# Kerio Connect

## User Guide

Kerio Technologies

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# Introduction

This document provides detailed setting guidance for all applications and modules (email clients, calendars and address books, data synchronization) supported by *Kerio Connect*.

While some of these applications are supported directly (i.e. no additional installations are needed, it is only necessary to perform specific settings), others require installation of supportive modules and extensions.

In addition to external applications, this document also addresses the *Kerio WebMail* interface which is used to access user data and email accounts stored in the mailserver via the most wide-spread web browsers, such as *Internet Explorer*, *Firefox* or *Safari*.

This guide addresses features and configuration of the following applications and interfaces:

**Kerio WebMail**

*Kerio WebMail* is a comfortable web interface which can be used to maintain email, calendars, contacts and other folders saved in mailboxes on a particular server.
*Kerio WebMail* is available in two versions:

- *Kerio WebMail* — full version designed for most of supported browsers (see chapter 1).
- *Kerio WebMail Mini* — a special, lite edition designed for unsupported browsers or for computers with slow Internet connection (see chapter 2) and for mobile devices (see chapter 3).

**Microsoft Outlook**

Support for *Microsoft Outlook* is allowed by two extension modules which enable better exploitation of *Kerio Connect's* groupware features:

- *Kerio Outlook Connector (Offline Edition)* — is an extension for *MS Outlook* allowing smoother cooperation of *MS Outlook* and *Kerio Connect*. *Kerio Outlook Connector (Offline Edition)* supports groupware features of *MS Outlook* such as planning of meetings and task assignment. In addition to these features, other are included such as message grouping, searching in message bodies and offline mode which allows users working with *MS Outlook* even without Internet connection. This feature is helpful especially for notebook users.
  In detail, *Kerio Outlook Connector (Offline Edition)* is described in chapter 5.
- *Kerio Outlook Connector* — an extension to *MS Outlook*. It allows scheduling and sharing different types of data. Thanks to this module, *MS Outlook* is able to work with groupware data (contacts, calendar, tasks, notices) stored in *Kerio Connect*.
  In detail, *Kerio Outlook Connector* is described in chapter 6.

### Windows Calendar

*Windows Calendar* is an *Microsoft Corporation's* application used for management of calendars. Support for *Kerio Connect* allows publishing of calendars on the server or subscription of any *Kerio Connect* calendar.

### Data synchronization with mobile devices

*Kerio Connect* supports data synchronization with mobile devices via the ActiveSync protocol. ActiveSync allows direct synchronization of data stored in email accounts with mobile devices (it is not necessary to connect to a desktop synchronization application). The *ActiveSync* protocol can use various applications on mobile devices (*ActiveSync* in *Windows Mobile* systems, the *VersaMail* email client on *Palm Treo* devices, *Mail for Exchange* applications on *Nokia Eseries* and *Nseries*, the *RoadSync* application, *Apple iPhone* 2.0 to 4.0, etc.). Chapter 4 provides detailed information on which folders can be synchronized and how the synchronization should be configured on individual devices.

### Microsoft Entourage

*Microsoft Entourage* is an *MS Office for Mac* email client which also supports management of personal information and groupware functions. The support provided by *Kerio Connect* is described in detail in chapter 9.

### Apple Mail

*Apple Mail* is an email client developed by *Apple Computer*. The support provided by *Kerio Connect* allows displaying of calendar and contact folders in this client (for details, see chapter 14).

### Apple iCal

*Apple iCal* is an *Apple Computer's* application used for management of calendars. The support from *Kerio Connect* works as follows:

- Since version Mac OS X 10.5, *Apple iCal* supports CalDAV which enables subscription and viewing of calendars saved in *Kerio Connect*. The protocol also supports meeting scheduling (Free/Busy and invitations) and delegating of calendars to other users (for details, refer to section 11.2).
- *Kerio Technologies* has developed the *Kerio Sync Connector for Mac* application which allows easy data synchronization between *Kerio Connect* and *Apple iCal*. The synchronization with the server allows synchronization of locally created calendars and To Do items (tasks). Details on the product are provided in chapter 13.
- *Apple iCal* calendars can be published in *Kerio Connect* and it is also possible to subscribe to any *Kerio Connect* calendar. Calendars are created and saved in the standard `iCalendar` format (for details, see chapter 11).

### Apple Address Book

*Apple Address Book* is an application developed by *Apple Computer* that is used as a standard address book (contact manager) in Mac OS X operating systems. Contacts can be synchronized with the *Kerio Connect's* store by the methods described below:

- Contacts stored in the *Apple Address Book* and in *Kerio Connect* can be synchronized by the *Kerio Sync Connector for Mac* extension. In addition to *Apple Address Book* contacts, this application can also synchronize *Apple iCal* calendars and To Do items (for details, see chapter 13).
- The address book can be synchronized with contacts stored in *Kerio Connect* also by using *Apple iSync* (for details, refer to chapter 12).
- since Mac OS X 10.6, it is possible to use synchronization via the CardDAV protocol (for details, see section 12.2.2).

Chapter 1

# Kerio WebMail

The *Kerio WebMail* is a Web interface that allows users to comfortably access their email and workgroup features from any location using a web browser. Users can read, write or delete messages, move them to and from folders, manage contacts, administer folders (create or delete folders, set access rights, etc.) and change user settings such as passwords, message filters, *Kerio WebMail* appearance, work with calendar, free time information (*Free/Busy* calendar), tasks and notes.

*Kerio WebMail* enables users to work with email, calendars, tasks, notes and contacts in a way similar to a mail client using the IMAP protocol (all items are stored in folders on the server and the client opens only the selected item, i.e. a particular message, event, etc.).

## 1.1 Web browsers

List of browsers supported by the full version of the *Kerio WebMail* interface can be found at Kerio Technologies.

For technical reasons, the full version of *Kerio WebMail* cannot be run in older versions of the listed browsers or in non-listed browsers, but it is possible to run the simplified version *Kerio WebMail Mini* (for more information, see chapter 2). *Kerio WebMail Mini* is run automatically in older versions of browsers, in text-based browsers such as *Lynx* or *Links*, in web browsers designed for mobile devices (this view type is described in chapter 3). *Kerio WebMail Mini* does not require CSS and JavaScript.

To use the secured access to the *Kerio WebMail* interface (by HTTPS protocol), the browser must support SSL encryption. If it can be configured (e.g. in *Internet Explorer*), it is recommend to enable support for SSL 3.0 and TLS 1.0 versions.

## 1.2 Authentication to Kerio WebMail

To access the *Kerio WebMail* interface service using a web browser, insert the IP address (or the name if it is contained in DNS) of the computer where *Kerio Connect* is running. A protocol has to be specified in the URL — either HTTP for non-secured access or HTTPS for SSL-encrypted access. The URL can have the following form: `http://192.168.1.1` or `https://mail.company.com`.

It is recommended to use the HTTPS protocol for remote access to the service (simple HTTP can be tapped and the user login data can be misused). By default, the HTTP and HTTPS services use the standard ports (80 and 443). If the standard ports are changed, specify the port number in the URL address, like `http://192.168.1.1:8000` or `https://mail.company.com:8080`.

*Note:*
The description above focuses accessing email via mobile devices. If it is not possible to connect to *Kerio Connect*, insert URL following one of these formats: `http://server_name/pda` or `http://ip_address/pda`.

If the URL has been entered correctly, a login page will be displayed in the browser. Enter the username and password on this page (if the user does not belong to the primary domain, a complete email address is required).

**Figure 1.1** Login page

### *Full and simplified interface*

After the username and password has been entered, users can decide whether to use the full version of *Kerio WebMail* or the simplified version *Kerio WebMail Mini* will be used:

The full version of *Kerio WebMail* is recommended for users with fast internet connection who require high performance and functionality. The capabilities of the full version include:

- email folders management,
- calendars management,
- contacts management,
- tasks management,
- notes management,
- viewing of public email folders and contact, calendar, tasks and note folders,

- folder management (creating, removing, moving, sharing and subscriptions),
- user's settings of the interface.

*Kerio WebMail Mini* is optimized for slower internet connection types, for all browser types as well as for mobile devices. The capabilities of the simplified version include:

- email folders management,
- contacts management,
- viewing of email and contact public folders,
- folder management (creating, removing, moving, sharing and subscriptions),
- user's settings of the interface.

In detail, *Kerio WebMail Mini* is described in chapter 2.

### Connection from Windows Internet Explorer 7.0

*Windows Internet Explorer 7.0* requires the new browser settings before the first connection to the *Kerio WebMail* interface. The change to be done addresses configuration of security areas. Brief help guidelines are available through the *Recommended browser settings* link available on the *Kerio WebMail's* login page. If you miss the link, the helplines are as follows:

1. Click on *Tools* → *Internet Options* and select the *Security* tab (see figure 1.2).

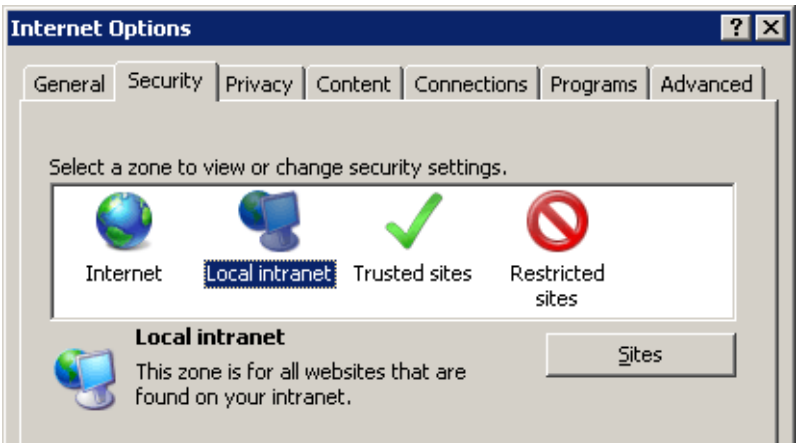


**Figure 1.2** Internet Options → the Security tab

2. On the *Security* tab, click on *Local intranet* and then use the *Sites* button.

3. In the *Local intranet* dialog just opened, click on *Advanced* (see figure 1.3).

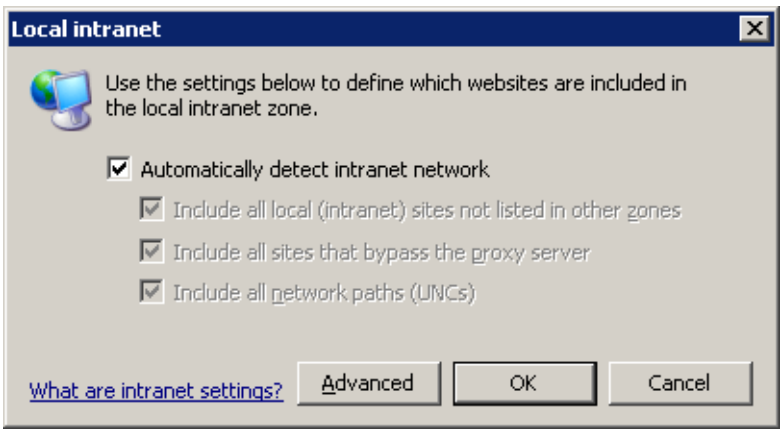


**Figure 1.3** The Local intranet dialog

4. In the *Add this Web site to the zone* textfield, specify *Kerio Connect's* URL address (e.g. `http://mail.company.com` or `https://mail.company.com`, see figure 1.4).

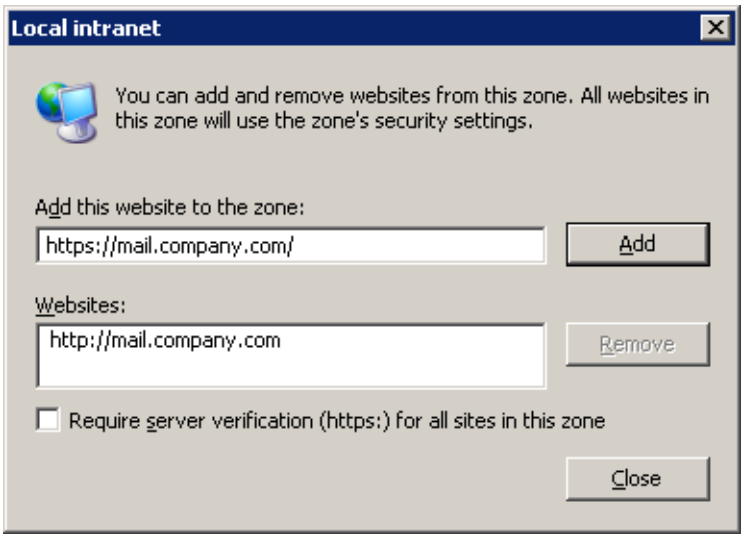


**Figure 1.4** URL addresses can be specified in the Local intranet dialog

This setting removes the address line displayed in header of every *Windows Internet Explorer 7* window.

### *Log out*

Users should always log out when they finish working in *Kerio WebMail*. To log out, use the *Logout* link in the upper right corner of the window. After logout, users get immediately disconnected from *Kerio Connect*, which prevents misuse of such connection.

*Note:*
By disconnection, all windows associated with *Kerio Connect* are closed.

## 1.3 Integration with Windows/Mac OS X/Linux

*Integration with Windows/Mac OS X/Linux* is a handy tool that helps use *Kerio Connect* and its features even more effectively and in a more comfortable way. It is a web page where you can find for example:

- *Kerio Outlook Connector* download link,
- the script for automatic creation of profiles in *MS Outlook* extended with the *Kerio Outlook Connector*,
- URL address of your *Calendar* personal folder (it can be used for subscription of the calendar in another calendar supporting application),
- a link for download of the certificate for mobile devices,
- a link for download of the *Apple Address Book* autoconfig file (for *Mac OS X 10.6 Snow Leopard* and higher).
- a link for download of the *Microsoft Outlook for Mac* autoconfig file (for *Mac OS X 10.5.8 and higher*).

The content of the page depends on the operating system from which it is accessed. Apart from the operating system, it depends also on other circumstances, such as the fact that the page is opened in a mobile device's browser or that HTTP or HTTPS protocol is being used.

One of the options how the page can be opened is starting it from the *Kerio WebMail's* login page (see figure 1.1).

Another option to open the *Integration with Windows/Mac OS X/Linux* is to log in *Kerio WebMail* and go to *Settings* → *Integration with Windows/Mac OS X/Linux*. This method is also more comfortable, because once you connect to the server you do not have to authenticate again.

## 1.4 The Kerio WebMail environment

Once you are successfully connected to *Kerio WebMail*, a special user interface resembling of usual email clients is opened in the browser (see figure 1.5). Basically, *Kerio WebMail* consists of three functional parts:

- hierarchically sorted folder tree,
- the main pane with content of the selected folder,
- toolbar (depending on folder type),

This section addresses main *Kerio WebMail* components:

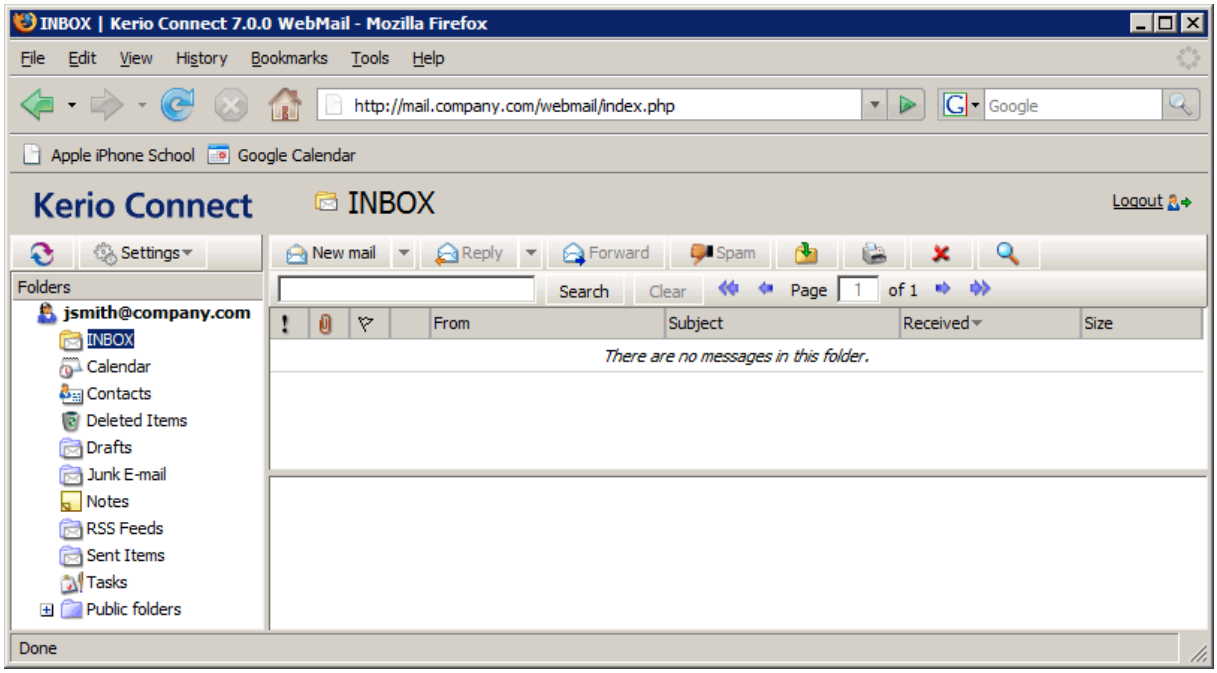


**Figure 1.5** The first connection to Kerio WebMail

### 1.4.1 Folder tree

The left pane of the *Kerio WebMail* window provides the folder tree. The tree includes all folders of the mailbox. Clicking on any folder displays its contents in the main pane (message list, calendar, etc.).

The folder tree allows manipulation with individual folders. This means that folders can be moved, renamed, created and removed here. Folders and possible options are focused in chapter 1.12.

In addition to the basic operations, in the folder tree it is also possible to add or remove access rights to users as well as subscribe folders of other users. Sharing and subscription of folders is addressed in section 1.12.5.

### 1.4.2 The main pane

The main pane of *Kerio WebMail* displays contents of a folder currently selected in the folder tree. To view content of the folder in the main pane, click on the particular folder in the tree. The way of display in the main pane depends on folder type. *Kerio WebMail* supports viewing of the following folder types:

- Email

  In case of email folders, the main pane consists of three sections. These include a list of messages, a special reading pane where the message body is displayed and a toolbar where several email tools can be found (see figure 1.6).

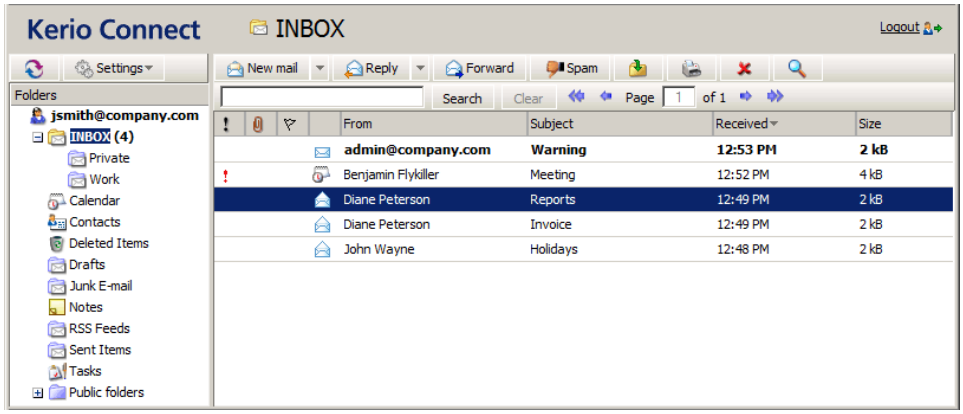


**Figure 1.6** Email

Email folders and their manipulation are addressed in chapter 1.6.

- Calendar

  The layout of the calendar's main pane depends on view mode. The figure 1.7 show the calender in a week view. Beside this mode, day and month views are available, as well as two types of lists, distinguishing events with and without recurrence.

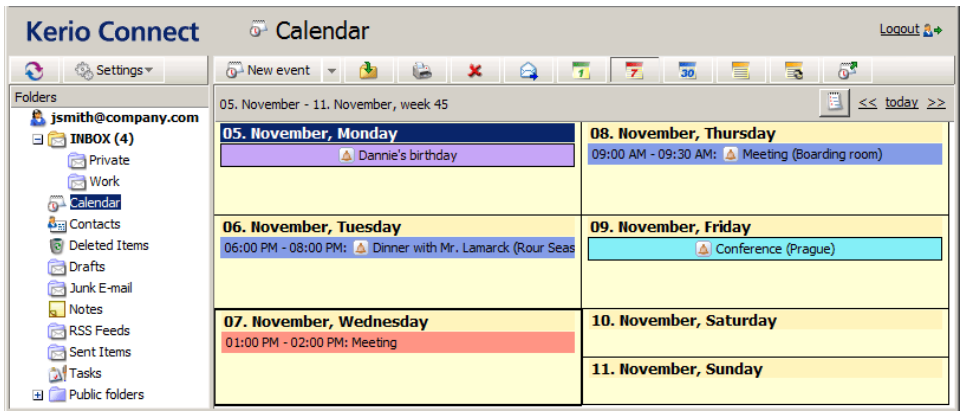


**Figure 1.7** Calendar

For detailed information on calendars, see chapter 1.8.

- Contacts

  Like calendars, contact folders also allow various view modes. The modes available for calendars are either address cards or a list of contacts (at figure 1.8, the address cards mode is shown).

  For detailed information on contacts and their management, see chapter 1.7.

- Tasks

  In case of tasks, the main pane provides a list of created tasks and a toolbar allowing comfortable administration of tasks (see figure 1.9).

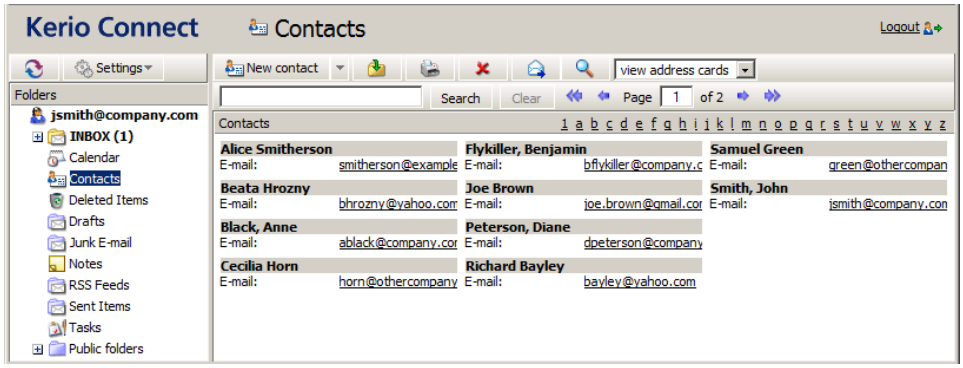


**Figure 1.8** Contacts

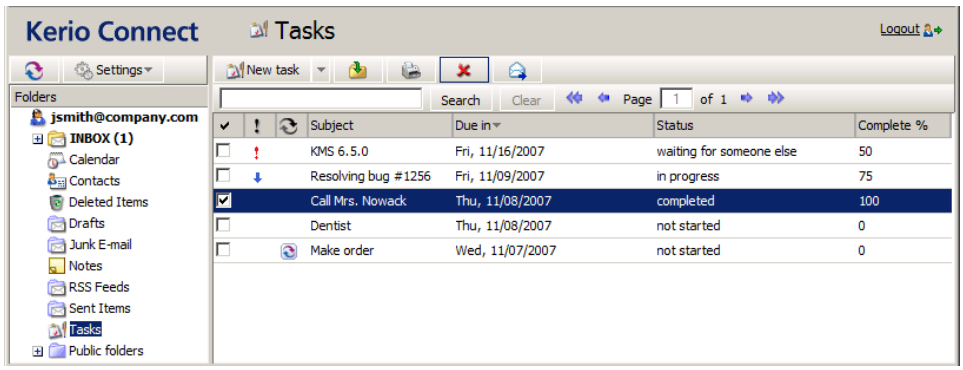


**Figure 1.9** Tasks

For detailed information on tasks, see chapter 1.10.

- Notes

  The main pane of the *Notes* folder provides a list of notes (see figure 1.10). The notes use customizable colors to distinguish various topics. The main pane also includes a toolbar allowing creation of new notes, their removal, printing, etc.

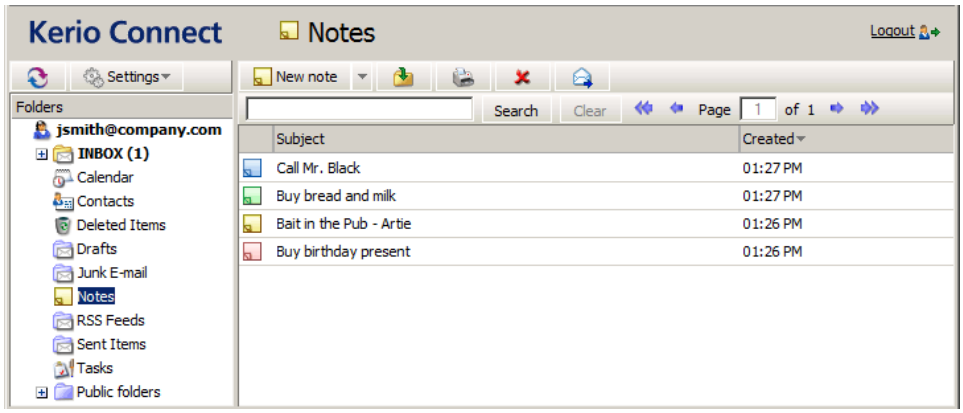


**Figure 1.10** Notes

For detailed information on notes, see chapter 1.11.

### 1.4.3 Today page

The "Today" page provides overview of the current status of the mailbox. It shows current number of unread messages in Inbox (*Settings* allow to add more folders for which this information will be shown) as well as tasks and events for the current day. It also includes a quota for disk space reserved for the particular mailbox (if the quota has been set by the server administrator). This section also provides information about current free and occupied space in the mailbox so the user can always easily recognize how much of the mailbox is currently available.

To open the "Today" page, click on the root folder (at figure 1.11, the root folder is `wsmith@company.com`).

In the user interface it is possible to set the "Today" page as an introductory page that would be displayed upon each connection to *Kerio WebMail* (for details on these settings, see chapter 1.13.1). Thus the users can see right at the start what should be done on that day and they do not have to surf through individual folders. Individual items at the "Today" page are formatted as links which can be simply clicked to view the particular event, task or email folder.

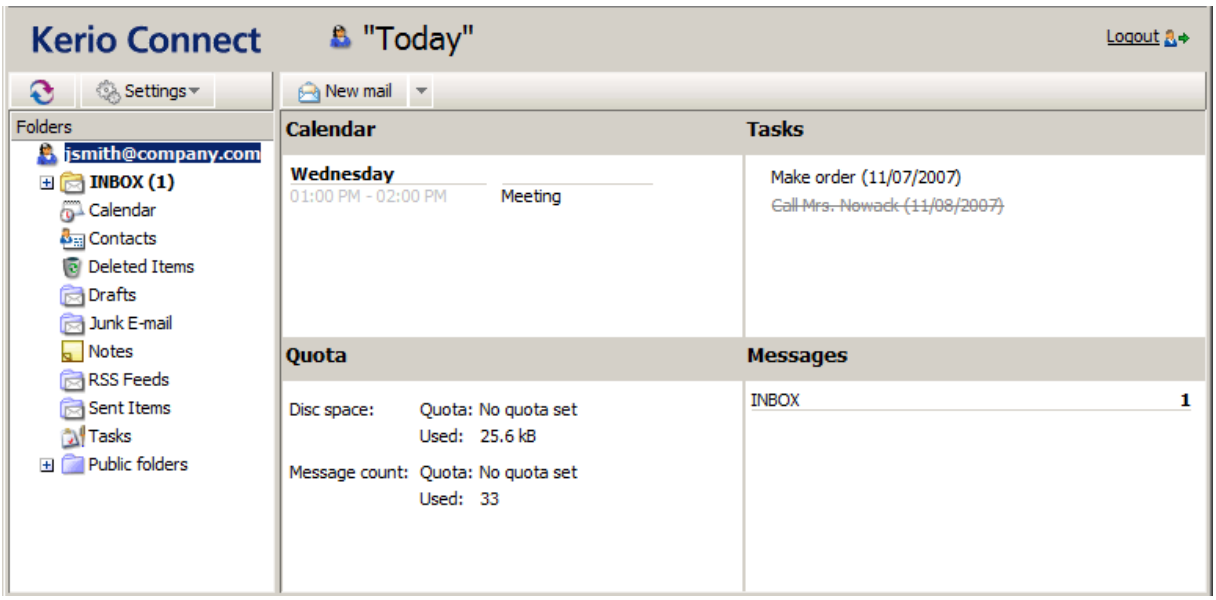


**Figure 1.11** Today page

The "Today" page is divided into four parts. The information in individual sections vary (events, tasks, quota and number of unread messages):

- *Calendar* — this section includes a list of events scheduled for the current day. In *Kerio WebMail's* user settings, up to seven days may be set to be displayed at the

"Today" page. For details on where and how number of days to be displayed can be set, see chapter 1.13.1.

- *Tasks* — by default, this section shows a list of tasks set for the current day. However, in the user interface it is possible to change the "Today" page settings so that all tasks included in the particular folder are always displayed. The settings are addressed in chapter 1.13.1.

  To make manipulation with tasks even more comfortable, various types of information are also displayed, such as priority (an exclamation mark or a blue arrow), information on uncompleted tasks where the due date has already expired (items marked red), etc. These attributes are shown at figure 1.11.

- *Quota* — server administrators can set a so-called quota and apply it to particular mailboxes. The quota is a limit for number of messages and for diskspace reserved for the mailbox. The *Quota* section informs users if quota is set and how much of the reserved mailbox capacity is left. When the mailbox is full, the server generates an automatic message recommending to remove some messages in the mailbox and sends it to the corresponding user. If the user ignores this warning, other mail will not be delivered to the mailbox since no more capacity is left.

- *Messages* — by default, this section shows all unread email in *Inbox*. In the *Kerio WebMail* user settings, it is possible to allow also displaying of other email folders. Details on where and how these settings can be done are addressed in chapter 1.13.1.

### 1.4.4 The Kerio WebMail pop-up menu

The *Kerio WebMail's* pop-up context menu, opened by right-clicking on an object (folder, message, note, etc.), provides a list of actions. The pop-up menu is always associated with a particular object. This implies that right-clicking on an email message opens a menu (this menu is shown at figure 1.12) which includes options different from the options included the pop-up menu associated with the *Tasks* folder (opened by right-clicking on *Tasks* in the folder tree).

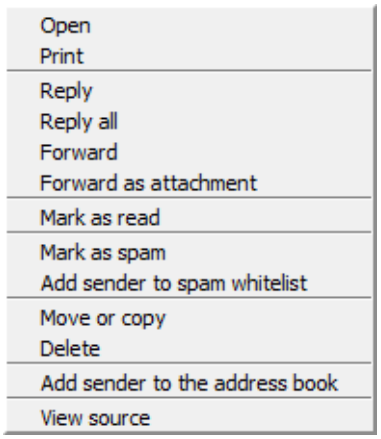


**Figure 1.12** Context menu for email

The *Kerio WebMail's* pop-up context menu generally includes the same items as found on toolbars of individual folders.

*Note:*

- If a new contact, event, task or another item is created through the pop-up context menu (see figure 1.13), these items are added automatically in the default folders (Contacts, Calendar, Tasks). Default folders are folders included in *Kerio WebMail* by the moment where the particular account is created (such as *Inbox*) and they cannot be removed.
- On *Apple Macintosh* computers, click the mouse button and hold the *Ctrl* key to simulate the right mouse button behavior. On the standard two-button mouse, the right mouse button shows the context menu.

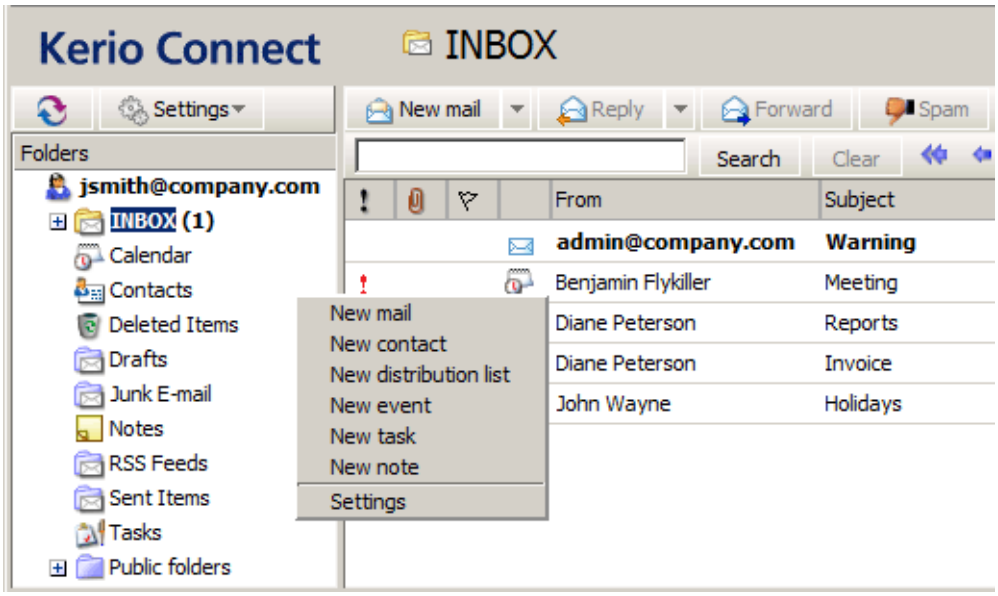


**Figure 1.13** The pop-up menu for creation of a new item (message, contact, event, etc.)

### 1.4.5 Moving and copying items

*Kerio WebMail* allows moving and copying of items between folders. Variety of methods can be used for this purpose and it depends on the user's choice which one they feel more comfortable with. The methods are described in the following section:

#### *The Drag & Drop method*

The Drag & Drop method is a simple system tool to move and copy an item by using the left mouse button:

1. Put the mouse pointer over the item to be moved. Hold the left mouse button and drag the item over the destination folder. Release the mouse button.

*Note:*
To copy the selected item(s), hold the `Ctrl` key (or `Alt` on Mac OS X).

2. Hold down the mouse button (and the `Ctrl` key, when copying) and drag the item to another folder.

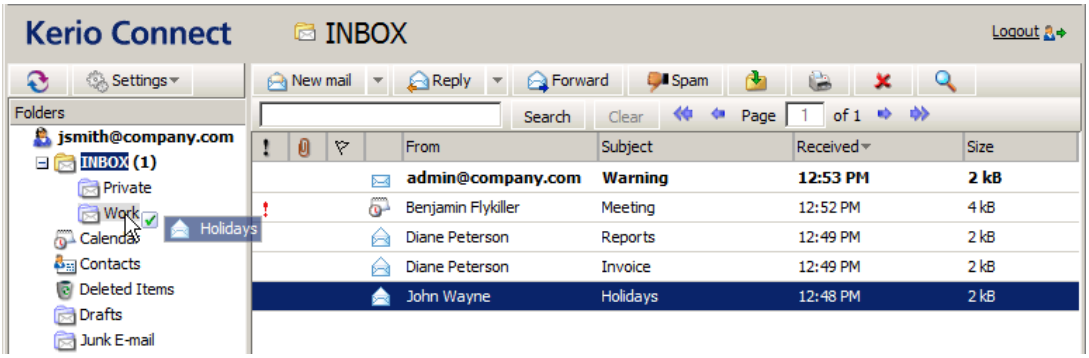


**Figure 1.14** Moving items by the Drag & Drop method

3. A green tick icon appears when the item is ready to move (see figure 1.14) or a blue + icon when ready for copying (see figure 1.15).

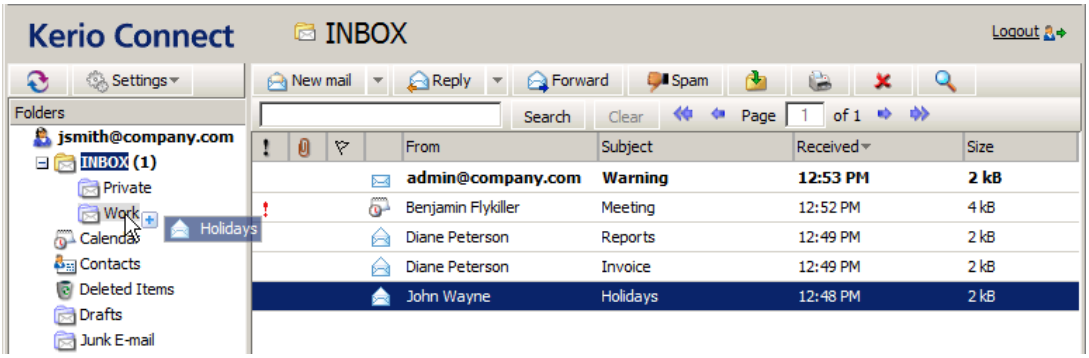


**Figure 1.15** Copying items by the Drag & Drop method

4. Let hold of the button to move the item to the selected folder immediately.

*Note:*
Unless the item is dragged over a folder where it can be moved (i.e. any mail folder with corresponding access rights in the folder tree), a red icon is displayed meaning it is impossible to move the item to the particular location.

### *Using the Move or copy button*

The toolbar includes a clickable *Move or copy* icon. Items can be move or copied by using this button as described below:

1. Highlight the selected item and use the *Move or copy* button in the toolbar.

2. In the *Folder selection* dialog just opened, select the folder where you want to move or copy the item and click on *Move* or *Copy*.

#### Pop-up menu

Items can be moved or copied also by a special option in the pop-up menu:

1. Right-click on an item. to open a context pop-up menu and select *Move or copy*.
2. This opens the *Folder selection* dialog where you can select a folder where the item will be move or copied. Click on *Move/Copy*.

## 1.5 Specific features and technical limitations

#### Automatic logout

For security reasons, *Kerio WebMail* logs out users automatically after a preset idleness timeout or after the timeout set for the maximal length of connection to the *Kerio WebMail* interface. By default, the length of inactivity period is set to 2 hours. By default, the maximal length of connection to the *Kerio WebMail* interface is set for 312 hours. *Kerio Connect* administrators can change this value.

When any of these timeout expires, clicking on any link or button returns the user to the login page and the user has to log in again.

#### Pop-up killers

If any pop-up blocker (pop-up killer) is installed on the computer where *Kerio WebMail* is running, it is necessary to create an exceptional rule in *Kerio WebMail* or to connect via secure connections (see chapter 1.2). Otherwise, event and task reminders will not work in *Kerio WebMail*.

If the pop-up blocker is embedded in the web browser, create an exception for *Kerio WebMail* or disable the pop-up blocker completely.

#### Message size limits

Size of any outgoing email message (event, task or contact) must not exceed the limit set by *Kerio Connect* administrator (for detailed information, see the *Kerio Connect* administrator's guide). Otherwise, the particular message will not be delivered. No limit applies to incoming mail.

#### Duplication of default folders

After certain period of using, some default folders, such as *Deleted items*, *Junk email*, etc., may be duplicated in the *Kerio WebMail's* folder tree.

This problem occurs under the following circumstances:

- besides *Kerio WebMail*, a user connects to his/her mailbox also via an email client which is not directly supported by *Kerio Connect* (e.g. *MS Outlook Express*),
- this unsupported email client is not in English,
- client applications connects to the server via IMAP.

If the conditions described above are met, the mail client might create its own set of special folders (they cannot be found at the server since their names are in English there). These changes are copied by *Kerio WebMail*.

In *MS Outlook Express*, the problem can be removed by renaming the critical folders (*Sent Items* and *Drafts*) under *Tools* → *Accounts*:

1. Click on the particular email account and click *Properties*.
2. Select the bottom IMAP folder and change the *Sent Items* and *Drafts* folder names (for details, see figure 1.16).

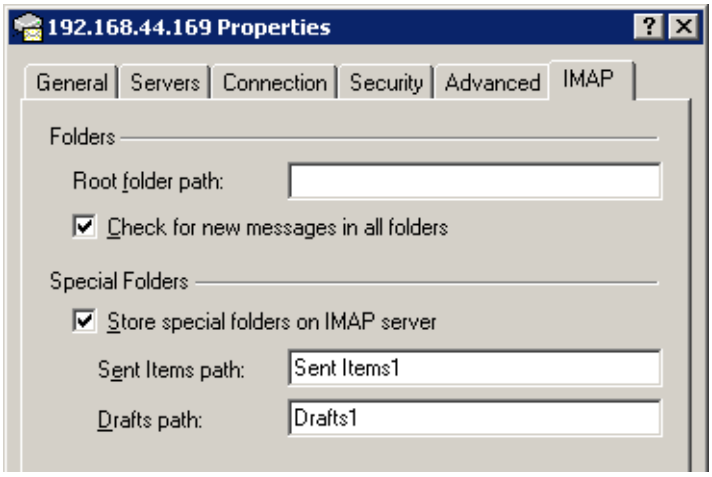


**Figure 1.16** Renaming folder names in MS Outlook Express

### *Messages signed in MS Outlook*

Senders who use *MS Outlook* with the *Kerio Outlook Connector* (however, this problem can arise even if some obsolete email clients are used) can send digitally signed messages in a format that is not supported by *Kerio WebMail*. This problem can be solved by allowing sending of digitally-signed email messages in *MS Outlook* as clear text messages.

If your messages are digitally signed, in *MS Outlook* check the *Send clear text signed message when sending signed messages* option under *Tools* → *Options* on the *Security* tab (see figure 1.17). This option provides that also *Kerio WebMail* users may read the message.

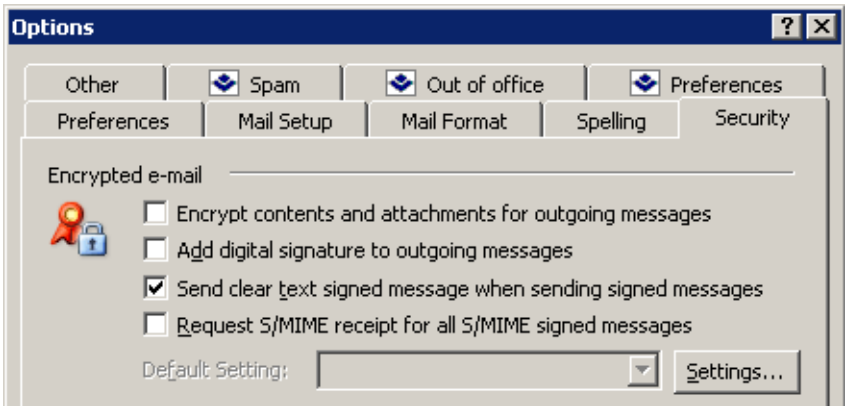


**Figure 1.17** Setting verification of digitally signed messages in MS Outlook

*Note:*
The settings shown here applies to *MS Outlook 2003*. For other versions of *MS Outlook*, the settings may differ slightly. In *MS Outlook 2007*, this setting can be found under *Tools* → *Trust Center* → *E-mail Security*.

#### *Problems with Back and Forward buttons*

Also note that the *Back* and *Forward* buttons located in the toolbar of the web browser will not work properly in *Kerio WebMail*. Therefore, it is recommended not to use these buttons in *Kerio WebMail*.

## 1.6 Email

This chapter will provide you with an overview of options and features of mail folders, i.e. folders where email messages are kept. Number of email folders in a mailbox is not limited.

The most essential folder is *Inbox*. By default, new messages are delivered to this folder. It is also possible to make the server deliver messages sorted by certain criteria to other folders, however, this issue will be addressed in chapter 1.14.

Another basic email folder is *Sent Items*. Here, copies of all messages sent from the mailbox are stored.

Another email folder to be mentioned is *Drafts*. This folder stores any messages which have been started or even completed but not sent.

The three basic folders described above cannot be removed as they belong to so-called default folders. Details on default folders as well as on other folder types are focused in chapter 1.12.

### 1.6.1 Message list

In this section, you will be provided with information on basic structure of email folders. The mail folders are arranged in a table (list). Each row contains one message and available information. Information to selected messages are listed in the columns. Each line may include icons referring to other features of the particular message (the description provided below addresses them in the order from left as they may appear in the line):

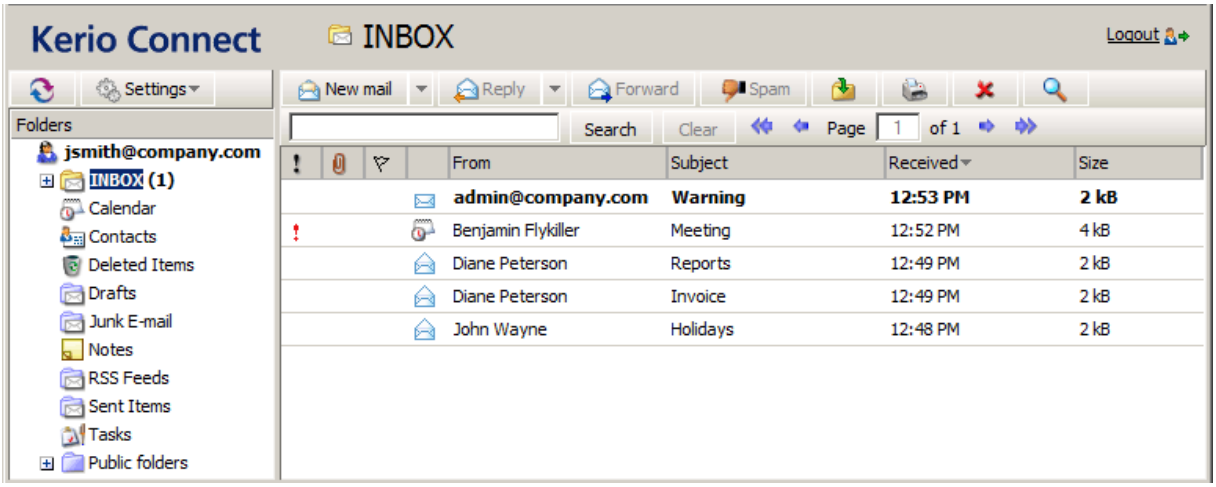


**Figure 1.18** The Inbox email folder

- *Priority* — this icon represents the importance of the message. High priority is marked by a red exclamation mark, whereas a blue downward arrow stands for a low priority message. Priority is set by the message sender (see section 1.6.3).
- *Attachment* — the paperclip icon indicates that the message contains an attachment (i.e. an attached file).
- *Flag* — flags are represented by a little red flag icon used to highlight messages (so it is later easier to find them).
- *Icon* — these icons indicate different types of messages (forwarded message, spam, invitation, etc.).
- *From* — the address of the sender.
- *Subject* — the subject of the message.
- *To* — the address(es) of the recipient(s).
- *Cc* — the address(es) of the copy recipients.
- *Received* — the date/time when the message was received. On the day of receipt, this column shows only the time data; from the next day on, the date is displayed as well.
- *Date* — the day when the message was sent. If the message is received on the same day, only time data are shown. From the next day on, the date is displayed as well.
- *Size* — the size of the message in kilobytes.

By default, up to 20 messages are listed on one page. To change number of messages displayed on a single page, use the *Settings* section in *Kerio WebMail* (see chapter 1.13.1).

| icon | Description |
|---|---|
|  | high priority messages |
|  | low priority messages |
| | attachment |
|  | message flag |
|  | unread message |
|  | read message |
|  | unread spam |
|  | read spam |
|  | messages already replied |
|  | forwarded messages |
|  | event (meeting invitation or a reply to an invitation) |
|  | task (notice informing of the user's participation on a task or a reply to such a notice) |

**Table 1.1** Overview of icons used in message lists

### 1.6.2 Message reading

New messages are delivered to the *Inbox* folder by default (folders for incoming messages can be specified in the rules— see chapter 1.14). The unread messages are marked in bold. The number of unread messages is indicated in parentheses next to the folder name. Double-click selected message to open it in a new window (or select a message in the list and press *Enter*).

The reading pane is an area where the message body is displayed (message body, images, etc.). It can be located in the upper or lower part of the window (down, on the right see figures 1.19 and 1.20) or hidden. If the window is hidden, message contents are displayed in separate windows. The reading pane can be enabled or disabled in *Settings*. User settings are described in detail in chapter 1.13.1.

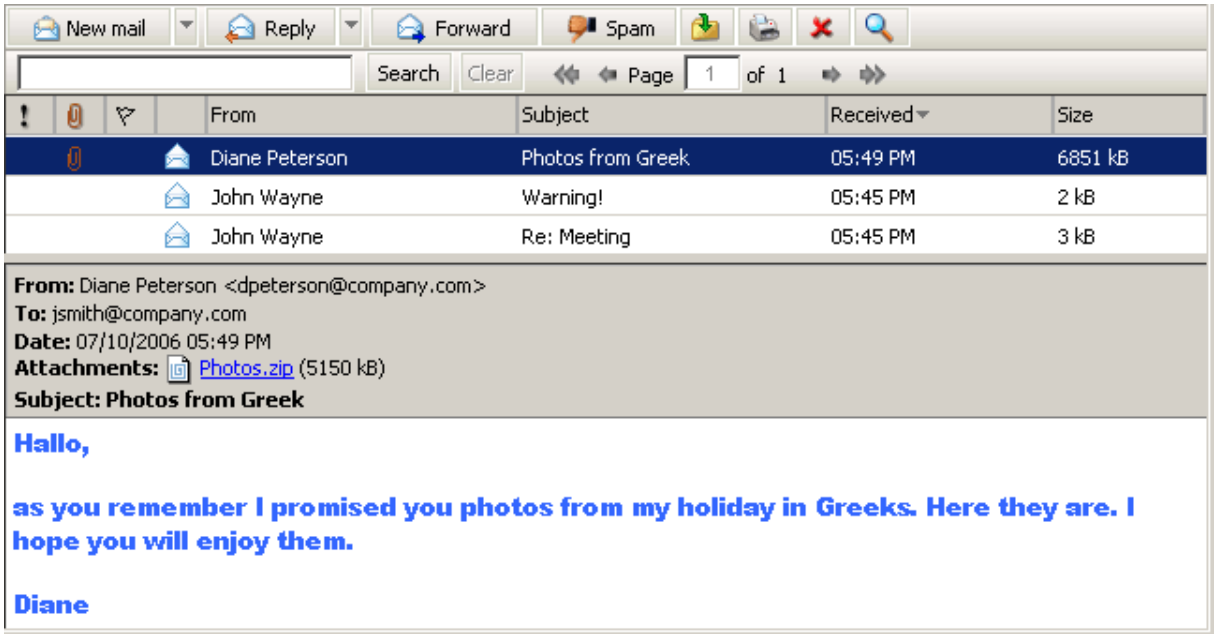


**Figure 1.19** Message reading

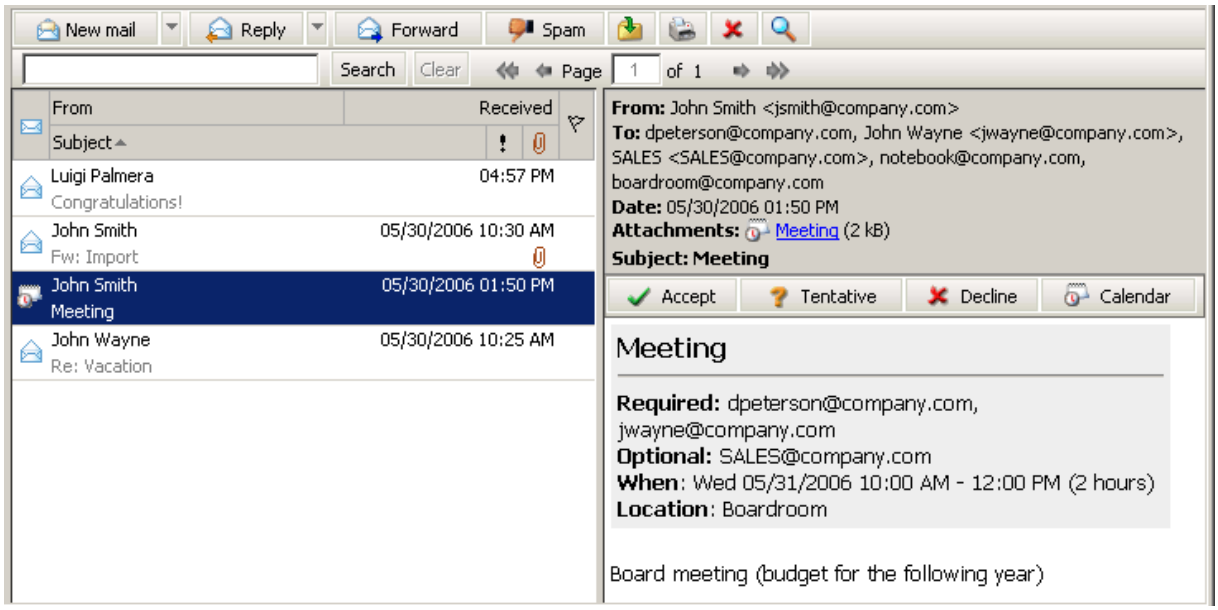


**Figure 1.20** The reading pane is located on the right from the list of messages

### *Message list editing*

- *Adding and deleting columns*

  The appearance of the message table can be changed depending on the information shown. *Kerio WebMail* enables users to display or hide any of the columns. Columns can be set as follows:

1. Right-click on the column captions.
2. The pop-up menu that appears contains the *Change columns* option.
3. Click on *Change columns* to open the *Select fields* dialog box and select columns to be shown in the list of messages.

Users can select (check) the columns they want to include in the table. Checked columns will be displayed in the table, unchecked columns will be hidden.

- *Sorting messages by columns*

  The detailed information on individual messages is displayed in the columns. Each column enables sorting messages by information. Click the column heading to sort tasks in the ascending or descending order (see the arrow next to the column name) by alphabet, numbers or time (depending on the column contents).

  *Note:*
  For sorting by subject or by sender, items are sorted by the alphabet of the language set in *Settings* as preferred (the *General* tab) in *Kerio WebMail* — see chapter 1.13.1. In result, if for example English is set as preferred and subjects are in German, subjects will be ordered by English alphabet and some specific national characters may also cause problems in sorting.

- *Adjusting the column width*

  The width of the message table can be adjusted the same way as in the spreadsheet programs. To change the column width, click between two columns in the table header and drag the cursor right or left as needed (see figure 1.21).

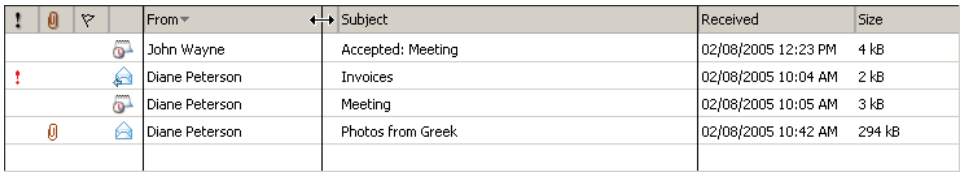


**Figure 1.21** Adjusting the column width

*Note:*
Settings of column width is not remembered. Next time opened, the columns return to their default state.

### Attachments

Each incoming message may include one or more attachments. The attachments are files of various types (text, images, audio, video, archived compressed folders, etc.), that can be attached to a message and sent to the recipient.

If you receive an attachment in a message, you can open it, view it and also save it to a folder (by using the pop-up menu opened by right-clicking on the attachment). This opens a standard

dialog where the attachment can be saved. Users can also use the pop-up menu of the link (the *Save as* option).

### Reply to a message

It is possible to reply directly to any message. This can be done by the *Reply* button available on the toolbar (see figure 1.22). The button includes a menu where it is possible to select from two options (*Reply* to send the reply only to the sender or *Reply All* to send the reply to all addresses included in the original message). Click on one of these buttons to compose the reply message. The email address of the person who has sent the original message is entered automatically in the *To* field. Note also that the subject of the message now contains the `Re` string. This string indicates reply to previous message.

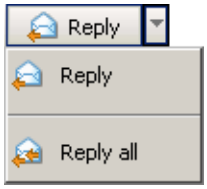


**Figure 1.22** The Reply button menu

The message can be also forwarded to other recipients. Click on *Forward* to edit the selected message where the *To* and *Cc* fields are left blank, because the system does not know who do you intend to forward the message to.

If you receive a message with the `Fw:` string prefixing the subject, you'll know that it is a forwarded message (. `Fw: detailed information regarding the today's meeting`).

### Message flag

Each of the received messages can be marked by a flag in *Kerio WebMail*. It is a little colored flag symbol that reminds users of the message it was appended to. Flags help us look up messages easily.

