



**OPEN-XCHANGE
SERVER
Oxtender for Mi-
crosoft Outlook**

OPEN-XCHANGE SERVER: Oxtender for Microsoft Outlook

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Chapter 1. The OXtender for MS Outlook

1.1. Overview

With the OXtender for Microsoft Outlook you can use Microsoft Outlook as a convenient client for the Open-Xchange Server. The aim is to transfer smoothly the user of Microsoft Exchange Server to the Open-Xchange collaboration and integration Server.

With the help of the OXTender for Microsoft Outlook, Outlook users continue to use their Outlook functions in combination with Open-Xchange Server. The conversion to unusual working environments and differently structured screen layout can be avoided completely. With OXtender for Microsoft Outlook, the functionality of Open-Xchange typical functions can be used while continuing to work with the Outlook client. The e-mail functionality of the Open-Xchange Server is set up via POP3 account settings or preferably via a typical Outlook IMAP based setup.

The synchronization of locally stored journal and notes folders is currently not supported.

1.2. Supported Functions

- Calendar
 - Personal and Group Calendar Entries
 - Recurring Calendar Entries
 - Automatic free/busy Availability Check
 - Support of private flag: Entries marked as "private" are not visible to other users.
- Contacts and Distribution Lists
 - Global Address Book with a List of all Open-Xchange Users
 - Distribution Lists for All User Groups
 - Support of private flag: Entries marked as "private" are not visible to other users.
 - Photographs of contacts: An image added to a contact will be saved on the Open-Xchange Server.
- Tasks
 - Synchronization of Task Management with Groupware
 - Reminder E-Mails for Outstanding, Upcoming Tasks
 - Tasks can be delegated to other users.
 - Support of private flag: Entries marked as "private" are not visible to other users.
- E-Mail

Functions not supported in the current version

- Full SMTP/IMAP/POP3 Support
- File Attachments
- Folder Management
 - Support of Public, Shared and Private Folders
 - Access Permissions for private and public Folders based on Access Permissions of the Open-Xchange Server
- Outlook user profiles are supported: User can set several profiles, e.g. for different users on the same machine.
- Support of Categories
- Formattings in the "notes" fields in appointments, contacts and notes will remain.
- Offline and Online Mode (automatic detection)
- Security through HTTPS
- Silent Installer
- Status Monitor
- Support of an Update Server for Decentralized Software Maintenance
- Push Technology for Automated Data Synchronization to Reduce System Load

1.3. Functions not supported in the current version

- Linked contacts *
- Recurring tasks *
- Magic IMAP to Inbox folder mapping *
- Error Reporting *
- HTTPS based on untrusted certificates
- Outlook 97 support
- Windows 95, 98, NT support
- Server-side administration of notes and journal folders

* These features will be supported in a future version.

Chapter 2. Using Outlook with the OXtender for Microsoft Outlook – A brief Guide

As a Personal Information Management Suite (PIM), MS Outlook is very widespread. Many users want to continue to use MS Outlook as their desktop or laptop working environment. With Open-Xchange Server, users can continue to work through MS Outlook, while the organization can benefit from the cost, security and innovation advantages of an Open Source solution at the server.

Open-Xchange Server was designed from the ground up on the principle that it could be used or interfaced with a wide variety of clients; the end-user can flexibly choose the client interface that he or she likes most and experience little or no change in functionality.

For example, in a certain organization, it can occur that some employees use MS Outlook to access the Open-Xchange Server; other users may choose to use the web interface with the help of the Open Source Mozilla browser, while still others may use a PDA to coordinate group appointments.

The Open-Xchange Server is capable of synchronizing the data from all of these environments, all at the same time. The Open-Xchange Server is thus an integration platform for the cooperation of your employees that enables organizations to implement and expand heterogeneous client environments while retaining the well-documented advantages of server-based computing.

2.1. Outlook as an Email Client and a Collaborative Environment

The OXtender for Microsoft Outlook interfaces Outlook with the Open-Xchange Server in such a way that a great many of the collaborative features available to Open-Xchange users can be accessed directly through the Outlook client. Specifically, the OXtender for Microsoft Outlook handles the synchronization of folders, contacts, calendars, and tasks. If there are folders with more than 10,000 objects the synchronisation slows down. It is also important to understand that the OXtender does not handle the transfer of e-mail between the Open-Xchange Server and the Outlook client; the Outlook client accesses e-mail by communicating directly with the Open-Xchange Server by way of standard mail protocols, namely SMTP, IMAP and POP3. In addition to explaining the ways in which Outlook works with the Open-Xchange Server via the OXtender for Microsoft Outlook, this manual also details the procedures for configuring Outlook to access Open-Xchange e-mail accounts.

The way that MS Outlook is configured to work with the Open-Xchange Server will depend on (1) how your organization and (2) how the individual user wants to work with calendar, contacts, tasks, folders and e-mail. The Open-Xchange Server functionality related to projects, documents, forums, bulletin boards and knowledge bases can only be used using a browser, because MS Outlook does not support these features.

You will find an overview of various possibilities for connecting MS Outlook with an Open-Xchange Server and with other e-mail servers in Appendix A. You will find detailed information regarding the setup of an Outlook e-mail account in the Chapter 5, *Outlook Client Mail Configuration*.

2.2. Folder Structure

With the installation of the OXtender for Microsoft Outlook, all private folders, in addition to three special Open-Xchange folders, are displayed in alphabetical order under Personal Folders in Outlook. To see these folders, select the “Folder List” view in the lower left-hand corner of the Outlook window. The OXtender for Microsoft Outlook synchronizes all folders of the types Calendar, Contacts, and Tasks with the Open-Xchange Server (journal and note folders are not supported). Using the web browser groupware interface, these are accessible under “Folder” in the toolbar. The folders are synchronized in real time, meaning that changes made from either the web interface or through Outlook are reflected in the other immediately. The three special Open-Xchange folders—OX Shared Folder, OX Public Folder, and OX System Folder—are also synchronized with the server. The OX Public Folder is a place where all users can store and share data. The OX Shared Folder contains the private folders of other users to whom specific access permissions have been granted. The OX System Folder stores system-wide address books. All of these folders are discussed in greater detail in *Using Outlook and the OXtender for Microsoft Outlook*.

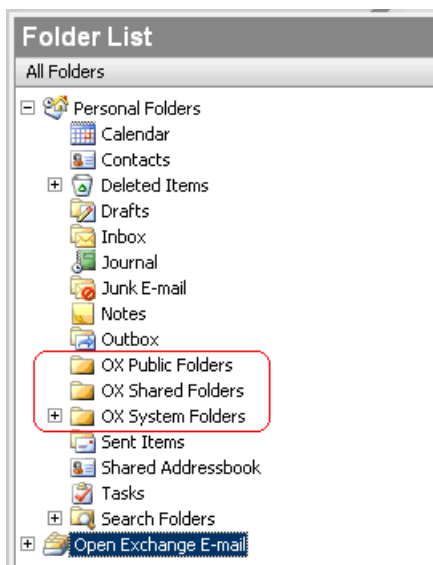


Figure 2.1. The Outlook Folder List. Open-Xchange Folders are circled in red.

2.3. Calendar

Calendar events, for individual users or groups, can be created in Outlook in the same manner that they are created when the client is used in conjunction with a regular Microsoft Exchange Server. Scheduling information can be created, read, and edited in your private calendar or in public or shared calendar folders. The Open-Xchange Server supports Outlook’s Free/Busy functionality, a feature that allows a user to query the availability of others based on their calendar information. The calendar also supports the reservation of company resources, such as rooms or equipment. The ability to create a series of events is also supported. Other users may be invited to events and may choose to accept or decline the invitation. In addition, there is an Open-Xchange Server-specific conflict negotiation system, which gives a warning message if events overlap.

2.4. Contacts

Access to contacts is determined by permissions set through either the web interface or through the Outlook client. Using public and shared folders, contacts can be created in different virtual address books with various access rights. In addition, there is also a general global address book, stored in the OX System Folder, which is visible to all users.

2.5. Tasks

Tasks can be created and edited in Outlook as usual for individual users and user groups. Additionally, you can create task sequences, as well as tasks in public or shared folders. The assignment of tasks to a project, which is possible via the Open-Xchange Server web interface, is not supported by MS Outlook.

2.6. E-Mail

Differing from a setup involving a Microsoft Exchange Server, Outlook communicates with the Open-Xchange Server via the IMAP e-mail protocol. Because of the way Outlook handles IMAP messages, there are a few minor functional differences that the user should be aware of. Most importantly, incoming e-mail is not stored in the Inbox located under **Personal Folders**, but in a separate folder stored beneath the Personal Folders. More information on this subject can be found in the chapter "Using Outlook and the OXtender for Microsoft Outlook" and a guide to setting up such e-mail accounts is available in "Configuring the Outlook Client".

Chapter 3. Installing the OXtender for Microsoft Outlook

3.1. Requirements

In order to install and use the Outlook OXtender, a few basic system requirements must be met:

3.1.1. Server

Open-Xchange Server 6, build number 6506 or higher

3.1.2. Client-PC

3.1.2.1. Operating system:

Windows Vista 64 Bit
Windows Vista
Windows XP

3.1.2.2. MS Outlook:

MS Outlook 2007
MS Outlook 2003

3.1.3. XML-Parser:

Use the installed Internet Explorer 6.0 or higher.
The current MSXML 3.0 Parser Library can be downloaded and installed as an alternative

3.1.4. Cookies

Activate cookies in the Internet Explorer settings. In the security tab either choose Low or Medium.

3.1.5. Login Data for the Open Xchange Server

Please also contact the Open-Xchange Server administrator to obtain your server access parameters.

IP address or Open-Xchange Server name
Your Open-Xchange Server username
Your password

3.2. System Settings (Firewall, Personal Firewall)

When using a firewall or a personal firewall, the following ports need to be open to enable proper function of Outlook together with the OXtender for Microsoft Outlook:

3.2.1. Outgoing Ports:

smtp	25/tcp	E-Mail, Simple Mail Transfer Protocol
http	80/tcp	World Wide Web HTTP
pop3	110/tcp	E-Mail, Post Office Protocol - Version 3
imap	143/tcp	E-Mail, imap2, Internet Message Access Protocol
https	443/tcp	Secure http protocol, via TLS/SSL 80
imaps	993/tcp	Secure imap4 protocol, via TLS/SSL
pop3s	995/tcp	Secure pop3 protokoll, via TLS/SSL (earlier: spop3)

3.2.2.

44335/udp	OXTender for Microsoft Outlook's Push Mechanismus
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3.3. Installation Steps

To install, you should be logged in to Windows as the user who will later use Outlook in combination with the Open-Xchange Server.

Note: Before you install the OXTender for Microsoft Outlook, make sure a new email account is created in the Windows system control. Use the same username and password as for your Open-Xchange Server account.

Install the Outlook OXTender on your client PC by executing the setup file.

OXTender_for_Microsoft_Outlook_English_x.x.x.msi

where x.x.x stands for the current version of the OXTender for Microsoft Outlook.

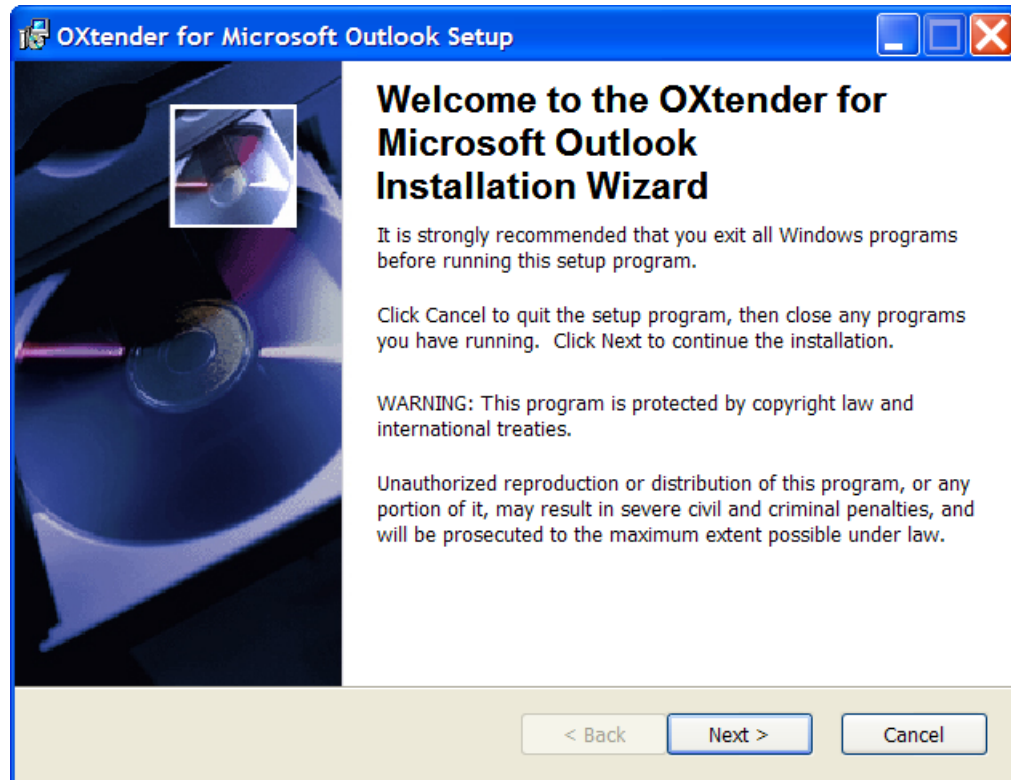
If you are doing a first installation of the OXTender for Microsoft Outlook, skip step 1 and go directly to step 2.

3.3.1. Step 1 - Uninstalling old versions

If there is an old OXtender for Microsoft Outlook version installed on your system, open the Windows control panel and uninstall the version.

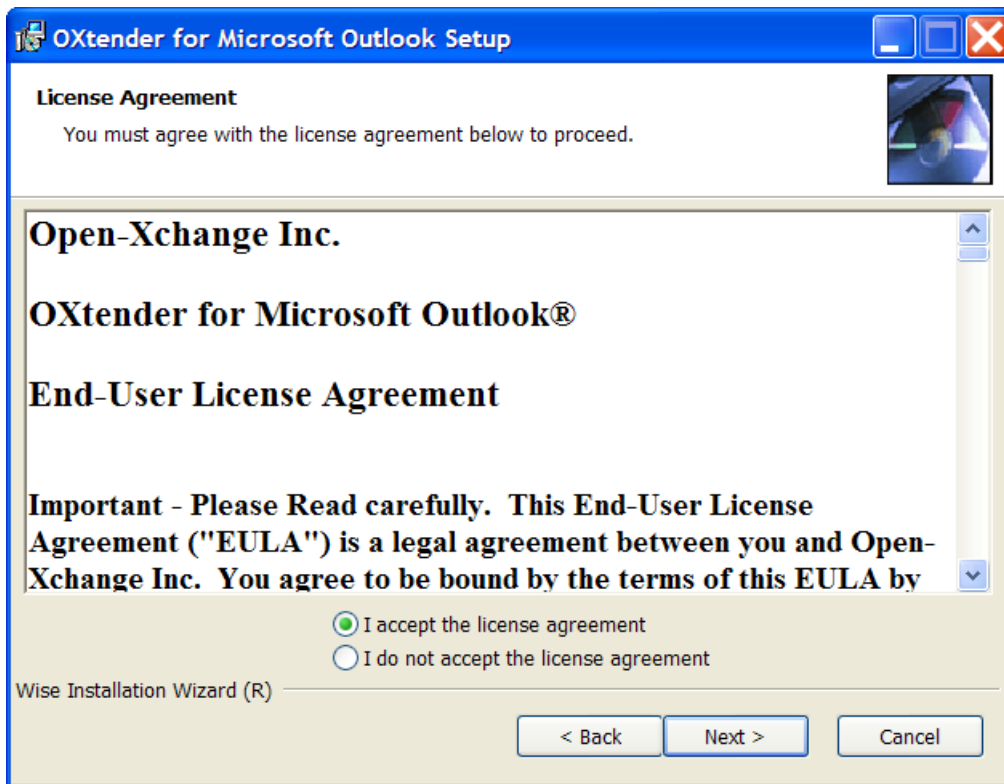
3.3.2. Step 2 - Starting the installation

To start the installation, double-click on the file Setup. The following dialog box opens.



Click on **Next**.

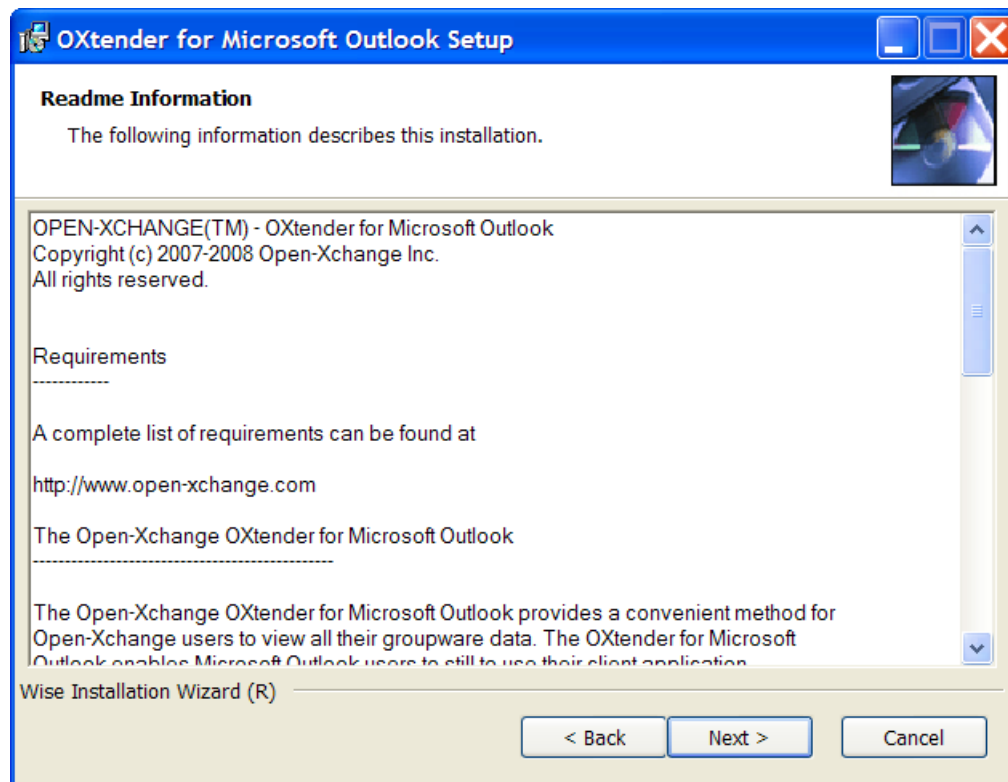
3.3.3. Step 3 - Accepting the license agreement



Read the license agreement. Click on the entry **I accept the license agreement**. Click on **Next**.

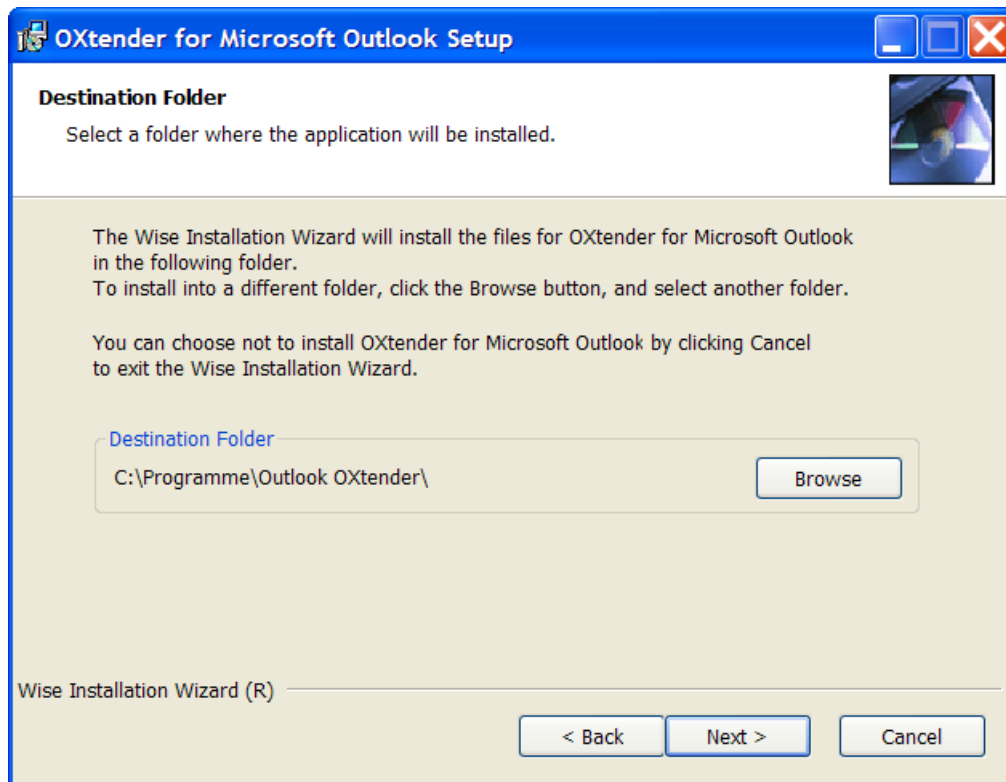
3.3.4. Step 4 - Displaying information

The following dialog box displays information on OXtender for MS Outlook.



