



University Information  
Technology Services

# Using Microsoft Outlook 2010 with Zimbra

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**Published by Kennesaw State University – UITs 2010**

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# University Information Technology Services

## Using Microsoft Outlook 2010 with Zimbra

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# Introduction

Using Microsoft Outlook 2010 as a “desktop client” for Zimbra gives the end-user added functionality not available in Zimbra, due to the fact that the latter is a web-based application. This document covers the basic use of the Mail, Calendar and Sharing features of Outlook, as well as the following features of Outlook that are available to Zimbra users on campus:

- Pop-up notification of new email
- Delaying delivery of an email message
- Saving one or more messages as a text or html file
- Archiving

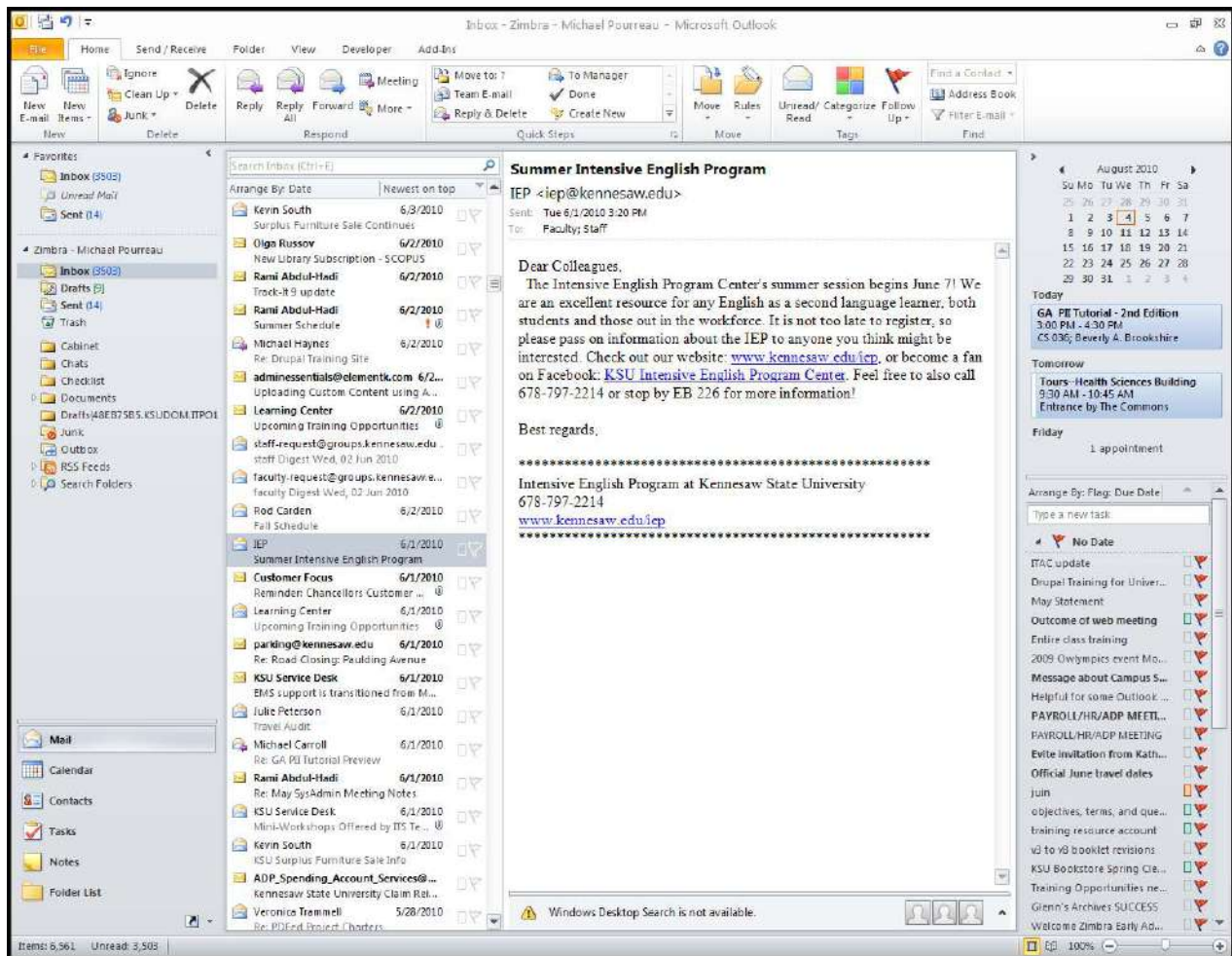


Figure 1 - Microsoft Outlook 2010

# Mail

## Important note about address books in Outlook:

Addressing email messages in Outlook works a little differently than it does in Zimbra. First of all, in order to have access to the Global Address List, you will need to click the **To...** or **Cc...** button, rather than simply entering the name into the **To** or **Cc** field. (Typing a name into the **To** or **Cc** field only reveals names in the “Contacts” address book). Clicking the button opens the “Select Names: Contacts” window, in which you have access to the Global Address List. Further, you will need to set the Global Address List to be the first address list shown in the “Select Names - Contacts” window, as shown in steps 1 – 6 below:

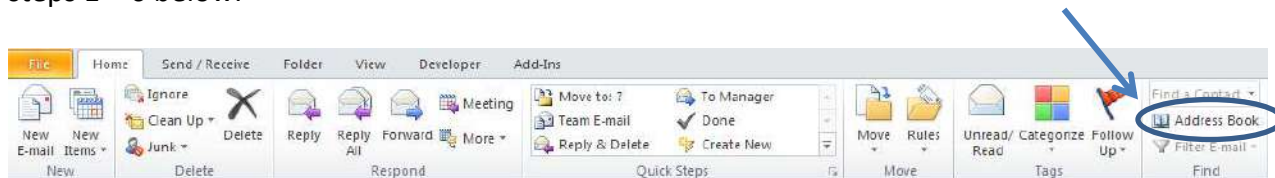


Figure 2 - Address Book

1. From the **Home** tab, go to the right end side of the ribbon and click on **Address Book**.

The “Address Book: Contacts” window appears.

2. On the menu bar, click on **Tools**→**Options**.

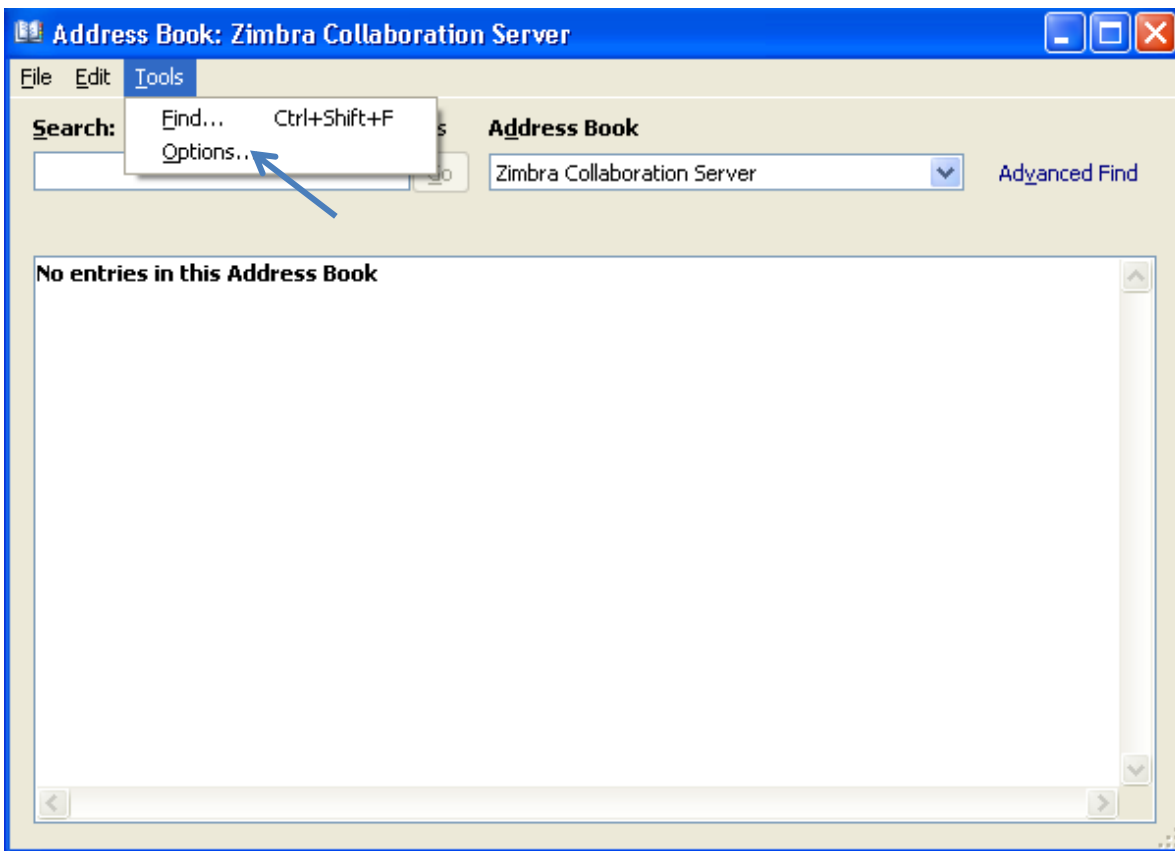


Figure 3 - Address Book Options

3. In the “Addressing” window, verify that the “Start with Global Address List” is checked, and then click on “Choose Automatically” to access the drop-down list of addresses.

