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# **OPEN-XCHANGE SERVER**

## **Connector for Microsoft Outlook**

## **OPEN-XCHANGE SERVER: Connector for Microsoft Outlook**

Publication date Monday, 18. November 2013 Version 7.2.3

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# Table of Contents

<b>1 Connector for MS Outlook Using Outlook with the Connector for Microsoft Outlook 2 – A brief Guide .....</b>	<b>1</b>
1.1 Outlook as an E-Mail Client and a Collaborative Environment .....	1
1.2 Folder Structure .....	1
1.3 Calendar .....	2
1.3.1 Supported calendar functions .....	2
1.4 Contacts .....	2
1.5 Tasks .....	3
1.6 E-Mail .....	3
<b>2 The Connector 2 for MS Outlook .....</b>	<b>5</b>
2.1 Overview .....	5
2.2 Supported Functions .....	5
2.3 Functions not supported in the current version .....	6
2.3.1 Outlook plug-ins .....	6
<b>3 Installing the Connector for Microsoft Outlook .....</b>	<b>9</b>
3.1 Requirements .....	9
3.1.1 Server .....	9
3.1.2 Client PC .....	9
3.1.2.1 Operating system: .....	9
3.1.2.2 Back-end .....	9
3.1.2.3 MS Outlook: .....	9
3.1.3 Cookies .....	9
3.1.4 Login Data for the Open Xchange Server .....	9
3.1.5 Language Settings .....	10
3.2 System Settings (Firewall, Personal Firewall) .....	10
3.2.1 Outgoing Ports: .....	10
3.3 Installation Steps .....	10
3.3.1 Setting up profiles in Microsoft Outlook .....	13
3.3.1.1 How to set up a new profile in Outlook 2003: .....	13
3.3.1.2 How to set up a new E-Mail account: .....	13
3.3.1.3 How to set up a new profile in Outlook 2007/2010: .....	13
3.3.1.4 How to set up a new E-Mail account: .....	14
3.3.1.5 How to select a standard profile: .....	14
3.3.2 Log in to MS Outlook .....	14
<b>4 Additional Installation and Configuration .....</b>	<b>17</b>
4.1 Installing the Connector 2 for MS Outlook on Multi-User Systems .....	17
4.2 Different scenarios for getting started with the Connector 2 for Microsoft Outlook .....	17
4.2.1 Users with the previous Connector for Microsoft Outlook version .....	17
4.2.2 New customers with Outlook .....	17
4.2.3 New customers with Exchange .....	17
4.2.4 New customers with Hosted Exchange .....	18
4.2.5 Complete Exchange migration .....	18
4.3 Configuration of the Connector for Microsoft Outlook .....	18

4.3.1 Mail filter .....	18
4.3.1.1 Create new rule .....	19
4.3.1.2 Show rules .....	20
4.3.1.3 Edit rules .....	20
4.3.2 Vacation Notice .....	21
4.3.3 Changing personal data .....	21
4.3.4 Changing the password .....	21
4.3.5 Options .....	21
4.3.5.1 Settings .....	21
4.3.5.2 Advanced .....	22
4.3.5.3 Debug .....	22
4.3.5.4 Feedback .....	22
4.3.5.5 About .....	22
4.4 Uninstalling the Connector for Microsoft Outlook .....	22
4.5 Connector für Microsoft Outlook Updates .....	22
<b>5 Using Outlook and the Connector for Microsoft Outlook .....</b>	<b>23</b>
5.1 Data synchronization .....	23
5.2 E-Mail Accounts .....	23
5.2.1 E-Mail Deletion .....	23
5.3 Folder Concept .....	23
5.3.1 Personal Folders .....	24
5.3.2 Shared Folders .....	25
5.3.3 Public Folders .....	25
5.4 Creating Folders .....	25
5.4.1 Creating Private Folders .....	25
5.4.2 Creating Public Folders .....	26
5.5 Deleting Folders .....	26
5.6 Folder Permissions – Public Folders .....	26
5.6.1 Changing Folder Permissions .....	26
5.6.1.1 User Selection .....	27
5.6.1.2 Adding a User .....	27
5.6.1.3 Permission Levels .....	27
5.7 Contact Folders .....	28
5.8 E-Mails .....	29
5.8.1 E-Mail Format .....	29
5.8.1.1 Under Windows7 proceed as follows: .....	29
5.8.1.2 Under Windows XP proceed as follows: .....	30
5.9 Appointments .....	30
5.9.1 Creating Appointments .....	30
5.9.2 Defining Appointments .....	30
5.9.3 Scheduling .....	31
5.9.4 Creating recurring Appointments .....	31
5.9.5 Edit incoming meeting request .....	32
5.10 Tasks .....	32
5.10.1 Delegating tasks .....	32
<b>6 Attachment B: Synchronized data fields .....</b>	<b>35</b>
6.1 Synchronized contact fields .....	35
6.2 Synchronized appointment fields .....	38

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6.3 Synchronized task fields .....	39
Index .....	41
Software License Agreement .....	43



## Chapter 1. Connector for MS Outlook Using Outlook with the Connector for Microsoft Outlook 2 – 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 the Open-Xchange Server solution.

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 Mozilla, Firefox, IE, Safari or Chrome 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.

### 1.1. Outlook as an E-Mail Client and a Collaborative Environment

The Connector for MS 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 OXtender2 for MS Outlook handles the synchronization of folders, contacts, calendars, E-Mails, and tasks.

### 1.2. Folder Structure

With the installation of the Connector for MS Outlook, all private folders, in addition to two special Open-Xchange folders, are displayed in alphabetical order under **OXtender2** in Outlook. The folder order is configurable in Microsoft Outlook. To see these folders, select the “Folder List” view in the lower left-hand corner of the Outlook window. The OXtender 2 for Microsoft Outlook synchronizes all folders of the following types with the Open-Xchange Server:

- Calendar
- Contacts
- E-Mails
- and Tasks.

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 two special Open-Xchange folders are also synchronized with the server:

Public Folder	The Public Folder is a place where all users can store and share data.
Shared Folder	The Shared Folder contains the private folders of other users to whom specific access permissions have been granted.



*Figure 1.1. The Outlook folder list with Open-Xchange folders.*

## 1.3. 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 personal calendar, in public calendar folders or in shared calendar folders.

### 1.3.1. Supported calendar functions

The Open-Xchange Server supports the following functions:

- Outlook's Free/Busy functionality    A feature that allows a user to query the availability of others based on their calendar information.
- Reservation of company resources    Such as rooms or equipment.
- Creating a series of events.
- Inviting other users to events
- Accepting or declining an appointment invitation.

## 1.4. 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 under **Public folders**. It is visible to all Open-Xchange users.