Click the column with the flag image to add a flag to/from a message (see image 1.23). The same method can be followed to remove a flag. Simply click on the flag you wish to remove.

| ! | | | | From | Subject | Received | Size |
|---|---|---|---|---|---|---|---|
| | 📎 | | ✉ | **Diane Peterson** | **Photos** | **12:13 PM** | **293 kB** |
| ! | | 🚩 | ✉ | admin@company.com | Warning | 12:12 PM | 2 kB |
| | | | ✉ | John Wayne | Re: Meeting | 12:11 PM | 3 kB |

**Figure 1.23** Message list

*Note:*
Image flags can be added to messages even in *MS Outlook*. The flags appended to messages in this application will be displayed also in *Kerio WebMail* and vice versa. The problem is, that *MS Outlook* enables users to add flags of different colors. *Kerio WebMail* shows all flags in one color.

### 1.6.3 Message writing

In *Kerio WebMail*, new messages can be composed in the special window designed for message editing. To open this window, use the *New mail* button on the toolbar.

The window for creating new messages is divided into several sections. The first one allows editing of addressees and message subject (name). This part is called message header. The second section allows insertion of the message. This part is called body. Another section is the toolbar in the upper part of the window. Several functions are included that can be used to manipulate with the current message.

#### *E-mail header*

The message header (see figure 1.24) provides the following options:

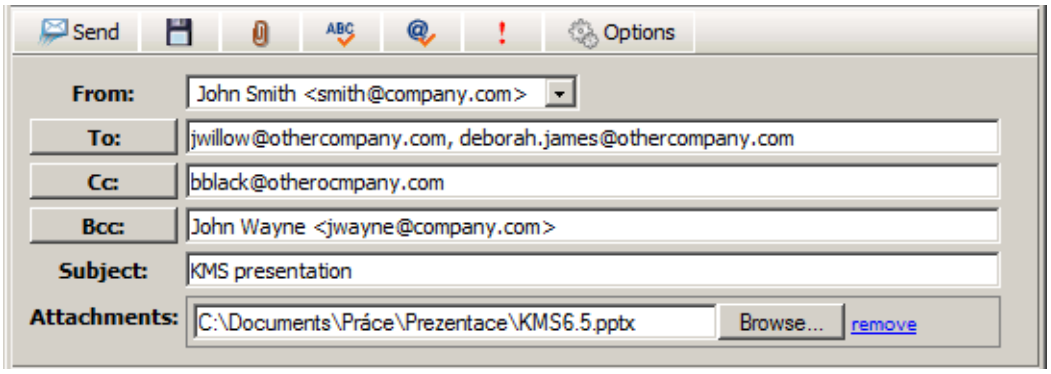


**Figure 1.24** E-mail header

**From**

This item is displayed only if you use an address different from the default email address (setting of default user address is described in section 1.13.1).
The selected address will be treated as sender address.

**To**

Enter the email address of the recipient in this field. More than one email address is allowed; the addresses must be separated by commas (see picture 1.24).

**Cc**

The same function as the *To* field. However, this item is used in special cases where the message includes multiple addressee, some of them only being informed of the issue by the message. The addressees included in this section are not expected to reply to the message.

**Bcc**

The address entered in this field is hidden for the other recipients. Blind copy is useful especially when a message is to be sent to more email addresses and you want to protect the privacy of one or more users.

**Subject**

The subject stands for the message's name. It should provide clear hint on the message content (helpful for later reference).

Next to the fields for recipients' addresses, the *To*, *Cc* and *Bcc* buttons are available (see figure 1.24). These buttons open the search dialog (see figure 1.25) where first and last names can be used to easily filter out particular email address to which the message would be sent. The look-up dialog scans only through the addresses included in the account's contact folders.

Below, you can find detailed description of the look-up feature:

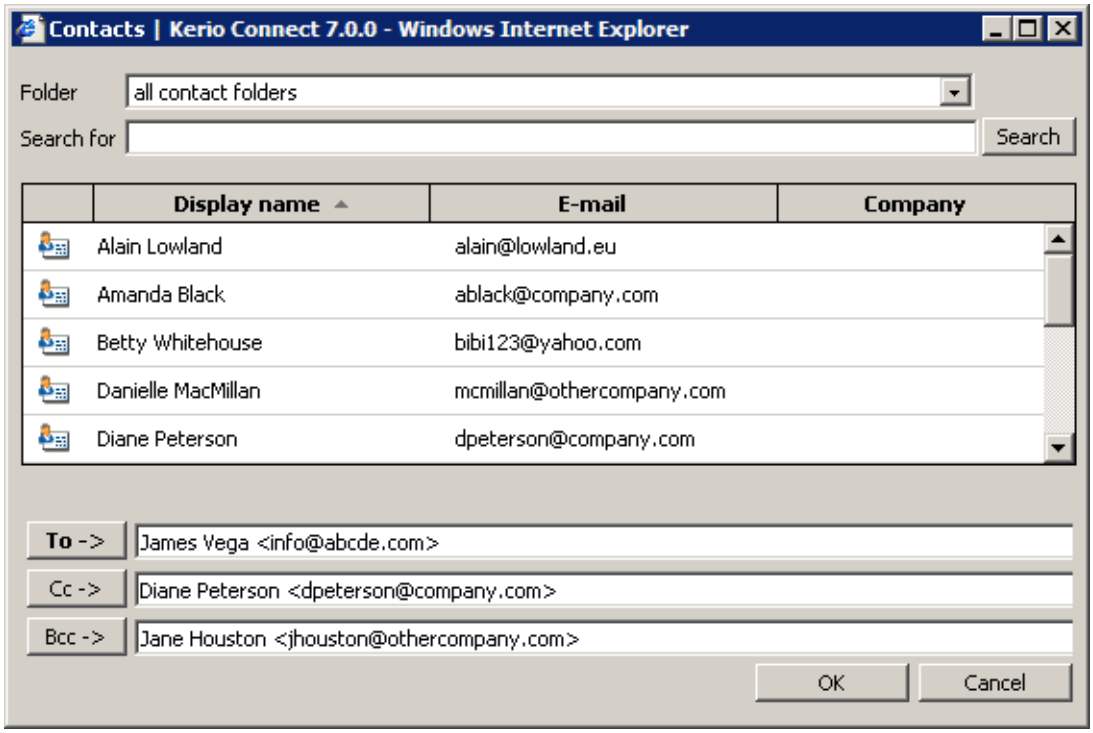


**Figure 1.25** Searching in contacts

**Folder**

The addresses of recipients can be selected from the personal address book or from other contact folders that the user has connected to. In menu, select folders where the search will be performed.

**Search for:**

Enter at least the first letters of the searched contact (first name, last name or a part of email address) which will be used as a searching criteria string.

*Note:*
The look-up is not case-sensitive.

Click the *Search* button to start searching using the parameters previously defined.

### *Toolbar*

The toolbar includes several buttons allowing basic operations such as message sending or saving:

**Send**
The message will be sent to the addresses entered into the *To*, *Cc* and *Bcc* fields.

**Save as Draft**
The message will be saved to the *Drafts* folder, where it can be opened, edited and sent.

**Attach**
Use this button to attach a file to a message. More than one file can be attached to the message. Press the *Attach more* button multiple times and select the files you want to attach to the message.
If an undesirable file has been attached to the message by mistake, remove it by clicking on the *Remove* link next to the attachment.

> ***Warning:***
> Each attachment appended must not exceed the limit set by the administrator in *Kerio Connect*. Otherwise, the particular message will not be delivered.

**Spelling**
Use the *Spelling* button to perform a spellcheck of the written text (for more information on spellchecker, see section 1.6.4).

**Check**
The *Check for names* button completes addresses by using connected contact folders. By default, the default personal contact folder is set for checking for names. In addition, other contact folders can be added in *Settings* (for details, see section 1.6.6). As well as the *Check for names* button, the `Ctrl+K` shortcut can be used for the same purpose (see section 1.6.6).

**Priority**
Press the exclamation mark icon to send the message with high priority.

**Options**
The *Options* button opens a dialog box where some of the message parameters can be set, e.g. its priority or delivery confirmation request.

- *Message format* — messages can be sent either as plain text or in HTML format. Users cannot use formatting in the plain text message and the formatting toolbar is disabled.

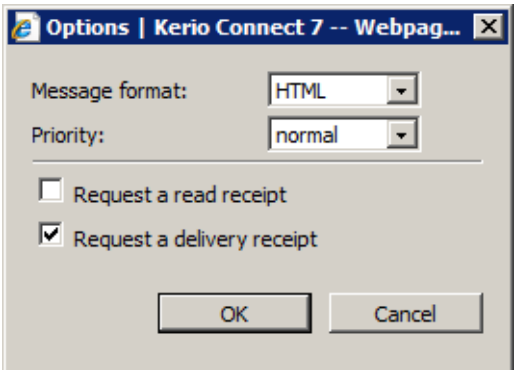


**Figure 1.26** New mail options

These settings apply only to a single message. General settings can be defined in *Settings* (chapter 1.13.1).

- *Priority* — priority of a message. The priority is indicated by an exclamation mark or an arrow.
- *Request aread receipt* — if this option is enabled, the recipient's client sends the sender an automatic alert that their message has already been read (if conformed by the reader). This option can be therefore used also in cases where an answer is not explicitly demanded but it is important to know whether the message has been read.
- *Request adelivery receipt* — check this option to request an automatic notification of the message's successful delivery. The notification does not provide the information of if the message has been read.

### *Message body*

The message body consists of the text and attachments (if any).

The message body can be sent as plain or formatted text. Text formatting is allowed thanks to an embedded HTML editor that supports text formatting functionality. However, writing of the email messages in this editor is not supported by some of the browsers:

- *Firefox* — HTML editor is functional, only some of the buttons are disabled (Cut, Copy and Paste icons). Users can use keyboard shortcuts instead of these buttons (chapter 1.13.5).

To format the message text in *Kerio WebMail*, use icons in the toolbar above the text field.

**Figure 1.27** Toolbar

### Edits

The dialog box contains standard Cut, Copy and Paste tools. It is possible to use standard key shortcuts (`Ctrl+C` for copying, `Ctrl+V` for pasting and `Ctrl+X` for cutting of the selected object) or the first three icons on the toolbar.
Besides the buttons, the Drag & Drop method can be applied when moving or copying text a message. Simply select part of the text and drag it to the desired position while holding the mouse button. Hold down the `Ctrl` key to copy the text.

### Font

The font can be changed the same way as in other editors. Users can select different fonts, sizes, colors and styles:

- *Fonts* — in *Kerio WebMail*, some basic fonts are available: *Arial (Black)*, *Courier*, *Times New Roman* and *Verdana*.
- *Font size* — click the appropriate icon in the toolbar to change the font size.
- *Font color* — click the appropriate icon in the toolbar to change the font color.
- *Font style* — standard icons for selecting a font style are available in the editor: *bold*, *italic*, *underlined*.
- *Remove formatting* — clicking on the icon removes all formatting from the selected text.

### Paragraph

The text paragraphs can be aligned right, left and centered, as well as indented from the left margin. Use the standard icons in the toolbars to change the appearance of the paragraph.

### Bullets and numbering

Standard icons for creating bullets and numbered lists are available in the toolbar. Click the selected text to enable the bullets/numbering. When users click the icon again, the bullets/numbering are disabled.

### Text highlighting

The selected text can be highlighted in one of the colors of the *Highlight* palette in the toolbar (the last item).

### Hypertext

A hyperlink is an active portion of a text, usually underlined and marked by a different color, that direct users to an intranet or Internet site. The hyperlink is used for directing to web pages, downloading files, sending email or accessing discussion groups.
Use the *Create link* icon in the toolbar to enter the URL for the hyperlink.

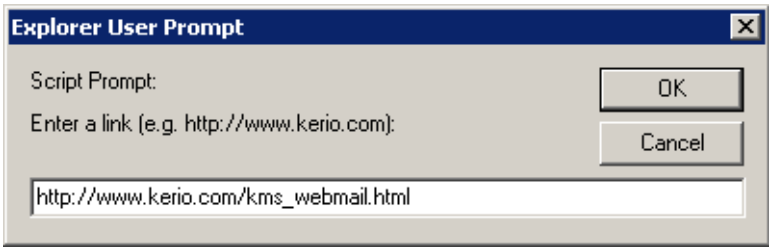


**Figure 1.28** Link

Use the *Remove link* icon to delete the hyperlink.
The following example illustrates how to use the hyperlinks:
One portion of the message text is: “I am sending you a link to aninteresting website”. The “interesting website” part can be used as a hyperlink.
Solution:
Mark the words “interesting website” by cursor and click the *Create link* button. A dialog box for creating a link appears. Specify the URL entry with corresponding URL address.

***Warning:***
If an email composition takes longer, connection between the server and the browser may be lost. If this happens, finish the message and enter your user password in the dialog which is opened upon attempting to *Send* or *Save* the message. Then the attempted action will be performed.

### *Moving message attachments by the Drag & Drop method in Firefox*

Firefox supports moving of attachments to the message editor’s window by the Drag & Drop method. The *dragdropupload* plugin is required for this action (available at https://addons.mozilla.org/firefox/2190/).

After installation, it is necessary to check whether the plug-in was installed successfully.

1. In the *Tools* menu, select *Extension*.

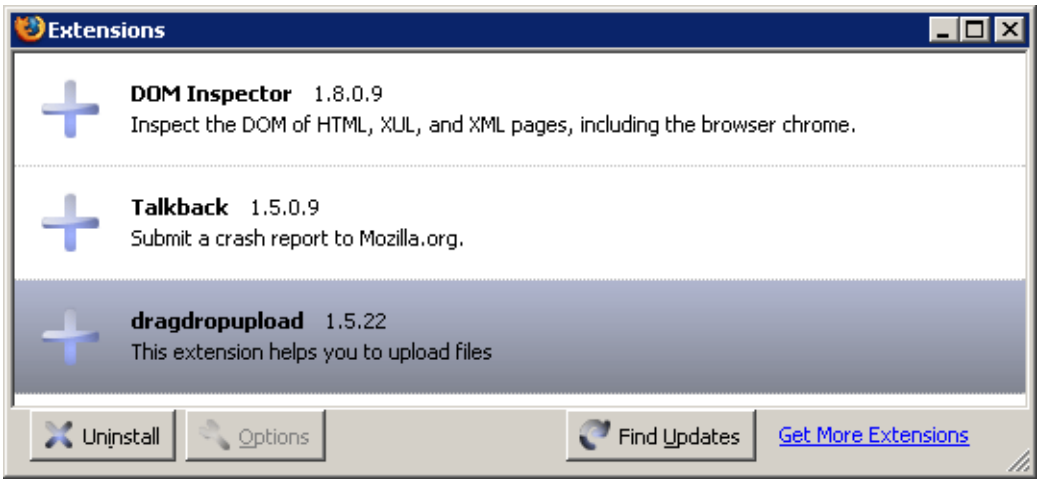


**Figure 1.29** The Extensions dialog

2. This opens the *Extensions* dialog. After successful installation, the dialog contains the *dragdropupload* plug-in (see figure 1.29).

The plug-in allows to attach one or more files to email messages by the Drag & Drop method in one of the following ways:

1. Open the message editor. To attach files to a message, left-click on them, hold the mouse button and drag them to the *Attachment* toolbar button. This adds the attachments to the message.

2. Open the message editor. Click on *Attachment*. This opens an empty entry for specification of the attachment path. Simply left-click on the files to be attached, drag them to the blank entry and release the mouse button. This attaches the files to the message.

### 1.6.4 Spellchecker

Use the *Spellcheck* button in the *New mail* toolbar to start the spellcheck. If an error is detected, a dialog is displayed with the incorrect phrase highlighted (see figure 1.30). The following options are available:

- Select a correct phrase in the *Suggestions* dialog box and click *OK* to confirm.
- Insert the correct phrase manually in the *Change to* dialog box and click *Change* to confirm.
- If the phrase was entered correctly, click *Skip* to skip the phrase.
- Use the *Skip all* button, if the phrase appears frequently in the text. All occurrences of the phrase in the text will be skipped.
- Click *Add* to add the phrase in the dictionary. New phrases can be also added using a special dialog box created for this purpose — see below.
- Click *Delete* to delete the phrase.

In order for the dictionary to work properly, select the correct dictionary for the written text. Users can use either the *Dictionary* menu (the last item in the dialog) or *Settings* menu (chapter 1.13.1).

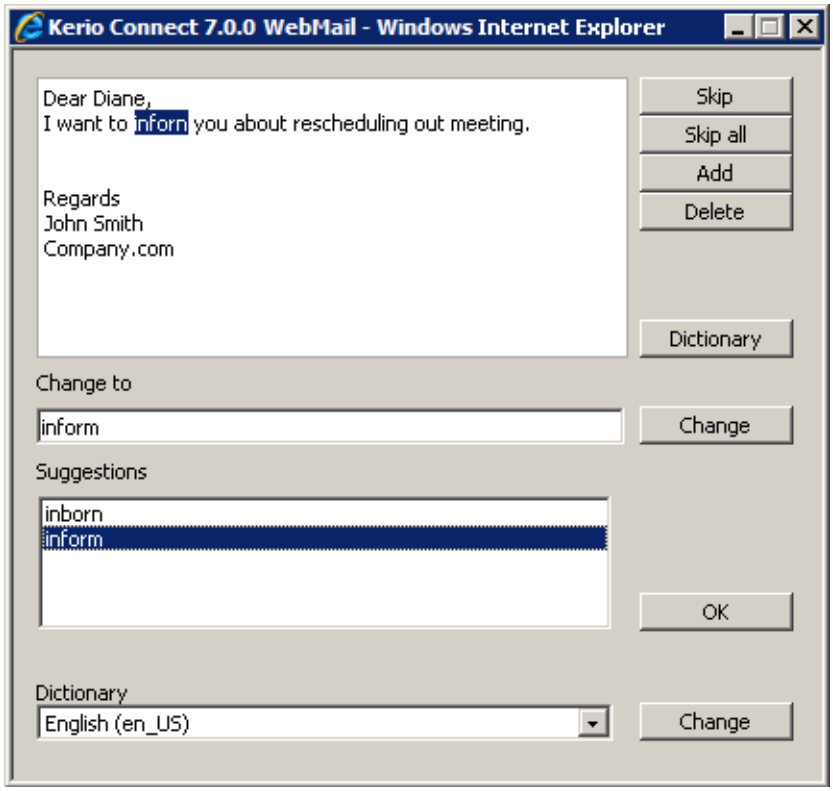


**Figure 1.30** Spellchecker

### *Dictionary*

*Kerio WebMail* contains a personal custom dictionary where unknown phrases not available in the default spellcheck dictionary can be entered. Each user can thus create his/her own dictionary.

The default dictionary used for spellcheck can be amended when needed. Select the *Dictionary* item from the *Settings* menu in the spellcheck dialog. Users can add or delete words to and from the dialog box that is opened. New words and expressions can be added to the dictionary also when spellchecking a message.

## 1.6.5 Spam filter

Spam messages are mostly represented by advertisements. Spam are usually sent in bulk and the recipient addresses are obtained by illegal means (e.g. by tapping the network communication). In their wilder modifications, spams may also distribute and seed dangerous viruses.

*Kerio Connect* contains a sophisticated antispam filter. The filter is designed so that it can recognize specific attributes of spam from the message contents (spam messages usually contain specific keywords that can be recognized and counted by the filter). Each message

is assigned a numeric score; if this value exceeds the limit set in *Kerio Connect*, the message is marked as spam.

### *Self-learning antispam filter*

The built-in antispam filter may let some spam messages through from time to time by mistake (their score is low) and mark some regular messages as spam (their score is too high). For the reasons above, the antispam filter allows modification to the database used for recognition of spam messages. This method, however, requires user input. Users should reassign the incorrectly evaluated messages to correct types (spam / non-spam) so that the filter learns to recognize them in the future.

*Kerio WebMail* uses the *Spam* and *Not spam* buttons located in the toolbar to mark the messages correctly. Highlight the incorrectly marked message and click one of the buttons. The filter receives information regarding update of the database. This decreases chance for incorrect deliveries.

### *A rule for unwanted messages*

All messages marked as spam can be automatically delivered to *Junk E-mail* folder, created in the folder tree for this purpose. This function may be enabled when creating the email account or it can be enabled by the users themselves in their user settings, on in the *Spam* tab (for details, see chapter 1.13.1).

To enable the spam rule, check the *Move spam to the Junk E-Mail folder* on the *Spam* tab (see figure 1.31). Once the rule is enabled, it is also recommended to enable the rule which allows messages sent from addresses included in the user's contact folders skip the antispam check.

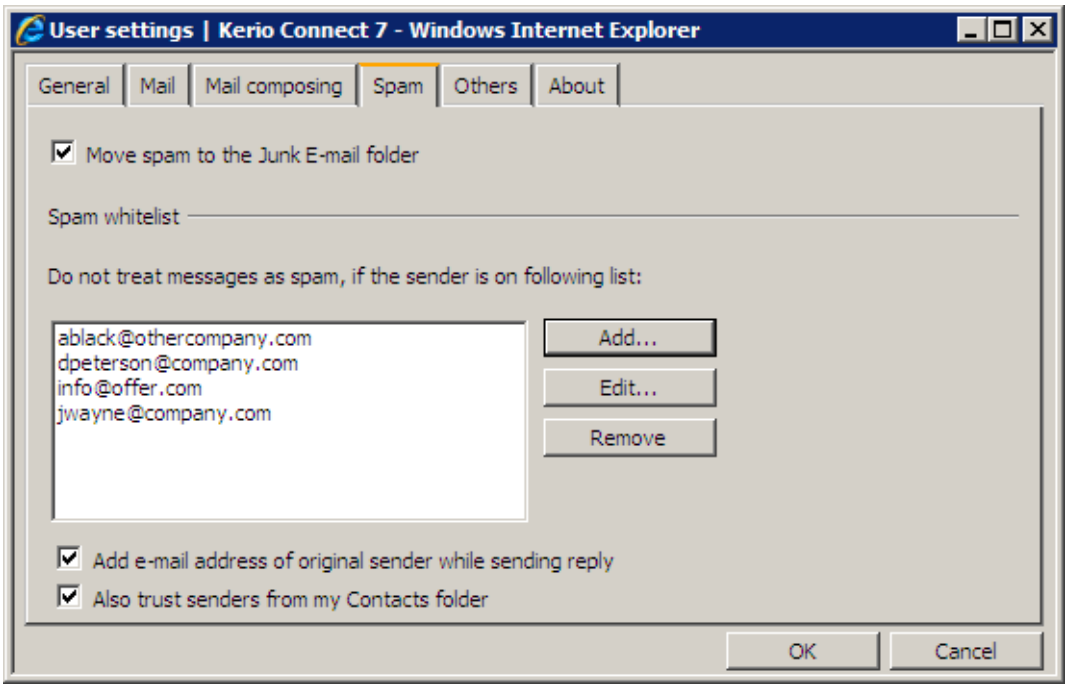


**Figure 1.31** User settings — Spam tab

It is also possible to add addresses to a special whitelist. Messages sent from the addresses involved in the list will be considered as non-spam. To add an address to the whitelist, users can use one of the following options:

1. On the *Spam* tab in user settings (see figure 1.31).

2. Right-click a message in the list to open the pop-up menu and select *Add user to spam whitelist*.

This option prevents from moving solicited messages with some attributes of spam to the *Spam* folder.

*Note:*
The spam rule has higher priority than rules set in the *Filters* dialog box (see chapter 1.14). If the filter includes any rule which in any way handles messages marked as spam, the action set in this rule is ignored.

### 1.6.6 Automatic check for email addresses

Automatic check for email addresses helps to accelerate writing of addresses and ensures that the addresses entered will be correct.

Upon entering of first letters of email address in the address entry, this feature uses all contact folders to look up all addresses matching the string. The search focuses on items *First Name*, *Last Name*, *E-mail Address* and *Company*. The offered items include also user groups with email address and distribution lists if their name (or their email address in case of groups) matches the string.

If multiple addresses matching the string are found, a menu is opened that lists all addresses, user groups and distribution lists matching the string (see figure 1.32).

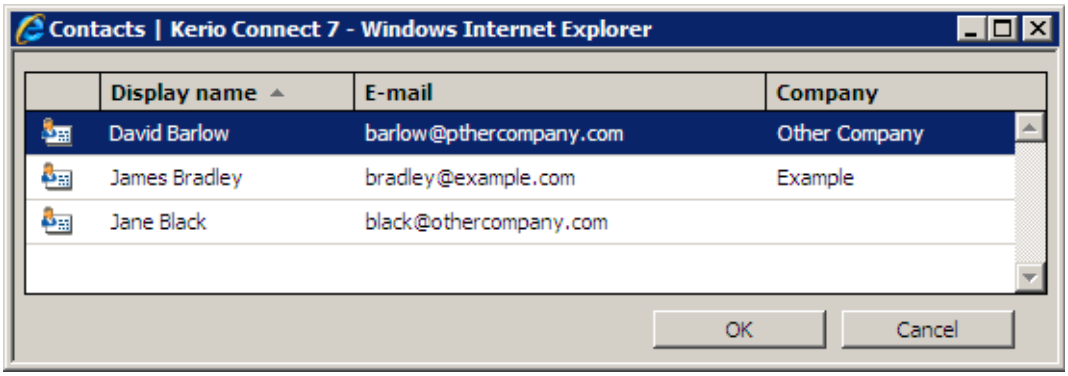


**Figure 1.32** List of contacts matching the string

Initiation of the look-up function depends on *Kerio Connect* configuration:

- Automatic check for addresses is disabled in *Kerio WebMail Settings* (see section 1.13.1) — to check for an address, it is necessary to click on the *Check Names* button icon available on the toolbar or to use the `Ctrl+K` keyboard shortcut.
- Automatic check for addresses is enabled in *Settings* — detected addresses matching the string are filled in the entry when the pointer is moved to another textfield. To check for addresses while entering multiple addresses, click on the *Check for names* icon on the toolbar or use the `Ctrl+K` shortcut.

In *Kerio WebMail*, the automatic check for addresses can be enabled/disabled under *Settings*:

1. Go to *Settings* (under *Settings* → *Settings*).
2. Switch to the *Mail* tab.
3. Check or uncheck the *Check names automatically* option (see figure 1.33).

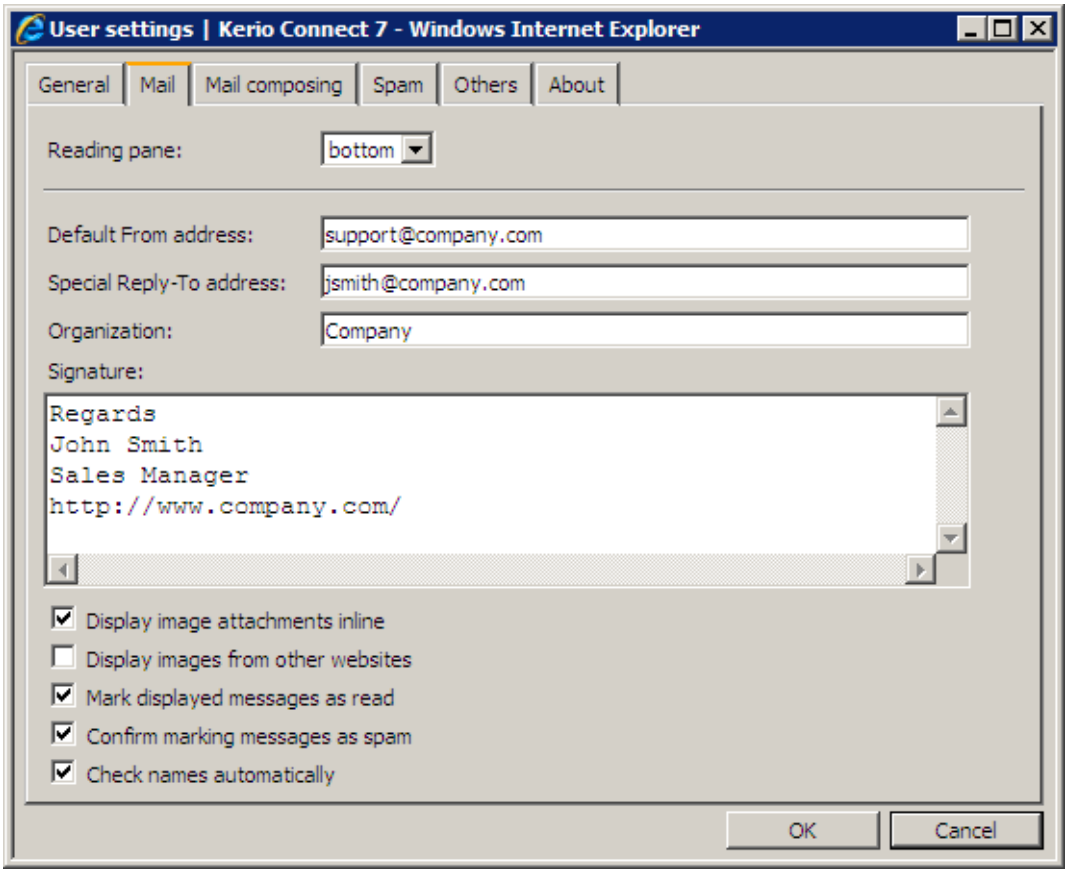


**Figure 1.33** Settings — Automatic checks for addresses

Addresses are searched in contact folders where the check is enabled. By default, the check is enabled only for the default private Contact folder and the default public Contact folder. Other folders can be added as described below:

1. Go to *Settings* (under *Settings* → *Settings*).
2. Switch to the *Mail composing* tab.
3. Click on *Choose folders* at the *Search for contacts in selected folders* item.
4. Check folders to be added to the scanned folders (see figure 1.34).

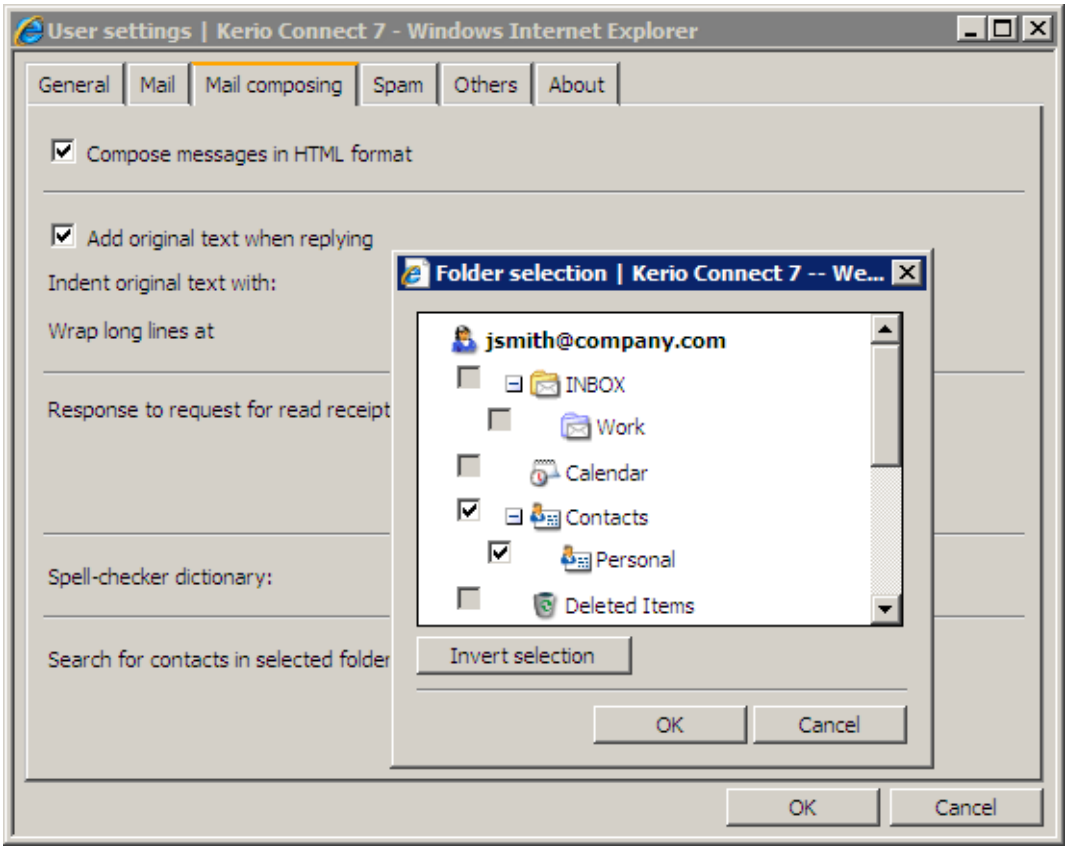


**Figure 1.34** Settings — Adding contact folders to the automatic check for names

5. Click *OK* to confirm settings.

> ***Warning:***
> The more folders are included in the check, the longer the search may take.

### 1.6.7 Looking up messages

The message look-up helps find specific messages quickly, using the criteria defined. The standard search form is used for searching messages in *Kerio WebMail* mail folders. Use the *Search* button (the magnifying glass icon in the toolbar) to open the form.

The search window is divided into three parts. The first part lists the folder where the search is performed (the current folder by default). To change this setting, click the *Browse* button located on the right of the *Folder* item.

The other part of the window contains two tabs used to define the search parameters. On the *General* tab, users can perform the basic search by subject or sender/recipient address:

**Search for:**
Insert a string that will be used as a searching criteria.

**Where**
Choose where messages will be searched — *Subject*, *Message body* or *Subject and message body*.

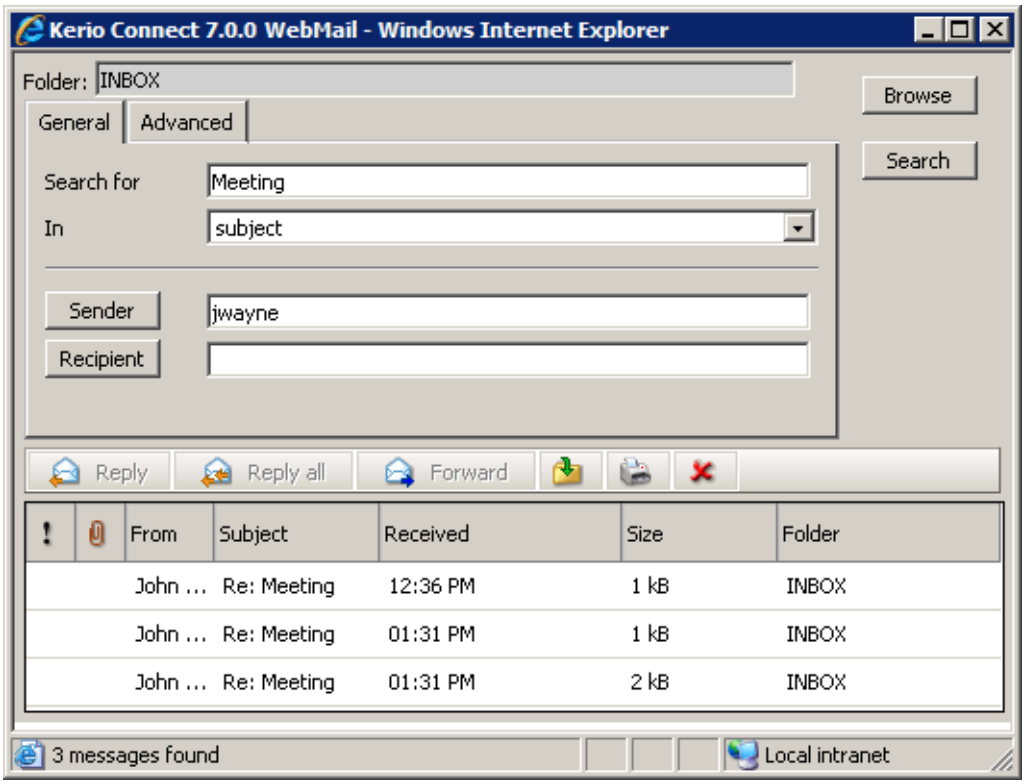


**Figure 1.35** Searching — General tab

**Sender**
Use the *Sender* textfield to specify a string that will be used as a searching criteria applied to senders' addresses. You can also click the *Sender* button to open a dialog box where email addresses can be selected from your contact folders.

**Recipient**
Use the *Recipient* textfield to specify a string that will be used as a searching criteria applied to recipients' addresses. You can also click the *Recipient* button to open a dialog box where email addresses can be selected from your contact folders.

It is also possible to combine searching criteria. For example, to search a particular message where you know the sender, use the *Search* (searching by subject) textbox to specify a particular string and the *Sender* field to enter an email address.

Use the *Advanced* tab to specify additional criteria for searching:

**Only items that are**
Narrowing of items by the read/unread criteria.

**Only items with**
Narrowing the list of items by the flagged/non-flagged criteria.

**Only items**
Narrowing the list of items by the attachment/no attachment criteria.

**Date**
Searching messages sent or received within the selected time period.

**Size**
Searching messages by size.

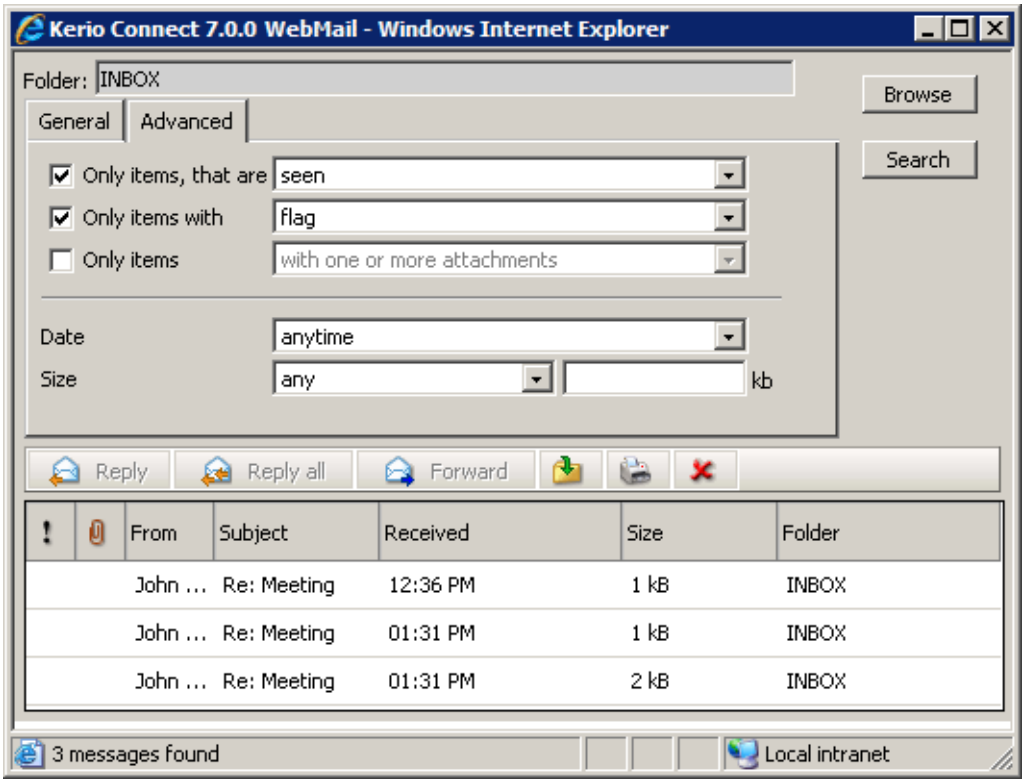


**Figure 1.36** Searching — Advanced tab

The last part contains a table with search results and a toolbar. Using this toolbar, users can handle individual messages right in the table.

#### *Using the Search field*

Another way of looking for a specific message is the *Search* field in the toolbar. Search string (a word, part of a word or a character) can be entered in this field. Messages are searched by email address, subject and message body. To exclude message body from search, check option *Only person or subject*.

The messages found will be listed directly in the message list.

### 1.6.8 Interrupted connection between the server and the browser

Sometimes, the connection between *Kerio Connect* and a web browser may be interrupted. Connection may be interrupted by a connection failure or by expiration of the session timeout set in *Kerio Connect*[1].

If the connection fails, it is necessary to reconnect by authentication by username and password.

If a message is just being edited when the connection fails, it is possible to finish it and reconnect by authenticating by username and password upon clicking on the *Send* button (see figure 1.37).

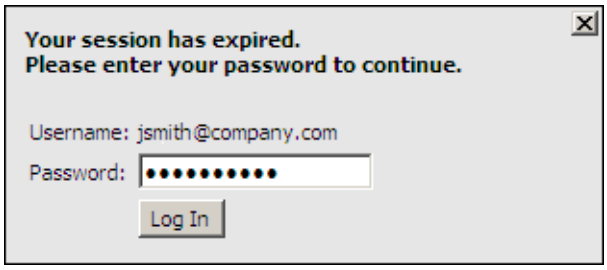


**Figure 1.37** The dialog for authentication through username

***Warning:***
Beware of closing the window with the edited message before the new authentication. Otherwise, the message will be lost.

[1] Kerio Connect allows setting of timeouts for total time of sessions and for idle connections. These settings increase security of Kerio WebMail usage.

## 1.7 Contacts

Most of us use or at least know address books and little notebooks where names, phone numbers and addresses of family members, friends, colleagues, business partners and other people are kept. Another possibility to remember contacts is keeping of business cards provided by people we meet. In these times of booming electronic communication where we are almost becoming slaves of time, looking contacts up in tiny pocket books and visit-card filers is too time-consuming and ineffective.

For this reason, contact folders have been developed. Actually, these folders are electronic address books replacing the old-fashioned methods of contact maintenance. In addition to the fact that all contacts are kept together, other advantages come along, such as easy look-up and automatic recognition of known email addresses while being written.

In addition to creating and maintaining of single contacts, contact folders allow creating and maintaining of distribution lists. Distribution lists are groups of contacts recognized by a single group name. This name is simply used instead of entering all included addresses separately.

### 1.7.1 Contacts display

The contacts in *Kerio WebMail* can be displayed in two ways; either as individual cards, or as a list of contacts. Use the menu in the toolbar to set the display mode (see picture 1.38).

For classification by contacts, items are sorted by the alphabet of the language set in *Settings* as preferred (the General tab) in *Kerio WebMail* — for details, see chapter 1.13.1. In result, if for example English is set as preferred and subject are in German, contacts will be ordered by English alphabet and some specific national characters may also cause problems in sorting.

By default, up to 20 contacts are listed on one page in contact folders. Number of messages displayed at one page can be changed, however, it is necessary to keep in mind that the same settings apply also to email and task folders. To change number of items displayed on a single page, use the *Settings* section in *Kerio WebMail* (see chapter 1.13.1).

#### *Cards*

Besides other methods, the cards can be sorted by alphabet letters, available below the toolbar as links. By clicking a specific letter, the first contact starting with this character will be highlighted.

> ***TIP***
> Pressing *Shift-letter* when searching in the row of letters, the contacts starting with this character are marked.

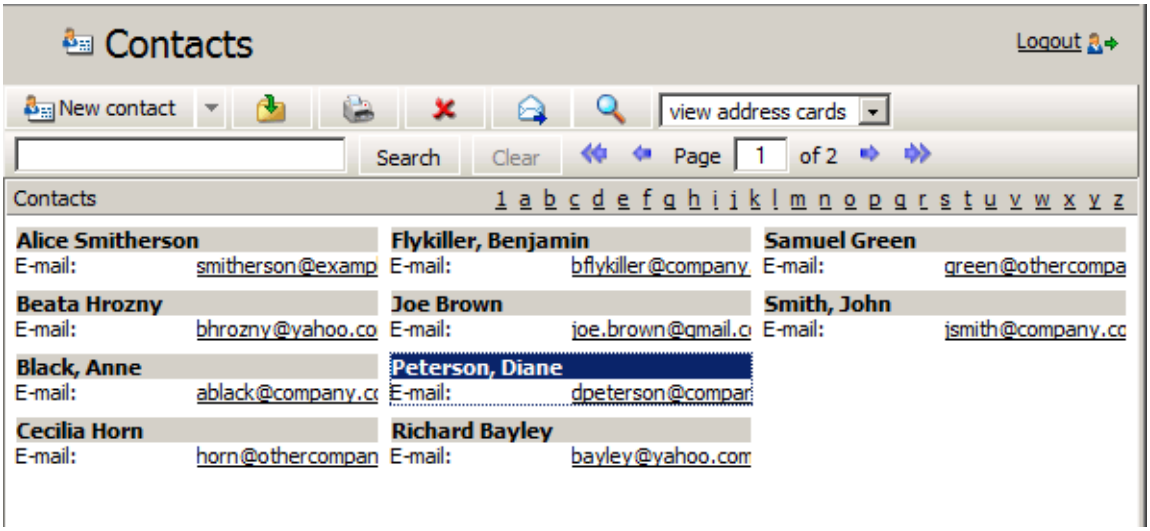


**Figure 1.38** Contacts

Users can also use the purple arrows to navigate between the pages with contacts.

### *List*

In the list view mode, information to individual contacts are listed in the columns. Contacts can be sorted according to the information This view mode provides several advantages. First, columns can be sorted and ordered in accordance with information they include. Click the column heading to sort contacts in the ascending or descending order (see the arrow next to the column name) by alphabet, numbers or time (depending on the column contents).

Users can also customize the information to be displayed. The columns can be added or deleted. Right-click the table header and specify the column settings in the window where columns to be displayed can be selected. The pop-up menu contains the *Change columns* option.

The width of the contacts list can be adjusted the same way as in the spreadsheet programs. To change the column width, click between two columns in the table header and drag the cursor right or left as needed. When the window is refreshed, layout of the columns is set to the default mode.

## 1.7.2 New contact

To create a new contact, follow these guidelines:

1. Open a contact folder.
2. Click on the *New contact* button in the toolbar
3. to access a dialog box with three tabs where the contact information can be entered.

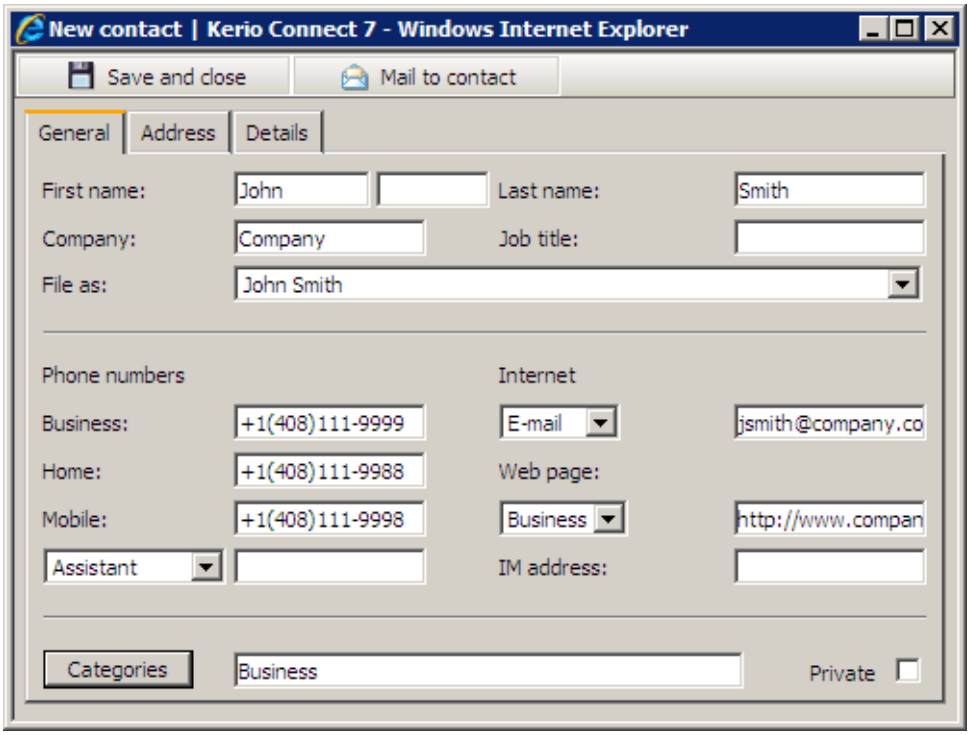


**Figure 1.39** New contact — General tab

The first tab (see figure 1.39) contains text boxes where general data about a person. (the first and last name, phone number, email address or personal web page URL can be specified).

In the *Address* tab, home address data for each user are stored. In this tab, three different addresses — *Business*, *Home* and *Other* — can be specified. The address type can be selected in the *Address* menu. Check the *This is the postal address* option to select one of the addresses as primary.

The *Details* tab contains additional information about the contact, such as birthday, anniversary or title.

### 1.7.3 Private contacts

Private contacts can be used especially for sharing of contact folders with other users. If a user shares a private contact folder with other users, it is possible to mark certain contacts as private. These contacts will not be displayed to anyone else except the user with whom the contacts are shared and even the person who shares these contacts cannot see them in the shared folder.

To mark a contact as private, do the following:

1. Double-click on the contact to show its details.
2. On the *General* tab, enable the *Private* option (see figure 1.39).
3. Save changes by clicking *Save and Close*.

***Warning:***
Private contacts are treated as private only if the client where the private contact folder is viewed supports this feature. In other client applications (like *MS Outlook*), it is possible to view and edit contacts without any restrictions by users with appropriate access rights. This implies that information included in private contacts are not well secured.

### 1.7.4 Searching in contacts

There are several ways of searching in contact folders based on the type of display. The cards display enables users to search for contacts using the letters under the toolbar. By clicking a specific letter, the contacts starting with this character are highlighted.

When contacts are displayed in the form of a list, only the standard ascending and descending order of messages is possible. Thus, searching for a specific contact is not very efficient, especially when there are too many contacts in the folder.

Searching for contacts using the Search window is completely different from the above procedure. Use the *Search* button (the magnifying glass icon in the toolbar) to open the window or enter a string (a word, part of a word or a character in the message to be searched for) into the *Search for:* field in the toolbar.

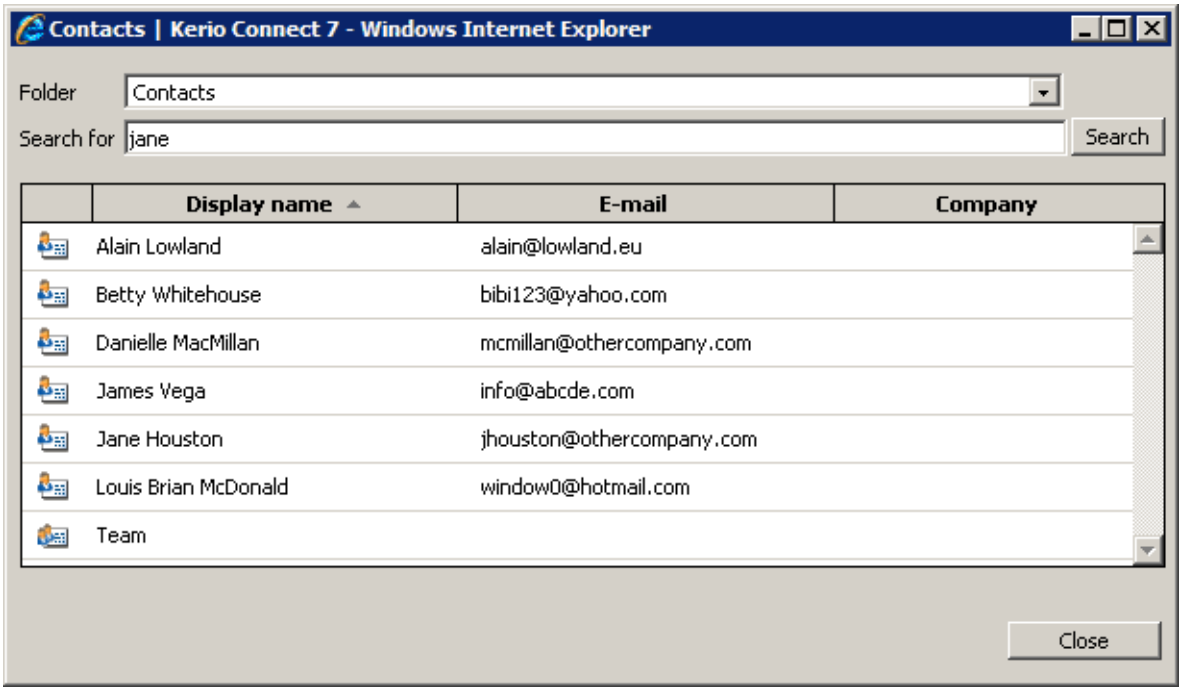


**Figure 1.40** Search contact

Use the first option (the magnifying glass button) When opened, the dialog window provides a list of all contacts saved in the folder. When searching for a particular contact, the following information is used as the search criteria:

**Folder**
: Set folders in which the search will be performed. By default, the folder from which the dialog was opened is selected.

**Search for:**
: This entry can be used to enter a string which will be searched (the first letters of first name, second name or username can be used). The search string is not case-sensitive. Click on *Search* to run the searching.

Users can also enter the search string into the appropriate field in the toolbar. Click *Search* to open the *Search* window. Only the contacts containing the specified string are listed. If the searched contact is not included in the table, retry the search process upon modifying the string or switching to another folder (the search applies only to the folder currently opened).

### 1.7.5 Contacts forwarding

*Kerio WebMail* allows contact forwarding in a special format so that forwarded contacts can be directly added to contact lists upon their delivery. Thanks to this feature, it is not necessary to copy contacts to email messages and to contact lists.

*Kerio WebMail* also supports another option. When a message with a contact in the attachment is received, the recipient can simply click on the attachment to open the contact automatically in the standard dialog box. Click on *Save and Close* to confirm settings and save the contact to the default private *Contacts* folder.

*Note:*
To save a contact or open it as an attachment, right-click on it and use one of the options available, *Open* or *Save*.

#### *How to forward contacts*

To forward a contact, follow these guidelines:

1. Use the cursor to select the particular contact and click on the *Forward* icon in the toolbar.
2. This opens the message composer with the contact already attached.[2]
3. Send the contact in the same way as email messages are sent.

[2] The contact is saved in as *vCard* (the `.vcf` extension).

### 1.7.6 Public contacts

In addition to contacts created by yourselves and stored in your personal folder, there is also a contact list available in the *Contacts* public folder. To read more about public folders, go to chapter 1.12.5. Most of users can only read these folders, without permission to edit them or create new ones. However, if you are a contact administrator, please pay attention to the information provided below.

Methods of how contacts are kept on the server differ. Whereas folders with personal contacts are not synchronized and users themselves are their administrators, the folder with public contacts is synchronized with data from user accounts which have been created either on the server or in a directory service. For that reason, it is not recommended to change full name, email address of contacts and the Global Address List category in the public folder of the *Kerio WebMail* interface. All these changes would be removed during next synchronization. If you need to edit a contact, please contact your network administrator. It would have to be edited in the user account (either in *Kerio Connect* or in the particular directory service).

### 1.7.7 Distribution lists

Distribution lists are groups of email addresses used for sending of collective email. Simply use a special dialog in K*erio WebMail* to complete desired email addresses and save them under a common name. Whenever sending an email message to such a group, simply enter the distribution list name in the *To* entry instead of filling in individual addresses.

Distribution lists are helpful if email is often sent to a group of addressees. For example, it can be a group of people with whom you often communicate in your work (it is a certain alternative to mailing lists or to group addresses).

Once created, distribution lists are displayed in the contact folder. If multiple contact folders are used, the particular distribution list is saved in the folder where it is created. If the list is for example created in a task folder, the distribution list is automatically saved in the default private contact folder, in *Contacts*. to distinguish distribution lists from other items in the contact list, they are displayed bold.

#### *A new distribution list*

To create a new distribution list, follow the instructions provided below:

1. Click on the button which allows creating of new items (see figure 1.41).
2. In the menu, select the *New distribution list* option.
3. This opens the window where you can create a new distribution list.
4. Now, specify name of the distribution list. For this purpose, use the *Name* entry.
5. Now, add email addresses to the list. The *Select* and *Add* buttons can be used for this purpose:

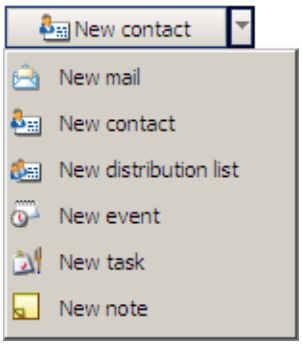


**Figure 1.41** Toolbar menu

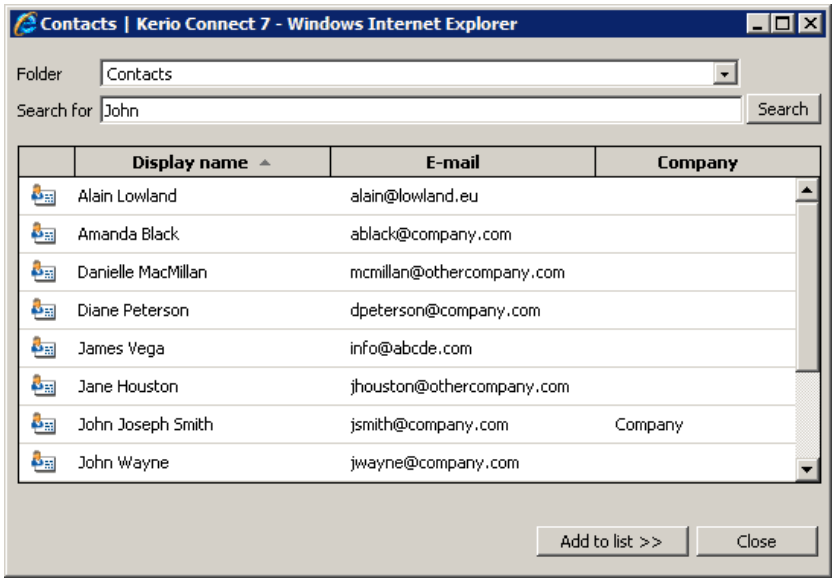


**Figure 1.42** Select

- The *Select* button opens a dialog where addresses can be looked up and selected in contact folders.