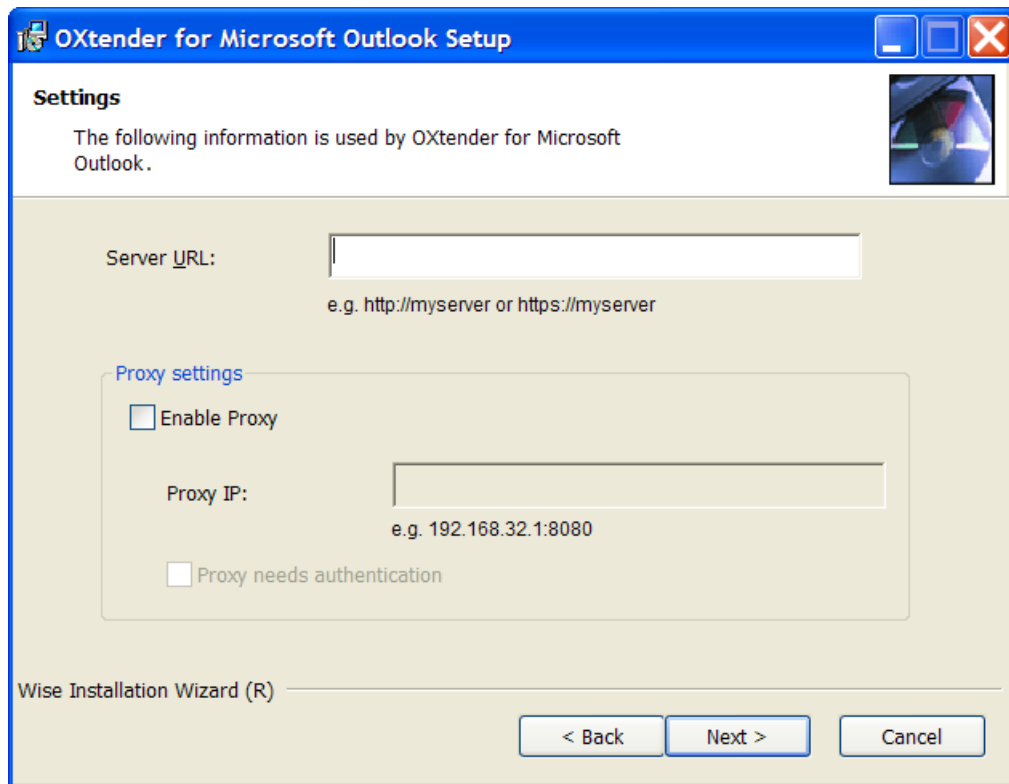
Click on **Next**.

3.3.5. Step 5 - Selecting the destination folder



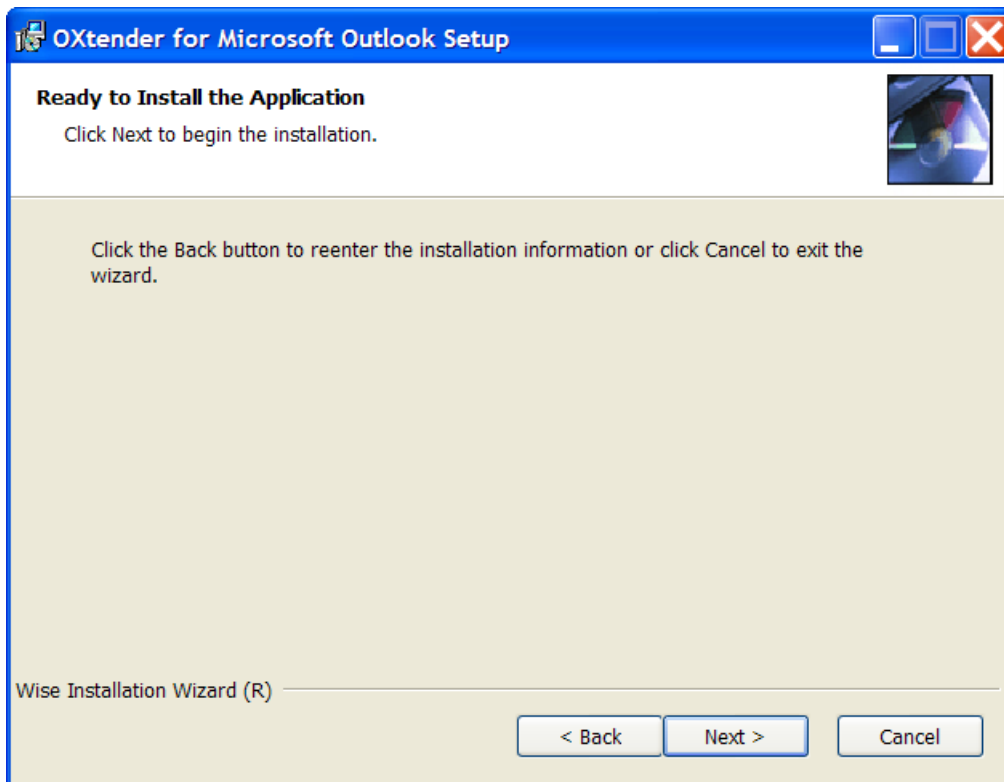
Select the destination folder for the installation. Click on **Next**.

3.3.6. Step 6 - OX settings



Enter the IP address or the name of Open-Xchange Server in the **OX URL** text field. If you use a proxy server, enter its IP address in the **Proxy IP** text field, and activate the **Activate Proxy** option. Click on **Next**.

3.3.7. Step 7 - Ready for install



To perform the installation, click on **Next**. A new dialog box informs you about the installation process.

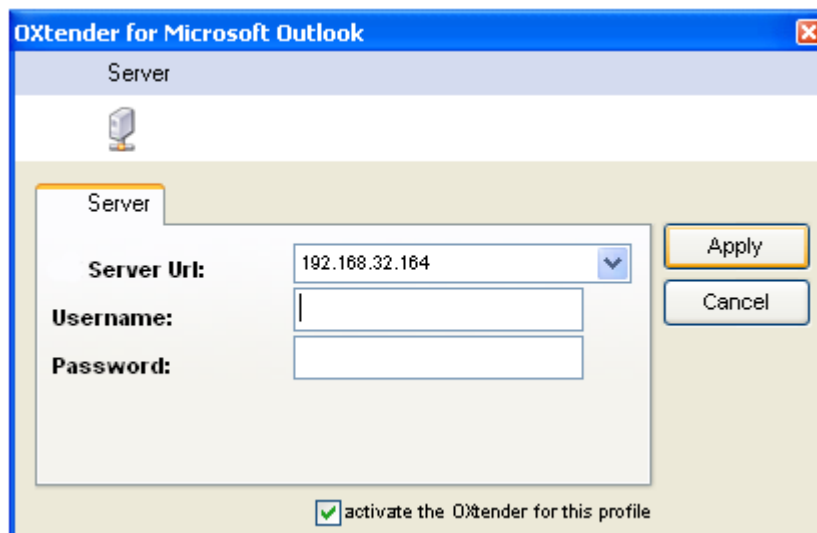
3.3.8. Step 8 - Completing the Installation



To complete the installation, click on **Finish**. The OXtender for Microsoft Outlook is installed.

3.3.9. Login to MS Outlook

Start Microsoft Outlook. Following dialog window will open:



Enter the same username and password as for accessing the Open-Xchange Server.

Chapter 4. Additional Installation and Configuration

4.1. Installing OXtender for MS Outlook on Multi-User Systems

In general, client systems are only used by a single user. In this case, Outlook OXtender simply has to be installed by the user in Windows.

If the client PC is used by multiple users, then Outlook OXtender has to be installed by each separate user. Every user will have future access to his data that is saved on the Open-Xchange Server.

Installation on a multi-user system by an administrator for the given system is performed as described in "Installation". As soon as a user logs onto this system later, a pop-up window will appear with which the user can set his own access information (username/password) for the Open-Xchange Server. The input of an IP number or the Open-Xchange Server address is no longer necessary in this case. This information will be automatically adopted during the installation carried out by the administrator.

4.2. Updating the OXtender for MS Outlook via an Update Server

During the OXtender for Microsoft Outlook installation a server can be set from which the administrator can make current updates of OXtender for Microsoft Outlook available for all clients. Via this feature, the end user can comfortably update his computer with the appropriate current version of OXtender for Microsoft Outlook, without the administrator having to visit every client PC.

Possible update processes:

- Automated, time-controlled update. The software checks in certain intervals for updates and installs them.
- Manual update

For each case the administrator has to set up the update server accordingly.

4.2.1. Updates server preparation - notes for administrators

Proceed as follows to prepare the update server:

Copy the actual update files to the update server, i.e. the following three files:

oxlook.dll

ooucmm_service.exe

oxnotifier.exe

Use the URL you entered for the update server during installation.

On the update server create a text file with the name VERSIONS. Use the URL you entered for the update server during installation.

In the file VERSIONS enter the names and the current version numbers for the update files.

Use the following syntax for the entries:

filename;version number;options;

Example VERSIONS file:

oxlook.dll;6.0.1.4;;

ooucm_service.exe;2.4.3.7.;;

oxnotifier.exe;1.2.2.3;;

When publishing new update files on the update server the version numbers respectively have to be modified.

4.2.2. Automatic update setup

To set up the automatic update, you have to modify the Windows registry key values on the workstations. Launch the registration editor and search for following branch:

HKEY_LOCAL_MACHINE\SOFTWARE\Open-Xchange\OOUCM

To activate the automatic update set the key automaticupdate to value 1.

To deactivate the automatic update set the key automaticupdate to value 0.

To set the day for the automatic update set the key days to a value between 1 and 8. The values stand for:

- 1 Sunday
- 2 Monday
- 3 Tuesday
- 4 Wednesday
- 5 Thursday
- 6 Friday
- 7 Saturday
- 8 Daily

Default setting is 6, i.e. the automatic update will run each Friday.

4.2.3. Manual update

To do a manual update right-click on the **OXNotifier** icon in Systray. In the context menu click on **Update**.

4.3. Uninstalling the OXtender for Microsoft Outlook

To uninstall the OXtender for Microsoft Outlook, close Microsoft Outlook. Then you can uninstall the OXtender for Microsoft Outlook via the Windows system control.

4.4. Configuration of Outlook OXtender

With the installation, Outlook OXtender was installed as an **add-in** for Outlook. If the installation was successful, you will find in Outlook an **extra** menu where you will see an **Outlook OXtender** entry listed last.

To configure OXtender for Microsoft Outlook, select in Microsoft Outlook the menu entry **Extras** OXtender for Microsoft Outlook. A dialog window with following menu items opens:

Authentication

Options

About

For each menu item there is at least one tab, where you can make settings or get information.

4.4.1. Authentication

The **Authentication** menu contains a tab **Authentication**.

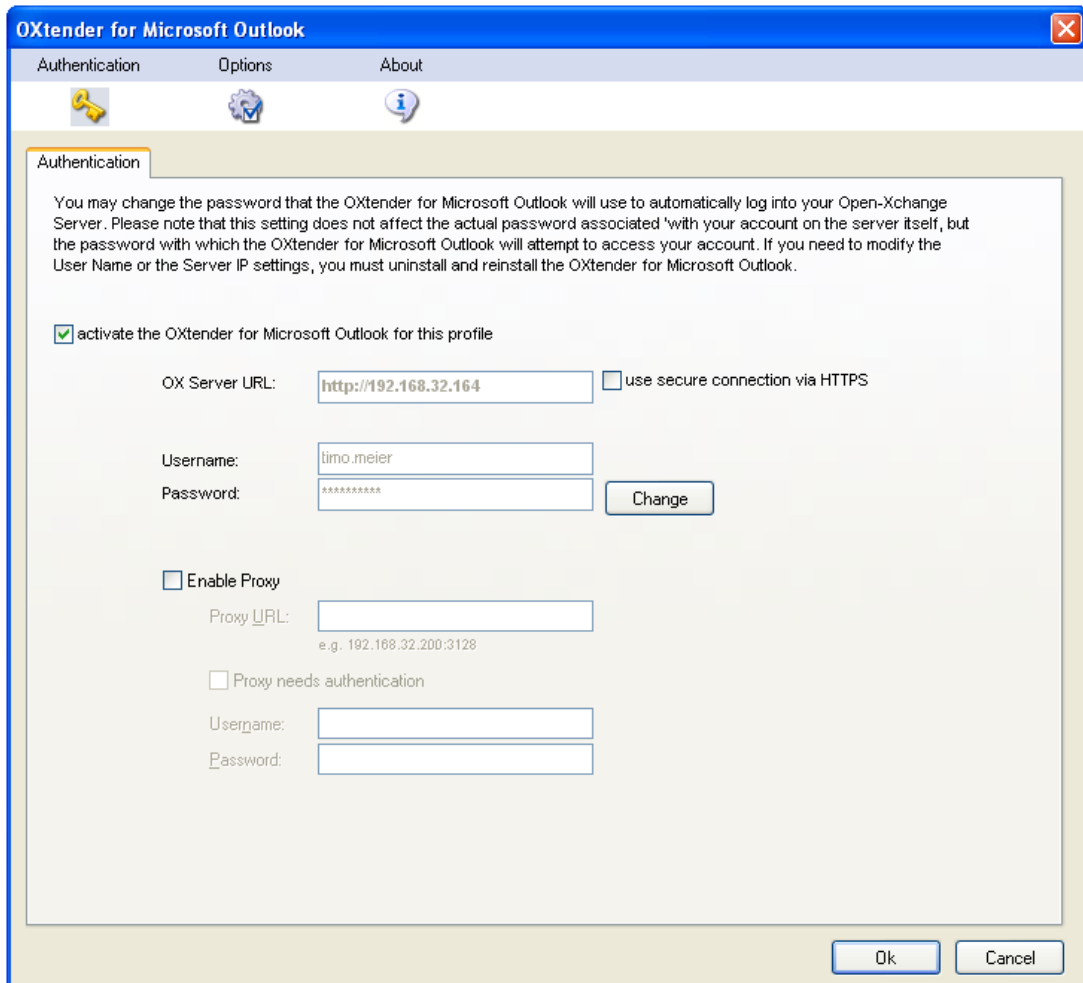


Figure 4.1. Authentication tab

With the checkbox **Activate OXtender for Microsoft Outlook for this profile** you can either activate or deactivate the OXtender for Microsoft Outlook. Per default the OXtender for Microsoft Outlook is activated. To deactivate the OXtender for Microsoft Outlook, deactivate the checkbox and click on **OK**. Restart Microsoft Outlook to activate the setting.

If you changed your password for accessing the Open-Xchange Server you have to respectively change the password here as well. Click on **Change**. Enter your old password and the new password. Confirm the new password. Restart Microsoft Outlook to activate the settings.

The other tab elements display settings chosen during the installation of OXtender for Microsoft Outlook.

4.4.2. Options

The **Options** menu contains a tab **Modules**.

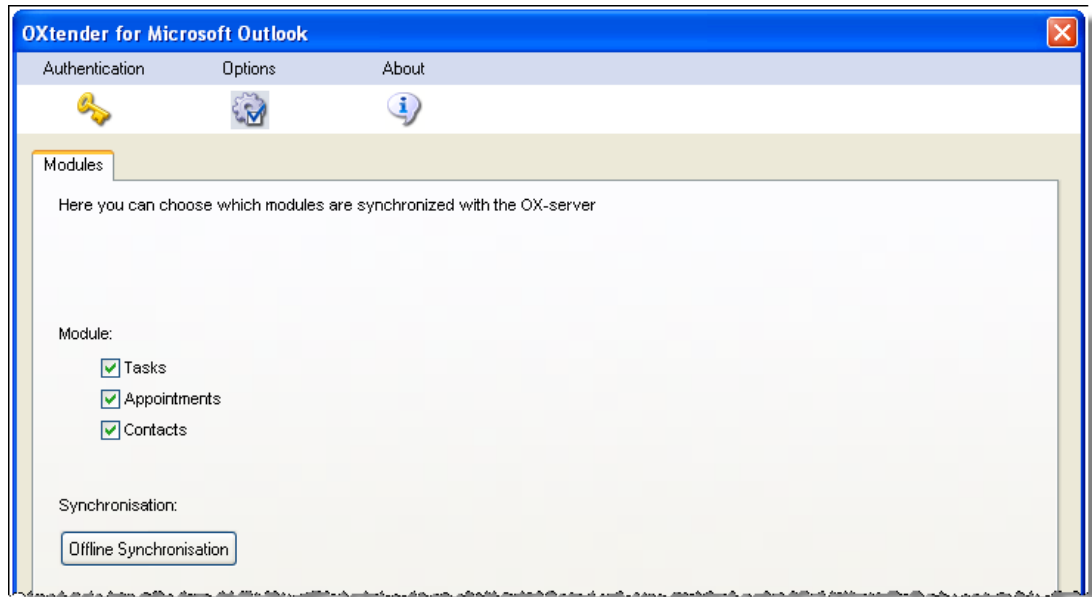


Figure 4.2. Modules tab

Use the checkboxes **Tasks**, **Appointments** and **Contacts** to choose the modules to be synchronized with the Open-Xchange Server. Per default all three modules will be synchronized.

If you have not connected to the server for a long time, it is likely that there are many new information on the server. To get the information click on **Offline synchronization**. Confirm the request by clicking **OK** in the next dialog window. All data from the previously selected modules are fetched.

4.4.3. About

The **About** menu contains the tabs **About** and **Ignored objects**.

The **About** tab contains information on the OXtender for Microsoft Outlook.

The **Ignored objects** tab shows a list of ignored objects. If you create a new object that, due to a conflict, cannot be created on the server the new object will be shown in this list.

Chapter 5. Outlook Client Mail Configuration

MS Outlook can be figured so that users have direct access to their Open-Xchange e-mail information. In this chapter you will find instructions on how you can use Outlook in combination with the Open-Xchange Server, and in which way you can use the MS Outlook free/booked interface for appointment planning.



While the OXtender for Microsoft Outlook allows Outlook to connect to the Open-Xchange Server and synchronize folders, contact, calendar data, and tasks, it does not handle the connection to the Open-Xchange e-mail server; the Outlook client supports this connection natively. In case the calendar, for example, needs e-mail access to send an appointment notice, OXtender will independently access available Outlook settings.

5.1. Configuring the Incoming and Outgoing E-Mail Server

The Open-Xchange Server hosts incoming and outgoing e-mail servers by way of standard internet protocols for the transfer of e-mail. You will most likely want to configure Outlook to make use of your Open-Xchange e-mail account; you may also configure Outlook to connect to additional e-mail accounts, a convenient feature that will allow you to consolidate your e-mail into one, easily accessible location.

5.1.1. A few Notes on E-mail Protocols

The Open-Xchange Server supports POP3 and IMAP for receiving e-mail and SMTP for sending. In general, IMAP is preferred over POP3, as this more robust protocol has a number of advantages over POP3. The IMAP protocol requires the server to store e-mail centrally, whereas with POP3, e-mail is downloaded to the first client that attempts to access it, and is thus rendered inaccessible to other clients or locations that access the account subsequently. A user running Outlook with IMAP will be able to download and read their e-mail and still able to access the very same e-mail through the web mail client from another location. If the user downloads their e-mail with the POP3 protocol, the downloaded messages will no longer be accessible from other locations as they will have been removed from the server. Furthermore, the IMAP protocol features additional functionality useful in a collaborative environment, such as shared mailboxes and folders. As the Open-Xchange paradigm places a strong emphasis on accessibility and collaboration, it is highly recommended that the user access the server with the IMAP protocol.



You will find an extensive review of the various ways in which an Open-Xchange user might want to use the Outlook client with multiple e-mail accounts and the Open-Xchange Server in Appendix A of this handbook.

5.1.2. Configuring an E-mail Account

Outlook supports e-mail connections to a variety of server types. Typically, a user configures an account to use an SMTP server (the outgoing mail server) in conjunction with either an IMAP or POP3 server (both incoming mail servers.) As discussed previously, only SMTP, IMAP, and to a lesser extent, POP3, will be relevant to the average Open-Xchange Server. Owing to the aforementioned preference for IMAP, the following step-by-step guide will concern itself primarily

with the setup of an SMTP/IMAP account with the Open-Xchange Server, though the basic procedure is applicable to other account types and servers.

5.1.3. Mail Configuration Step 1 – The E-mail Account Admin Wizard

Select **Tools | E-mail Accounts** from Outlook's menu bar to launch the wizard that will guide you through the creation of the account. Select the **Add a New E-mail Account** radio button in the window that appears and click **Next**.