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## 1.5. Tasks

Tasks can be created and edited in Outlook as usual for individual users and user groups. Additionally, you can create task series, as well as tasks in public or shared folders. Tasks can be delegated to other users who can accept or decline the task.

## 1.6. E-Mail

In order to synchronize E-Mails from the Open-Xchange Server to Outlook, the push bundle needs to be installed on the server. The folder structure will be the same as in Outlook. Additionally, there's a customizable search folder where E-Mails with specified criteria can be collected.



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There are also a few limitations when synchronizing E-Mails. The main limitation is that neither categories nor signatures are synchronized with the first version.

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## Chapter 2. The Connector 2 for MS Outlook

### 2.1. Overview

With the Connector for Microsoft Outlook 2 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 Connector for Microsoft Outlook 2, Outlook users continue to use their Outlook functions in combination with the Open-Xchange Server. The conversion to unusual working environments and differently structured screen layout can be avoided completely. With the OXtender 2 for Microsoft Outlook, the functionality of the Open-Xchange typical functions can be used while continuing to work with the Outlook client.

### 2.2. 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
  - 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
- Offline and online mode (automatic detection)
- Security through HTTPS

- Support of an update server for decentralized software maintenance
- Push technology for automated data synchronization to reduce system load

## 2.3. Functions not supported in the current version

- Linked contacts \*
- HTTPS based on untrusted certificates
- Outlook 97 support
- Windows 95, 98, NT support
- Server-side administration of notes and journal folders
- rtf formattings in Outlook are deleted as soon as the respective object is changed and saved on the Open-Xchange Server. \*
- Formattings of E-Mail drafts and task notes created in the OXtenderConnector 1 for MS Outlook will not remain.
- Enhanced data fields are not synchronized. \*
- The input field length is limited. \*
- Saving a tasks series each work day \*
- Saving a tasks series based on the **done** date \*
- Move to trash events \*
- Saving a private task with participants \*
- Saving a private appointment with participants \*
- Saving a serial appointment each work day \*
- Saving appointments, tasks, contacts in the Drafts folder \*
- Synchronize attachments to an Apple iCal appointment. \*

\* These features will probably be supported in a future version, respectively the limitations will be fixed.

E-Mail draft formattings created in the Connector 1 for MS Outlook can be recovered in the Connector 2 for MS Outlook as follows:

1. Add the Connector 1 PST file as additional PST file to the Connector 2
2. Delete the drafts in the Connector 2
3. Copy the Connector 1 drafts from the PST to the Connector 2
4. remove the Connector 1 PST file

### 2.3.1. Outlook plug-ins

During the installation, single plug-ins might be deactivated. Those plug-ins are:

OutlookChangeNotifier.Connect

In order to use this plug-in, manually add it after the installation process.



## Chapter 3. Installing the Connector for Microsoft Outlook

### 3.1. Requirements

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

#### 3.1.1. Server

Open-Xchange Server 6, version 6.18 or higher

#### 3.1.2. Client PC

##### 3.1.2.1. Operating system:

Windows Vista  
Windows XP  
Windows 7  
Windows 8  
Windows Terminal Server 2003

##### 3.1.2.2. Back-end

The Back-end system need to be able create subfolders. OLOX cannot be operated on systems without that capability.

##### 3.1.2.3. MS Outlook:

Latest version of MS Outlook 2007  
Latest version of MS Outlook 2003  
Latest version of MS Outlook 2010  
Latest version of MS Outlook 2013



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The following is currently not supported:

The Office 2010 Home and Business test version  
MS Outlook running in a virtual environment (e.g. VMware or Parallels Desktop)  
Using both MS Outlook 2007 and MS Outlook 2013.  
Using both MS Outlook 2010 and MS Outlook 2013.

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For automatically processing E-Mail rules, you need to have at least Outlook 2007 installed.

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#### 3.1.3. Cookies

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

#### 3.1.4. 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 address
- Your Open-Xchange Server username
- Your password

### 3.1.5. Language Settings

For a smooth use of the Connector 2 in your language, a Windows system and Outlook in the respective language is required. Connector 2 for Microsoft Outlook messages are displayed in the Outlook language set by the user.

## 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 Connector 2 for Microsoft Outlook:

### 3.2.1. Outgoing Ports:

http	80/tcp	World Wide Web HTTP
https	443/tcp	Secure http protocol, via TLS/SSL 80

## 3.3. Installation Steps

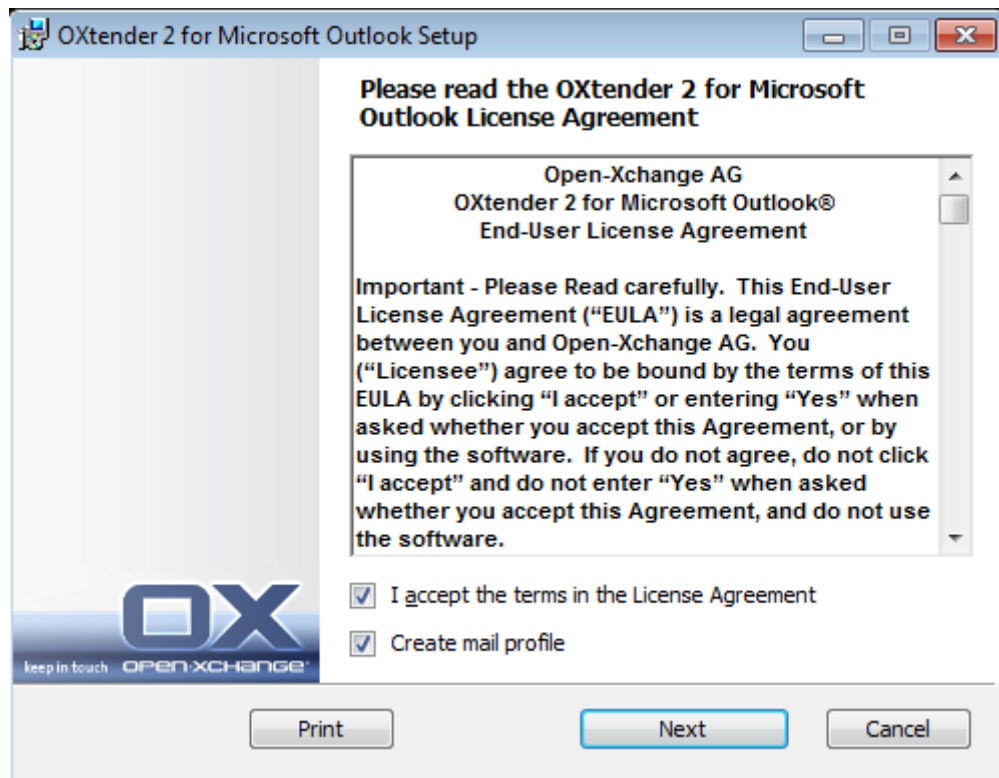
Install the Connector for Microsoft Outlook on your client PC by executing the .exe setup file.