  The dialog contains the following items:

  **Folder**
  : The menu includes all contact folders in the mailbox (including public and subscribed contacts).

  **Search for:**
  : Enter a string which will be used as search criteria, i.e. any contacts including the string will be searched. First letters of first or second name or username (the part of address preceding the at-sign) can be used as the string. The search string is not case-sensitive.

  One or multiple contacts can be chosen in contact lists (by holding the `Shift` or `Ctrl` key and selecting items by the mouse pointer) and then added to the distribution list by the *Add to list* button. Double-clicking on a contact also copies

the particular item to the distribution list.

- Use the *Add* button to open a dialog where a new address can be added to the list. The address needs to be entered manually:

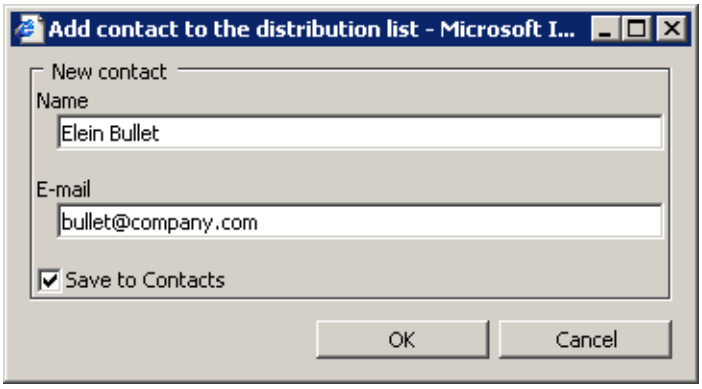


**Figure 1.43** Add

**Name**
Enter first and second name of the new distribution list member.

**E-mail**
Enter email address of the new distribution list member.

**Save to contacts**
Enable this option to save member information also in the *Contacts* folder.

- The *Remove* button can be used to delete an address from the list.

6. Save changes by clicking *Save and Close*.

A note can be attached to any distribution list. It can be for example a description of the group or another information. The note can be defined on the *Notes* tab of the distribution list dialog.

Besides the method described above, there is another way to create distribution lists. Simply select one or more items in the contact list (using the `Ctrl` key), use the right mouse button to open the pop-up menu and select *Create adistribution list* (see figure 1.44).

This opens a distribution list with the selected contacts already included. This list can be simply saved after entering its name. Contacts can be added anytime if desired.

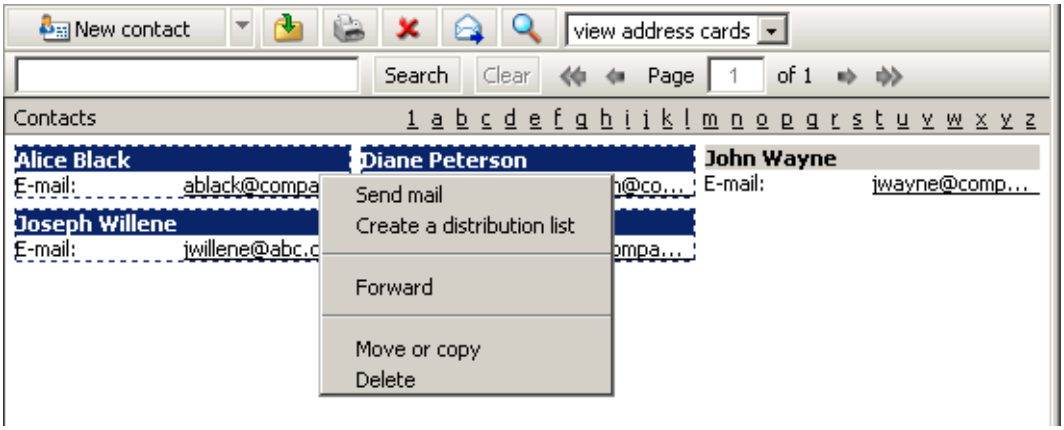


**Figure 1.44** Creating distribution lists by selecting contacts from the list

### *Edit and update distribution lists*

Each distribution list can be edited and also removed. To remove a distribution list, follow the same pattern as when removing a contact item. Simply select a distribution list by the mouse pointer and use either the *Delete* key or right-click on the item and use the appropriate option in the context menu.

It is also simple to edit a distribution list. Double-click on a distribution list to open it. Contact information can be edited, removed or a new one can be added. It is also possible to update a distribution list. It is necessary to perform updates where at least one contact has been changed since the last update. Usually, contacts are edited directly in a contact folder. Such changes take no effect in distribution lists. Therefore, it is recommended to update distribution lists from time to time by the *Update* button.

To save changes, click on *Save and Close*.

## 1.8 Calendar

This chapter focuses on folders used as a more efficient electronic substitute of paper calendars. What is it that is so amazing about electronic calendars? There are several benefits of these gadgets:

- visual alerts and event reminders,
- various view options (day, week, year, etc.)
- scheduling of meetings,
- resource reservation,
- access from anywhere provided that there is an Internet connection available.

Before we focus on features of calendar folders, basic terminology will be addressed. There are two most essential items, events and meetings. Events are calendar items with time scheduled whereas meetings are events where other participants are involved (invited).

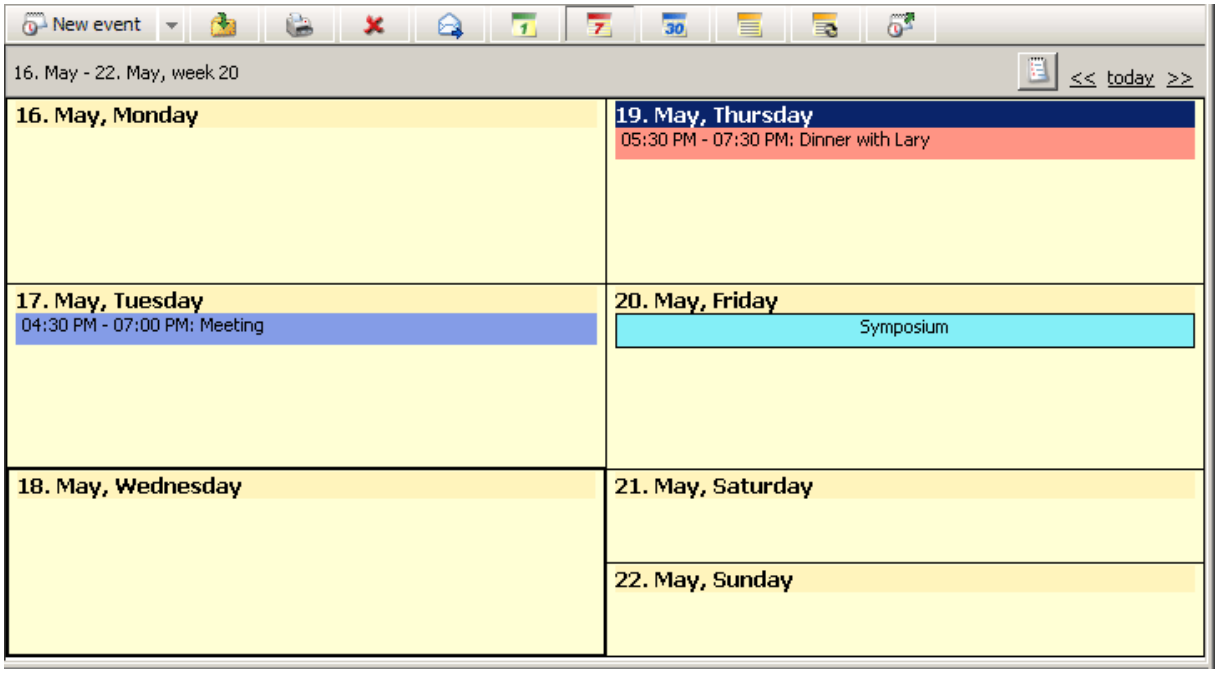


**Figure 1.45** Calendar

### 1.8.1 Calendar view

Several view modes are available for calendars. Users can select a view type which they currently find the most useful. In this section, detailed descriptions of individual view modes are provided.

Users can switch between individual types of calendar views by clicking the appropriate icon in the toolbar:

#### *Day view*

The day view is the most detailed one since it focuses the shortest period. The schedule is divided into 30-minute periods market by a clock symbol on the left. The current interval is highlighted in yellow color (the first half-hour of the 12th hour in the picture 1.46).

The single-day view header serves to better reference in the calendar. In the left section, the current day and date are displayed; in the right section, there is a thumbnail calendar icon with sliders.

The individual calendar events are ordered in a vertical timeline. Each event is marked by a colored stripe and it contains the basic information (subject, location, whether it is private or not and if is has a notification). Whole-day or multiple-day events are displayed in the upper section of the calendar, before the timed schedule (so that these events do not mess into the daily schedule).

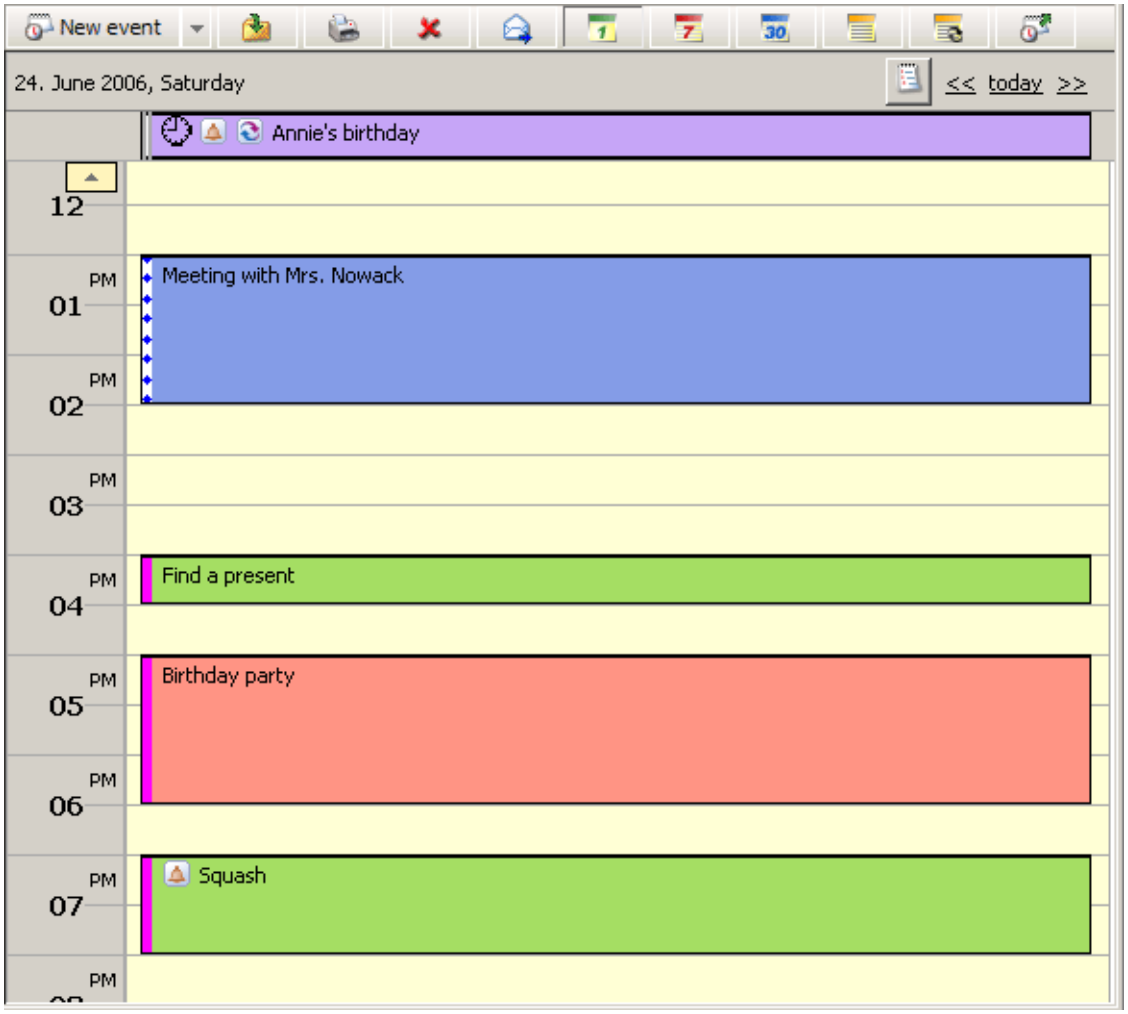


**Figure 1.46** Day view

The events in this type of view can be moved to a different time using the mouse pointer or extended to cover more hours. To move an event, move the mouse pointer to the left stripe marked with a different color. After the pointer changes its shape to four arrows, click the left mouse button and move the event to another time. To extend or reduce the time interval of an event, move the pointer to the upper or lower area of an event and after the pointer changes its shape, click the left mouse button and edit the event as necessary.

Focus once again on the left colored vertical stripe. This area shows the time of the event's duration. If the event is shorter than half an hour, the stripe is shorter as well so that users can recognize the time period taken by the event.

The colored stripe also shows level of the user's busyness during the event:

- purple stripe — away,
- full blue stripe — busy,

- dash blue stripe — tentative,
- grey stripe — free.

The fastest and most simple way to open and edit an event is to double-click on it.

To open a new window and define a new event, double-click on the calendar line corresponding to the time which we want to set the event for. The time is set automatically in accordance with the row where the new event was opened. The day is also preset in the definition.

Events in the calendar may be distinguished by colors (see figure 1.46). Colors associate various event types (such as events referring to work, to private issues, to important issues, etc.) and make manipulation with the calendar more transparent. Colors of events can be defined in the event's edit dialog.

### *Week view*

One week display mode (including Saturday and Sunday). The events in the week view are marked as colored stripes (according to the event type). If more events are displayed in a single day, they are ordered by type as follows:

1. The all-day or multiple-day events — these are displayed without any time limitation. If there are more all-day events specified in one day, they are ordered by subject alphabetically. The all-day events are described in chapter 1.8.4 in more detail.

2. Time-ranged events — repeated events, meetings, etc. If multiple events are defined for a day, they are ordered by the time when they were set.

The events of the same type are displayed in descending order according to their scheduled time.

The events in this type of view can be marked by different colors. These colors represent different event types and can be specified in the edit dialog box — chapter 1.8.2).

Each event can be moved to any other day in the week displayed. Click the selected event (after the pointer changes its shape to four arrows) and drag it to another location in the calendar.

*Note:*
Only events with no recurrence set can be moved.

Today is marked by a box in the weekly view.

A new event can be created by double-clicking on a selected day. An event editing window will be opened with the date information automatically set to the selected day.

To display the previous or next week, use sliders on the right of the dialog box. Users can also use the thumbnail calendar icon next to the sliders. Click the icon to open the month calendar. The today is marked by a box. When another day in the calendar is clicked, the main display

of the calendar is also switched to the selected day. To switch to today, click on *Today*. The current week is marked in the left corner of the bar.

#### *Month view*

It is similar to the week view, but the events for the whole month are displayed.

#### *List view*

This view type provides a comprehensible list of events where every single line stands for one event and includes relevant information. By default, events are ordered by their starting dates. The list of events includes all items where no recurrence is set.

This view mode can be helpful especially when a particular event is searched since it allows ordering of the items by simple clicking on a particular parameter's header. Click the heading again to change the order from ascending to descending and vice versa.

By default, up to 20 events are listed on one page. To change number of messages displayed on a single page, use the *Settings* section in *Kerio WebMail* (see chapter 1.13.1).

The information to be displayed in the list can be chosen. Sometimes it is better to hide some columns in order to make the navigation easier, sometimes showing more columns is desired. Right-click the column heading to open the dialog box with column selection. The pop-up menu that appears contains the *Change columns* option.

***TIPS***

1. If using meetings, it may be useful to show the column with the attendees, to view who has been invited.
2. To see the duration of each event, show the *Duration* column.

The column settings apply to the event list as well as the list of repeated events.

The column width can be modified in the event list. To change the column width, click between two columns in the table header and drag the cursor right or left as needed.

#### *Repeated list view*

This view is similar to the previous one, but it shows only the repeated events.

### 1.8.2 Creating and editing events

Events are all items created in the calendar. New events can be added in a special create-and-edit dialog. To open this dialog, use the *New event* button on the toolbar or the corresponding option available in the context pop-up menu (opened by right-clicking on the calendar's main panel).

*Meetings* are special events. This event is shared by multiple participants (invited users). For details on how to create a meeting, see section 1.8.7.

Some events and meetings can be repeated in regular periods. To set periods of repetition for an event, click on *Recurrence*. When recurrence is set for an event, the item will be repeated in the calendar according to the settings. For detailed information, read chapter 1.8.5.

### *Event settings*

Use the *General* tab to define basic configuration (see figure 1.47):

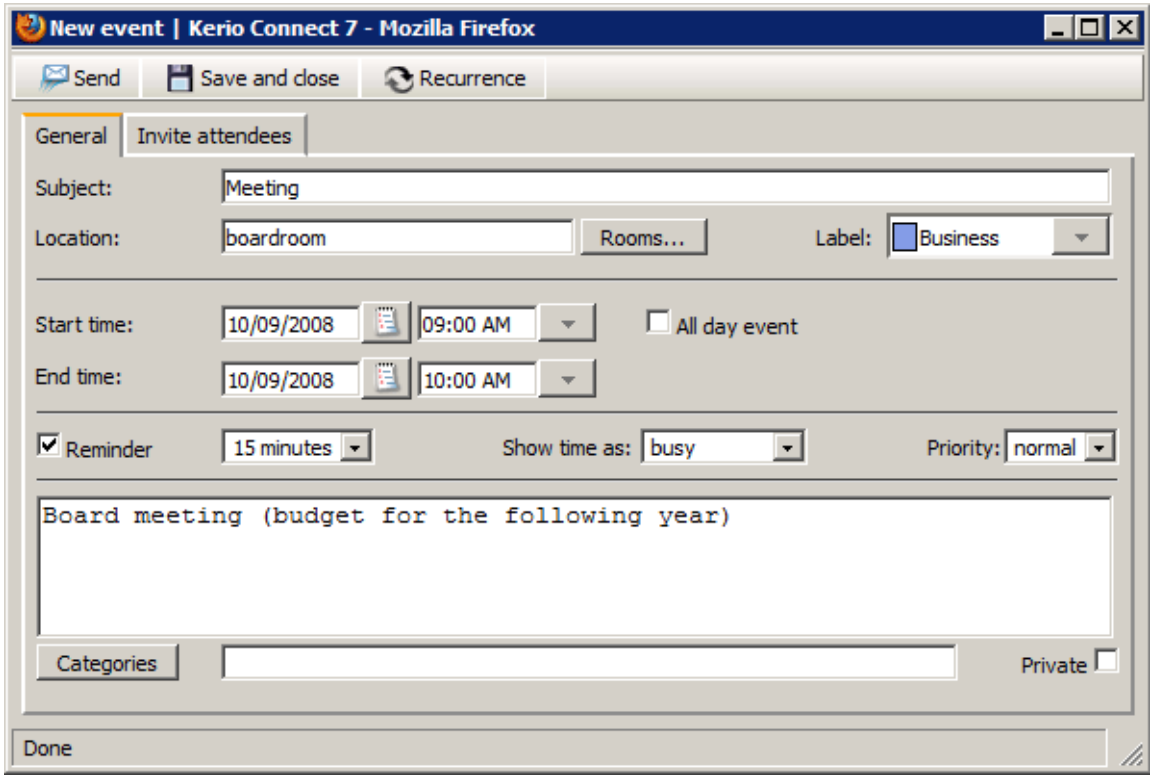


**Figure 1.47** Event settings

**Subject**

The summary information about the event. This information will be displayed in the calendar window after the event is saved, therefore it should be as brief as possible.

**Location**

Location of the event.

If you use the resource scheduling feature in your company, clicking on *Rooms* lists all rooms available for reservation.

**Label**

Use this menu to specify the type of event. A specific color next to the description represents the type of event. The same color will be also used to mark the event in the calendar.

**Start time**
Start time of the event.

**End time**
End time of the event.

**All day event**
In the *All day event*, the start and end time items are missing. This means that this event will be in progress over the entire day, but other events can be still planned for this day. The typical example is setting entire-day events like wedding anniversaries, symposiums, vacations, business trips, etc.

**Reminder**
Reminder is a special function of the *Kerio WebMail* interface that allows reminding of events. If the reminder is set for an event, an alert is displayed at the defined time that informs of an upcoming event(s). The default alarm time is set to 15 minutes, but any different value can be selected from the drop-down list. To cancel the reminder, simply disable the option in the event's edit dialog box.
The event reminder (see figure 1.48) is displayed as an alert window including a list of upcoming events. Each row contains the subject of the specific event (task) and time left to the upcoming event.
*Note:*
Besides events, it is also possible to use the reminder for *Tasks*. Therefore, a single alert window may contain both events and tasks if their reminder time is the same.
It is also possible to set another interval for later reminder of the event. This might be helpful especially when you have no time to focus to the event's subject at the particular moment. Set the desired time to the next reminder (from five minutes to two weeks) in the pull-down menu in lower part of the window and click *Remind me later*.
It is also possible to double-click on the alert window to view the event.

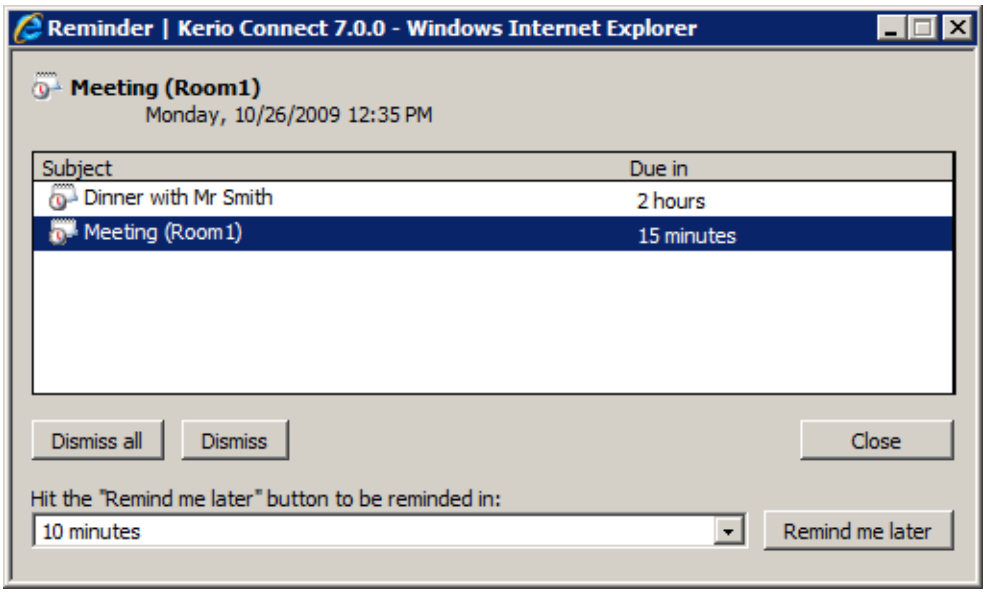


**Figure 1.48** Reminder

Click the *Dismiss all*/*Dismiss* buttons to cancel the selected reminder or all reminders. The dismissed reminder will not be displayed any more unless it relates to a repeated event.

***Warning:***

1. The reminder window is active only when *Kerio WebMail* is running.
2. Alerts are displayed only if reminders are set in the default personal *Calendar* and *Tasks* folders (default folders which are created with each user account). Reminding alerts are not displayed for custom calendar and task folders.

**Show time as**

In this item, users can select the state of the user during the time of the event. Three status modes are available: *free*, *tentative*, *busy* and *out of office*. Selecting the state is useful e.g. when the *Free/Busy* server is used for scheduling and communication (for more details on this topic, see chapter 1.8.7).

**Private**

The *Private* option allows hiding of the event in case the calendar is shared with other users. Events set as private cannot be viewed by other users (for details, see chapter 1.8.3).

**Comment**

To any event it is possible to add a comment referring to various issues such as event details or lists of items related to the event.

**Categories**

The *Categories* item is useful only if the web interface is used in connection with *MS Outlook* with *Kerio Outlook Connector* preinstalled. Use the tools in this application to display the events in individual categories.

Click the *Categories* button to display the list of default categories. Users can also create new categories that are more suitable.

### 1.8.3 Private Events

Events are private when they are set as *Private*. This feature allows to hide private events in shared calendars. The users with whom the particular event is shared cannot view its content, edit it or remove it. Such users will see only the item labeled as *Private event*. The only information these users learn from the calendar is date and time.

*Note:*
In the *Free/Busy* calendar, the level of busyness and the time of private events are available.

Private events can be created as follows:

1. Open the *New event* dialog box.
2. Insert relevant information.

3. On the *General* tab, enable the *Private* option (see figure 1.47).

4. Save changes by clicking *Save and Close*.

***Warning:***
Private events are treated as private only if the client where the private event calendar is viewed supports this feature. In other client applications, it is possible to view and edit events without any restrictions by users with appropriate access rights. This implies that information included in private events are not well secured.

### 1.8.4 All (multiple) day event

All-day events are special events useful especially when the user leaves for a business trip for one or more days, when we want to note someone's birthday, etc.

All-day events may be 24, 48, 72, etc. hours long and it is only bond to particular date(s). All-day events are always displayed above the other, time-anchored events of the day (see figure 1.49). This type of event is not included in the day schedule because users can add other types of time-limited events in the day schedule. No starting or ending time is specified for all-day events.

To set the all-day event, check the *All day* option in the dialog box for creating an event (see picture 1.47).

All-day events are not moved according to time zones since they are bound to date, not to particular time. This means that if for example an all-day event is set for December 24, 2006, this date will be kept for all time zones. To learn more on behavior of events in different time zones, read chapter 1.15.

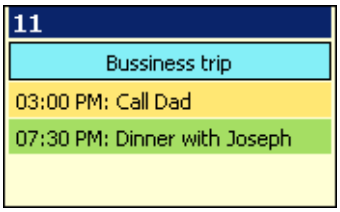


**Figure 1.49** Month view events

#### *Multiple-day event*

The multiple-day event is created the same way as the all-day event, but the time range must be specified in the *Start* and *End* fields in the event's edit dialog box.

Examples of multiple-day events are multi-day business trips or vacation.

*Note:*
Multi-day events can also be created by non-checking the *All-day* option and simple setting an event for more days. The only difference in the layout may arise from frequent trips to various time zones, as events can be moved accordingly to the current time zone. To learn more on behavior of events in different time zones, read chapter 1.15.

### 1.8.5 Recurred event

For periodically repeated events the *Repeat* mode can be set. This feature enables for example setting of regular company briefings or regular Thursday Scrabble parties with friends. Simply define the event once and set its repetition. To set recurrence of an event, click the *Recurrence* icon in the top-left of the *Edit event* dialog box.

Various types of recurrence periods are available —daily, weekly, monthly or every year. Range of the recurrence (validity) can be also set. Just set an initial and the final date.

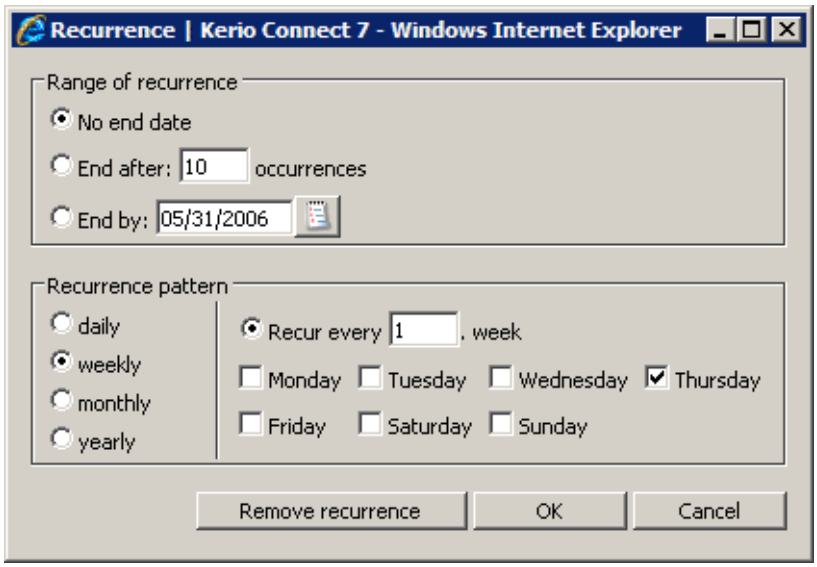


**Figure 1.50** Event recurrence

#### Range of recurrence

Set the desired range of recurrence.

- *No end date* — the event will be repeated for an unlimited period (useful for birthdays, anniversaries, etc.).
- *End after ... occurrences* — the recurrence is over when the specified number of recurrences is reached.
- *End by* — the repetitions will occur during the specified time range (including the end date).

**Recurrence pattern**

Several recurrence patterns are available (*daily*, *weekly*, *monthly* and *yearly*). For each one, different parameters can be set in the right part of the dialog.

### 1.8.6 Exceptions from repeated events

If an event is set as repeated, it may need to be edited to change or remove any of the occurrences. You can simply do it in the calendar of the particular event as follows:

1. In the calendar select the event occurrence day to be changed.
2. Double-click on the event to open a dialog box where you can select whether to change only the particular occurrence or all the following occurrences as well (see figure 1.51).

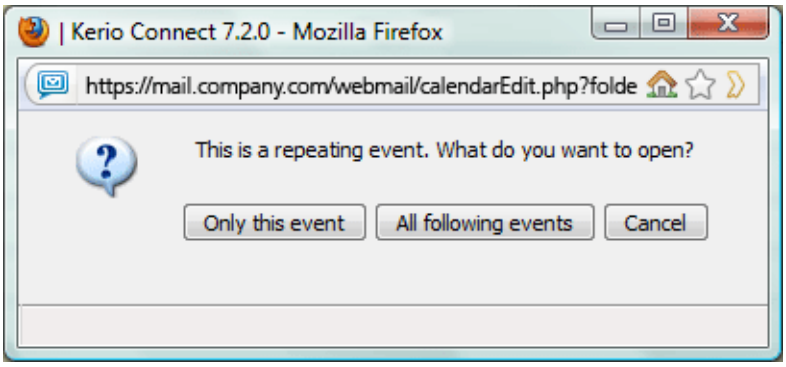


**Figure 1.51** Editing a repeated event

*Removing Events:*

If the event includes multiple participants, it is possible to check the corresponding option to *Inform users/organizer that the event has been canceled*. *Kerio Connect* then informs all participants about any changes by email.

3. Edit the event, confirm changes and save. A crossed icon appears next to the event.

***Warning:***
If you choose *Only this event*, possible changes will later not be reflected in other occurrences of this event.
If you change an event which you did not create and the original creator updates this event, your changes will be overwritten.

*Note:*
If your calendar is currently set to the *Daily View*, you can change events by dragging them with your mouse. In such case, the repeated event will be changed in your calendar only, which means that other participants including the organizer will not be informed about this change.

### 1.8.7 Appointments

Meetings are special events where email addresses of other participants can be involved. Once a meeting is created, addresses can be added to which the message will be sent — these special messages are called invitations. Invitations are special messages informing users of topics, times and place of a meeting. Invitations include special accept/reject buttons.

Information derived from the participant's reaction is sent to the meeting initiator (chair member). The initiator thus know whether the persons invited come or not.

It is also possible to send updates related to meetings when the initiator modifies the invitation.

In addition to the option of creating of meetings, meeting scheduler tools are also included in *Kerio WebMail*. If participants are added who also use a *Kerio Connect* account, meetings can be scheduled in accordance with free time information available in calendars of these users.

#### *How to create meetings*

Meetings are created in the same way as events. Simply open adialog where an event can be edited and specify corresponding parameters in the *General* tab (for more information, refer to chapter1.8.2). Then create a list of attendees who will participate in the meeting. This can be done on the *Attendees* tab.

By default, the *Attendees* section includes only the name of the meeting initiator. Use special buttons to add more attendees (see picture 1.52). Several types of attendees can be created:

- Required — this group includes invited persons who should not miss the meeting from any reason. The invitation includes this information so that each user addressed knows if their presence is required or not.
- Optional — this group includes users who can decide whether to come or not.
- Source — special type of attendee. To learn more on resources and their reservation, read section 1.8.8.

There is also the chair attendee, a special attendee type. This member cannot be changed. The chair attendee is the appointment's founder.

Attendees can also be divided between those to whom the invitation will be sent and the others. It is also possible to create meeting and include attendees without sending them any invitation. By default, however, sending of invitations and meeting newsletters is enabled.

Below, you can find instructions on how to create a list of attendees:

1. Two buttons located below the list can be used to add attendees (see figure 1.52):
   - Use the *Attendees* and *Resources* buttons to browse for attendees and resources in contacts (see figure 1.53). Look up and select addresses of resources or attendees you want to add.

The dialog contains the following items:

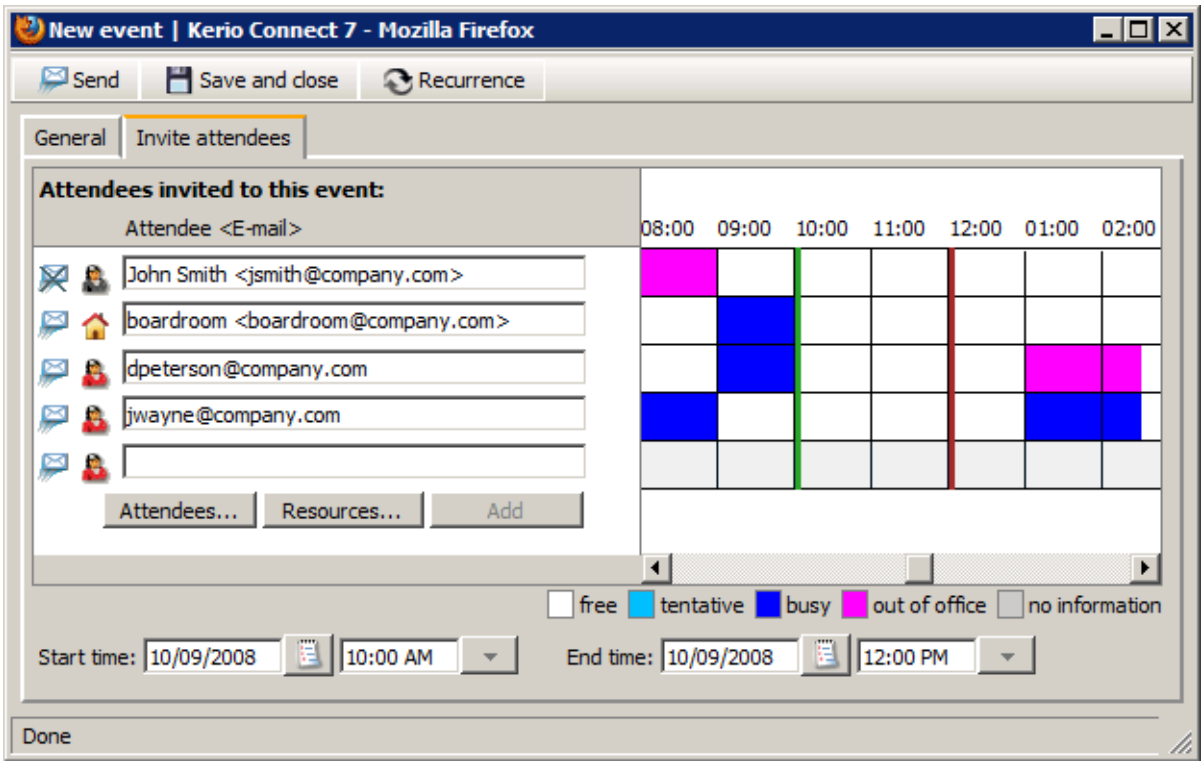


**Figure 1.52** Attendees

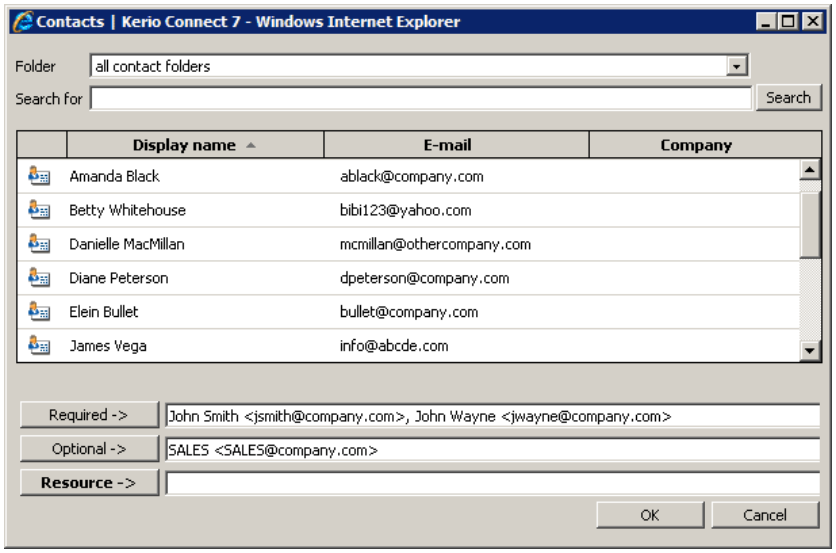


**Figure 1.53** Select

### Folder

The menu includes all contact folders in the mailbox (including public and subscribed contacts).

**Search for:**

Enter a string which will be used as search criteria, i.e. any addresses including the string will be searched. First letters of first or second name or username (the part of address preceding the at-sign) can be used as the string. The search string is not case-sensitive.

One or multiple addresses can be selected from the list (by left-clicking while holding the `Ctrl` key), or the *Required*, *Optional* a *Resource* buttons can be used to add selected addresses.

*Note:*
Addresses can be also added to the attendee list by double-clicking on a particular item. The address is filled in the active entry. At figure 1.53, the *Required* is currently active. The button name preceding the active entry (*Required*, *Optional* or *Resource*) is bold. You can switch between entries by clicking on a particular textfield.

Once attendees are selected, save settings by the OK button. The dialog is closed and all selected addresses are listed. Various icons are used to mark attendees as required, optional or resource. Roles of attendees can be changed (see figure 1.54)

- Use the *Add* button to add users to the list by hand. In case you know the particular email address by heart, this method is the fastest one. The *Add* button can also be used if the address we intend to add is not included in our contact lists.

  The *Add* button is not active unless there is at least one line blank where another address can be added. Once addresses are filled in all entries, the button is activated so that another line can be added.

2. To set or change attendee type, simply click on the attendee icon in the list and perform the settings (see figure 1.54).

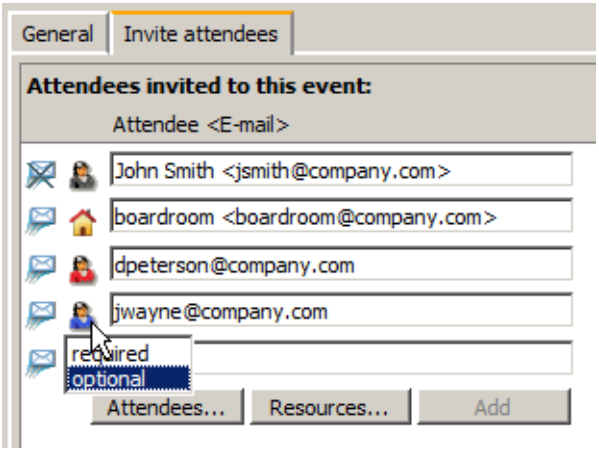


**Figure 1.54** Setting an attendee's status

3. To enable/disable sending of invitations and updates to individual users, simply click on the envelope icon next to the particular user's name and set an appropriate option in the menu (see figure 1.55). Simply choose *yes* to send the invitation or *no* not to send it.

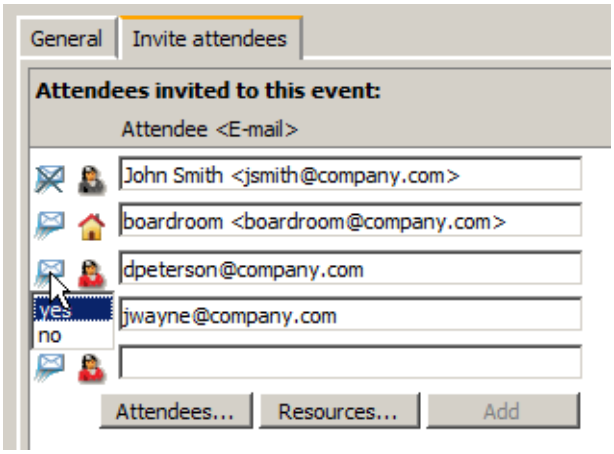


**Figure 1.55** Sending an email message to an attendee

When inserted, events can be sent to attendees or just saved by the *Send* and *Save and close* buttons provided on the toolbar.

### *Updating and canceling appointments*

Only the event organizer can update or cancel appointments. Other attendees will be informed about the change by email.

In the event list, select the event to be edited double-click it to open the *Edit event* dialog box. Change what you need to change and send the update to the attendees.

To cancel the event, select *Delete* in the context menu (see figure 1.56). You can also select an event and use the *Delete* key to remove it.

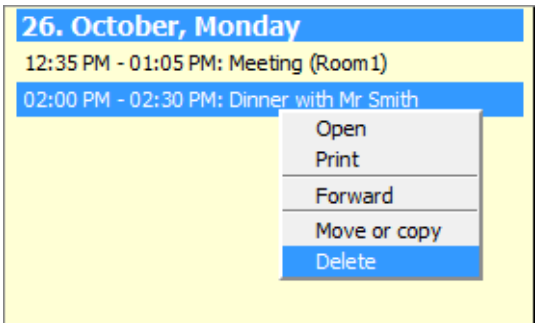


**Figure 1.56** Deleting events

### *Scheduling of meetings*

As denoted right at the start of this chapter, a special tool is provided for time scheduling. It is known as *Free/Busy* calendar and it might simplify creation of meetings. Thanks to the *Free/Busy* calendar feature, it is easy to find out whether participants invited to the meeting are free or busy in the time scheduled by comparing the meeting date and time calendars of these users. It is, therefore, easier to find a time range where all attendees required to participate in the meetings are free. This feature help us avoid many phone calls and emails that we would otherwise make or send.

*Free/Busy* calendar exploits information on user's free time from the calendar of the particular user. However, the meeting initiator can only see when the attendee is free or busy. It is not possible to view particular details on the user's activities.

*Free/Busy* calendar is displayed in the event's edit window on the *Attendees* tab in the section addressing meetings. The *Free/Busy* calendar is enabled automatically when attendees are entered in the list. To the right from the list, you can find the *Free/Busy* calendar (see figure 1.57).

The *Free/Busy* calendar also provides information on how much busy the user is. Degree of user's busyness is suggested by the color. Color key is provided below the *Free/Busy* calendar.

The *Free/Busy* calendar displays all meetings and events included in the default calendar folder and its subfolders. If you want that some events (e.g. items of a private calendar) are not shown in the *Free/Busy* calendar, create a new calendar folder out of the branch of the default calendar and its subfolders.

> ***Warning:***
> *Free/Busy* information is displayed only for attendees with an account in the *Kerio Connect* (usually, this function is used to set meetings with colleagues). The information is not displayed for external attendees (as shown at figure 1.57).

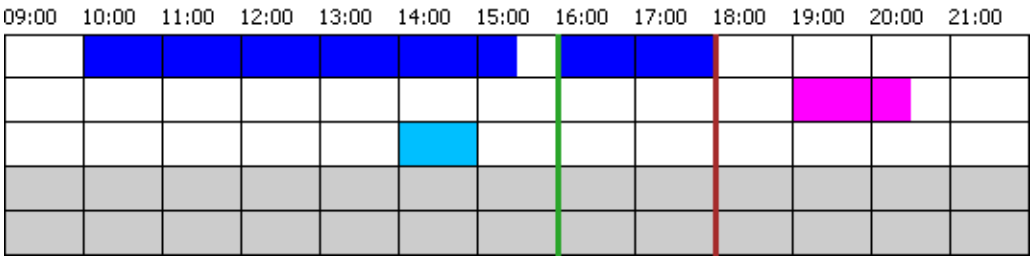


**Figure 1.57** The free/busy data of the users

As shown at figure 1.57, *Free/Busy* is kind of a timeline. Each *Free/Busy* line shows free time information related to a particular user. Colored parts refer to time segments when the user is busy or free. The two vertical lines (a green and a red) show where the meeting we are setting starts and ends. Ideal conditions are when no colored field interferes with the range set by the two lines. Both lines can be moved within the timeline as needed. To move lines, use the *Start time* and *End time* fields located below the timeline section. These fields are interconnected with fields of the same names on the *General* tab. This implies that if these items are change on either of these tabs, the values are automatically copied to the twin items.

Now, let us see the attendee's view of *Free/Busy* To make the *Free/Busy* information as relevant as possible, the following conditions should be met:

- Each user should use their *Calendar* folder and include all their events in it.
- Degree of busyness should be set in the *Show time as* menu (see figure 1.58) of the event's edit dialog.

  In the *Show as* menu, the following options can be specified:

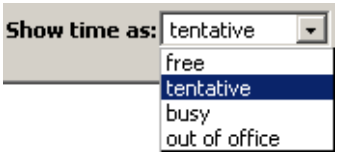


**Figure 1.58** Setting of busyness level

**free**
: Such event is not displayed in the *Free/Busy* calendar. Use this mode when you can be interrupted while completing a task or for entire-day anniversary events.

**tentative**
: This event is highlighted by a light blue color in the *Free/Busy* calendar. This option may be useful especially for events where time settings can be changed if needed.

**busy**
: This event is highlighted by a dark blue color in the *Free/Busy* calendar.

**absent**
: This event is highlighted by a pink color in the *Free/Busy* calendar.

The *Free/Busy* calendar works only for users of one *Kerio Connect* application. Other users will be displayed in grey color, since there are no free/busy data available for them.

### *Invitations*

Short description of invitations was provided at the top of this chapter. In this section, we will focus on invitation's layout and on how to react when an invitation is delivered to your mailbox.

Invitations use a special icon, different from the one used for usual email messages (see figure 1.59). Upon clicking on an invitation, meeting information is shown along with several buttons. Name of the meeting is provided in the header (at figure 1.59, `Meeting` is simply set as the name). Below, you can find basic information such as when and where the meeting takes place and a list of attendees, both required and optional. If your name is included in the list of required attendees, you should accept the meeting. Otherwise, it is up to you whether you choose to participate in the meeting or not.

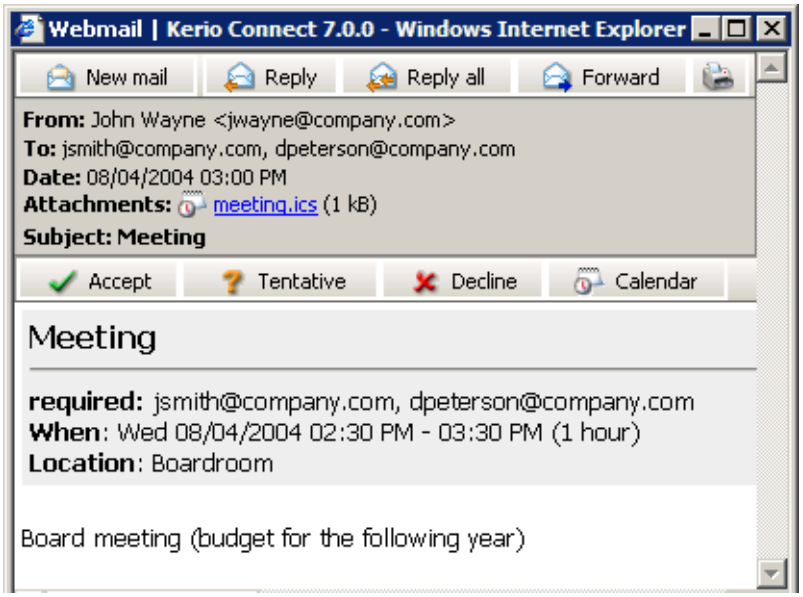


**Figure 1.59** Acceptation or declination of a meeting

As soon as an attendee receives an invitation, the event is automatically added to their calendar as "tentative". This lets anyone know that they may be an event scheduled for the particular time and the user might be unavailable.

Buttons located below the basic meeting information allow fast response, as follows:

- *Accept* — upon clicking on this button, an email message informing of acceptance of the invitation is sent to the meeting initiator and a green icon appears at the name of the name of the user who has accepted the invitation (the same icon as used on the *Accept* button in the invitation).

- *Tentative* — upon clicking on this button, an email message informing of acceptance of the invitation is sent to the meeting initiator and an orange question mark icon

appears at the name of the name of the user who has tentatively accepted the invitation (the same icon as used on the *Tentative* button in the invitation).

- *Decline* — upon clicking on this button, an email message informing of acceptance of the invitation is sent to the meeting initiator and a red cross icon appears at the name of the name of the user who has rejected the invitation (the same icon as used on the *Decline* button in the invitation).

Upon clicking on any of these buttons, a dialog box is opened where a message to be attached to the acceptation status notice can be entered. No additional information is required since the necessary data has already been entered by the moment.

In addition to the options described above, there is another button labeled as *Calendar*. This button opens a special dialog box including a one-day view of the calendar with the date and time of the meeting marked so the user can easily find out whether the event collides with another activity or not. This help us make an appropriate reaction.

Once the event is answered, the invitation is removed from the email folder and the meeting is marked in the private calendar if accepted.

*Note:*
If the attendee accepts the updated invitation first, the original invitation gets obsolete automatically (see figure 1.60).

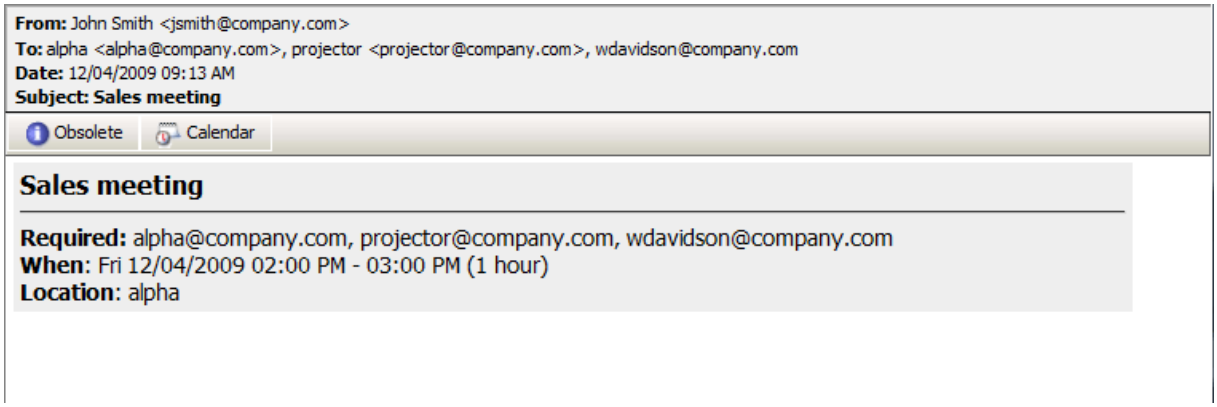


**Figure 1.60** Obsolete event

### 1.8.8 Resources

In *Kerio WebMail*, resources are meeting rooms and devices (such as over-head projectors, whiteboards, cars, etc.) shared by multiple employees across the company. To make resources be as helpful and efficiently used as possible, resources and their reservations are managed by administrators. The resource management system is a part of *Kerio Connect*, fully available in *Kerio WebMail*.

Resources can be booked by using the existing calendar system. Resource reservation is based on creating of en event. The feature works similarly as appointment scheduling. The main difference is that the *Attendees* tab must include the resource selected from the contact list (it

can naturally also include contacts of attendees). The *Free/Busy* shows whether the particular resource is available for the suggested time or not (details on Free/Busy calendars and on appointments are provided in section 1.8.7).

*Note:*
To make a resource available for booking, it is necessary to create it in *Kerio Connect* first. If you need to create a new resource, contact your network administrator.

### *Resource scheduling*

To book a resource, follow these instructions:

1. Open a new event and specify its subject on the *General* tab.

2. To reserve a room, click on *Rooms* and select the corresponding item (see figure 1.61).

   Another option is to switch to the *Attendees* tab. There you can enter the room in the same manner as you enter attendees.

   *Note:*
   To check whether the room is not reserved yet for the desired time, go to the *Invite Attendees* tab and see the Free/Busy calendar for the information whether the event planned does not collide with another event already scheduled for this time.

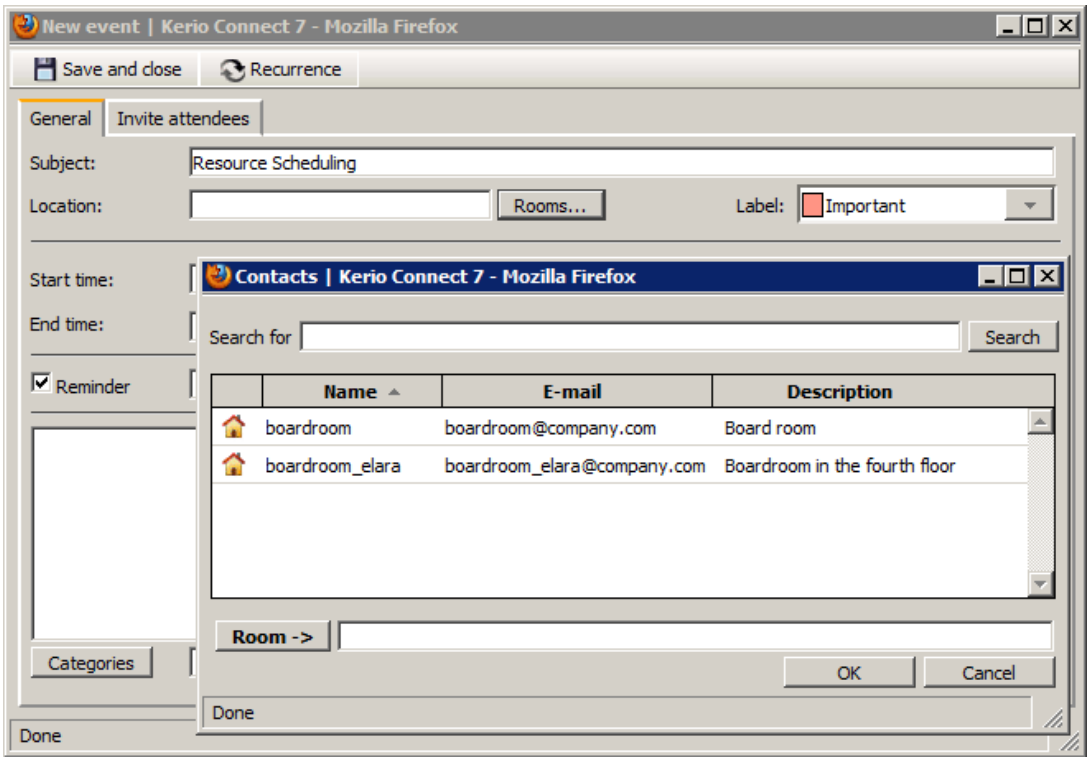


**Figure 1.61** Booking rooms

To reserve a facility, switch to the *Invite attendees* tab and click on the *Resources* button (see figure 1.62). In the list, select a resource. There are both rooms and devices included in the list. In the right section of the dialog, you can see the item's Free/Busy information (information referring to the attendee as well as the resource). It is therefore easy to check right away, whether the source is free or already booked by another user for the suggested time.

