

# ***Zimbra Connector for Microsoft Outlook User Guide***

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This guide is intended to help transition existing Schafer employees and new Schafer employees as they begin using the Zimbra Connector with Microsoft Outlook as their primary email client.

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## What is the Zimbra Connector for Microsoft Outlook (ZCO)?

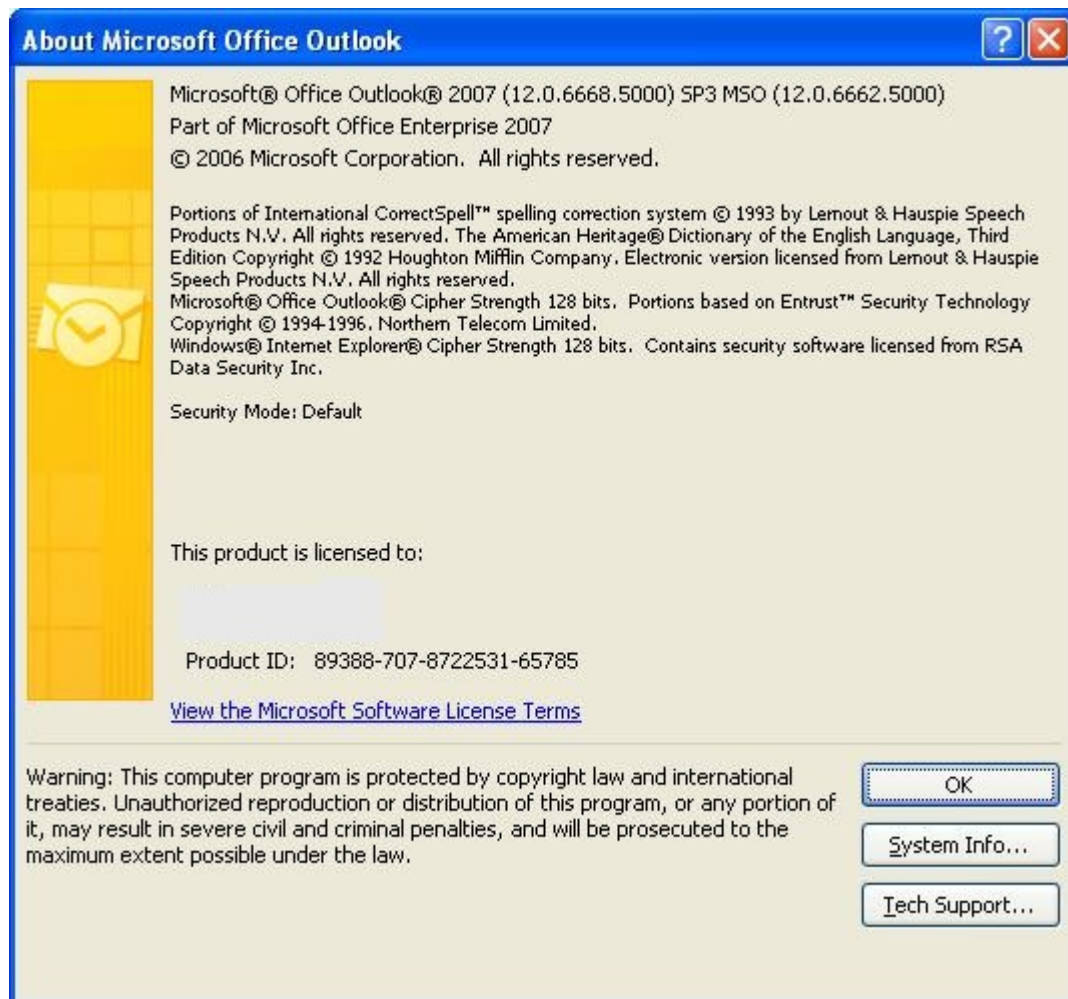
The **Zimbra Connector for Microsoft Outlook (ZCO)** provides real time two-way synchronization of mail, contacts, tasks, and calendars between Outlook and the Zimbra server. With ZCO and Zimbra, users may delegate access and have granular control of folder and sub-folder sharing. Plus, users and their delegates have access to shared content offline. Previous users of Microsoft Outlook with a Microsoft Exchange server will find that functionality is very similar to Exchange, but with several key differences that will be outlined in this guide for Office 2007 and Office 2010 versions of Outlook.