OXtender 2 for Microsoft Outlook \_v7.0\_en-us.exe

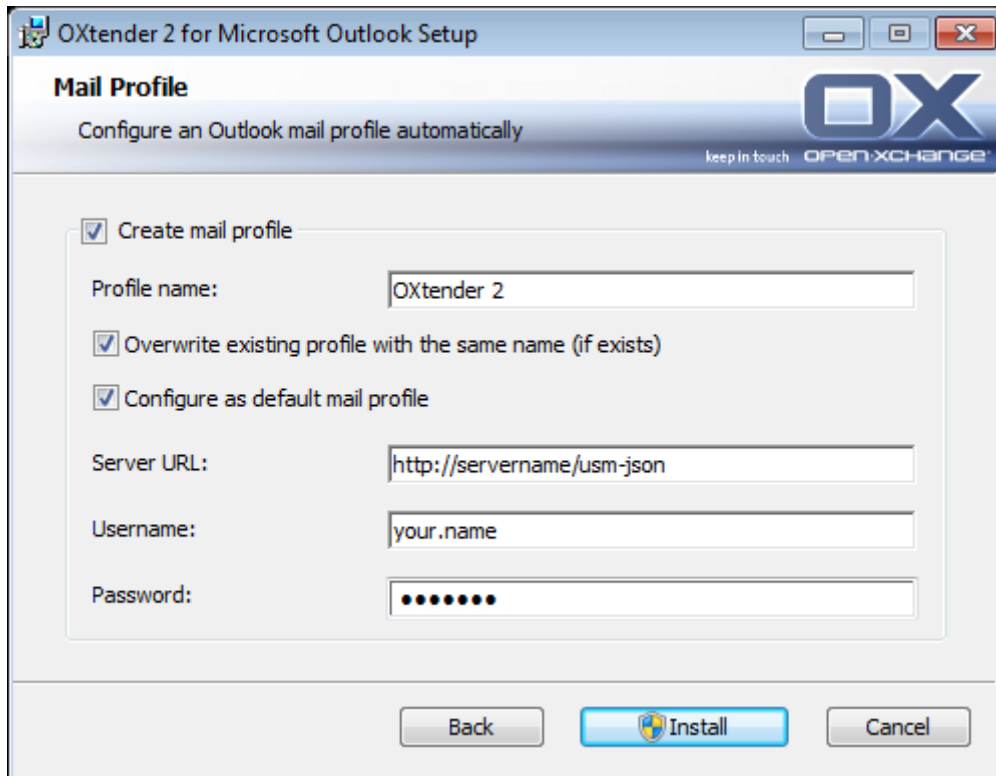
where the version number stands for the current version of the Connector for Microsoft Outlook.

1. Starting the installation
  - To start the installation, double-click on the .exe setup file.
2. Accepting the license agreement
  - a. Read the license agreement.





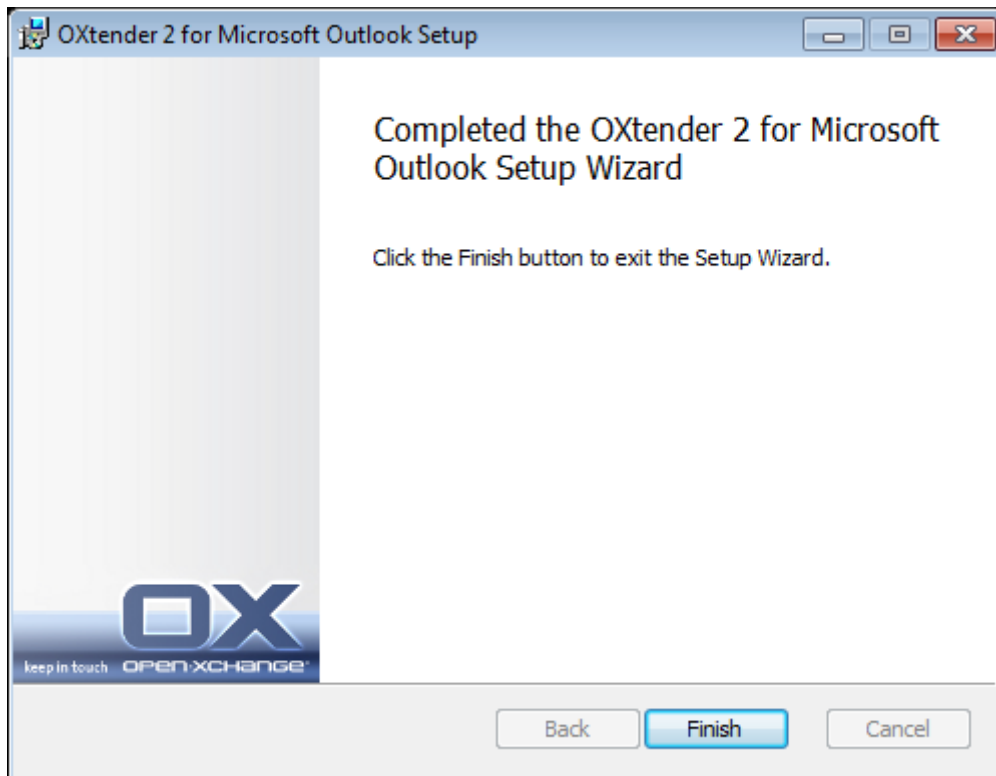
- b. Click on the entry **I accept the license agreement**.
  - c. To automatically set up a mail profile, activate the entry **Create mail profile**.
  - d. Click on **Next**.
3. Configuring the mail profile
    - a. You can change the profile name and you need to enter the server name, followed by /usm-  
json, and your login data.



b. Click on **Install**.

4. Completing the Installation

a.



- b. To complete the installation, click on **Finish**. The Connector 2 for Microsoft Outlook is installed.

### 3.3.1. Setting up profiles in Microsoft Outlook

Microsoft Outlook allows to set up several profiles. This is useful for different scenarios. For example if a Microsoft Exchange profile exists and the Connector 2 for Microsoft Outlook should be installed.

As it is necessary to enter a server when setting up a profile it is not possible to use two different Exchange programs in a single profile.

#### 3.3.1.1. How to set up a new profile in Outlook 2003:

1. In the **Start** menu click on **Control Panel**.
2. The Windows system control opens.
3. Click on **Mail**.
4. There you can create a new E-Mail account or a new profile.
5. In the **Mail Setup - OXtender2** dialog window click on **Show Profiles...**
6. Now you can edit, remove or copy profile and view the properties
7. Click on **Add**.
8. Enter a name for the new profile.
9. A wizard guides you through the E-Mail accounts dialog.