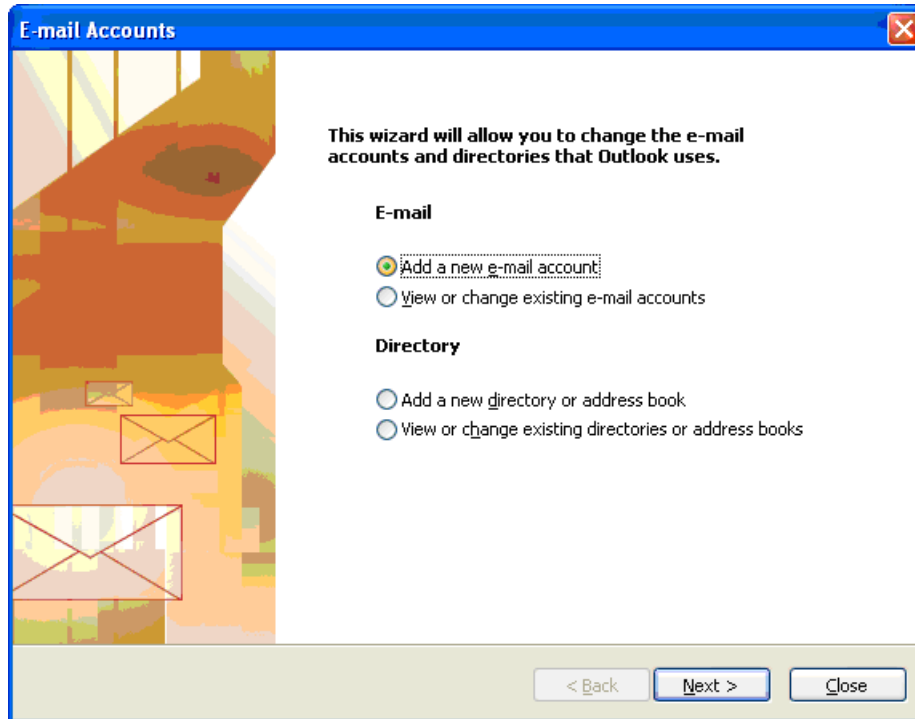


Figure 5.1. Creating a new E-mail Account with MS Outlook

5.1.4. Mail Configuration Step 2 – Selecting a Server Type

In the next step, you will be prompted to select the kind of e-mail you would like to create. In this example, we are setting up an IMAP account for use with the Open-Xchange Server. Select **IMAP** and click **Next** to continue configuring your e-mail account.

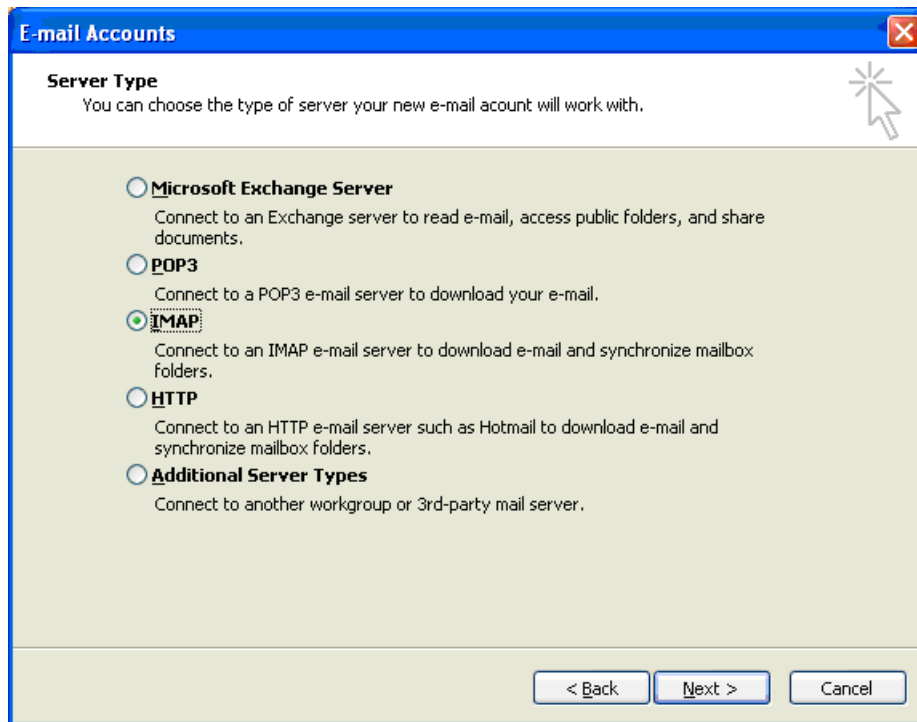


Figure 5.2. Selecting an E-mail Account Type

5.1.5. Mail Configuration Step 3 – Configuring the Server

The following screen will prompt you to enter settings for connecting to your e-mail server. In the **Your Name** field, enter your full name as you would like it to appear in your e-mail. In the **E-mail Address** field, enter the e-mail address that people use to send you e-mail.

In our case, this corresponds to the e-mail address you use to access your Open-Xchange e-mail through the web interface. Typically, an Open-Xchange Server will be configured such that the address of the **Incoming mail server** and the **Outgoing mail server** are the same and both will correspond to the address you use to access the web interface. Enter your incoming and outgoing servers in these fields. If you are unsure of these settings, consult with your network administrator. Click the **More Settings** button to continue configuration.

Mail Configuration Step 4 - More Settings

E-mail Accounts

Internet E-mail Settings (IMAP)
Each of these settings are required to get your e-mail account working.

User Information

Your Name:

E-mail Address:

Server Information

Incoming mail server (IMAP):

Outgoing mail server (SMTP):

Logon Information

User Name:

Password:

Remember password

Log on using Secure Password Authentication (SPA)

Figure 5.3. Configuration of the E-mail Server

5.1.6. Mail Configuration Step 4 - More Settings

Upon clicking the **More Settings** button, a popup window labeled **Internet E-mail Settings** will appear.

In the **General** tab, you will have the opportunity to name the mail account. In our case, we have named it "Open Exchange E-mail", though you are free to use any name you like as this setting only affects how it is displayed under the Outlook folder list. Click the **Outgoing Server** tab to provide additional SMTP configuration and continue to the next step.

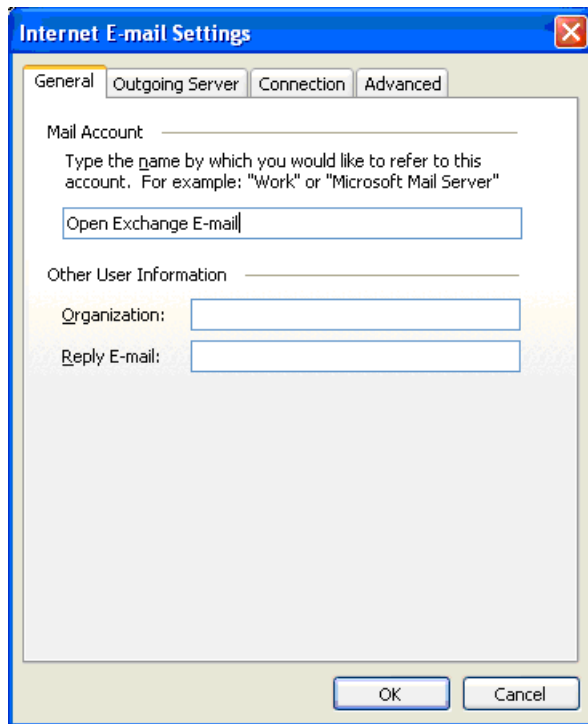


Figure 5.4. Internet E-mail Settings, General Tab

5.1.7. Mail Configuration Step 5 – Additional SMTP Settings

Check the checkbox **The outgoing mail server (SMTP) requires authentication**. Under the **Outgoing Server** tab, activate the option **Use same settings as my incoming mail server**. Confirm the configuration by clicking the **OK** button.

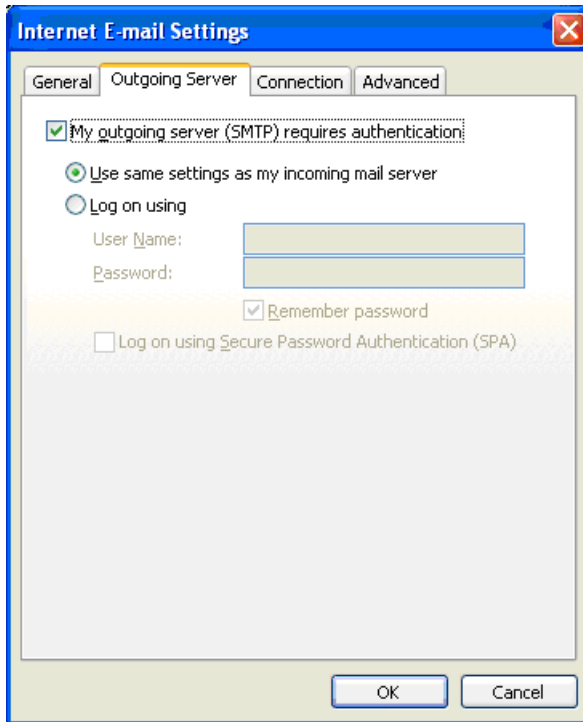


Figure 5.5. Additional SMTP settings

5.1.8. Mail Configuration Step 6 – Finalizing the Configuration

Click the **Next** button on the **E-mail Accounts** window. Click the **Finish** button on the next screen.

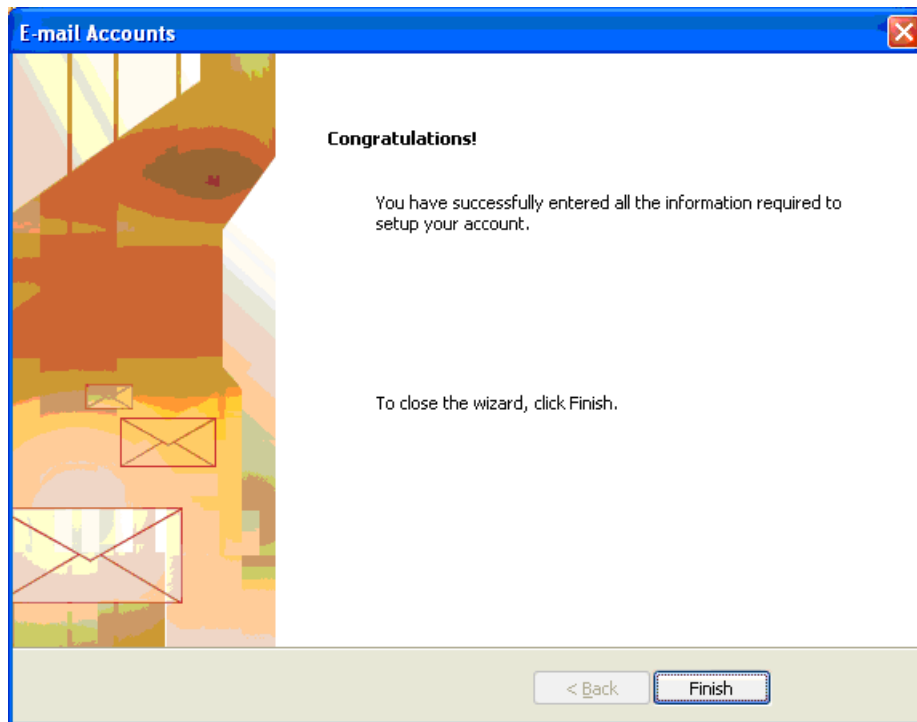


Figure 5.6. Finishing the Configuration

5.1.9. Configuring additional E-mail Accounts

Other e-mail accounts, such as POP3 or additional IMAP accounts can be added by much the same procedure. For example, the user might want to have access to a POP3 account provided by another e-mail provider, and use it conjunction with his Open-Xchange account. Adding such a POP3 account would be a simple matter of following the above procedure but selecting "POP3" in Step 2 and entering the address of a POP3 server as the "Incoming mail server" rather than an IMAP server in Step 3. For important additional information regarding the functional usage of an IMAP account, see Section 5 of this manual.

5.2. Configuring the Free/Busy Service

Free / Busy information can be used in two different ways:

Use the Open-Xchange Server to get free/busy information for all users on the server.
Use the Microsoft Office Internet free/busy Service. A server on the internet will provide free/busy information for all users on the server.

To query the Open-Xchange server free/busy information, no manual configuration is needed. When installing the server specific settings will be used. This comprises defining a free/busy interface. In Outlook the respective modification can be found via the menu bar:

1. In Outlook select **Extras | Optionen | Einstellungen**.
2. Click on **Kalenderoptionen** followed by **Frei/Gebucht Optionen**
3. Im **Suchen unter** enter following address: **http://ox_server_adresse/servlet/webdav.free-busy?username=%NAME%&server=%SERVER%** replace "ox_server_adresse" with your Open-Xchange Server IP address.

If you want to use the Microsoft Office Internet free/busy service for scheduling appointments consult the Microsoft Outlook documentation. Please note that this setting will not automatically be reset, even after deinstalling the OXtender for Microsoft Outlook.

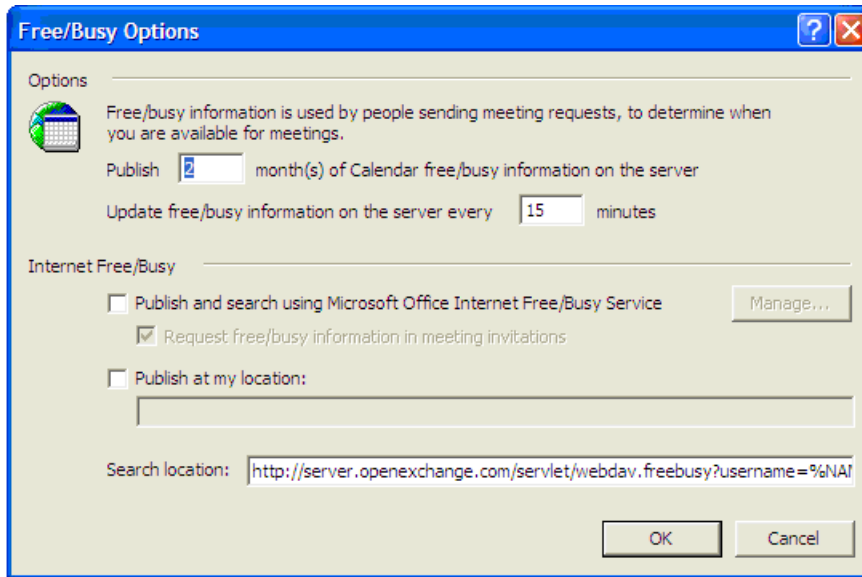


Figure 5.7. Basic Configuration of the Free/Busy Interface



The Free/Busy option only works with the http protocol (not on https)

Kapitel 6. OXtender for MS Outlook plug-ins

OXtender for MS Outlook offers some plug-ins for configuring personal data and setting up mail filters and vacation notices.

The plug-ins are available under the menu entry **Options** in the **Plugins** tab.

6.1. Changing the password

How to change your password:

1. From the list of plug-ins select the entry **OXtender Password Change**.
2. Click the **Configure...** button below the list.
3. Enter your previous password in the entry field **Old password**.
4. Enter a new password in the entry field **New password**.
5. Again, enter the new password in the entry field **Confirm new password**.
6. The **Password strength** indicates how safe the new password is. If the strength is low you might want to enter another password.
7. To save the changes click on **Change**.

Result: The password is changed.

6.2. Mail filter

Mail filters help you organize your incoming E-Mails. With mail filters e.g. following actions can be triggered when receiving an E-Mail:

- The E-Mail is moved to a defined E-Mail folder.
- The E-Mail is forwarded to another E-Mail address.
- The E-Mail is marked as read.

To use mail filters proceed as follows:

- Create an E-Mail folder.
- Create one or more rules.
- Set the order of the rules.
- Set if subsequent rules are to be processed when a rule matches.

A rule consists of:

- A name.
- One or more conditions.
- One or more actions. Set if one or all conditions have to be met to process the actions.

There are the following possibilities to use mail filters:

- Create new rule.
- Show rules.
- Activate or deactivate rules.
- Edit rules.
- Delete rules.

- Change rule order.

How to switch to the plug-in for creating and editing rules:

1. From the list of plug-ins select the entry **OXTender Mail Filter**.
2. Click the **Configure...** button below the list.

Result: The dialog window displays the available rules.

6.2.1. Create new rule

How to create a new rule:

1. In the **Edit Mail Filter** window click on **New**.
2. In the **FilterForm** window enter a name in the **Rule name** text field.
3. In the list field select whether the incoming E-Mail should match all or one of the following conditions.
4. Select the condition by choosing from the 3 drop-down lists. Further information can be found later in this chapter.
5. To set the action that is to be processed if the rule matches click on **Add Action**. Details can be found later in this chapter. To add a further action again click on **Add Action**. To remove an action click on the **Delete** icon next to the action.
6. With the checkbox **Process subsequent rules even when this rule matches** you can control whether or not subsequent rules are to be processed when this rule matches: If subsequent rules are to be processed activate the checkbox. If subsequent rules are not to be processed deactivate the checkbox.
7. Click the **OK** button.

Result: The new rule is displayed in the **Edit Mail Filter** window. The new rule is active.

6.2.1.1. Create condition

Following example describes how to create a condition. The following condition is to be created:

The sender of the E-Mail contains the character string Meier.

How to create the condition:

1. From the first drop-down list below **Of the following conditions:** choose the entry **Sender/From**.
2. From the second drop-down list select the entry **Contains**.
3. In the text field enter the character string Meier.

6.2.1.2. Set action

The following example describes how to set an action. The following action is to be set:

Moving the E-Mail to the **Private** E-Mail folder.

How to set the action:

1. From the drop-down list below **Do the following** choose the entry **Move to folder**.
2. From the second drop-down list select the **Private** folder.

6.2.2. Show rules

Under **Rule name** all existing rules are displayed.

How to display the details of a rule:

In the **Edit Mail Filter** window select a rule. Click the **Edit** button. All conditions and actions for the rule are displayed.

6.2.3. Edit rules

How to change the order of the rules:

1. Under **Rule name** select a rule.
2. On the right side of the window click on **Up** or **Down**.

How to deactivate a rule:

Deactivate the checkbox next to the rule.

How to activate a rule:

Activate the checkbox next to the rule.

How to modify a rule:

1. Select a rule.
2. Click the **Edit** button
3. Change the settings.
4. Click the **Save** button.

How to delete a rule:

1. In the **FilterForm** window select a rule.
2. Click the **Delete** button.

6.3. Changing personal data

How to change your personal data:

1. From the list of plug-ins select the entry **OXtender Personal Data**.
2. Click the **Configure...** button.
3. In the **Personal Information** window select one of the entries **Business**, **Private** or **Additional**.
4. Edit your personal data in the entry fields.
5. To save the changes click the **Save** button.

Result: Your personal data are changed.

6.4. Vacation Notice

Here you can set whether the sender of an incoming E-Mail gets an E-Mail notification when you are absent:

- From the list of plug-ins select the entry **OXtender Personal Data**.

- Click the **Configure...** button.
- **Vacation notice is active.** With this checkbox the vacation notice can be activated or deactivated.
- **Subject.** Here you can enter a subject for the E-Mail notification.
- **Text.** Here you can enter a text for the E-Mail notification.
- **Number of days between vacation notices to the same sender.** Here you can set an interval for sending the vacation notice if there are several E-Mails from the same sender.
- **E-Mail addresses.** Here you can choose an E-Mail address to be used as sender address for the vacation notice.

Chapter 7. Using Outlook and the OXtender for Microsoft Outlook

7.1. E-mail Accounts

When used with a Microsoft Exchange Server, Outlook stores incoming e-mail in the **Inbox** folder found under **Personal Folders**. Similarly, when configured with a POP3 account, Outlook downloads incoming e-mail to this folder. IMAP, however, works somewhat differently. As depicted in the following figure, an IMAP account is represented by a separate, top-level folder outside of the **Personal Folders** list. Here, it has been named **https://ox.open-xchange.com**, though it is possible to modify this name during setup (see **Mail Configuration Step 4** in the last chapter) or by right-clicking on the folder and selecting **Properties**.

In the case of the example setup, e-mail sent to this IMAP account will not appear in the **Inbox** found under **Personal Folders**, rather, it will appear in the **Inbox** under **https://ox.open-xchange.com**. Each configured IMAP account will receive its own top-level folder (although most users will likely only configure one such account—the Open-Xchange Server account.)

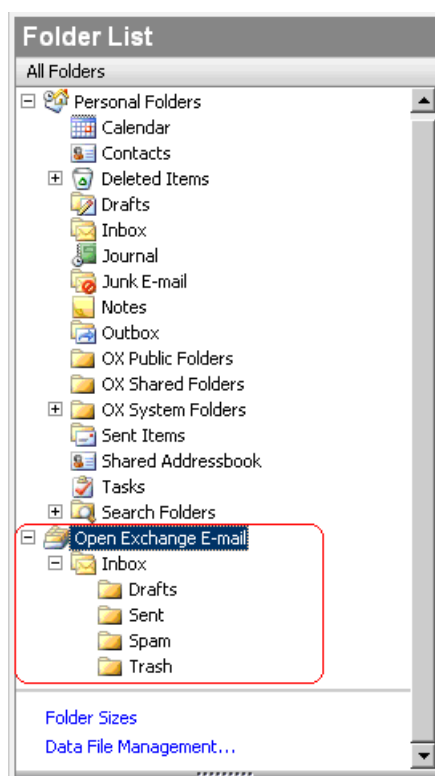


Figure 7.1. The Personal Folders List with an IMAP Account. The IMAP folders are circled in red.

7.1.1. E-Mail Deletion

Aside from having its own folder, IMAP differs functionally from other account setups in one other regard: e-mail deletion. Deleting an e-mail from the **Inbox** found under **Personal Folders** causes the deleted letter to move to the **Deleted Items** folder. Deleting an e-mail from an IMAP **Inbox** does not affect any such move; rather, it stays in place but appears grayed out and with

a line struck through the e-mail's subject and sender. Removing such deleted mail requires the user to select **Edit | Purge Deleted Messages** from the Outlook menu bar.