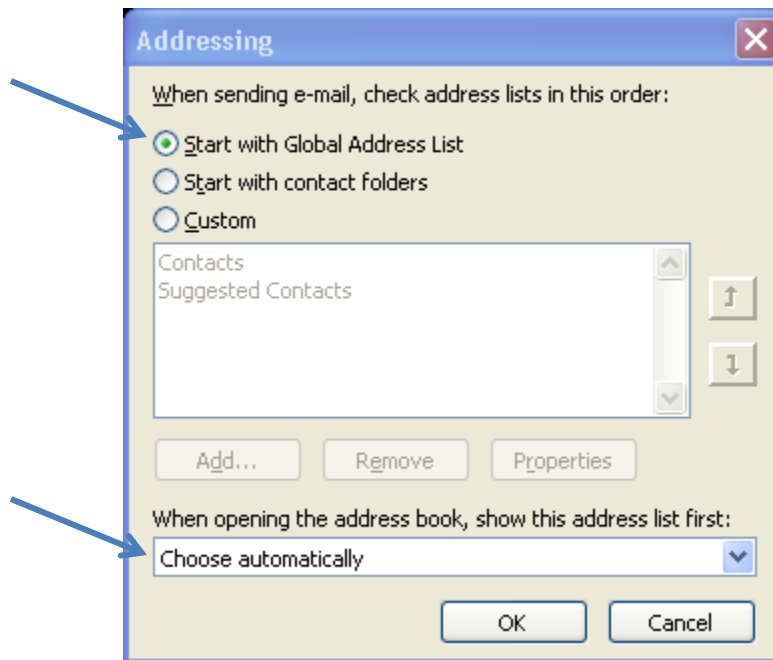


Figure 4 - Addressing

4. Select **Global Address List**.

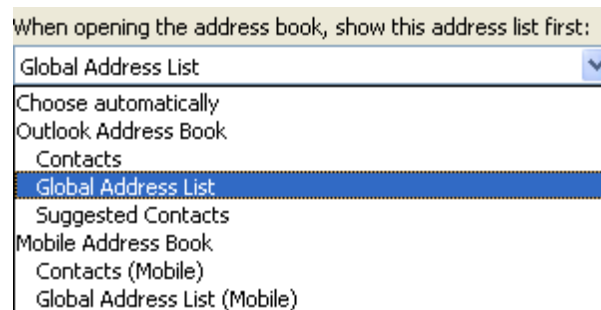


Figure 5 - Global Address List

5. Click **OK**.
6. Close the “Address Book: Global Address List” window.

## Creating a Message

### Addressing

1. From the **Home** tab, click on **New E-mail** on the left end side of the ribbon.

The “Message” window opens.

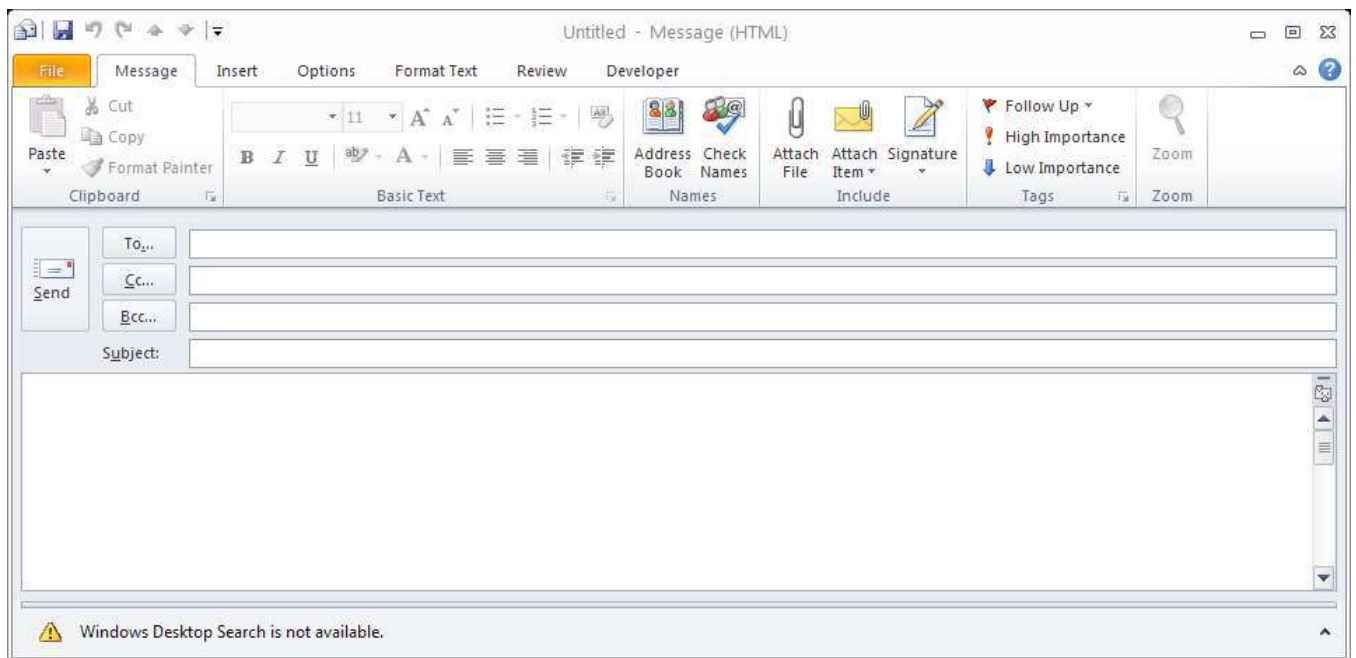


Figure 6 - Message Window

2. To select names from the Global Address List, click the **To...** button.
3. To be able to search by first name, last name, or username, click the **More columns** radio button. (see Figure 7)

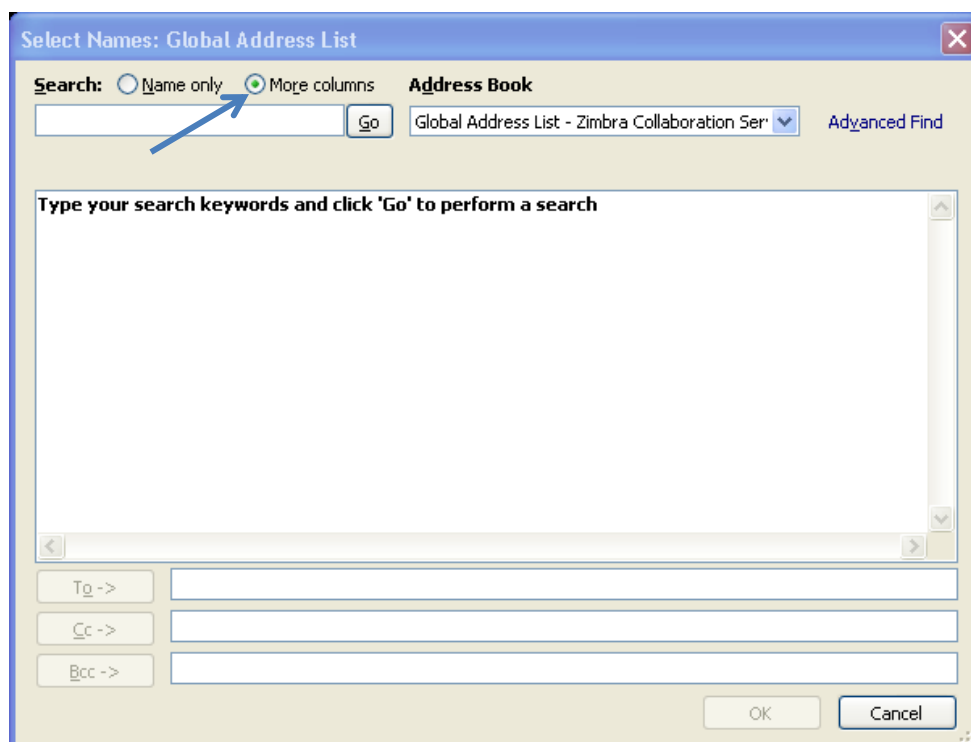


Figure 7 - More Columns Search

4. Type in the name that you are searching for and click on the **Go** button.
5. Select the name from the results list by clicking on it:
  - a. **Double-clicking** the name will add it to the **To ->** field.
  - b. **Single-clicking** the name will allow you to place it on the **Cc->** or **Bcc->** field by clicking on the appropriate button.
6. Repeat the search if you need more names.
7. Click **OK**.