#### 3.3.1.2. How to set up a new E-Mail account:

1. Select **Adding a new E-Mail account**.
2. Click on **Next**.
3. Select Additional server types
4. Select OXTENDER2
5. Enter the server url with the exact servlet path, by default /usm-json, the username and the password

#### 3.3.1.3. How to set up a new profile in Outlook 2007/2010:

1. In the **Start** menu click on **Control Panel**.
2. The Windows system control opens.
3. Click on **Mail**.
4. There you can create a new E-Mail account or a new profile.
5. In the **Mail Setup - OXtender2** dialog window click on **Show Profiles...**
6. Now you can edit, remove or copy profile and view the properties
7. Click on **Add**.

8. Enter a name for the new profile.
9. A wizard guides you through the E-Mail accounts dialog.

#### 3.3.1.4. How to set up a new E-Mail account:

1. Select Additional server type
2. Click **Next**
3. Select OXtender2 under **Others**
4. Click **Next**
5. Enter the server url with the exact servlet path, by default /usm-json, the username and the password

#### 3.3.1.5. How to select a standard profile:

1. When having set up the E-Mail account for the newly set up profile you can enter several standard settings.
2. Select a standard profile.
3. Activate the checkbox **Always use this profile**.
4. Click on **OK**.

### 3.3.2. Log in to MS Outlook



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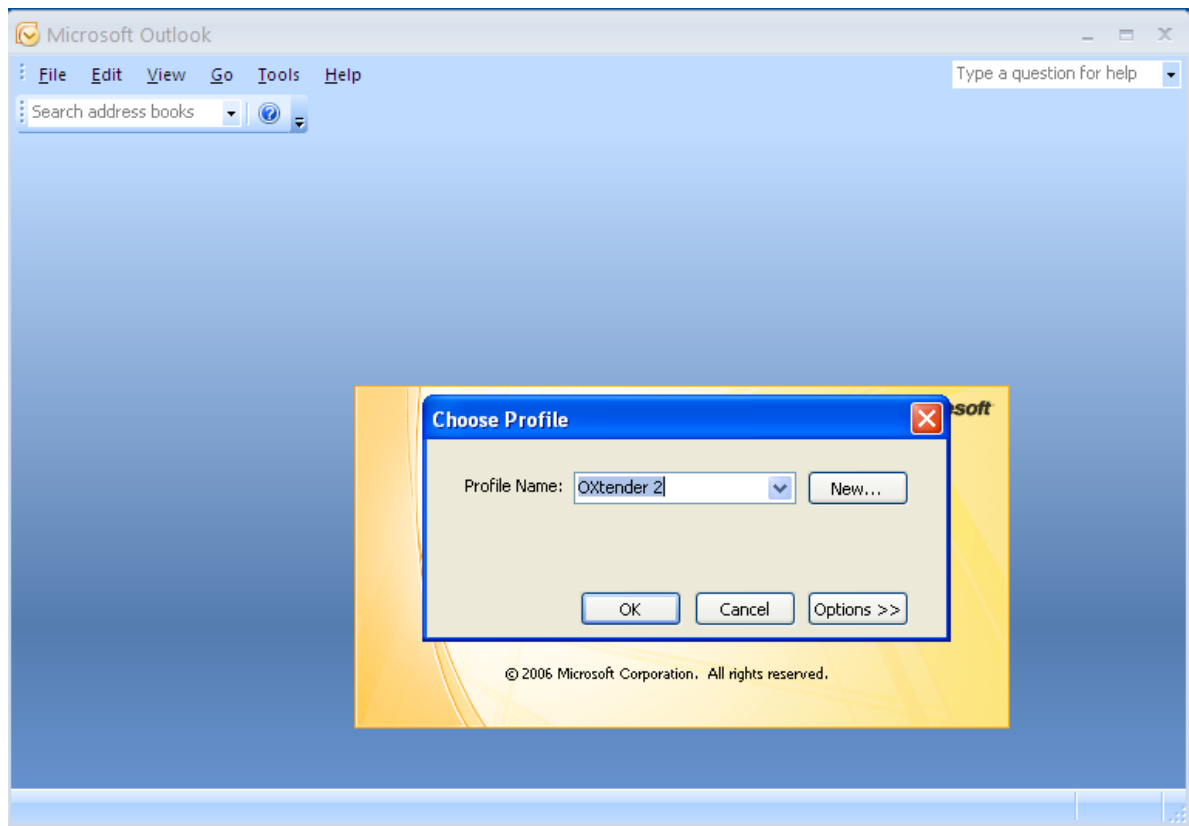
When having set up a profile and initially starting the Connector for MS Outlook, you need to be connected to the internet.

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Start Microsoft Outlook. From a drop-down list select the wanted profile.



Do not use the `-embedding` switch when starting Outlook. It would prevent the Connector for MS Outlook from starting properly.



When synchronizing you can select whether the server or client wins. It is recommended to give priority to the server as otherwise data can be lost.



## Chapter 4. Additional Installation and Configuration

### 4.1. Installing the Connector 2 for MS Outlook on Multi-User Systems

In general, client systems are only used by a single user. In this case, Connector 2 for MS Outlook simply has to be installed by the user in Windows.

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. Different scenarios for getting started with the Connector 2 for Microsoft Outlook

There are different procedures for setting up the Connector 2 for Microsoft Outlook:

- For existing customers
- For new customers with Outlook
- For new customers with Exchange
- For new customers with Hosted Exchange (not possible yet)
- Complete Exchange migration

#### 4.2.1. Users with the previous Connector for Microsoft Outlook version

Procedure for users with the previous Connector for Microsoft Outlook version, with their data on the Open-Xchange Server:

1. Set up new profile
2. Start Microsoft Outlook

The data of the previous Connector for Microsoft Outlook version stay in the profile: smtp, imap, and user data.

#### 4.2.2. New customers with Outlook

Procedure for new customers with no data in the Open-Xchange Server and with their data in the Outlook PST file:

1. Use the PST Importer to get the data into the Open-Xchange Server
2. Set up a profile
3. Start Microsoft Outlook

Tip: Users with the previous Connector for Microsoft Outlook version can use this scenario for old PST files.

#### 4.2.3. New customers with Exchange

Procedure for new customers with Exchange:

1. Use the PST Importer to get the data into the Open-Xchange Server
2. Set up a profile
3. Start Microsoft Outlook

#### 4.2.4. New customers with Hosted Exchange

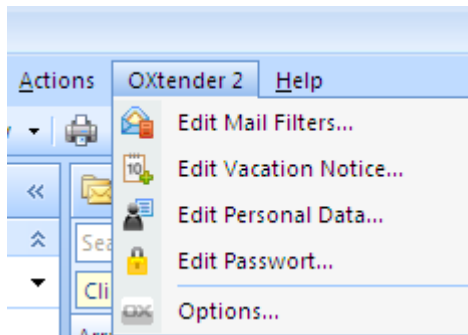
This is not yet possible but will be implemented later.

