

MDaemon GroupWare

plugin for Microsoft Outlook

Collaborate Using Outlook and MDaemon

Version 1 – User Manual

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Table of Contents

Table of Contents	3
MDaemon GroupWare.....	4
Introduction.....	4
Requirements	4
Installation	4
Downloading the MDAemon GroupWare Plugin.....	5
Installing the MDAemon GroupWare Plugin.....	5
Configuring the MDAemon GroupWare Plugin for Microsoft Outlook.....	6
Using the MDAemon GroupWare Wizard	6
Creating an MDAemon GroupWare Mailbox Manually	7
Choosing a Personal Storage File	8
Sharing Outlook Items and Folders	9
Outlook's Folder List and MDAemon GroupWare	9
IMAP Accounts.....	9
POP Accounts	9
Creating Folders	9
Sharing Outlook Item Folders	10
Synchronizing Your Shared Folders	11
Help with Microsoft Outlook.....	12
Index.....	13

MDaemon GroupWare Plugin for Microsoft Outlook

Version 1.0.6 - User Manual

Introduction

Because of the large amount of time it can take to schedule appointments, work with email, manage your contacts, and the like, being able to collaborate with your co-workers and colleagues easier can save you time and greatly increase your productivity. MDAemon® GroupWare Plugin for Microsoft Outlook can help you accomplish that goal.

MDaemon® GroupWare Plugin for Microsoft Outlook makes it possible for you to share your calendars, contacts, and other Microsoft Outlook items with other MDAemon GroupWare users. The GroupWare plugin provides Outlook item sharing by enabling Microsoft Outlook to use special IMAP folders located on your MDAemon GroupWare enabled server. These folders can be configured to store whatever type of Outlook items that you designate: calendars, contacts, notes, tasks, and so on. Further, for each of these folders you can grant multiple levels of access permission to other MDAemon GroupWare users. For example, to one user you might wish to grant permission to read one of your calendars but not add items to it, but to another you might wish to grant complete access that is equivalent to your own. When you grant an MDAemon GroupWare user permission to see one of your folders it will appear in his or her Outlook Folder List, and the folders to which you have been granted access will appear in yours.

Thus the MDAemon® GroupWare Plugin for Microsoft Outlook can help you to improve your efficiency by allowing you to share your Outlook items and collaborate with your colleagues directly using the productivity features built in to Outlook.

Requirements

MDaemon® GroupWare Plugin for Microsoft Outlook requires Microsoft Windows 9x or later, and Microsoft Outlook 98 or later must be installed on your system. Further, an Internet or other network connection is required in order to connect to the MDAemon mail server that is hosting your mail services, and that server must be MDAemon GroupWare enabled. Finally, permission to use MDAemon GroupWare must be enabled for your specific MDAemon user account—only GroupWare enabled accounts residing on the same mail server can share Outlook items via GroupWare.

Installation

MDaemon® GroupWare Plugin for Microsoft Outlook is available as a stand-alone installer that can be downloaded from WorldClient, MDAemon's web-based email client. If you do not have access to WorldClient then contact your supervisor or email administrator to obtain the plugin by some other means, such as on a disk or via an alternate download location.

Downloading the MDAemon GroupWare Plugin

To download MDAemon® GroupWare Plugin for Microsoft Outlook from within WorldClient:

1. Open your web browser to WorldClient's sign-in page. In most cases, the address of the sign-in page is something like, "http://www.example.com" or "http://worldclient.example.com:3000."
2. Type your email address and password in the spaces provided, and click **Sign In** to sign in to your WorldClient account.
3. Click **Options** (or click the Options button if the WorldClient theme you are using has buttons instead of text links).
4. Click **GroupWare**.
5. Click **Download the MDAemon GroupWare Plugin for Outlook**.
6. Download OutlookPluginInstall.exe taking note of the folder to which you save it.



Installing the MDAemon GroupWare Plugin

To install MDAemon® GroupWare Plugin for Microsoft Outlook:

1. Close Microsoft Outlook if it is running. It is also recommended that you exit all other Windows applications that you may have running before continuing with the installation.
2. Click **Start**, and then click **Run...** on the Windows start menu.
3. In **Open**, type the path to OutlookPluginInstall.exe, or click **Browse...** to locate it.