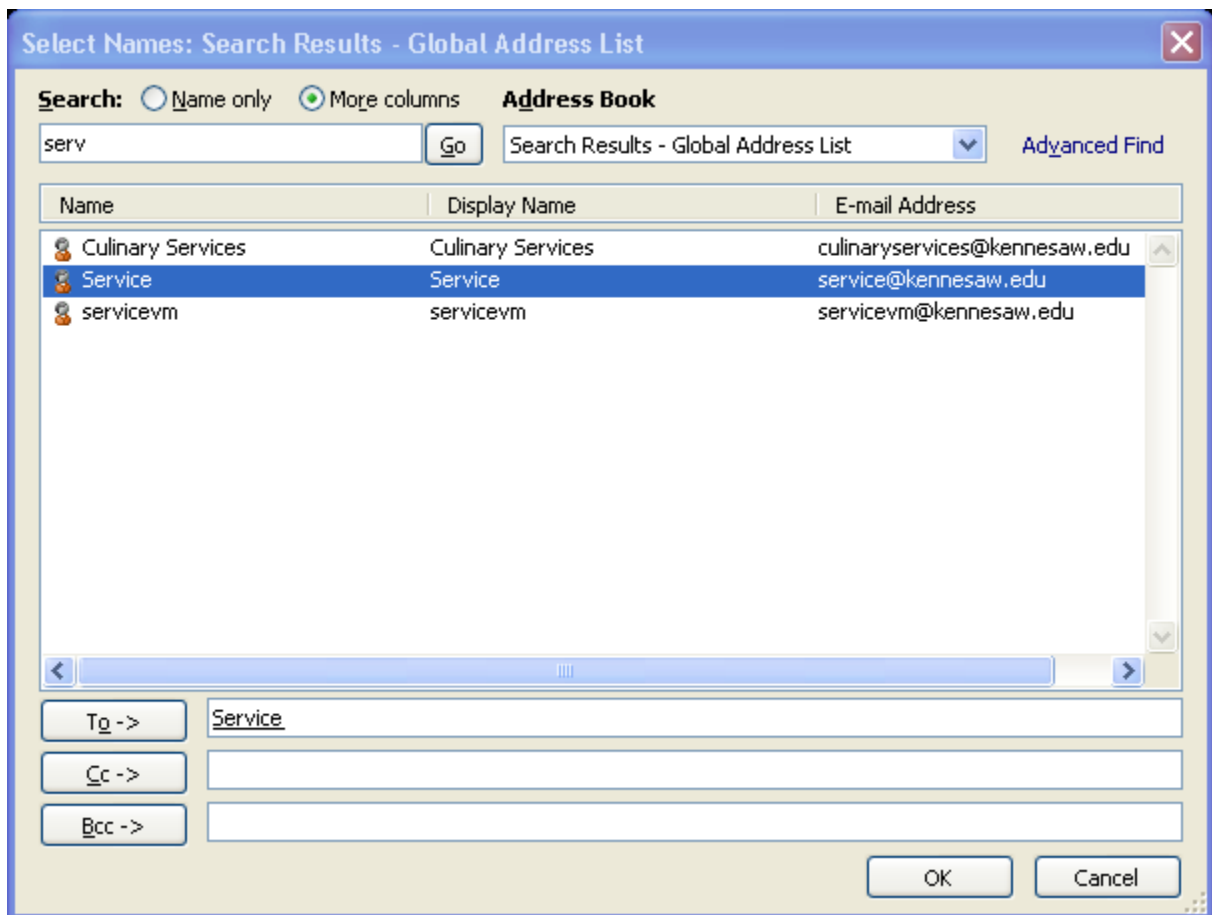


Figure 8 - Select Names

## Formatting text

1. From the **Message** tab, you have access to **Basic Text** formatting options on the ribbon.

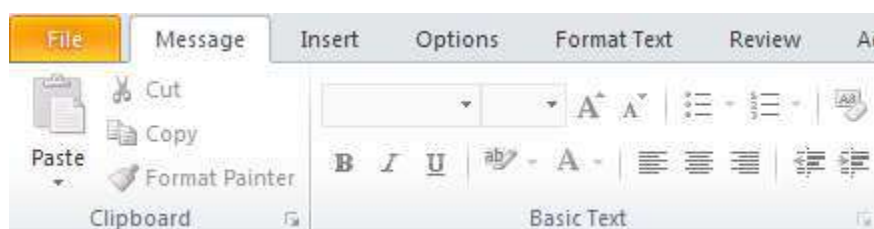


Figure 9 - Basic Text Formatting



2. From the **Format Text** tab, you have access to Word-like features, including font, paragraph and styles properties. You can also choose to format your message in html, plain text, or rich text.

### Changing the background

You can apply different types of backgrounds to your message: solid color, gradient fill, textured, or patterned. You may also use a picture as the background.

#### To apply a solid color background:

From the **Options** tab, click on **Page Color**.

Select one of the readily available Theme and Standard Colors or click on **More Colors...**

The selected solid background color will be applied automatically.

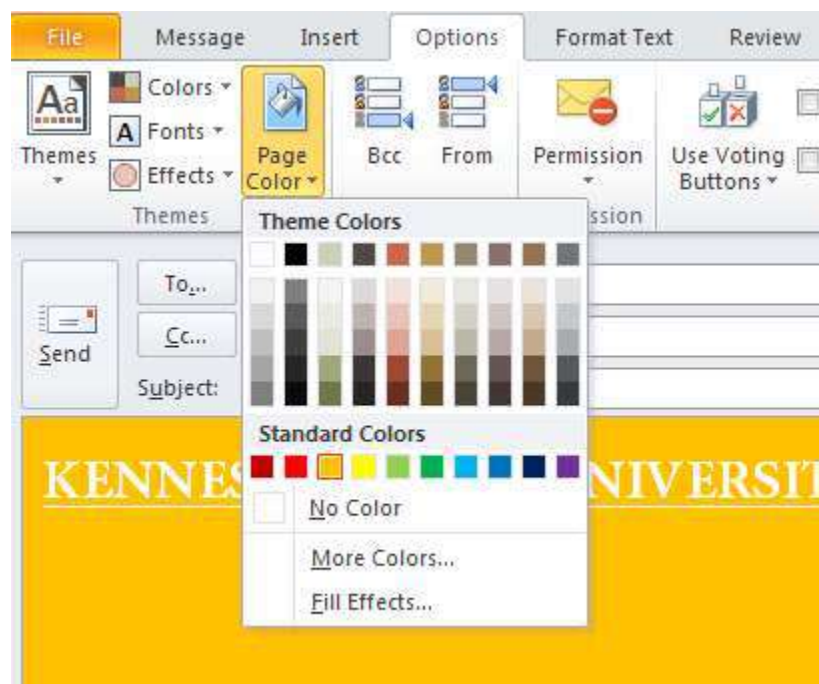


Figure 10 - Solid Background Color

#### To apply any other type of background:

1. From the **Options** tab, click on **Page Color**.
2. Click on **Fill Effects...**
3. Click on the desired tab: **Gradient**, **Texture**, **Pattern** or **Picture**.

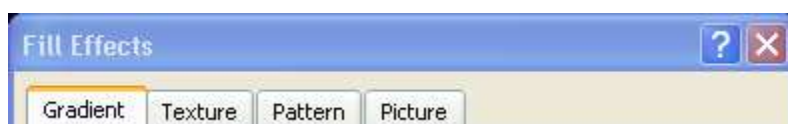


Figure 11 - Fill Effects Tabs

In the example below, a gradient fill based on two colors and a diagonal up shading style is applied to the background.

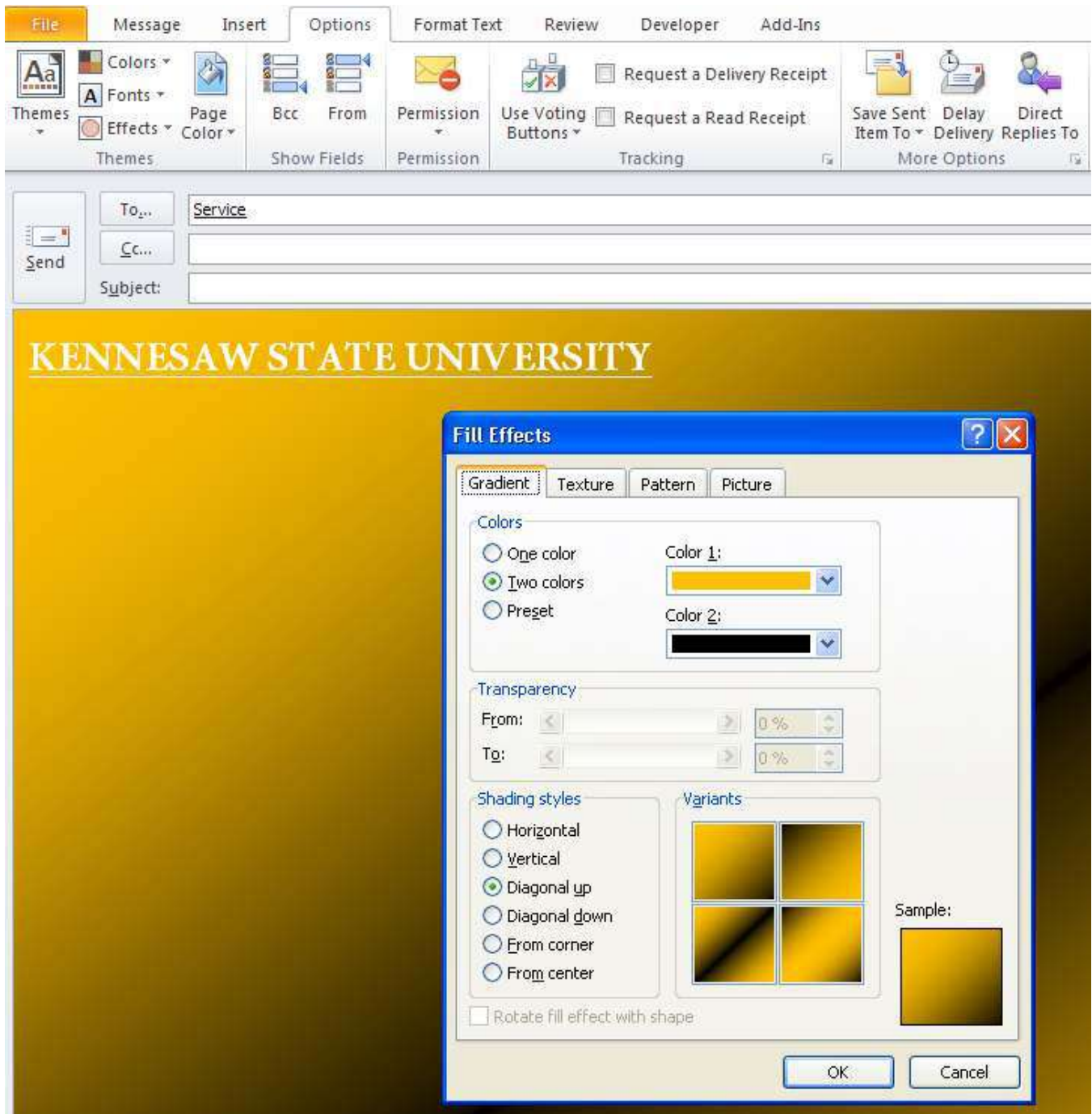


Figure 12 - Gradient Fill Background

To insert a picture as background:

1. From the **Options** tab, click on **Page Color**.
2. Click on **Fill Effects...**

3. Click on the **Picture** tab.
4. Click on the **Select Picture...** button.
5. Browse your local drive for the picture, select it, and click on the **Insert** button.

A preview appears on the “Fill Effects” screen.



Figure 13 - Picture as Background

6. Click on the **OK** button.

## Proofing

Outlook 2010 is set to automatically spell check your message before it is sent out.