#### 4.2.5. Complete Exchange migration

This has to be done by administrators and is not explained in this user documentation.

### 4.3. Configuration of the Connector for Microsoft Outlook

With the installation, the Connector for Microsoft Outlook was installed as an **add-in** for Outlook. If the installation was successful, you will find an extension to the Outlook menu with the **OXtender2** entry.



The OXtender for MS Outlook synchronizes any personal data, filter rules, and vacation message with the Open-Xchange Server.

To configure Connector 2 for Microsoft Outlook, select in Microsoft Outlook the menu entry **OXtender** or click the icon next to the status field. Depending on the theming the icon design can vary.

Via the **OXtender2** menu entry in the panel you can:

- Open and edit plug-ins
- Apply general settings
- Contact Open-Xchange

The single menu entries are described in the following sections.

#### 4.3.1. Mail filter



For automatically processing E-Mail rules, you need to have at least Outlook 2007 installed.

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 menu entry **OXTender** select the entry **Edit Mail Filters**.

Result: The dialog window displays the available rules.

#### 4.3.1.1. Create new rule

How to create a new rule:

1. In the **Edit Mail Filters** window click on **New...**
2. In the **Mail Filter Rule** 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 **+**. Details can be found later in this chapter. To add a further action again click on **+**. To remove an action click on the **-** 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.

#### 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 **For an incoming message that matches any** 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.

### 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.

### 4.3.1.2. 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.

### 4.3.1.3. Edit rules

How to change the order of the rules:

1. In the field where the rules are listed 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 **OK** button.

How to delete a rule:

1. In the **Edit Mail Filters** window select a rule.
2. Click the **Delete** button.

### 4.3.2. 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 menu entry **OXtender2** select the entry **Edit Vacation Notice**.
- **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.

### 4.3.3. Changing personal data

**How to change your personal data:**

1. From the menu entry **OXtender2** select the entry **Edit Personal Data**.
2. In the **Personal Data** window select one of the entries **Business**, **Private** or **Additional**.
3. Edit your personal data in the entry fields.
4. To save the changes click the **OK** button.

**Result:** Your personal data are changed.

### 4.3.4. Changing the password

**How to change your password:**

1. From the menu entry **OXtender2** select the entry **Password Change**.
2. Enter your previous password in the entry field **Your old password**.
3. Enter a new password in the entry field **The new password**.
4. Again, enter the new password in the entry field **Confirm new password**.
5. The **Password strength** indicates how safe the new password is. If the strength is low you might want to enter another password.
6. To save the changes click on **OK**.

**Result:** The password is changed.

### 4.3.5. Options

#### 4.3.5.1. Settings

Via the **Settings** tab you can configure the following:

Select the language of Connector 2 for MS Outlook plug-in

Display the command bar

Display the synchronization status in the system tray

Display the synchronization status in the Outlook status bar

Set the protocol level

View the path to the protocol file

Enable polling of E-Mail subfolders

As a server side push of E-Mail folders might not be enabled, this option enables you to frequently synchronize your E-Mail folders.

Set the polling interval for E-Mail subfolders

Please note: When selecting another language, Outlook needs to be re-started for the change to take effect.

#### 4.3.5.2. Advanced

Via the **Advanced** tab you can set debug options and define the number of E-Mails to be synchronized per each synchronization request.

#### 4.3.5.3. Debug

Via the **Debug** tab you can locally save system information and log files.

#### 4.3.5.4. Feedback

Via the **Feedback** tab you can directly contact the OXTender team. When clicking on the **Send feedback** button, an E-Mail window opens. You can attach system information and log files to the E-Mail.

#### 4.3.5.5. About

Via the **About** tab you can view the version numbers of the components.

## 4.4. Uninstalling the Connector for Microsoft Outlook

To uninstall the Connector for Microsoft Outlook you first have to close Outlook. Then you can remove the OXTender 2 for Microsoft Outlook by clicking the **Start** menu and either selecting the **System control** or **Computer** menu entry - depending on the Windows version.

## 4.5. Connector für Microsoft Outlook Updates

Available updates are automatically displayed on top of the OXTender 2 for Microsoft Outlook menu icon. To install the updates select the menu item **About**. Below **Update Information** the update is displayed as button. The update can be installed by clicking the button.

## Chapter 5. Using Outlook and the Connector for Microsoft Outlook

### 5.1. Data synchronization

If there are errors during the synchronization the synchronization process stops and you get an error message with a detailed description. The synchronization process proceeds as soon as you fixed the error. Typical errors are:

Data fields are too long  
Appointment conflict



When synchronizing you can give priority either to the server or the client. It is strongly recommended to give priority to the server as otherwise data might get lost.



When synchronizing there are 50 objects retrieved per each folder. When each folder has been processed, the synchronization proceeds with the first folder again.



Offline/Online Synchronization: Any changes that are made using Microsoft Outlook offline will be automatically synchronized the next time you go online.

When running Outlook a folder's data is synchronized when having it activated.

### 5.2. E-Mail Accounts

When used with a Microsoft Exchange Server, Outlook stores incoming E-Mail in the **Inbox** folder found under **Personal Folders**.

In order to synchronize multiple inboxes it is recommended to use the unified inbox of the Open-Xchange Server and to use the server for the synchronization. Information about the unified inbox can be found in the User Guide or the online help of the Open-Xchange Server.

#### 5.2.1. 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. To circumvent this step, activate the setting **Permanently remove deleted E-Mails?** in the E-Mail options of the Open-Xchange Server.

### 5.3. Folder Concept

The Open-Xchange Server defines several types of folder:

Personal folders  
Public folders  
Shared folders

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

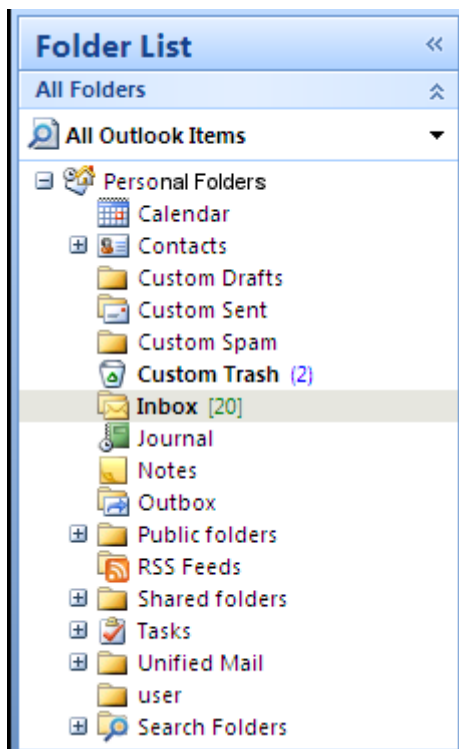
Personal folders refer simply to any other folder you place in the folder list, including Contacts, Calendar, and Tasks, that are set up for each user by the Open-Xchange Server.

