

## Integrating Clouline with Outlook

### Welcome

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Thank you for choosing the Clouline email messaging service for your organisation.

If you follow these guidelines you should have your account functioning in very little time, ready to enjoy the powerful messaging and collaboration features on offer.



# GMS

# Clouline

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## Integrating Cloudline with Outlook

### How do I install and register the Cloudline Outlook Collaboration client plug-in?

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#### Question Details:

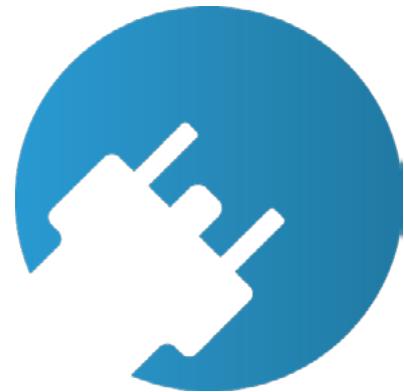
The Collaboration client is a tool that allows Cloudline users to access the advanced features of Microsoft Outlook including Contacts, Calendaring, Scheduling, Tasks, Journals and Notes and the ability to share these folders with colleagues. When using the Collaboration client both Outlook and Cloudline webmail users can share data, e.g.: a shared calendar.

#### Answer:

#### Download the plug-ins from the from the Cloudline website

Variants are available for multiple Outlook versions

- **Outlook 2002/XP – 2007**
- **Outlook 2010 (Office 32-bit)**
- **Outlook 2010 (Office 64-bit)**



**Pre-installation:** Please ensure that you have closed your Microsoft Outlook email before installing the Cloudline Outlook plug-in.

**Installation:** The installation of the Cloudline Outlook Collaboration client plug-in is simple. Download the application to your computer and double click on the application icon to run it and follow the on-screen instructions. You may also make the installation available to yourself or to any user that logs on to the computer. This is particularly useful for administrators installing on behalf of users as they need only install once with no further changes required later on.

**Registration:** Once the Cloudline Outlook Collaboration client plug-in has been installed, it now needs to be registered within the host application - Microsoft Outlook. This can be done through system profiles.

- Open the **Mail** icon in the Control Panel to launch the **Mail Setup** dialog. This may be under 32-bit control panel icons if you are running on 64bit Windows.
- Select the **Show Profiles** option then click on the **Add** button to create a new profile. Choose a profile name and click OK.
- Select the **"Add a new email account"** option and click on the Next button.
- Select the **"Additional Server Types"** option and click on the Next button.
- Select **GMS Server** from the list of Additional Server Types and click on the **Next** button.

## Integrating Cloudline with Outlook

### How do I install and register the Cloudline Outlook Collaboration client plug-in?

Next, the following Cloudline dialog box should appear which means that the Outlook client has been correctly registered and now just requires some basic configuration.



You will need to specify the Cloudline server hostname to connect to along with your user account name (full e-mail address) and password. Unless otherwise stated, the server address will always be: **mail.domain.com**

If you wish your password to be saved and re-used automatically please check the **Save password** option. If you leave it unchecked you will be asked to enter the password each time you start Outlook.

Upon finalising the above, the main Outlook client configuration is complete. The next time you start Outlook and select your newly created profile, the Cloudline Collaboration client should be running.

If you encounter a dialog box stating that the Cloudline Outlook Collaboration client plug-in can only work in 'Email only' mode, this likely means that your Outlook is unable to connect to the Collaboration service on the Cloudline server. This is TCP port 8376 or 8377 when using SSL.

The most likely cause of this is that your local firewall software is restricting outbound traffic on this port. If you are sufficiently technical to work towards resolving this then please do so, otherwise please contact your local administrator or Support representative.

# Integrating Cloudline with Outlook

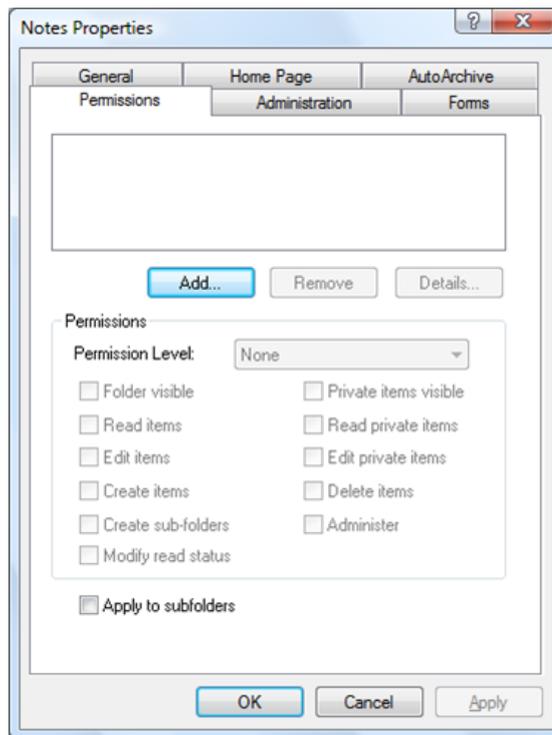
## How do I share (publish) my information from Outlook?