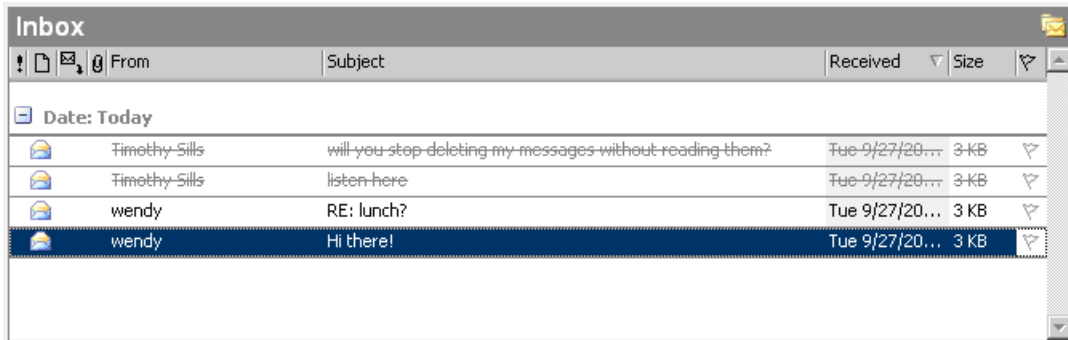


Figure 7.2. Deleted" E-mails in an IMAP Inbox

7.2. Folder Concept

The Open-Xchange Server defines several types of folder:

- Private folders (OX Private folders)
- Public folders (OX Public folders)
- Shared folders (OX Shared folders)
- System folders(OX System folders)

Selecting the **Folder List** view from the lower left-hand corner of the Microsoft Outlook Window will allow you to explore the **OX Public Folder**, the **OX Shared Folder**, and the **OX System Folder** (in previous Microsoft Outlook versions you open the folder tree with **View -> folder list**).

Private folders refer simply to any other folder you place in the folder list, including Contacts, Calendar, and Tasks, that are set up for each user by the Open-Xchange Server.

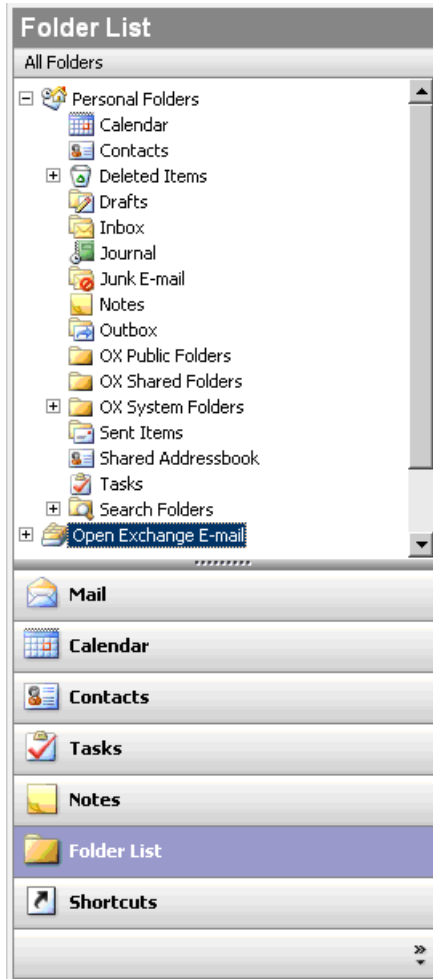


Figure 7.3. Selecting the Folder List view allows one to browse the Open-Xchange folders.

If a folder contains unread elements - e.g. new e-mails - the number of unread elements will be displayed next to the folder name and the folder name will be displayed in bold letters.

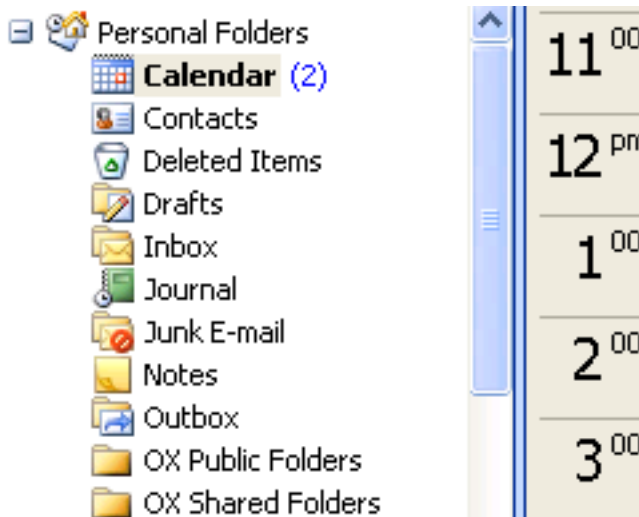


Figure 7.4. Number of unread messages next to folder name

As an alternative the whole number of folder elements can be displayed. To do so proceed as follows:

1. Right-click on the folder and choose **Properties**.
2. In the **General** tab choose the option **Show number of all elements** and click **OK**.

The number of elements in the folder will be displayed with green font in square brackets next to the folder name.

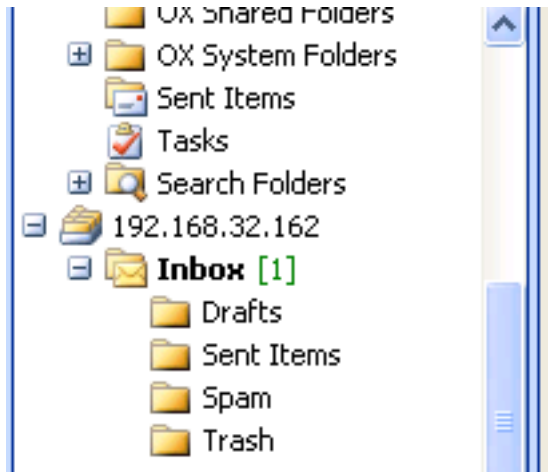


Figure 7.5. Number of all elements next to folder name

7.2.1. Private Folders

Private folders are essentially folders which hold only one user's data and are accessible only for that user. By default, each user has three private folders after installing Open-Xchange Server: Contacts, Calendar, and Tasks, each of which are named after their corresponding folder type. Users have the option of creating more private folders of type contact, task, or event. A user's private folders can be shared such that other users can be granted access to the folder. The sharing is done by defining access permissions for a folder. A user's shared private folders are displayed to users to whom proper access has been granted under the heading **OX Shared Folders** in Outlook.

7.2.2. Shared Folders

Shared folders are the private folders of another user to which you have been granted access. Whether you have write access, delete access, or read-only access for any given shared folder depends on the folder's configuration of access permissions. By default, the shared folders of other users in Outlook are listed with the following syntax: **User name – folder name**.

To view objects in a shared folder the folder has to be opened twice.



Please note: Contents marked as **private** will not be visible for other users, even if saved in a shared folder.

7.2.3. Public Folders

OX Public Folders contains a list of all folders that are not bound to a particular user. Public folders are intended for the storage of schedules, contacts, and tasks that should be available to multiple users. Which users and user groups have access to a public folder is determined by the folder's access permissions.



Please note: Contents marked as **private** will not be visible for other users, even if saved in a shared folder.

7.2.4. System Folders

System folders are folders provided by Open-Xchange Server that are visible to all users. Two different system folders are found under **OX System Folders**:

Global address book
Shared address book

The folder **OX Global Address Book** includes all system users with accounts on the Open-Xchange Server. This corresponds to the global address book in the Web interface. The **OX Shared Address Book** contains contacts that should be made available to all users.

7.3. Creating Folders

7.3.1. Creating Private Folders

To create a new private folder or subfolder, right-click anywhere in the folder list (except under OX Public Folders, OX Shared Folders, or OX System Folders) found under **Personal folders**. From the context menu that appears, select the entry **New Folder...** A dialog appears in which you can configure the new folder. In the **Name** field, enter the name of the private folder to be created. Using the dropdown box labeled **Folder contains**: select the type of data to be stored in the new private folder. If you choose the option **Contact, Task, Calendar** as element type, a private folder will be created that can be accessed via the web interface of the Open-Xchange Server.



The folder types **Notes** and **Journal** are not natively supported by Open-Xchange Server.

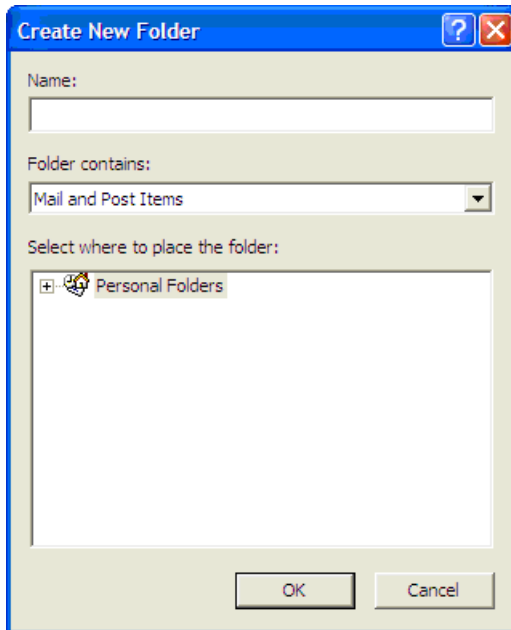


Figure 7.6. Creating a private Folder

7.3.2. Creating Public Folders

A public folder is created in much the same way that a private folder is created—only it is made inside the folder **OX Public Folders**. To create a public folder, right-click the **OX Public Folders** folder and select **New Folder...** In the resulting dialog box, define the folder's name and the type of items it will contain.

7.4. Deleting Folders

To delete a folder, right-click the folder in the Outlook folder list. In the resulting context menu, select **Delete folder**. Outlook will ask you to confirm the deletion of the folder.

7.5. Folder Permissions – Public Folders

Every public and shared folder on the Open-Xchange Server has its own permissions. These are used to determine which users and user groups can read, change, and delete content in the folder or the folder itself.

7.5.1. Sharing a Folder and Changing its Permissions

To change folder access permissions, a user needs ownership privileges over the folder in question. The folder's permissions can be changed by right-clicking the folder in the Outlook folder list and selecting **Properties** in the context menu. Select the **Share** tab to define the access permissions.

7.5.1.1. User Selection

The upper list shows all the users for which access permissions are defined on the currently selected folder. Select a user from this list to display his or her access level in the lower part of the configuration window. You can change the access permissions for the selected user, either by way of the pull down menu **Permission Level** - there are eight predefined permission levels - or by checking the control checkboxes directly to define custom permission level.

7.5.1.2. Adding a User

To add a new user to the list of permissions holders for a given folder, click on the **Add** button. In the dialog that appears, you will see two columns. The left column displays a list of all users and user groups defined on the Open-Xchange Server. In the right column are all the users for whom access permissions have been defined for the folder. To add more users, select the users or groups in the left column for whom you would like to grant permissions. By clicking on the **Add >** button, you can move the users into the list of permission holders. To remove users from the list, mark the users in the right column and click on the **Drop** button. When you have finished, confirm the changes by clicking on the **OK** button. Please note that for newly added users, there are initially no access permissions defined; once a user has been added to the permission list you are able to manually define permissions for that user.

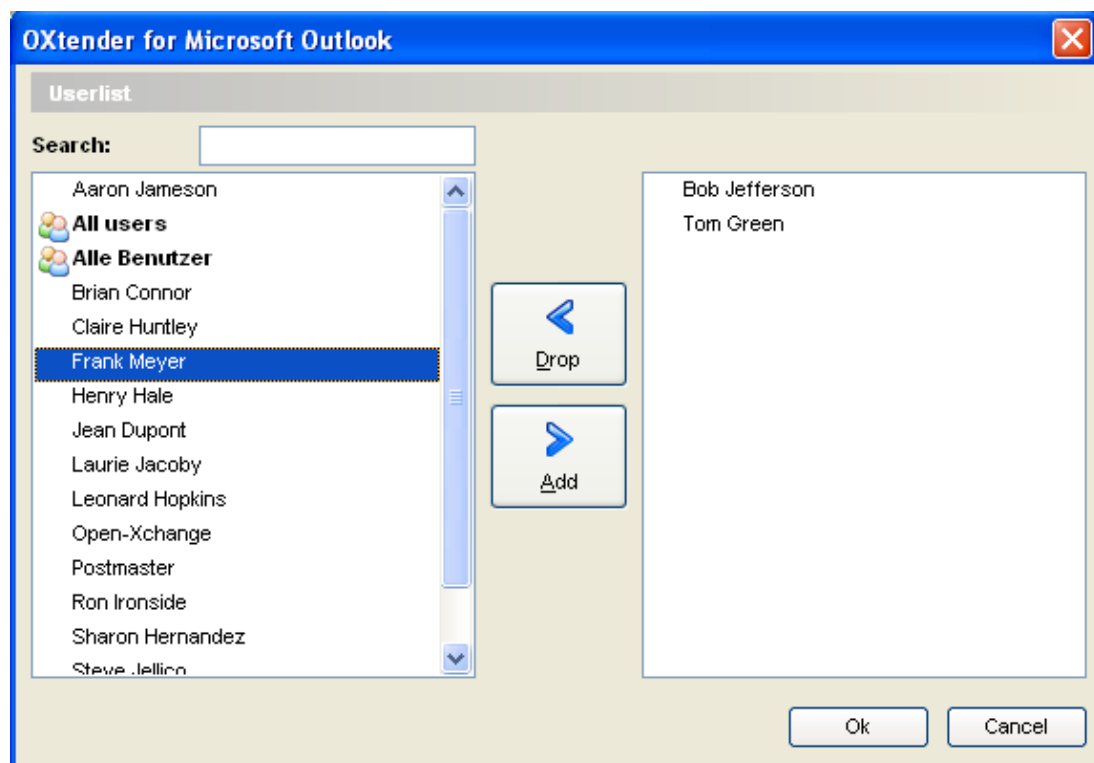


Figure 7.7. Adding Users and User Groups to the List of Permission Holders

7.5.1.3. Permission Level "None" - View objects

In this access level, the shared folder is visible for the given user. However, the user no other access right. The user may not open, edit, or delete objects or settings in the folder, nor may the user create subfolders.

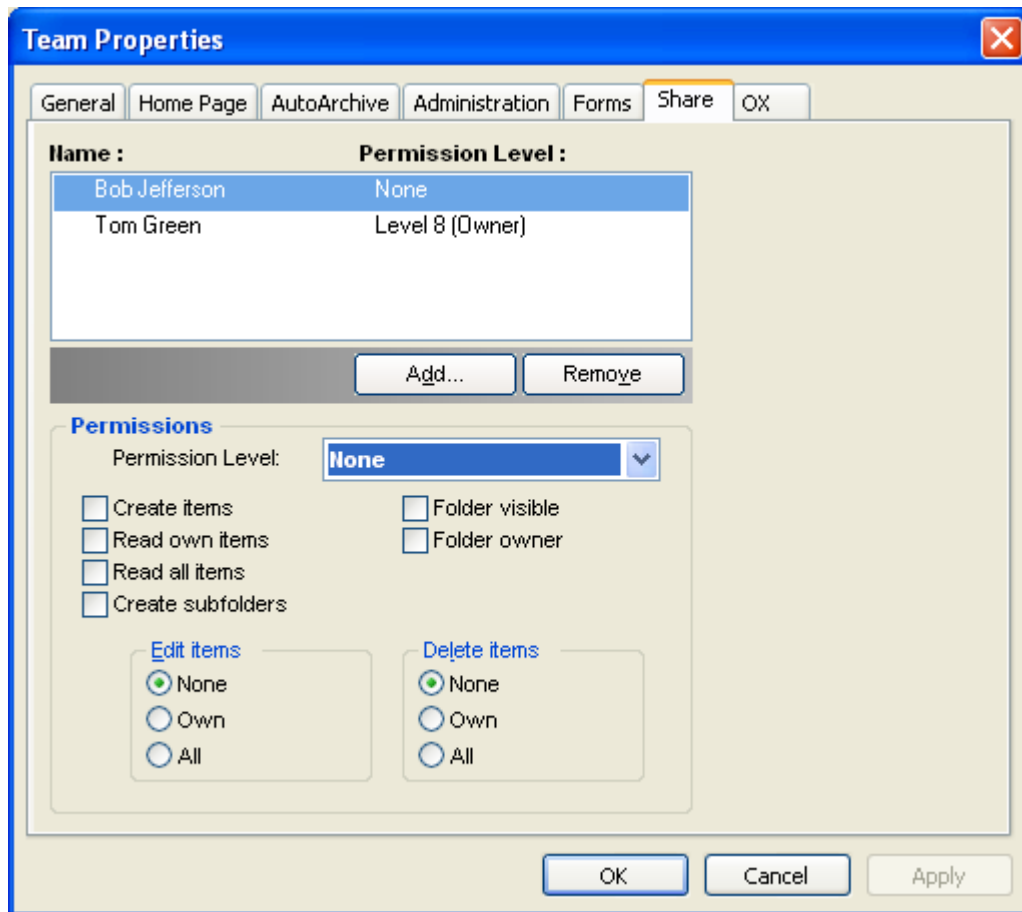


Figure 7.8. Permission Level "None"

7.5.1.4. Permission Level 1 - Create Objects/Items

This permission level allows the selected user to create new items in the folder, but not read or change any item - regardless of whether he created them or not.

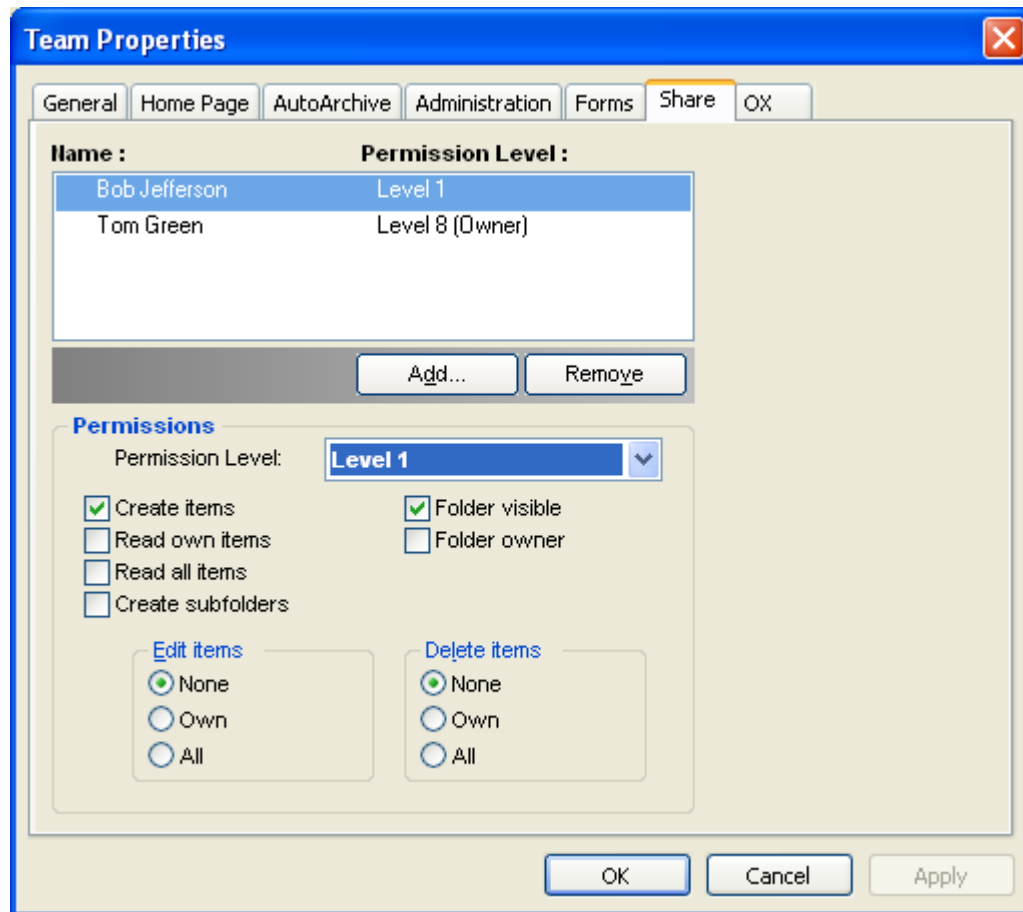


Figure 7.9. Access Permissions for a Folder at Permission Level 1

7.5.1.5. Permission Level 2 - Read Objects/Items

This permission level allows the selected user to read items in the folder, regardless of who created them. The creation of new items, however, is not permitted at this level; nor is the editing or deletion of existing items. Subfolders cannot be created by users with this permission level.