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.

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 **Outlook Address Book** 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 5.1. Number of all elements next to folder name*

### 5.3.1. Personal Folders

Personal folders are essentially folders which hold only one user's data and are accessible only for that user. By default, each user has three personal folders after installing Open-Xchange Server:

Contacts  
Calendar  
Tasks

Each of which are named after their corresponding folder type. Users have the option of creating more personal folders of those types.

A user's personal 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 personal folders are displayed to users to whom proper access has been granted under the heading **Shared Folders** in Outlook.

### 5.3.2. 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**.



---

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

---

### 5.3.3. Public Folders

**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.

---

## 5.4. Creating Folders

### 5.4.1. Creating Private Folders

To create a new personal folder or subfolder, right-click anywhere in the folder list (except under Public Folders or Shared Folders) found under **Personal folders**.

1. From the context menu that appears, select the entry **New Folder...** A dialog appears in which you can configure the new folder.
2. In the **Name** field, enter the name of the private folder to be created.
3. Using the dropdown box labeled **Folder contains:** select the type of data to be stored in the new private folder.
4. 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.

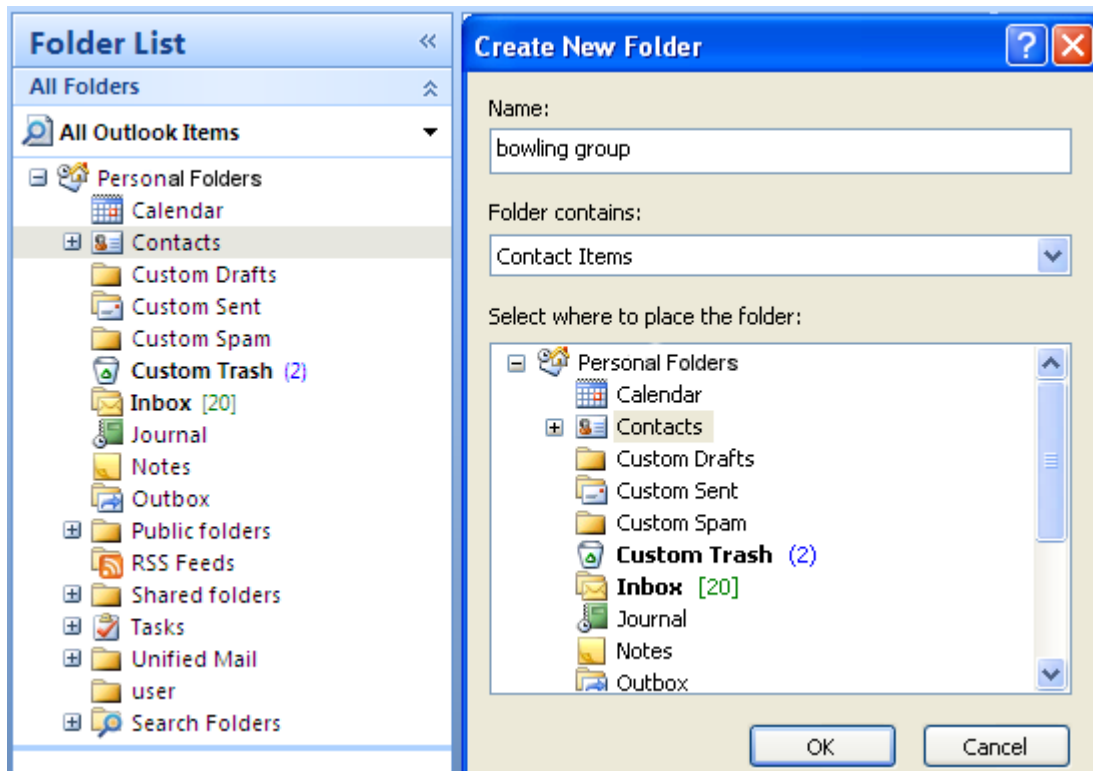


Figure 5.2. Creating a personal folder

### 5.4.2. 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 **Public Folders**. To create a public folder, right-click the **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.

### 5.5. 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.

### 5.6. 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.

#### 5.6.1. Changing Folder 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 **OX Folder Permissions** tab to define the access permissions.



### 5.6.1.1. 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 **Level** or by checking the control checkboxes under **Detailed access permissions** directly to define custom permission level. Corresponding to the permission level you can choose between 9 levels and a custom setting.

### 5.6.1.2. Adding a User

To add a new user to the list of permissions holders for a given folder:

1. Click on the icon for adding a user or a group.
2. In the dialog that appears, you will see two rows. The upper row displays a list of all users and user groups defined on the Open-Xchange Server. In the lower row are all the users for whom access permissions have been defined for the folder.
3. 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.
4. To remove users from the list, mark the users in the lower row and click on the **Remove** button.
5. When you have finished, confirm the changes by clicking on the **OK** button.
6. 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.

### 5.6.1.3. Permission Levels

There are 9 permission levels:

Permission Level "None"  
 Permission Level 1 (Contributor)  
 Permission Level 2 (Reviewer)  
 Permission Level 3 (Nonediting Author)  
 Permission Level 4 (Author)  
 Permission Level 5 (Publishing Author)  
 Permission Level 6 (Editor)  
 Permission Level 7 (Publishing Editor)  
 Permission Level 8 (Owner)

Level	Own/new objects	Existing objects	Folder
Level "None"	/	/	/
Level 1	create	/	see
Level 2	/	read	
Level 3	create	read	/
Level 4	create, edit, delete	read	/
Level 5	create, edit, delete	read	create subfolders
Level 6	create, edit, delete	read, edit, delete	/
Level 7	create, edit, delete	read, edit, delete	create subfolders

Level	Own/new objects	Existing objects	Folder
Level 8	create, edit, delete, set access permissions	read, edit, delete, set access permissions	create subfolders, set access permissions

*Table 5.1.*

## 5.7. Contact Folders

In order to enable access to your various contacts folders from the calendar and other interfaces in Outlook, do the following:

1. Right-click on the folder in the Outlook folder list.
  2. Select **Properties** from the resultant context menu.
  3. 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.



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.