## How do I install the Zimbra Connector for Microsoft Outlook?

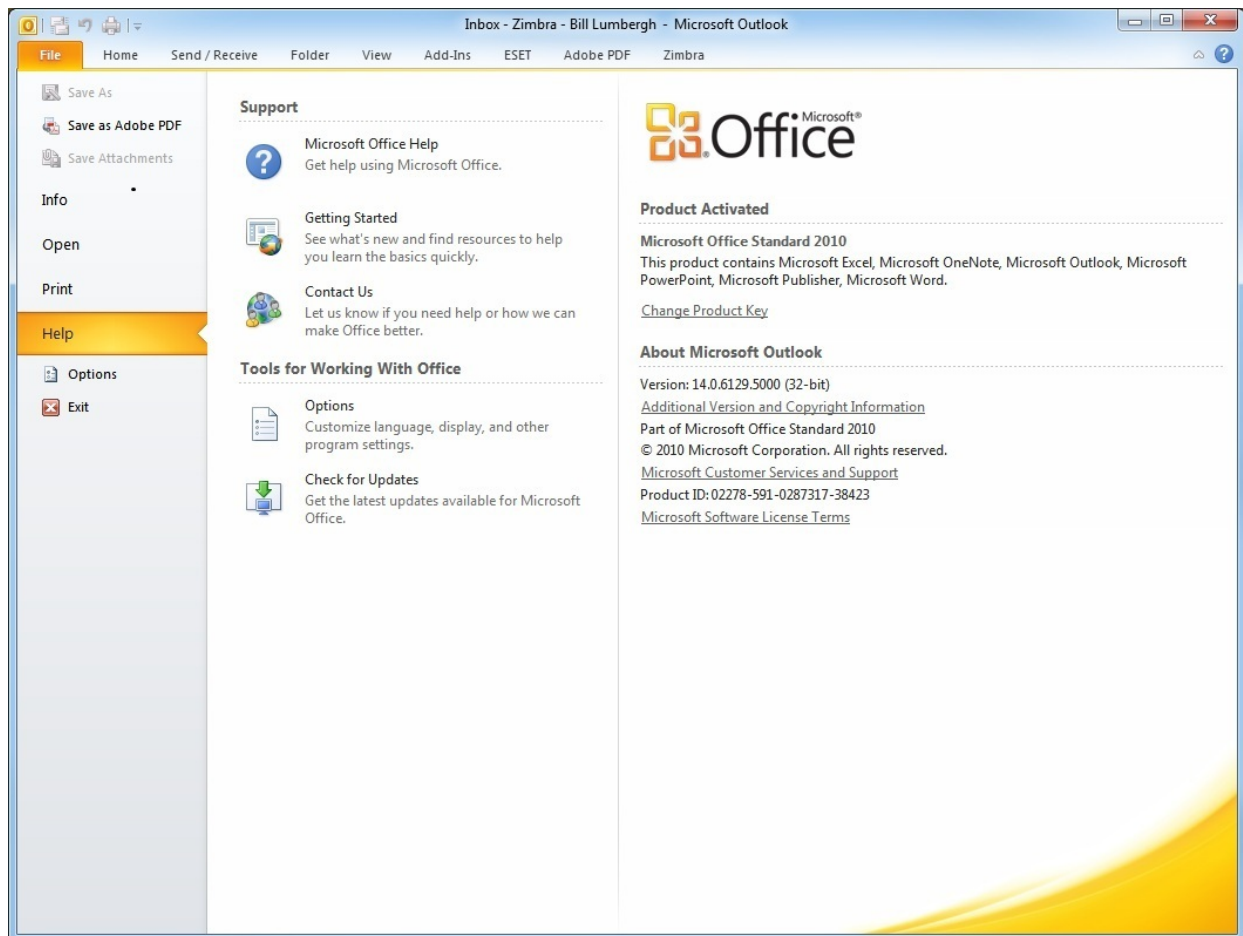
If you have not yet been given a copy of the installer for ZCO, please contact your systems administrator or technical coordinator to obtain it.

Determining what version of Microsoft Outlook you have installed can be accomplished by doing the following:

- Outlook 2007 – click on **Help > About Microsoft Office Outlook**. The resulting screen will look like this:



- Outlook 2010 – Click on **File > Help**. The resulting screen will look like this:



After determining what version of Microsoft Office you've installed, either 32 or 64 bit version, choose the corresponding Zimbra installer.

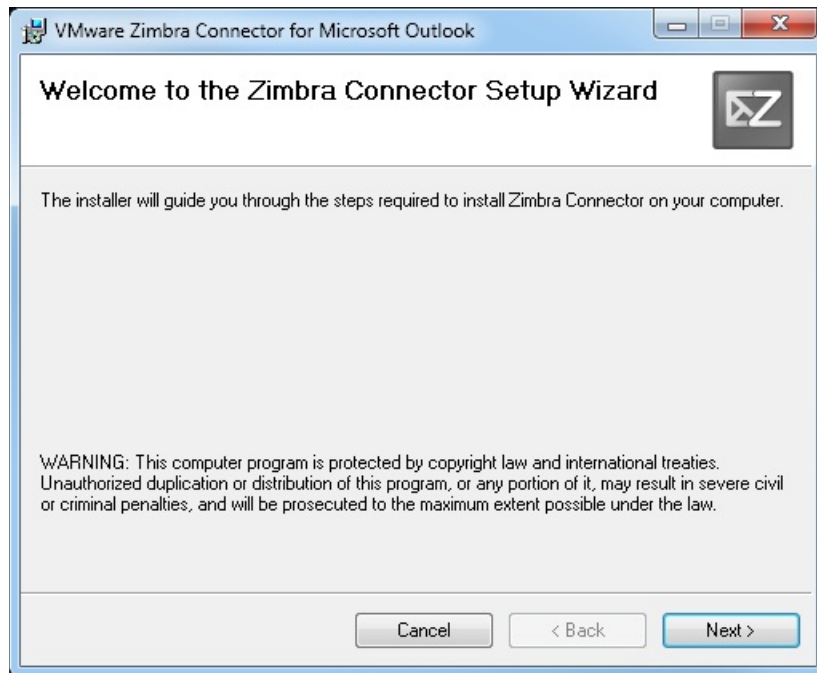
## Installing and Using the Zimbra Connector for Microsoft Outlook (ZCO)

There are several items necessary to know prior to installation of ZCO:

- The Zimbra server name: `zimbra.asolutions.com`
- Whether or not to check “**Use Secure Connection (SSL)**” – the answer is yes
- Complete username and password for email – these will be your Schafer Active Directory domain credentials

Once these items are known, the installation can be launched by running the installer that was provided:

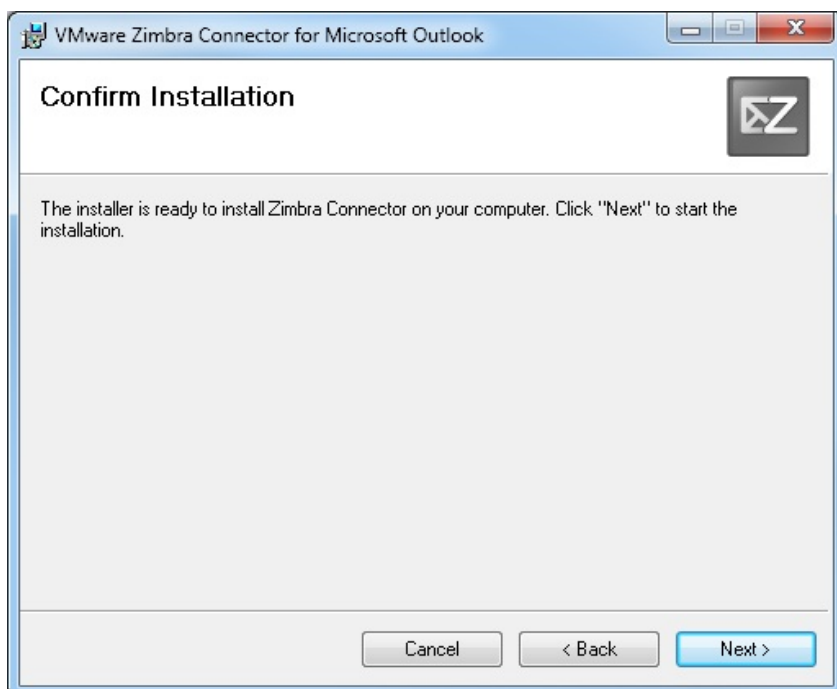
1. When the installer starts, a Welcome dialog displays. Click **Next** to continue.



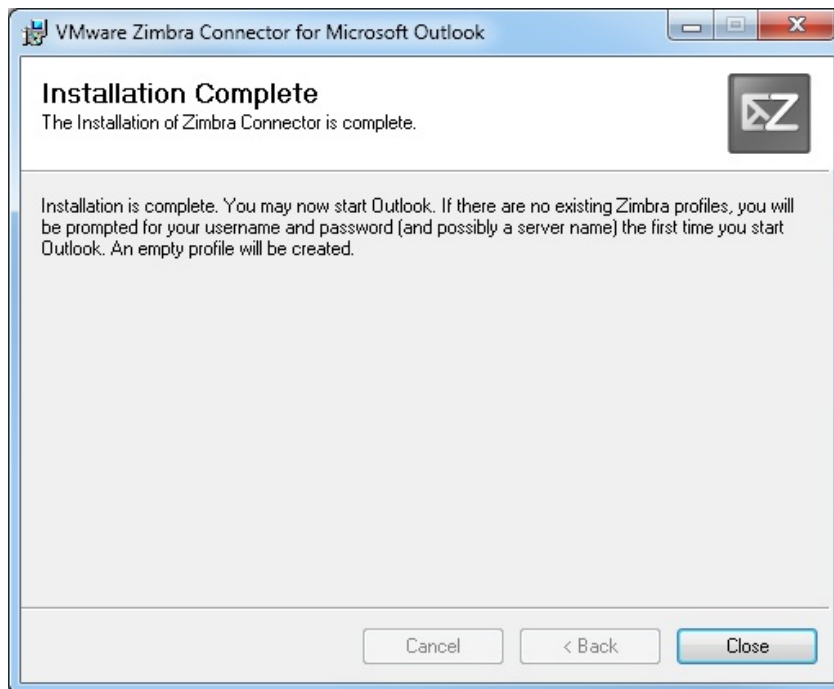
2. On the End-user License Agreement agreement page, click the “**I accept the terms in the License Agreement**” selection and click **Next**.



3. When the Confirm Installation page displays, click **Next** to begin the installation. The dialog displays the progress bar.



4. When the installation is complete, the Installation Complete dialog displays.



5. Open Outlook and complete the Zimbra Server Configuration Settings dialog as follows:
  - a. Server Name: **zimbra.asolutions.com**
  - b. **Use Secure Connection.** Check this box to establish a secure connection to the server.
  - c. Email address. This should be your Schafer Email Address:  
**firstname.lastname@domain.com**
  - d. Password: This is your Schafer Active Directory account password.
6. Click **OK** and the installation and configuration of ZCO is complete. A new Zimbra profile will be created and will be ready for use.
7. Outlook with ZCO is now ready for use.