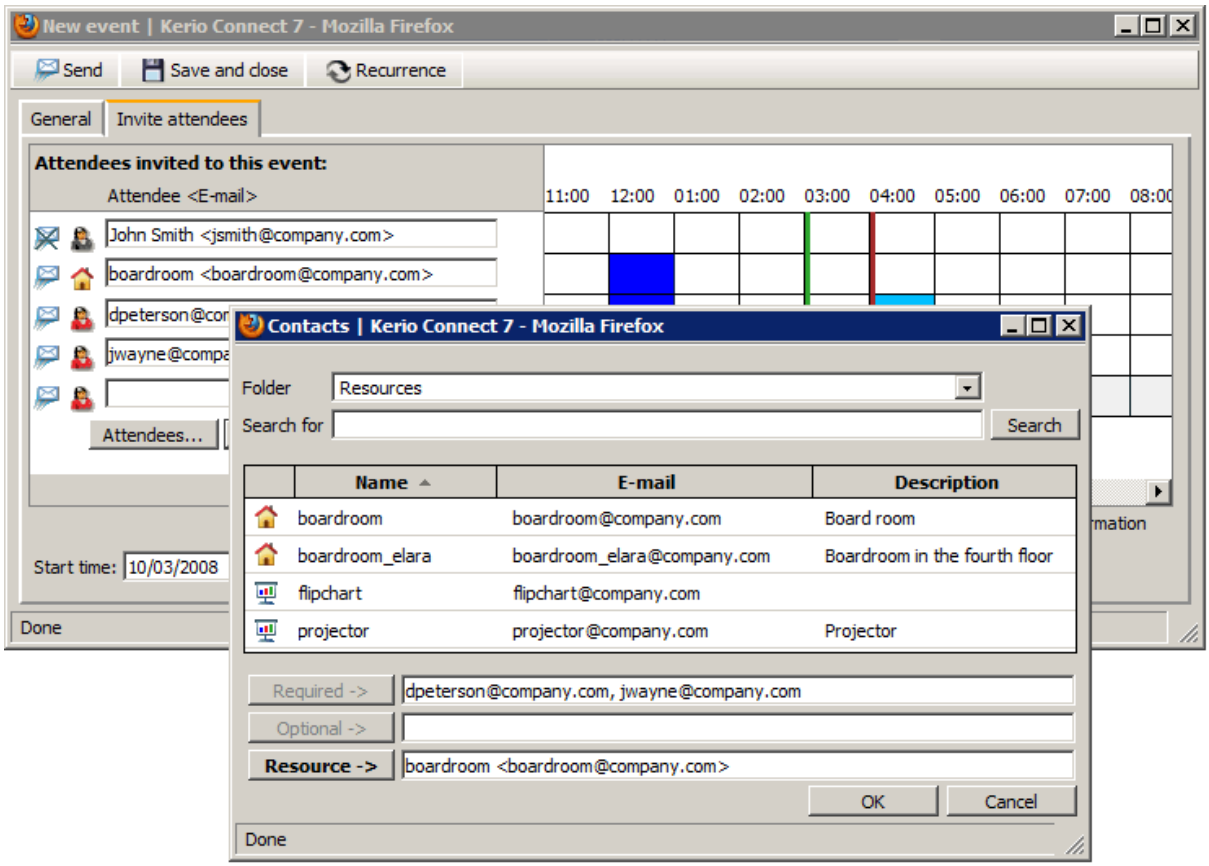


**Figure 1.62** Resource reservation

You may have noticed that there are also other attendees in the list shown in figure 1.62. Resources can be reserved either for usual appointment or for meetings (see section 1.8.7).

### *Resource calendar*

Each resource created in the system has its own calendar where all reservations are displayed. Calendars of individual resources can be subscribed through the standard sharing process (subscription of shared folders is focused in chapter 1.12.6).

Most user can access resource calendars in the read-only mode. Resource calendars can be edited only by the resource manager. The role of resource managers and their rights are addressed in the following section.

### *Reservation management*

In certain situations, it is necessary that a resource is booked even if it has already been reserved or that there is no other way than to make the reservation by a phone call. For such purposes, there exists a user with special rights who is a manager of the company resources and can access their calendars. Resource managers can access resource calendars with administration rights. This implies that they can edit, remove or move reservations in the particular resource calendar.

If you are a resource manager, first it is necessary to subscribe calendars of all resources that you would manage:

1. In the folder tree right-click on the root folder and select *Subscribed shared folders* in the pop-up context menu (see figure 1.63).

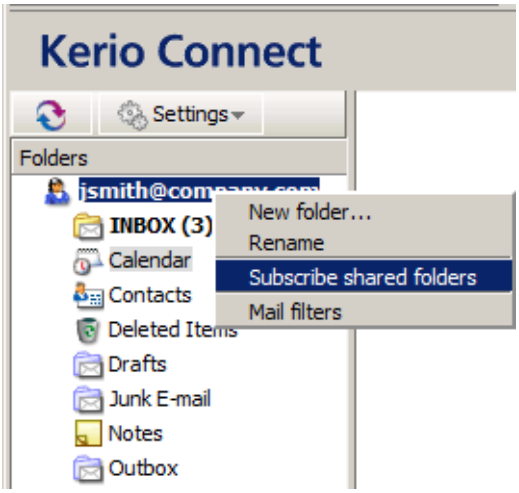


**Figure 1.63** Context pop-up menu of the root folder

2. In the *Subscribe shared folders* dialog, enter the resource name and confirm specification by clicking on *OK*. Now subscribe the Calendar folder just displayed (see figure 1.64).

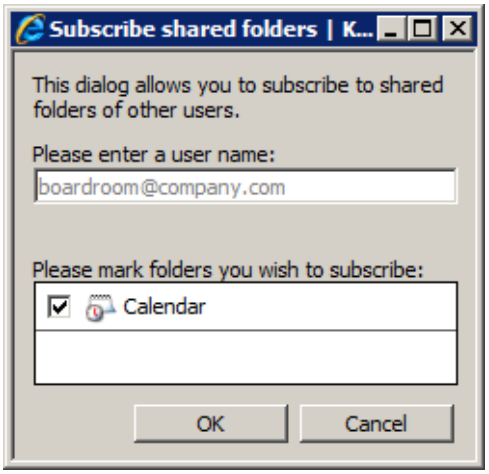


**Figure 1.64** Subscription of shared folders

3. If you manage multiple resources, subscribe their calendars in the same way.

Once subscribed, calendars of individual resources are shown in the folder tree. Each resource calendar now shows all reservations of the particular item done by any users. The resource manager can edit reservation time, add new reservations or remove them if demanded.

### 1.8.9 Events forwarding

*Kerio WebMail* allows forwarding of events in such a format so that it is possible to save it to the calendar directly. Thanks to this feature, it is not necessary to copy event data to email messages and to the event's edit dialog box at the addressee's side.

*Kerio WebMail* also supports another option. When a message with an event in the attachment is received, the recipient can simply click on the attachment to open the event in the standard event edit dialog box. Click on *Save and Close* to confirm settings and save the event to the *Calendar* folder.

*Note:*
To save an event or open it as an attachment, right-click on it and use one of the options available, *Open* or *Save*.

#### *How to forward an event*

To forward an event, select it by the mouse pointer and click on the *Forward* button on the calendar folder's toolbar (it is also possible to use the corresponding option in the pop-up context menu).

Select an event and click on a corresponding icon to open a message editor where the event is included as an attachment.[3] The message can be edited before it is sent.

## 1.9 Mailing Lists

Mailing lists are based on an email address shared by all users included in the group — messages sent to the address are distributed to all members of the corresponding mailing list.

All actions are executed by sending emails to special accounts.

### 1.9.1 Member Subscription/Unsubscription

If allowed by the list policy, members may subscribe to the list via email. The subscription is done by sending any message (even with blank message body) to the list address of the following form:

`<mailing_list_name>-subscribe@<domain>`

[3] The event will be saved in the *iCalendar* format (`.ics`).

*Example:* A user wants to subscribe to a list called `discussion` in the `company.com` domain. He/she sends a message with an empty message body from his/her email account to the address

`discussion-subscribe@company.com`.

After sending this message the user will receive an email requesting confirmation of the subscription. Once the user sends a response to this message, the user's request will be accepted. This response system guarantees the authenticity of the user.

According to the mailing list policy, the user will be either subscribed or will have to wait for confirmation of a list moderator. If subscribed successfully, the new member will receive a welcome message.

Members can unsubscribe by email at any time. The unsubscription can be done by sending an email message with any content in the message body (it can be left empty) to the address of the following form:

`<maling_list_name>-unsubscribe@<domain>`.

*Example:* A user intends to unsubscribe from the `discussion` mailing list in the `company.com` domain. He/she sends a message with an empty message body from his/her email account to the address

`discussion-unsubscribe@company.com`.

After sending this message the user will receive an email requesting confirmation of the unsubscription. Once the user sends a response to this message, the user's request will be accepted. After a response to the request is received, the user will receive a report regarding his/her unsubscription.

### 1.9.2 Message posting

If auser intends to send amessage to the mailing list, he/she must send it to the list address (e.g. `discussion@company.com`). According to the policy, the message will be either delivered to each list member (including the sender if he/she belongs to list members) or forwarded to list moderators for approval. In such case the sender receives an informative message and the post is published in the mailing list once it gets approved by its moderator. If the message is denied or not allowed by a moderator within 7 days, the sender will receive a report as well.

### 1.9.3 Aliases within Mailing Lists

In each mailing list, special email addresses are generated automatically. These addresses are used for special functions, such as member login, contact addresses of the list moderators, etc. Each of these addresses has the following form:

`<mailing_list>-<extension>@<domain>`

(e.g. to send arequest to the `discussion` mailing list help within the `company.com` domain, users will send amessage to: `discussion-help@company.com`

Here the suffixes that can be used in the list address are listed:

- `subscribe` arequest for login to the mailing list,
- `unsubscribe` arequest for logout from the mailing list,
- `help` arequest for help for the mailing list usage,
- `owner`, `owners` sending amessage to the list moderators (there is no need to know their email addresses),

## 1.10 Tasks

Every single day, we complete various tasks — at work, at home or anywhere else. Those of us equipped with an excellent memory can remember them, others use various tools such as little notepapers and check them off when the items are completed. Task folder play the role of these notepapers in the electronic environment.

Advantages of electronic tasks involve especially central storage of all tasks and automatic alerts, informing of upcoming events.

Tasks in folders are organized in a table where each line stands for one task including task name and other information available, such as priority level, etc.

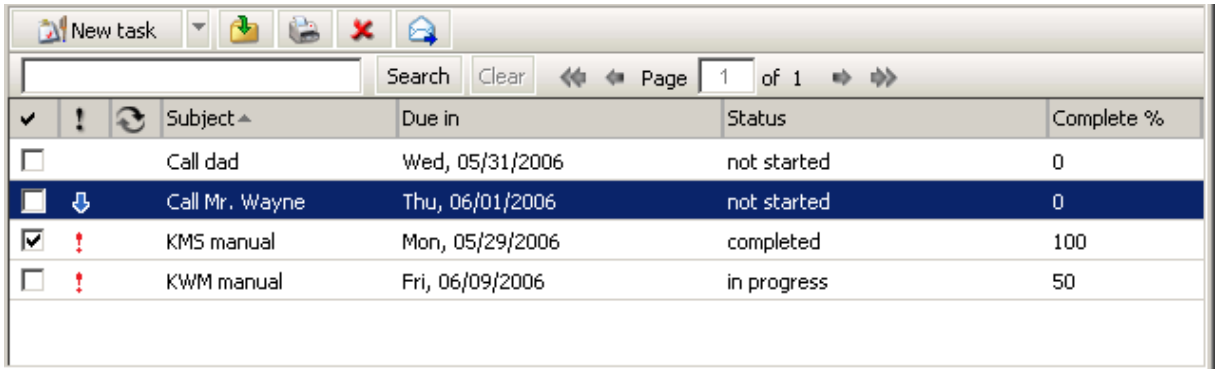


**Figure 1.65** Tasks

*Task* folders are equivalent to other folders. They can be shared, set as public or attached. For more information on shared and public folders, see chapter 1.12.

### 1.10.1 Task list display

In *Kerio WebMail*, the tasks are shown in a simple list that contains data such as the name of the task, scheduled deadline and the status of the task (percentage as well as description).

By default, up to 20 tasks are listed on one page. To change number of messages displayed on a single page, use the *Settings* section in *Kerio WebMail* (see chapter 1.13.1).

#### *Sorting tasks by columns*

The detailed information on individual tasks is displayed in the columns. The tasks can be sorted by the details listed in individual columns. Click the column heading to sort tasks in the ascending or descending order (see the arrow next to the column name) by alphabet, numbers or time (depending on the column contents).

*Note:*
For listing by subject, items are sorted by the alphabet of the language set in *Settings* as preferred (the *General* tab) — for details, see chapter 1.13.1. In result, if for example English is set as preferred and subject are in German, subjects will be ordered by English alphabet and some specific national characters may also cause problems in sorting.

#### *Adding and deleting columns*

Users can customize the appearance of the table and the information shown. The columns can be added or deleted. Right-click the table header and specify the column settings in the *Select fields* window. The pop-up menu contains the *Change columns* option. Checked columns will be shown in the dialog box, unchecked columns will be hidden.

#### *Adjusting the column width*

The width of the task list table can be adjusted. To change the column width, click between two columns in the table header and drag the cursor right or left as needed.

#### *Solving tasks*

After a specific task is solved, it can be marked as solved in the task list using the checkboxes before each task. When the task is checked, its status is set to *completed* and date and time of the completion are set.

### 1.10.2 Creating and editing tasks

To create a new task, use the task edit window. To open the dialog, use the *New task* option available on the toolbar. The edit dialog box includes two tabs where the following parameters can be set:

#### *Task settings*

In the *General* tab, the following task details can be defined:

**Subject**
: Insert a text which will be later shown in the task list as well as in the *Reminder* window (if the reminder is enabled for the task). The text should not be too long and it should be as comprehensive as possible.

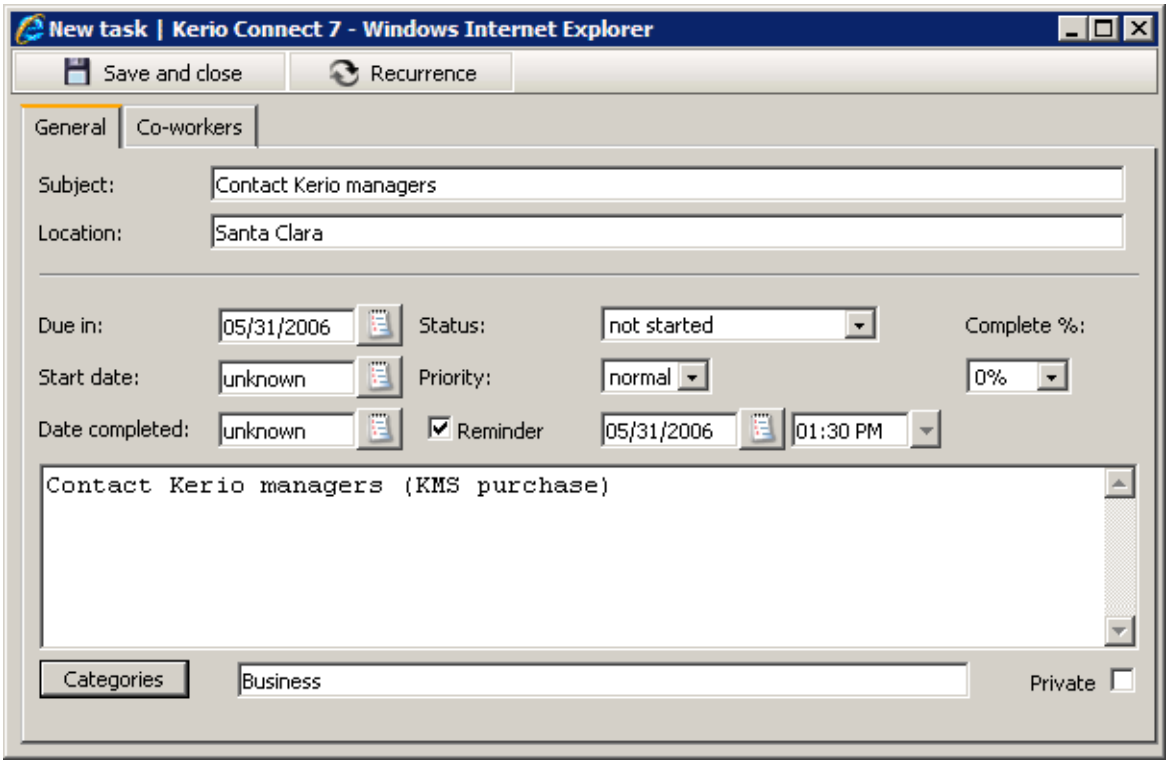


**Figure 1.66** Task settings

**Location**
Task location.

**Due date**
Time required for completion of the task.

**Start date**
The date to start on the task.

**Date completed**
Date of completion.

**Status**
Each task goes through several stages during the process of its completion:

- *Not started* — the task has not been started yet.
- *Waiting for someone else* — useful in cases where the completion of the task depends on another person/other people).
- *Completed* — the task is completed and 100% is automatically inserted in the *Finished* field.
- *In Progress* — the task is being solved. It is possible to enter a number specifying what percent of the task has already been completed in the *Done* field.
- *Deferred* — the task cannot be completed at the moment (e.g. as there are higher priority tasks). It is useful to set *Reminder* time to avoid the situation that the task is kept in the list uncompleted.

**Priority**

Using this option, the task priority can be defined. Tasks with highest priority are marked with a red exclamation mark, a low priority task is marked with an arrow.

**Reminder**

This feature enables users to set a reminder to an upcoming due date. The alarm time can be set to a specific day and time. The option can be disabled by unchecking the box.
The reminder is displayed as a popup window that lists the events and tasks to be reminded at that time. Each row contains the subject of the specific event (task) and time to the next reminder.
Users can extend or reduce the time to the next reminder of a specific event. Set the desired time of event recurrence (from five minutes to two weeks) and click *Remind me later*.
Click the *Dismiss all* or *Dismiss* buttons to cancel the selected reminder or all reminders. The dismissed reminder will not be displayed any more unless it relates to a repeated event.

> ***Warning:***
>
> 1. The reminder window is active only when *Kerio WebMail* is running.
> 2. For notifications, only the basic calendar and task folders (standard folders created automatically when the user account is created) are searched through in *Kerio WebMail*. If users create other calendar and task folders, keep in mind that the event and task notification will not work in *Kerio WebMail*. However, if the notification timeout expires when *MS Outlook* is running, a notification is displayed in a standard *MS Outlook* window.

**Complete %**

Shows what percent of the task has already been completed.

**Comment**

Detailed information can be provided for each task.

**Categories**

The *Categories* item is useful only if the web interface is used in connection with *MS Outlook* with *Kerio Outlook Connector* preinstalled. Use the tools in this application to display the events in individual categories.
Click the *Categories* button to display the list of default categories. Users can also create new categories that are more suitable.

**Private**

The *Private* item is helpful especially for sharing of folders. If the folder is shared with other users, tasks set as private can be viewed only by their owner (for details, see chapter 1.10.3).

### Co-workers

When a task is created, it can be sent to other people. This feature can be used for several purposes. For example, it might be desired to inform a superior about a task.

Use the *Co-workers* tab in the task's edit dialog box to send the task information to other people (see figure 1.67). The *Co-workers* allows creating of a list of persons to whom an informative email including the task details will be sent when the task is created. The task is sent when created and then again whenever it is updated by the task owner (the initiator). The message is set so that if the co-worker to whom the task was sent uses *Kerio WebMail*, the task can be saved in the task folder and send a confirmative/rejection message at once.

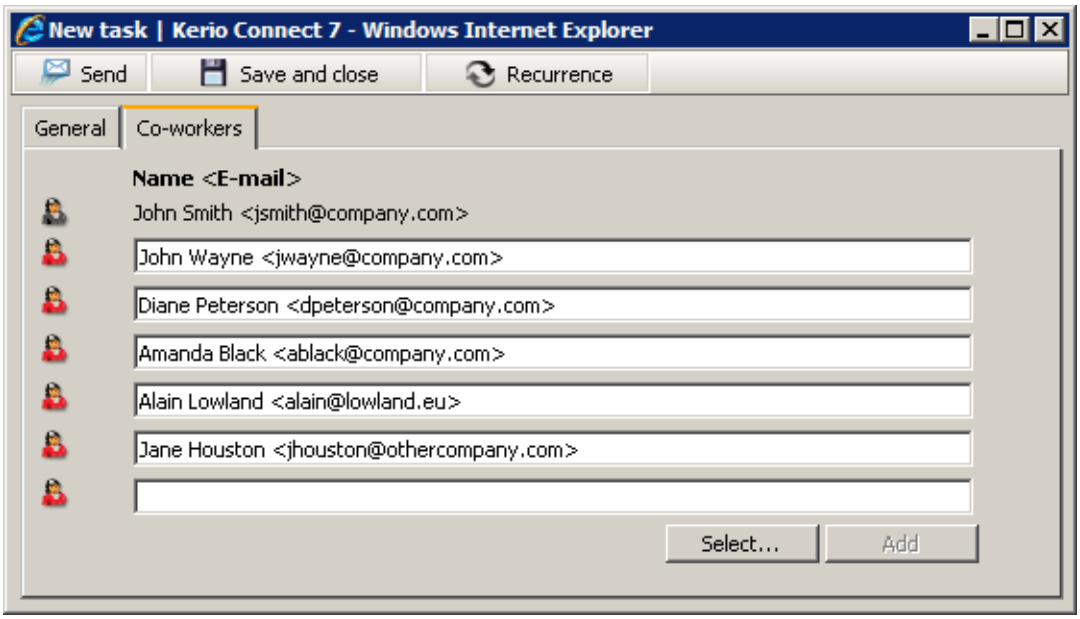


**Figure 1.67** Co-workers

Co-workers and their addresses can be added to the list by the following methods:

- Use the *Select* button to search attendees in contacts. Simply look up and add any co-workers included in your contact folders.

  The dialog allows setting of the following options:

  **Folder**
  The menu includes all contact folders in the mailbox (including public and subscribed contacts).

  **Search for:**
  Enter a string which will be used as search criteria, i.e. any addresses including the string will be searched. First letters of first or second name or username (the part of address preceding the at-sign) can be used as the string. The search string is not case-sensitive.

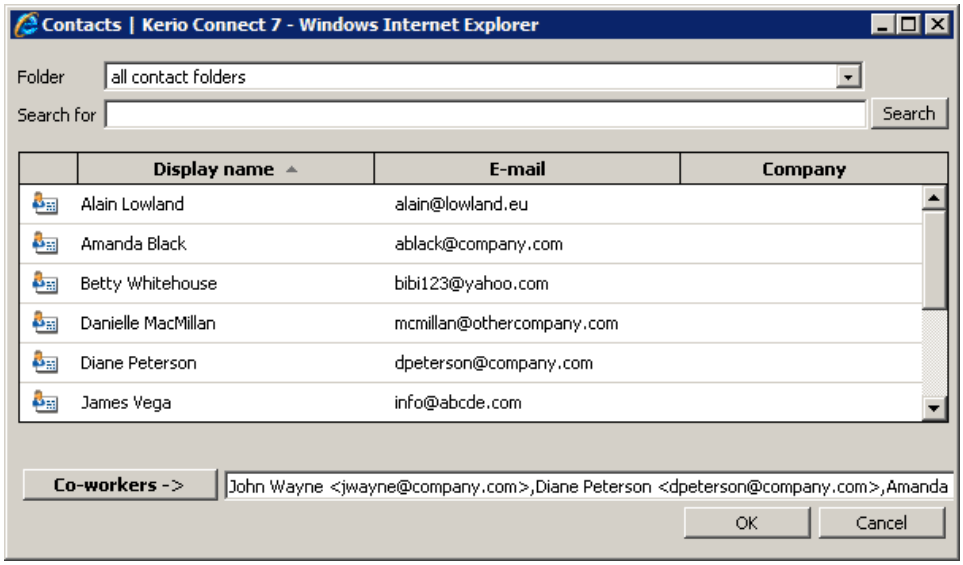


**Figure 1.68** Select

One or multiple addresses can be selected from the list (by clicking on them while holding the `Shift` or the `Ctrl` key) and selected addresses can be added to the co-workers list by the *Co-workers*.

*Note:*
Addresses can be also added to the co-workers list by double-clicking on a particular item.

Once attendees are selected, save settings by the OK button. The dialog is closed and all selected addresses are listed.

- By the *Add* button — use the button to add lines where co-workers can be added by hand. This feature allows add addresses which are not included in any contact folder.

  The *Add* button is not active unless there is at least one line blank where another address can be added. Once addresses are filled in all entries, the button is activated so that another line can be added.

  *Note:*
  Optimally, enter your collaborator using the pattern:
  `Full Name <name@company.com>`
  Actually, the email address will do.

Once addresses are filled in and the task definition is completed, the task can be either saved or sent to co-workers. Co-workers can accept or reject it. Acceptance or rejection status is shown on the *Co-workers* tab (see figure 1.69)

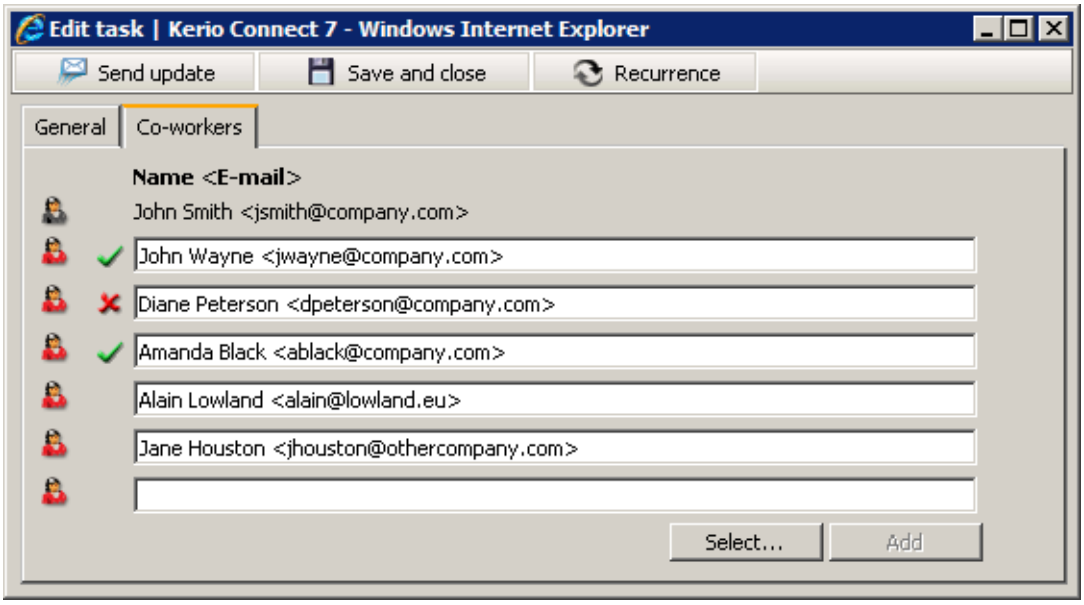


**Figure 1.69** Task acceptance/rejection

### *Task recurrence*

For tasks repeated periodically, it is possible to set repeat mode. The dialog where recurrence can be set is opened by the *Recurrence* icon provided in the upper part of the task edit window.

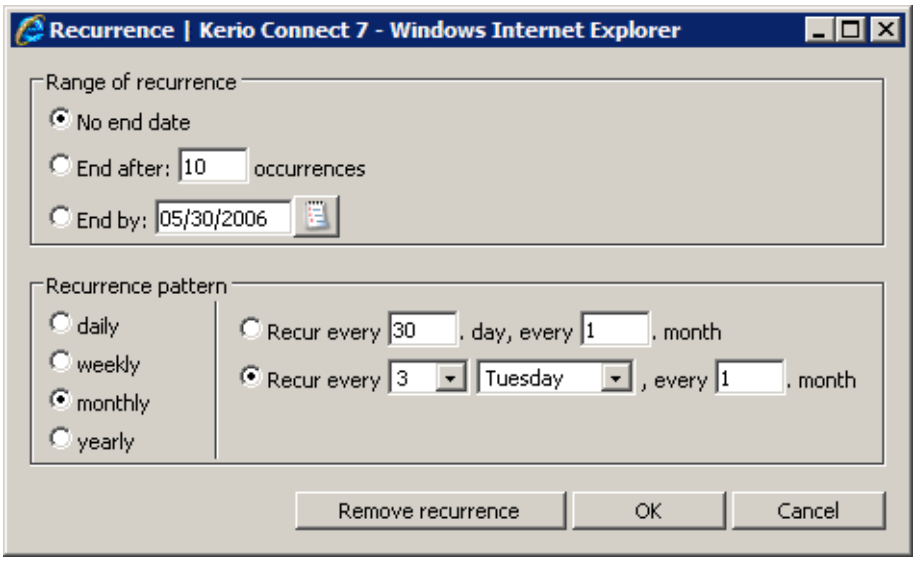


**Figure 1.70** Task recurrence

**Recurrence pattern**

Multiple recurrence patterns are available (*daily*, *weekly*, *monthly*, *yearly*). Each of these patterns has different parameters.

**Range of recurrence**

Set the desired range of recurrence.

- *No end date* — no end date is set.
- *End after ... occurrences* — the recurrence is over when the specified number of recurrences is reached.
- *End by* — recurrences happen in the specified time.

### 1.10.3 Private Tasks

Private tasks are helpful especially for sharing of folders. If the folder is shared with other users, tasks set as private can be viewed only by the folder's owner.

Private tasks can be created as follows:

1. Open the *New task* dialog box.
2. Insert relevant information.
3. On the *General* tab, enable the *Private* option (see figure 1.66).
4. Save changes by clicking *Save and Close*.

***Warning:***
Private tasks are treated as private only if the client where the private task folder is viewed supports this feature. In other client applications, it is possible to view and edit tasks without any restrictions by users with appropriate access rights. This also implies that information included in private tasks are not well secured.

### 1.10.4 Forwarding tasks attached to email

*Kerio WebMail* allows forwarding of tasks in such a format so that it is possible to save it to a task folder. Thanks to this feature we can avoid copying of task data to an email message and to a new task edit dialog box on the addressee's side.

*Kerio WebMail* also supports another option. When a message with an task in the attachment is received, the recipient can simply click on the attachment to open the task in the standard task edit dialog box. Click on *Save and Close* to confirm settings and save the task to the *Tasks* folder.

*Note:*
To save a task or open it as an attachment, right-click on it and use one of the options available, *Open* or *Save*.

### *How to forward a task*

To forward a task, select it by the mouse pointer and click on the *Forward* button on the task folder's toolbar (it is also possible to use the corresponding option in the pop-up context menu).

Select a task and click on *Forward* to open a message editor where the task is included as an attachment.[4] At this point, simply send the email message.

## 1.11 Notes

Note folders in *Kerio WebMail* can be used to record simple notes. In non-digital world, these notes are represented by loads of colorful stickers used as reminders. One of the great advantages of electronic notes is their central storage and the impossibility of losing them.

Individual notes are organized in a table where users can mark them as completed. Each row contains one note, as well as available information about it (see figure 1.71).

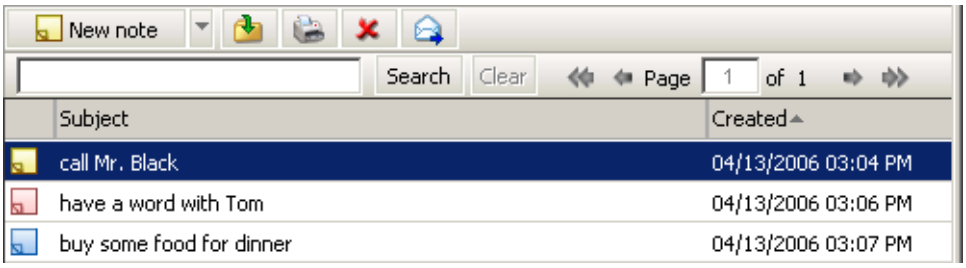


**Figure 1.71** Notes

*Note* folders are equivalent to other folders. They can be shared, set as public or attached. For more information on shared and public folders, see chapter 1.12.

### 1.11.1 Viewing the note list

In *Kerio WebMail*, notes are shown in a list including note names, date of creation and specific colors. Colors can be important. Each color stands for a value. Colors can represent for example topics and areas or levels of importance.

By default, up to 20 notes are listed on one page. To change number of notes displayed on a single page, use the *Settings* section in *Kerio WebMail* (see chapter 1.13.1).

[4] The task will be forwarded in the *iCalendar* format (`.ics`).

### *Sorting notes by columns*

The detailed information on individual notes is displayed in the columns. Each column enables sorting notes by information. Click the column heading to sort notes in the ascending or descending order (see the arrow next to the column name) by alphabet, time or color (depending on the column contents).

*Note:*
For listing by subject, items are sorted by the alphabet of the language set in *Settings* as preferred (the *General* tab) — for details, see chapter 1.13.1. In result, if for example English is set as preferred and subjects are in German, subjects will be ordered by English alphabet and some specific national characters may also cause problems in sorting.

### *Adding and deleting columns*

Users can customize the appearance of the table and the information shown. The columns can be added or deleted. Right-click the table header and specify the column settings in the *Select fields* window. The pop-up menu contains the *Change columns* option. Checked columns will be shown in the dialog box, unchecked columns will be hidden.

### *Adjusting the column width*

The width of the note list can be adjusted. To change the column width, click between two columns in the table header and drag the cursor right or left as needed.

## 1.11.2 Create and edit notes

To create a new note, click on the *New note* option on the toolbar. A simple yellow window is opened. Any text can be written in the note area. The text of the first line is automatically used as the note's subject. To separate this line from others, use *Enter*. The other lines are not displayed in the list.

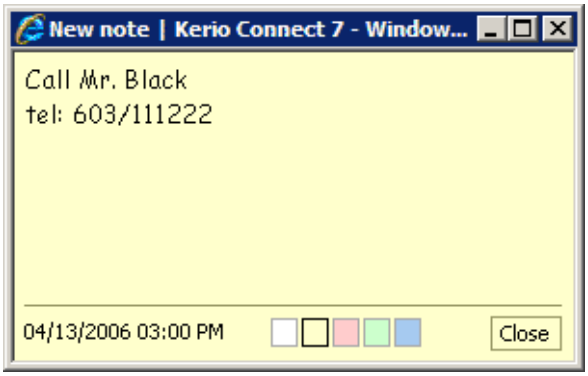


**Figure 1.72** Note

The note dialog also includes date and time of the creation and a color pallet which can be used to select a color for the current note (yellow is used by default).

The note window can be resized. The parameters set will be kept for future. This means that the window's size and position will be kept for the next time the note is opened.

When finished, save the note by the *Close* button (see figure 1.72).

### 1.11.3 Forwarding notes attached to email

*Kerio WebMail* allows forwarding of notes in such a format so that it is possible to save them to notes folders. Thanks to this feature we can avoid copying of the note data to an email message and to a new note edit dialog box on the addressee's side.

*Kerio WebMail* also supports another option. When a message with an note in the attachment is received, the recipient can simply click on the attachment to open the note in the standard note edit dialog box. Click on *Close* to confirm settings and save the note to the default personal *Notes* folder.

*Note:*
To save a contact or open it as an attachment, right-click on it and use one of the options available, *Open* or *Save*.

The attachment with the note is sent in a special proprietary format which can be used only in *Kerio WebMail* or *MS Outlook* extended by the *Kerio Outlook Connector*. In other types of email clients the note is displayed only in HTML.

#### *How to forward a note*

To forward a note, select it by the mouse pointer and click on the *Forward* icon on the note folder's toolbar (it is also possible to use the corresponding option in the pop-up context menu).

Select a note and click on a corresponding icon to open a message editor where the note is included as an attachment. At this point, simply send the email message.

## 1.12 Folder Administration

*Kerio WebMail* includes a folder tree which is the basic tool for maintenance of folders (see figure 1.73). The easiest way to work with individual folders is to use the context pop-up menu where folders can be created, removed, user access rights can be set, etc.

Folders displayed in *Kerio WebMail* can be categorized either by their user access rights or by type.

Classification by types:

- Email — the folder where email messages can be kept and maintained.
- Contacts — in such folders, contacts can be kept and maintained.

- Calendar — in such folders, events can be kept and maintained.
- Tasks — in such folders, tasks can be kept and maintained.
- Notes — a folder where notes can be kept.
- Root folder — the basic folder. For detailed information on this folder, see section 1.12.1.

Classification by user access rights:

- The default personal folders — all folders created within the first logon. Unlike the other folders, these ones cannot be removed. The default personal folders include for example *Inbox*, *Junk E-Mail*, *Drafts*, *Contacts*, *Notes*, etc.
- Personal folders — personal folders also include default folders. They include any folders and subfolders which cannot be accessed by other users.
- Public folders — special folders which are, by default, available to all users of the particular domain or of any *Kerio Connect* domain (this depends on server settings). Public folders can be handled only by users with special privileges. These privileges can be assigned by the administrator in the *Kerio Connect* administration interface. For details on public folders, refer to section 1.12.5.
- Shared folders — any folders which can be accessed by other *Kerio Connect* users with appropriate rights (for details, see section 1.12.5).
- Subscribed folders — folders owned by another user which are shared and can be viewed, edited or administered by the current user (depending on special rights assigned by the owner). For details on subscription of folders, refer to section 1.12.6.

### 1.12.1 Root folder

The root folder is the primary folder on the top level in the folder tree. Its default name usually consists of the username and the domain (see figure 1.73). Root folder is accessed through the pop-up context menu opened by right-clicking (see figure 1.73):

**New folder**
Use this option to create a new folder.

**Rename**
The root folder can be renamed.

**Subscribe shared folders**
This option allows connecting to the folders shared by other users (for detailed information about subscribing, refer to chapter 1.12.5).

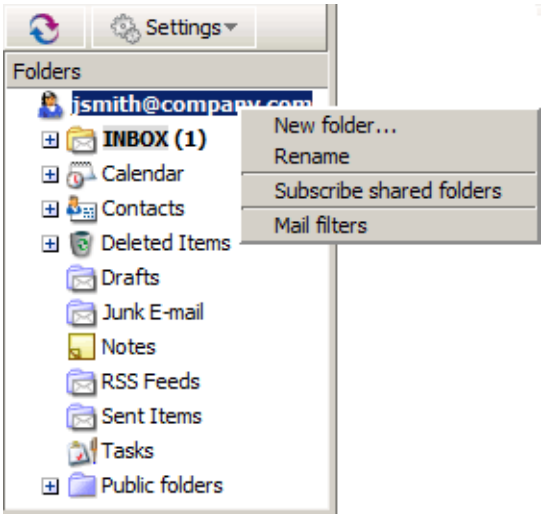


**Figure 1.73** Context menu of the root folder

**Mail filters**

In *Kerio WebMail*, it is possible to create filtering rules for the incoming messages. For detailed information about filtering rules, refer to chapter 1.14.

### 1.12.2 Creating folders

Any new folder is created as a subfolder of an existing folder. To create a folder on the top level, create it as a sub-folder of the root folder. The root folder is the primary folder on the highest level (the name of the root folder is the same as the user's email address). The root folder also can be renamed.

The following steps must be taken to create a new folder:

1. First, select the superior folder and right-click on it.

   It is recommended to use the same folder types for all subfolders. In other words, email folders should be created as subfolders of other email folders (and not under a calendar folder), for example. These rules keep the folder tree well-organized and comfortable.

2. In the folder's pop-up menu just opened, click on *New subfolder* (see figure 1.74).

3. In the dialog just opened, specify name of the folder and select its type:

   - *Email* (for storage of email messages)
   - *Contacts* (where user personal information is kept)
   - *Calendar* (management of events and meetings)
   - *Notes* (storage and management of sticky notes)
   - *Tasks* (management and storage of tasks)

Once the dialog is confirmed, the new folder is added to and displayed in the folder tree.

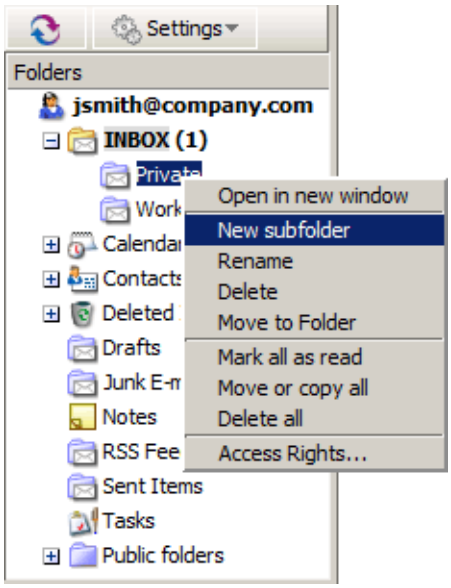


**Figure 1.74** Folder's pop-up menu

### 1.12.3 Folder tools

In section 1.12.2, instructions for creation of a new folder have been provided. This section lists and describes actions which can be applied to folders:

#### *Rename folders*

Folders can be renamed through their pop-up menu, as follows:

1. Select a folder to be renamed and right-click on it.
2. This opens the folder's pop-up menu (see figure 1.75).
3. Click on *Rename*.
4. A dialog is opened where the item can be renamed. Enter a new name and confirm changes by the *OK* button.

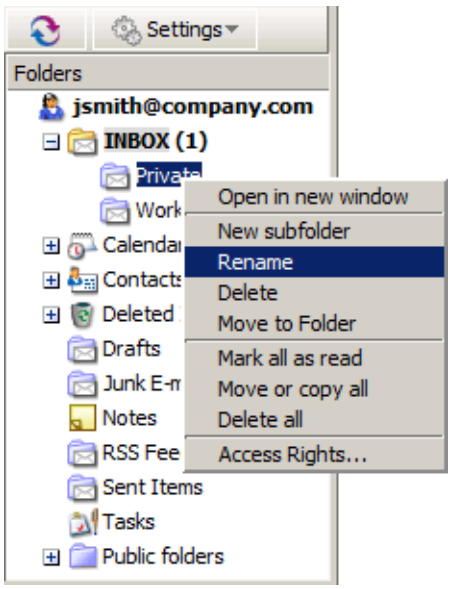


**Figure 1.75** Folder's pop-up menu — Rename

*Note:*
For technical reasons, it is not possible to rename default personal folders. Therefore, the *Rename* option is not available in their pop-up menu.

### *Remove folders*

Folders can also be removed, as follows:

1. Select a folder to be removed and right-click on it.

2. This opens the folder's pop-up menu (see figure 1.76).

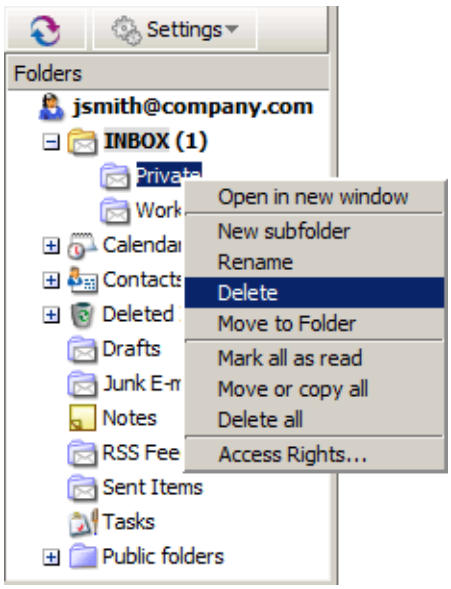


**Figure 1.76** Folder's pop-up menu — Remove

3. Click on *Remove*. *Kerio WebMail* asks if you really want to remove the folder. Once confirmed, the folder is either moved to *Deleted Items* or it is removed immediately. This depends on settings of the *Delete messages permanently* option in *Kerio WebMail* (for details on user settings, see chapter 1.13.1).

*Note:*
For technical reasons, it is not possible to remove default personal folders. Therefore, the *Removed* option is missing in their pop-up menu.

### Move folders

Folders can be moved within the folder tree either through the pop-up menu or by using the Drag & Drop method:

- Drag & Drop

  1. Select a folder to be moved.

  2. Click on the folder.

  3. Hold the mouse button and drag it over the folder to which the selected item will be moved. When a green icon appears at the pointer, let hold of the mouse button to move the folder (see figure 1.77).

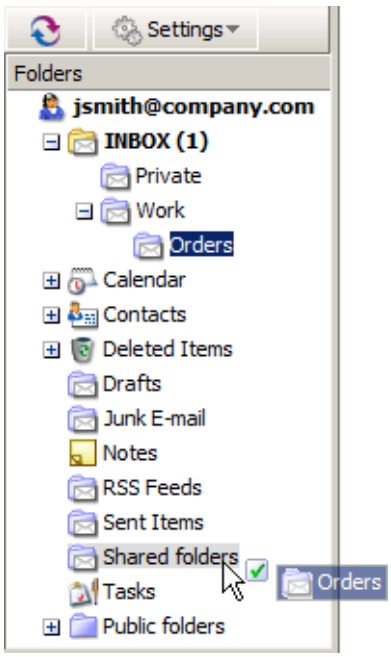


**Figure 1.77** Moving folders by the Drag & Drop method

*Note:*
Unless the folder is dragged over a folder where it can be moved, a red icon is displayed meaning it is impossible to move the message to the particular location.

- Pop-up menu

  1. Select a folder to be moved.

  2. This opens the folder's pop-up menu (see figure 1.76).

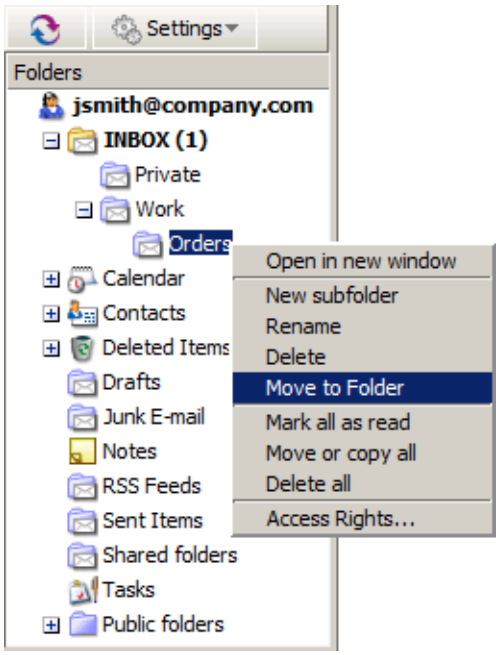


**Figure 1.78** Folder's pop-up menu — Move

  3. Click on *Move*.

  4. In the dialog just opened, select a folder to which the item will be moved.

  5. Click *OK* to confirm the action.

  *Note:*
  For technical reasons, it is not possible to move default personal folders.

### 1.12.4 Folder content options

Folder pop-up menu includes several tools for group manipulation with all items included in the particular folder:

### Mark all as read

The *Mark all as read* option is available only in pop-up menus of email folders.

It can be helpful in the following cases:

- the function of marking shown read messages as read is disabled (messages are not marked as read once shown in the message-reading pane),
- a separate window is used for message reading (messages are not marked as read once shown there).

To mark all unread messages as read, follow these instructions:

1. Click on the folder with the right mouse button.
2. This opens the folder's pop-up context menu.
3. Click on *Mark all as read*.

### Move or copy all

This option can be used to copy or move all messages included in a particular folder. This option is available for all folder types.

To copy or move all items from one folder to another, follow these instructions:

1. Right-click on the folder to open its pop-up menu.
2. In the pop-up menu, click on *Move or copy all* (see figure 1.79).

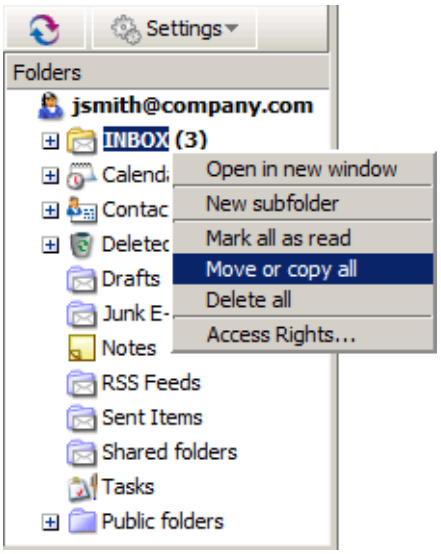


**Figure 1.79** Pop-up menu — Move or copy all

3. In the move-or-copy dialog just opened, select the destination folder, i.e. the folder to which the items will be moved.

> ***Warning:***
> Items can be moved or copied only between folders of the same type. This implies that it is not possible to copy or move for example email messages to a calendar folder, tasks to a note folder, etc.

4. Once the destination folder is selected, click on *Move* or *Copy*, depending on the action you want to take.

### *Delete all*

The *Delete all* option removes all items included in the particular folder. This covers regular items, such as messages, contacts, tasks, events and notes, as well as all subfolders. This option is available for all folder types.

To delete all items in a folder, follow these instructions:

1. Right-click on the folder to open its pop-up menu.

2. In the pop-up menu, click on *Delete all* (see figure 1.80).

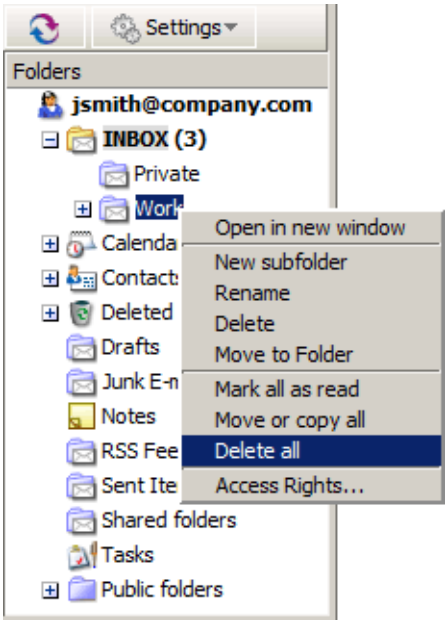


**Figure 1.80** Pop-up menu — Delete all

3. *Kerio WebMail* asks if you really want to remove the folder content. Once confirmed, the folder content is either moved to *Deleted Items* or it is removed immediately. This depends on settings of the *Delete messages permanently* option in *Kerio WebMail* (for details on user settings, see chapter 1.13.1).

### 1.12.5 Shared and public folders

*Kerio Connect* enables creation of shared and public folders. A shared folder is any folder of any user who has decided to share it with other users (or group of users, domain, etc.) and grant specific rights to them.

Public folder is a special type of shared folder. This folder is automatically available for reading to all users of the domain or of *Kerio Connect*.[5]

All public folders you have been granted reader, editor, or administrator rights to, will automatically appear as subfolders of *Public folders*.

#### *Creating a shared folder*

Each user can grant other users rights to any of his/her folders (we recommend careful consideration of this action — for example granting another user rights to the user's *INBOX* folder could have adverse implications).

Define access rights in the *Folder Sharing* dialog box which is opened upon right-clicking on a selected folder.

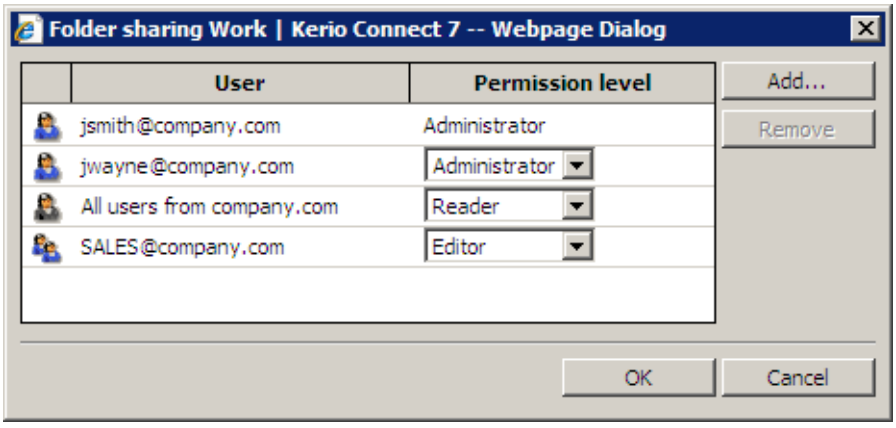


**Figure 1.81** Folder sharing

[5] This depends on the server settings (see Kerio Connect, Administrator's Guide).

Click on *Add*. In the *Add Sharing* dialog just opened, specify type of sharing.

Folders can be shared with various subjects.

- *User* — a particular user. Enter username (in case that the user belongs to the same domain as the sharer) or username with domain in the `username@domain` pattern (e.g. `jgraham@company.com`) if the user does not belong to the same domain.
- *Group* — a particular group. Use the entry to specify group name with the domain included in format `group@domain` (e.g. `sales@company.com`). Domain must be included in name specification whenever rights are to be assigned to the group from another domain.
- *All users from domain* — specify the *Domain* entry with the particular domain name.
- *All users* — special type of access rights. The folder can be subscribed (for more information on account mapping, see chapter 1.12.5) by all users with accounts in *Kerio Connect*.
- *Anonymous access* — special type of access rights. The folder can be subscribed by all users including those who have no account in *Kerio Connect*. This type of access rights is useful especially for publishing of calendars in the iCalendar format.

  Folders with anonymous access can be also accessed by special scripts.

To set user rights, select one of the options from the *Permission level* pull-down menu:

- *Administrator* — the user can read the folder as well as share it with other users and remove items in the group or the group itself. This user is not allowed only to remove access rights for the user who created the group.
- *Editor* — the user can edit items in the folder (add and remove items, etc.).
- *Reader* — the user is allowed only to read the folder's items. No editing is allowed.

*Note:*
Username is required when access rights to a particular user or group are being set. The selection of a user or a group from the list is not available for security reasons. It is not recommended to allow a common user to access the list of all users.

Sharing can be disabled by marking a particular line in the list and clicking *Remove*.

Once the folder is shared, save changes by clicking on *OK*.

If sharing is correctly set, the shared folder will be marked as shared (see the *Jokes* folder in the image 1.82), so that the user knows which of his/her folders has been shared to other users.

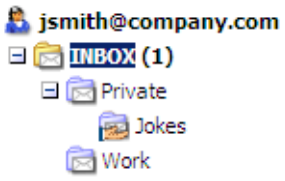


**Figure 1.82** Shared folder

### 1.12.6 Folder subscription

Shared folders can be subscribed in *Settings* → *Subscribe shared folders* (see figure 1.83). Click *Subscribe shared folders* to open the dialog to enter the username of the person whose folder you want to subscribe to. This person must have an account in *Kerio Connect*, otherwise the subscription will not work.

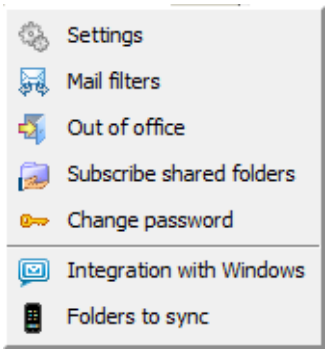


**Figure 1.83** Settings Menu

If the username has been entered properly and the user has decided to share a folder with you, a dialog box with a list of shared folders will be opened. Check the folder to subscribe to a specific folder; clear the checkbox to unsubscribe.

**Figure 1.84** Folder Subscription Dialog

### 1.12.7 Folder synchronization with mobile devices

Folder synchronization with mobile devices which support the *Exchange ActiveSync* protocol can be set in the *Settings* → *Folders to sync* menu.

In the opened dialog, select the folders you want to synchronize (see figure 1.85) and confirm by clicking on *OK*.

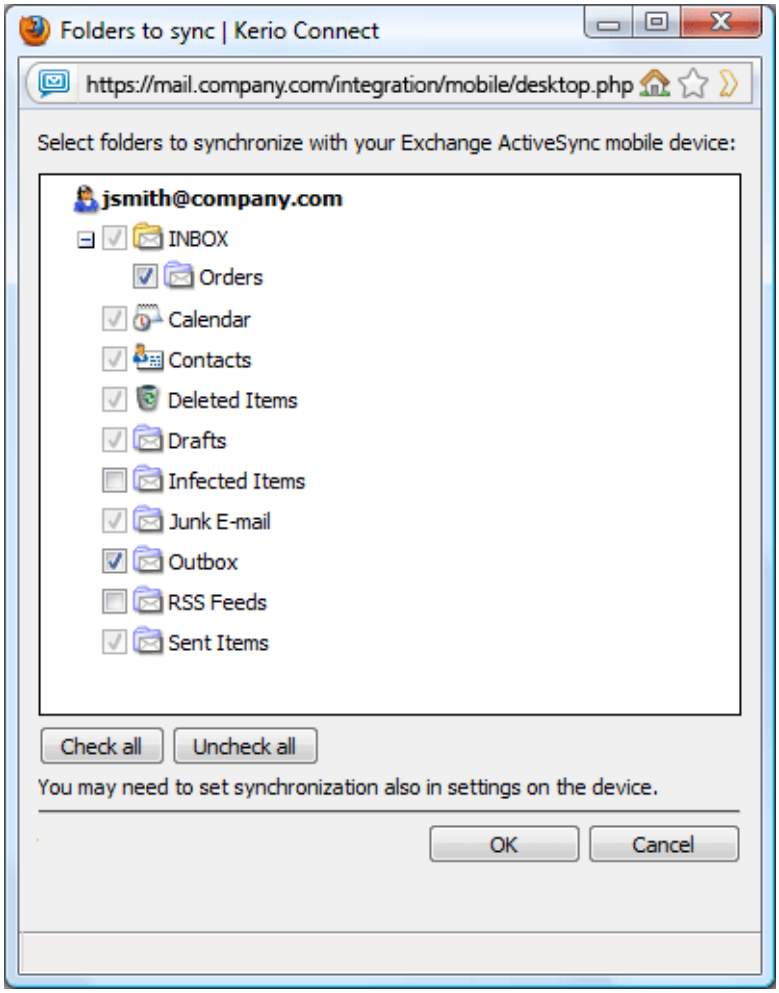


**Figure 1.85** Folder synchronization with mobile devices dialog

***Warning:***
For information about which folders can be synchronized with your device, refer to the product's user guide or the producer's documentation for that particular device.
Some mobile devices require synchronization settings in their own configuration.
More information on data synchronization with mobile devices can be found in section 4.