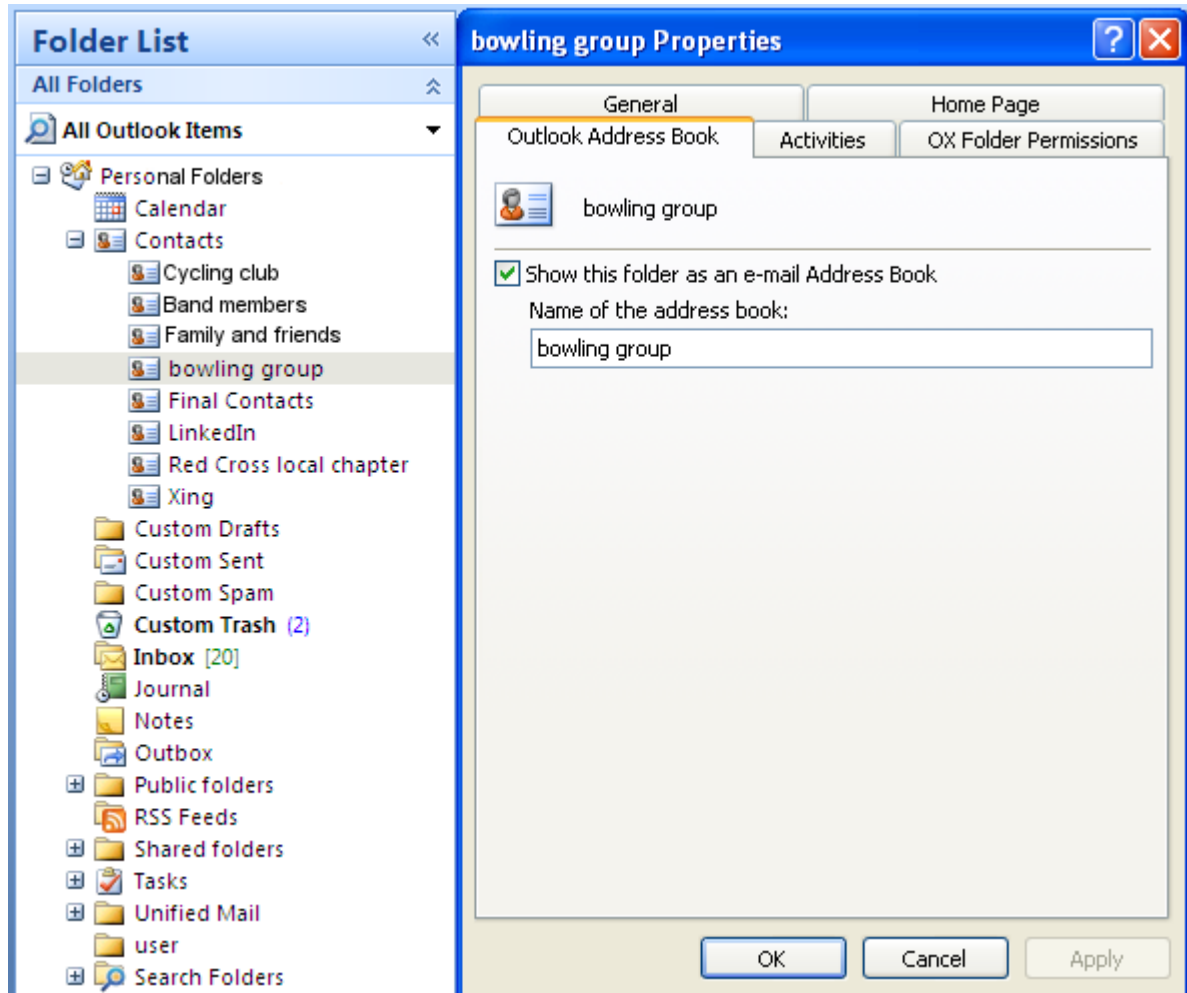


Figure 5.3. Using a Contact Folder as an E-mail Address Book

## 5.8. E-Mails

### 5.8.1. E-Mail Format

To correctly display special characters, UTF-8 has to be set up as E-Mail format.

#### 5.8.1.1. Under Windows7 proceed as follows:

1. In the **Extras** menu click on **Options**
2. Open the **E-Mail format** tab.
3. Click the **International options** button

4. From the drop-down field below **Preferred encoding for outgoing messages**: choose **Unicode (UTF-8)**.

### 5.8.1.2. Under Windows XP proceed as follows:

1. In the **Tools** menu click on **Options**
2. Open the **Mail Format** tab.
3. Click the **International Options** button
4. From the drop-down field below **Preferred encoding for outgoing messages**: choose **Unicode (UTF-8)**.

## 5.9. Appointments

### 5.9.1. Creating Appointments

To create a new appointment, do the following:

1. First click with the left mouse button in the Outlook folder list on the desired calendar folder.
2. In the calendar view, switch to the day on which the appointment should be created.
3. Click and drag the mouse to select the block during which the appointment will occur.
4. Next right-click on the time range, now highlighted in blue.
5. Select the **New Appointment** item.

It doesn't matter whether you are working in a personal, public, or shared folder, as long as you have sufficient access permissions.

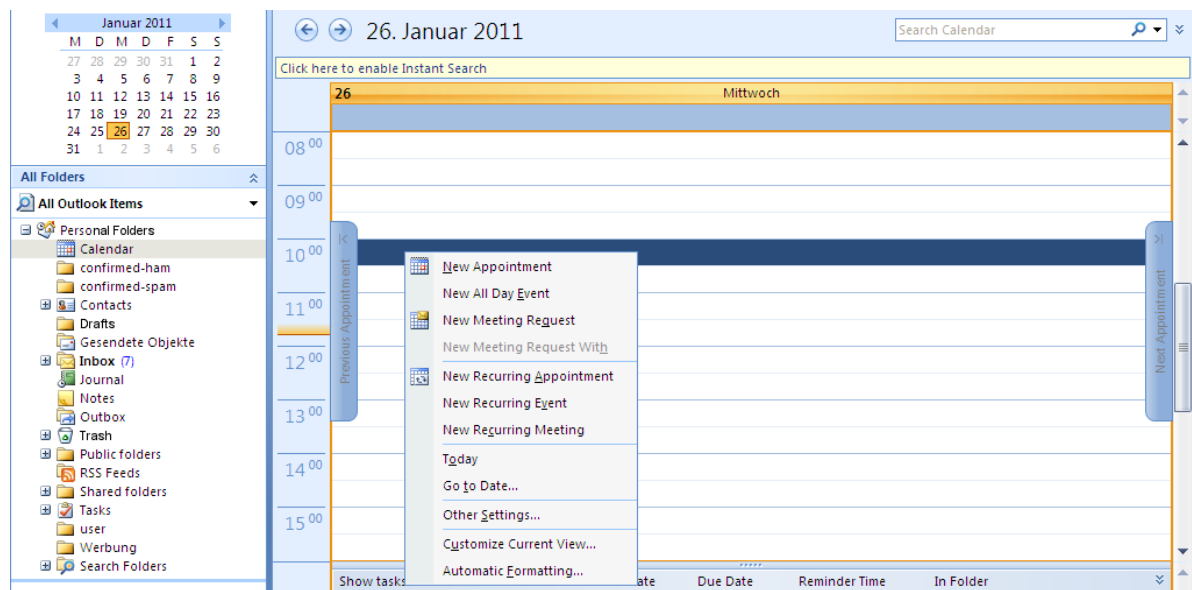
### 5.9.2. Defining Appointments

In the resulting dialog box, enter all the basic data for the new appointment.