4. Click **OK**.
5. Click **N**ext.
6. Read the License Agreement and then click **I** Agree to continue with the installation.
7. Click **N**ext.
8. Click **F**inish.

Configuring the MDAemon GroupWare Plugin for Microsoft Outlook

Using the MDAemon GroupWare Wizard

The first time you launch Microsoft Outlook after installing the MDAemon® GroupWare Plugin, the MDAemon GroupWare Wizard will be displayed. Use this wizard to create your MDAemon GroupWare mailbox within Outlook. Before continuing with the wizard, however, there are a few things you will need to know: the host name of your MDAemon GroupWare enabled mail server (usually something like `mail.example.com`), your login name (usually your email address), and your password. When you are prepared to continue with the MDAemon GroupWare wizard:

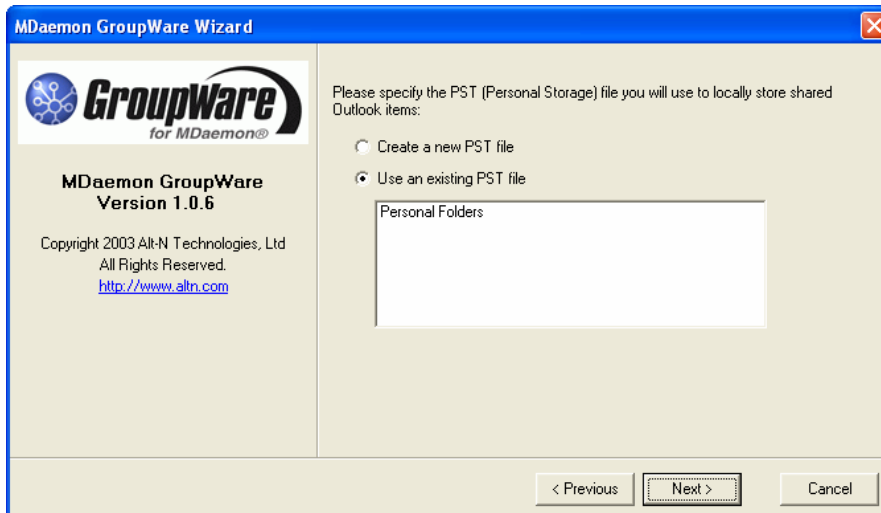
1. Read the first screen and click **N**ext.



2. Enter the *Hostname* of the GroupWare enabled mail server hosting your account.
3. Leave the *Port* set to the default value of **143** unless you have been instructed by your email administrator to set it to an alternate value.
4. Enter the *Login* and *Password* of your GroupWare enabled MDAemon account.
5. Click **Remember Password** if you want the GroupWare plugin to save your password and thus log in to your account automatically in the future. Clear

the check box if you wish to reenter your password each time you launch Outlook.

6. Click **Test connection** to test your settings. If you encounter any errors during the test then contact your email administrator for help.
7. Click **Next**.

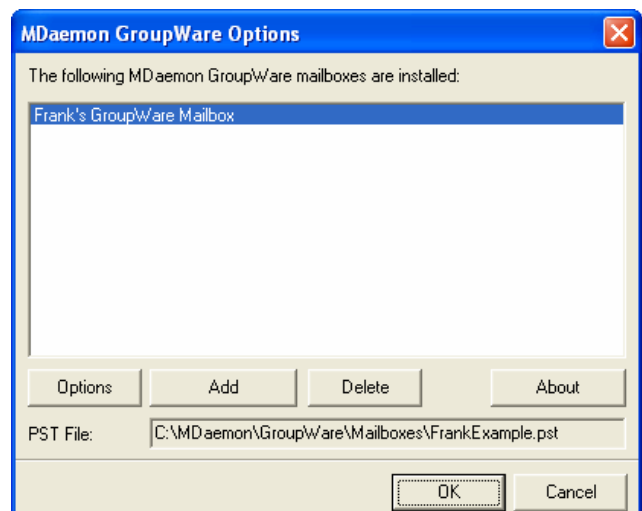


8. A PST (personal storage) file will be used for the shared Outlook items that are stored locally. Click **Create a new PST file** if you wish to create a new one, or, if you wish to use one that already exists, click **Use an existing PST file** and then click the file that you wish to use. If you are not sure which option to choose, see *Choosing a Personal Storage File*—page 8.
9. Click **Next**.
10. Click **Finish**.

