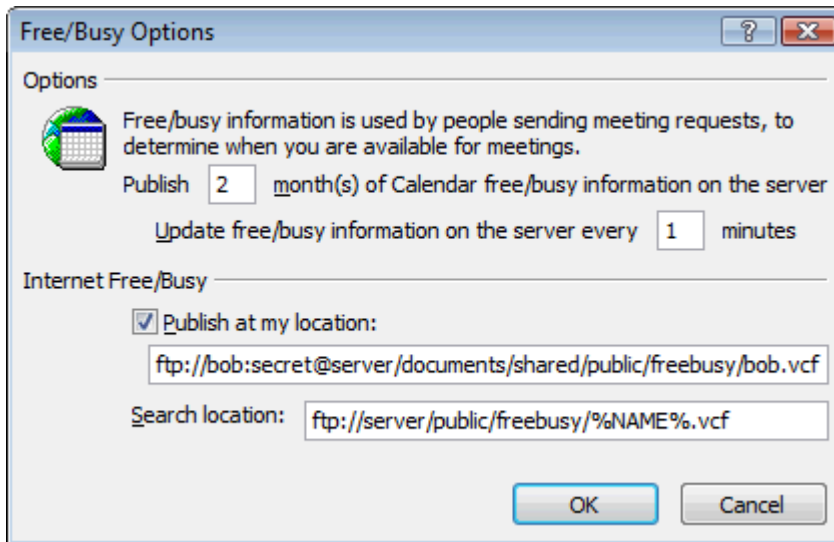


Free/Busy

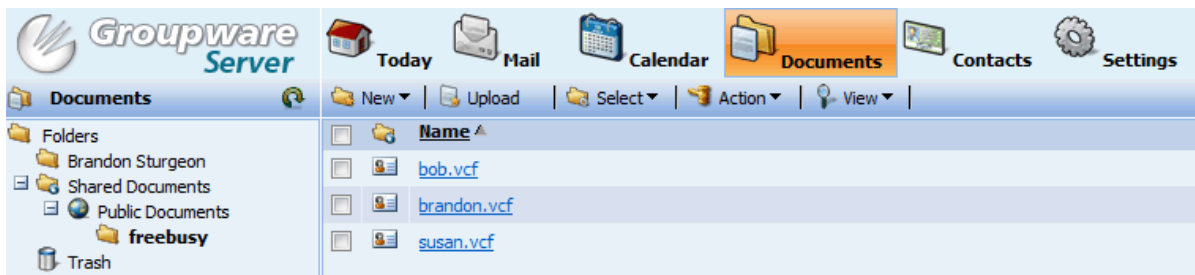
Outlook provides the tools for users to share free/busy information from their Calendars with other users. You can learn more about this feature from the [Microsoft Knowledge Base](#).

To configure Free/Busy with Groupware Server, do the following:

1. Select Tools-> Options-> Calendar Options. Under Advanced options, uncheck When sending meeting requests over the Internet, use iCalendar format.
2. Click the Free/Busy Options... button.
3. Enter the following information:
 - **Options:** You can choose how often and for how long free/busy information is valid.
 - **Publish at my location:** This option must be checked. Enter the FTP address as well as the username and password. Example:
<ftp://user:password@server/documents/shared/public/freebusy/user.vcf>
 - **Search Location:** Enter the URL for the free/busy times of the shared Internet location. Example: <ftp://server/public/freebusy/%NAME%.vcf>
4. Click OK to apply the settings.



This is how the shared calendar will look in the Groupware Server web interface:



NOTE: Outlook supports %NAME% and %SERVER% variable substitutions (e.g. ftp://%SERVER%/Freebusy/%NAME%.vfb). In an SMTP address, Outlook replaces %NAME% with all the characters before the at (@) symbol and replaces %SERVER% with all the characters following the @ symbol.

ActiveSync

ActiveSync allows you to synchronize mail between Outlook and Windows Mobile enabled devices. You learn more about ActiveSync from the following URL:

<http://www.microsoft.com/windowsmobile/activesync/default.aspx>

To ensure that your mobile device is synchronized with Groupware, you will need to configure Outlook to deliver new mail to the Groupware account in the Outlook.

Outlook 2002/2003

1. Open Microsoft Outlook.
2. Click `Tools` -> `E-mail Accounts`.
3. Click `Next`.
4. Change the `Deliver new e-mail to the following location` option to your Groupware account.
5. Click `Finish` to save your settings.

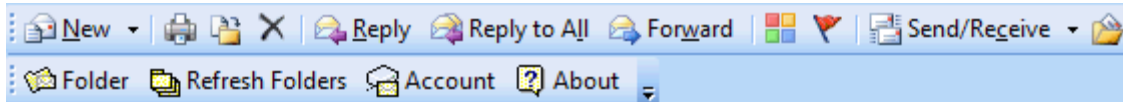
Outlook 2007

1. Open Microsoft Outlook.
2. Click `Tools` -> `Accounts Settings`
3. Select the Groupware account and click `Set as Default`.
4. Click `Close`.