<b>Subject</b> text field	Here you can give the appointment an appropriate title.
<b>Location</b> field	Here you can enter where the appointment should take place.
<b>Start time, End time</b>	Here you can change the scheduling details.
<b>All day event checkbox</b>	Here you can set the appointment as all-day appointment.
<b>Reminder</b> dropdown	Here you can make sure that Outlook will remind you of the appointment.
<b>Show as</b> dropdown.	Here you can set whether the appointment is marked as <b>Busy, Free, Tentative</b> or <b>Out of Office</b> .
<b>Categorize</b> dropdown	Here you can assign an additional colored label with an assigned category.
Large text field	Here you can enter additional information and notes for the appointment.
<b>Categories</b> button	Here you can assign the appointment to a predefined category.

**Private icon**

To hide an appointment to other users activate the **Private** icon.



**Figure 5.4. Creating a new Appointment in MS Outlook**

### 5.9.3. 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, do the following:

1. Click on the **Add others** button.
2. In the dialog which appears, you can select the desired participants from the address books to which you have access
3. Mark the desired participant or a group and click on the **Required** button.
4. In order to hide an appointment to other users than the invited ones, activate the **Private** icon.
5. Once you have added all participants, confirm the selection by clicking the **OK** button.

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

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

### 5.9.4. Creating recurring Appointments

To create a new recurring appointment, do the following:

1. Right-click on the calendar view.

2. From the context menu, select the "New recurring appointment" item.
3. 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.
4. You also have the option of selecting an interval at which this appointment should take place. You can create daily, weekly, monthly, or even yearly appointments, and you can select fixed times or weekdays for them.
5. Once you have determined and confirmed the desired settings, the remainder of the process is identical to that involved in creating a regular appointment.



Moving serial appointments to other folders is not possible.

A serial appointment cannot be moved to another folder as this function is not supported by the Open-Xchange Server.

### 5.9.5. Edit incoming meeting request

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

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 **Tentative**. 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 **Decline**.

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

To make another proposal for the appointment's time, click on **Propose New Time**

To view the appointment in the calendar, click on **Calendar...**

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.



If receiving an invitation from an external application, the .ics attachment has to be double-clicked in order to edit the incoming meeting request.

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

## 5.10. Tasks

### 5.10.1. Delegating tasks

You can delegate a task to another user. To do so, proceed as follows:

1. Open the tasks overview and right-click the icon on the left of the respective task.
2. In the context menu select **Assign task**.
3. The **Delegate task** window opens.
4. In the **To..** field enter the E-Mail address of the user to delegate the task to.

5. Then click on **Send...**
6. The user will receive an E-Mail notification. Similar to appointment notifications the user can accept or decline the task or set the status to Tentative. The status can also be changed later in the tasks overview or in the detail view of the task.





## Chapter 6. Attachment B: Synchronized data fields

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

### 6.1. 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   Call-back	--	--
	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	--	--

Microsoft Outlook		Open-Xchange Server	
Tab	Data field	Tab	Data field
	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:
	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)

Microsoft Outlook		Open-Xchange Server	
Tab	Data field	Tab	Data field
	(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 6.1. Synchronized contact fields**

## 6.2. 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 6.2. Synchronized appointment fields**

### 6.3. 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 6.3. Synchronized task fields**



## Index

### A

- Appointments, 30
  - create, 30
  - recurring, 31
- define, 30
- schedule, 31

### C

- Calendar, 2
  - supported functions, 2
- Changing password, 21
- Changing personal data, 21
- Client interface, 1
- collaborative environment, 1
- Configuration
  - Connector for Microsoft Outlook, 18
    - installation, 17
- Connector for MS Outlook
  - benefits, 1
  - client interface, 1
  - Introduction, 1
- Connector2 for MS Outlook
  - menu entry
  - settings, 21
- Contact folders, 28
- Contacts, 2

### D

- Data synchronization, 23
  - errors, 23
- Delegate
  - tasks, 32

### E

- E-Mail
  - deletion, 23
- E-Mail accounts, 23
  - synchronize
  - multiple inboxes, 23
- E-Mail client, 1
- E-Mail filters, 18
  - edit rules, 20
  - new condition, 19
  - new rule, 19
  - set action, 20
  - show rules, 20
- E-Mails, 3, 29
  - format, 29

### F

- Folder concept, 23
- Folder structure, 1
  - journal and note folders, 1

- public folders, 1
- shared folders, 1

### Folders

- contacts, 28
- create, 25
  - private folders, 25
  - public folders, 26
- delete, 26
- permissions
  - add user, 27
  - levels, 27
  - public folders, 26
- personal, 23
- public, 23
- shared, 23

### Functions

- not supported, 6
- supported, 5

### I

- Installation, 9
  - installation steps, 10
  - multi-user systems, 17
  - requirements, 9
    - client PC, 9
    - cookies, 9
    - language settings, 10
    - login data, 9
    - server, 9
  - system settings, 10
    - outgoing ports, 10

### M

- Meeting request
  - incoming
  - edit, 32
- MS Outlook
  - log in, 14

### O

- Overview, 5
- OXtender 2
  - updates, 22
- OXtender for MS Outlook
  - plug-ins
    - E-Mail filters, 18

### P

- Personal folders, 24
- Plug-ins, 6
  - change password, 21
  - E-Mail filters, 18
  - personal data, 21
  - vacation notice, 21
- Profiles, 13
- Public folders, 25

## S

### Settings

#### E-Mail

- filters, 18
- vacation notice, 21

### Setup

- complete Exchange migration, 17
- E-Mail accounts, 13
- for existing customers, 17
- for new customers with Exchange, 17
- for new customers with Outlook, 17
- Profiles, 13

### Shared folders, 25

### Supported functions, 5

### Synchronization, 23

- contacts, 2
- E-Mails, 3
- tasks, 3

## T

### Tasks, 3, 32

- delegate, 32

## U

### User data

- changing password, 21
- changing personal data, 21

## V

### Vacation notice, 21



# Software License Agreement

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January 2011