From the **Review** tab, you can manually do a spelling and grammar check. You can also use the thesaurus, research and word count tools.



Figure 14 – Review Tab

If your message is in a language other than US English, you may change the proofing language:

1. From the **Review** tab, click on **Language**.
2. Click on **Set Proofing Language...**
3. Select the desired language from the list.
4. Click on the **OK** button.



Figure 15 - Other Proofing Language

## Attachments

In Outlook you can attach one or more files, as well as other messages or appointments.

To attach a file:

1. From the **Insert** tab, click on **Attach File** (paper clip) in the **Include** group of the ribbon.
2. Browse your local drive, select the file to be attached, and click on the **Insert** button.

To attach another message or appointment:

1. From the **Insert** tab, click on **Outlook Item** (envelope & paper clip) in the **Include** group of the ribbon.
2. Locate and select the item that you want to attach in the “Insert Item” window, and click on the **OK** button.

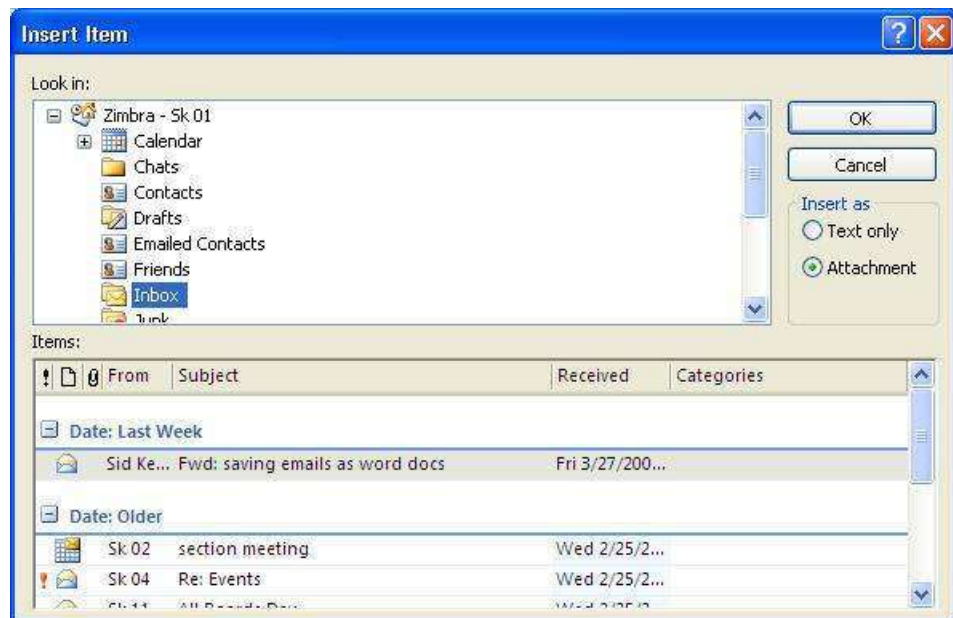


Figure 16 - Message Attachment

## Signatures

To create and store one or more signatures in Outlook:

1. Click on the **File** tab.
2. Click on **Options**.

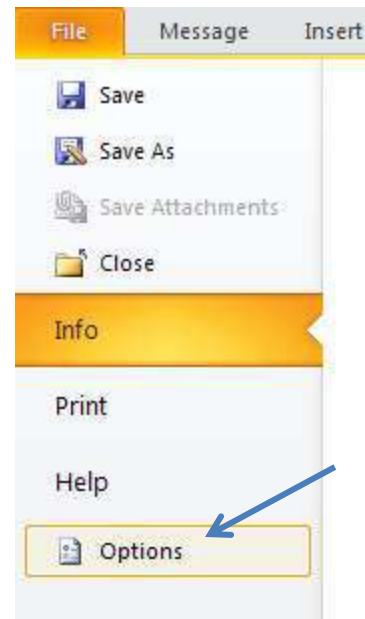


Figure 17 - Outlook Options

3. On the “Outlook Options” screen, click on the **Signatures** button.

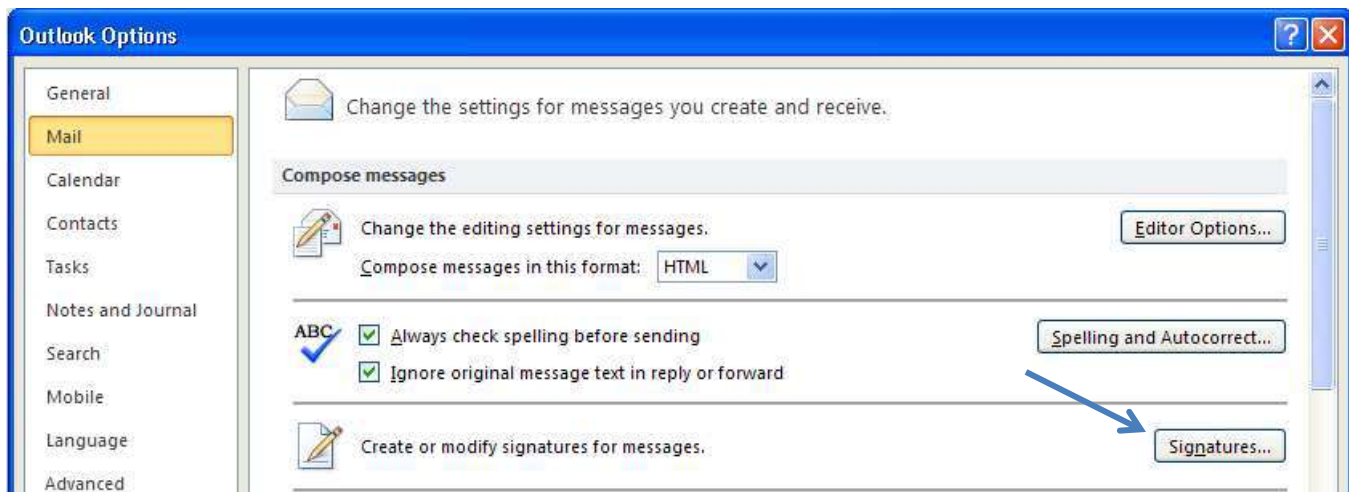


Figure 18 - Signatures Options

4. In the “Signatures and Stationery” window, from the **E-mail Signature** tab, click on the **New** button.
5. Type a name for this signature.
6. Click in the **Edit signature** area and type your signature as you want it to appear.
7. Click the **Save** button.
8. Repeat the process for additional signatures.

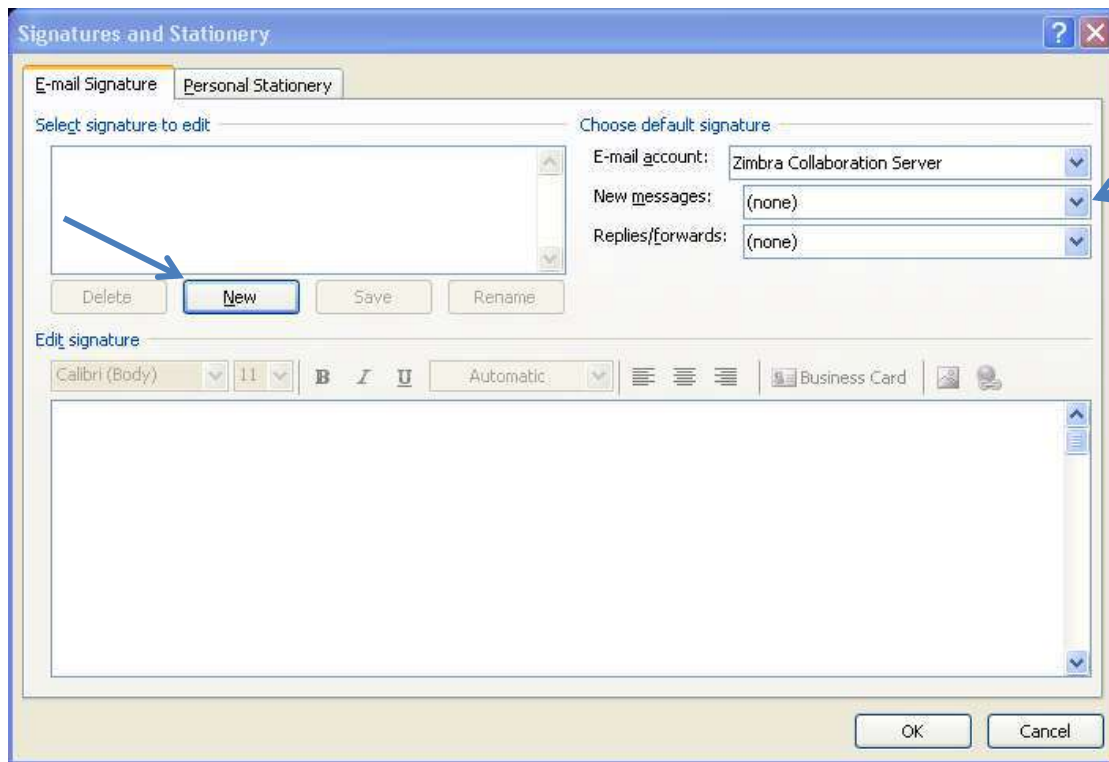
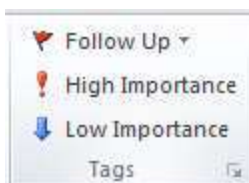


Figure 19 - New Signature

9. Select the signature you want to use as the default from the drop-down lists in the “Choose default signature” area.
10. Click on the **OK** button to confirm your new signature.
11. Click on the **OK** button again to exit the “Outlook Options” screen.

### Importance Level



To mark a message as “high priority”:

1. Go to the **Message** tab.
2. Click on **High Importance** in the Tags group.

Figure 20 - Importance Levels

### Delay Delivery

Outlook allows you to delay delivery of a message until a particular date and time. Note that Outlook must, however, be up and running in order for the message to be sent out.