Creating an MDAemon GroupWare Mailbox Manually

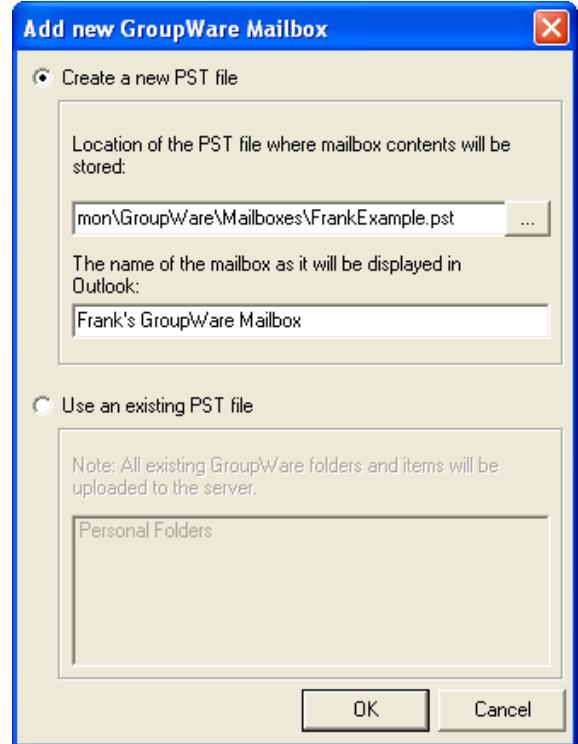
If you choose to bypass the MDAemon GroupWare Wizard, you can also create MDAemon GroupWare Mailboxes manually within Outlook. To do so:

1. Click **GroupWare Mailboxes** on the GroupWare toolbar. If you do not see the GroupWare toolbar then click **View→Toolbars→MDaemon GroupWare** to activate it. Alternatively, you can also reach the MDAemon GroupWare Mailboxes screen on Outlook's Options dialog (**Tools→Options→MDaemon GroupWare**).
2. Click **Add**.
3. A PST (personal storage) file will be used for the shared Outlook items that are stored locally. Click **Create a new PST file** if you wish to create a new one. If you wish to use a PST file that already exists, click



Use an existing PST file, click the file that you wish to use, and then Skip to *Step 6* below. If you are not sure which option to choose, see *Choosing a Personal Storage File*—page 8.

4. Type a filename for your new PST file, or accept the default one that is generated automatically.
5. Enter a name for your GroupWare mailbox. This is the name that will be displayed in your Outlook Folder List and is purely for your reference—it will not be visible to other users.
6. Click **OK**.
7. Enter the *Hostname* of the GroupWare enabled mail server hosting your account.
8. Leave the *Port* set to the default value of **143** unless you have been instructed by your email administrator to set it to an alternate value.
9. Enter the *Login* and *Password* of your GroupWare enabled MDAemon account.
10. Click **Remember Password** if you want the GroupWare plugin to save your password and thus log in to your account automatically in the future. Clear the check box if you wish to reenter your password each time you launch Outlook.
11. Click **Test connection** to test your settings. If you encounter any errors during the test then contact your email administrator for help.
12. Click **OK** and **OK**.



Choosing a Personal Storage File

Your shared Outlook item data is stored on your GroupWare enabled mail server in special IMAP folders. However, Outlook also synchronizes and stores this shared data locally in personal storage (PST) files. Whether creating a GroupWare mailbox manually or by using the MDAemon GroupWare Wizard, you must choose whether to create a new PST file or use one that already exists. If you are not sure which option to choose, here are some guidelines to help you decide:

- If you do not already have an email account or GroupWare mailbox configured within Outlook, choosing to create a new PST file is probably the best option.
- If you already have an existing IMAP email account configured within Outlook, a new PST file may be best.
- If you have an existing POP account in Outlook that is associated with an existing PST file, then selecting the associated PST file may be your best choice.