Usage

Refresh Folders

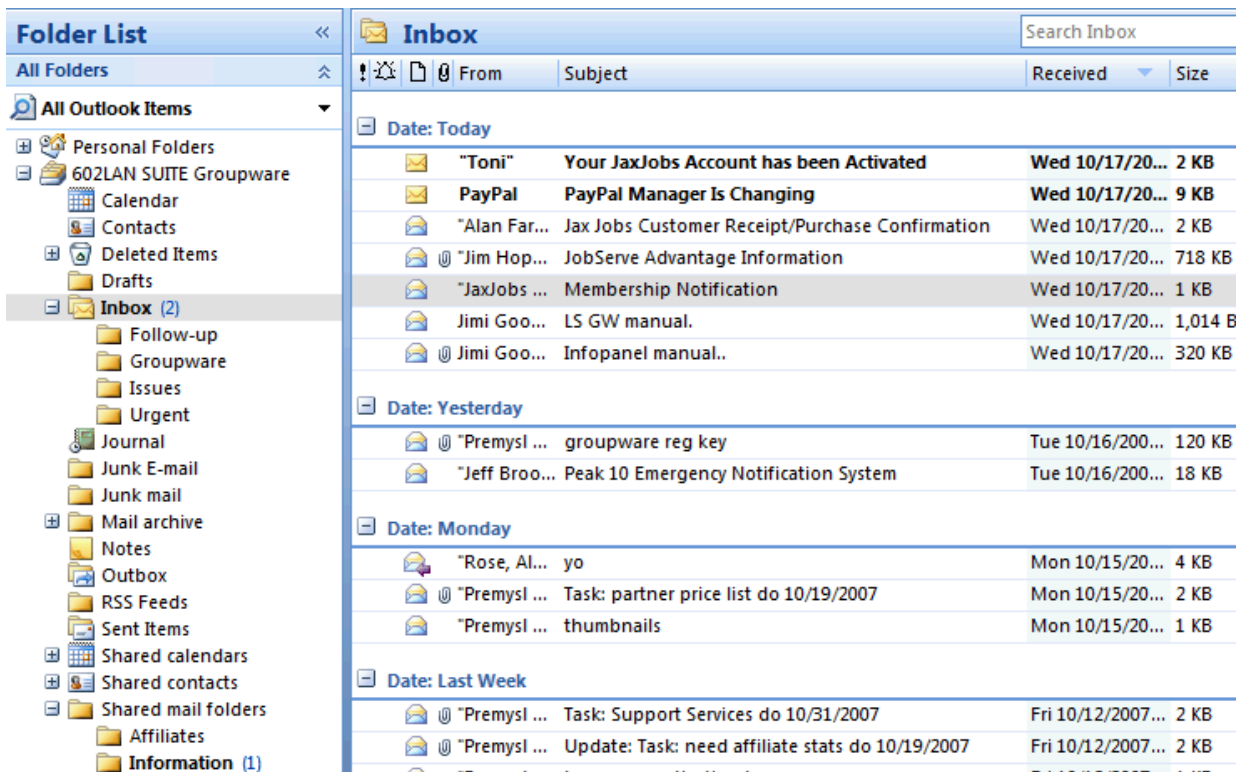
To refresh the folder list within Outlook, simply press the `Refresh Folders` button on the Outlook Connector toolbar. This is useful when a new folder is created on the server from another mail client, such as the web-based Groupware Client, or if you have recently received permissions to view the contents of a shared folder.



NOTE: Restarting Outlook will automatically refresh the folder list.

E-mail

After opening Outlook, the `Software602 Groupware Server` account folder tree is added to the left column. You will notice that the inbox folders and shared mail folders are identical to the folder layout on the web-based Groupware client.



NOTE: It can take several minutes for Outlook to synchronize with the Groupware server for the first time. If your folders do not appear right away, be patient.

Calendar

Calendar sharing is available to all users. This feature makes it possible for managers and coordinators to be up-to-date in regards to the current workload of their subordinates and co-workers. Events within a shared calendar are visible and can be edited, provided the user has the proper permissions.

Calendars also provide notifications for scheduled meetings and events, and can also be configured to notify the user in advance of an event.

In Outlook, you have both your personal calendar and all shared calendars at your disposal. You can create events in Outlook and synchronize them with the server or create events using the web-based Groupware Client and synchronize them with Outlook. Likewise, an event created in Outlook can be edited via the web interface and vice-versa.

Tasks

Creation and completion of various work assignments is a routine task of every working day. That is why it is important to have a good overview of your currently assigned tasks.

In electronic format, you can assign tasks quickly and easily. An arbitrary task can be assigned to a selected colleague or team. Using the iCalendar standard, it is possible to receive and assign tasks through Microsoft Outlook.

Contacts

In Software602 Groupware Server, a contact is a database record describing a person or an organization. It can contain a wide range of contact information, from an e-mail address and telephone number to a birthday or anniversary. Contacts can be shared or made private and only available to the user who created the contact record.

FAQ

Q: I do not see any items in any address book under my Groupware account, or the address book is not syncing with the Groupware server.

A: Make sure that Outlook is not running in offline mode: `File -> Work Offline`.

Q: It seems that I have installed and set everything correctly but the Outlook Connector does not behave correctly.

A: Make sure that you are a member of the `Outlook Connector Users` group on the Groupware server. You will need to contact your Administrator to be added to this group.

Q: How do I synchronize only certain folders from Software602 Groupware Server to Outlook or from Outlook to Software602 Groupware Server?

A: If you would like to synchronize only certain folders to Outlook, you need to change how the Outlook Connector sends and receives mail. See the section on [Outlook Connector Configuration](#) on the `Send/Receive` tab (select the relevant folders).