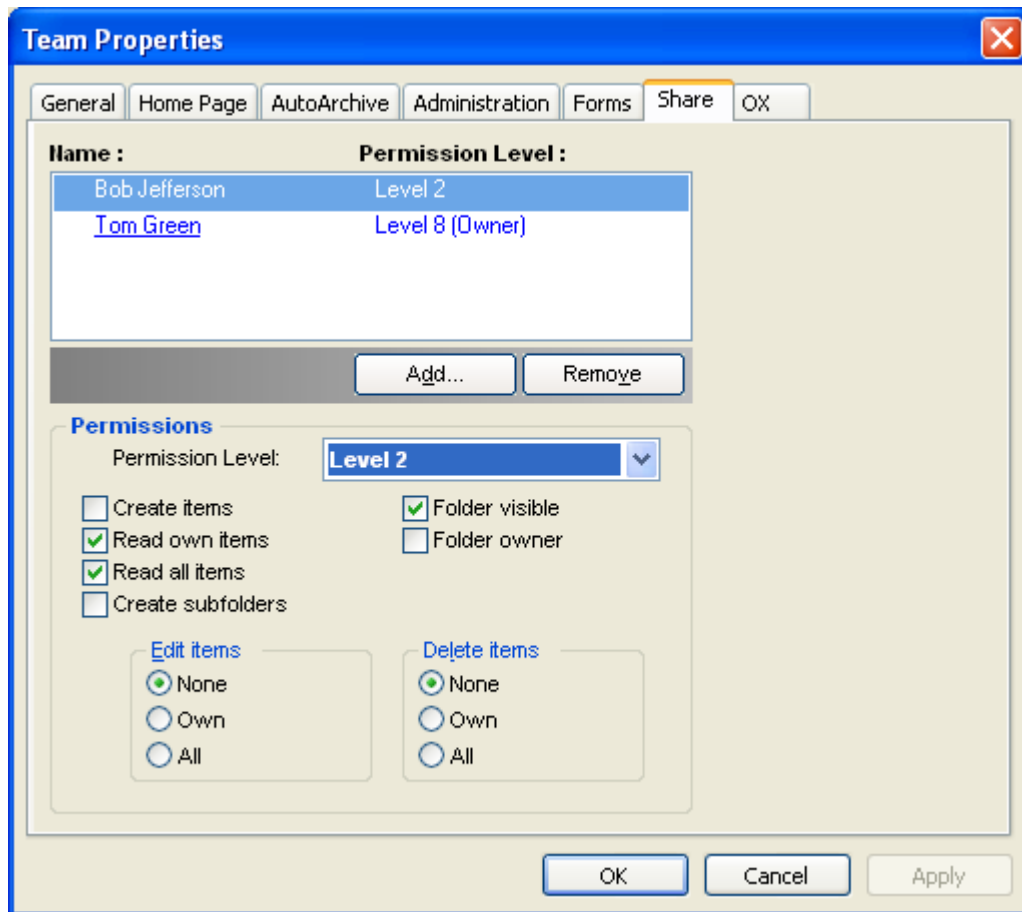


Figure 7.10. Access Permissions for a Folder at Permission Level 2

7.5.1.6. Permission Level 3 - Create and Delete own Objects

Users granted permission level 3 have all the access privileges of level 2, but are also able to create or delete - but not edit - their own items in the folder. In a public contact folder, for instance, the user has the ability to read all contacts. The user can also create contact entries. Changes to contacts, however, are not permitted.

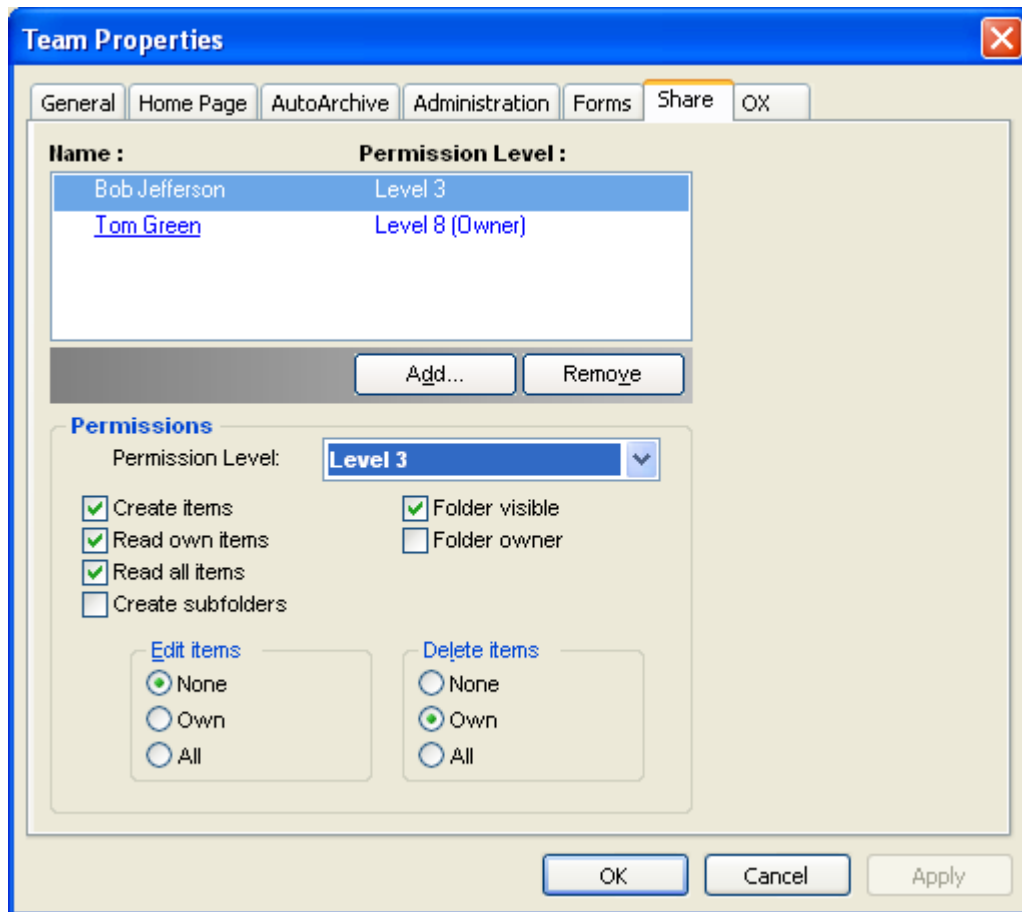


Figure 7.11. Access Permissions for a Folder at Permission Level 3

7.5.1.7. Permission Level 4 - Edit own Objects

Permission level 4 is much like permissions level 3, except users are also able to edit their own items.

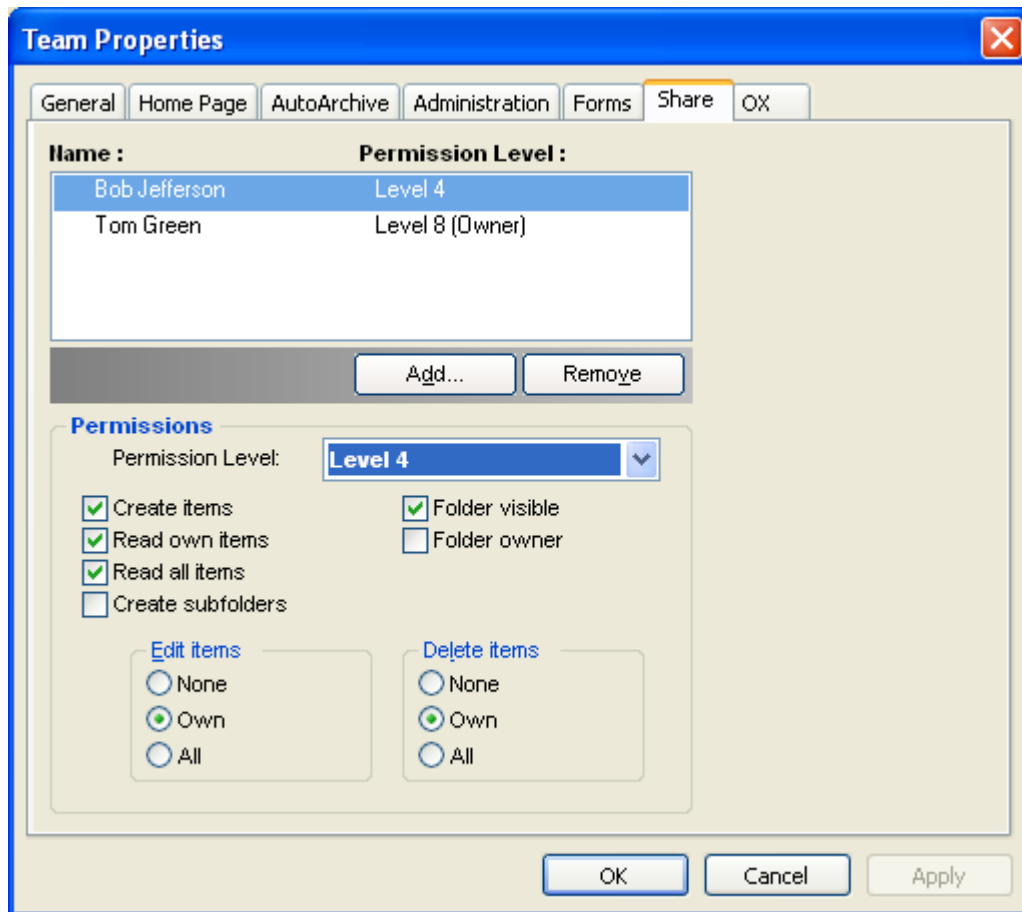


Figure 7.12. Access Permissions for a Folder at Permission Level 4

7.5.1.8. Permission Level 5 - Add Subfolders

At permission level 5, the users have the same access permissions as in level 4 but are also permitted to add subfolders to the folder.

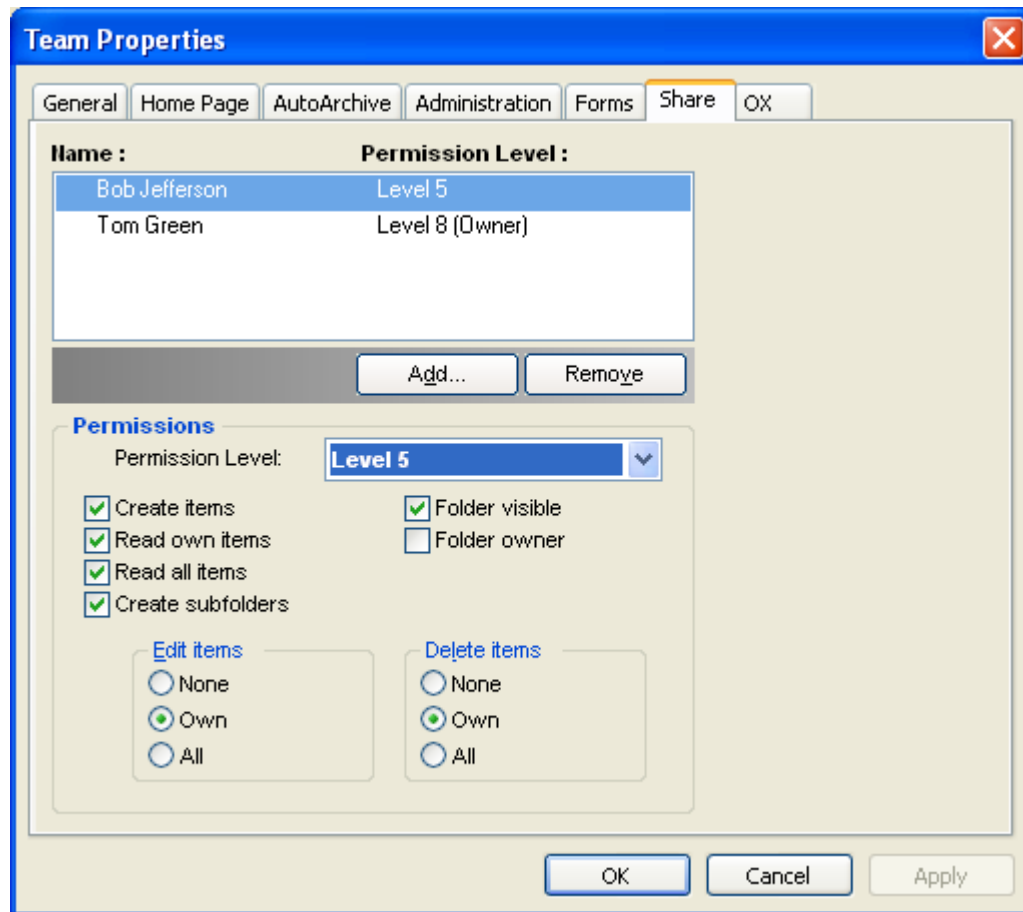


Figure 7.13. Access Permissions for a Folder at Permission Level 5

7.5.1.9. Permission Level 6 - Edit/Delete foreign Objects

At permission level 6, users may create items and edit and delete all items, regardless of the creator. The only limitation at this level is that users may not create subfolders.

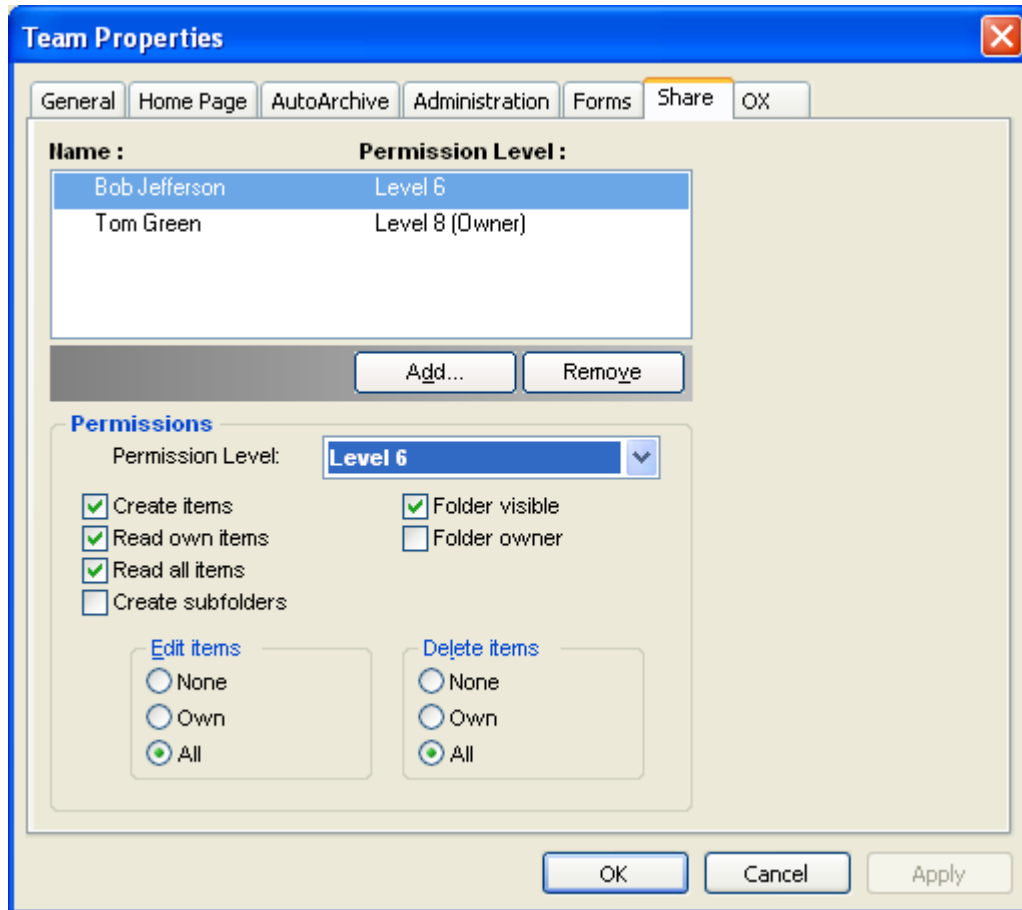


Figure 7.14. Access Permissions for a Folder at Permission Level 6

7.5.1.10. Permission Level 7 - Full Access

Permission level 7 is identical to permission level 6, but without the restriction on the creation of subfolders. Users at this level have full access to the folder, but cannot change the access permission themselves.

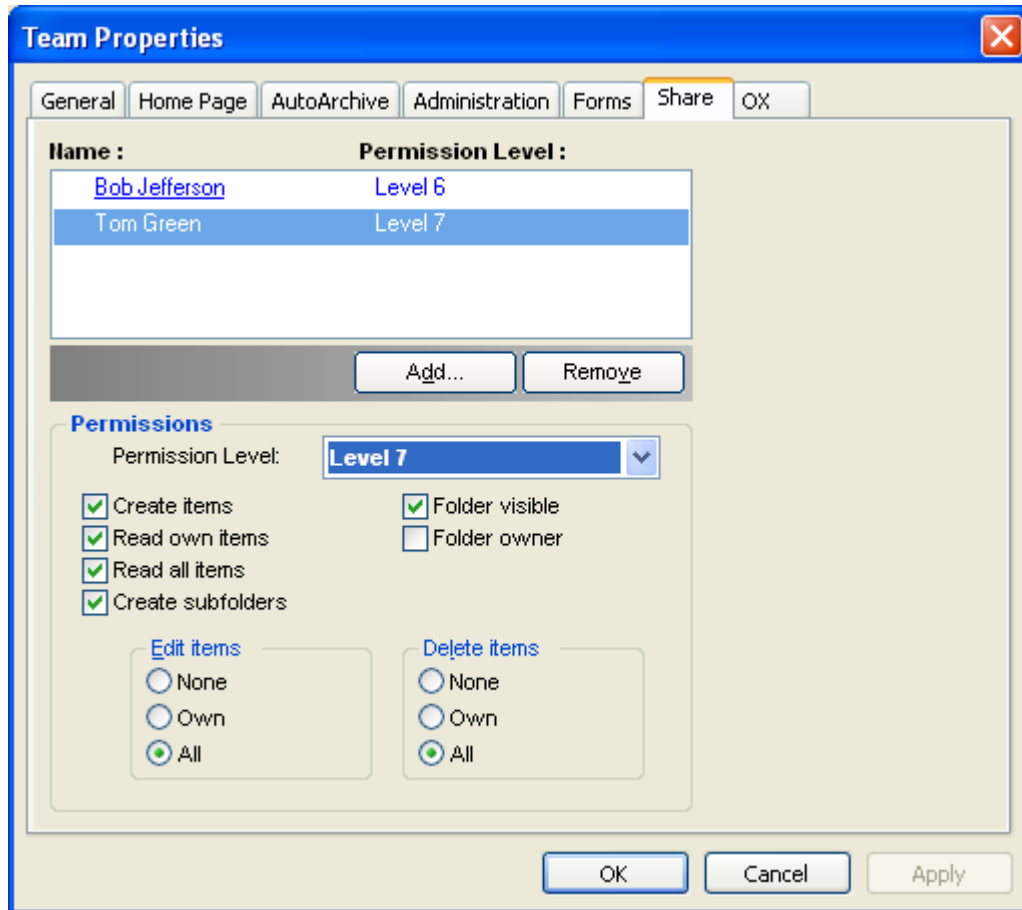


Figure 7.15. Access Permissions for a Folder at Permission Level 7

7.5.1.11. Permission Level 8 - Folder Owner

At permission level 8, the user is made owner of the folder, meaning that he or she is able to edit access permissions to the folder. Naturally, this user is granted all the access rights of permission level 7.

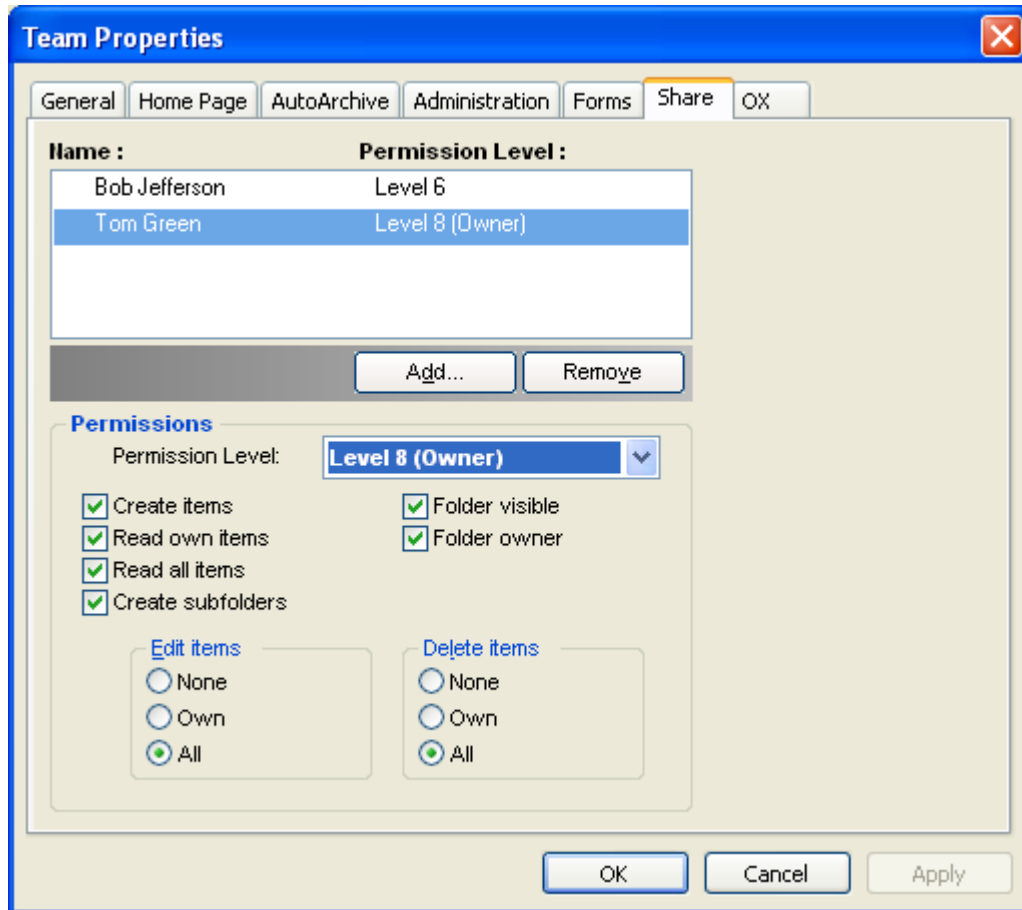


Figure 7.16. Access Permissions for a Folder at Permission Level 8

7.6. Contact Folders

In order to enable access to your various contacts folders from the calendar and other interfaces in Outlook, right-click on the folder in the Outlook folder list and select **Properties** from the resultant context menu. In the **Outlook Address Book** tab, check the box **Show this folder as an e-mail Address Book**. The contact folder can now, for instance, be used as a source of participants in the creation of meetings. At the very least, you should **activate** the folder **OX Global Address Book** so that system users on the Open-Xchange Server are accessible from other parts of Outlook client.