- If an Outlook email account exists (whether POP or IMAP) and you are already using some Outlook items (calendars, contacts, and so on), then using the existing PST file may be your best option.

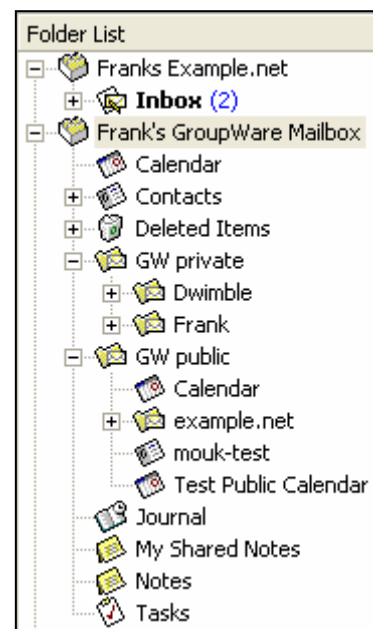
Sharing Outlook Items and Folders

Outlook's Folder List and MDAemon GroupWare

The content of your Outlook Folder List depends on the types of email accounts that you have configured within Outlook: POP or IMAP.

IMAP Accounts

IMAP email accounts are displayed as separate mailboxes containing only your IMAP email folders. Folders containing shared Outlook items cannot be displayed in this IMAP account's list. GroupWare Mailboxes will be displayed separately even if they are associated with the same account information as the IMAP account on your MDAemon server. For example, if you have an IMAP account in Outlook for frank@example.net then a mailbox will appear for that account in the Outlook Folder List. It will contain an Inbox and any other IMAP email folders that you have created for it. It will not, however, contain any shared Outlook item folders such as calendars, contacts, and the like—even if you have created an MDAemon GroupWare mailbox using the same frank@example.net login information. The GroupWare mailbox will be displayed separately in the Folder List, and will contain your shared Outlook items. It may be associated with the folders under *Outlook Today*, or with another list of folders entirely, depending on which PST file it is associated with.



POP Accounts

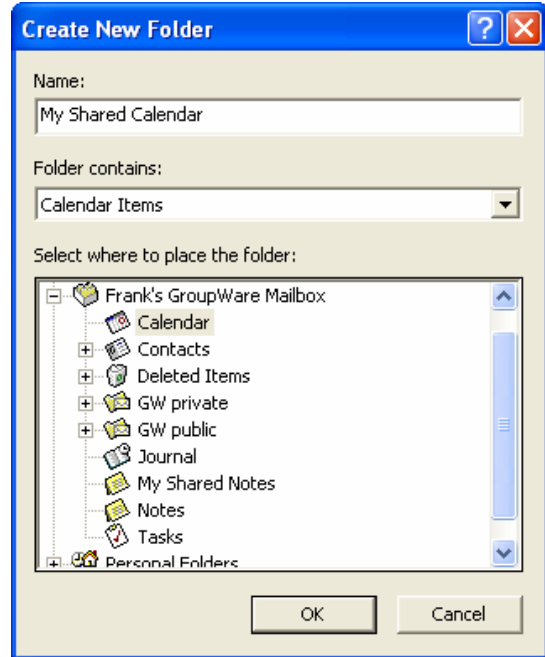
Typically a POP email account will have its email deposited into the Inbox or other email folders located under *Outlook Today* in the Folder List. This list of folders can be associated with a GroupWare Mailbox and thus contain both shared Outlook items folders and email folders.

Creating Folders

You can create folders and subfolders in any mailbox listed in Outlook's Folder List. When you create a new folder you will designate the type of items that will be associated with it: mail, calendars, contacts, tasks, notes, and so on. Your IMAP account mailboxes, however, can only contain mail items (i.e. email folders)—they cannot contain other Outlook items such as calendars and contacts. Folders for those Outlook items can be created in your GroupWare Mailboxes. Thus your IMAP email folders and shared Outlook items will always be listed in different sections of the Folder List.