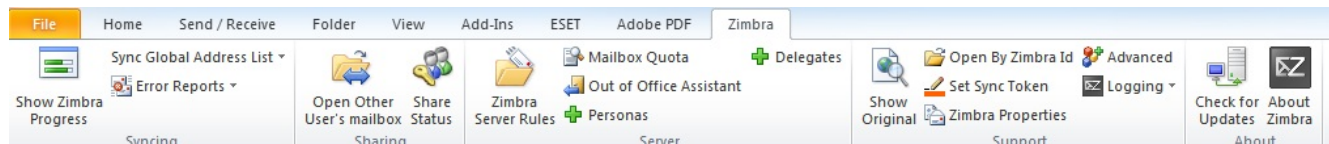
## Initial Synchronization for Email:

The first time opening Outlook after ZCO is installed, the Outlook mailbox must synchronize with the Zimbra server. If users have been using the Zimbra Web Client and already have email messages, chat archives, folders, tags, contacts, personal distribution lists, personal calendars, appointment reminders, and/or tasks on the Zimbra server, this information will be synchronized with their Zimbra profile in Outlook. The initial synchronization can last a few minutes or longer, depending on the size of the mailbox profile being synchronized.

## New Features provided by ZCO

For users accustomed to Microsoft Outlook using the Microsoft Exchange server, functionality should be relatively transparent in terms of email delivery. There are, however, several key features that Zimbra provides that are different:

***\*\*Note: Examples in this list refer to ZCO features using Outlook 2007. In Outlook 2010, the equivalent ZCO features are accessed from the Zimbra tab on the ribbon.\*\****



### Auto Archiving:

Outlook's AutoArchive function is **disabled** for Zimbra profiles and folders. This is not changed even if “**enable AutoArchive**” is selected from within Outlook. Outlook's global AutoArchive function remains enabled for Outlook features that are not Zimbra specific.

### Configuring Different Email Identities:

A Zimbra persona allows you to create a separate email identity to manage different types of email. For example, you can create a business persona for your business email and a personal persona for your personal email. By using a persona, you can specify a **From** address and/or a **Reply To** address for emails sent using that persona. All outgoing email displays the email address of the persona that you are using. You can view, add, edit, and delete your Zimbra Personas from Outlook.

***\*\*Note: If you previously created personas using the Zimbra Web Client, the personas also exist in Outlook.\*\****

#### To Add a Persona:

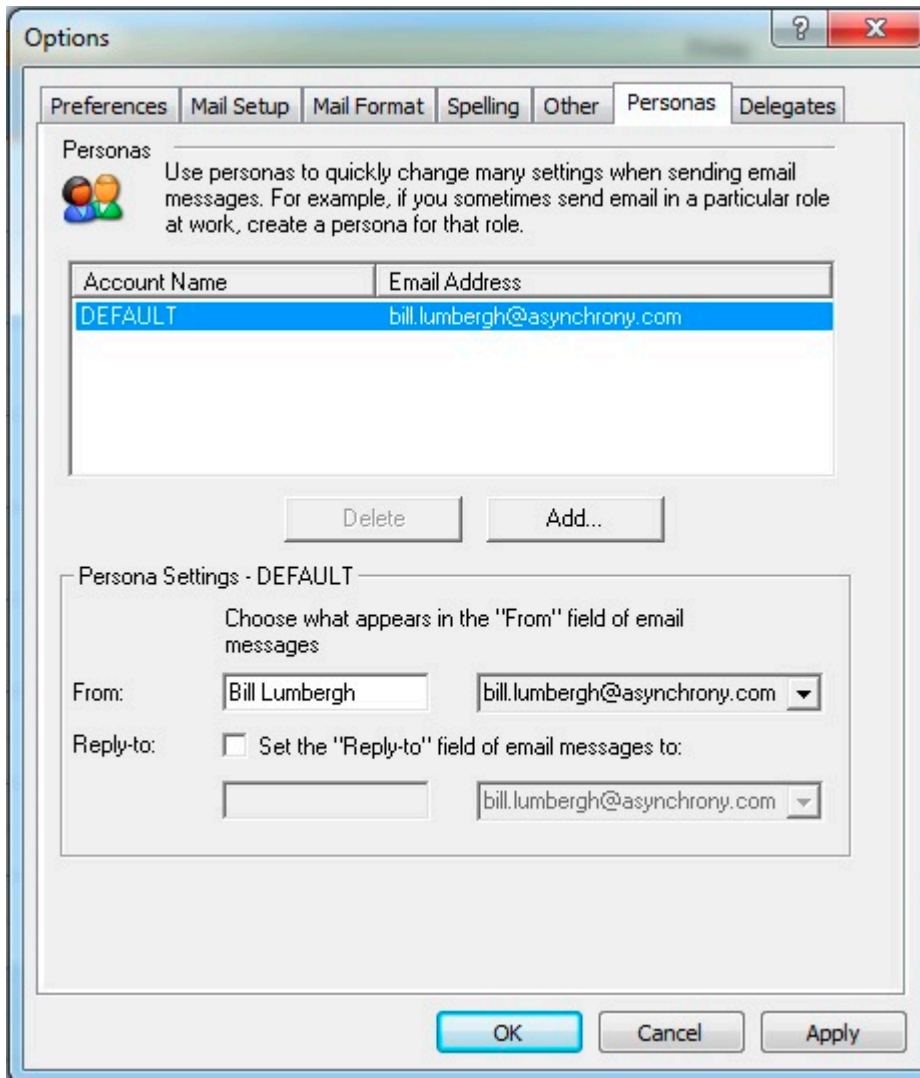
1. Select **Tools > Options**.
2. Click the **Personas** tab and click **Add**.
3. Enter the name for the new persona and click **OK**.
4. (Optional) In the Personas Settings area, edit the **From** name field. The name and email you enter is displayed in the From field of outgoing emails sent using this persona. For example, emails sent from a business persona might be sent by Sam Sample, while emails sent from a personal persona might be sent by Sam.
5. (Optional) Check the Set the **Reply-to** field of email messages to box. Enter the Reply-to name and email address. This displays in the Reply-to field of outgoing emails sent using this persona. Replies sent to these emails are automatically directed to the Reply-to address.
6. Click **OK** to save your changes.