The folder **OX Global Adressbook** will be automatically accessible for all set up system users on the Open-Xchange Server. This folder does not need to be activated. You can immediately access the global addressbook, e.g. for writing e-mails or sending invitations.

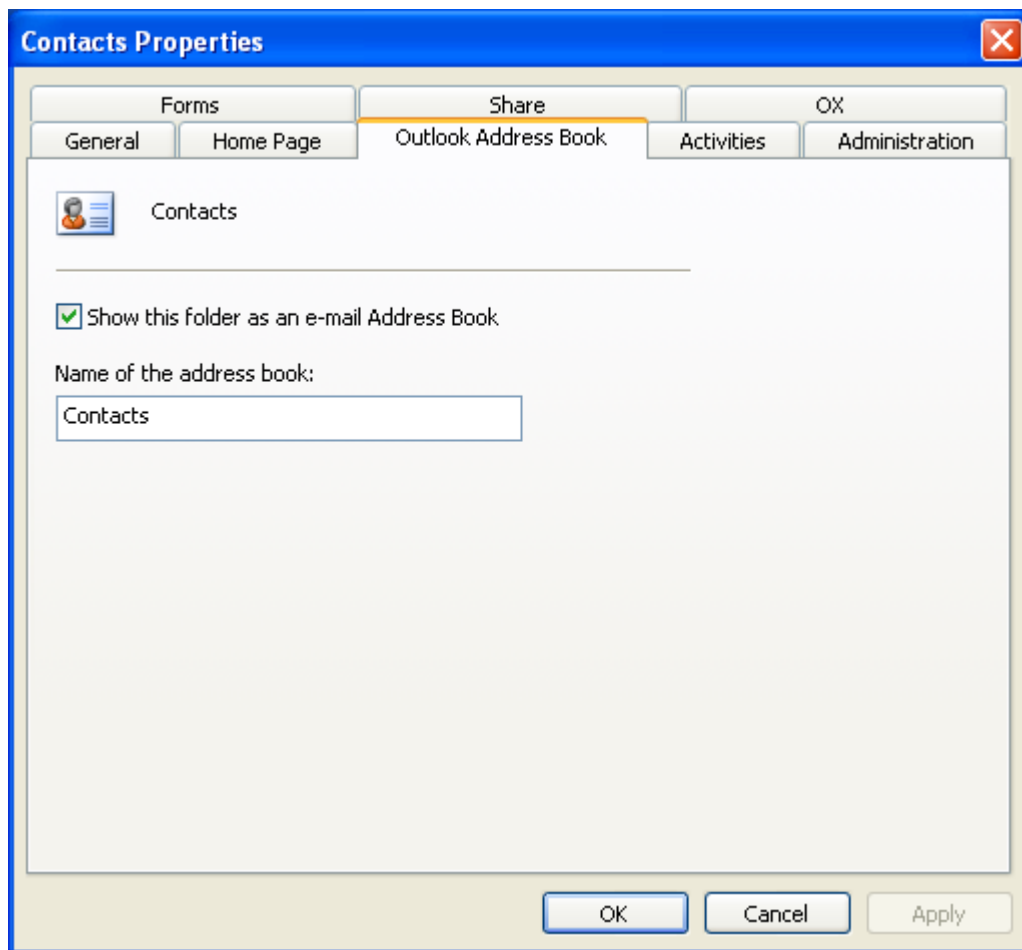


Figure 7.17. Using a Contact Folder as an E-mail Address Book

7.7. Manually synchronize folders

The OXTender automatically synchronizes each folder that makes available Open-Xchange Server data, as soon as changes are made on the server. Additionally, you can manually synchronize single folders. To do so proceed as follows:

1. Right-click on the folder.
2. In the menu **Eigenschaften** open the tab **OX** and click on **Slowsync**.
3. Each folder element will be synchronized with the Open-Xchange Server.

7.8. Appointments

7.8.1. Creating Appointments

To create a new appointment, first click with the left mouse button in the Outlook folder list on the desired calendar folder. In the calendar view, switch to the day on which the appointment should be created and click and drag the mouse to select the block during which the appointment will occur. Next right-click on the time range, now highlighted in blue, and select the **New Appointment** item. It doesn't matter whether you are working in a private, public, or shared folder, as long as you have sufficient access permissions.

7.8.2. Defining Appointments

In the resulting dialog box, enter all the basic data for the new appointment. In the **Subject** text field, give the appointment an appropriate title. In the **Location** field, enter where the appointment will take place. You also have the option of changing the scheduling or creating an **all-day** appointment. Using the reminder function, you can make sure that Outlook will remind you of the appointment just before it is to take place. You can configure how this appointment affects the free/busy data associated with this timeslot by way of the **Show time as** dropdown. You can also use the **Label** dropdown to attach an additional colored label. Using the large text field, you can enter additional information and notes for the appointment. If an appointment should be assigned to other contacts, you can add them via the **Contacts** button. With the **Categories** button, you can assign the appointment to a predefined category.

To hide an appointment to other users activate the checkbox **Private** in the bottom right corner.

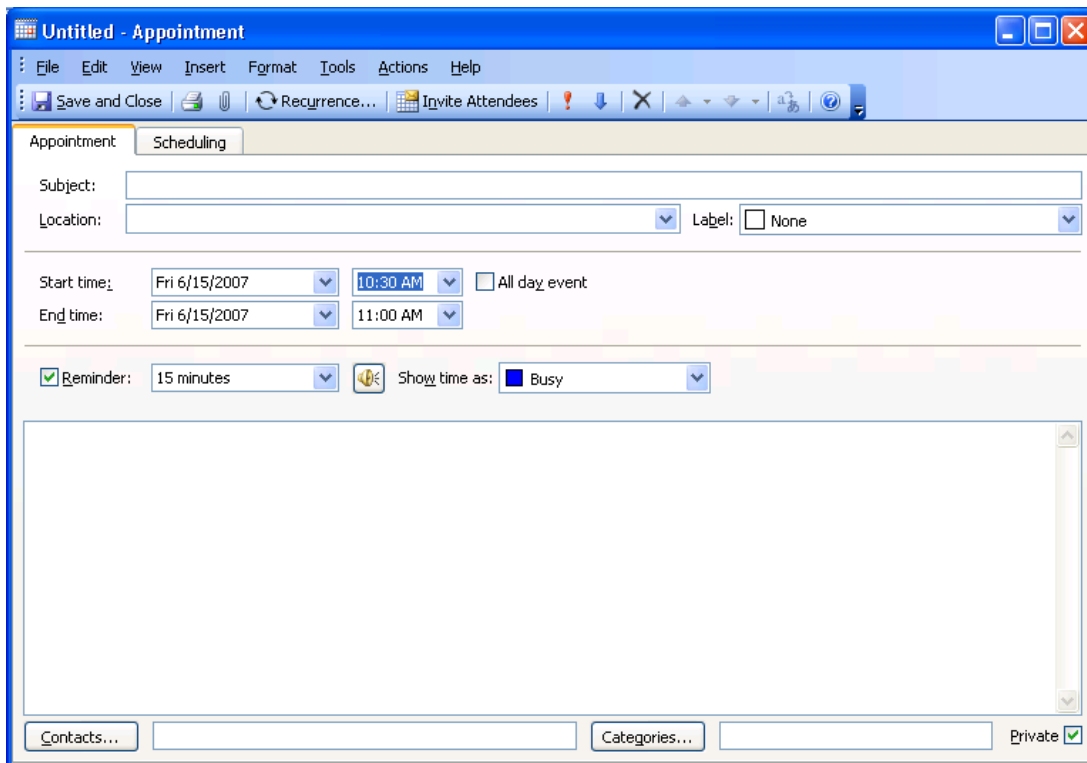


Figure 7.18. Creating a new Appointment in MS Outlook

7.8.3. Scheduling

Click on the **Scheduling** tab to add new participants to the meeting and to ensure that they are all available at the desired time. The view in this configuration window is broken down into two areas. In the left-hand column, all participants that have already been added to the meeting are listed. In the right-hand column, the availability of all the selected users in the defined time window is displayed. If the participant is available at the desired time, Outlook displays this with a corresponding bar. To add more users, click on the **Add Others** button. In the dialog which appears, you can select the desired participants from the address books to which you have access (and have been activated). In order to select system users as participants, use the contact folder **OX Global Address Book**. Mark the desired participant or a group and click on the **Required** button. Unfortunately, the **Optional** button does not work in the current version. Once you have added all participants, confirm the selection by clicking the **OK** button.

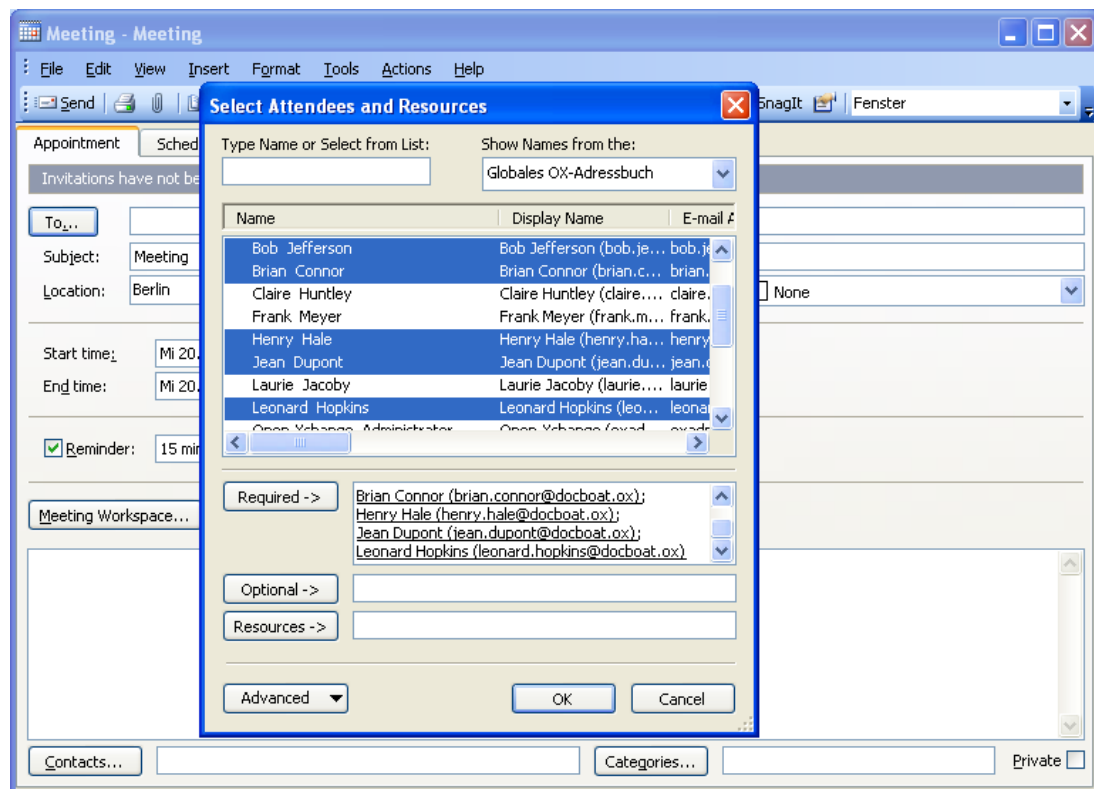


Figure 7.19. Selection of Participants for a new Appointment

Please note: When creating an appointment in Outlook while not being connected to the OXtender the participants are invited twice:

1. from Outlook
2. from the OXtender after connecting with Outlook

7.8.4. Creating recurring Appointments

To create a new recurring appointment, first right-click on the calendar view. From the context menu, select the "New recurring appointment" item. In the resulting configuration window, you will have the option of determining the date upon which the recurring appointment should start, and when it should end. You also have the option of selecting an interval at which this appoint-

ment should take place. You can create daily, weekly, monthly, or even yearly appointments, and you can select fixed times or weekdays for them. Once you have determined and confirmed the desired settings, the remainder of the process is identical to that involved in creating a regular appointment.



Adding attachments to serial exceptions is not possible.

A serial appointment and an exception of the same series can not be displayed at the same day in Microsoft Outlook.

If, in the browser based interface of the Open-Xchange Server, you move a serial exception to a day that already contains a serial appointment of this series, only the exception is displayed in MS Outlook, not the serial appointment.

As soon as you move the serial exception to a day that does not contain a serial appointment of this series, the serial appointment is displayed again in Microsoft Outlook.

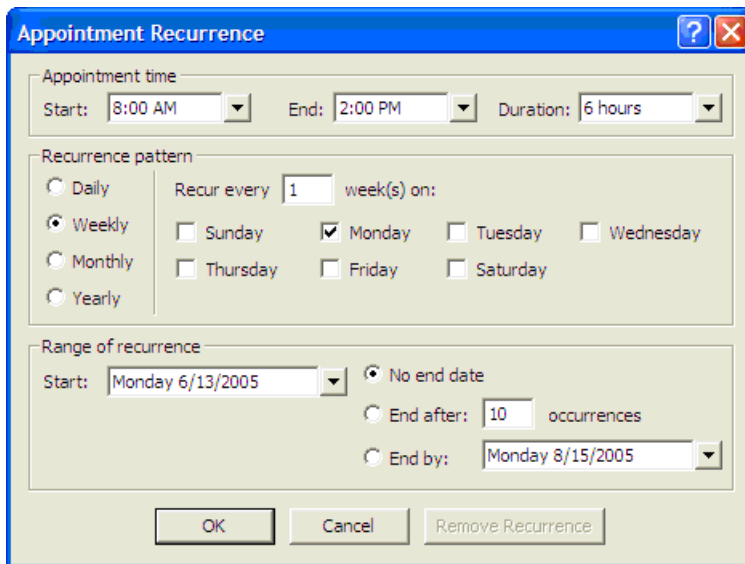


Figure 7.20. Creating a recurring Appointment

7.8.5. Edit incoming meeting request

If another user invites you to a meeting you will be informed by e-mail. Double-click on the message to open it.

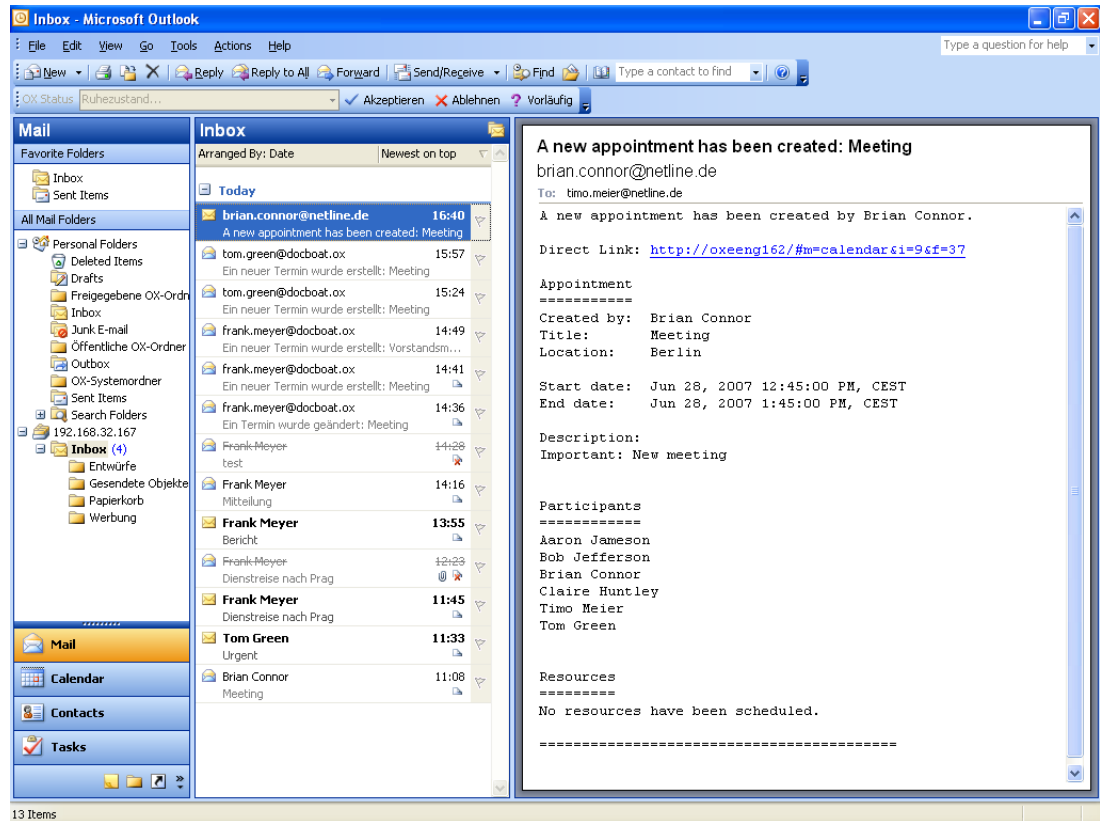


Figure 7.21. Edit incoming meeting request

To accept the appointment on the given date click on **Accept**. The appointment will be entered in your calendar and the sender will receive a confirmation.

To temporarily accept the invitation click on **Temporary**. The appointment will be entered in your calendar and the sender will receive a confirmation that you will probably take part.

To refuse the invitation click on **Refuse**. The appointment will not be entered in the calendar.

To send an additional message to the sender enter it in the entry field.

Click on **OK** to send your answer to the meeting invitation.



You can also edit the appointment status in your calendar at a later point of time.

For further information please refer to **Meeting request** in the Outlook online help.

7.9. Deactivate/activate the OXtender

You can deactivate or activate the OXtender via the Windows task bar. To do so proceed as follows:

1. In the task bar info area right-click on the OXtender icon.
2. Click on **Deactivate** to deactivate the OXtender and to interrupt the communication with the Open-Xchange Server.
3. Click on **Activate** to re-activate the OXtender. All Open-Xchange folders will be re-synchronized with the server.

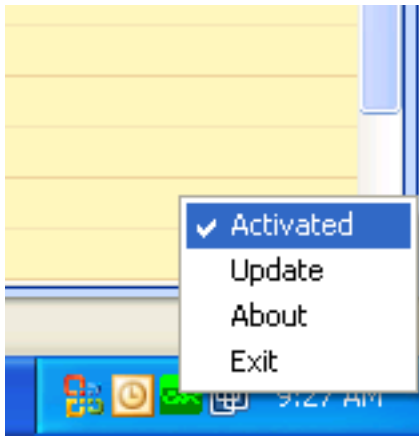


Figure 7.22. OXtender in the task bar

Chapter 8. Best Practices - Working with IMAP Mailboxes

As discussed in earlier sections of this manual, working with IMAP mailboxes is somewhat different from working with regular mailboxes. The information in this section is provided in hopes of facilitating ease-of-use of IMAP mailboxes.

8.1. Permanently delete messages

Deleting e-mail messages in an IMAP mailbox supposes that you mark the e-mails to be deleted first, and that they will be deleted later. Afterwards the deleted messages appear grayed and crossed out. Thus, the e-mail messages are however not yet finally deleted.

In Microsoft Outlook® 2003 select **Edit | Purge deleted messages** from the menu.

In Microsoft Outlook® 2007 select **Edit | Delete | Delete marked messages**.

Depending on your Microsoft Outlook® version there are different possibilities to simplify the permanent deletion of a message:

- In Microsoft Outlook® 2003 you can add a purge button to the toolbar.
- In Microsoft Outlook® 2007 you can add a purge button to the toolbar. As an alternative you can set the option to purge elements that are marked as deleted when leaving the folder.

8.1.1. Permanently delete in Microsoft Outlook® 2003

How to add a Purge button to the toolbar:

Select **Tools | customize** from the Outlook menu bar. In the appearing dialogue click on the **Commands** tab and select the **Edit** You must now find the entry **Purge Deleted Messages** in the right-most list field.

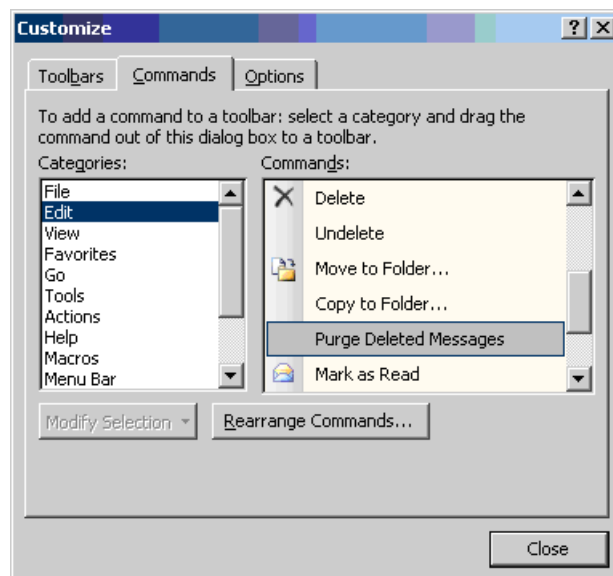


Figure 8.1. The Customization Window

Click and Drag **Purge Deleted Messages** to Outlook's toolbar. Close the **Customize** dialog window. The result will look something like the following image:

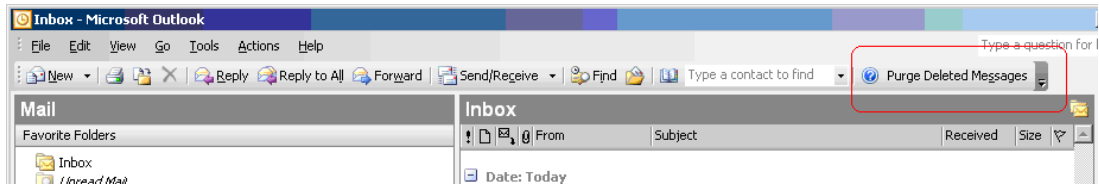


Figure 8.2. The Outlook Toolbar with a Purge Deleted Messages Button.