## 1.13 Kerio WebMail configuration

In addition to working with messages in folders, the *Kerio WebMail* interface also enables various settings. These changes can be performed in the *Settings* menu available via the *Kerio WebMail's* toolbar (see figure 1.86).

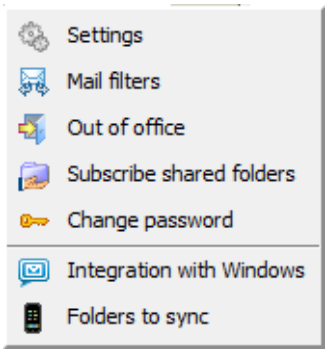


**Figure 1.86** User settings menu

### 1.13.1 User Settings

*Kerio WebMail* customization is enabled via the first item in the *Settings* menu. This opens a dialog divided into several tabs:

#### *General*

The *General* tab contains basic user settings for the *Kerio WebMail* interface:

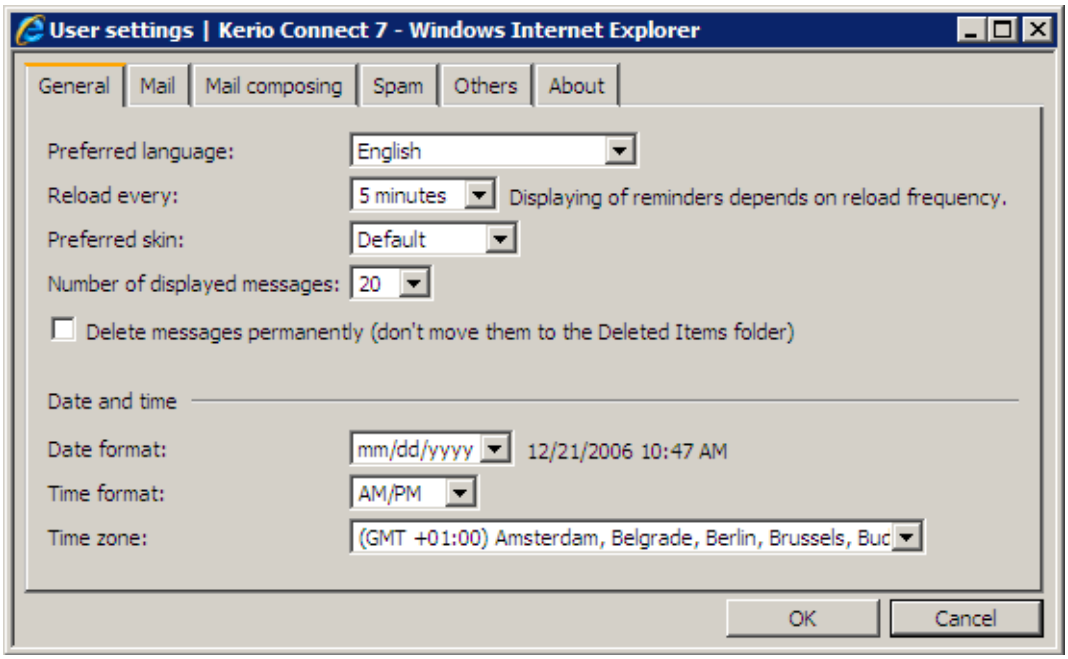


**Figure 1.87** User settings — General tab

**Preferred language**

Selection of a language for the *Kerio WebMail* interface. The *Browser detected* option sets a language in correspondence with settings of the particular client (i.e. of the web browser or the system where the browser is running).

*Note:*

All items, such as messages, contacts, events and tasks, in all folder types will also be sorted by the alphabet of the language set as preferred. In result, if for example English is set as preferred and subjects are in German, subjects will be ordered by English alphabet and some specific national characters may also cause problems in sorting.

**Reload every**

This option controls the folder tree restore and reminder display.

**Preferred skin**

Skin of the interface can be set in the menu. Save the settings to switch to activate the new skin.

**Number of displayed messages**

Use this option to set the number of messages that will be displayed in the message list. This option applies also to number of events, contacts, tasks and notes which will be displayed at one page.

**Delete messages permanently**

Enable this option if you want that items deleted by the `Delete` key are removed right away instead of moved to *Deleted Items*.

The settings apply to all folders save *Deleted Items* and *Junk E-mail*. Items in these two folders are always removed for good.

**Date format**

Selection of the date display. The date form follows this pattern: dd — day, mm — month, yyyy — year.

**Time format**

Set time format which will be applied to time display in all folders.

**Time zone**

Time zone settings are based on *Kerio Connect* by default. Users can re-define the time zone, if they plan to use *Kerio WebMail* in a time zone different from the server location. These settings are especially useful in communication with people located in a different time zone. The communication will not be complicated by an incorrectly specified time of meeting or message.

If *Kerio WebMail* is opened in a browser with a different time zone, a dialog box appears with an information that the browser time zone has changed and a question whether you want to change the *Kerio WebMail* time zone. This is necessary for correct conversion of time zones in *Kerio WebMail*.

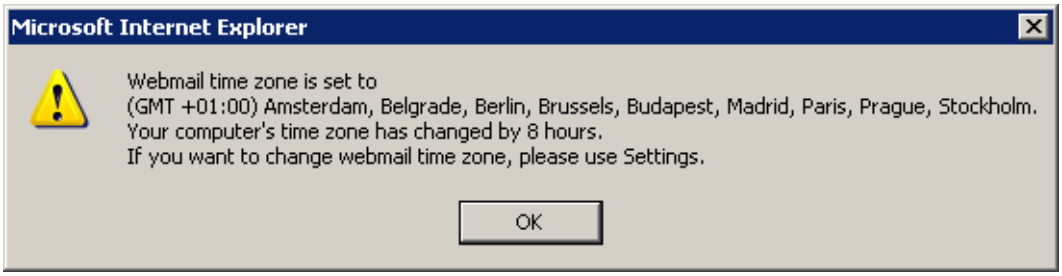


**Figure 1.88** Warning

Time zones are described in more detail in chapter 1.15.

### *Email*

Use the *Mail* tab to set parameters for mail folders. Mail folders are described in detail in chapter 1.6.

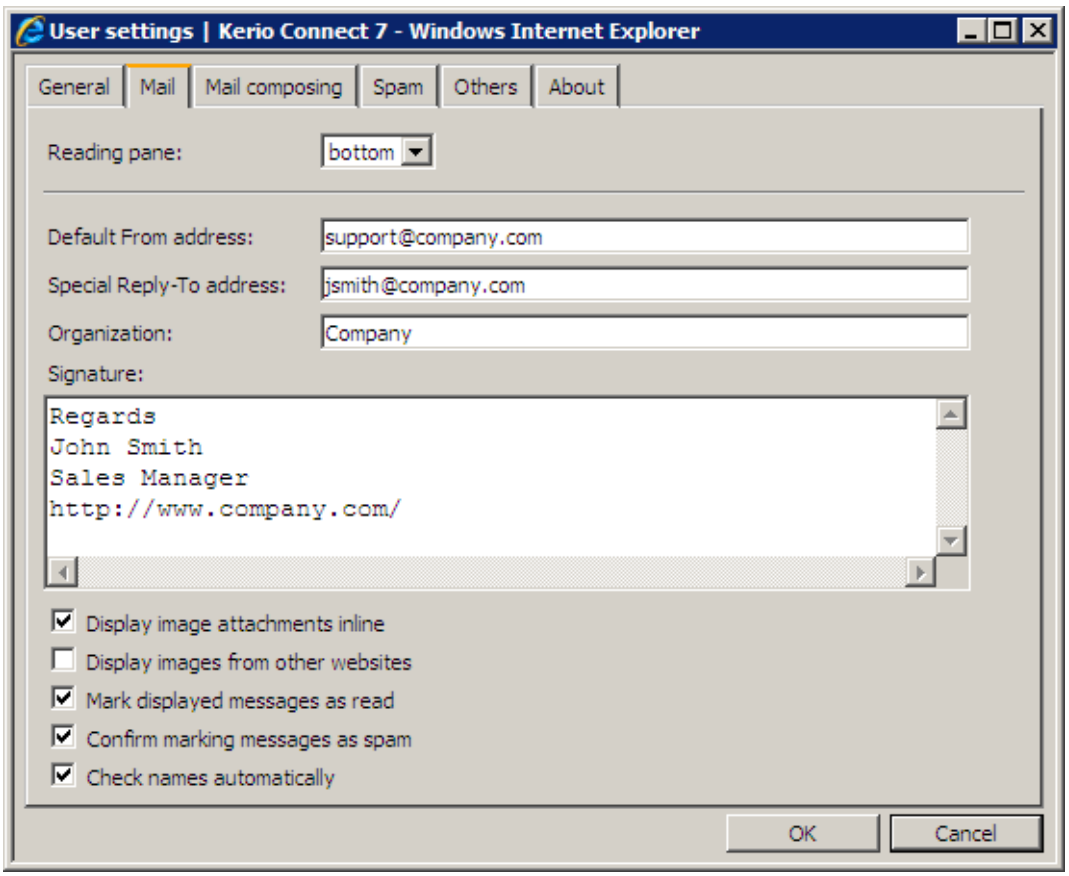


**Figure 1.89** User settings — Mail tab

**Reading pane**
This type of window is available in mail folders only. It is an area where the body (text) of the message is displayed. The subwindow can be positioned either on the right or at the bottom of the active window or it can be hidden.

**Default sender address**
The email address from which the messages are sent.

**Address for replies**
Address to which replies will be sent (the `Reply-To:` item).

**Organization**
Name of the company is included in the message as the `Organization:` header.

**Signature**
The signature added automatically to all messages sent from the *Kerio WebMail* interface (including replies and forwarded messages).

**Display image attachments inline**
The image attachments (GIF, JPEG) can be displayed directly in the message body. If this option is unchecked, only a hyperlink to the image is displayed. If you are connected to the *Kerio WebMail* interface via a slow line (e.g. modem), we recommend not to enable this option.

**Display images from the web**
Each message with HTML body can contain links to images stored on the remote server. If this option is enabled, the images will be downloaded from the server. This way, active mailboxes can be identified easily (and misused for the purpose of sending spam messages). Your computer can be also attacked due to browser security errors. For security reasons, it is recommended to leave this option inactive.

**Mark displayed messages as read**
For better reference, new messages which have not been read yet are bold. If the *Mark displayed messages as read* option is enabled, new messages are marked as read when opened. Read messages in the message list are not displayed bold any more. This option is enabled by default. If you do not want the messages to be marked as read upon opening, clear this option.
*Note:*
Use the pop-up menu of a selected message to mark it as read/unread.

**Confirm marking messages as spam**
Use this option to enable/disable the confirmation dialog box.

**Automatic checks of address**
When recognized, the address of the recipient is filled out automatically upon entering, after the pointer is moved into other field. If there are more addresses that start with the string specified, the window with all appropriate addresses is opened.
The search is performed in all folders set on the *Mail composing* tab. By default, the default private and public Contact folders are scanned.

### *Message writing*

Use this tab to set some of the parameters for message sending.

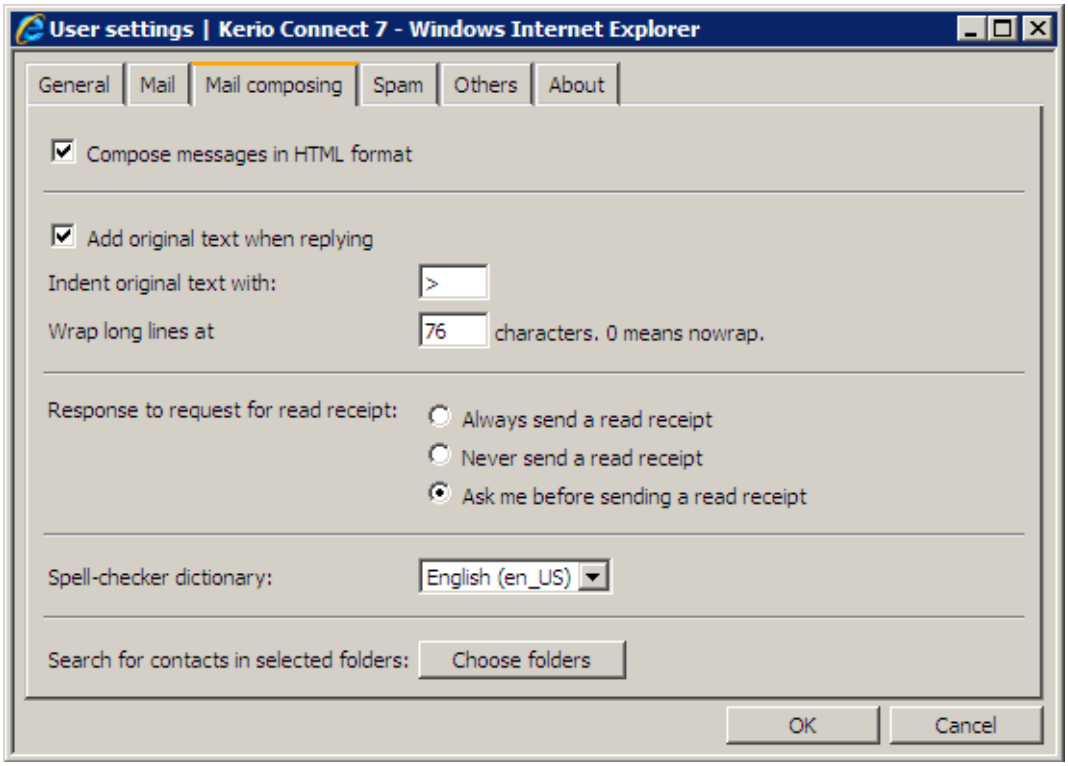


**Figure 1.90** User settings — Mail composing tab

**Compose messages in HTML format**

This option is checked by default. The message text cannot be formatted, if the message is not composed in HTML format (see chapter 1.6.3). This setting applies to all messages. Messages can be also composed in HTML format (or in the plain text format) by default and you can use the other alternative only when needed. To specify this setting for a selected message, use the *Options* dialog in the message editor (see chapter 1.6.3). This applies only to the selected message; the default settings are not changed.

> ***Warning:***
> In Safari, it is not possible to compose HTML messages. Therefore, the *Compose messages in HTML format* option is missing for this browser.

**Add original text when replying**

Use this option, if you want to include the original message in your reply. You can also select the character that will appear before each line of the original message. These characters are used to differentiate graphically the original message from the reply.

The line wrap function facilitates the reading of messages. The value of 76 characters is set as default. If the value is set to 0, the text will not be wrapped.

**Response to request for read receipt**

Use this option to specify what will happen to a delivered message that requires reading confirmation. It is recommend to select the *Ask me before sending aread receipt* option, because users can decide according to the importance of the message whether the confirmation should be sent or not.

**Spell checker dictionary**

Selection of the spellcheck dictionary language. When you use the dictionary for the first time, the spellcheck may take longer, since the dictionary is loaded into the memory.

**Search for contacts in selected folders**

Check this option to speed up searching for contacts. The search engine goes through selected folders only.

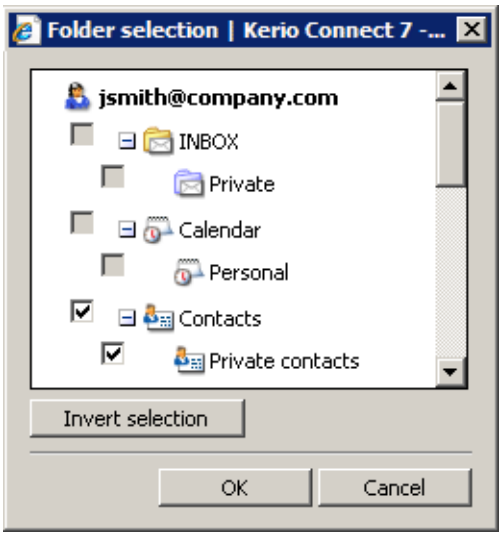


**Figure 1.91** Folder selection

### *Spam*

The *Spam* tab contains several options to get rid of unsolicited email:

**Move spam to the Junk E-mail folder**

Check this option to move all recognized unsolicited email directly to the *Junk Email* folder.

This option also enables adding email addresses to the list of trustworthy users (see below).

**Do not treat messages as spam... (Spam whitelist)**

The spam filter may mark even solicited message as spam, if it bears some spam characteristics. So called *Spam whitelist* enables to define senders who will not be considered as spammers by any means. Their messages will not be marked as spam.

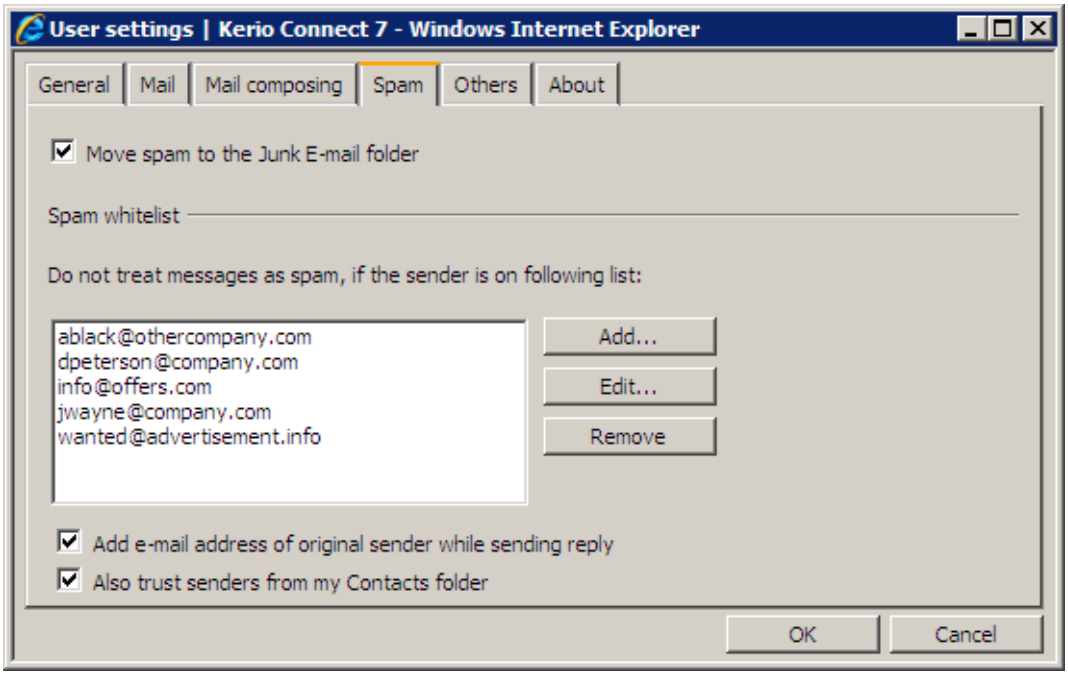


**Figure 1.92** User settings — Spam tab

**Add e-mail address of original sender...**

Upon each reply, the email address of the particular sender now becoming an addressee is added to the "Spam whitelist" automatically.

This option determines that any email message replied is considered as non-spam. Any other messages sent from such addresses are automatically considered as non-spam.

**Also trust senders from...**

If this option is enabled, messages marked as spam which were sent from addresses included in the default contact folder are not moved to the *Spam* folder.

This option supposes that email addresses in one's contact list are trustworthy. This option simplifies whitelist definition.

For details about spam, see chapter 1.6.5.

### *Others*

The *Others* tab enables users to customize this page. For details about the "Today" page, see chapter 1.4.

*Today*

**After login**

This option makes the "Today" window open after user login to the *Kerio WebMail* interface.

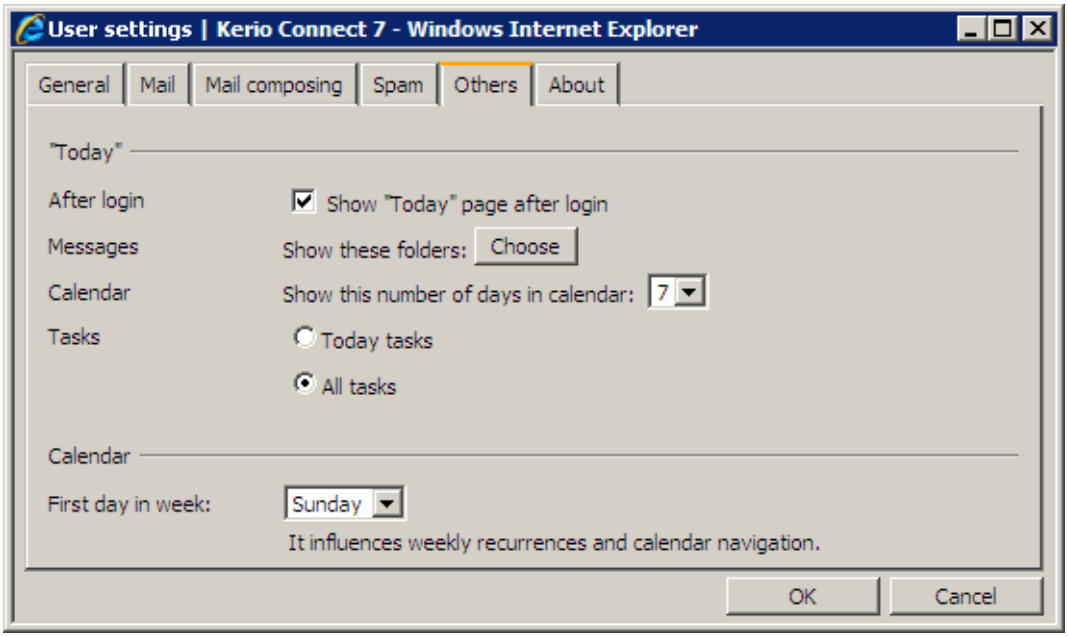


**Figure 1.93** User settings — Today tab

**Messages**

You can click on *Choose* to select email folders which will be showed in the Today page.

**Calendar**

Use this option to specify the number of days displayed on one page of the calendar folders.

**Tasks**

On the "Today" page in the *Tasks* section, users can specify whether only the tasks that are due today (*Today tasks*) or all uncompleted tasks (*All tasks*) will be displayed.

*Calendar*

**First day in week**

This setting takes effect in *Kerio WebMail* in two cases:

- Thumbnail calendar in calendar folders — if Sunday is set as the first day of the week, weeks in thumbnail calendars start with Sundays. Consequently, if Monday is set as the first day of the week, weeks in thumbnail calendars start with Mondays (see figure 1.94).

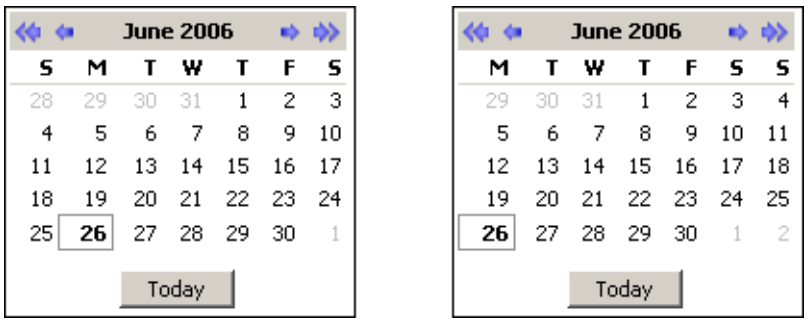


**Figure 1.94** Comparison of thumbnail calendars

- Weekly recurrence period applied to events and tasks — setting of the first day in the week takes effect only in a specific case which will be better understood through an example:
  Every two weeks, on Sundays and Wednesdays, in the evening, Mr Jonathan Flykiller meets friends to play chess. He uses recurrent events in his calendar to remind him of these meetings. The events are set as follows:

  1. Mr Flykiller opens a new event in the calendar and sets date and time (`September 6` from `6.30 PM` to `8.30 PM`) and sets the subject name for `Chess` (see figure 1.95).

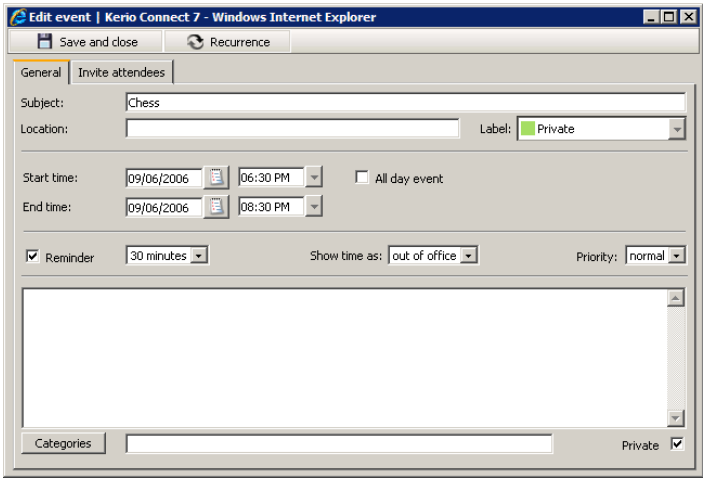


**Figure 1.95** Event settings

  2. Weekly recurrence is set to once-a-two-weeks recurrence on Wednesdays and Sundays (see figure 1.96).

  Now, let's see how this recurrent event is shown in a calendar where Sunday is set as the first day of the week and compare it to the case where Monday is set as the week-starting day. The difference can be understood through figure 1.97 (the green event was created when Monday was set as the week-starting day while the red events were created when Sunday was set as the first day of the week).
  If Monday is set as the week-starting day, Wednesday and Sunday are included in the same week.
  If Sunday is set as the week-starting day, only Wednesday is marked in the first week since Sunday, September 10, already belongs to the following week. The following weeks start with Sunday (starting on September 17 at figure 1.97) as

set in the parameters.

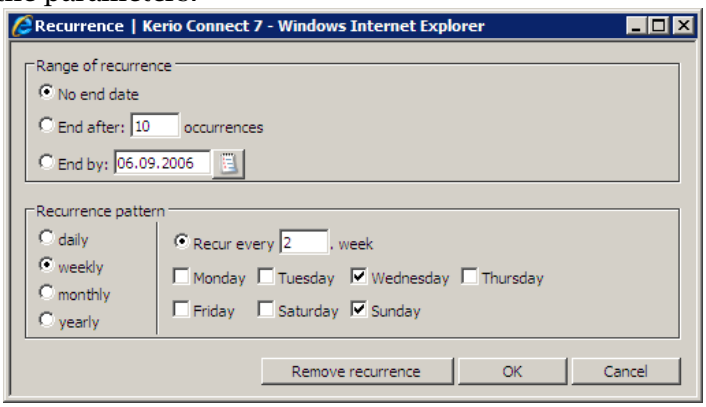


**Figure 1.96** Setting recurrence

| Monday | Tuesday | Wednesday | Thursday | Friday | Saturday/Sunda |
|---|---|---|---|---|---|
| **28. August** | **29** | **30** | **31** | **1. September** | **2** |
| | | | | | **3** |
| **4** | **5** | **6**<br>06:30 PM: Chess<br>06:30 PM: Chess | **7** | **8** | **9** |
| | | | | | **10**<br>06:30 PM: Chess |
| **11** | **12** | **13** | **14** | **15** | **16** |
| | | | | | **17**<br>06:30 PM: Chess |
| **18** | **19** | **20**<br>06:30 PM: Chess<br>06:30 PM: Chess | **21** | **22** | **23** |
| | | | | | **24**<br>06:30 PM: Chess |
| **25** | **26** | **27** | **28** | **29** | **30** |
| | | | | | **1. October**<br>06:30 PM: Chess |

**Figure 1.97** Comparison of calendars with different week-starting days

*Note:*
If settings of the starting day of the week are changed, settings of existing events does not change.

### 1.13.2 Out of office

The *Out of office* rule allows setting of automated responses to incoming messages.

This automatic reply can be enabled when a user cannot reply messages him/herself (e.g. when the user is ill or on vacation). It is usually helpful when the user is supposed to reply immediately.

Automated reply can be set in the *Settings* → *Out of office* toolbar menu. In the out-of-office dialog, switch to the *Send Out of Office messages* mode and enter a message which will be sent to incoming messages. Thus, senders know immediately that the user cannot send them any

answering message at the moment. Optionally, you can set start and end time and date for sending of automatic messages.

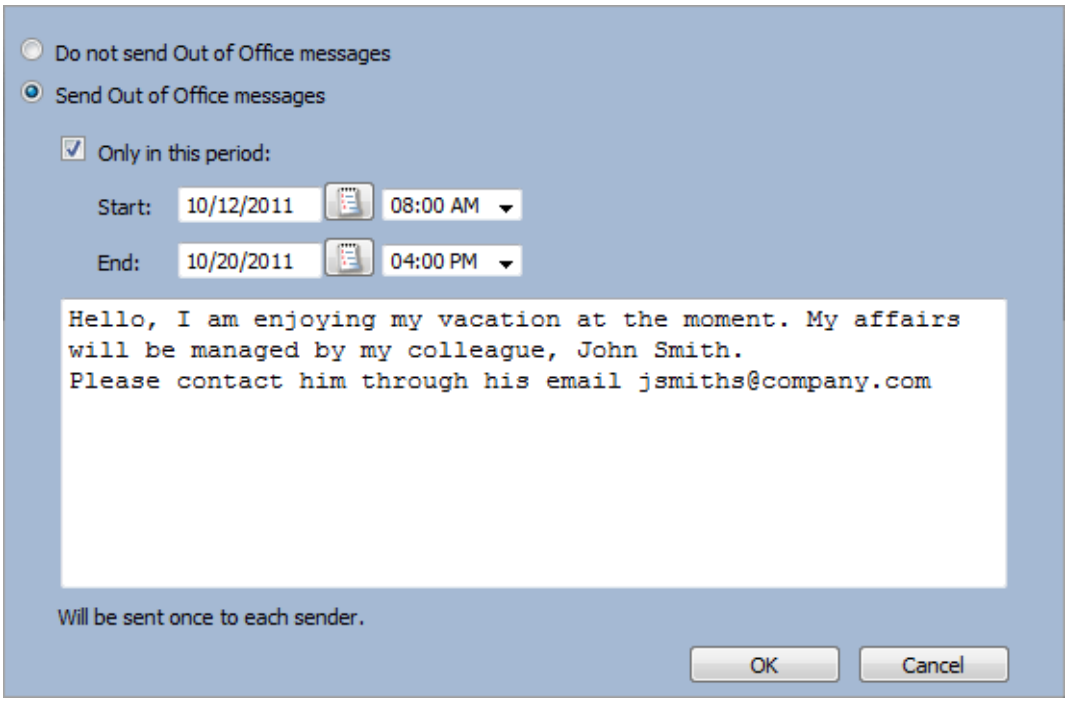


**Figure 1.98** User settings— Out of office tab

Automatic replies are defined by a rule applied to incoming email (the rule is saved in *Kerio Connect*). These rules as well as their definition are focused in chapter 1.14.

The *I'm out of office* rule consists of the following items:

- *Condition:* The rule will apply to all incoming messages except email sent from mailing lists. The automatic answer is not sent where answering to another automatic email (this should prevent users from email loops).
- *Action:* The text entered will be sent to each sender's address included in an incoming message only once a seven days.

***Warning:***
Before enabling the *Out of office* rule, it is recommended to enable also the *Spam* rule to make sure that automatic replies are not sent to spammers. If the *Spam* rule is not enabled, your address will be exposed to spammers who try to send their spam messages to randomly generated addresses and later use those addresses from which they get an answer (so that they are sure the address exists and start to send even larger volumes of spam messages to it).

### 1.13.3 Change of password

Password can be changed directly in the *Kerio WebMail* interface, without the need to contact the network administrator.

Use the *Change password* option in the *Settings* menu of the toolbar.

For security reasons, it is necessary to use the secured HTTP for connecting to *Kerio WebMail*. The beginning of the URL address must be entered as follows:

```
https://
```

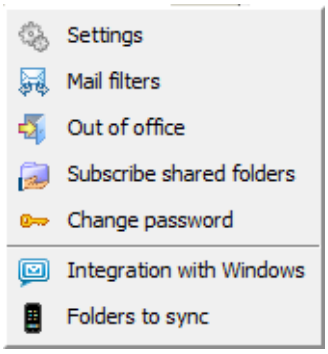


**Figure 1.99** Settings Menu

> ***Warning:***
> If you use the unsecured version of HTTP protocol, the password cannot be changed in the application.

The dialog contains only three fields to specify the old and the new password. The new password must be entered twice, in order to eliminate typing errors. If the password contains special (national) characters, users of some mail clients will not be able to log in to *Kerio Connect*. It is therefore recommend to use only non-diacritic characters for passwords.

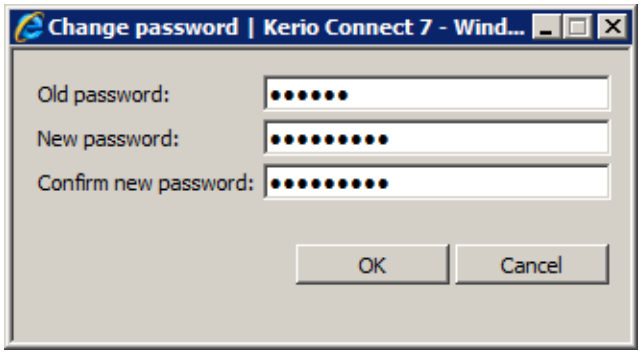


**Figure 1.100** Change password

***Warning:***
If a user connects to an account which is mapped from the *Apple Open Directory* and they authenticate against the password server, the password cannot be changed.

### 1.13.4 Integration with Windows/Mac OS X/Linux

*Integration with Windows/Mac OS X/Linux* is a handy tool that helps use *Kerio Connect* and its features even more effectively and in a more comfortable way. It is actually a web page where you can find for example download links for client extensions and URLs of your calendars which can be used for connection via the iCal and CalDAV protocols.

Content of this page differs depending on the operating system on which it is viewed. According to this fact it offers relevant options (the *Kerio Outlook Connector* on Windows, *Kerio Sync Connector for Mac* on Mac OS X). The content also respects whether you are connected via HTTP or HTTPS. It also recognizes whether you are connecting via a mobile device. In such cases it offers also download of the *Kerio Connect's* SSL certificate (for details on the SSL certificate, see section 4.2).

### 1.13.5 Keyboard shortcuts used in the Kerio WebMail

Shortcuts for editing of contacts, events, distribution lists and notes:

- *Ctrl+S* — saves the data and closes the window.
- *Ctrl+Enter* — saves the data and closes the window.
- *Ctrl+N* (*Command-N*) — opens window *New message*, *New contact*, *New event*, *New task* or *New note*, depending on the type of the folder just being opened.

Writing a message:

- *Ctrl+K* — this key shortcut completes hinted email addresses in *To*, *Cc* or *Bcc* entries. Addresses to be entered are looked up among the addresses saved in contact folders.
- *Ctrl+Enter* — closes the message and sends it.
- *Ctrl+S* — saves the message to the *Drafts* folder.
- *Ctrl+C* — the text is copied to the clipboard.
- *Ctrl+V* — the text is pasted into a document or a dialog box.
- *Ctrl+X* — the text is cut and pasted to the clipboard.
- *Ctrl+B* — makes the text bold.

- *Ctrl+I* — makes the text italic.
- *Ctrl+U* — underlines the text.

List of messages:

- *Ctrl+R* (*Command-R*) — replies to the message.
- *Ctrl+N* (*Command-N*) — opens the *New mail* window.
- *Ctrl+M* (*Command-M*) — marks message as read.
- *Ctrl+U* (*Command-U*) — shows the source of the message.
- *Ctrl+F*(*Command-F*) — opens a new window where the message can be forwarded.

In *Kerio WebMail*, the following keys can also be used:

- `Home` — used in list browsing. The first page of the current list is opened upon clicking on this key.
- `End` — used in list browsing. The last page of the current list is opened upon clicking on this key.
- `Page Up` — used in list browsing. The previous page is opened upon clicking on this key.
- `Page Down` — used in list browsing. The next page is opened upon clicking on this key.
- `Enter` — opens selected item.

## 1.14 Message filtering

When a message is delivered to a local user of *Kerio Connect*, it is stored in the *INBOX* folder. In *Kerio WebMail*, each user can define a set of actions to be performed on all new incoming messages, as well as their conditions. These actions are called filters and are specified through filtering rules. Filtering does not mean merely refusing email messages or sorting them to folders, but it includes other actions such as notifications to cellular telephones, automatic replies, forwarding the message to a different email address, etc.

### 1.14.1 List of filtering rules

Define filtering rules in the *Mail filters* section. To open this section, click the *Settings* button in the toolbar.

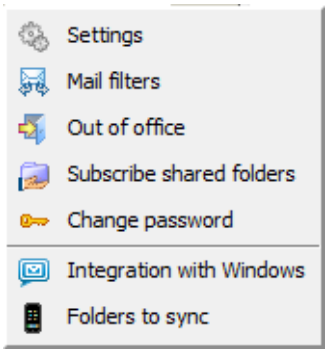


**Figure 1.101** Settings Menu

A list of defined filtering rules is displayed. Each message is checked against this list of rules (from top to bottom). If the message complies with any of the rules, a corresponding action defined for this rule is performed. If the message complies with more than one rule, all previously defined corresponding actions are performed (unless provided otherwise).

Instead in the *Filters* dialog box, the *Spam* and *Out of office* rules can be set in *Settings* → *Settings* → *Spam* (see chapter 1.13.1). In the list, the rules can be viewed, not edited.

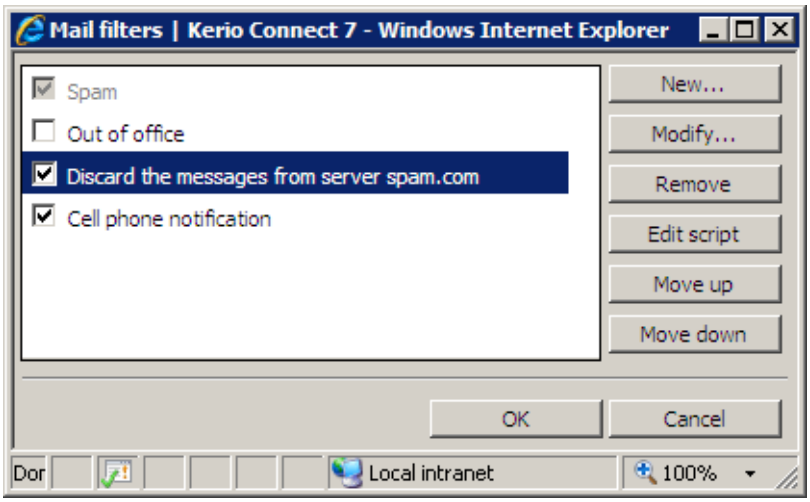


**Figure 1.102** Rule list

A check box next to each rule determines if the rule is active or not. The rule can be disabled temporarily without the need to delete it and create again.

Use the list buttons to perform the following:

**New**

This option creates a new rule.

**Modify**

Use this option to change (edit) the selected rule.

**Delete**
This option removes the selected rule.

**Edit script**
This option is used for editing the script (the filter source code). Filtering rules are created in the Sieve standard language. This means that the dialog window displayed after clicking on the *New* or *Edit* button is a graphic interface for the rules. The graphic dialog window enables setting of all conditions and functions offered by *Kerio Connect*. Therefore, it is recommend that only users who are familiar with the Sieve language and do not wish to use the graphic interface use the *Edit* function.

**Move up, Move down**
Move the rules up or down. All rules are processed from top to bottom and should be sorted from the most specific to the most general ones. A rule can also stop processing of other rules (i.e. no more rules are processed, even though the message would comply with some of them). In such cases, consider carefully where the rule should be inserted.
*Note:*
The *Spam* rule is special and cannot be moved by the *Up* and *Down* buttons. The highest priority is set for the rule.

**Save and close**
This button saves all changes to the rule. This must be done every time you make changes to the rules (including their activation or deactivation using the checkbox) or all changes will be lost. If changes have not been saved, a warning message will be displayed under the rules list (*Your changes are not saved*).

After the rules are set, save the action with the *Save and close* button.

### 1.14.2 Creating or changing a rule

Click the *New* or *Modify* buttons to open a dialog window where you can define a rule. This window is divided into four parts:

1. *Condition* (that the message must meet)
2. *Action* (that will be performed)
3. *Rule description* (a text description that allows modification of some details)
4. *Name of the rule* (a name that will be displayed in the rule list)

#### *Conditions*

The rule will be used if the selected conditions are met. The logical relationships *and* (i.e. all conditions must be met) / *or* (at least one of the conditions must be met) can be used in conditions. Selected conditions are displayed in the third section of the dialog window where you can specify the requested values and change the type of logical conjunction.

*Example:* Create the following condition: “If the sender’s address is `admin@ourcompany.com` or the message subject contains the word `Warning`”.

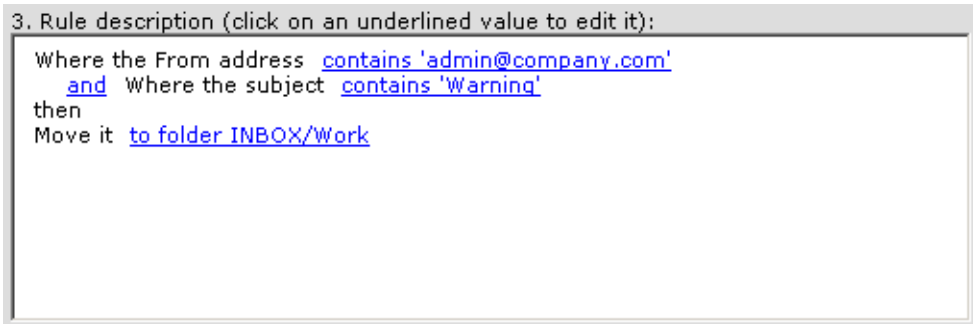


**Figure 1.103** Rule Description

1. Select the *Where the From address is* condition.
2. In the third section, click the *Contains* link — this will open another dialog window where you can specify the address. Enter `admin@ourcompany.com`.
3. Select the *Where the subject contains the words* condition.
4. Upon clicking, the *and* conjunction will be changed to *or*
5. Click on the *contains* link to specify `Warning` (the entry is not case-sensitive).

When specifying required content for a certain entry, several different strings can be defined — the condition will only be met if the entry contains at least one of them (*or* relation).

The condition for the occurrence of a certain string in a given entry can be more general. Click the *Options...* button to specify its occurrence in the entry:

**is**
: The entry must exactly match with the specification.

**is not**
: The entry must not match with the specification.

**contains**
: The entry must contain the (sub)string.

**does not contain**
: The entry must not contain the specified (sub)string.

**matches**
: The entry must match the expression (the expression can contain the `?` and `*` wildcards that can represent one or more characters).
*Examples:*

- `?atch` — matches *batch*, *match*, *patch*, *catch*, *latch*, *hatch*, *ratch*, *natch* and *watch*.
- `*each` — matches *each*, *beach*, *preach*, *peach*, *reach*, *leach*, *teach*, *bleach* and other words.
- `[bmp]atch` — matches *batch*, *match* and *patch*, but not *catch*, *latch*, *hatch*, *ratch*, *natch* or *watch*.

*Note:*
If you need to find a string which includes square brackets, use ? or* wildcard in the *matches* entry instead of them

**does not match**
The entry must not match the expression.

The default value is *contains*.

The following conditions are possible:

**Where the recipient's address (To or Cc line) is**
The specified string must be included in the `To` or `Cc` line.

**Where the sender's address (From) is**
The specified string must be included in the `From` entry.

**Where the To address is**
The specified string must be included in the `To` address.

**Where the Cc address is**
The specified string must be included in the `Cc` address.

**Where the Sender address is**
The specified string must be included in the `Sender` address. This item can be usually found in automatically generated messages (email conferences etc.) where it replaces the `To` field.

**Where the subject contains words**
The specified string must be included in the `Subject` entry.
*Kerio Connect* spam filter can be set so that the Subject entry will include results of antispam tests (the value is represented by asterisks). Using this feature spam may be filtered easily. Simply insert the number of asterisks that will specify the rule. Messages that match this rule will accept this specification.

**Where the message has an attachment**
At least one attachment must be appended to the message.

**Where the message size is more than**
The message size exceeds the specified value. To specify the size you can select from the following units: bytes (*B*), kilobytes (*KB*) and megabytes (*MB*).

**Where the message was detected as a spam**
Spam are undesirable messages sent to users. You can use the *Kerio Connect* antispam filter to protect your users from such messages. This filter uses special header items which include message evaluation and information about applied antispam testing.

**For all messages**
This rule is valid for all incoming messages.

### *Action to be performed*

In the second section of the dialog window, you can choose one or more actions that will be performed if the condition in section 1 is met:

**Move the message to a specified folder**
Move the message to the selected folder (you can choose a folder from a list).

**Forward the message to an address**
Forward to a specified address. In this case no other actions are performed.

**Reject message (return to sender)**
The message will not be stored in a local mailbox and the user will never be informed about it.

**Keep in INBOX**
This action must be combined with another (i.e. with *Move*, *Forward*, *Reject*, etc.). It cannot be combined with the *Discard the message* action.

**Discard the message**
The message will not be stored in any local folder. This action cannot be combined with the *Keep in INBOX* action (these two actions are contradictory).

**Send notification**
Sends notification (i.e. a short text message) to a specified address, typically to a cellular phone. For a cellular phone you must enter the whole email address, not just the telephone number (e.g. john.wayne@t-email.com. For details, see the following sections). The following macros can be used in the message text:

- `$from$` — the notification will show the message sender or the address contained in the *From* field.
- `$from-name$` — the notification will show the name of the message sender.
- `$subject$` — the notification will show the message subject.
- `$text$` — the notification will show the message text. Only the first 128 characters will be displayed. To reduce the number of displayed characters, edit the macro as follows:

  `$text[50]$`

  (the number in brackets represents the maximum number of characters displayed in the text field).

**Send autoreply**
The automatic reply with a specified text. The automatic reply will be sent to each sender's address only once a week (so that the automatic reply does not create a loop in case there is an automatic reply set at the other end).

**Stop processing more rules**
If the message complies with this rule, no more rules will be processed. This function allows users to create more complex rule sequences for different condition types. Always be careful about the order of the conditions (the rules are processed from top to bottom).

*Note:*
Notifications and autoreplies are protected from loops. This means that the system does not send a notification in reply to received notification or automatic replies. The detection of notification or automatic replies is performed using special items in the message header. Only notifications and automatic replies generated by *Kerio Connect* are detected.

#### *Rule description*

In the third section of the dialog box, the user can review a summary of the created rule. Optional values are formatted as links and can be changed repeatedly. The conditions and actions can be easily removed or added by activation or deactivation.

#### *Name of the rule*

Give the created rule a unique name (may be multiple words) that best describes the rule. Naming the rules “Rule 1”, “Rule 2”, etc. is not very helpful.

### 1.14.3 Cellular phone notification

When setting up the notification , a format of the message can be specified. In the notification text, special character sequences can be used which will be replaced by the corresponding parts of the original message.

**$subject$**
Subject of the message

**$from$**
Sender address (`From` field)

**$env-from$**
SMTP envelope `From` address

**$text$**
First 128 characters of the text (message body)

**$text[N]$**
First `N` characters of a message body (`N` is aninteger). The part of the message that will be sent to a cellular phone is determined by the SMS gateway (usually up to one SMS message).

The notification text can have the following form:

```
Message from $from$, subject: $subject$. Message body: $text$
```

## 1.15 Time zones

The whole globe is divided into 24 parts which are called time zones. The individual time zones Are defined by their shift from UTC (Coordinated Universal Time). In most cases, the time is shifted by one hour, but sometimes this shift can be 30 or 15 minutes.

From the geographical point of view, the time zones are delimited by meridians. One time zone (and one meridian) was defined as the origin; It is the meridian of Greenwich. This meridian is also called the "zero" or Greenwich Meridian. The zone of this meridian uses the universal time (UTC), which is the same as GMT (Greenwich Mean Time). Both abbreviations, UTC and GMT, are used for defining time zones and have approximately the same meaning. *Kerio WebMail* uses the GMT time.

The method of time zone indication depends on location of the selected time zone (to the east or west from the Greenwich meridian). If the zone is located east of the greenwich meridian, the time displacement is indicated by the + sign. The zones located west of the meridian are indicated by –.

The time zone issue gets event more complicated, when it is necessary to consider the winter time and the daylight saving time. Thus, the real shift of the local time from the GMT may vary in the course of the year. *Kerio WebMail* considers the winter time and the daylight saving time for the selected time zone automatically.

*Kerio WebMail* shows the time zones in the following manner:

`GMT +12` (Fiji)

`GMT -6` (Easter Island)

The counterpart of the zero meridian is so-called date line which makes a division between the `GMT -12` a `GMT +12` time zones. The date line is not a meridian, because it does not form any connection between the North and South Pole. It just separates two time zones so that one state does not belong to two different time zones at a moment. When you cross the line from the east to the west, a day is added. When you cross from west to the east, a day is subtracted.

### 1.15.1 Change of a time zone

The time zone is set by the *Kerio Connect* machine time by default. It can be changed in *Kerio WebMail* in the user settings on the *General* tab (see chapter 1.13.1).

> ***Warning:***
> When the time zone is changed, the time of entering the events and meetings into the calendar is affected.

### 1.15.2 Events in different time zones

For the delivered messages as well as event settings, *Kerio WebMail* shows the time of the time zone currently selected. The following text illustrates setting of events for different time zones and the time shown:

The events in *Kerio Connect* are stored together with the information about the time zone in which they were created as well as the daylight savings time (if specified). To display the event in a different time zone, *Kerio WebMail* converts it automatically (including the daylight savings time, if specified for the given time zone).

If you log in to *Kerio WebMail* from a different time zone or if another user displays your *Free/Busy* calendar, the time will be converted automatically (including the daylight savings time, if specified in *Kerio WebMail*).

The following examples illustrate the principle of time zones:

*Example 1:*

You live in London. Your time zone is GMT +0. A nbsp;friend from New York invites you for lunch and you arrange a meeting with him for 14:00 hours. A friend from New York invites you for lunch and you arrange a meeting with him for 14:00 hours. Keep in mind that your friend means 14:00 in his time zone, i.e. in GMT -5 (Eastern Time). You have to switch to the friend's time zone in *Kerio WebMail* and create an event with beginning at 14:00.

*Example 2:*

Imagine the previous (*Example 2*) event, but from the other point of view. If your friend sends an invitation for 14:00, it will be displayed as a meeting at 20:00 in your time zone (including daylight saving time). However if you switch the time zone to Eastern Time after you arrive to New York, the meeting will show the correct time — 14:00.

#### *Behavior of the Free/Busy calendar*

The events in *Kerio Connect* are stored together with the information about the time zone in which they were created as well as the daylight savings time (if specified). Thus, it does not matter in which time zone the event was created. The present status will be displayed in the *Free/Busy* (the free/busy information for individual attendees is converted to the time zone specified in your *Kerio WebMail*).

Chapter 2

# Kerio WebMail Mini

*Kerio WebMail Mini* is a simplified version of *Kerio WebMail*. It is designed especially for browsers where JavaScript, CSS and similar technologies are not supported. For this reason, *Kerio WebMail Mini* is useful especially for:

- slow internet connection,
- older browsers where JavaScript is not supported,
- text mode based browsers, such as Lynx or Links,
- mobile PDA and Smartphone devices (see chapter 3).

For reasons as slow speed or missing support for JavaScript, *Kerio WebMail Mini* is suitable rather for basic usage of mail and contacts.

As in the full version of *Kerio WebMail*, there are several user settings in *Kerio WebMail Mini*. User can customize *Kerio WebMail Mini* according to their needs. For detailed description, read chapter 2.5.

Login to *Kerio WebMail Mini* is similar to login to the standard version (see chapter 1.2). If user connects for example via a mobile device or by an older browser, *Kerio WebMail* is switched the *Mini* mode automatically. If a modern browser is used, user can select a Kerio WebMail version to connect to (see figure 2.1).

The main page that displayed after a successful login to *Kerio WebMail Mini* is divided into three sections. The first part contains a tree view of folders (which can be hidden — see chapter 2.1) and the second part lists the content of the folder currently selected (based on the folder type — Mail or Contacts). The third section is the toolbar (its appearance depends on the type of folder currently selected).

**Figure 2.1** Users logged in

## 2.1 User folders

As in the full version, user folders are organized in a tree (see figure 2.2).

Click *Hide folders* in the toolbar to change the structure to a menu in the lower left part of the toolbar. The *Hide folders* option changes to *Show folders* and you can switch back to the original folder structure.

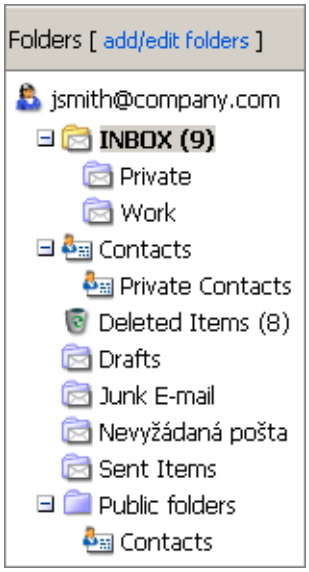


**Figure 2.2** Folder tree

*Note:*
In the version for mobile devices, folder hierarchy is automatically hidden and available only through a menu.

### *Administration of user folders*

The folder administration system works in the similar way as the system in the full version of *Kerio WebMail*, but its functionality is slightly limited. You can add a subfolder, rename it or share with another user (more information on folder sharing and subscription can be found in chapter 1.12).

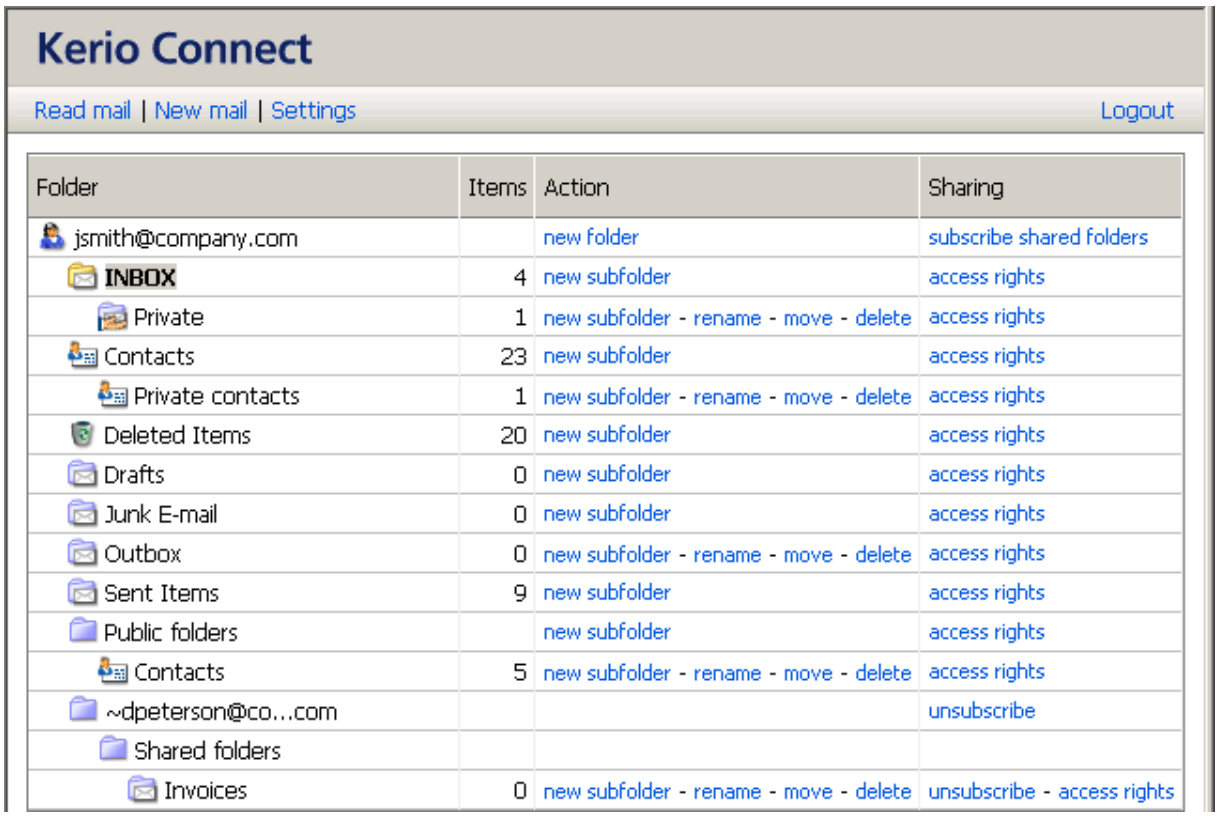


**Figure 2.3** Folder administration

To open the folder administration dialog box, click on *add/edit folders* (see figure 2.2.