### Question Detail:

I use Microsoft Outlook with the Cloudline Outlook Collaboration client plug-in and I need to share my data with other people. How do I do this?

### Answer:

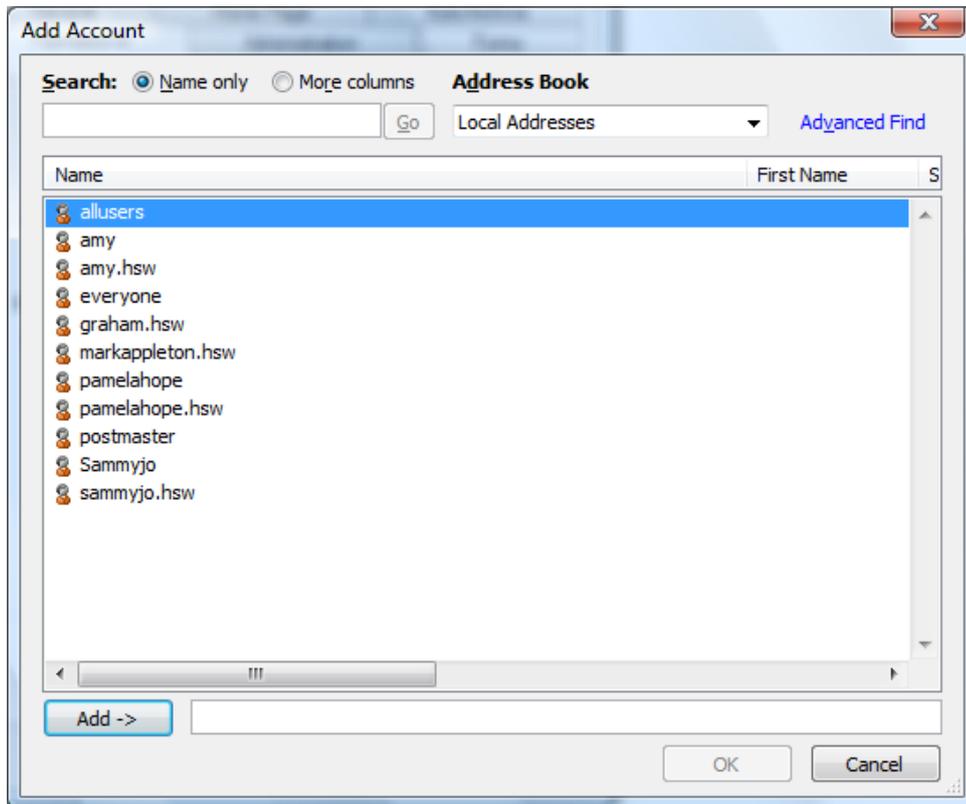
Simply right click on the folder you wish to share with another user. One of menu items should be **Properties**. Now select the **Permissions** tab to launch the permissions dialog box.



# Integrating Clouline with Outlook

## How do I share (publish) my information from Outlook?

Click **Add** and choose from the list, the Clouline accounts to which you wish to give access (these will be users on your domain). If necessary, choose a different address book. Select each account and click **Add**. Then click **OK**.