1. In the “Message” window, click the **Options** tab.
2. In the **More Options** group, click on **Delay Delivery**. The **Properties** window opens.



Figure 21 - Delay Delivery

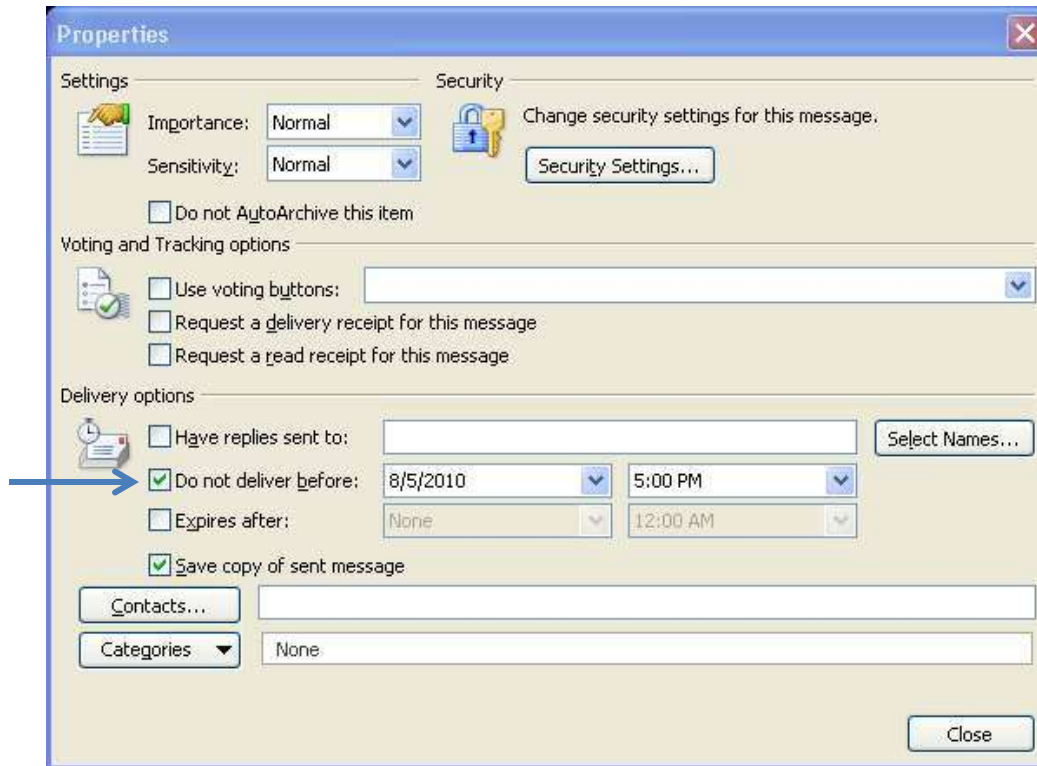


Figure 22 - Delay Delivery Properties

3. In the **Delivery Options** section, check the “Do not deliver before” checkbox.
4. Enter the date and time after which you want the message delivered.
5. Click on the **Close** button.

## Saving a message as a file

Both sent and received messages can be saved as files

1. Locate and select the message with a single click.
2. Click on the **File** tab.

3. Click on **Save As**.

The "Save As" window opens.

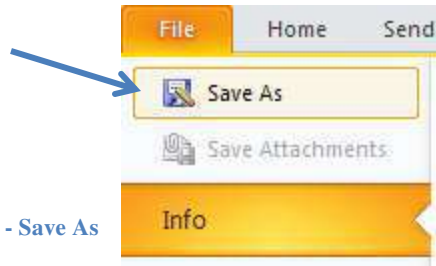


Figure 23 - Save As

4. Browse to the location where you want to save the message.
5. By default, the file name is the title of the message. You can change the name.
6. Click on the **Save as type**: drop-down arrow to change the file format to either **text** or **html**.

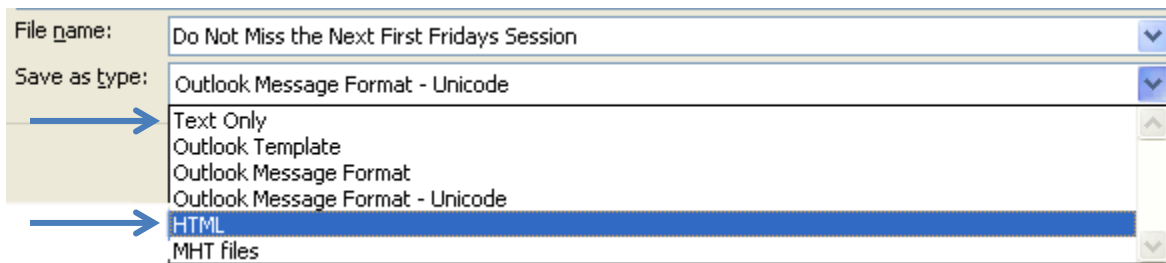


Figure 24 - Save As Options

## Calendar

To view the Calendar, click on the **Calendar** button in the Navigation Bar.