To create a new folder in the Outlook Folder List:

1. In the Folder List, right-click the mailbox or folder where you want the new folder to be placed, and click **New Folder**. Alternatively, click **File→New→Folder** from Outlook’s menu bar.
2. Type a *Name* for your folder.
3. In *Folder Contains*, choose the type of Outlook item that the folder will contain: Calendar, Contact, Journal, Task, Mail, and so on. IMAP email mailboxes may only contain mail items.
4. Choose the location where you want the folder to be placed (if you didn’t already choose the location in step 1, or if you want to choose a different location).
5. Click **OK**.

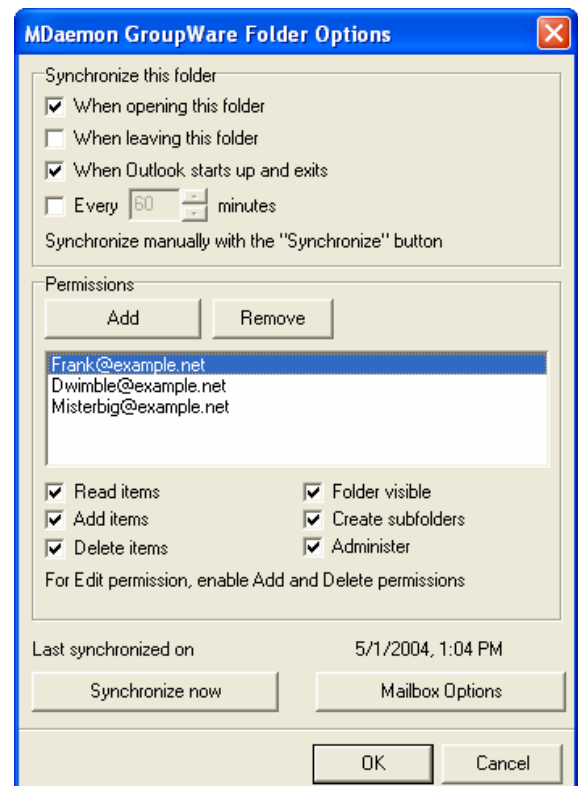


Sharing Outlook Item Folders

You can use the MDaemon GroupWare Plugin to share your GroupWare Mailbox folders with other MDaemon GroupWare users. You can designate which users will be able to access them, and the level of access that will be permitted.

To share a non-mail Outlook item folder:

1. In the Folder List, click the folder that you wish to share, and then click **Folder** on the GroupWare toolbar. Alternatively, right-click the folder, click **Properties**, and then click **MDaemon GroupWare Folder**.
2. Choose the synchronization options that you wish to use for the folder—how often GroupWare will synchronize the local copy of the folder with the copy residing on the mail server. You have five synchronization options:
 - *When opening this folder*—the local and server copies will be synchronized every time you select the folder in your Folder List.
 - *When leaving this folder*—the local and server copies will be synchronized every time you leave the folder (i.e. move to another folder).
 - *When Outlook Starts and Exits*—the folder will be synchronized when you first launch Outlook, and when you close it.
 - *Every XX minutes*—the folder will be synchronized automatically at regular intervals according to the number of minutes you specify.
 - *Manually with the “Synchronize” button*—any



shared folder can be synchronized at any time by clicking **Synchronize** on the GroupWare toolbar. **Note:** if you leave all of the other options cleared then this is the only way that a folder can be synchronized.