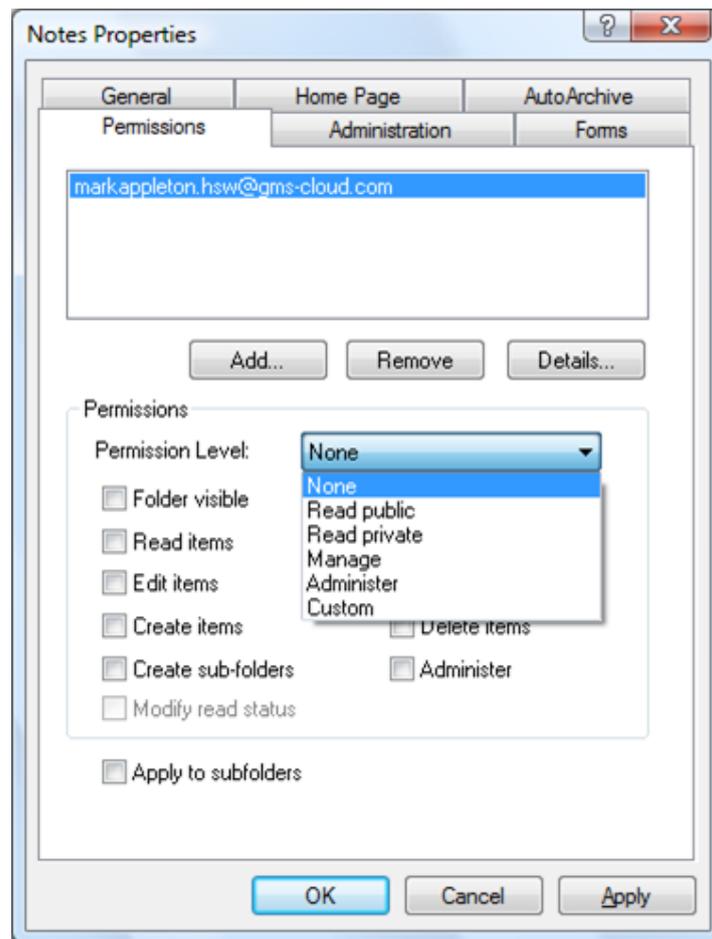


The level of permission access can be set to one of five pre-defined levels or it can be customised as required.



# Integrating Cloudline with Outlook

How do I share (publish) my information from Outlook?



Click OK to save the settings.



# Integrating Cloudline with Outlook

## How do I view (subscribe) someone else's shared folders in Outlook?

### Question Detail:

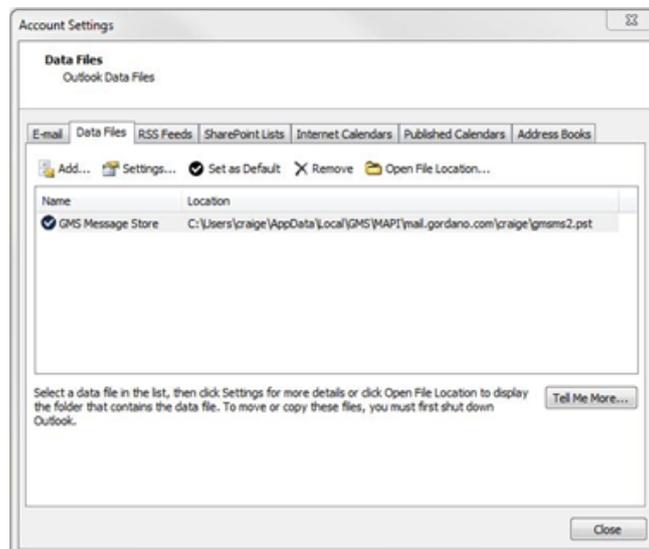
I use Microsoft Outlook with the Cloudline Outlook Collaboration client plug-in and want to access a shared folder of my colleague who has granted me permission to do so. How do I achieve this?

### Answer:

Depending on whether you are running Outlook 2010 or earlier versions, access to the appropriate Cloudline (GMS) configuration pages will differ slightly.

To access the settings dialog box in either Outlook XP/2003/2007, click: File > **Data File management**

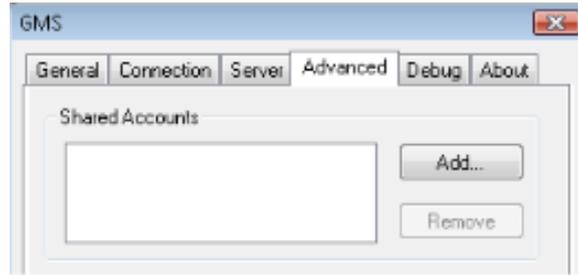
To access this in Outlook 2010, click **File** from the top left hand corner and then go to **Info**, then **Account Settings**. Directly underneath this is another button also named **Account Settings**. Click this and a new window will open where you will need to click the **Data files** tab located near the top and you should see the GMS Message Store as shown below.



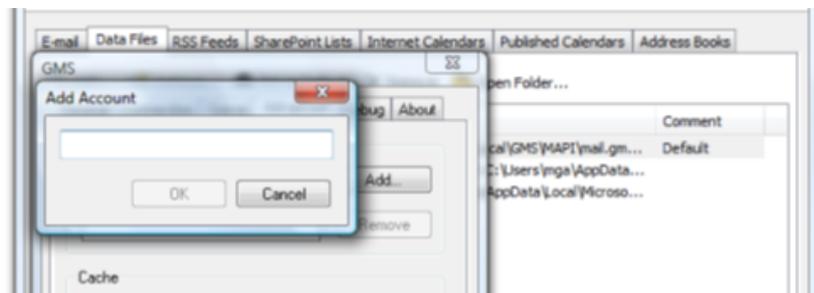
Either double click the GMS Message Store or click Settings to launch a new dialog. Now, switch to the Advanced tab

# Integrating Cludline with Outlook

How do I view (subscribe) someone else's shared folders in Outlook?



Click **Add** and enter the email address (or portion of the email address) of the Cludline account that has shared their folders to you. Click **OK**. The Account will be listed and a new message store with their shared folders should appear in your Outlook folder list view.



The next page of this guide will show the equivalent enablement of account sharing but through the Cludline webmail client instead of Microsoft Outlook. Additionally it will show a replicated data view that is accessible from both Cludline webmail and Microsoft Outlook.