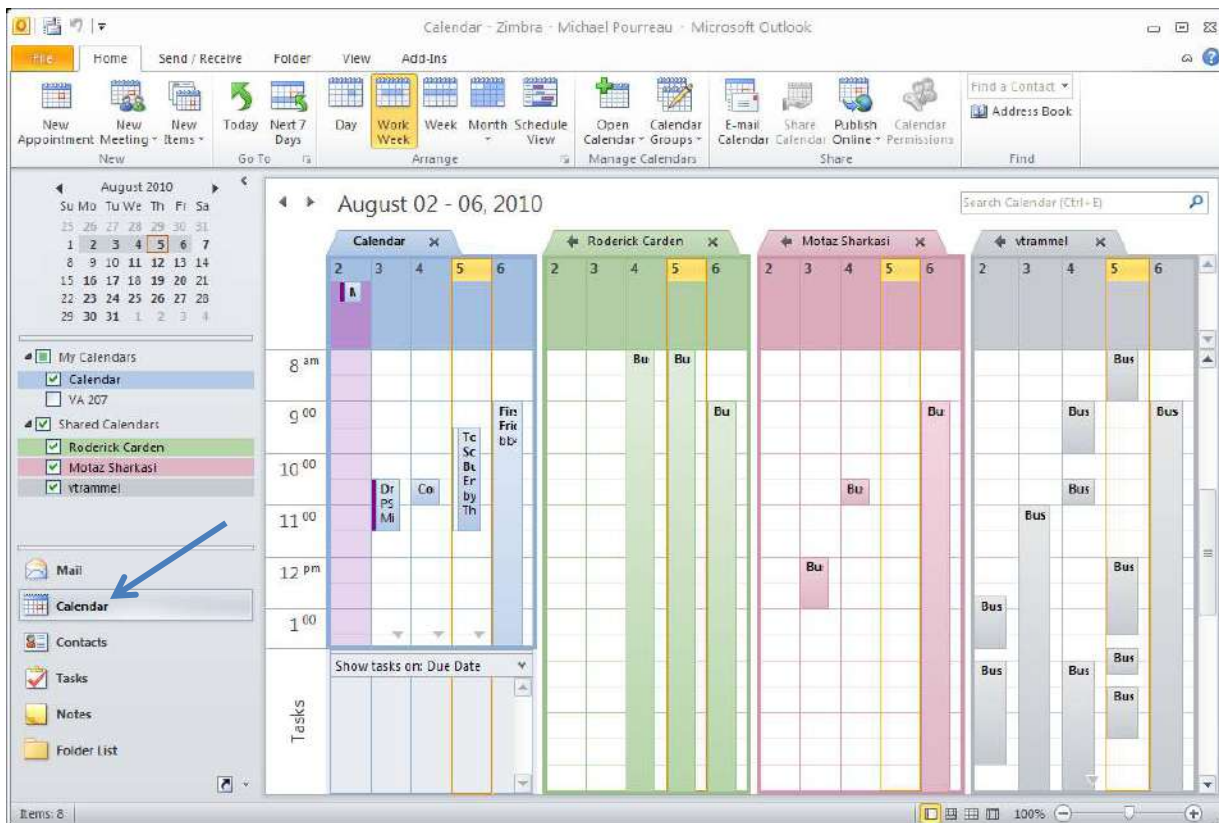


Figure 25 - Calendar



## Creating an Appointment

1. From the **Home** tab, click on **New Appointment**.

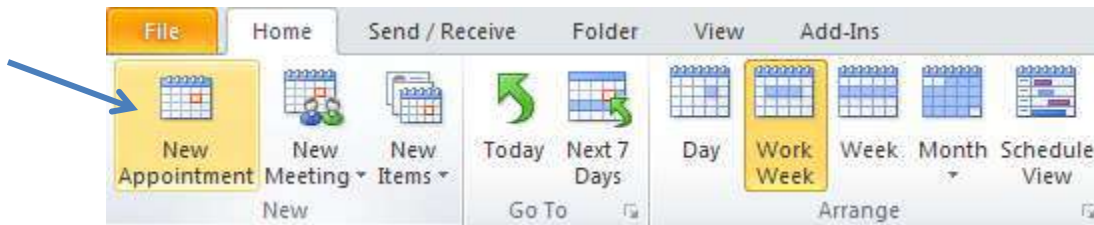


Figure 26 - New Appointment

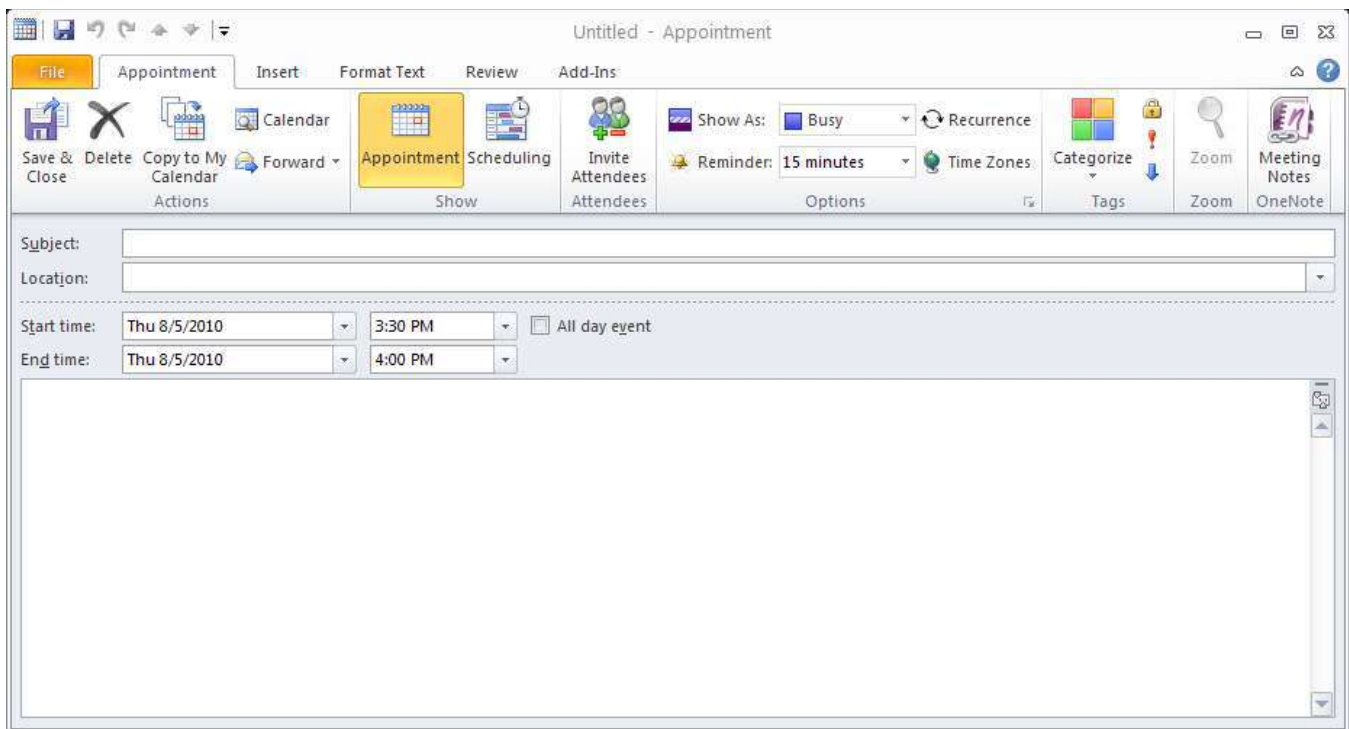

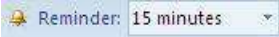


Figure 27 - Creating a New Appointment

2. Enter the appointment information in the “Appointment” window.
3. Select how you would like to display the appointment in the Calendar from the **Show As**  drop-down list in the Options group.
4. Set the reminder notification time from the **Reminder**  drop-down list in the Options group.
5. Click on the **Save & Close** button in the Actions group.

## Creating a Recurring Appointment

1. Create an appointment. (See [Creating an Appointment](#).)

2. Click on **Recurrence** in the Options group.

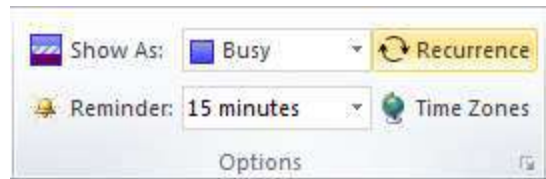


Figure 28 - Recurrence

3. In the **Appointment Recurrence** dialog box, set the pattern and range of recurrence for the appointment.

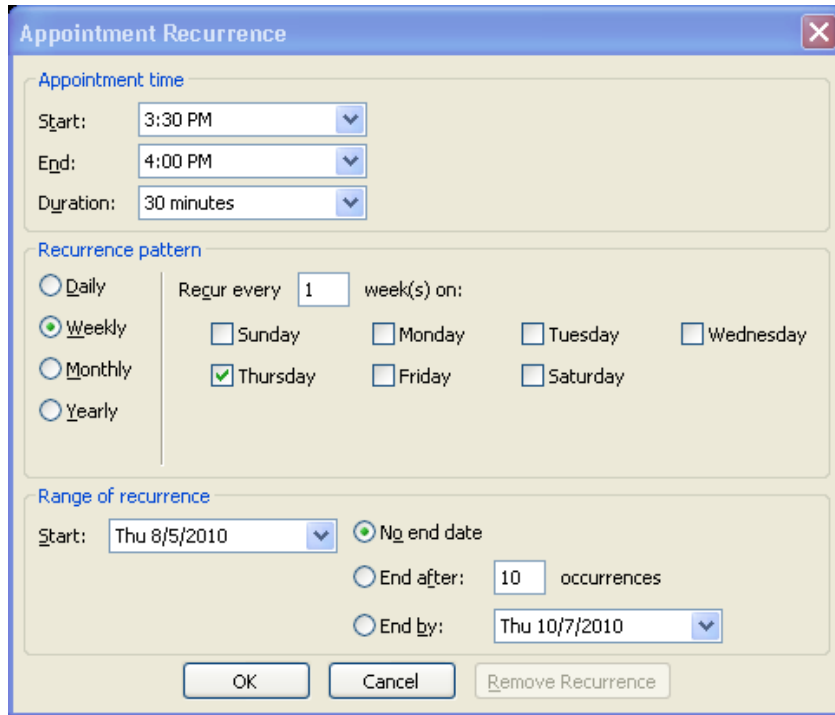


Figure 29 - Recurrence Settings

4. Click **OK**. The “Appointment” window now indicates that the appointment is recurring.



Figure 30 - Recurrence in place

5. Click **Save & Close**.

## Scheduling a Meeting

The “Invite Attendees” feature allows you to send an appointment invitation via email to people that you want to attend a meeting.

1. Create an appointment. (See [Creating an Appointment.](#))
2. Click the **Invite Attendees** button in the Attendees group.