8.1.2. Permanently delete in Microsoft Outlook® 2007

How to add a Purge button to the toolbar:

Select an IMAP folder e. g., the **Inbox** folder. From the Microsoft Outlook® menu select the entry **Extras | Customize**. In the **Customize** dialog window select the **Commands** tab. Select the entry **Edit**. Under **Delete** in the list field to the right there is the entry **Purge items marked for deletion in Inbox**.

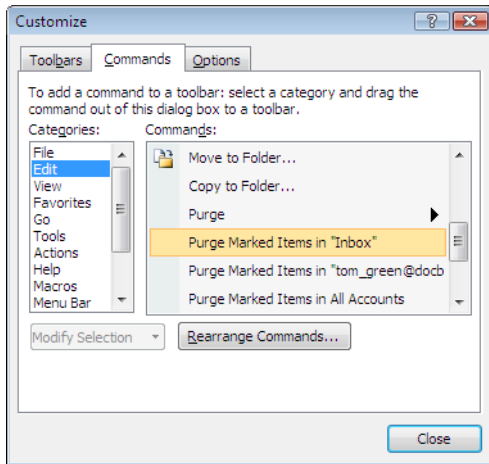


Figure 8.3. The Customize window

Use drag and drop to move the icon to the toolbar. Close the **Customize** dialog window. Following image shows the result:

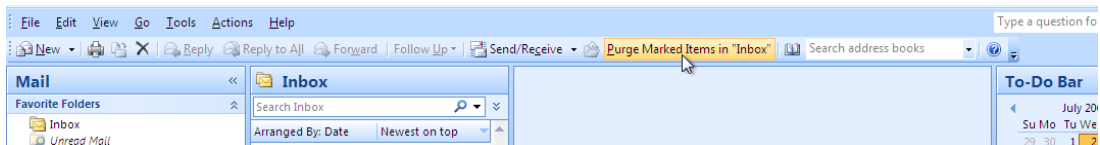


Figure 8.4. The toolbar with the Purge items marked for deletion in Inbox button.

How to purge items marked for deletion when leaving the folder:

Select an IMAP folder e. g.; the **Inbox** folder. From the menu select **Edit | Delete | Options**. From the **Internet E-mail settings** window select the **General** tab. Activate the **Purge items when switching folders while online** checkbox. Close the dialog window.

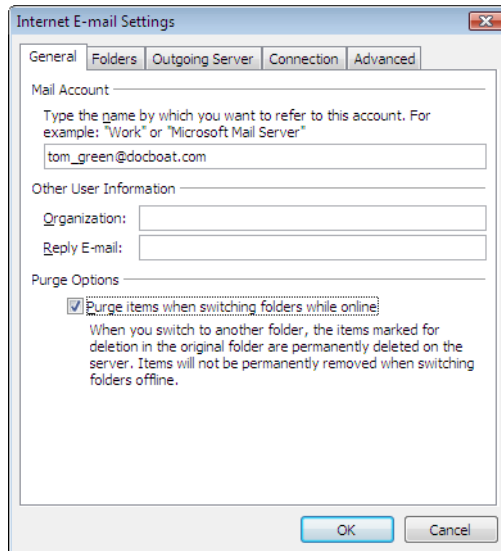


Figure 8.5. The Internet E-mail settings window

8.2. Mirroring Folders

There are certain peculiarities associated with the manipulation of IMAP folders in Outlook. For example, sending e-mail from an IMAP account results in the sent message being copied into the **Sent** folder under the **Personal Folders** at the top of the folder list, rather than the **Sent** folder under the actual IMAP account. This is undesirable, but can be accommodated for with the use of a simple Outlook rule.

To take another example, we may want to forward all e-mail sent to a POP3 account to our IMAP mailbox, so that our personal internet e-mail will be accessible through the Open-Xchange Server. To accomplish the latter example, try the following procedure:

Highlight the name of the folder containing e-mail you want automatically forwarded from the folder list on the left side of the Outlook client. In our case, we will want to select **Inbox** under **Personal Folder**. Select **Tools | Rules and Alerts** from the menu bar.

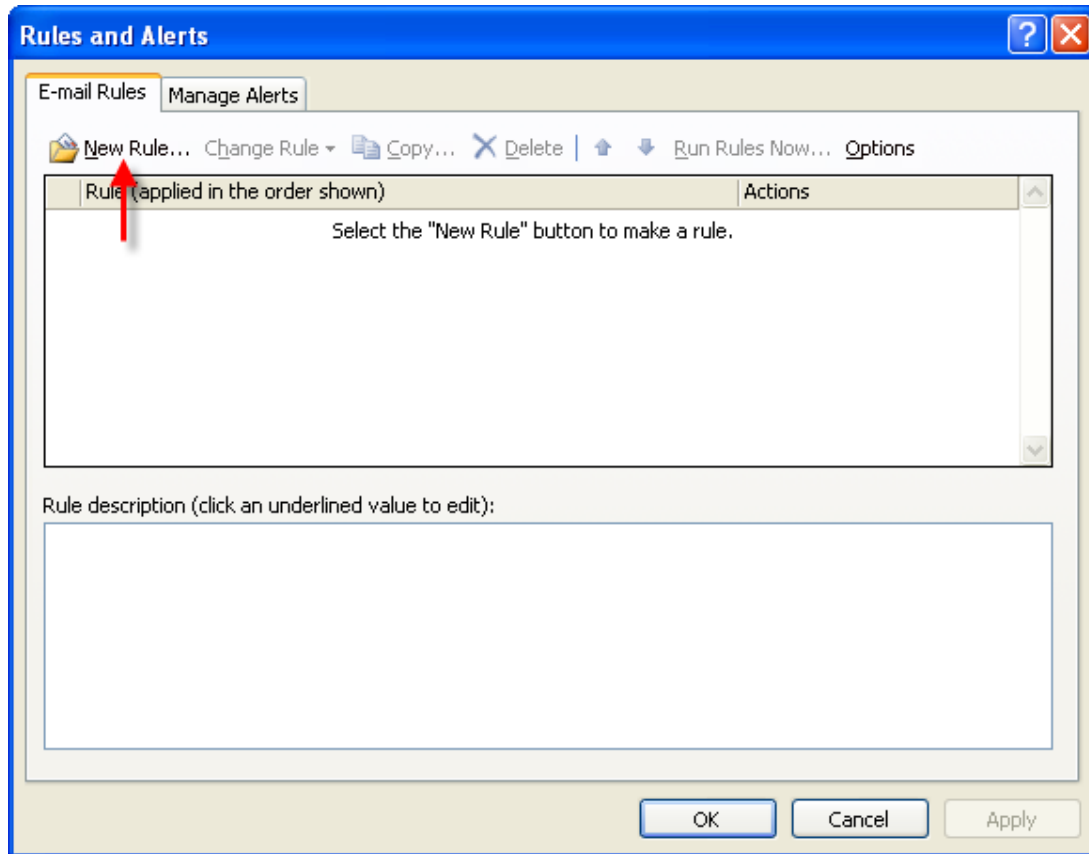


Figure 8.6. The Rules and Alerts Window

Click on the **New** button and select the entry **Start from a blank rule**. In the upper list field select the entry **Check messages when they arrive** and click on the **Next** button.

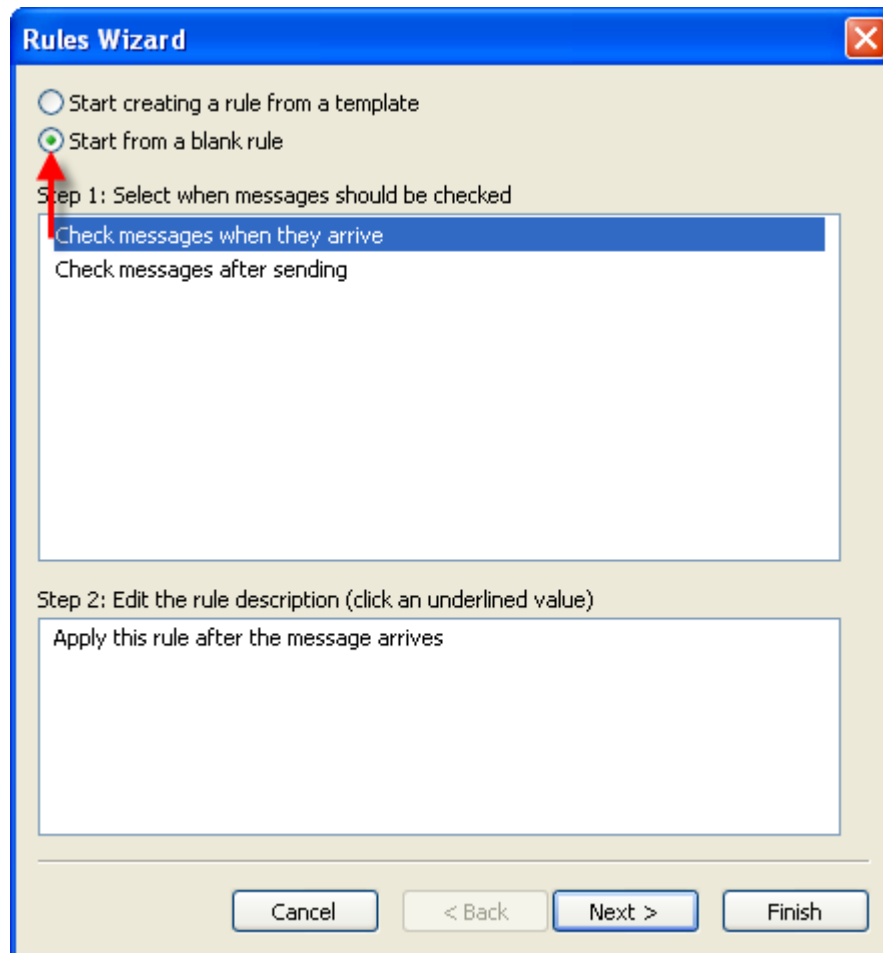


Figure 8.7. The Rules Wizard - Creating a New Rule

In the next window choose the entry **Only on this machine** at the bottom of the list and click on **Next**.

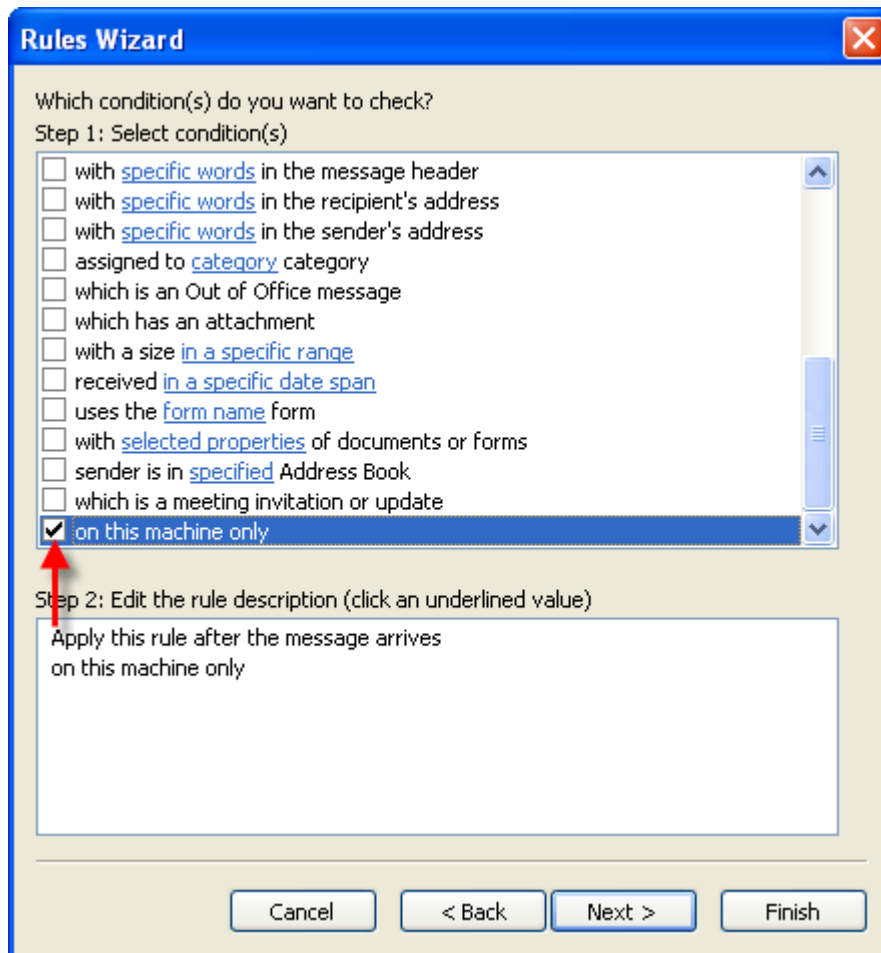


Figure 8.8. Rules Wizard - Conditions

In the next window select **move it to the specified folder** or **move a copy to the specified folder** from the list, depending upon whether you'd like to move the e-mail or copy it to the IMAP folder, as in Figure 5. Next, click on the blue text underlining the word specified:

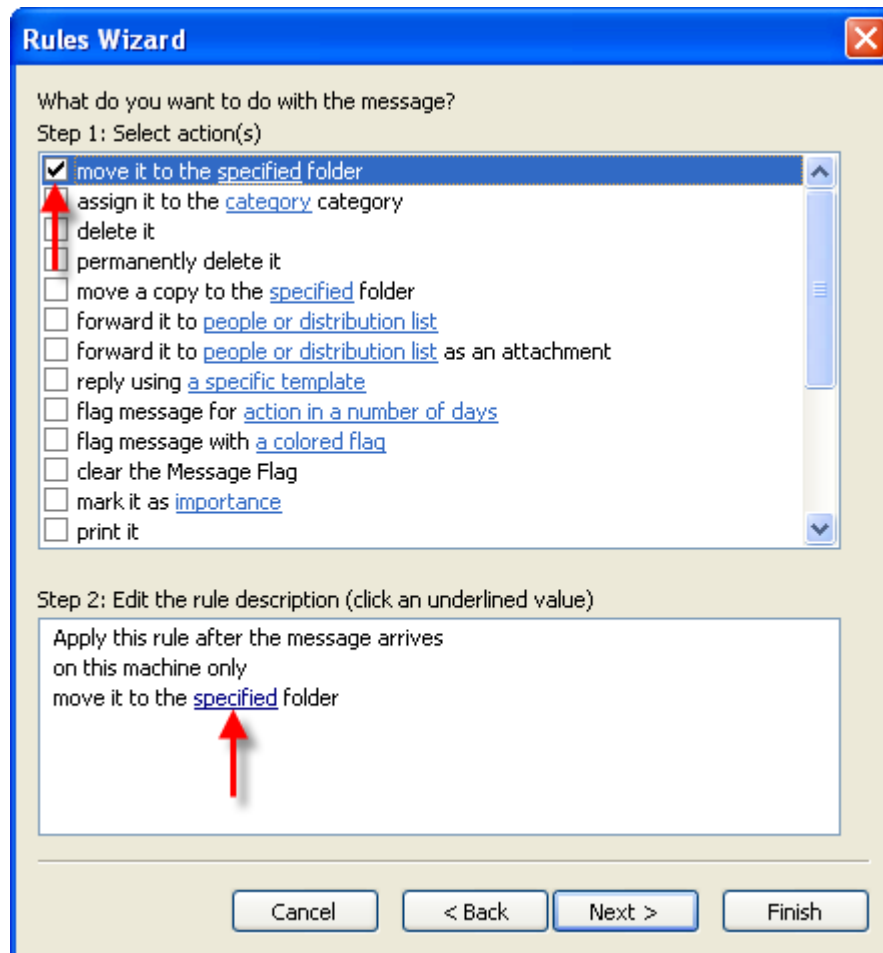


Figure 8.9. Rules Wizard - Actions

In the resulting popup window, select the IMAP Inbox to which you wish to move incoming e-mail. In our example, we are copying Wendy's POP3 mail to our Inbox on the Open Exchange IMAP Server. Click **OK**.

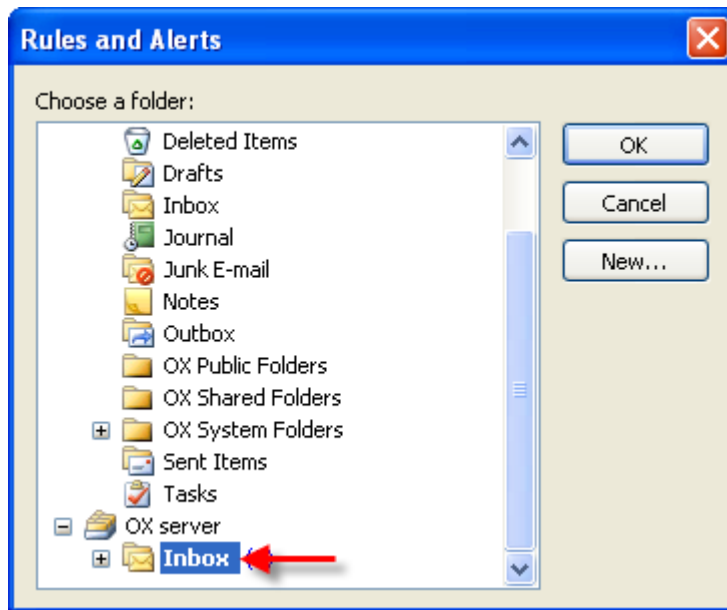


Figure 8.10. Target for Incoming Mails

The next window will ask if we want to create any exceptions to this rule. Simply click **Next**. In the next screen we are given the opportunity to name our rule. In our example, we have named it mailbox consolidation (which describes what we are trying to accomplish) and we have selected, **Run this rule now on messages already in Inbox**. This means that the rule will be executed on mail already in this Inbox, as opposed to just mail received after the creation of the rule.

Click on **Finish**. Close the Dialog window with **OK**.

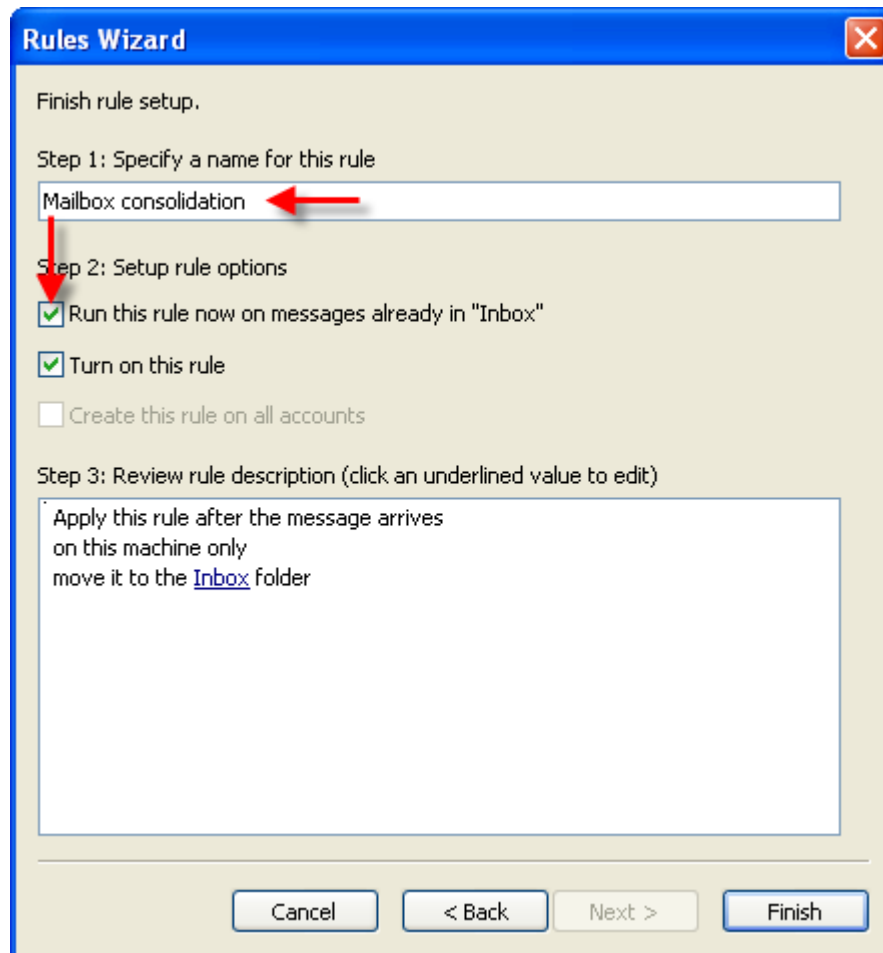


Figure 8.11. Rules Wizard - Finish

Chapter 9. Appendix A: Client-/Server-Szenarien

9.1. Use Model 1: POP3/SMTP Only

Open-Xchange Server includes a POP3 "receive" e-mail module and a SMTP "send" e-mail module.

Under the POP3/SMTP Only use model, MS Outlook is configured with a POP3/SMTP Account. When the user activates the Send/Receive button, the MS Outlook client retrieves e-mail from the Open-Xchange Server and sends e-mail through the Open-Xchange Server. Once the e-mail is retrieved from the Open-Xchange Server, it is only stored in MS Outlook in the Inbox folder on the client in other words, the POP3 account in Open-Xchange is emptied. Sent e-mails are also not only stored on the MS Outlook client in the Sent folder.