3. In the Permissions section, click **Add** to specify a user with which to share the folder.
4. Choose the desired user from the drop-down list box or type one in manually. Depending on how your email administrator has configured your mail server, the list box will contain one of the following: all GroupWare enabled MDAemon accounts on your server regardless of domain, only GroupWare enabled accounts that belong to the same domain as you, or no addresses at all. If all of the addresses are hidden then you will have to manually enter each GroupWare enabled email address that you wish to share the folder with. Click **OK**.
5. Click the user in the permissions list and then click the boxes corresponding to the access rights that you wish to grant:
 - **Read items**—the user is permitted to see the contents of the shared folder (i.e. see the calendars, contacts, and the like).
 - **Add items**—new items can be posted to the shared folder. Note: if you want the user to be able to edit items in the folder then both *Add items* and *Delete items* permission must be given.
 - **Delete items**— items contained in the folder can be deleted by the user. Note: if you want the user to be able to edit items in the folder then both *Add items* and *Delete items* permission must be given.
 - **Folder visible**— causes the shared folder to appear in the user's Folder List. **Note:** If this option is not enabled then the user will not be able to see the shared folder regardless of the other access rights given.
 - **Create subfolders**— the user can create subfolders.
 - **Administer**—the user has full permissions for the folder. He or she can add, delete, and modify the folder and all items that it contains.
6. Click **Synchronize** if you wish to synchronize this folder immediately.
7. Click **Mailbox Options** if you need to edit the GroupWare Mailbox's settings.
8. Click **OK**.

Synchronizing Your Shared Folders

Shared Outlook items are created and edited on your local computer and then synchronized with the copies that reside on the MDAemon GroupWare server. Shared folders must be synchronized before others can see any changes that you have made to the shared Outlook items, and before you can see any changes that they have made. You can synchronize your shared folders manually, and you can configure them to be synchronized automatically. You can also configure distinct synchronization settings for each shared folder. Thus one folder could be set to synchronize every 5 minutes while another could be set to synchronize only when you manually click the *Synchronize* button.

To configure the synchronization settings for a shared Outlook item folder:

1. In the Folder List, click the folder that you wish to synchronize, and then click **Folder** on the GroupWare toolbar. Alternatively, right-click the folder, click **Properties**, and then click **MDaemon GroupWare Folder**.
2. Choose the synchronization options that you wish to use for the folder. You have five synchronization options:
 - *When opening this folder*—the local and server copies will be synchronized every time you select the folder in your Folder List.
 - *When leaving this folder*—the local and server copies will be synchronized every time you leave the folder (i.e. move to another folder).
 - *When Outlook Starts and Exits*—the folder will be synchronized when you first launch Outlook, and when you close it.
 - *Every XX minutes*—the folder will be synchronized automatically at regular intervals according to the number of minutes you specify.
 - *Manually with the "Synchronize" button*—any shared folder can be synchronized at any time by clicking **Synchronize** on the GroupWare toolbar. **Note:** if you leave all of the other options cleared then this is the only way that a folder can be synchronized.
3. Make any necessary changes or additions to the permissions section.
4. Click **Synchronize** if you wish to synchronize the folder immediately.
5. Click **OK**.

Help with Microsoft Outlook

For specific instructions on working with Outlook items such as calendars, contacts, tasks, and so on, and for instructions on using Microsoft Outlook's many other features, see Outlook's extensive help system and documentation.

Index

A

Access Rights, 10

C

Configuring the MDAemon GroupWare Plugin, 6
Creating Folders, 9
Creating GroupWare mailboxes manually, 7

D

Downloading the GroupWare Plugin, 5

E

Email Address, 6

F

Folders, 9

G

GroupWare Port, 6

H

Hostname, 6

I

IMAP Accounts, 9
IMAP Folders, 9
Installation, 4
Installing the MDAemon GroupWare Plugin, 5
Introduction, 4

L

Logging in to WorldClient, 5
Login, 6

M

MDaemon GroupWare Wizard, 6

O

Obtaining the GroupWare Plugin, 4
Outlook items, 9
Outlook's Folder List, 9
Overview, 4

P

Password, 6
Permissions, 10
Personal Storage Files, 6, 8
POP Accounts, 9
PST files, 6, 8

R

Requirements, 4

S

Sharing Folders, 10
Sharing Outlook Items, 10
Sharing Outlook Items and Folders, 9
Signing in to WorldClient, 5
Specifying the GroupWare Enabled Server, 6
Synchronization Methods, 10, 11
Synchronizing your shared folders, 11

U

Using the MDAemon GroupWare Wizard, 6

W

WorldClient, 5