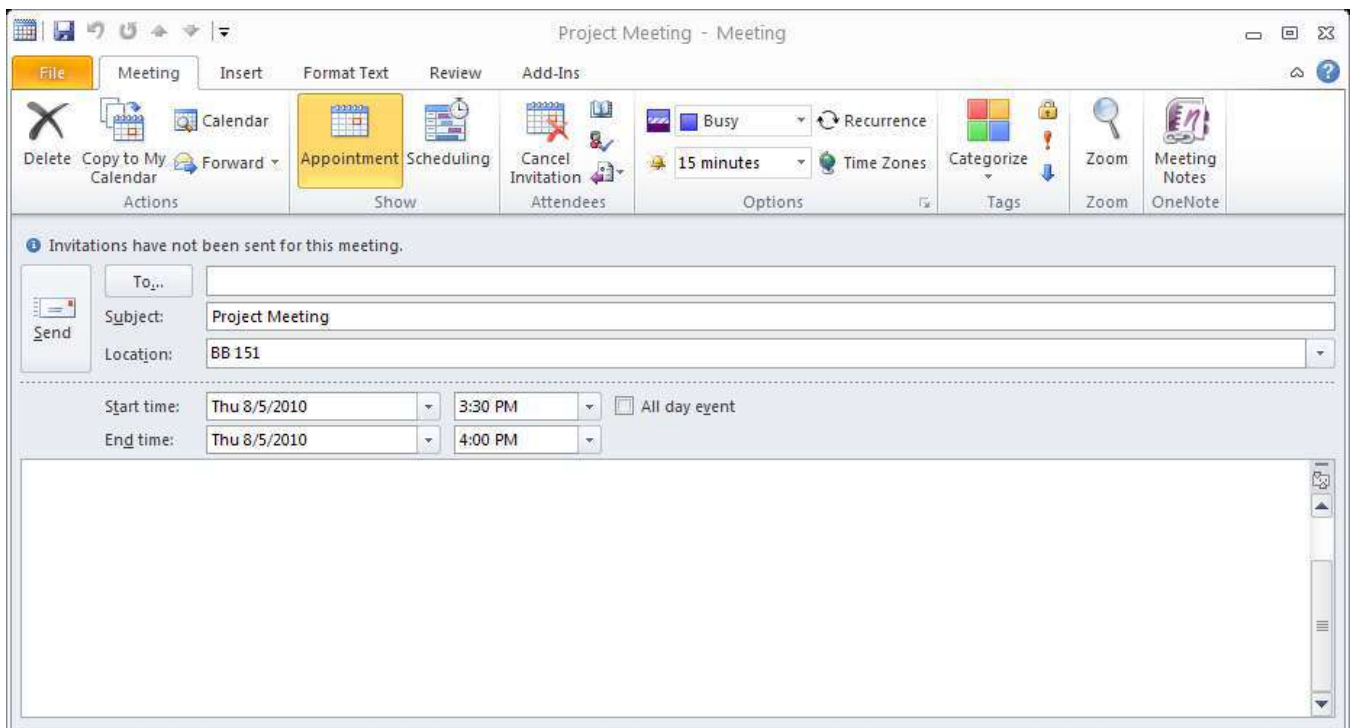


Figure 31 - Invite Attendees

3. Click the To... button.

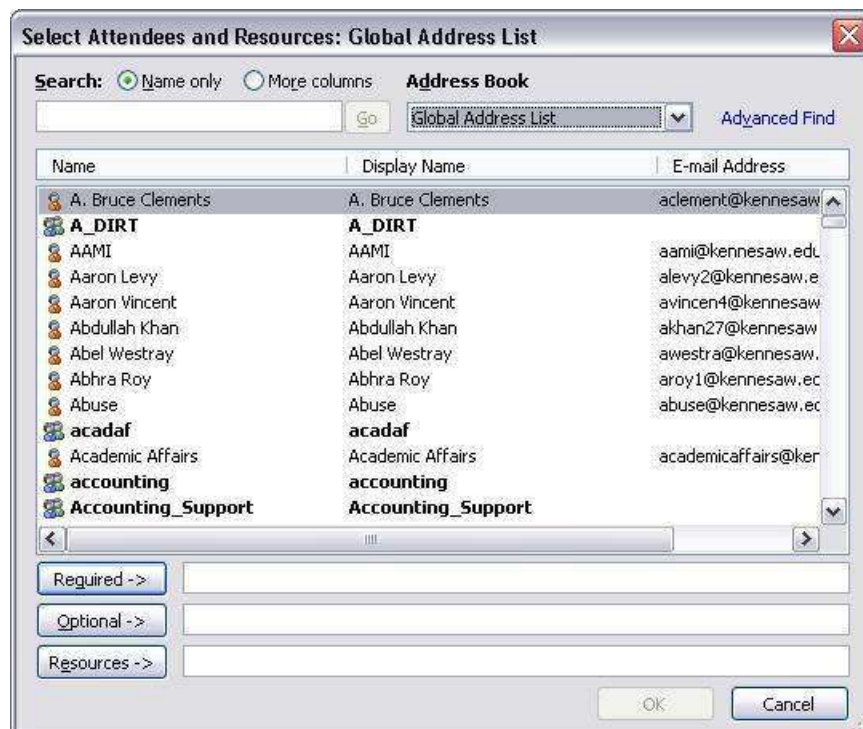


Figure 32 - Select Attendees

The “Select Attendees and Resources” dialog box appears.

4. In the **Search** field, enter the first name of the person, or, the name of the resource that you are looking for.
  - To search by last name or username, click the **More columns** radio button, and then enter the last name or username and click the **Go** button.
5. Double-click the name, or, select the name and then click the **Required** button. *Disregard the **Optional** and **Resources** buttons.*
6. When you have selected all the attendees, click the **OK** button. You will be returned to the Appointment (Meeting) window.
7. Click on **Scheduling** in the Show group to check the schedules of the prospective attendees and see if they are available at the time of the meeting.

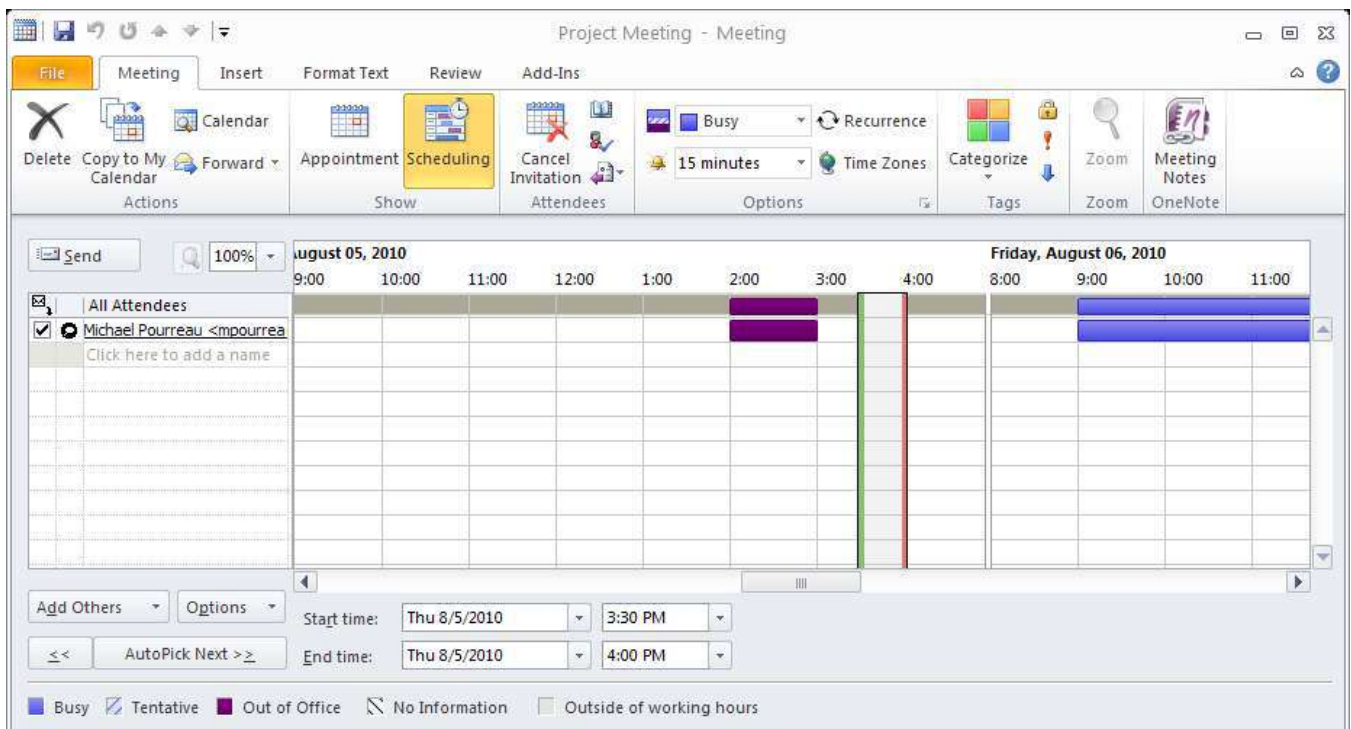


Figure 33 - Scheduling

In the Scheduling area, you will see the name of each attendee and the blocks of time when he/she is busy and free during the date period of the meeting. If necessary, you can change the date and/or time of the meeting on this screen.

8. Click the **Send** button to send the appointment invitation email.

To return to your inbox, click on **Mail** in the Navigation Bar.

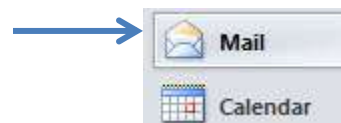


Figure 34 - Return to Inbox

## Notification of New E-mail

Depending on your configuration, Outlook 2010 may display an envelope icon in the Windows taskbar whenever new e-mail, meeting requests, or other items arrive. This is an easy way to determine when you need to deal with new items in your Inbox without having to keep the Outlook window visible on-screen.

You can customize the **Desktop Alert Settings** from the “Outlook Options” screen.

1. Click on the **File** tab.
2. Click on **Options**.

The “Outlook Options” screen appears.

3. In the **Message Arrival** section, check or uncheck the different options such as “Show an envelope icon in the taskbar” as desired, underneath “**When new messages arrive:**”.
4. You may click on the **Desktop Alert Settings...** button to customize the alert display.

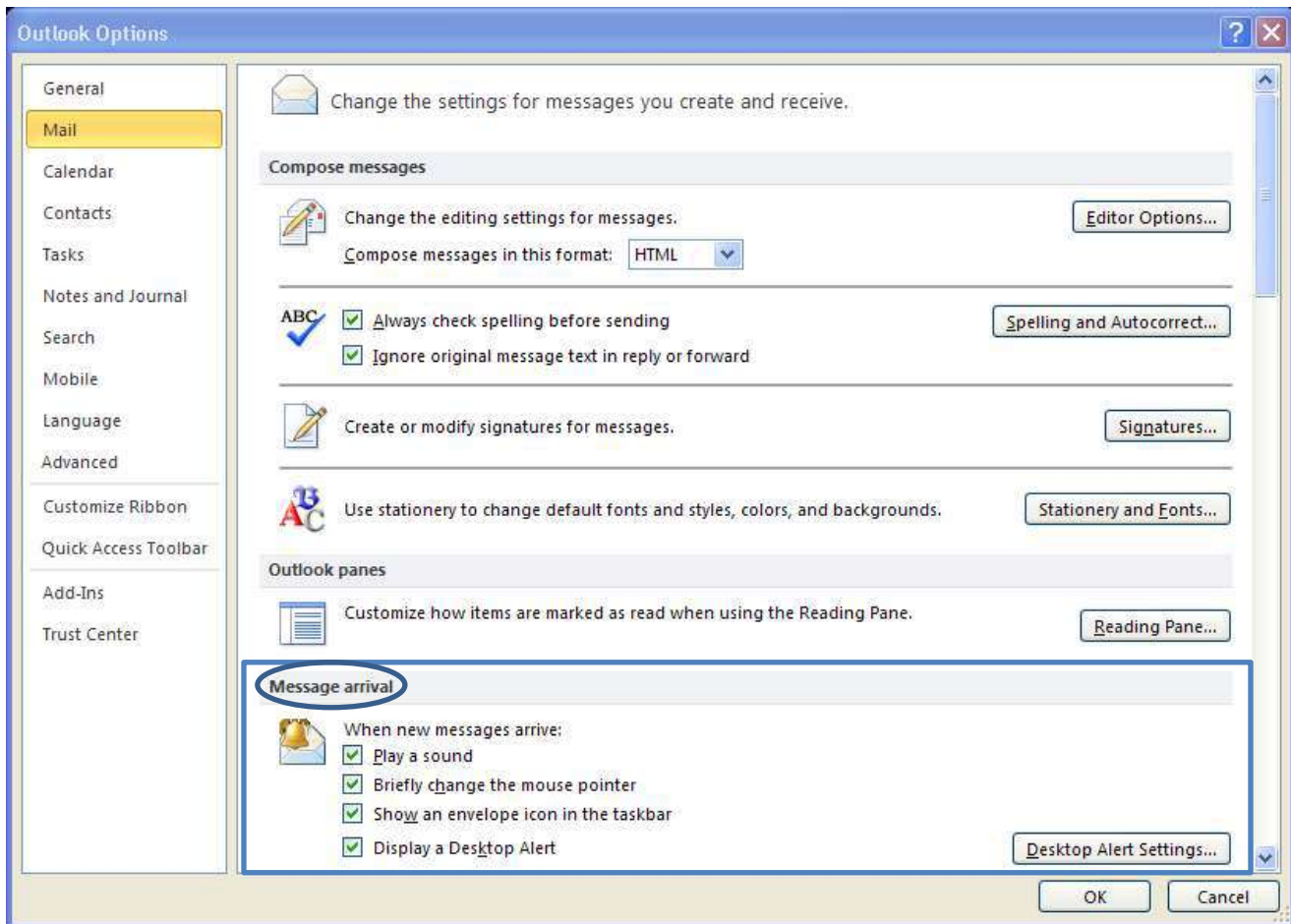


Figure 35 - Message Arrival

5. Set how long notification alerts are to be displayed on-screen.



6. Click on the **OK** button.

## Displaying Shared Items

Sharing of items between users must be done in Zimbra before those shared items can be displayed and used in Outlook. For instructions on sharing items, and accepting shared items in Zimbra, refer to pages 25 – 26 in the Faculty and Staff Email Collaboration Suite (Zimbra) booklet.