The window provides a simple table including a list of all email and contact folders involved in the mailbox. The following section focuses on individual columns of the table:

**Folder**

Folder name. The root folder is always displayed as the first one and it starts with the user icon. It is possible to create a new subfolder in the *Action* column or/and to subscribe (connect) folders shared by other users in the *Sharing* columns.

**Items**

Number of items currently contained in the folder.

**Action**

This column provides several actions to be taken:

- Create a new subfolder
- Rename the (sub)folder
- Move the (sub)folder
- Remove the (sub)folder

**Sharing**

In this column, it is possible to set access rights for own folders as well as subscribe folders shared by other users (only in the row of the root folder).

To set sharing parameters, click *access rights* in the line of the corresponding folder.

**Figure 2.4** Folder sharing

At the folder's access right page, name of the folder is provided, users/groups can be added and various access rights can be selected in the menu.

The following types of access rights (permission levels) are available for folders:

- *Administrator* — the user can read the folder as well as share it with other users and remove items in the group or the group itself. This user is not allowed only to remove access rights for the user who created the group.
- *Editor* — the user can edit items in the folder (add and remove items, etc.).
- *Reader* — the user is allowed only to read the folder's items. No editing is allowed.

Once access rights are set, save settings by clicking on *OK*.

Sharing can also be disabled by selecting *Remove access rights for user or group* and checking user(s) or group(s) for which the access will be disabled. Again, click *OK* to save the settings.

**Figure 2.5** Removing access rights for a folder

## 2.2 Toolbar

The *Kerio WebMail Mini* toolbar is different for individual folder types:

### *Toolbar in email folders*

**Figure 2.6** Toolbar — email

**Read mail**
Click this link to switch the *Kerio WebMail Mini* to the *INBOX* folder.

**New mail**
Use this option to open the dialog box for message composing (for more information, see chapter 2.3).

**Settings**
Click this link to display the page with user settings. The individual options are described in detail in chapter 2.5.

**Hide/Show folders**
Click this link to change the folder structure from the dialog window to a simple selection menu and vice versa.

**Search**
*Mail folders* — use the field located in the toolbar to search for messages. The *Subject* and *From* or *To* fields are searched through (in the *Sent mail* and *Drafts* folders). The search string can be incomplete, it should to with entering a few first characters. But in such case, the search may return too many results.

**Page search**
Folders including greater amount of items are divided to pages. Pages can be searched by using the *Page* section. Links to pages follow this label. Simply click on a link to open the particular page.

**Log out**
Users should always log out when they finish working in *Kerio WebMail Mini*. The logout reduces risk of misuse of the connection to *Kerio Connect*.

### *Toolbar in contacts*

**Figure 2.7** Toolbar — contacts

**New contact**
Opens a dialog where new contact can be added.

**A new distribution list**
Opens a dialog where new distribution list can be defined. To see what a distribution list is and how to use it, refer to section 2.4.

**Settings**
Click this link to display the page with user settings. The individual options are described in detail in chapter 2.5.

**Show/Hide folders**
Click this link to change the folder structure from the dialog window to a simple selection menu and vice versa.

**Search**
*Contacts* — use the alphabet under the toolbar to search in the contacts folder. Click a letter to display contacts starting with this letter. The *First name*, *Last name* and *E-mail* fields of the contact are searched through.

**Page search**
Folders including greater amount of items are divided to pages. Pages can be searched by using the *Page* section. Links to pages follow this label. Simply click on a link to open the particular page.

**Log out**
Users should always log out when they finish working in *Kerio WebMail Mini*. The logout reduces risk of misuse of the connection to *Kerio Connect*.

## 2.3 Mail folders

In the simplified version of *Kerio WebMail*, it is possible to handle the email in a similar way as in the full version. The mail folders are arranged in a table (list). Each row contains one message and available information. The columns contain information to individual messages and actions that are available for the messages.

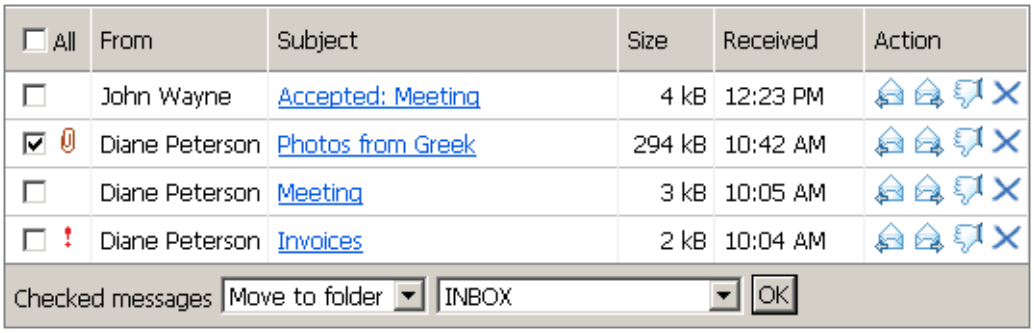


**Figure 2.8** Mail folder

You can mark individual messages by clicking the checkbox at the beginning of each row. If you want to check all messages in the list, click the *All* checkbox. When multiple messages are checked, you can perform various operations with all the messages at once. After checking the messages, select any from the operations in the *Checked messages* menu to apply it to the selected messages.

The *Checked messages* menu contains standard actions that can be performed with selected messages:

**Move to folder**
: The messages will be moved to a selected folder. Click *OK* to confirm the action.

**Copy to folder**
: The messages will be copied to a selected folder. Click *OK* to confirm the action.

**Clear**
: Selected messages will be removed or moved to *Deleted Items*, depending on setting of the *Delete messages permanently* option (for details, see section 2.5).

**Mark as read**
: The messages will be marked as read by default.

**Mark as unread**
: The messages will be marked as unread by default.

**Set flag**
: The flag will be added to message(s). For details about the message flag and its usage, see chapter 1.6.2.

**Delete flag**
The flag will be deleted. For details about the message flag and its usage, see chapter 1.6.2.

**Forward**
The selected messages will be forwarded as attachments. To forward only one message in the email body, use the appropriate action for this message in the message list.

> ***Warning:***
> The actions in the menu depend on access rights settings for the displayed folder (for more information about the access rights to folders, see chapter 1.12). This means that read-only public and subscribe folders cannot be removed or edited. Therefore, these options are not included in the menu.

When performing an action for one message only, you can click some of the icons in the *Action* column in the message list. The *Action* column allows various options of how to handle the message such as replying, forwarding (in a message body), removal or marking the message as spam.

### *New mail*

The mail editor looks like a web form and contains all the functions necessary for sending a message.

The form is divided into two parts. In the first one (called message header), This part is called message header. In the other part, you can write the text of the message and append an attachment. This part is called body.

The header contains the following fields:

**From**
The address that is displayed to the recipient as the address of the sender.

**To**
Enter the email address of the recipient in this field. More than one email address is allowed; the addresses must be separated by commas (see the figure).

**Cc**
The same function as the *To* field. Use this field when you just want to keep the recipient informed and do not need him to reply to the message.

**Bcc**
The address entered in this field is hidden for the other recipients. Blind copy is useful especially when a message is to be sent to more email addresses and you want to protect the privacy of one or more users.

**Subject**
A brief description of the message contents.

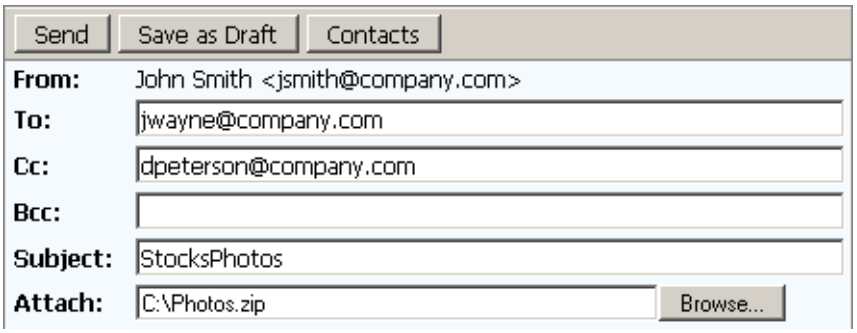


**Figure 2.9** New mail

The message body consists of the text and attachments (if any).

The form header includes various buttons allowing basic operations with the message:

**Send**
The message will be sent to the addresses entered into the *To*, *Cc* and *Bcc* fields.

**Save as Draft**
The message will be moved to the *Drafts* folder, where it can be opened, edited and sent.

**Contacts**
Use the *Contacts* button to search for a contact address and to add it to a corresponding field (*To:*, *Cc:* or *Bcc:*). Only the standard contacts folder and the standard public contacts folder are searched through.

**Attach**
Use this button to attach a file to a message. At maximum, three files can be attached. After its first use, the button is hidden. You cannot append more than 3 files at once to one message.

> ***TIP***
> To attach more than three files, the following trick can be used:
>
> - Attach the first three files and save the message as a draft.
> - Open the message draft and attach other files (three attachments can be added at one turn).

> ***Warning:***
> Each attachment appended must not exceed the limit set by the administrator in *Kerio Connect*. Otherwise, the particular message will not be delivered.

### *Message reading*

New messages are delivered to the *INBOX* folder by default (folders for incoming messages can be specified in the rules— see chapter 1.14). The unread messages are marked in bold. The number of unread messages is indicated in parentheses next to the folder name.

Click the message subject to view the selected message. Message header as well as body are shown on the page. There are also several buttons to perform various actions with the message:

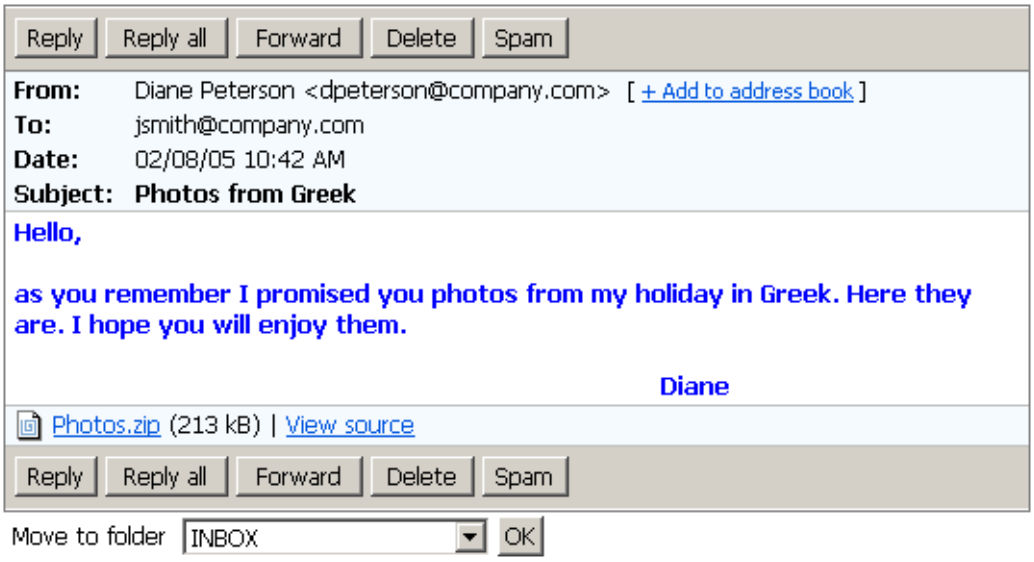


**Figure 2.10** Viewing messages

**Reply**

To reply to the message you received, click the *Reply* button and edit the message in the editbox. The email address of the person who has sent the original message is entered automatically in the *To* field.

**Reply all**

The *Reply all* button works similarly to the *Reply* option, but your answer is sent not only to the author of the message, but also to all recipients (except you).

**Forward**

Use the *Forward* button to open the dialog for forwarding a message; the *To* and *Cc* fields are left blank, because the system does not know who do you intend to forward the message to.

**Clear**

Use this button to either delete the selected message or move it to the *Deleted items* folder. This option depends on *Kerio WebMail Mini* configuration (see chapter 2.5).

After the message is deleted, the next message in the list is displayed (in the descending order). If the deleted message was the last one in the list, previous message is displayed.

> ***TIP***
> When you press the *Delete* button together with the *Shift* key, you will return back to the message list.

**Spam/Not spam**

Marks message as spam or non-spam. For details about spam, see chapter 1.6.5.

> ***TIP***
> When you press the *Spam/Not spam* button together with the *Shift* key, you will return back to the message list.

> ***Warning:***
> Some of the buttons described above may miss if the message is opened in a folder where the user rights are limited (for details on folder access rights, see chapter 1.12). In other words, the message that is read-only (e.g. in public folders) can be forwarded or replied to, but it cannot be deleted or marked as spam. These options are not displayed in the menu for the "read-only" messages.

> ***TIP***
> In *Settings* (see chapter 2.5) it is possible to enable opening of messages in a new window. This option is recommended especially for slower connections since messages are opened faster in a new window.

### *Looking up messages*

In *Kerio WebMail Mini*, two types of searching are available:

**Simple search**

This type is available by simple typing the searched string in the entry on the toolbar. The search engine seeks the string in subjects and senders' addresses of the folder currently opened.

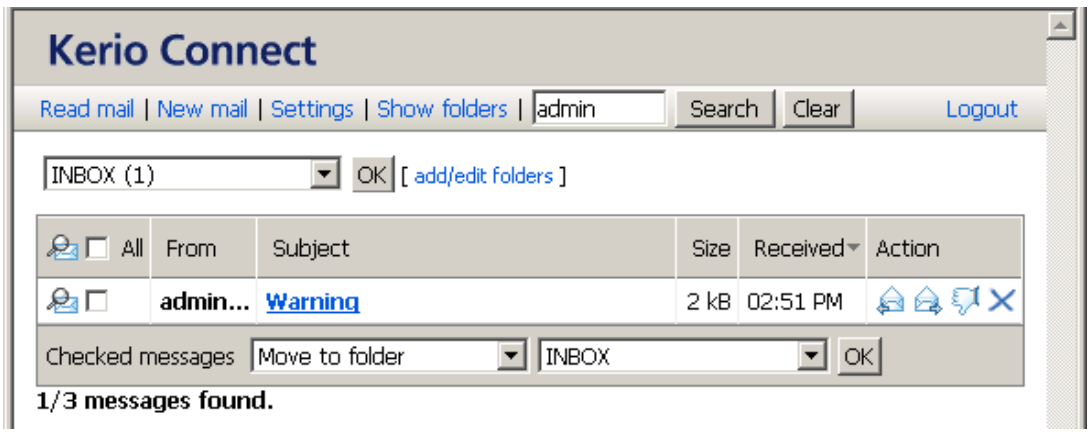


**Figure 2.11** Searching by sender

Simply enter a string to be looked up and click *Search* next to the text entry. All messages found are listed. Click *Clear* to clear the search and view the entire list again.

**Advanced search**

For advanced search, click *Advanced* on the toolbar (see figure 2.12). The following criteria can be used to filter out searched messages:

- by subject,
- by sender,
- by addressee,
- by size,
- by date of reception,
- by the fact whether the message includes any attachments,
- by flag,
- by priority,
- by the fact whether the message was marked as spam.

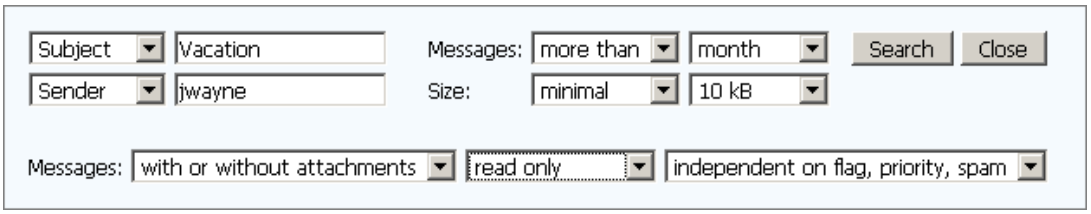


**Figure 2.12** Advanced search filter

> ***Warning:***
> Only messages that meet all criteria specified in the filter will be listed.

When the filter is ready, click *Search*.

**Search**

All messages meeting the criteria will be listed upon clicking on the button.

**Close**

The search filter will be hidden and the searching will be disabled.

## 2.4 Contacts

In the list display, information to individual contacts are listed in rows. Each line includes a contact and associated information available (e.g. email address, phone numbers, etc.). Columns display detailed information for contacts. Each column enables sorting contacts by information. Click the header of the selected column to sort contacts in ascending or descending order alphabetically, by numbers or by date (depending on the contents of the selected column).

You can mark individual contacts by clicking the checkbox at the beginning of each row. If you want to check all contacts in the list, click the *All* checkbox. When multiple contacts are checked, you can perform various operations with all the contacts at once. After checking the contacts, select any from the operations in the menu under the contact list to apply it to all contacts selected.

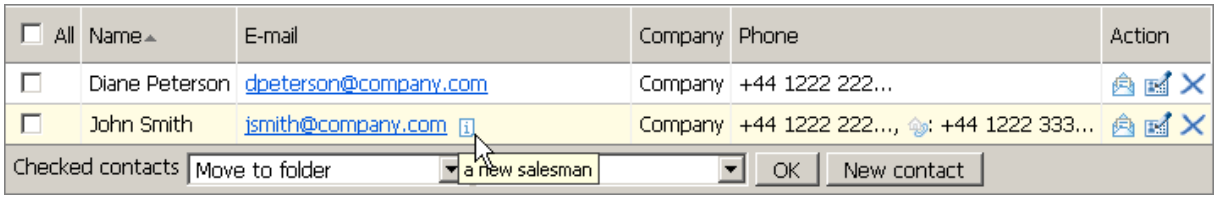


**Figure 2.13** Contacts list

Actions:

**Move to folder**
The checked contacts will be moved to a selected folder.

**Copy to folder**
The checked contacts will be copied to a selected folder.

**Delete**
Selected contacts will be removed or moved to *Deleted Items*, depending on setting of the *Delete messages permanently* option (for details, see section 2.5).

**Send message**
A dialog box for composing new message is opened and the addresses of the selected contacts are added to the *To* field.

**Add to distribution list**
All selected contacts will be added to the distribution list. Click OK to open a menu and choose a distribution list where selected contacts will be added.

When performing an action for one contact only, you can click any of the icons in the *Action* column in the contacts list. Use the *Action* column icons to reply to the contact address, edit the contact, add the contact to the distribution list or delete the contact from folder.

Click the email address in the contact list to open the form for creating a new contact (see picture 2.9). The address of the selected contact appears in the *To* field.

### *Creating a new contact*

To create a new contact, click on the *New contact* link and fill in the details in the dialog box. If a comment is added in the dialog, the “i” icon will be added in the contact list. After you place your cursor on an email address, a comment will be shown (see picture 2.13).

Click the button in the upper left corner of the dialog box to save the created contact.

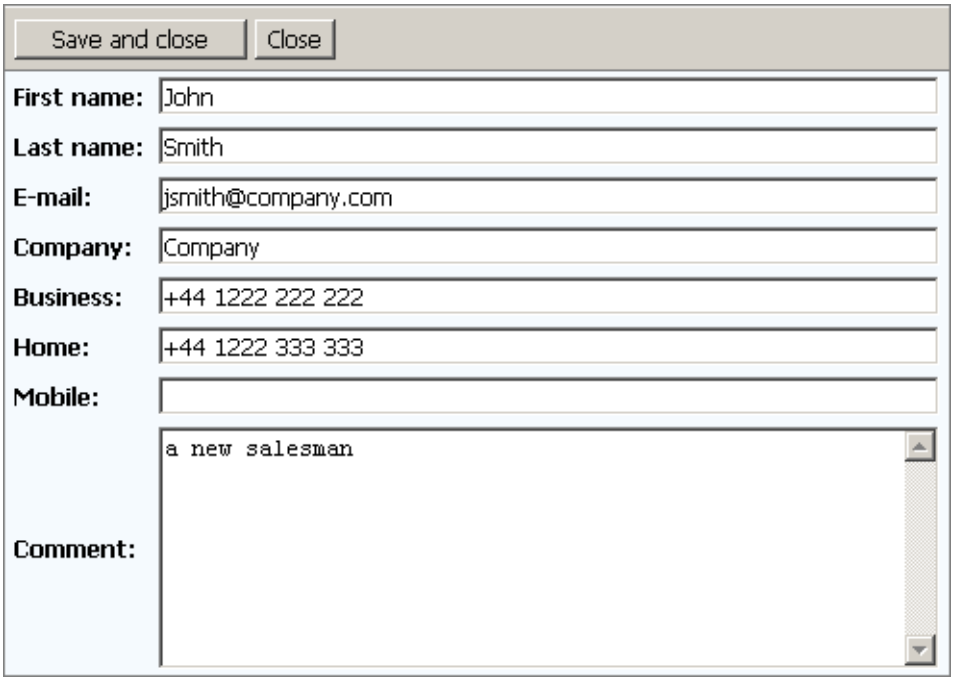


**Figure 2.14** The dialog box for creating of a new contact

### *Distribution lists*

Distribution lists are groups of email addresses used for sending of collective email. Simply use a special dialog in *Kerio WebMail* to complete desired email addresses and save them under a common name. Whenever sending an email message to such a group, simply enter the distribution list name instead of filling in individual addresses.

Distribution lists are helpful if email is often sent to a group of addressees. For example, it can be a group of people with whom you often communicate in your work or outside the office, as shown at figure 2.15 (it is a certain alternative to mailing lists or to group addresses).

A new distribution list can be created in any contact folder, as follows:

1. Open any contact folder.
2. Select the *New distribution list* option on the toolbar.
3. This opens a dialog where a new distribution list can be created (see figure 2.15) and where email addresses can be added.
4. Enter a name for the distribution list in the *Name* entry.
5. Add contacts to the distribution list. The *Select* and *Add* buttons can be used for this purpose:
   - The *Select* button opens a dialog where addresses can be looked up and selected in contact folders. This button is available only if JavaScript is enabled.

The dialog contains the following items:

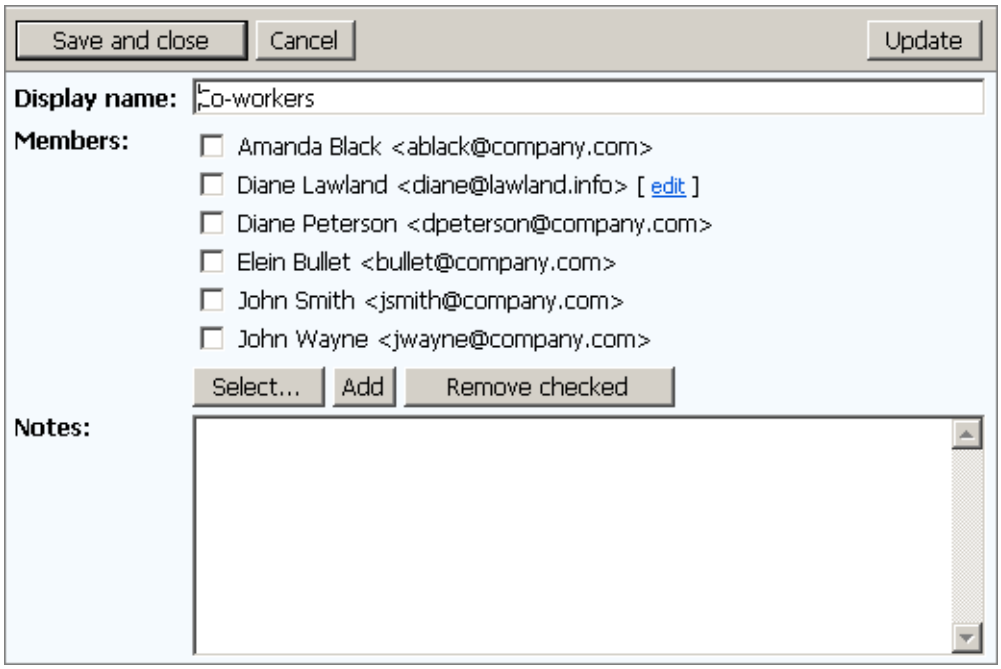


**Figure 2.15** Distribution list

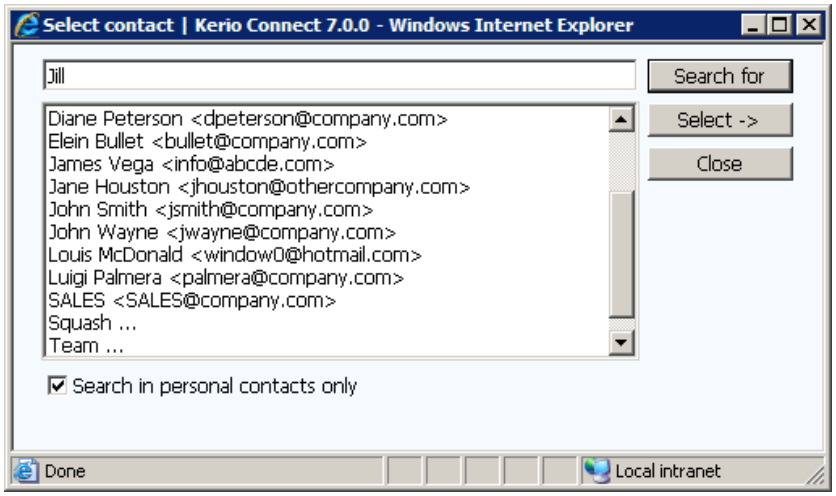


**Figure 2.16** Select

### The Search for entry

Fill in a string that will be used as the search criteria. It is possible to search by first and second names as well as display names (full names) or by email addresses. Simply enter the first letters of the first name, second name or user name. Click on *Search*. The first 200 contacts matching the string are displayed (or less). Usually, the list of contacts found is narrower, so it is easy to choose the contact we have been looking for.

**Contacts list**

You can also use contact list to select existing contacts. Unless a particular string is being searched, contacts of all folders set in *Kerio WebMail's* user settings are displayed in the dialog.

To add a contact to the distribution list, select it with the mouse pointer and click on *Select*. Individual contacts as well as contact groups (i.e. user groups sharing one email address) and other distribution lists can be added to a distribution list.

One or multiple contacts can be chosen in contact lists (by holding the `Shift` or `Ctrl` key and selecting items by the mouse pointer) and then added to the distribution list by the *Add to list* button.

**Search in private contacts only**

If this option is enabled, the search will not be performed in any public contact folders. In such a case, only private folders and subfolders are searched through. Enabling of this option may speed up the search under certain circumstances, especially where public contact folders are large.

When done, simply click on *Close* to close the dialog.

- If you want to add a contact which is not saved in any contact folder yet, use the *Add* button. In the dialog just opened, enter the first and second name and email address:

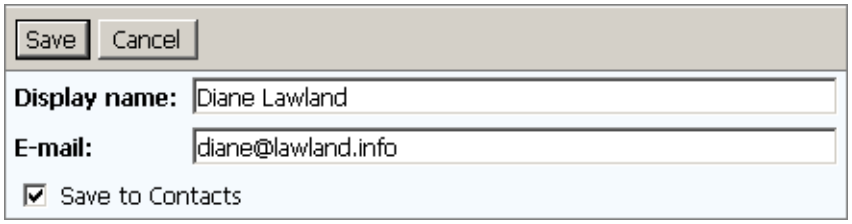


**Figure 2.17** Add

**Name**

Enter first and second name of the new distribution list member.

**E-mail**

Enter email address of the new distribution list member (required).

**Save to contacts**

Enable this option to save member information also in the Contacts folder.

6. A note can be attached to any distribution list. It can be for example a description of the group or another information. The note can be defined on the *Notes* tab of the distribution list dialog.

7. Save changes by clicking *Save and Close*.

Once created, distribution lists are saved in the contact folder where they can also be managed.

Contacts, groups (group of users with a shared email address) or other distribution lists can be later added to a distribution list. Two methods can be used to achieve this. First, open a distribution list and add an address in the same way as when creating a list. Second, select contacts in a contact folder, in the *Selected contacts* menu select the *Add to distribution list* option and confirm settings by clicking on *OK*.

## 2.5 User Settings

Use the *Settings* section to change the individual user settings. Click the *Settings* link in the toolbar to display the page for specifying settings.

After you perform any changes to the user settings, click the *Save and close* button in the upper left corner of the page to save these settings.

> ***Warning:***
> User settings are connected with the full version of *Kerio WebMail*. Most of the user settings changes will be therefore applied also in the full version of the program. Settings applicable only to *Kerio WebMail Mini* are marked by a note in parenthesis.

### *General*

**Number of displayed messages**
Use this option to set the number of messages that will be displayed in the message list. This option applies only to the *WebMail Mini* interface.

**Preferred language**
Selection of a language for the *Kerio WebMail* interface.

**Date format**
Selection of the date display. The date form follows this pattern: dd — day, mm — month, yyyy — year.

**Time format**
Selection of the time display for messages and contacts folders.

**New window for reading messages**
Check the option to read messages in a new window.

**New window for writing messages**
Check this option to write messages in a new window.

**Compact layout for PDA**
This option is enabled by default. When logging in to *Kerio WebMail* from a mobile device, the pages will be optimized to fit to the screen of the device. This setting will hide the WebMail logo, make the folders list more compact, etc.

### *Email*

**Delete messages permanently**

Check this option if you do not want to store deleted messages in *Deleted items* folder.

**Default sender address**

The email address from which the messages are sent. Should any address be specified here, the new email message dialog will include a menu where an address can be selected (see figure 2.18).

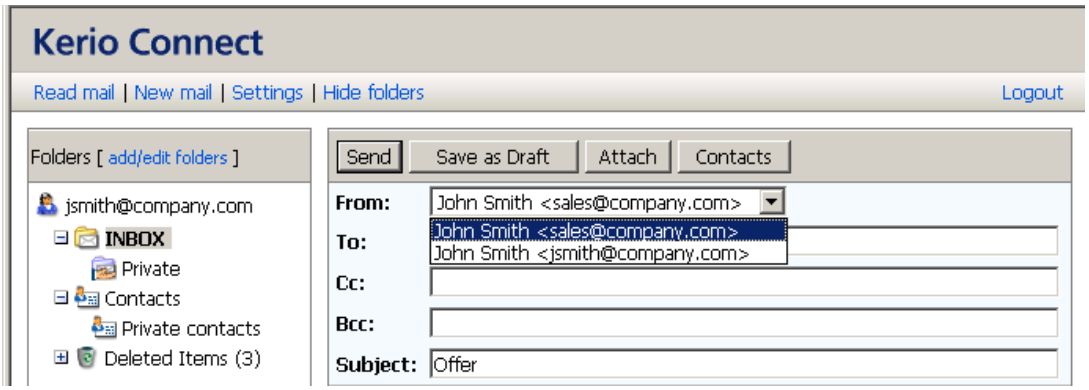


**Figure 2.18** Sender selection

**Address for replies**

Address to which replies will be sent (the `Reply-To:` item).

**Organization**

Name of the company is included in the message as the `Organization:` header.

**Signature**

The signature added automatically to all sent messages (including replies and forwarded messages).

**Show signature ...**

Check this item to show the signature at the end of the message. By default, the signature is added before the original message.

**Display image attachments inline**

The image attachments (GIF, JPEG) can be displayed directly in the message body. If this option is unchecked, only a hyperlink to the image is displayed. It is not recommended to enable this option in *WebMail Mini* with slow Internet connection. The option is set separately for *WebMail Mini* and for *Kerio WebMail* interface.

**Display images from the web**

Each message with HTML body can contain links to images stored on the remote server. If this option is enabled, the images will be downloaded from the server. In this way, for example, active mailboxes can be identified easily (and misused for the purpose of sending spam messages). Your computer can be also attacked due to browser security errors. For these reasons, it is recommended to leave this option inactive.

### *Out of office*

Setting up the automatic reply sent during extended absence of the user.

### *Password*

For security reasons, the connection to *WebMail Mini* requires the secured version of the HTTP protocol. The beginning of the URL address must be entered as follows: `https://`

There are three fields for specifying the original password as well as the new one. The new password must be entered twice, in order to eliminate typing errors. If the password contains special (national) characters, users of some mail clients will not be able to log in to *Kerio Connect*. It is therefore recommend to use only non-diacritic characters for passwords.

### *About*

The *About* section contains information about current version of *Kerio Connect*, the product trademark and a hyperlink to official web site of *Kerio Technologies*.

## 2.6 Quota

In *Kerio Connect*, it is possible to set a quota for each email account that defines limits for number of messages and mailbox capacity (disc space).

*Quota* in *Kerio WebMail Mini* can be viewed at the page which is opened upon clicking on the root folder. It informs users about free capacity of their mailboxes. When the quota is reached, the user will receive a warning message including recommendation on deleting some messages. If the user ignores this warning, other mail will not be delivered to the mailbox since no more capacity is left.

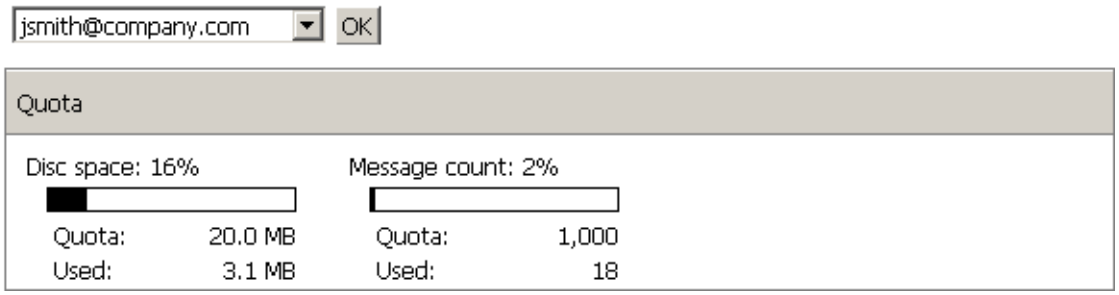


**Figure 2.19** User mailbox quota

Chapter 3

# Kerio WebMail on mobile devices

The *Kerio WebMail* interface can also be run in browsers for mobile devices (PDA and Smartphone devices). *Kerio WebMail* automatically recognizes a browser and when such a browser type is detected, it is automatically switched to the *Kerio WebMail Mini* mode, customized for mobile screen parameters. Thanks to special environment, working with *Kerio WebMail Mini* is very fast and comfortable.

*Note:*
The only exception is *Apple iPhone* where (if working with the Safari browser) it is possible to choose from two versions of *Kerio WebMail* (full version and the Mini version).

As the standard version of *Kerio WebMail Mini* (see chapter 2), the version for mobile devices includes the following folders:

- mail folders,
- contact folders,
- email and contact public folders
- email and contact shared folders

For detailed instructions on authentication to *Kerio WebMail*, refer to chapter 1.2.

***Warning:***
Secured SSL is recommended to be used for connections to the server.

Once an authentication is completed successfully, the *INBOX* folder is opened (see figure 3.1).

The environment resembles the one used in desktop browsers. It is just optimized to fit in the smaller size of PDA and Smartphone devices.

The basic difference is that the toolbar is divided in two parts, one of them located above and the other below the main window.

The following sections provide hints on where features known from the desktop version of *Kerio WebMail* can be found and on how to use them.

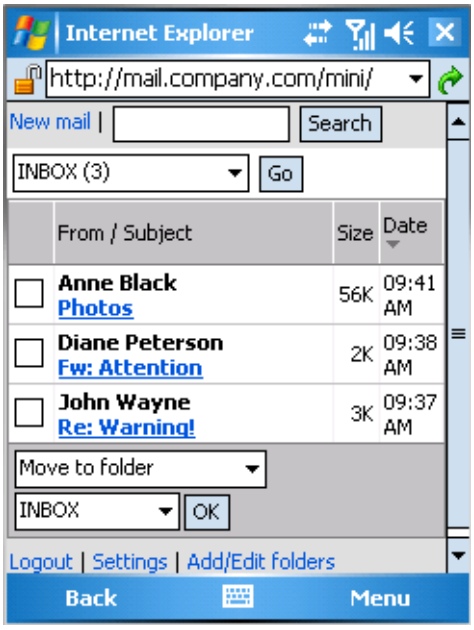


**Figure 3.1** Kerio WebMail Mini INBOX folder

## 3.1 Message reading

Messages can be read right away in *Kerio WebMail Mini* since the *INBOX* folder (see figure 3.1) is opened immediately after a successful login.

To open a message, click on its subject formatted as a link. This opens a window including the message body, toolbar and several buttons allowing further operations regarding the message (see figure 3.2):

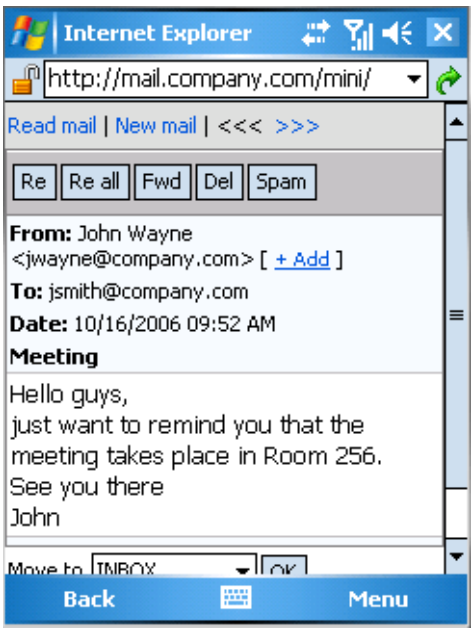


**Figure 3.2** Message viewing

### 3.1.1 Toolbar

The email toolbar contains the following options:

**Read mail**
Click on *Read mail* to view the list of messages included in the current folder.

**New mail**
This button opens an email-compose editor. For detailed description on this window, refer to chapter 3.2.

**<<< >>>**
Click on arrows to navigate back or forward within the message list.

The second row of buttons in the toolbar includes the following options:

**Re**
To reply to the current message, use the *Re* button. Upon clicking it, a message editor is opened.

**Re all**
The *Re all* button also replies to the current message. The only difference from the previously described function is that this option replies to the sender and all addressees included in the message's recipient list.

**Fwd**
To forward the current message to other addresses, use the *Fwd* button. The message editor is opened with the forwarded message included. If desired, the message can be edited and/or attachments can be added or removed. Use the *To* entry to specify email addresses of the new recipients.

**Del**
The *Del* button deletes the current message. If the current message is deleted, the next one is opened in the window.

**Spam**
The *Spam* button allows to mark the message as spam. For details on spam and *Kerio Connect's* antispam protection, refer to chapter 1.6.5.

### 3.1.2 Message header and body

The message header contains basic information includes the message sender, other recipients and date of delivery. The *Add* button can be used to add the sender's address to the *Contacts* folder. Upon clicking on the button, the contact data such as sender's first and second name, telephone number and other items can be specified in the contact card.

The message body includes the message contents, above all the text and attachments. Attachments are shown as clickable links. If image displaying is enabled for the message body (user settings are addressed in section 3.5), image attachments are showed in the message body instead of showing just their links.

## 3.2 Message writing

To compose a message, first open the message editor by clicking on the*New mail* link located in the upper left-hand corner (see figure 3.1). This opens the standard message editor with a simple toolbar and blank entries for the header (where addresses can be added) and message body.

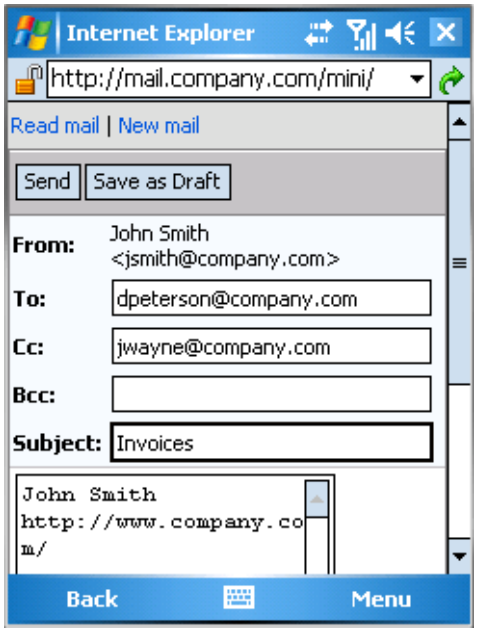


**Figure 3.3** Message editor

### 3.2.1 Toolbar

The message editor toolbar contains the following options:

**Read mail**
This option closes the message editor and opens the *Inbox* folder.

**New mail**
This button opens the message editor.

The second row of buttons in the toolbar includes the following options:

**Send**
This option sends the message to all addresses included in the corresponding entries.

**Save as Draft**
This option is useful when a message is started and cannot be finished at the moment for any reason. The *Save as Draft* button saves the message in the *Drafts* folder where incomplete messages are supposed to be stored.

### 3.2.2 Message header and contents

Message headers cover the following entries:

**From**
The address that is displayed to the recipient as the address of the sender.

**To**
Enter the email address of the recipient in this field. It is possible to enter multiple addresses separated by commas.

**Cc**
The same function as the *To* field. Use this field when you just want to keep the recipient informed and do not need him to reply to the message.

**Bcc**
The address entered in this field is hidden for the other recipients. Blind copy is useful especially when a message is to be sent to more email addresses and you want to protect the privacy of one or more users.

**Subject**
A comprehensive summary of the contents.

Message text is entered in the large field below the message header.

*Note:*
In *Kerio WebMail Mini* for mobile devices, it is not possible to include attachments in messages.

## 3.3 Contact list editing

Contact folders in the minimized mode designed for mobile devices include only basic contact lists. Each contact item contains full name and email address (see figure 3.4). Other information such as telephone numbers is displayed when a particular contact is opened (see figure 3.5). To view contact details, simply click on the *Edit* icon in the particular item's line.

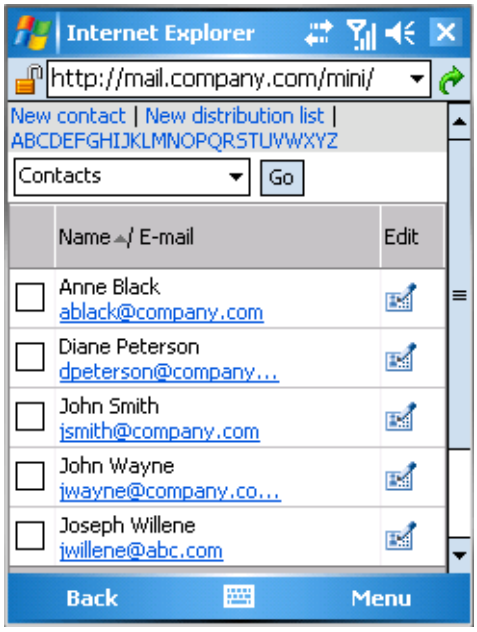


**Figure 3.4** Contact folder

### 3.3.1 Create and edit contacts

To create a new contact, click on the *New contact* link on the contact folders toolbar (see figure 3.4). In the dialog just opened, basic information for the contact can be entered.

The edit contact dialog is identical with the create contact window. To open it, simply click on the *Edit* icon in the particular item's line.

**Figure 3.5** The create/edit contact dialog

Once all settings are done, save the new data by clicking on *Save and Close*.

To quit the dialog without saving changes, click on *Close*.

### 3.3.2 Creating and editing distribution lists

Detailed description on distribution lists and their usage are addressed in chapter 1.7.7.

A new distribution list can be created in any contact folder, as follows:

1. Click on the *New distribution list* link on the contact folder's toolbar.
2. A dialog is opened where a distribution list can be created and edited (see figure 3.6).

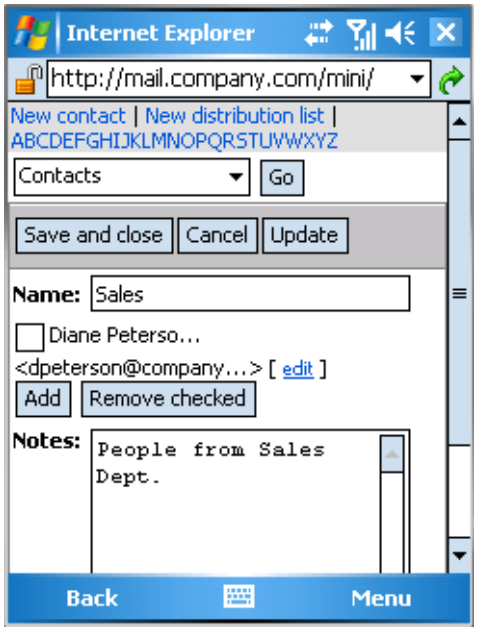


**Figure 3.6** The create/edit distribution list dialog

3. In the *Name* entry, specify the list name.
4. The *Notes* textfield is optional and it allows attachment of any remarks regarding the list.
5. Click on *Add*. A dialog is opened where it is possible to add email addresses (see figure 3.7)
6. Use the *Name* and *E-mail* entries to specify name and email address of the contact to be added to the distribution list.
7. If the *Save to Contacts* option is enabled, the data will be also saved as a new contact item.
8. Click *Save* to confirm settings.
9. Use the *Close and Save* button to save the name also in the distribution list.

Distribution lists are saved in contact folders, highlighted by bolder font.

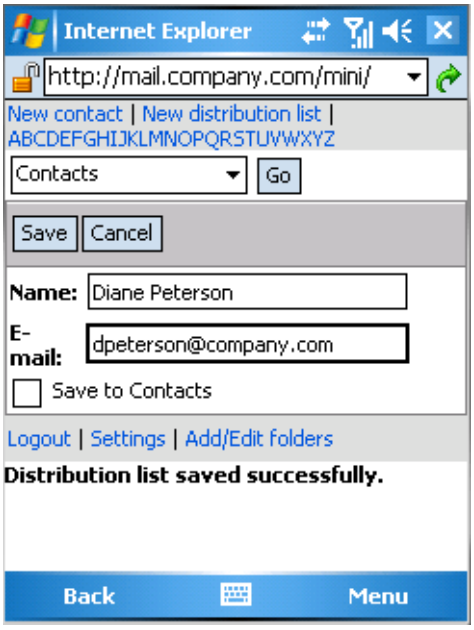


**Figure 3.7** Adding addresses to distribution lists

## 3.4 Folder Administration

In the version designed for mobile devices, *Kerio WebMail Mini* also allows folder maintenance. This feature does not differ from the same option in the full version of *Kerio WebMail*. You can add a subfolder, rename it, dislocate it within the tree or share with another user (more information on folder sharing and subscription can be found in chapter 1.12.5).

**Figure 3.8** Kerio WebMail Mini's bottom toolbar

To manage folders, click on the *Add/Edit folders* link on bottom toolbar in the *Kerio WebMail Mini's* for mobile devices (see figure 3.8).

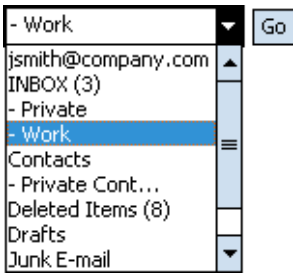


**Figure 3.9** Bottom menu

The folder administration window includes all email and contact folders contained in the account, including public and subscribed folders. The first folder in the list is so called root folder (details on root folder are provided in section 1.12.1). The other folders are ordered hierarchically. Their order follows the same scheme as in the standard folder menu (see figure 3.9). Unlike default folders, subfolders are introduced with dashes. The more dashes there are before a folder, the lower the folder belongs in the hierarchy. Folder hierarchy is shown at figure 3.10.

Click on any folder to open it.

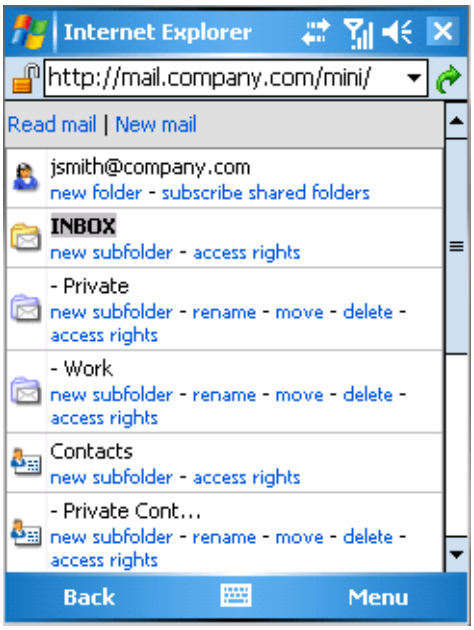


**Figure 3.10** Folder Administration

The links below each folder allow to manipulate with the particular items. Each folder type includes different links, in accordance with the particular folder type's options. The following links are available:

**New folder/New subfolder**

Click the link to create a new folder. The new item will be a subfolder of the folder to which the link belongs.

**Rename**

The *rename* link opens a dialog where the folder's name can be changed (available only for user-defined folders). Default folders cannot be renamed.

**Move**

The *move* link can be clicked to move the folder within the folder tree.

**Clear**

Use this link to delete the folder.

**Subscribe shared folders**

This option is available only for root folders. Click on the link to open a dialog where a shared folder can be subscribed. Sharing of folders is described in chapter 1.12.5.

**Access rights**

To share the folder with other users or to remove access rights, click on the *access rights* link. Sharing and subscription of folders is described in chapter 1.12.5.

## 3.5 User Settings

*Kerio WebMail Mini* for mobile devices allows change some user settings so that users can customize their interface in accordance with their needs.

To change user preferences for the interface, click on *Settings*. The link can be found in the *Kerio WebMail Mini's* bottom toolbar (see figure 3.8).

Some of the *Settings* dialog's items apply to all versions of *Kerio WebMail*, other apply only to *Kerio WebMail Mini* for mobile devices. A short note describing the exclusion is attached to settings applied to *Kerio WebMail Mini* (see the *Number of displayed messages* option at figure 3.11).

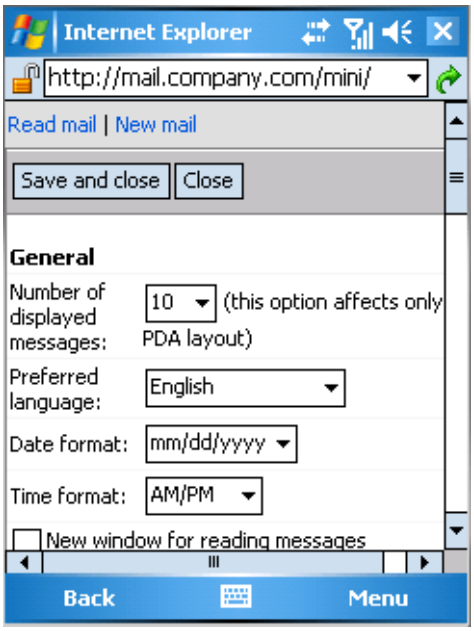


**Figure 3.11** User Settings

Each item is described in detail in section 2.5.

Chapter 4

# Data synchronization with mobile devices

*Kerio Connect* supports the ActiveSync which is used to synchronize data between the computer (server or workstation) and mobile devices.

ActiveSync is a protocol but it is also an application generally included in mobile devices with Windows Mobile operating systems. It is also a desktop application installed to desktop computers and used to synchronize data with mobile devices connected to the computer via a so called “cradle”.

*Kerio Connect* uses the ActiveSync protocol for direct synchronization of data saved on the server with data stored in mobile devices. It supports synchronization of email folders, calendar, contacts and, in case of some devices, also tasks.

For details on folder selection for synchronization see chapter 1.12.7.

## 4.1 Supported mobile devices

*Kerio Connect* supports several mobile devices. Table 4.1 provides an overview of supported devices.

*Note:*
*Kerio Connect* supports both *Windows Mobile* for Pocket PC and Smartphone edition.

| Device type | Email | Calendar | Contacts | Tasks | Direct Push | Global Address Lookup | Kerio Smart Wipe |
|---|---|---|---|---|---|---|---|
| WM 5.0 | YES | YES | YES | YES | | | YES |
| WM 5.0 AKU2 | YES | YES | YES | YES | YES | YES | YES |
| WM 6.0 and 6.1 | YES | YES | YES | YES | YES | YES | YES |
| WM 6.5 | YES | YES | YES | YES | YES | YES | YES |
| Windows Phone 7 | YES | YES | YES | YES | YES | YES | YES |
| Palm Treo 750v | YES | YES | YES | YES | YES | YES | YES |
| Palm Pre | YES | YES | YES | YES | YES | YES | YES |
| Nokia Eseries[a] | YES | YES | YES | | YES | YES | YES |
| Nokia N73, N95 and N900[b] | YES | YES | YES | | YES | YES | YES |
| Sony Ericsson M600i and P990i[c] | YES | YES | YES | | YES | YES | YES |
| Sony Ericsson Xperia X10, X10 mini, X10 mini pro | YES | YES | YES | YES | YES | YES | YES |
| HTC Nexus One[d]<br>HTC Hero<br>DROID, DROID 2, DROID X by Motorola<br>HTC Bravo, HTC Desire | YES | YES | YES | YES | YES | YES | YES |
| Motorola Backflip with Motoblur | YES | YES | YES | YES | YES | YES | YES |
| Apple iPhone OS X 2.0 and higher | YES | YES | YES | | YES | YES | YES |
| Apple iPad | YES | YES | YES | | YES | YES | YES |
| BlackBerry[e] | YES | YES | YES | YES[f] | YES | YES | YES |
| Samsung GALAXY S I9000 | YES | YES | YES | | YES | YES | YES |

[a] Nokia Eseries devices are supported if the external application Mail for Exchange 1.3.0 or higher is installed.

[b] The Nokia N73 and N95 devices are supported if the external application Mail for Exchange 1.6.1 or higher is installed.

[c] Sony Ericsson M600 and P990i are supported if the external application Exchange ActiveSync 2.10 or higher is installed.

[d] Telephone devices HTC Nexus One, HTC Hero and DROID by Motorola use the Android operating system.

[e] BlackBerry devices are supported only if NotifySync 4.6.9.3 or higher or AstraSync 2.2.13 or higher is installed. However, it is recommended to use *Kerio Connector for BlackBerry*.

[f] Tasks are supported only if NotifySync or *Kerio Connector for BlackBerry* is used.

**Table 4.1** Supported features

## 4.2 SSL Certificates

HTTP protocol is used for direct communication between *Kerio Connect* and mobile devices. This protocol is not secured and the connection might be wiretapped. This might lead to misuse of your fragile information such as username and password. For this reason, SSL (Secure Socket Layer) encryption is often used for traffic to protect the communication from wiretapping. The HTTP protocol secured by SSL encryption is called HTTPS.

SSL encryption is based on so called SSL certificates. Mailserver disposes of the certificate of the server against which the certificate in your mobile device is suppose to authenticate. There are two types of certificates:

- certificates signed by a trustworthy commercial certification authority,
- self-signed certificates.

If your certificate is signed by a commercial authority, there exists a great chance that the device already includes the certificate and no installation will be required. However, if you use the *Kerio Connect's* self-signed certificate or a certificate signed by an authority not supported by the device, it is necessary to download and install the certificate in your device. The instructions for this procedure are provided below..

To encrypt your traffic by SSL, download and install the certificate before configuring the *ActiveSync*.

The following guidelines suppose there is a working Internet connection set in your mobile device:

1. In the browser, enter your *Kerio Connect's* URL to open the *Kerio WebMail's* login page (see section 1.2).
2. Click on *Download SSL certificate*.
3. Installation of the certificate should be offered by the device. Install it.

The suggested guidelines work on most of mobile devices. However, on some devices installation of the certificate is a bit more difficult:

### *Allowing installation of a root certificate in WM 5.0 Smartphone Edition*

The security policy of Smartphone devices with *Windows Mobile 5.0* or *Windows Mobile 5.0 AKU2* forbids installation of certificates issued by other than trusted certification authorities.

To allow installation of certificates issued by authorities not supported by the particular device (an internal certificate or the *Kerio Connect's* self-signed certificate), it is necessary to install a mobile device registry editor on the mobile device and use this editor to allow installation of untrustworthy certificates. One of the options is for example application `regeditSTG.zip` (24.01 KB).