### To Select a Default Persona:

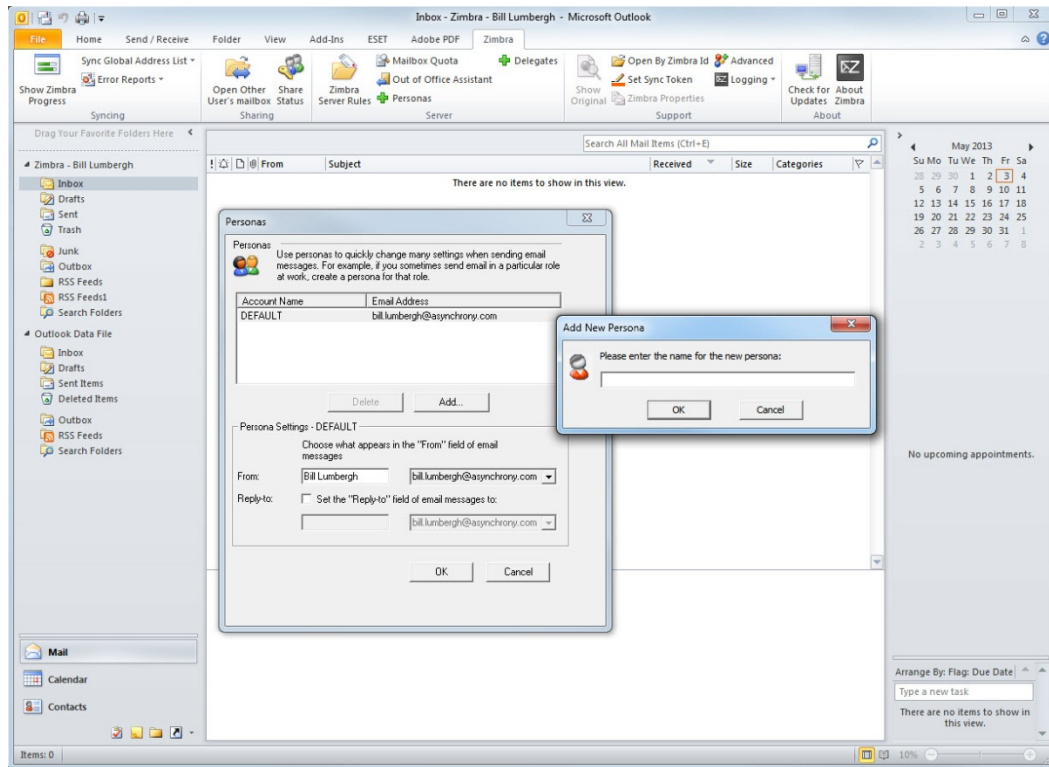
For Outlook 2007:

1. Select **Tools > Options** and select the **Personas** tab
2. Select the address and click Set as Default. You can only have one default



For Outlook 2010:

1. Click on the Zimbra Ribbon and select **Personas**.
2. Select the address and click **Set as Default**. You can only have one default persona.



### To Delete a Persona:

1. Select the Persona you wish to delete.
2. Click **Delete**. The Persona is deleted.
3. Click **OK**.
4. To recover a deleted Persona before changes are applied, click **Cancel**.

**\*\*Note: you cannot delete the default Persona. Personas cannot be recovered or restored once your changes are applied.\*\***

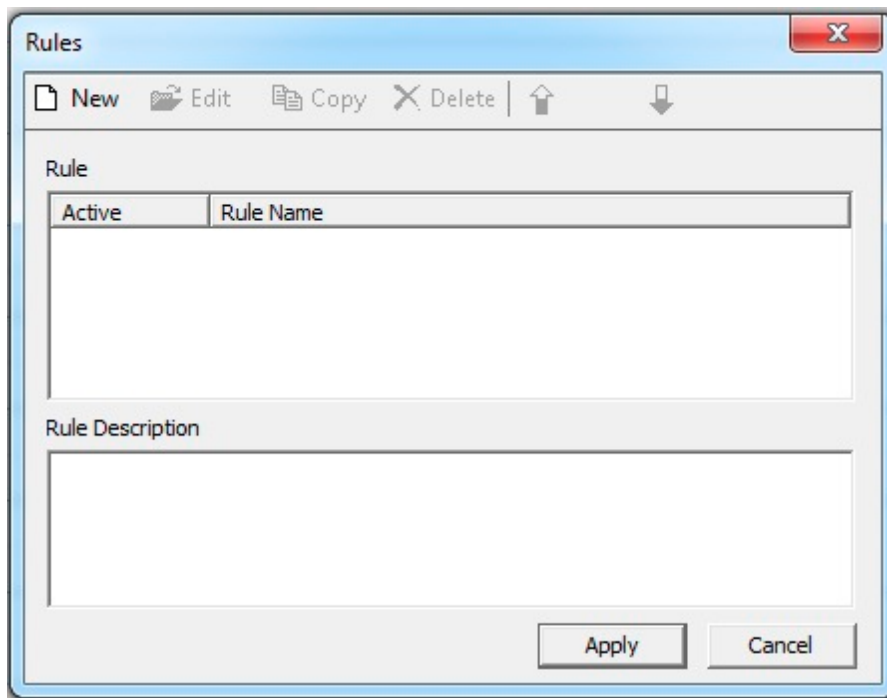
### Using Filters to Manage Email Messages