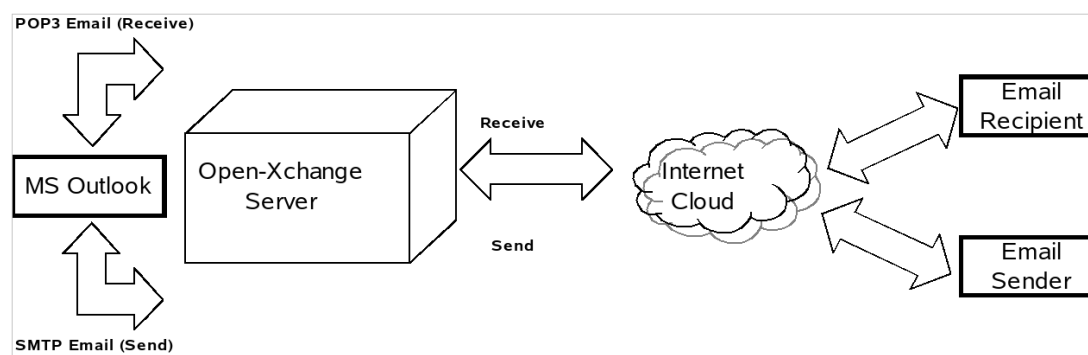


Figure 9.1. Peer-to-Peer Use Model

In this use model, calendar entry can only be shared via e-mail and only with other MS Outlook users. The calendar entry is created in the MS Outlook calendar module and after activating the **Invite Attendees** feature and selecting **Participants**, sent via the **Send** command / button via e-mail to the participants. Upon receipt, MS Outlook users can **Save and Close** the calendar entry or appointment directly to their calendar.

Contacts can also be shared via e-mail. After opening a **Contact**, under the **Actions** menu, the user can **Forward as vCard**. This opens a **New Message**. After selecting a recipient in the **TO:** dialog box, the user activates the **Send/Receive** command or button. The recipient can save the vCard directly to his or her Contacts by selecting the **Save and Close** command or button.

9.2. Use Model 2: Multiple POP3/SMTP Accounts

MS Outlook can also be configured to receive and send e-mails to multiple POP3/SMTP servers. The Multiple POP3/SMTP Only use model includes the Open-Xchange Server as one of many e-mail accounts that connect with the MS Outlook client.

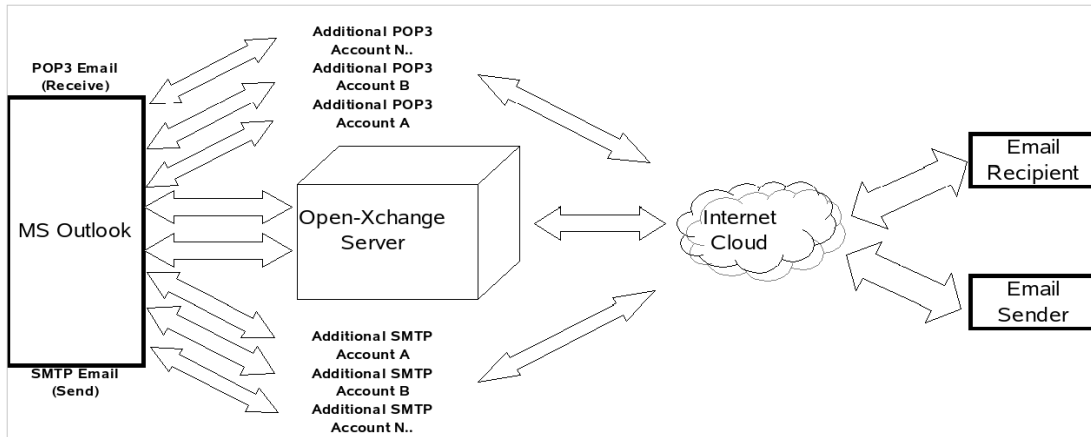


Figure 9.2. Multiple Peer-to-Peer Use Model

9.3. Use Model 3: IMAP Account

Open-Xchange Server includes the collaboration features such as calendar, contacts, and tasks and messaging features such as e-mail and folders that can be fully synchronized with MS Outlook. To implement synchronization, the user needs to install the OXtender for Microsoft Outlook on his or her desktop, laptop or supported mobile device. The OXtender for Microsoft Outlook handles the synchronization of calendar entries, contacts, folders and tasks between MS Outlook and Open-Xchange Server. E-mail is synchronized using an IMAP account.

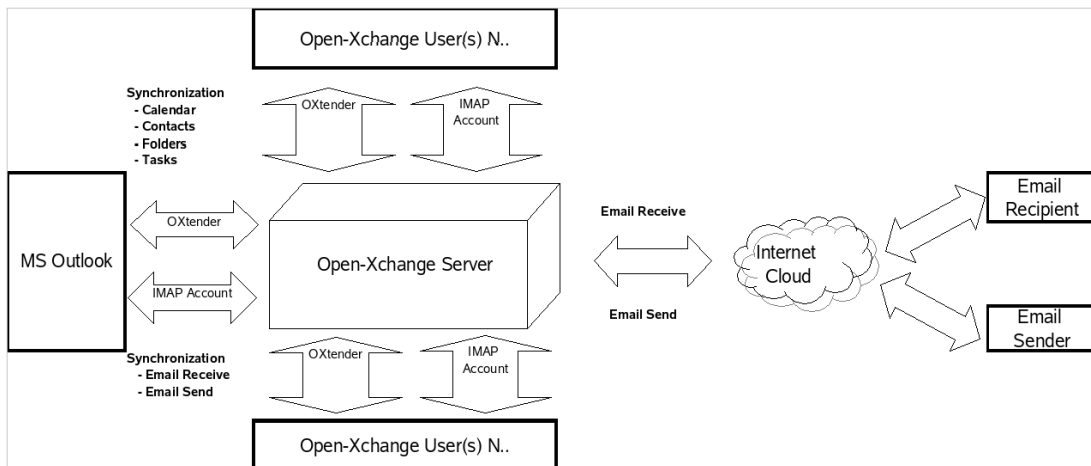


Figure 9.3. Client-Server Use Model (IMAP only)

Synchronization of calendar entries, contacts, folders and tasks occurs automatically in the background or can be effected immediately by switching screen views and then returning to the original screen.

E-mail is synchronized each time the **SEND/RECEIVE** command or button in MS Outlook is used.

Using the IMAP Only use model will expand and enhance the FOLDER structure in Outlook. In another section of this manual, a description of the changes in the folder structure is presented.

9.4. Use Model 4: Multiple IMAP Only

Some users may have the need to synchronize e-mail and folders with multiple IMAP servers. This is easily done with a MS Outlook client that is also synchronized with the Open-Xchange Server. Simply create an additional IMAP account in MS Outlook.

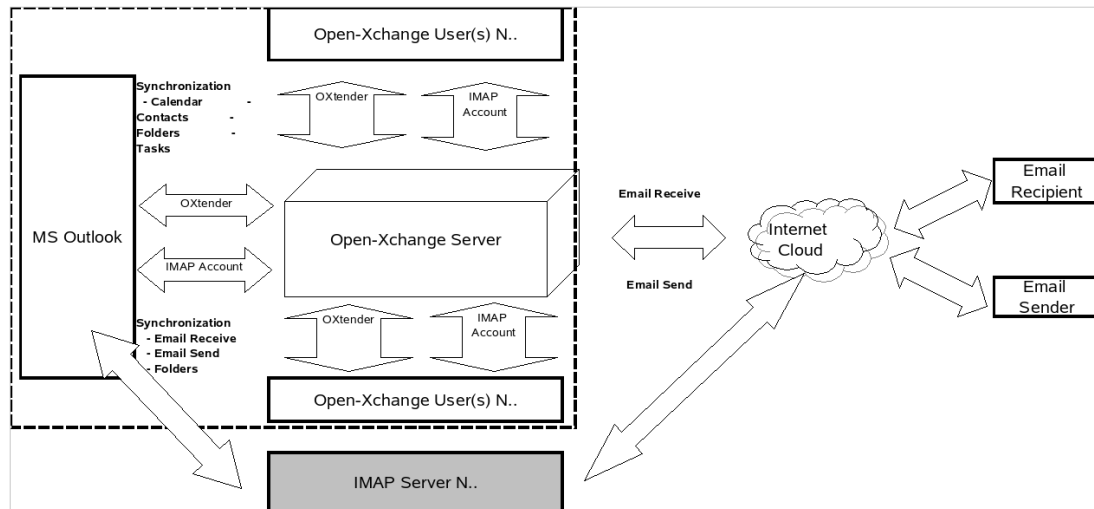


Figure 9.4. Multiple Client-Server Use Model (Multiple IMAP Only)

Creating additional IMAP account expands the FOLDER structure by one IMAP folder for each account. Separate IMAP folders CANNOT be synchronized. So multiple IMAP accounts are typically used to maintain separate e-mail boxes and/or identifies.

9.5. Use Model 5: Mixed Peer-to-Peer/Client-Server OXtender/POP3

Using MS Outlook, the Open-Xchange can also be used in a mixed peer-to-peer / client-server use model. In this use model, calendar entries, contracts, folders and tasks are synchronized automatically through the OXtender for Microsoft Outlook, while e-mail is forwarded back and forth from the server to the client INBOX using POP3 and SMTP protocols.

This use model saves disk space on the centralized Open-Xchange by forwarding and storing e-mail on the MS Outlook client at the edge of the network or system. Since many end-users have excess disk space on their desktops and laptops, this model can be an efficient use of storage capacity. One important drawback of this use model is that e-mail back-up has to be handled at the individual client level, instead of centrally.

Use Model 6: OXtender/IMAP/POP3

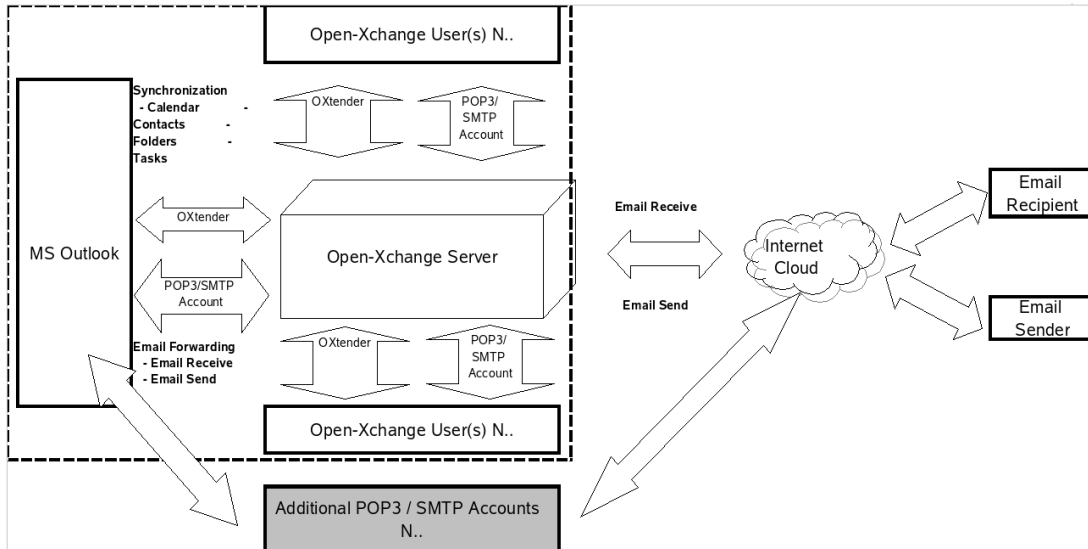


Figure 9.5. Mixed Peer-to-Peer/Client-Server Use Model OXtender/POP3

9.6. Use Model 6: OXtender/IMAP/POP3

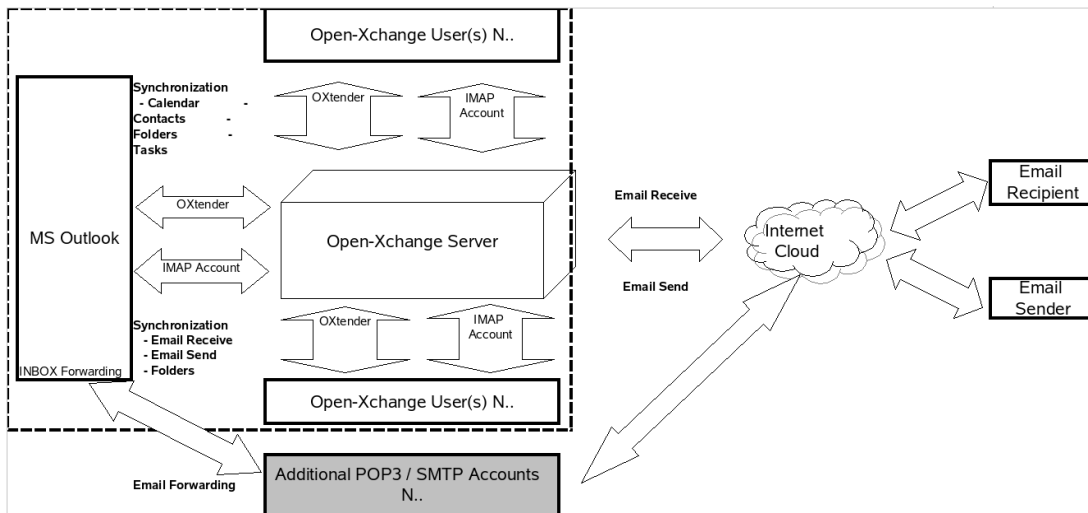


Figure 9.6. Mixed Peer-to-Peer Client-Server Use Model 2 - OXtender/IMAP/POP3

The OXtender/IMAP/POP3 use model combines the benefits of synchronization with a central server with the flexibility of having multiple POP3/SMTP accounts or identities. For example, personal and business accounts can be commingled, synchronized and backed up centrally in this use model. In addition, server anti-virus and anti-spam utilities can be used to manage POP3 e-mail streams.

Outlook OXtender is designed to fulfill exactly this need. Users who use MS Outlook as a groupware client use it not to create, open, and work with their e-mail, but instead their tasks, appointments, and contacts. To work with their e-mail messages, they can use MS Outlook in the usual way. In MS Outlook they must simply create a new POP3 or IMAP account in which they define the Open-Xchange Server as their incoming mail server. In addition, they can also enter the Open-Xchange Server into Outlook as a completely normal SMTP outgoing mail server. If they want to use MS Outlook to work with their tasks, contacts, and appointments, in order

to enjoy the full benefits of all functions of the Open-Xchange Server, then the functionality of a standard version of MS Outlook is not sufficient. In and of itself, MS Outlook only supports MS Exchange as its groupware server. In order to use the groupware functions of the Open-Xchange Server from MS Outlook, the installation of the Outlook OXtender is necessary. This can then be used to synchronize the tasks, contacts, and schedules on their Open-Xchange user account with the personal folder file (PST) of their MS Outlook client. The integration of the Outlook OXtender is done in the form of a plug-in for MS Outlook which is embedded in the menu bar of MS Outlook. If the Outlook OXtender is installed and configured, the tasks, contacts, and schedule from your Outlook client will be synchronized with the data on your user account on the Open-Xchange Server.

The connection of the MS Outlook client via Outlook OXtender is implemented based on a WebDAV and XML interface and makes data available in real time. That means all important information is available on both the Open-Xchange Server and also under MS Outlook.

When MS Outlook starts up, the plug-in is automatically loaded, and Outlook's tasks, contacts, and schedule are immediately synchronized with the user's data stored on the Open-Xchange Server. Afterwards, synchronization happens automatically.

Chapter 10. Attachment B: Synchronized data fields

This attachment describes the Microsoft Outlook data fields that are synchronized with the Open-Xchange Server by the OXtender for Microsoft Outlook.

10.1. Synchronized contact fields

The table shows the following information:

- The two columns on the left side contain the data of the contact dialog window in Microsoft Outlook. This dialog window is displayed when creating a new contact or opening an existing one in Microsoft Outlook.
- The two columns on the right side contain the data of the contact dialog window of the Open-Xchange Server. This dialog window is displayed when creating a new contact or editing an existing one in the browser based interface of the Open-Xchange Server.

The table is sorted after the Microsoft Outlook contact fields.

Microsoft Outlook		Open-Xchange Server	
Tab	Data field	Tab	Data field
General	Full Name Title	Business	Title
	Full Name First	Business	First name
	Full Name Middle	Business	Middle name
	Full Name Last	Business	Last name
	Full Name Suffix	Business	Suffix
	Job title	Business	Position
	Company	Business	Company
	Phone numbers Business	Business	Phone (business)
	Phone numbers Home	Private	Phone (private)
	Phone numbers Business Fax	Business	Fax (business)
	Phone numbers Mobile	Business	Mobile
	Phone numbers Assistant	--	--
	Phone numbers Business 2	Business	Phone (business 2)
	Phone numbers Callback	--	--
	Phone numbers Car	Additional	Phone (car)
	Phone numbers Company	Business	Phone (company)
	Phone numbers Home 2	Private	Phone (private 2)
	Phone numbers Home Fax	Private	Fax (private)
	Phone numbers ISDN	--	--
	Phone numbers Mobile	--	--
	Phone numbers Other	Additional	Phone (other)
	Phone numbers Other Fax	Additional	Fax (other)
	Phone numbers Pager	Private	Pager
	Phone numbers Primary	--	--
	Phone numbers Telex	Additional	Telex
	Phone numbers TTY/TDD	Additional	TTY/TDD
	Adresses Business Street	Business	Street:

Microsoft Outlook		Open-Xchange Server	
Tab	Data field	Tab	Data field
	Adresses Business ZIP/Postal code	Business	Postcode
	Adresses Business City	Business	Town
	Adresses Business State/Province	Business	State
	Adresses Business Country/Region	Business	Country
	Adresses Home Street	Private	Street:
	Adresses Home ZIP/Postal code	Private	Postcode
	Adresses Home City	Private	Town
	Adresses Home State/Province	Private	State
	Adresses Home Country/Region	Private	Country
	Adresses Other Street	Additional	Street: (other)
	Adresses Other ZIP/Postal code	Additional	Postcode (other)
	Adresses Other City	Additional	Town (other)
	Adresses Other State/Province	Additional	County (other)
	Adresses Other Country/Region	Additional	Country (other)
	E-mail	Business	E-Mail (business)
	E-mail 2	Private	E-Mail (private)
	E-mail 3	Additional	E-Mail (other)
	Web page adress	Business	URL
	IM-adress	Business	IM (business)
	(Input field for comments)	Private	Comments
	(Attached files in input field)	Attachments	Attachments
	Categories	Business	Tags
	Private	Business	Type
Details	Department	Business	Department
	Office	Business	Room number
	Profession	Private	Profession
	Manager's name	Additional	Manager
	Assistant's name	Additional	Assistant
	Nickname	Private	Nickname
	Spouse's name	Additional	Spouse's name
	Birthday	Private	Date of birth
	Anniversary	Private	Anniversary

Table 10.1. Synchronized contact fields

10.2. Synchronized appointment fields

The table shows the following information:

- The two columns on the left side contain the data of the appointment dialog window in Microsoft Outlook. This dialog window is displayed when creating a new appointment or opening an existing one on in Microsoft Outlook.
- The two columns on the right side contain the data of the appointment dialog window of the Open-Xchange Server. This dialog window is displayed when creating a new appointment or editing an existing one in the browser based interface of the Open-Xchange Server.

The table is sorted after the Microsoft Outlook appointment fields.

Microsoft Outlook		Open-Xchange Server	
Tab	Data field	Tab	Data field
Appointment	To...	Participants	Participants/Resources
	Subject	Appointment	Description
	Location	Appointment	Location
	Label	--	Flag (in Calendar view)
	Start time	Appointment	Start date
	All day event	Appointment	All day
	End time	Appointment	End date
	Reminder	Appointment	Remind me
	Show time as Free	Appointment	Display as free
	Show time as Tentative	Appointment	Display as temporary
	Show time as Busy	Appointment	Display as reserved
	Show time as Out of office	Appointment	Display as absent on business
	(Input field for comments)	Appointment	Comments
	(Attached files in input field)	Attachments	Attachments
	Contacts	--	--
	Categories	Appointment	Tags
	Private	Appointment	Type

Table 10.2. Synchronized appointment fields

10.3. Synchronized task fields

- The two columns on the left side contain the data of the task dialog window in Microsoft Outlook. This dialog window is displayed when creating a new task or opening an existing one in Microsoft Outlook.
- The two columns on the right side contain the data of the task dialog window of the Open-Xchange Server. This dialog window is displayed when creating a new task or editing an existing one in the browser based interface of the Open-Xchange Server.

The table is sorted after the Microsoft Outlook task fields.

Microsoft Outlook		Open-Xchange Server	
Tab	Data field	Tab	Data field
Task	To...	Participants	Participants
	Subject	Task	Subject
	Due date	Task	Due date
	Start date	Task	Start date
	Status Not Started	Task	Status Not Started
	Status In Progress	Task	Status In progress
	Status Completed	Task	Status Done
	Status Waiting on someone else	Task	Status Waiting
	Status Deferred	Task	Status Deferred
	Priority	Task	Priority
	% Complete	Task	% done
	Reminder	Task	Remind me
	(Input field for comments)	Task	Comments
	(Attached files in input field)	Attachments	Attachments
	Contacts	--	--
	Categories	Task	Tags
	Private	Task	Type
Details	Date completed	--	--
	Total work	Details	Estimated duration
	Actual work	Details	Current duration
	Companies	Details	Companies
	Mileage	Details	Distance
	Billing information	Details	Billing information

Table 10.3. Synchronized task fields

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Further Information

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