In this editor, follow these instructions:

1. Find and download `regeditSTG.zip` (available for free) and unpack it.
2. Move the editor to the mobile phone (e.g. by using the *MS ActiveSync* desktop application).

   > ***Warning:***
   > It is necessary that the file is saved in the phone, not on the memory card.

3. On the telephone, click on the file and run it.
4. Run `regeditSTG.exe` and find `HKLM\Security\Policies\Policies`
5. Change the following registry items:
   - 00001001 overwrite the 2 with 1
   - 00001005 overwrite the 16 with 40
   - 00001017 overwrite the 128 with 144
6. Now you can download the certificate from the server and install it.

   > ***Warning:***
   > So called “hard reset” removes the registry changes (it is necessary to repeat the settings if needed).

#### *SSL encryption in Sony Ericsson devices*

If the *Kerio Connect’s* self-signed certificate is installed, the device does not require confirmation for each synchronization with the server:

Therefore, it is recommended to install a certificate signed by a trustworthy certification authority.

## 4.3 Windows Mobile 5.0

In cooperation with *Kerio Connect*, Windows Mobile 5.0 provides many additional features:

- Windows Mobile 5.0 supports the following folder types:
  - email
  - calendar

    - contacts
    - tasks

- *Wipe* — implementation of the ActiveSync protocol allows the *Kerio Connect* administrator remote removal of all synchronized folders and user login data from the device.

The following options are not supported by *Kerio Connect*:

- SMS-based Always Up-To-Date (AUTD)

Setting of *ActiveSync* on Windows Mobile 5.0 is identical with settings on Windows Mobile 5.0 AKU2. See sections 4.4.1 a 4.4.2 on infromation about ActiveSync settings.

## 4.4 Windows Mobile 5.0 AKU2

In cooperation with *Kerio Connect*, Windows Mobile 5.0 AKU2 provides these features:

- Windows Mobile 5.0 AKU2 supports the following folder types:
    - email
    - calendar
    - contacts
    - tasks
- *DirectPush Technology* — this technology allows mobile devices to keep open HTTP(S) connection with the server. Whenever a new item is received or any change is performed in any folder, changes are synchronized immediately.
- *Kerio Connect* supports *Global Address Lookup* — this feature allows to look up email addresses in all contact folders available to the particular user (including public folders).
- *Wipe* — so called “wipe” allows *Kerio Connect* administrators reset remote devices. This reset clears all user data out of the device. Only default files and settings will be kept on the mobile device.

The following features of Windows Mobile 5.0 AKU2 are not supported by *Kerio Connect*:

- Setting of security policy from the server (Enforce Security Policy)
- SMS-based Always Up-To-Date (AUTD)

### 4.4.1 ActiveSync settings in Pocket PC Edition

It is not necessary to install the *ActiveSync* application since it is included in the Windows Mobile operating system (it can be found under *Start* → *Programs*).

Before the starting to configure, it is necessary to check if connection of the device to network is set correctly (required for connection to the mailserver). This can be tested for example by using *Internet Explorer* to connect to *Kerio WebMail* (for details, see chapter 1.2).

If the connection does not fail, you can start to set the *ActiveSync* application:

1. In *Start* → *Programs*, use the *ActiveSync* icon (see figure 4.1) to run the application.

**Figure 4.1** ActiveSync icon

2. When setting the ActiveSync device for the first time, an informative tips are displayed to guide you through. Click on the *set up your device to sync with it* link.

   If you already know how to set ActiveSync, open same dialog from *Menu* → *Add Server Source* (see figure 4.2). This method can be also used whenever you need to change the configuration.

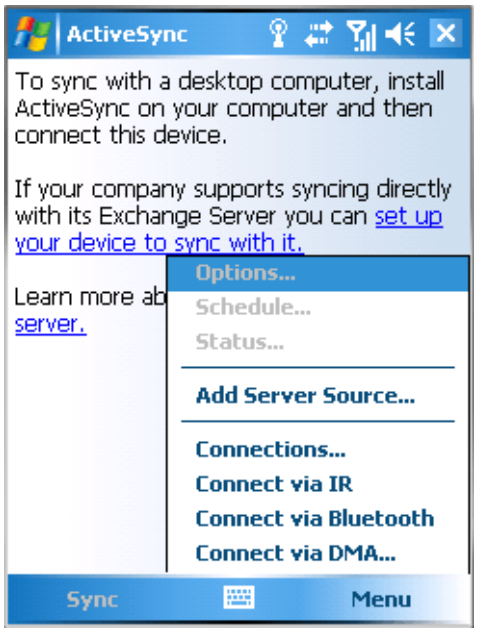


**Figure 4.2** ActiveSync menu

*Note:*
In case that the ActiveSync application has already synchronized data with another mailserver, remove the settings by clicking on the *Delete* button in *Menu* → *Options* (see figure 4.2).

3. This opens the first page of the configuration wizard (see figure 4.3) used for specification of the *Kerio Connect's* Internet name.

**Figure 4.3** ActiveSync — specification of a mailserver and setting secure traffic

The *This server requires an encrypted (SSL) connection* option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.

To allow the encryption, it is required that an SSL certificate is installed on the device. If your company uses certificates authorized by a commercial certification authority, it is possible that your device already includes support for SSL encryption. If the company uses a certificate generated by *Kerio Connect* or another internal certificate, it is necessary to install another certificate on the device. For guidelines for this procedure, see section 4.2.

Once the server name is set and SSL encryption enabled, click on *Next* to open the following page of the configuration wizard.

4. On the second page, set your login data (see figure 4.4):

**User name**
Use this entry to specify the user name used for authentication to *Kerio Connect*.

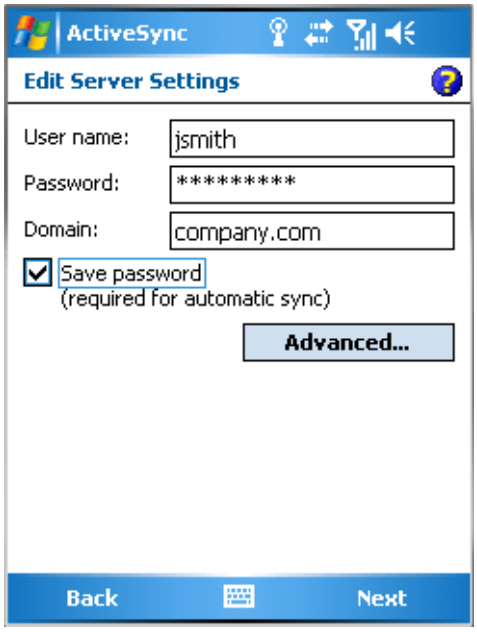


**Figure 4.4** ActiveSync — user login data definition

**Password**

Use this entry to specify the password used for authentication to *Kerio Connect*.

**Domain**

Use this textfield to enter the email domain name (usually it is the part of your email address after the @ symbol).

**Save password**

If you do not wish to be asked for the login data by each startup of the synchronization, enable this option. If you want to use the feature of automatic synchronization, this option is required to be enabled.

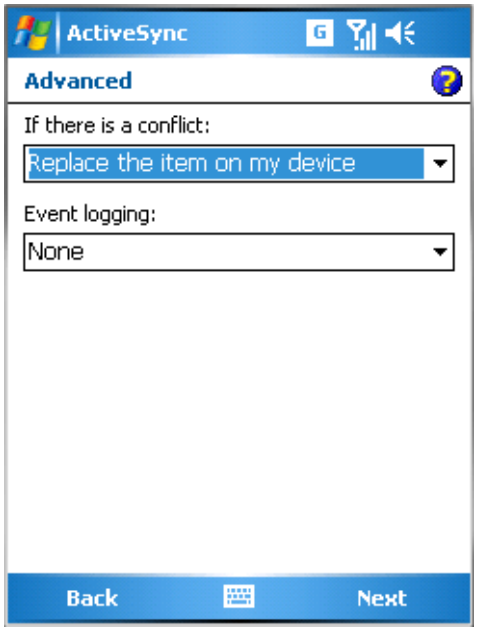


**Figure 4.5** ActiveSync — the Advanced dialog box

*Note:*
Besides login data items, the *Advanced* button is included in this dialog. It can be used to set optional parameters. The dialog allows to set measures to be taken in case that a collision occurs during the synchronization (see figure 4.5).

Collisions might occur when some folders to be synchronized have been changed both on the server and on the device since the last synchronization. According to the parameters set here, *ActiveSync* will either beat the change performed on the server with the one applied on the device or the other way round. By default, the server beats the device. It is recommended to keep these settings.

Once the settings are done, click on *Next*.

5. The following dialog provides a list of all folder types which can be synchronized (see figure 4.6). Check only those folders that will be synchronized and leave unchecked or uncheck the others.

   The *Settings* button also included in the dialog is active only upon clicking on the *Calendar* or *E-mail* folder and it opens a dialog where synchronization parameters for calendar and email folders can be set. The *Contacts* and *Tasks* folders do not contain any other parameters.

   **Calendar Sync Options**

   Selection of the *Calendar* folder and a consequent clicking on *Settings* opens a dialog with synchronization settings (see figure 4.7). The dialog includes a menu where it can be set how old data will be synchronized.
   New events will be synchronized without exception. However, to shorten the time needed for synchronization, it si possible to set the maximum age of events to be

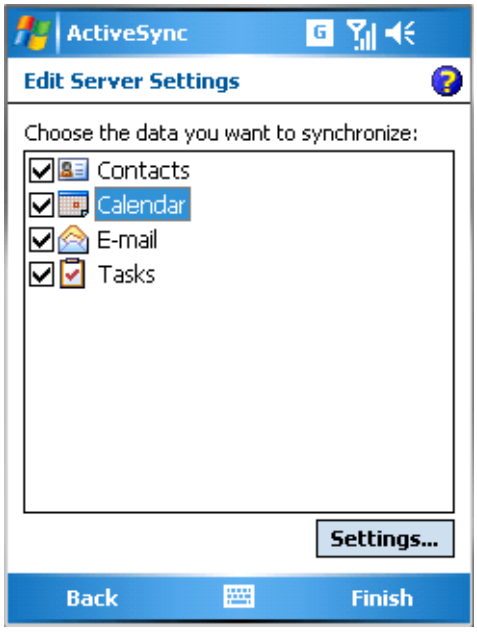


**Figure 4.6** ActiveSync — folder synchronization settings

synchronized (it is not necessary to synchronize old data where the information will not be needed any longer).

By default, data up to two weeks old is synchronized. If you need to synchronized also older data, change the settings. In such a case, bear in mind that at least the first synchronization may take longer.

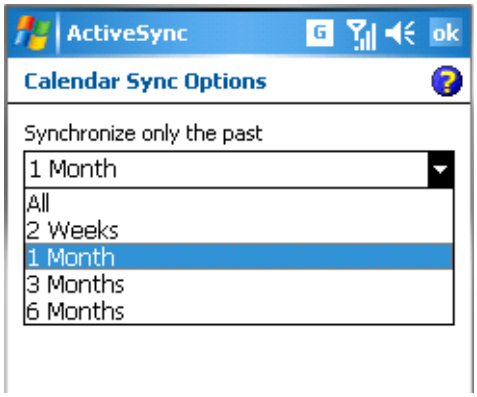


**Figure 4.7** ActiveSync — calendar synchronization settings

### E-mail Sync Options

Selection of the *Calendar* folder and a consequent clicking on *Settings* opens a dialog with synchronization settings (see figure 4.8). The dialog includes several options to customize synchronization:

- *Include the previous* — this option allows to set how old messages will be synchronized. By default, messages up to three days old are included in the synchronization.
- *Limit e-mail size to* — only messages of size up to the value set will be synchronized.

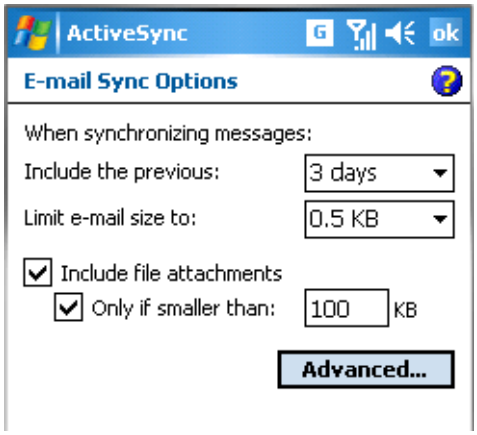


**Figure 4.8** ActiveSync — email synchronization settings

- *Include file attachments* — if this option is enabled, attachments are also included in synchronization.
- *Only if smaller than* — the value entered in this option sets the maximum size of email attachments to be synchronized. Larger attachments are excluded from synchronization.

The settings described above help decrease time needed for synchronization as well as the load of the synchronization on network connection.

6. Once the settings are done, save the configuration by clicking on *Finish*. Now, the first synchronization between the device and *Kerio Connect* will be started.

   During the synchronization, a dialog appears requiring confirmation of appliance of the security policy (see figure 4.9). Use the *OK* button for confirmation, otherwise the synchronization will not be completed correctly.

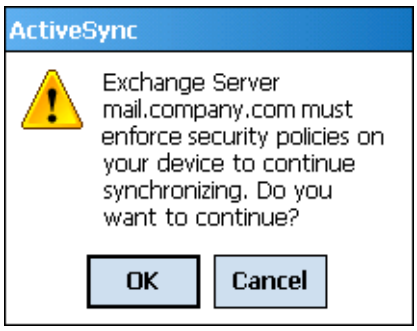


**Figure 4.9** Wipe confirmation

Other *ActiveSync* settings are focused in your device's user's guide.

### 4.4.2 ActiveSync settings in Smartphone Edition

It is not necessary to install the *ActiveSync* application since it is included in the Windows Mobile operating system (it can be found under *Start* → *ActiveSync*).

Before the starting to configure, it is necessary to check if connection of the device to network is set correctly (required for connection to the mailserver). This can be tested for example by using *Internet Explorer* to connect to *Kerio WebMail* (for details, see chapter 1.2).

If the connection does not fail, you can start to set the *ActiveSync* application:

1. In *Start Programs*, use the *ActiveSync* icon (see figure 4.10) to run the application.

**Figure 4.10** ActiveSync icon

2. Click on *Menu* and select *Add Server Source* (see figure 4.11).

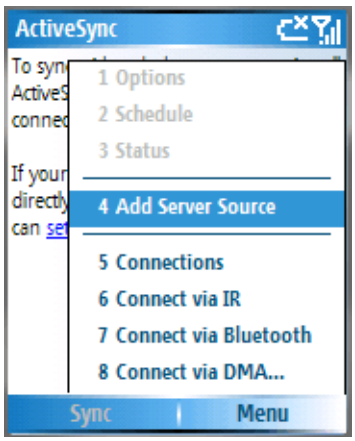


**Figure 4.11** ActiveSync menu

*Note:*
In case that the ActiveSync application has already synchronized data with another mailserver, remove the settings by clicking on the *Delete* button in *Menu* → *Options* (see figure 4.11).

3. This opens the synchronization's configuration wizard.

   On the first page of the wizard, use the *Server address* entry to specify the server's Internet name (see figure 4.12).

   The *This server requires an encrypted (SSL) connection* option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.

   To allow the encryption, it is required that an SSL certificate is installed on the device. If your company uses certificates authorized by a commercial certification authority, it is possible that your device already includes support for SSL encryption. If the company uses a certificate generated by *Kerio Connect* or a certificate signed by an internal authority, it

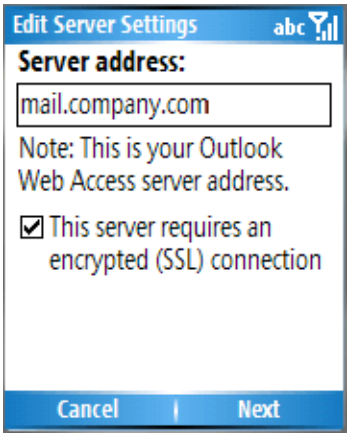


**Figure 4.12** ActiveSync — specification of a mailserver and setting secure traffic

is necessary to install another certificate on the device. For guidelines for this procedure, see section 4.2.

Once the server name is set and SSL encryption enabled, click on *Next* to open the following page of the configuration wizard.

4. On the second page, set your login data (see figure 4.13):

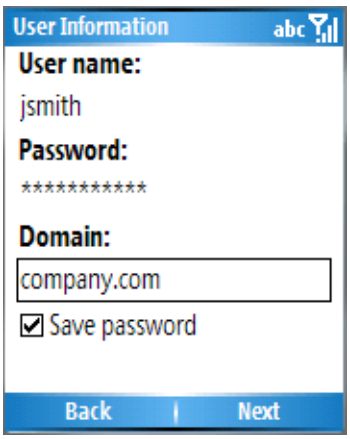


**Figure 4.13** ActiveSync — user login data definition

**User name**
: Use this entry to specify the user name used for authentication to *Kerio Connect*.

**Password**
: Use this entry to specify the password used for authentication to *Kerio Connect*.

**Domain**
: Use this textfield to enter the email domain name (usually it is the part of your email address after the @ symbol).

**Save password**

If you do not wish to be asked for the login data by each startup of the synchronization, enable this option. This option is required to be enabled especially if you want to use the feature of automatic synchronization.

5. The following dialog provides a list of all folder types which can be synchronized (see figure 4.14). Check only those folders that will be synchronized and leave unchecked or uncheck the others.

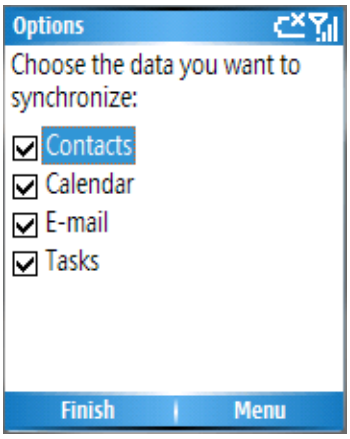


**Figure 4.14** ActiveSync — folder synchronization settings

Synchronization of email and calendar allows additional settings. Select *Calendar* or *E-mail* and click on *Menu*. In the menu just opened, select *Settings* (see figure 4.15). This opens a dialog providing options in accordance with type of item to be synchronized:

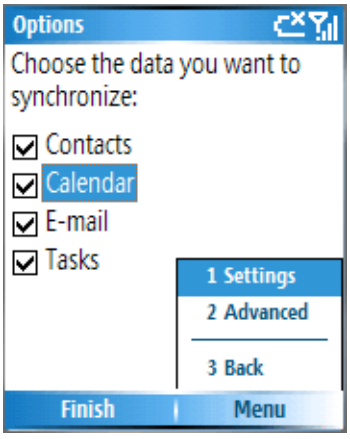


**Figure 4.15** Folder synchronization settings — Menu

### Calendar Sync Options

The *Calendar Sync Options* dialog (see figure 4.7) includes a menu where is can be set how old data will be synchronized.

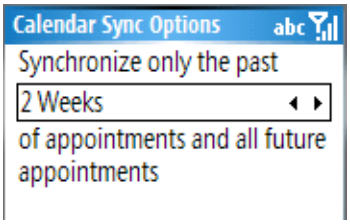


**Figure 4.16** Folder synchronization settings — calendar

New events will be synchronized without exception. However, to shorten the time needed for synchronization, it si possible to set the maximum age of events to be synchronized (it is not necessary to synchronize old data where the information will not be needed any longer).

By default, data up to two weeks old is synchronized. If you need to synchronized also older data, change the settings. In such a case, bear in mind that at least the first synchronization may take longer.

### E-mail Sync

The *E-mail Sync* dialog (see figure 4.8) includes two parameters to be customized:

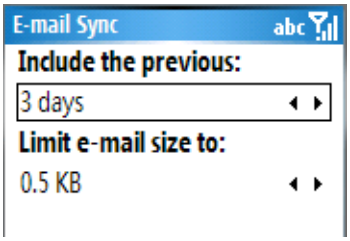


**Figure 4.17** Folder synchronization settings — email

- *Include the previous* — this option allows to set how old messages will be synchronized. By default, messages up to three days old are included in the synchronization.
- *Limit e-mail size to* — only messages of size up to the value set will be synchronized.

The settings described above help decrease time needed for synchronization as well as the load of the synchronization on network connection.

6. Before closing the wizard, click on the *Menu* button (see figure 4.15) and select the *Advanced* option. It allows setting of optional parameters. The dialog allows to set measures to be taken in case that a collision occurs during the synchronization (see figure 4.18).

   Collisions might occur when some folders to be synchronized have been changed both on the server and on the device since the last synchronization. According to the parameters set here, *ActiveSync* will either beat the change performed on the server with the one applied on the device or the other way round. By default, the server beats the device. It is recommended to keep these settings.

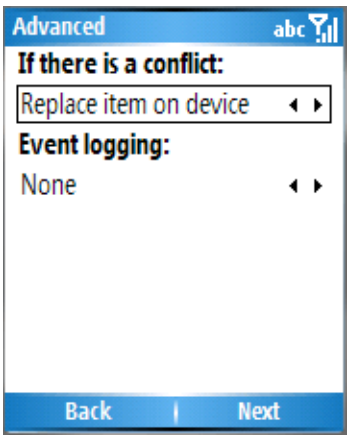


**Figure 4.18** ActiveSync — the Advanced dialog box

Once the settings are done, click on *Next* and consequently on the *Finish* button to save settings.

7. Once the settings are done, save the configuration by clicking on *Finish*. Now, the first synchronization between the device and *Kerio Connect* will be started.

   During the synchronization, a dialog appears requiring confirmation of appliance of the security policy (see figure 4.19). Use the *OK* button for confirmation, otherwise the synchronization will not be completed correctly.

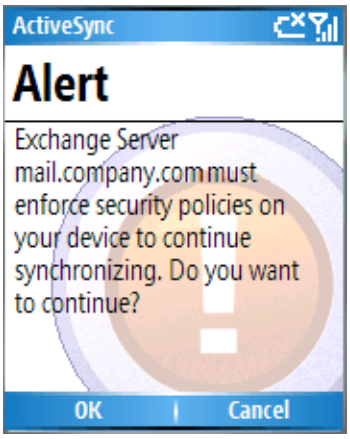


**Figure 4.19** Wipe confirmation

Other *ActiveSync* settings are focused in your device's user's guide.

## 4.5 Windows Mobile 6.0

In cooperation with *Kerio Connect*, Windows Mobile 6.0 provides the following features:

- Windows Mobile 6.0 supports the following folder types:
  - email
  - calendar

    - contacts
    - tasks
- *DirectPush Technology* — this technology allows mobile devices to keep open HTTP(S) connection with the server. Whenever a new item is received or any change is performed in any folder, changes are synchronized immediately.
- *Kerio Connect* supports *Global Address Lookup* — this feature allows to look up email addresses in all contact folders available to the particular user (including public folders).
- *Wipe* — so called "wipe" allows *Kerio Connect* administrators reset remote devices. This reset clears all user data out of the device. Only default files and settings will be kept on the mobile device.

If you perform synchronization via *ActiveSync 12*, your device will also support:

- HTML emails,
- message flags,
- the "Out of office" feature (see section 1.13.2).

The following features of Windows Mobile 6.0 are not supported by *Kerio Connect*:

- Setting of security policy from the server (Enforce Security Policy)
- SMS-based Always Up-To-Date (AUTD)

Setting of *ActiveSync* on Windows Mobile 6.0 is identical with settings on Windows Mobile 5.0 AKU2. See sections 4.4.1 a 4.4.2 on infromation about ActiveSync settings.

## 4.6 Nokia Eseries

*Nokia Eseries* allows folder synchronization by the ActiveSync protocol if the *Nokia's Mail For Exchange* application is installed on the device. Installation and configuration of the application are addressed in section 4.6.1

Devices E52, E55, E72 and E75 already have *Mail for Exchange* installed.

*Mail For Exchange* with *Kerio Connect* provide the following options and features:

- *Nokia Eseries* supports the ActiveSync protocol, version 2.5.
- *Nokia Eseries* supports synchronization of the following folder types:
    - Inbox — other email folders are not synchronized.
    - Other folders and subfolders (only Nokia E52 — E75 with integrated Mail for Exchange).

  - Calendar — the default private calendar.
  - Contacts — the default private contact folder.

- *DirectPush Technology* — this technology allows mobile devices to keep open HTTP(S) connection with the server. Whenever a new item is received or any change is performed in any folder, changes are synchronized immediately.
- *Kerio Connect* supports *Global Address Lookup* — this feature allows to look up email addresses in all contact folders available to the particular user (including public folders).
- This version allows installation of the root certificate on the device — this implies that it is also possible to use the *Kerio Connect's* self-signed certificate for encryption.

*Mail For Exchange* does not support the following features:

- It is not possible to synchronize public and shared folders.
- It is not possible to accept/reject an invitation. Invitations can be viewed in *Inbox* but it cannot be manipulated — it does not offer the *Accept* and *Reject* buttons and it is not displayed in the calendar.

### 4.6.1 Mail For Exchange Settings

The *Mail for Exchange* application is not included in the mobile device set. Therefore, it is necessary to install it. Import and installation of the application is described in the application's guide which is available at the Nokia website.

*Note:*
This chapter describes settings for devices *Nokia E60* and *Mail For Exchange 1.3.0*. It can, therefore, slightly differ on other versions.

1. After installation of *Mail for Exchange*, locate the application (see the icon at figure 4.20) and open it.

**Figure 4.20** Icon of Mail For Exchange 1.3.0

2. In the application, select the Sync mode option (see figure 4.21).

**Figure 4.21** Mail For Exchange welcome page

3. In the menu just opened, select the *Edit profile* option (see figure 4.22)

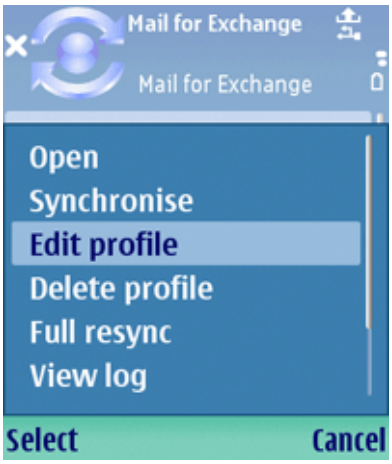


**Figure 4.22** Options → Edit profile

4. In the *Profile* menu, select *Connection* (see figure 4.23).

5. This opens a dialog for connection to the server. The first section to be set is the *Connection* tab (see figure 4.24). The following parameters are to be set here:

**Figure 4.23** The Edit profile menu

**Figure 4.24** The Connection dialog

### Exchange server

Enter the server's internet name or IP address.

### Secure connection

The *Secure connection* option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.

To allow the encryption, it is required that an SSL certificate is installed on the device. If your company uses certificates authorized by a commercial certification authority, it is possible that your device already includes support for SSL encryption. If the company uses a certificate generated by *Kerio Connect* or another internal certificate, it is necessary to install another certificate on the device. The installation is described in section 4.2.

Now, save settings of the tab.

6. In the *Profiles* menu, select *Credentials*. Enter login information used for connection to your mailbox (see figure 4.25):

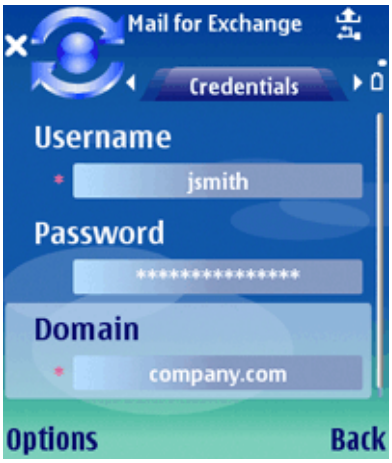


**Figure 4.25** The Credentials dialog

**Username**
Use the *Username* textfield to enter username used for connection to the mailbox in *Kerio Connect*.

**Password**
Use the *Password* textfield to enter password used for connection to the mailbox in *Kerio Connect*.

**Domain**
Use the *Domain* textfield to enter the name of the email domain (if you are not sure about this part, contact your administrator).

Save the settings.

7. In the *Profiles* menu, select *Sync content*. On this tab, set folders to be synchronized (see figure 4.26). The tab also allows selection of preferred store for possible collisions. Collisions might occur when some folders to be synchronized have been changed both on the server and on the device since the last synchronization. In accordance with the settings, either the changes performed on the server will beat and overwrite the changes in performed on the device (the *Server wins* option) or the other way round (the *Phone wins* option) within the *ActiveSync*. By default, the server beats the device. It is recommended to keep these settings.

8. In the *Profiles* menu, select *Sync schedule*. On this tab it is possible to schedule automatic synchronization (see figure 4.27):

**Figure 4.26** The Sync content dialog

**Figure 4.27** The Sync Schedule dialog

**Peak sync schedule**
Sets the synchronization interval for peak time (the time when you need as fresh information as possible, usually this time includes the working hours).

**Off-peak sync schedule**
Sets the synchronization interval for off-peak time (usually at night).

**Peak start time**
Setting of the peak time start.

**Peak end time**
Setting of the peak time end.

**Peak days**
Setting of peak days (all working days are set by default).

9. Return to the *Profiles* menu and select the *Calendar* option. On this tab it is possible to set parameters for automatic synchronization (see figure 4.27):

**Figure 4.28** The Calendar dialog

**Sync calendar back**

All upcoming events are included in the synchronization. However, to shorten the time needed for synchronization, it si possible to set the maximum age of events to be synchronized (it is not necessary to synchronize old data where the information will not be needed any longer).

By default, data up to two weeks old is synchronized. If you need to synchronized also older data, change the settings. In such a case, bear in mind that at least the first synchronization may take longer.

**Initial sync**

Before the first synchronization of the server with the device, it is necessary to remove one of the stores to avoid collisions. The *Initial sync* option specifies whether data on the server (*Keep items on phone*) or on the device (*Delete items on phone*) will be removed during the first synchronization.

10. In the *Profiles* menu, select the *Contacts* option. This tab allows setting of solution for possible initial collision (see figure 4.29). Before the first synchronization of the server with the device, it is necessary to remove one of the stores to avoid collisions. The *Initial sync* option specifies whether data on the server (*Keep items on phone*) or on the device (*Delete items on phone*) will be removed during the first synchronization.

11. In the *Profiles* menu, select the *Email* option. On this tab, it is possible to set parameters of synchronization of email folders (see figure 4.30):

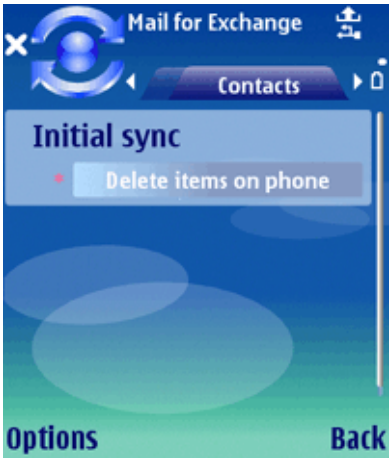


**Figure 4.29** The Contacts dialog

**Figure 4.30** The Email dialog

**Email address**
The option requires entering of the email address.

**Show new mail pop-up**
Enables/disables new mail notifications.

**Use signature**
Allows adding of a footer to email messages.

**Signature**
Footer definition.

**When sending mail**
Setting of time when email is sent (immediately or during the upcoming synchronization).

**Sync messages back**

All unread messages are included in the synchronization. However, to shorten the time needed for synchronization, it si possible to set the maximum age of messages to be synchronized (it is not necessary to synchronize old data where the information will not be needed any longer).
By default, synchronization is set to messages up to three days old. If you need to synchronized also older data, change the settings. In such a case, bear in mind that at least the first synchronization may take longer.

## 4.7 Nokia N73 and N95

*Nokia N73 and N95* allows folder synchronization by the ActiveSync protocol if the *Nokia's Mail For Exchange 1.6.1* or higher is installed on the device.

*Mail For Exchange* with *Kerio Connect* provide the following options and features:

- *Nokia N73 and N95* supports the ActiveSync protocol, version 2.5.
- *Nokia N73 and N95* supports synchronization of the following folder types:
  - Inbox — other email folders are not synchronized.
  - Calendar — the default private calendar.
  - Contacts — the default private contact folder.
- *DirectPush Technology* — this technology allows mobile devices to keep open HTTP(S) connection with the server. Whenever a new item is received or any change is performed in any folder, changes are synchronized immediately.
- *Kerio Connect* supports *Global Address Lookup* — this feature allows to look up email addresses in all contact folders available to the particular user (including public folders).
- This version allows installation of the root certificate on the device — this implies that it is also possible to use the *Kerio Connect's* self-signed certificate for encryption.

*Mail For Exchange* does not support the following features:

- It is not possible to synchronize public and shared folders.
- It is not possible to accept/reject an invitation. Invitations can be viewed in *Inbox* but it cannot be manipulated — it does not offer the *Accept* and *Reject* buttons and it is not displayed in the calendar.

## 4.8 RoadSync

*Kerio Connect* supports the *RoadSync 2.0* application developed by *DataViz*. *RoadSync* enables synchronization between *Kerio Connect* and mobile devices.

*RoadSync* supports synchronization of the following folder types:

- Email,
- Calendar,
- Contacts,

The *RoadSync* application can be installed on the following mobile devices:

- Symbian UIQ,
- Symbian S80,
- Symbian S60 3rd Edition,
- Palm OS (synchronization is available for email only),
- Java MIDP 2.0 (synchronization is available for email only),

For details on *RoadSync* and supported devices, see the *DataViz* website at http://www.dataviz.com/.

## 4.9 Apple iPhone

### 4.9.1 Apple iPhone 2.0

This section addresses both *Apple iPhone 3G* and *Apple iPhone 1.0* with the OS X 2.0 firmware.

In additions to all options available also for OS X 1.0, *Apple iPhone* with OS X 2.0 supports the ActiveSync protocol for direct data synchronization. This implies that now *Kerio Connect* in cooperation with *Apple iPhone 2.0* provides the following options:

- *Apple iPhone* allows synchronization of:
  - email,
  - calendar,
  - contacts.
- Apple iPhone fully supports the device clean-up feature, so called “Device Wipe”. In short, the device can be cleared (deletion of all data and settings) remotely in case that it gets lost or stolen.

> ***Warning:***
> If you happen to lose your *Apple iPhone* or it gets stolen, contact your network administrator immediately to get the device wiped remotely.

- DirectPush Technology — this technology allows mobile devices to keep open HTTP(S) connection with the server. Whenever a new item is received or any change is performed in any folder, changes are synchronized immediately.
- Global Address Lookup — this feature allows look-up of email addressed in contact folders.

### *Account settings*

To configure ActiveSync (Exchange), follow these guidelines:

1. In *Apple iPhone*, go to *Settings* → *Mail, Contacts, Calendars*.
2. Select *Add Account*.
3. Select the *Microsoft Exchange* account type.
4. Enter the following account data:

   **Email**
   Enter the primary email address consisting of username and domain (e.g. `jflyhigh@company.com`, where jflyhigh is a username and company.com is an email domain).

   **Server**
   Enter DNS name of *Kerio Connect*.

   **Username**
   Enter username for login to your *Kerio Connect* mailbox.

   **Password**
   Enter password for your mailbox.

   **Description**
   This is an optional entry. The description is helpful especially if you intend to use multiple accounts.

   **Use SSL**
   This option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.
   To enable traffic encryption, it is necessary that an SSL certificate is installed in *Kerio Connect*. To get the certificate, go to the *Kerio WebMail* login page in *Safari* (see section 1.2) and click on *Download SSL certificate*.

5. In the dialog opened, select which folder types will be synchronized. Uncheck only items you would really not use.

6. Once the settings are saved, the *Mail days to sync* item appears — open it and set how old items will be involved in synchronization. This measure helps avoid that the synchronization takes too long and that too much needless data is downloaded.

At the end, set how often the synchronization will be performed. This can be done in *Settings → Fetch New Data*. On the *Advanced* tab, you can also find setting of synchronization type for your Exchange account.

### 4.9.2 Apple iPhone 3.0

In *Apple iPhone OS 3.0*, all features of previous *Apple iPhone OS* versions are available.

Newly, the following features have been introduced for *Apple iPhone*:

- CalDAV protocol (allows calendar synchronization),
- standard iCalendar (allows to download shared and public calendars for reading),
- LDAP protocol (allows to access contacts via LDAP).
- support for ActiveSync 12.1 (allows direct search in emails stored in *Kerio Connect* via Exchange account).

> ***Warning:***
> Once the upgrade is completed successfully, it is necessary to remove and reconfigure the Exchange account, otherwise the device will keep attempting to connect to *Kerio Connect* via *ActiveSync* 2.5

In addition to features described above, the system introduces other improvements, such as:

- the Copy&Paste method both for text and graphic items during email composition,
- while composing an email message, it is possible to switch the client to the horizontal position,
- notifications of new email delivered to other folders than the Inbox,
- creating and sending invitations from ActiveSync account (including showing of availability of individual users),
- notes synchronization with desktop applications *Apple Mail* and *MS Outlook* via *Apple iTunes*.

For details on individual enhancements and their implementation options, refer to the Apple website. In the following sections, you will find settings applying to the very communication with *Kerio Connect*:

### *Configuration of CalDAV account*

To configure CalDAV account, follow these guidelines:

1. In *Apple iPhone*, go to *Settings* → *Mail, Contacts, Calendars*.

2. Select *Add Account* → *Other* → *Add CalDAV Account*.

3. Enter the following account data:

   **Server**
   Enter DNS name of *Kerio Connect*.

   **User**
   Enter username for login to your *Kerio Connect* mailbox.

   **Password**
   Enter password for your mailbox.

   **Description**
   This is an optional entry. The description is helpful especially if you intend to use multiple accounts.

4. Click on *Next* to open the *Unable to Verify Certificate* dialog. If you continue, the connection either fails due to the server's security policy or it is established successfully but the traffic is not protected from tapping. Therefore, it is strongly unrecommended to use unencrypted traffic. To switch to secured connection, click on *Cancel* and go to *Advanced Settings*:

   **Use SSL**
   This option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.
   To enable traffic encryption, it is necessary that an SSL certificate is installed in *Kerio Connect*. To get the certificate, go to the *Kerio WebMail* login page in *Safari* (see section 1.2) and click on *Download SSL certificate*.

   **Port**
   Default ports for communication must be changed as follows:
   For HTTPS: 8443 → 443 (to enable the *Use SSL* option, use port 443)
   For HTTP: 8008 → 80

*Note:*
The settings apply if standard ports for HTTP protocol are set on the server. If connection to the server with these settings fails, contact your network administrator an check that non-standard ports are not used for *Kerio Connect* traffic.

**Account URL**
Enter URL of the calendar account including the port number specified in the *Port* entry.
For example, the URL will be as follows for domain *company.com* and port *80*:

- *for your personal account*:
  `http(s)//mail.company.com:80/caldav`
- *for a shared calendar of user `wsmith`*:
  `http(s)//mail.company.com:80/caldav/users/company.com/wsmith`
- *for the calendar of the resource `car1`*:
  `http(s)//mail.company.com:80/caldav/users/company.com/car1`
- *for public calendar*:
  `http(s)//mail.company.com:80/caldav/users/company.com/.public`

To view new calendars, go to the *Calendar* application by clicking on *Calendars*. In the list, simply click on the calendar you want to open.

### *Subscription to calendars*

To subscribe calendar in the iCalendar format, follow these steps:

1. In *Apple iPhone*, go to *Settings* → *Mail, Contacts, Calendars*.
2. Select *Add Account* → *Other* → *Add Subscribed Calendar*.
3. Enter the following account data:

   **Server**
   Insert URL in this pattern: `servername/ical`
4. If the account authentication fails, check the following items:

   **Server**
   Enter URL in a format compatible with calendar subscription. Basic URL follows this pattern: `servername/ical` The basic URL can be used to subscribe to the main calendar of your account. To subscribe to other calendars, use the following (derived) URL patterns:
   `servername/ical/users/domain/user@domain` — URL modified for the purpose of subscription to a shared calendar (e.g. `mail.company.com/ical/users/company.com/wsmith@company.com`).
   `servername/ical/users/domain/room@domain` — URL modified for the purpose of subscription to a resource calendar (e.g. `mail.company.com/ical/users/company.com/meetingroom1@company.com`).

**Description**
This is an optional entry. The description is helpful especially if you intend to use multiple calendars.

**User**
Enter username for login to your *Kerio Connect* mailbox.

**Password**
Enter password for your mailbox.

**Use SSL**
This option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.
To enable traffic encryption, it is necessary that an SSL certificate is installed in *Kerio Connect*. To get the certificate, go to the *Kerio WebMail* login page in *Safari* (see section 1.2) and click on *Download SSL certificate*.

**Remove alarms**
It is recommended to enable this option, as it will not be possible to disable alarms after having downloaded the calendar to the device.

To view new calendars, go to the *Calendar* application by clicking on *Calendars*. In the list, simply click on the calendar you want to open.

***Warning:***
Download of large shared or public calendars via slow connection (GPRS, EDGE) can result in temporary unavailability of the calendar to other users.

### *LDAP client configuration*

To configure LDAP account, follow these guidelines:

1. In *Apple iPhone*, go to *Settings* → *Mail, Contacts, Calendars*.
2. Select *Add Account* → *Other* → *Add LDAP Account*.
3. Enter the following account data:

   **Server**
   Enter DNS name of *Kerio Connect*.

   **User**
   Enter username for login to your *Kerio Connect* mailbox.

**Password**
Enter password for your mailbox.

**Description**
This is an optional entry. The description is helpful especially if you intend to use multiple calendars.

> ***Warning:***
> The application cannot read some types of SSL certificates, so it is recommended to connect only via an unsecured version of the LDAP protocol.

LDAP search is available in the *Contacts* application. Simply click on *Groups* to go to contact lists and select an item to view.

#### *Meeting scheduling and availability settings in Exchange account*

To create an invitation (for details on invitations and their use, refer to section 1.8.7), follow these instructions:

1. On *Apple iPhone*, run the *Calendar* application.
2. Create a calendar event.
3. Enter standard information, such as name and location of the event as well as its start and end times.
4. Click on *Invitees*.
5. Enter or select contact of persons to invite and click on *Done*.
6. Click on *Availability*.
7. Select free/busy mode of the appointment to be showed in your free/busy calendar.

### 4.9.3 Apple iPhone 4.0

In *Apple iPhone OS 4.0*, all features of previous *Apple iPhone OS* versions are available.

Newly, *Apple iPhone* supports synchronization of contacts via the CardDAV protocol.

#### *CardDAV account settings*

To configure CardDAV account, follow these guidelines:

1. In *Apple iPhone*, go to *Settings* → *Mail, Contacts, Calendars*.
2. Select *Add Account* → *Other* → *Add CardDAV Account*.

3. Enter the following account data:

   **Server**
   Enter DNS name of *Kerio Connect*.

   **User**
   Enter username for login to your *Kerio Connect* mailbox.

   **Password**
   Enter password for your mailbox.

   **Description**
   This is an optional entry.

4. Upon clicking on *Save*, iPhone attempts to establish connection.

   By default, iPhone is set to encrypted traffic (HTTPS) on standard ports. If connection over HTTPS fails, iPhone attempts to connect via HTTP (unsecured connection).

   If connection to the server fails, contact your network administrator an check that non-standard ports are not used for *Kerio Connect* traffic. If they are, it is necessary to set ports manually.

   Go to *Advanced Settings* and set the following parameters:

   **Use SSL**
   This option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.
   To enable traffic encryption, it is necessary that an SSL certificate is installed in *Kerio Connect*. To get the certificate, go to the *Kerio WebMail* login page in *Safari* (see section 1.2) and click on *Download SSL certificate*.

   **Port**
   Set ports for HTTP and HTTPS traffic by using information provided by your network administrator.

New contacts are located in the *Contacts* application. To get there, click on the *Contacts* button.

CardDAV account can be used for synchronization of the user's personal contacts — shared and public contacts are not involved in the synchronization.

## 4.10 Apple iOS

*Kerio Connect* now comes with an autoconfig tool for *iOS* systems. This tool enables simple setting of automatic synchronization of:

- mailboxes
- contacts
- calendars

How to use the autoconfig tool?

1. In a browser running on an iOS system, enter the address of your mailserver. On the login page, click on *Set up my phone* (below the login dialog — see figure 4.31) and then on *Mail, Contacts, Calendars*.

**Figure 4.31** iOS configuration

2. To create an *Exchange ActiveSync* account, click on *Continue*.

   *Note:*
   For your security, it is recommended to use secured connection.

   > ***Warning:***
   > To configure your device with *CalDAV*, *CardDAV* and *IMAP*, use the link below the *Continue* button.

3. This opens the installation page (see figure 4.32). Click on *Install* to run installation. You will be asked for your account's password.

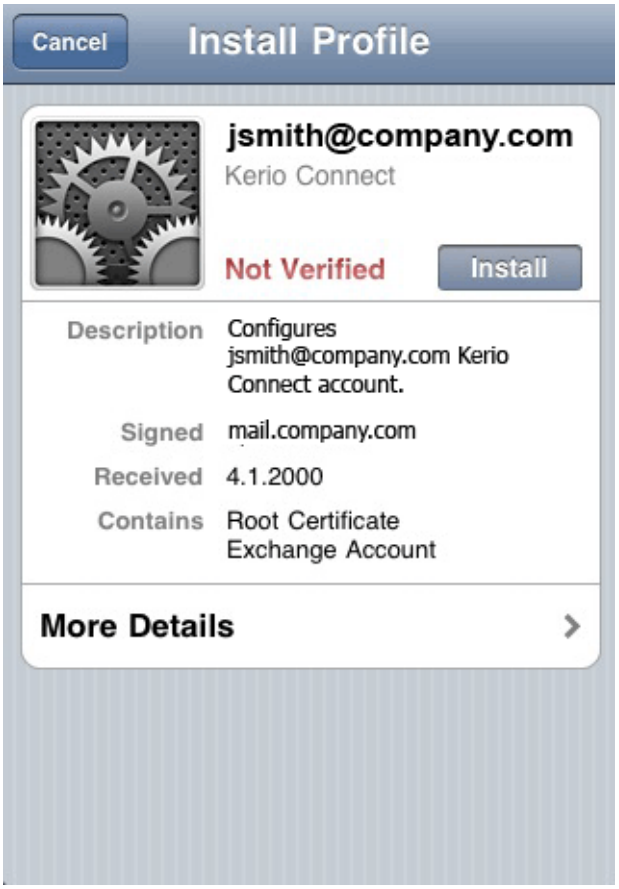


**Figure 4.32** Installation page

You can click on *More details* to view what will be included in the installation.

4. Once the installation is completed, you can start using your mailbox immediately.

Chapter 5

# Kerio Outlook Connector (Offline Edition)

*Kerio Outlook Connector (Offline Edition)* — referred as *Kerio Outlook Connector* — an *MS Outlook* extension allowing strong cooperation of the *Kerio Connect* with *MS Outlook*. This cooperation provides the following options:

- Email, events, notes, contacts and tasks are stored in *Kerio Connect*. Therefore, they are available via the Internet from anywhere. You can connect either by *MS Outlook*, by *Kerio WebMail* or via another email client.
- *MS Outlook* can be switched to offline mode. This implies that you can manage your email items also from home or on your business trips. This means that your email can be managed even there where the Internet connection is too slow or there is no connection at all. After reconnection to the Internet (switching to online mode), *Kerio Outlook Connector* synchronizes all changes with the mailserver and sends mail from *Outbox*.
- *Kerio Outlook Connector* supports folder management.
- In calendars, meeting scheduling and, in task folders, assigning of tasks to other persons are supported.
- *Kerio Outlook Connector* allows setting of rules for incoming email. These rules are stored at the server, so they are applied globally — i.e. mail will be sorted in the same way in *Kerio WebMail* and other email clients.
- Along with *Kerio Connect*, *Kerio Outlook Connector* provides a proprietary antispam strategy.
- *Kerio Outlook Connector* allows searching in message bodies.
- *Kerio Outlook Connector* provides support for message grouping.

*Note:*
This chapter describes:

- such *MS Outlook* settings that are related to *Kerio Outlook Connector*. For information on *MS Outlook* features and settings, refer for example to http://office.microsoft.com/en-us/outlook-help/outlook-help-and-how-to-FX101816808.aspx.
- settings in *MS Outlook 2007*. It can, therefore, slightly differ on older versions of *MS Outlook*.

## 5.1 Installation

At Kerio Technologies website, you can find:

- versions of operating systems supported by the *Kerio Outlook Connector* installation,
- supported versions of *MS Outlook*.

To get the *Kerio Outlook Connector* installation package, follow these guidelines:

1. In your browser, enter your mailserver's URL address following the pattern `http://server_name/` (e.g. `http://mail.company.com/`).
2. If the address is correct, the *Kerio WebMail* login page is opened. Click on the *Integration with Windows* link displayed at the bottom of the login dialog.
3. This opens the *Integration with Windows* page. Simply click on *Download Kerio Outlook Connector*.

Installation wizard is used for the *Kerio Outlook Connector* installation. Once the installation is completed, it is necessary to set a profile and an email account explicitly (see section 5.1.2).

***Warning:***

- *MS Outlook* must be installed and at least once started on the computer prior to the *Kerio Outlook Connector (Offline Edition)* installation. otherwise the application will not function properly.
- When the upgrade or downgrade of *MS Outlook* is performed, *Kerio Outlook Connector* must be reinstalled manually.
- If you have used another mailserver (e.g. Exchange) and now you are switching to *Kerio Connect*, it is necessary to create a new profile in *MS Outlook*.

### 5.1.1 Installation on computers where Kerio Outlook Connector has been installed

In the majority of cases, upgrade from *Kerio Outlook Connector* to *Kerio Outlook Connector (Offline Edition)* is smooth. At the beginning of the installation, a convertor is started which converts all Kerio profiles of the particular user to profiles for *Kerio Outlook Connector (Offline Edition)*. If the station is connected to the *Kerio Connect*, the *Kerio Outlook Connector's* local database is created automatically and updated (referred simply as *Kerio Outlook Connector*).

Special cases:

**One workstation is shared by multiple users**

If a workstation is used by multiple users, install the program once and then run the convertor (*Start* → *Programs* → *Kerio* → *Outlook Profile Conversion Utility*) for each user.

**Kerio Outlook Connector is installed without connection to Kerio Connect**

In such cases profiles are converted, but they must be finished upon connecting to the server:

1. In the profiles dialog (*Start* → *Settings* → *Control Panel* → *Mail* → *View Profiles*), select the Kerio profile and click on *Properties*.
2. In the wizard, click on *User Accounts*.
3. On the following page, double-click on the Kerio account and confirm settings by the *OK* button. Conversion to *Kerio Outlook Connector* profile is then finished automatically.

This procedure must be taken for each profile with Kerio account.

### 5.1.2 Profile and Email account settings

In *MS Outlook*, any number of user profiles can be created. Using of multiple user profiles is essential especially in the following situations: either the computer is accessed by multiple users and each of them needs his/her own email address or a user can access multiple mailboxes and wants to use different settings for each of them. In other cases, one profile for one or more email accounts is sufficient.

> ***Warning:***
> Only one *Kerio Outlook Connector* account is allowed in each profile.

#### *Automatic configuration*

For automatic configuration of profiles, there is a special tool called *ProfileCreator*. To get and start it, follow these guidelines:

1. In your browser, enter your mailserver's URL address following the pattern `http://server_name/` (e.g. `http://mail.company.com/`).

2. If the address is correct, the *Kerio WebMail* login page is opened. Click on the *Integration with Windows* link displayed at the bottom of the login dialog.

3. In the *Integration with Windows* page just opened, click on *Click here to auto-configure Kerio Outlook Connector*.

4. Nástroj uložte a spusťte poklikáním na jeho ikonu.Save the tool and run it by double-clicking on its icon.

5. The script now creates a new profile and pre-configures your Kerio account.

6. Click on *Retrieve Info* in the configuration to check whether the password is correct and whether the login data can be used for connection to the server.

### *Manual configuration*

Settings for a new profile can be configured in the *Start* → *Settings* → *Control Panel* → *Mail* menu:

1. In the *Email Settings* dialog, select the *Show Profiles* button.
2. Click on the *Add* button to create a new profile and enter its name. Any name can be used.
3. This opens the email account wizard, where a new account can be created. In the dialog, simply enable the *Manually configure server settings or additional server types* option.
4. In the *Choose e-mail service* dialog, select the *Other* option and enable *Kerio Connect (KOC Offline Edition)* (see figure 5.1). Click on *Next*.

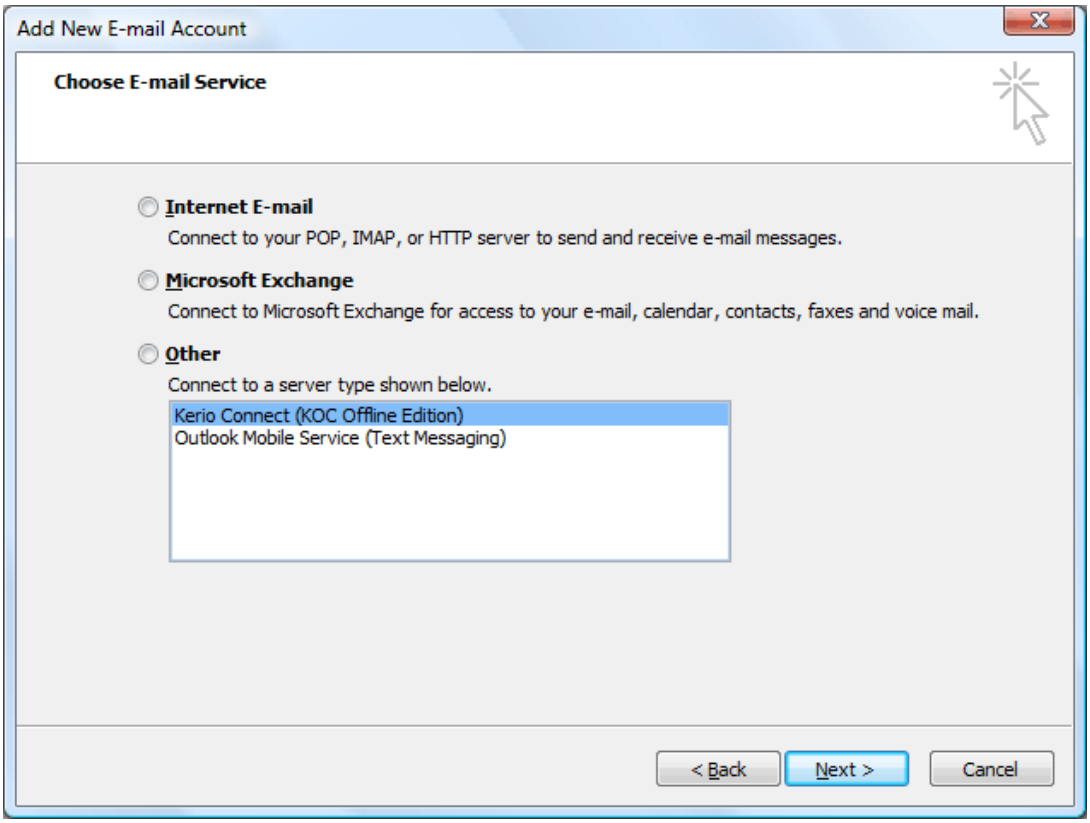


**Figure 5.1** New account settings — e-mail service selection

5. On the *Accounts* tab set basic parameters for connection to the mailserver (see figure 5.2):

   **Server Name**

   DNS name or IP address of the mailserver (for help, contact your network administrator).

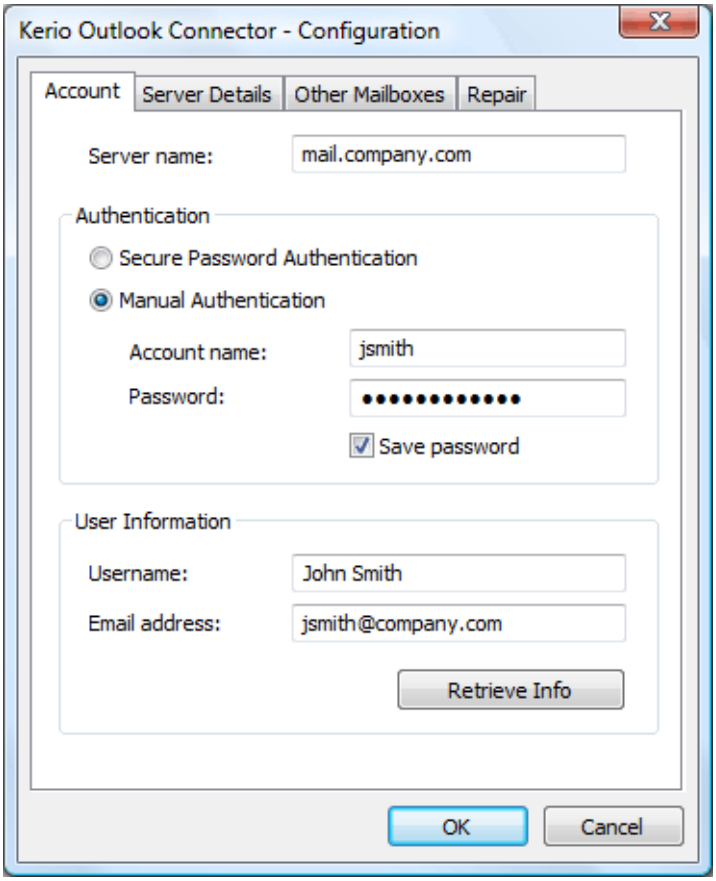


**Figure 5.2** New account settings

**Secure password verification**

This option allows using the NTLM authentication. When checked, users are not required to set usernames and passwords — authentication against domain will be used instead.