**\*\*Note: Outlook local rules for filtering are disabled by default with ZCO.\*\***

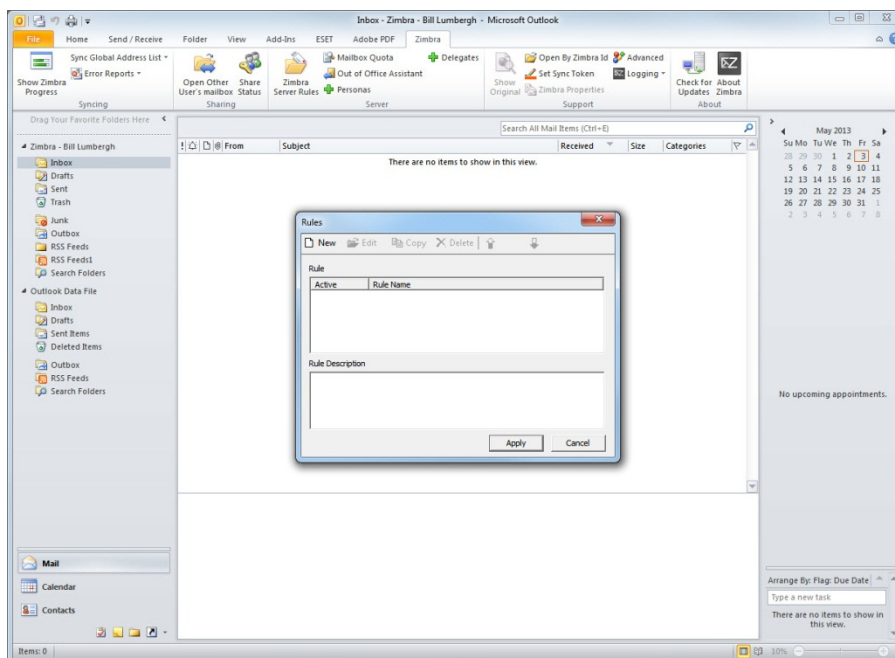
You can use the Zimbra Server Rules feature to create filters to manage your email and Calendar invitations from Outlook. A filter consists of rules or conditions. If the rule is met, a specified action is performed. Zimbra Server Rules let you create filters to do the following:

- Move an email into a specific folder
- Delete a message
- Forward a message
- Assign an email to a category
- Flag a message
- Mark a message as read

You can edit and view your Zimbra mail filters in Outlook 2007 from **Tools > Zimbra Server Rules**:



In Outlook 2010, you can edit and view your Zimbra mail filters by clicking **Zimbra** on the ribbon and selecting **Zimbra Server Rules**:



### Create a New Email Rule:

1. In the Rules dialog box, click **New**. A Rules Wizard dialog displays.
2. In the Select condition(s) section, select the conditions that the message must match. As you select the conditions, they display in Edit the Rule Description section.
3. If the condition you selected requires a value, such as “with specific words in the body”, you must enter the values or parameters for the condition:
  - a. Click the condition line in the Edit the Rule Description section.
  - b. In the dialog that opens, enter, add, or select the value(s) or parameter(s) for the condition and click **OK**.
4. Click **Next**.
5. In the Select actions section select what you want to do with the message, such as moving or forwarding the message. As you select the action, it displays in the **Edit the Rule Description** section.
6. If the action you selected requires a value, you must enter the values or parameters for the action:
  - a. Click the **action line** in the **Edit the Rule Description** section.
  - b. In the dialog that opens, enter, add, or select the value(s) or parameter(s) for the action and click **OK**.
7. Click **Next**.
8. In the **Select exception(s)** section, select the exceptions that the message must match. As you select the exceptions, they display in **Edit the Rule Description** section.
9. If the exception you selected requires a value, you must enter the values or parameters for the exception:
  - a. Click the **exception** line in the Edit the Rule Description section.
  - b. In the dialog that opens, enter, add, or select the value(s) or parameter(s) for the condition and click **OK**.
10. Click **Next**.
11. Enter a name for your new rule in the **Specify a name for this rule** field.
12. Select whether to apply the rule to messages that meet **Any condition** or **All conditions**.
13. (Optional) Select **Do not process additional filter rules** if applicable.
14. Review your rule description.
  - a. To make changes, click **Back**.
  - b. If your rule description is correct, click **Finish**.

Your new rule will now display in the Rule list.

### Edit an Email Rule:

1. Select the rule you want to edit.
2. Click **Edit**.
3. Select the condition, action, exception, or other detail you want to edit.
4. Click **Next**.
5. Click **Finish** when you are finished editing the rule.
6. Click **Apply** to exit the Rules Wizard and save your changes.

### Delete an Email Rule:

1. Select the rule you want to delete.
2. Click **Delete**.
3. Click **Apply** to exit the Rules Wizard and save your changes.

## Out-of-Office Reply

You can send an automatic response to people who send you messages when you are out of the office:

In Outlook 2007, click **Tools > Out of Office Assistant**

In Outlook 2010, click **Zimbra** on the ribbon and select **Out Of Office Assistant**

**Out of Office Assistant**

☐ I am currently in the Office

☒ I am currently Out of the Office

Auto-reply once to each sender with the following text:

I will be out of the office the week of May 6th through 10th returning on May 13th.