It is easy to import into Outlook 2010 an item that has been shared in Zimbra.

For example, to view shared calendars:

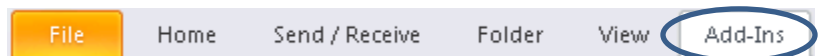


Figure 36 - Add-Ins Tab

1. Click on the **Add-Ins** tab at the far right of the tabs menu.
2. Click on **Other User's Mailbox**.
3. Type the first name of the user and double click the name from the list.
4. After the import occurs ensure you are viewing the calendar.
5. In the calendar folder list to the right, put a check mark next to the calendar you wish to view.

- Repeat for each individual you want to add to your calendar view. You can remove the check mark without removing the calendar from your account. It will only remove the view.

## Archiving with Outlook

Using Outlook, you can archive items either automatically or manually. **AutoArchive** is turned off by default, but you can turn it on if you choose.

### Specify AutoArchive Settings

- Click on the folder you would like to archive. (i.e.: Inbox)
- Go to the **Folder** tab.
- Click on **AutoArchive Settings**.



Figure 37 - AutoArchive Settings

The “Folder Properties” screen appears.

- Select “**Archive this folder using these settings:**”
- Specify at which point in time items in the folder are to be automatically archived.
- Select “**Move old items to:**”
- In the path field, enter C:\Users\yourNetID\My Documents\Outlook Files\archive.pst

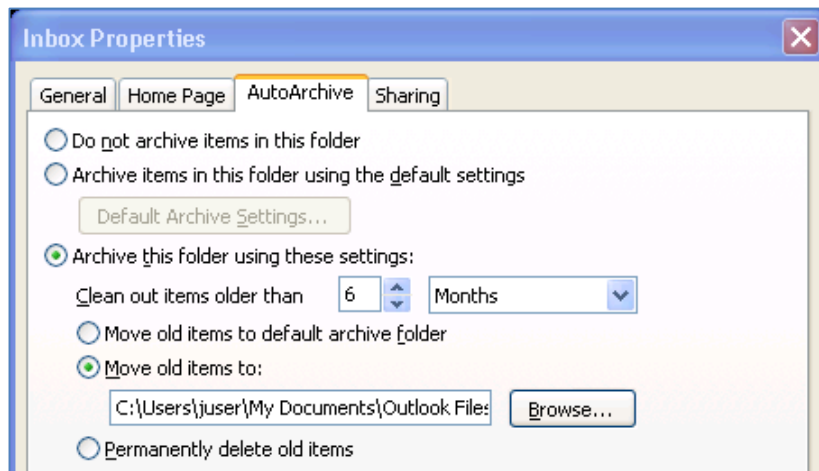


Figure 38 - AutoArchive Properties

8. Click on **Apply**.
9. Click on **OK**.

### Manually Archive Items

1. Go to the **File** tab -> **Info**.
2. Click on the **Cleanup Tools** button.
3. Click on **Archive...**

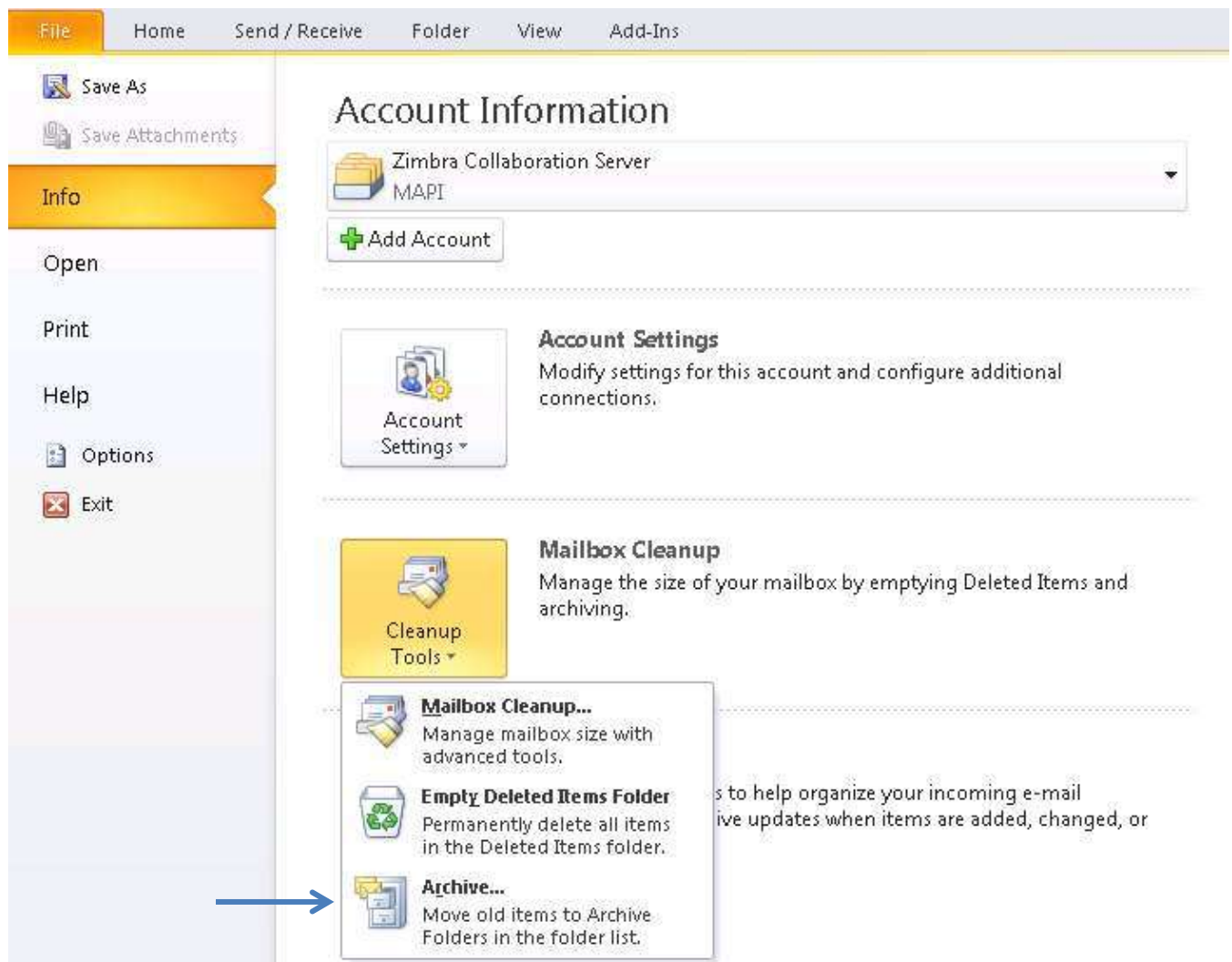


Figure 39 - Cleanup Tools

The “Archive” screen appears.

4. You may either select “Archive all folders according to their Auto-Archive settings”, or, click a folder in the list, and then select “Archive this folder and all subfolders”.



5. Set the appropriate date in the “Archive items older than” field.

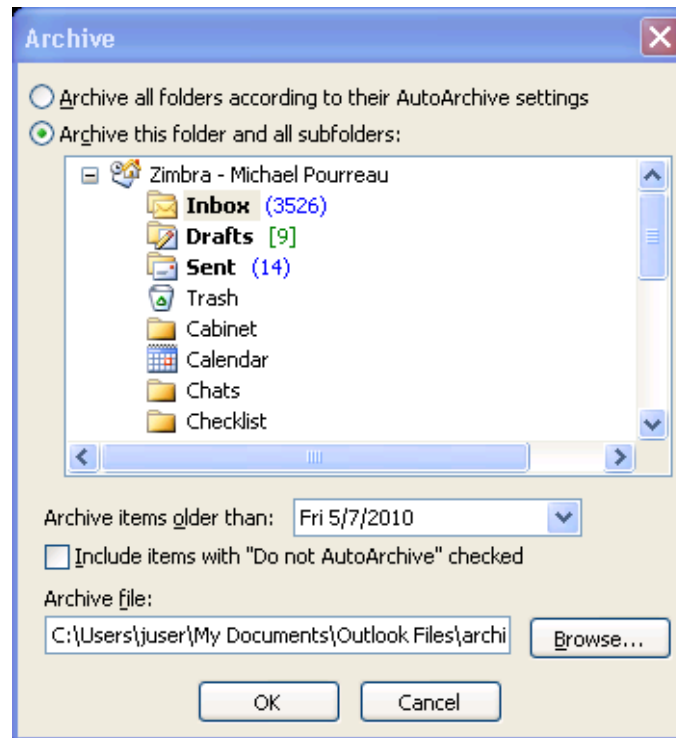


Figure 40 - Archive

6. If you want to change the location of your archive file, click the **Browse** button, and then navigate to the location you want.
7. Click **OK**.

In your Folder List, you will now see an entry called “Archive Folders”.



Figure 41 - Archive Folder

Clicking the plus sign to the left of “Archive Folders” will expand the Archive Folders list, and reveal any folders that you have archived. The existing folder structure of your mailbox will be maintained.

You work with items in your archives the same way that you work with items in your mailbox. You can move individual items into and out of archived folders by dragging and dropping.