If this is an urgent matter, please contact my assistant, Michael Bolton or expect a reply from me as soon as possible.

Send auto-replies during this period

☒ Start: 5/ 6/2013 00:00

☒ End: 5/10/2013 00:00

External Senders

☒ Send different reply to external senders Anyone outside my domain

I'll be out of the office until next Monday. Please be patient as I will be returning all email at that time.

Thank you!

OK Cancel

1. Select **I am currently Out of the Office**.
2. In the text box, type the message you wish to be sent, such as “I am on vacation from June 1 to June 6 and will not be checking for messages.”
3. Set the Start and End dates and times to use this message.
4. (optional) If you want to send an alternative message to external users, select **Send different reply to external senders**. Use the drop-down menu to specify whether this message goes to everyone outside your domain or just those not in your address book.
5. Click **OK**. The away message starts on the date and time specified.

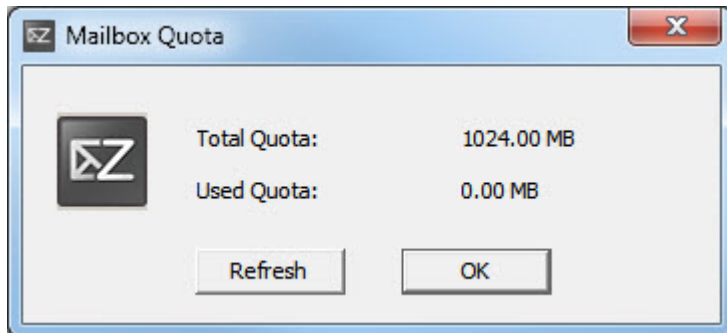
## Viewing Mail Storage Quota

You can store email messages on the Zimbra server up to the quota set for your mailbox. Email messages, attachments to messages, address books, calendars, tasks, and the items in your Trash folder contribute to your used quota. When your quota is reached, email messages sent to you can be rejected by the Zimbra server.

To check your Zimbra Mailbox Quota from Outlook:

In Outlook 2007, click **Tools > Mailbox Quota**

In Outlook 2010, click **Zimbra** on the ribbon and select **Mailbox Quota**



## Sharing Folders

You can share your email, address book, calendar, tasks, and briefcase folders with others in your organization. You can share with internal users who can be given complete manager access to the folder.

### Creating Internal Shares

When you share your folders, you identify the users with whom you wish to share them:

- Zimbra users or groups listed in your Global Address List (GAL) can view your folder. You select the types of privilege to grant to these users.

### Assigning Roles and Access Privileges

Roles are preset combinations of access privileges.

Privileges are defined as follows:

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

Roles that can be granted to an internal user are the following:

- **Administrator:** **Read, Edit, Create, Delete, Act on workflow, Administer folder.** The grantee has the same access to the folder as the owner.
- **Delegate:** **Read, Edit Create, Delete, Act on workflow**
- **Reviewer:** **Read.** This role is the default

## Share a Folder with Another Zimbra User

1. Right-click the folder you want to share.
2. Select **Properties**.
3. Click the **Sharing** tab.
4. Click **Add**.
5. Select **Internal** and click **OK**.
6. In the Search field, start to type the name to show the access list. Make sure you select the Address Book from which you want to search names.
7. Select who you want to delegate access.
8. Click **OK**. The name displays in the Properties dialog.

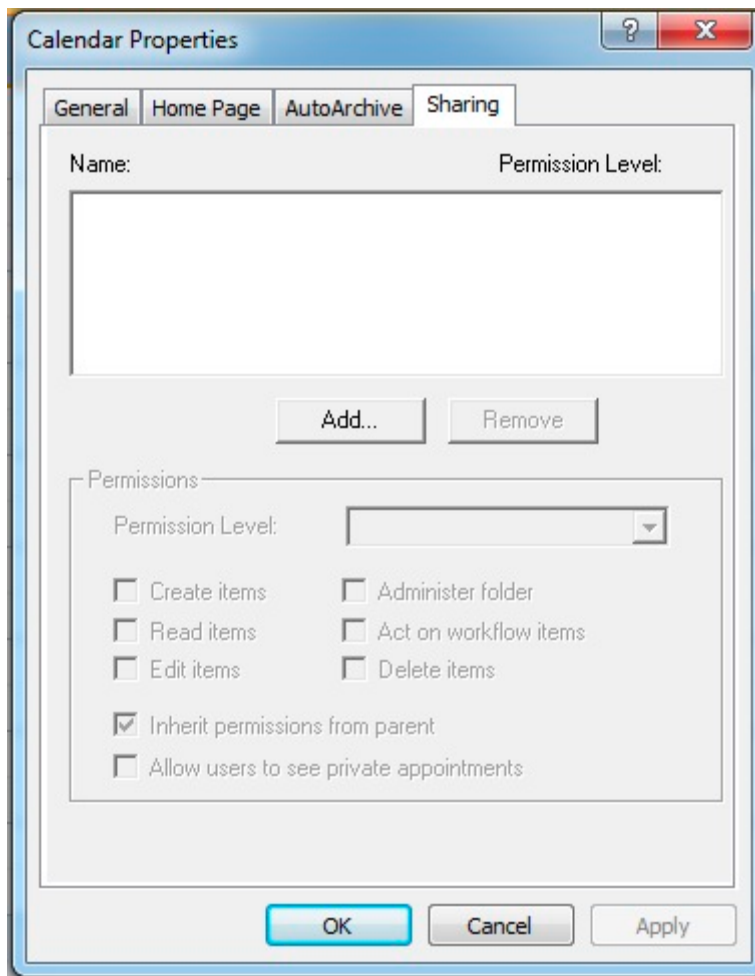
***\*\*Note: You can only add one person at a time. To share the folder with more than one person, repeat these steps above.\*\****

9. From the Permission Level menu, select the role that defines the access privileges:
  - **Administrator:** Can create, read, edit and delete items. Can also administer a folder and act on workflow items.
  - **Delegate:** Can create, read, edit and delete items and act on workflow items.
  - **Reviewer:** Has read-only privileges.

But if you want to have the permission level the same as the “parent” folder’s, check the Inherit permissions from parent.

10. Click **Apply**.
11. Click **OK**.

A notification email will be sent to the person with the sharing information.



### Change or Revoke Shared Access

You can change the role you assigned and delete access to a shared folder:

1. Right-click the folder you want to share.
2. Select **Properties**.
3. Click the **Sharing** tab to see who has been given permission to access the folder.
4. Select the name and change the permission levels.  
To cancel the access, select the name and click **Remove**.
5. Click **OK**.

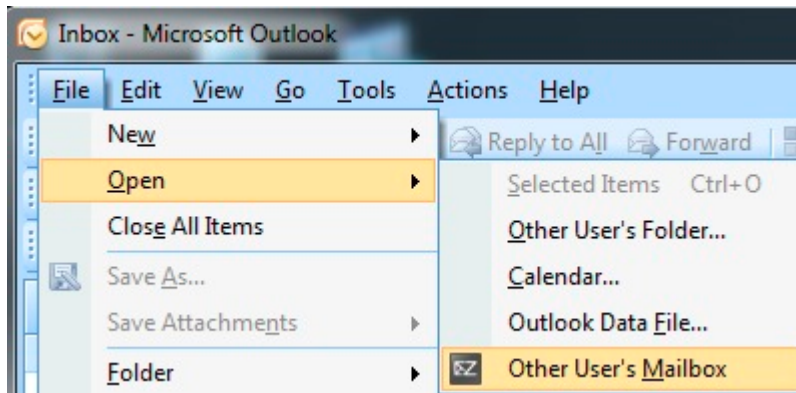
The next time the grantee synchronizes with the Zimbra server, the shared folder information will be updated. If access was deleted, the folder is removed when the grantee synchronizes.



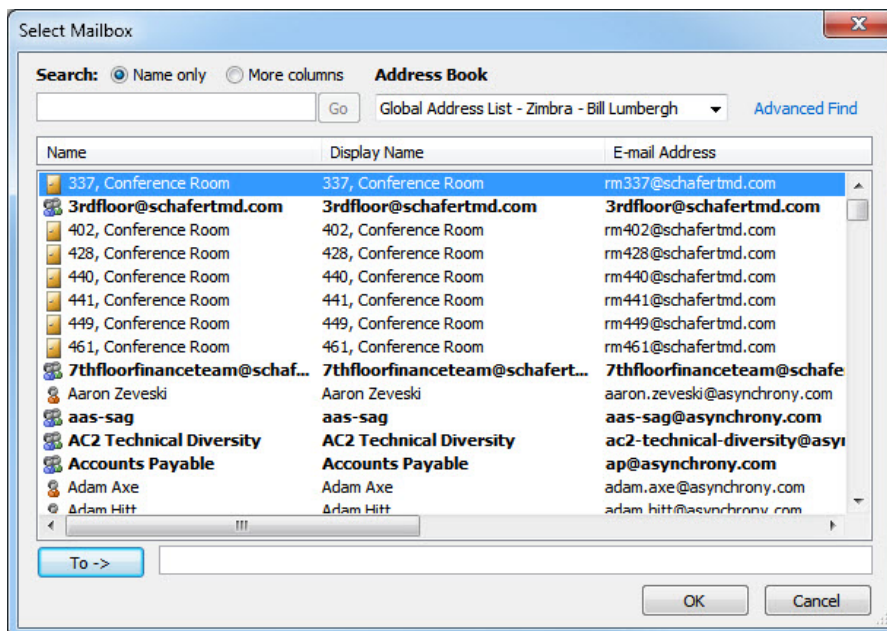
## Open another User's Mailbox

If you have been granted access to someone's folder, you can access that folder by doing the following:

In Outlook 2007, click **File > Open > Other User's Mailbox**:



In Outlook 2010, click **Zimbra** on the ribbon and select **Open Other User's Mailbox**



1. Select **Global Address List** on the **Address Book** dropdown menu.
2. Browse to the name of the person who has given you access or enter the email address.
3. Click **OK**.
4. To see all of the folders in the mailbox that are shared, view the folder list in the Outlook navigation pane.

## Using Zimbra Tags and Outlook Categories

In your Zimbra account, Outlook Categories are identified as tags. In Outlook, you can assign categories to email messages, contacts, tasks, and appointments. These categories are synchronized to your Zimbra account and are identified as tags when viewing your account from the

Zimbra Web Client. You can use tags to organize and find particular items. You can apply more than one tag to an item.

1. To browse your account by category, go to your Zimbra mail folder in the ZCO Navigation pane.
2. Select **Search Folders > Categorized Mail**. The mail is displayed grouped by category in the Content pane.