To make the SPA authentication work, both the computer as well as the user account have to be parts of the domain used for authentication.

**Username**

Username used for logging to the mailserver. If the user does not belong to the primary domain, afull user name including domain is required (`jwayne@company.com`).

**Password**

Enter your username.

**Save password**

If you check this option, *MS Outlook* will remember your password and you will not be asked to enter it again from that time on. If there are multiple persons that access the computer, it is not recommended to check the option for security reasons.

Press the *Retrieve Info* button to test if correct user data has been specified and if the connection to *Kerio Connect* works properly. If the test is finished successfully, a corresponding *User Name* and *Email Address* are automatically filled in.

6. By default, any traffic between *Kerio Connect* and *MS Outlook* is secured by SSL. If there are no problems encountered regarding encrypted traffic, it is recommended to keep settings unchanged.

### 5.1.3 Automatic updates

Updates of *Kerio Outlook Connector* are performed automatically. In addition to this, update check for new versions of *Kerio Connect* and *Kerio Outlook Connector* is performed upon each startup of *MS Outlook*. If a new version is available or the versions are different on the server and the client, a recommendation for update of *Kerio Outlook Connector* appears. Once this dialog is confirmed, update is performed, followed by an automatic restart of *MS Outlook*. The whole update including restart should take up to two minutes, depending on connection data-flow speed.

## 5.2 The Online/Offline mode

*Kerio Outlook Connector* supports both modes, online and offline. Online mode is the standard *MS Outlook* mode which requires connection to *Kerio Connect*. Offline mode allows running of *MS Outlook* and working there without connection to *Kerio Connect*. This requires all email, events, tasks, etc. being stored in the local message store on the client station. Upon connection to *Kerio Connect*, it is possible to synchronize changes with the corresponding account in *Kerio Connect*.

The offline mode is helpful especially for users with notebooks who make frequent business trips and need their email accounts even when they are not currently connected to the Internet. Upon switching to online mode, all new messages, events and tasks are synchronized with the server's store automatically.

*Kerio Outlook Connector* informs of switching between online and offline modes and about current synchronization progress and status by a special icon in the systray's notification area (see figure 5.3). The icon informs about the following situations:

**Figure 5.3** Synchronization status — online / synchronization / offline

- Synchronization in progress — a blue right-pointing arrow is displayed at the icon.
- *MS Outlook* is running in the offline mode — red down-arrow is displayed at the icon.

### 5.2.1 Offline mode settings

By default, the online mode is set in *MS Outlook*. To switch to the offline mode, click on *Work offline* in the *File* menu available on the main toolbar.

If *MS Outlook* loses connection to *Kerio Connect*, it is automatically switched to the offline mode.

If you close *MS Outlook* in the offline mode, it will be opened in offline mode next time it is started. If you want to change this, disable the offline mode manually in the *File* menu.

### 5.2.2 Synchronization

Upon startup of *MS Outlook*, the currently opened folder is primarily synchronized.

Any folder saved in *Kerio Connect* can be synchronized in any of these two modes:

- Full synchronization of the folder.
- Synchronization of header and message body in plain text — this option concerns synchronization of smaller data volume. However, it is necessary to decide whether you will not miss possible attachments in your email. When connected online again, the attachments are included in corresponding messages anyway.

In default mode, synchronization of *Kerio Connect* and the *Kerio Outlook Connector* works as follows:

- Inbox — whole messages are synchronized.
- Other email folders — only message headers and body in plain text are synchronized.
- Events — whole events are synchronized.
- Contacts — whole contacts are synchronized.
- Tasks — whole tasks are synchronized.
- Notes — whole notes are synchronized.

> ***Warning:***
> Archive folders are not showed by the *Kerio Outlook Connector (Offline Edition)*. Therefore, they are not synchronized either.

Default synchronization mode can be changed (adjusted) in properties of individual folders:

1. Right-click the selected folder and choose *Properties* from the pop-up menu.
2. In the *Properties* window switch to the *Folder Synchronization* tab (see figure 5.4).

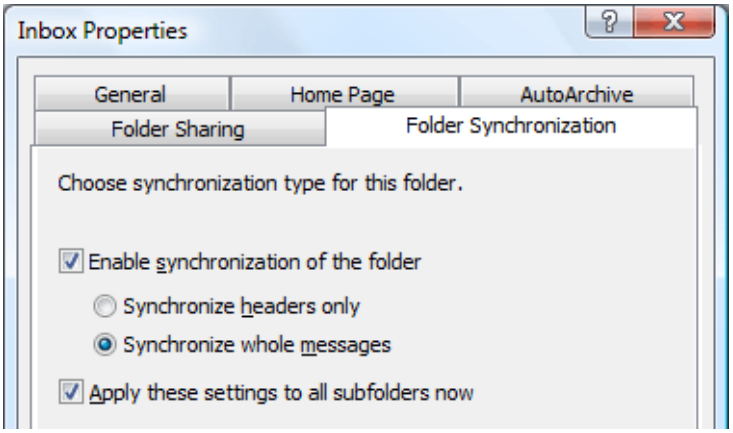


**Figure 5.4** Folder synchronization settings

***Warning:***
If you do not wish to synchronize the folder, disable the *Enable synchronization of the folder* option. However, any items already included in the folder will be kept synchronized.

### *Conflicts*

Synchronization conflict occurs when a message, event or any other item is changed both on the server and in *Kerio Outlook Connector* in the time between synchronizations. In such cases, the *Kerio Outlook Connector* is not capable of recognizing which change is the wanted (later) one.

If a conflict occurs during the synchronization, the item saved on the server beats the other one. The winning item is saved in the corresponding folder. The beaten item is saved in a special folder called *Conflicts*. This folder is available only in *MS Outlook*. This implies that it is not available in *Kerio WebMail* or another email client.

Both items can be compared to select the correct one. If the server have primarily selected the wrong version (the older one), it is possible to move it from the *Conflicts* folder to the correct directory manually and simply remove the other version.

Each conflict is announced by a special message sent to *MS Outlook*. Its subject is *Message in conflict!*. Conflict information includes name of the message, event, contact or another item in conflict and its location in mailbox (folder). Local version of the item is moved to the *Conflicts* folder. If this version is up-to-date, exchange it with the version in the particular folder.

## 5.3 Contacts

This section provides information on which actions besides creating, editing and removing of contacts are available with *Kerio Outlook Connector*.

### 5.3.1 Searching in address books via the MAPI interface

*MS Outlook* extended by the *Kerio Outlook Connector* enables searching through the *MS Outlook Address Book* via the MAPI interface.

*Outlook Address Book* is a special directory allowing search email addresses where addresses are filled in automatically. Addresses are filled in automatically for example when an address is being specified during a new mail composition. Simply enter initial characters of the first or second name string to the *To:*, *Cc:* or *Bcc:* entries to make the client search for matching items and fill the address in automatically. If multiple email addresses matching the string are found, a menu is opened where you can select from the options.

To avoid misunderstandings, the following terms must be explained:

- *Outlook Address Book* — a special folder where *MS Outlook* looks up email addresses (e.g. when addresses are filled in automatically or where email addresses are searched by first or second names).

  Unlike a contact folder, the address book does not include additional information to first and second names and the corresponding email address. Address books are simple lists of possible recipients of email, meetings and delegated tasks.

- Contacts — the folder including user contacts. These folders can be private, public or it is possible to subscribe a shared folder. Each contact item includes first name, second name and additional info such as address, phone numbers, email addresses, dates of birth, etc. Address books do not include this information.

In *MS Outlook*, any contact folder can be added as a directory to *Outlook Address Books*. All contact items included in the subscribed contact folders will then be searched through when the function of automatic completion of email addresses is applied.

Once a contact folder is added, full names and an email addresses of all contacts included in the particular folder are added to the address book. Other information associated with contacts are not transferred to address books. It is not possible to search in contacts (address book) for example by date of birth or department.

> ***Warning:***
> The search criteria is first and second names in contacts (the *Full name* item). It is not possible to search by usernames or email addresses.

Connection of a folder as a directory does not influence the contact folder. The data is not changed or moved. Each contact folder can be used as before — it is possible to add, remove and contacts, etc. The only effect is that whenever a new contact is added, its first name and surname and email address will be added also to the address book.

By default, searches are performed in the *Outlook Address Book* directory. Administration of *Outlook Address Book* is available through the *Address Books* tab under *Tools* → *Account Settings* (see figure 5.5).

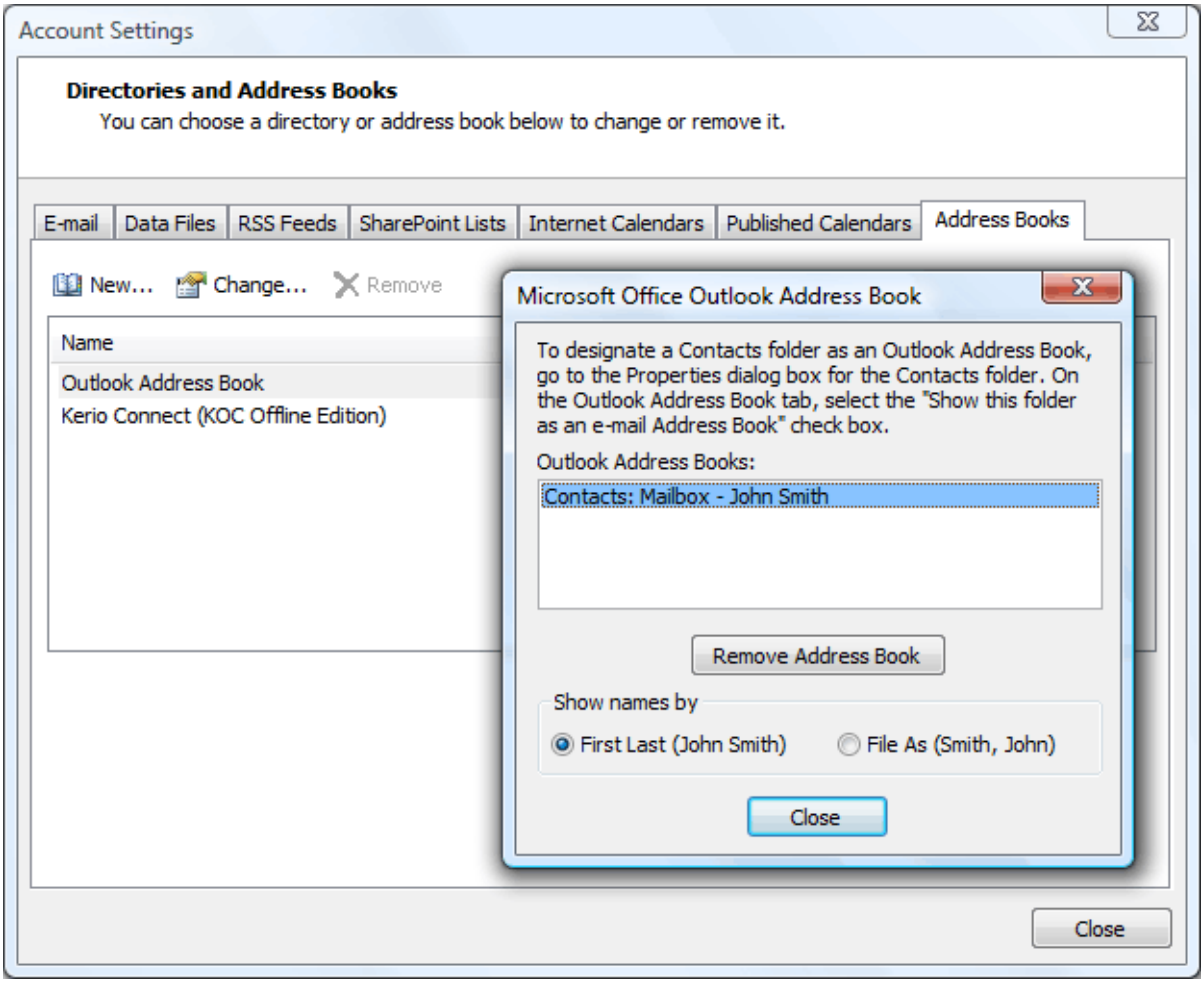


**Figure 5.5** Address Book

It is possible to add to the *MS Outlook Address Book* any folders with contacts where lookup should be performed.

The following settings must be done for addition of a contact folder as a directory:

1. Right-click on the contact folder.
2. In the context menu, select *Properties...*
3. This opens a dialog where the contact folder properties can be edited. Open the *Outlook Address Book* tab (see figure 5.6).
4. Enable the *Show this folder as an e-mail Address Book* option and click OK to save settings.

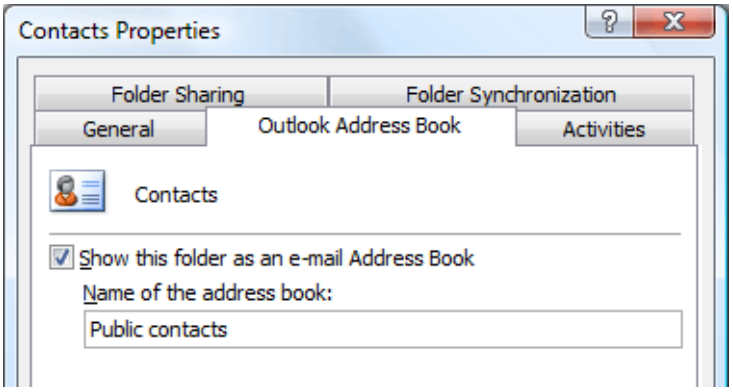


**Figure 5.6** Show this folder as an e-mail Address Book

## 5.4 Calendars

This section describes which actions, besides creating, changing and removing of events, allow connection between *MS Outlook* and *Kerio Outlook Connector*. There is no doubt that the main advantage is the option of meeting scheduling and management of web calendars (only in *MS Outlook 2007*).

### 5.4.1 Appointments

Meeting is a special type of calendar event allowing adding and management of other attendees (for details, refer to chapter 1.8.7).

1. Open a new event dialog to enter subject and site where the event (meeting) will take place.
2. Click on *Scheduling*.
3. and enter individual participants of the meeting (see figure 5.7). When attendees are added, free time of individual attendees is displayed in contrast with level of their busy-ness shown by blue color (*MS Outlook* does not support viewing of user busyness level). The users with no data on the free/busy server (users with no account, users that do not use the calendar) are marked with hatch. Colors are explained in the key at the bottom of the window.

   > ***Warning:***
   > It is necessary to specify each user by their usernames and domains (`username@domain`). Aliases cannot be used to display *Free/Busy* information.

4. The slide window in the schedule shows the time of the suggested meeting marked by a green and a red vertical line where the time range should start and end.

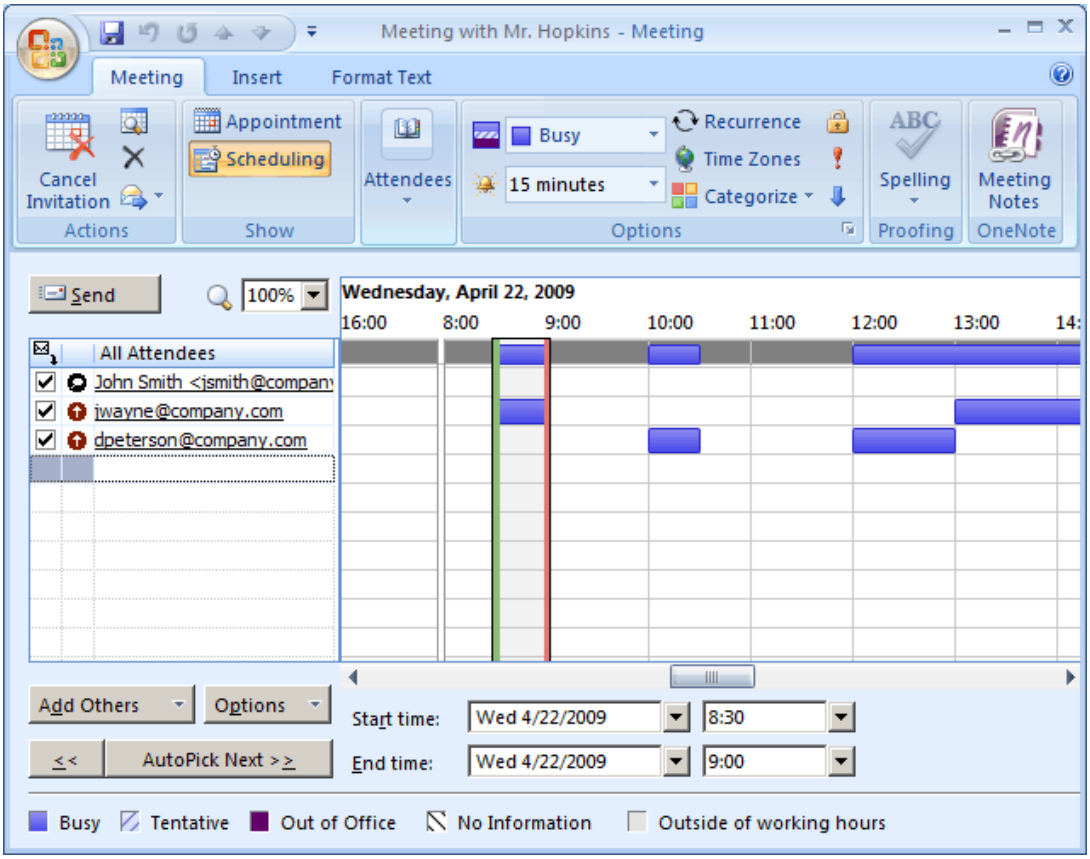


**Figure 5.7** Usage of the Free/Busy calendar

### *New appointment*

Meetings are created in a similar way as events:

### *Free/Busy server's security*

Traffic between the *Free/Busy* server and *MS Outlook* can be secured by SSL encryption. This requires SSL encryption to be enabled in the account settings and the *Kerio Connect's* SSL certificate to be installed. For this purpose, you can use either a certificate issued by a trustworthy certification authority or a so-called self-signed certificate which can be generated in *Kerio Connect* (for details on certificates as well as their creation and authorization, refer to Kerio Connect 7, Administrator's Guide).

#### Enabling SSL traffic in account settings

In account settings (under *Tools* → *Account Settings*) on the *E-mail* tab, click on the *Kerio Connect (KOC Offline Edition)* account and in the account settings on the *Server Details* enable *Use secured connection (SSL)*.

#### Installation of the certificate in Internet Explorer

1. Run *Internet Explorer* and specify the corresponding URL to login to *Kerio WebMail*. SSL-secured protocol must be used for the connection to the server. This implies that the URL should start with `https://` (example: `https://mail.company.com/`).
2. A window reporting the certificate issue is opened. Click on *Continue to this website (not recommended)* to open the *Kerio Connect Administration/WebMail* login page.
   To avoid future certificate issues, it is necessary to install the certificate. Click on the *Certificate Error* → *View Certificate* option next to the welcome page URL. Use the *Install Certificate* button to start the installation wizard. When finished, the certificate gets installed.
3. In the dialog with certificate details displayed, click on the *Install certificate* button.
4. A certificate installation wizard is opened. There is nothing to be set in the wizard. Simply confirm all settings and close the wizard to install the certificate.

The other option is to download the certificate from page *Integration with Windows/Mac/Linux*. A link to this page can be found on the *Kerio Connect WebMail* login page. Click on *Download SSL certificate* to save or install the certificate on your computer.

### 5.4.2 Resources

*Kerio Connect* now provides an electronic management of resources shared by employees of your company. Resources are rooms and devices available in the company, such as OHPs, whiteboards, cars, etc. Resource management allows to:

- book a resource for a particular time,
- view current resources and their reservations in the Free/Busy server (for details on Free/Busy server and information on appointments, see section 5.4.1) when planning reservations,
- subscribe resource calendars by using standard sharing/delegation,
- set the resource manager who can decide on priorities in case of any collisions in reservations.

Resources can be booked by using the existing calendar system. Resource reservation is based on creating of en event. The feature works similarly as appointment scheduling. The main difference is that the *Attendees* tab must include the resource selected from the contact list (it can naturally also include contacts of attendees). In the *Free/Busy* calendar you can see whether the resource is available for the scheduled time or not.

*Note:*
To make a resource available for booking, it is necessary to create it in *Kerio Connect* first. If you need to create a new resource, contact your network administrator.

### *Resource reservation*

*Note:*
The settings described are provided for *MS Outlook 2007*. If you use another version, settings may differ slightly.

To book a resource, follow these instructions:

1. Open a new event and specify its subject.

2. Click on the *Scheduling* button in the new event's toolbar (see figure 5.8).

3. Add the resources email address to the list of attendees (e.g. `car1@company.com`). If you do not know the address of the resource, you can find it in the public contact folder called *Resources* (click on *Add Others* → *Add from Address Book* under *Resources — Public Folders*).

4. If the Free/Busy calendar is working, information about the source is shown in the right section of the dialog. It is therefore easy to check right away, whether the source is free or already booked by another user for the suggested time (see figure 5.8).

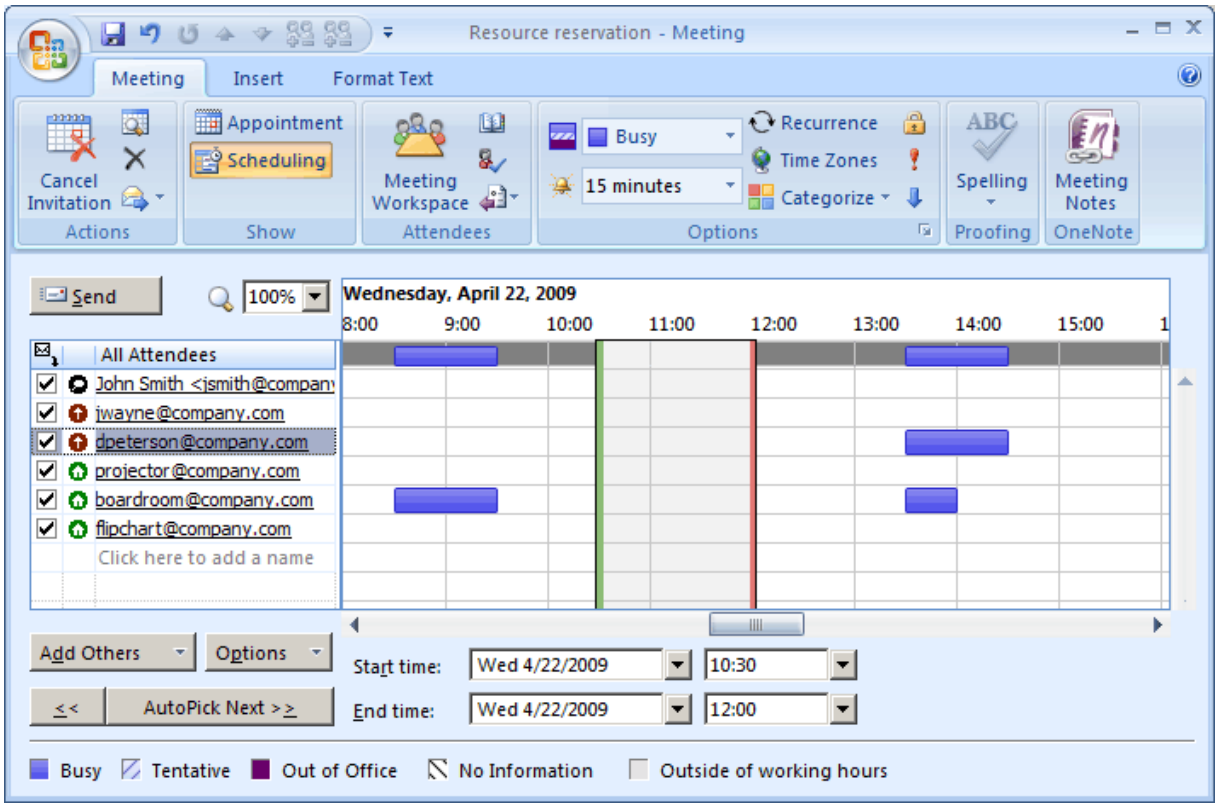


**Figure 5.8** Resource reservation

You may have noticed that there are also other attendees in the list shown in figure 5.8. Resources can be reserved either for usual appointment or for meetings (see section 1.8.7).

### *Resource calendar*

Each resource created in the system has its own calendar where all reservations are displayed. Calendars of individual resources can be subscribed through the standard sharing process (subscription of shared folders is focused in chapter 5.9.1).

Most user can access resource calendars in the read-only mode. Resource calendars can be edited only by the resource manager. The role of resource managers and their rights are addressed in the following section.

### *Reservation management*

In certain situations, it is necessary that a resource is booked even if it has already been reserved or that there is no other way than to make the reservation by a phone call. For such purposes, there exists a user with special rights for company resources management. Resource managers can access resource calendars with administration rights. This implies that they can edit, remove or move reservations in the particular resource calendar. They can also create new reservations.

If you are a resource manager, first it is necessary to subscribe calendars of all resources that you would manage:

1. Go to *Tools* → *Account Settings*.
2. Click on the Kerio account and press *Change*.
3. Go to the *Other Mailboxes* tab and click on *Add*.
4. In the *Attach Mailbox* dialog, enter source name including the domain (see figure 5.9).
5. If you are a manager of multiple resources, subscribe all calendars as described in steps 1 to 4.

Once subscribed, calendars of individual resources are shown in the folder tree. Each resource calendar now shows all reservations of the particular item done by any users. The resource manager can edit reservation time, add new reservations or remove them if demanded.

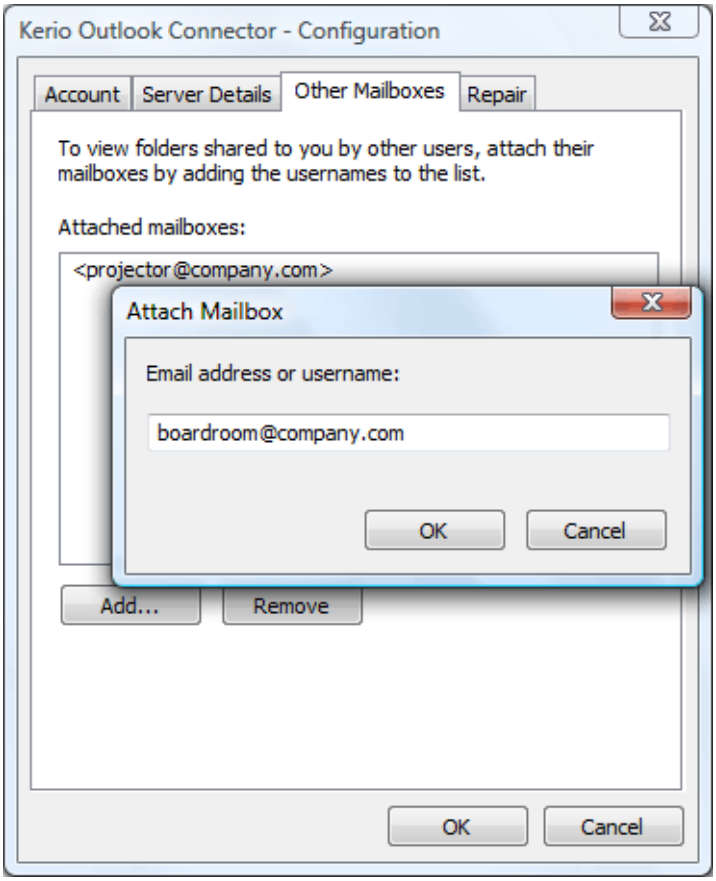


**Figure 5.9** Configuration dialog of the Kerio account — Other Mailboxes

## 5.5 Tasks

*Kerio Outlook Connector* supports storing of task folders in the *Kerio Connect's* store. This means that tasks can be accessed also via *Kerio WebMail* or another client application supporting task management over the Internet.

### 5.5.1 How to create tasks

*Kerio Outlook Connector* allows assigning of tasks to other persons. This tool is helpful for example to team leaders and managers who can delegate tasks to their subordinates who can later redelegate parts of the task to other persons.

One of the advantages of delegating of tasks to other persons is that the person who assigns the task is informed about the task's progress. Once the person to whom the task was assigned accepts the task, we keep being informed on the task's progress as well as of the task's completion at the end of the process. One task can be always assigned to one person only.

To assign a task, follow these instructions:

1. Create a new task.

2. On the *Task* tab in the toolbar, click on *Assign Task* (see figure 5.10).

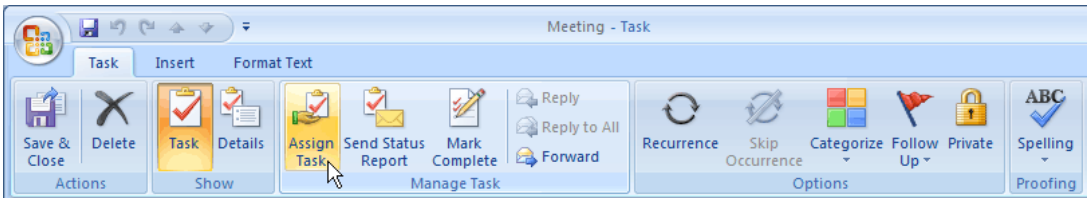


**Figure 5.10** Assigning of a task

3. This opens the *To* entry. Enter the email address of the person to whom you want to assign the task.

4. Click on *Send* to assign the task.

The task is now sent to the addressee's mailbox where it can be either accepted or refused by the mailbox user. If the task is accepted. it is moved to the *Tasks* folder automatically. Upon each update of the task's status, an email message with information on changes is sent to the person who created the task.

## 5.6 Notes

*Kerio Connect* supports note folders. This implies that note folders are stores on the server and you can access them also via *Kerio WebMail*.

These folders work the same as the other supported folder types:

- note folders are stored on the server in the folder tree,
- public note folders can be created,
- note folders can be shared with other users and it is also possible to set access rights for other users.

To learn what note folders are used for as well as how to handle them, refer to *MS Outlook* user guides.

## 5.7 Rules for incoming messages

*Kerio Outlook Connector* allows setting of rules for incoming email. These rules sort new email automatically in accordance with our criteria (settings). How does it work? If rules for incoming mail are not defined, all new email is delivered to the *Inbox* folder where we can read it and sort items to folders manually. Rules for incoming email simplify this complicated

procedure. The rules defined for incoming email sort incoming items automatically by using set criteria. Automatic sorting saves our energy and time. If you are too busy, you can simply read only the high-priority items, while leaving other email (e.g. mailing list responses) for later.

Rules for incoming email can be set under *Tools* → *Options*, on the *Kerio Connect* tab (see figure 5.11). On this tab, click on *Filtering Rules*. This opens the *Filtering Rules* dialog where new rules can be created or existing ones can be changed (for details, refer to section 5.7.1).

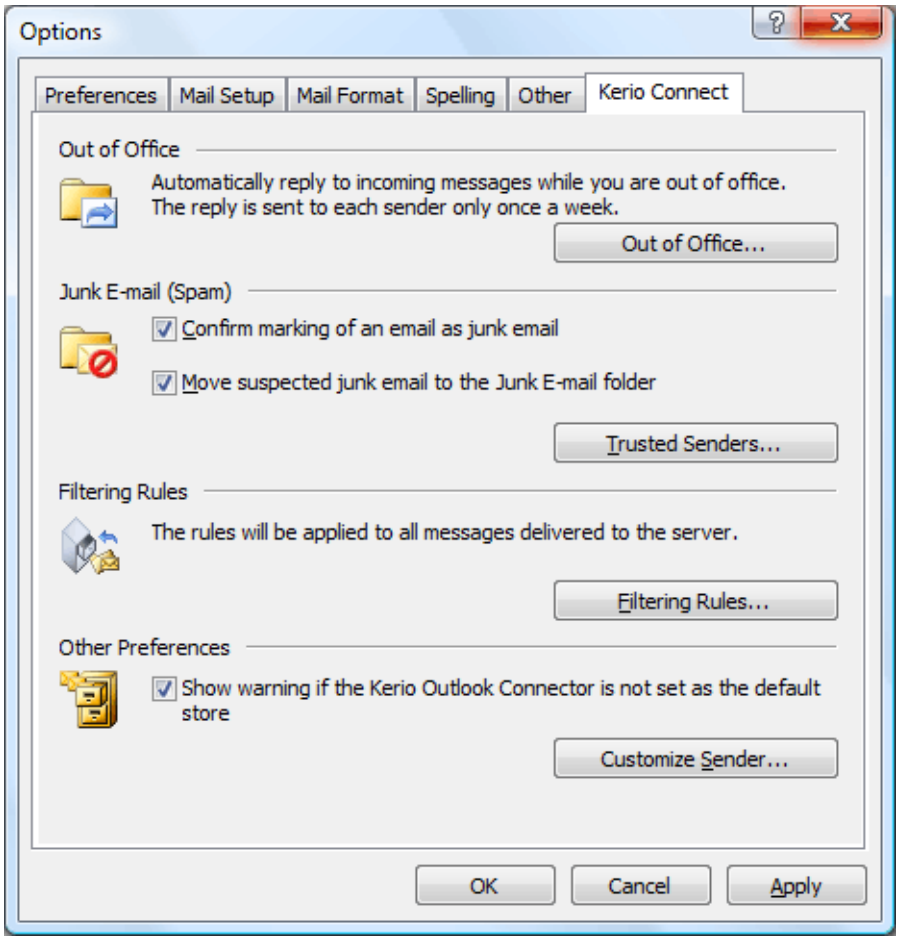


**Figure 5.11** Options — Kerio Connect

***Warning:***
After installation of the *Kerio Outlook Connector*, it will not be possible to use the standard *MS Outlook's* dialog for administration of rules for incoming mail and alerts Rules and alerts (under *Tools* → *Rules and alerts*).

### 5.7.1 Creating or changing a rule

New rules can be created under *Tools* → *Options*, on the *Kerio Connect* tab (see figure 5.11). Click on *Filtering Rules*. This opens the dialog where rules can be managed (see figure 5.12).

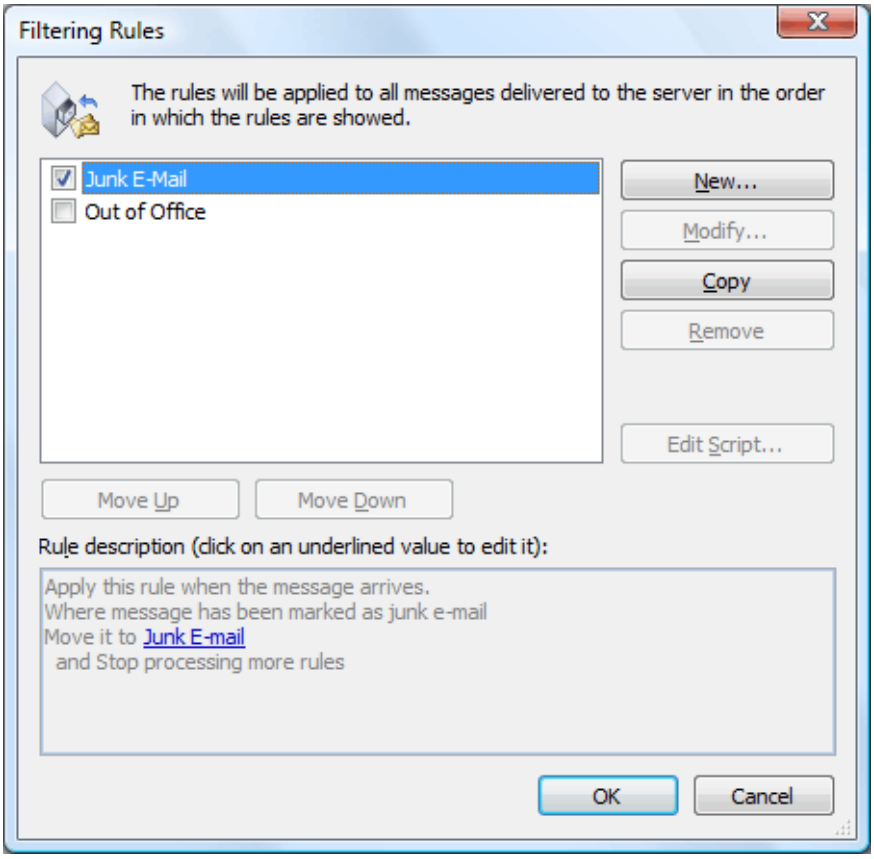


**Figure 5.12** The Filtering Rules dialog

The following buttons and functions are available:

- *New* — creates a new rule (see below).
- *Modify* — edits selected rule (see below).
- *Copy* — copies an existing rule. This rule must be renamed. This function can be useful when you intend to create a new rule that differs from the existing rule only in details.
- *Remove* — removes the selected rule.
- *Edit Script* — edits the rule source using the *Sieve* code (encoding used for sorting rules descriptions). We recommend you not to use this function unless you are experienced in the *Sieve* code.

Rules are tested from the top downwards. That means that it is necessary to be careful where the rule is placed to avoid the situation where one message would be copied to multiple folders. You can use the *Up* and *Down* buttons to move rules within the list.

The *Rules* tab may include two predefined rules which cannot be edited as described below. These rules are the *Spam* and *Out of office* rules.

The *Spam* rule moves any messages recognized by the server as spam to the *Spam* folder. If this rule is existing, it was created by the *Kerio Connect* administrator while creating the user account. To set this rule, go to the *Tools* → *Options* menu on the *Kerio Connect* tab. To learn more on this rule and related spam topics, refer to chapter 5.7.3.

The *Out of office* rule provides automatic answers to email messages where the recipients are absent to do it by themselves. To set this rule manually, go to the *Tools* → *Options* menu on the *Kerio Connect* tab. The rule is focused in section 5.7.2.

Use the *New* button to open the *Rule Editor* dialog which includes the following sections:

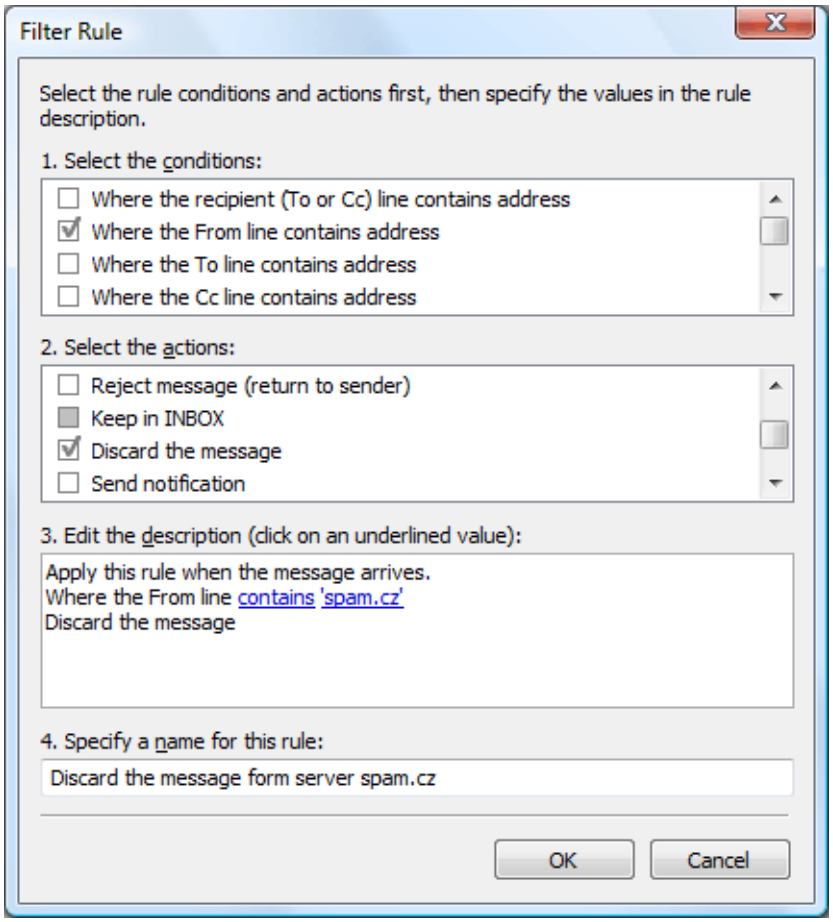


**Figure 5.13** Rule Editor

1. *Select the conditions for your rule* — conditions that must be kept so as the email administration meets this rule. One or more conditions from this list can be selected:

   **Where the recipient (To or Cc) line contains address**

   The To or the Cc (Copy To) entry includes defined string (email address). This means that messages will be sorted by recipient's address.

   *Usage example:* This is helpful when aliases are used to forward email to your address. For example, orders are sent in this way to sales@company.com. All messages with this address can be delivered for example to a folder labeled as *Orders*.

**Where the From line contains address**

The From entry includes defined string (email address).

*Use example:* This option is useful if you want to save or forward messages from a particular sender (or more senders) to a single location.

**Where the To line contains address**

The To entry includes defined string (email address).

*Use example:* See *Where the recipient (To or Cc) line contains address*.

**Where the Cc line contains address**

The Cc (Copy To) entry includes defined string (email address).

*Use example:* See *Where the recipient (To or Cc) line contains address*.

**Where the Sender line contains address**

The `Sender` entry includes the string. This entry is often contained in messages sent automatically (mailing lists, etc.) where it stands for the `From` entry.

**Where the Subject contains specific words**

The *Subject* entry contains defined string(s).

*Use example:* This option is useful for example for mailing list email where messages contain the mailing list's name.

*Note:*

*Kerio Connect* spam filter can be set so that the Subject entry will include results of antispam tests (the value is represented by asterisks). Using this feature spam may be filtered easily. Simply insert the number of asterisks that will specify the rule. Messages that match this rule will accept this specification.

**Where the message has an attachment**

At least one attachment must be appended to the message.

*Use example:* It is useful when combined with the *Where the message size is more/less than size* condition if a quota is applied to the mailbox and all messages larger than the set limit should be sent to another mailbox where you have enough space.

**Where the message size is more/less than size**

The message size exceeds the specified value. To specify the size you can select from the following units: bytes (*B*), kilobytes (*KB*) and megabytes (*MB*).

*Use example:* It is useful if a quota is applied to the mailbox and larger messages should be sent to another mailbox where you have enough space.

**Where the message was detected as a spam**

Spam are undesirable messages sent to users. You can use the *Kerio Connect* antispam filter to protect your users from such messages. This filter uses special header items which include message evaluation and information about applied antispam testing.

**For all messages**
This rule is valid for all incoming messages.

2. *Select the Actions for your rule* — select an action that will be taken for messages matching with condition in section *1*

**Move the message to a specified folder**
Move the message to the selected folder (you can choose a folder from a list).

**Forward the message to an address**
Forward to a specified address. In this case no other actions are performed.

**Reject message (return to sender)**
The message will not be stored in a local mailbox and the user will never be informed about it.

**Keep in Inbox**
This action must be combined with another (i.e. with *Move*, *Forward*, *Reject*, etc.). It cannot be combined with the *Discard the message* action.

**Discard the message**
The message will not be stored in any local folder. This action cannot be combined with the *Keep in INBOX* action (these two actions are contradictory).

**Send notification**
Sends notification (i.e. a short text message) to a specified address, typically to a cellular phone. It is necessary to define even cellular phones by email addresses, for example john.bluemonday@t-mobile.com.
The following macros can be used in the message text:

- `$from$` — the notification will show the message sender or the address contained in the *From* field.
- `$from-name$` — the notification will show the name of the message sender.
- `$subject$` — the notification will show the message subject.
- `$text$` — the notification will show the message text. Only the first 128 characters will be displayed. To reduce the number of displayed characters, edit the macro as follows: `$text[50]$` (the number in brackets represents the maximum number of characters displayed in the notification).
  The recommended text for notifications: From: $from$, Subject: $subject$, Message body: $text$
  *Note:*
  To display correctly on mobile phones, any diacritics is removed from the delivered notification.

**Send autoreply**
The automatic reply with a specified text. The automatic reply will be sent to each sender's address only once a week (so that the automatic reply does not create a loop in case there is an automatic reply set at the other end).

**Stop processing more rules**

If the message complies with this rule, no more rules will be processed. Using this function a user can create more complex rule systems for individual condition types. Rules are tested rule by rule from the top downwards.

*Note:*
Notifications and autoreplies are protected from loops. This means that the system does not send a notification in reply to received notification or automatic replies. The detection of notification or automatic replies is performed using special items in the message header. Only notifications and automatic replies generated by *Kerio Connect* are detected.

3. *Rule description* — description of the rule function (it is generated automatically according to the rule definition). Highlighted entries are interactive — click them to set other parameters.

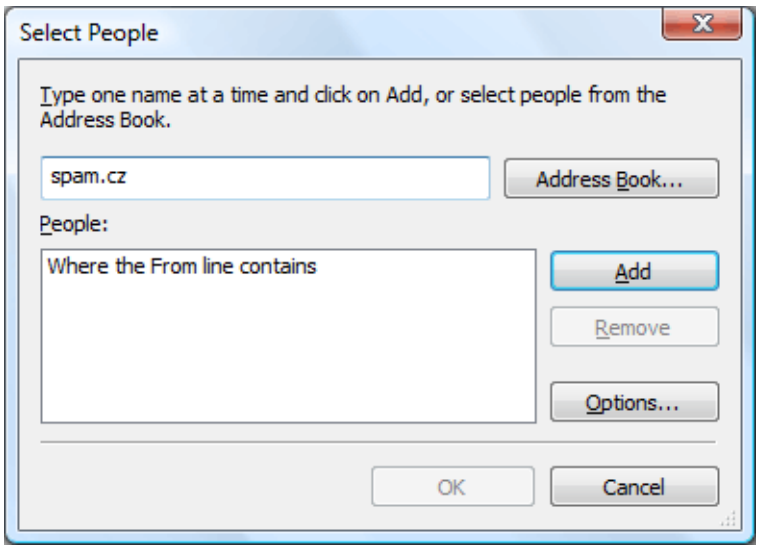


**Figure 5.14** Select People

Click on the *Options* button to open the *Rule Condition Options* dialog — see above.

**is**

The entry must exactly match with the specification.

**is not**

The entry must not match with the specification.

**contains**

The entry must contain the (sub)string.

**does not contain**

The entry must not contain the specified (sub)string.

**matches**
The entry must match the expression (the expression can contain the ? and * wildcards that can represent one or more characters).

**does not match**
The entry must not match the expression.

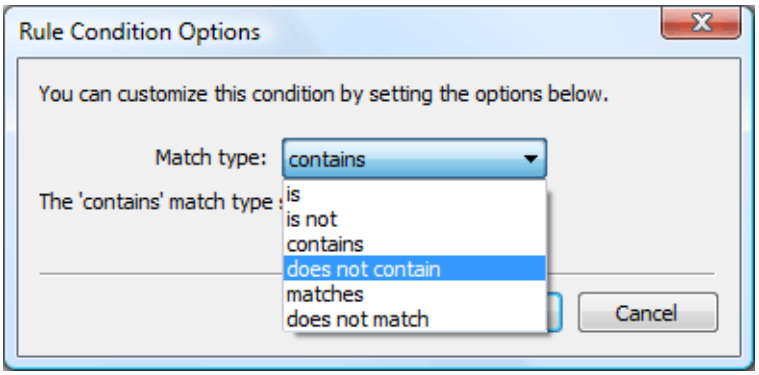


**Figure 5.15** Rule Condition Options

*Note:*
If more than one condition is defined, an appropriate logical operator must be used (*and* — both conditions must be met, *or* — at least one of the conditions must be met).

*Example:* You intend to create a rule that would drop all messages incoming from the *spam.com* domain which often sends unwanted messages (spam).

1. Select the *Where the line From contains* condition in the first dialog section.
2. Select the *Discard the message* option in the second section.
3. Select the *contains* option in the third section and specify the domain name (`spam.com`).
4. Enter a name for the rule (i.e. *Drop all messages from the spam.com domain*).

### 5.7.2 The Out Of Office rule

The *Out of office* rule allows sending of automated responses to all incoming messages. This rule is helpful when you go out of office for longer time (illness or vacations). This rule helps inform business partners and colleagues that their requests will be solved later, after you return to your office.

A special rule for automatic replies can be set on the *Kerio Connect* tab in *Tools* → *Options*. This rule can be used when a user is not available in the office for a certain time. Simply enable *Send automated reply that I'm out of office*, optionally set date and time, and add a comment that will be sent in the reply to delivered email.

***Warning:***
Before enabling the *Out of office* rule, it is recommended to enable also the *Spam* rule to make sure that automatic replies are not sent to spammers. If the *Spam* rule is not enabled, your address will be exposed to spammers who try to send their spam messages to randomly generated addresses and later use those addresses from which they get an answer (so that they are sure the address exists and start to send even larger volumes of spam messages to it).

*Note:*
The *I'm out of office* rule beats the rules for incoming messages. If the filter includes a rule which sends automatic replies, the action set in this rule will not be taken.

The *I'm out of office* rule consists of the following items:

- *Condition:* The rule will apply to all incoming messages except email sent from mailing lists. The automatic answer is not sent where answering to another automatic email (this should prevent users from email loops).
- *Action:* The text entered will be sent to each sender's address included in an incoming message once a seven days.

If the rule is enabled (i.e. the *I'm out of office* option is on), a question whether the automatic replies would be on or off is issued (see figure 5.16) upon each startup of *MS Outlook*. In this case it is supposed that once you run *MS Outlook*, you are not out of office any more and you are now able to reply to your email. This feature also ensures that you do not forget to turn the rule off once returned to the office.

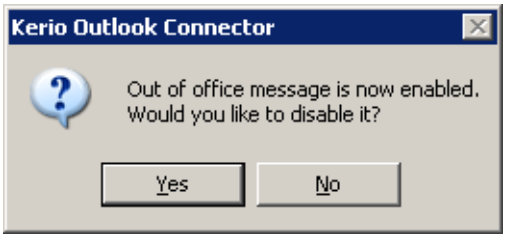


**Figure 5.16** Possible cancellation of the Out of office rule

### 5.7.3 Junk E-Mail rule

the *Spam* rule can be created either by the network administrator within network configuration or you can do it by yourself. As suggested by its name, the rule helps identify spam and moves recognized spam messages to the *Spam* folder automatically.

To configure the *Spam* rule, go to *Tools* → *Options*, tab *Kerio Connect*. This tab includes the *Spam* section where it is possible to enable the *Spam* rule and set other details concerning spam (see figure 5.17):

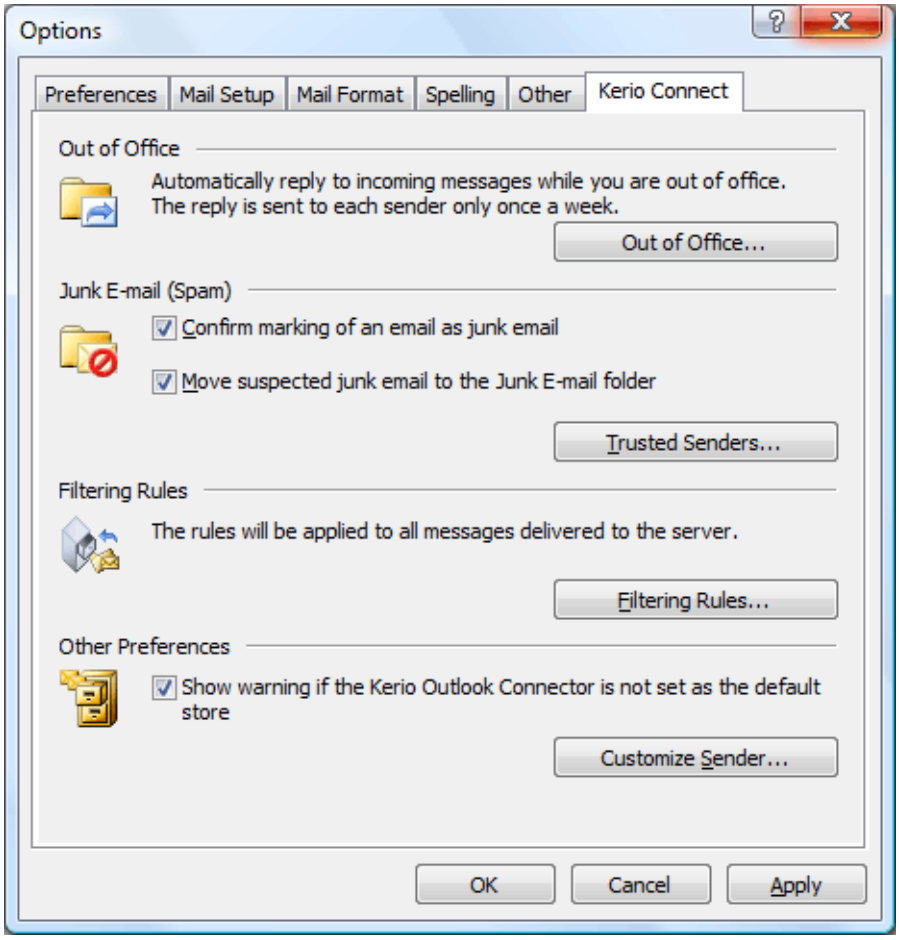


**Figure 5.17** The Junk E-mail tab

**Confirm marking messages as spam**

This option enables/disables alert window displayed upon clicking on the *Spam* button which is available in the toolbar.

**Move suspected junk e-mail to the Junk E-mail folder**

If this option is enabled, all email considered as spam will be delivered to the *Junk E-mail* folder automatically.

*Note:*

The *Move spam to the Junk E-mail folder* rule beats rules for incoming mail. If the filter includes any rule which in any way handles messages marked as spam, the action set in this rule is ignored.

This option also enables adding email addresses to the list of trustworthy users (see below).

### *Trusted Senders*

Addresses to which you send email will be added to the list automatically.

Addresses can be also added manually under *Tools* → *Options*, on the *Kerio Connect* tab (see figure 5.17). On this tab, click on *Trusted Senders*. This opens a dialog (see figure 5.18) where addresses can be defined:

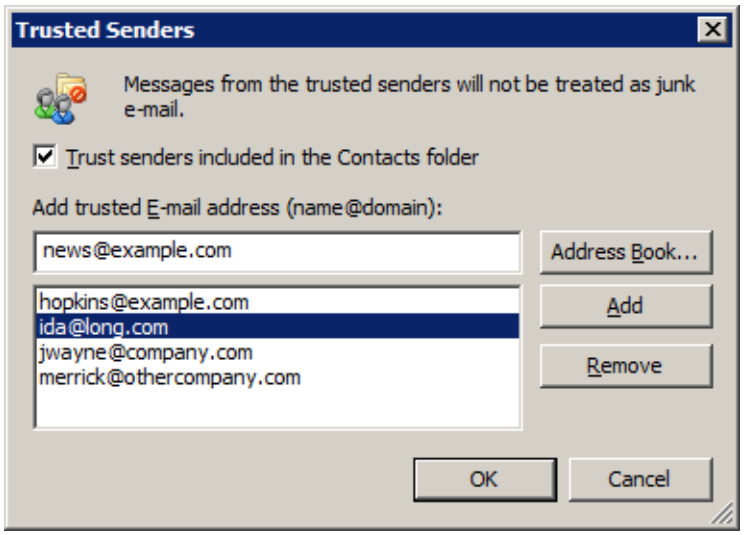


**Figure 5.18** Trusted Senders

**Add trusted E-mail address (name@domain)**
This address must be specified in the `username@domain` format.

**Trust senders included in the Contacts folder**
This option allows that messages from users belonging to the default contact folder are not tested against spam.
This option supposes that email addresses in one's contact list are trustworthy. If this option is enabled, it is not necessary to include addresses saved in the default Contact folder in the whitelist.

## 5.8 Spam filter

*Kerio Connect* contains the *SpamAssassin* antispam filter. *SpamAssassin* is based on content analysis (spam messages usually contain specific attributes that can be searched for and evaluated by the filter). Each message is assigned a numeric score; if this value exceeds the limit set in *Kerio Connect*, the message is marked as spam.

The spam filter may let some spam messages through from time to time by mistake (their score is low) and mark some regular messages as spam (their score is too high). For the reasons above, the antispam filter allows modification to the database used for recognition of spam messages. This method, however, requires user input. Users have to reassign the incorrectly evaluated messages to correct types (spam / non-spam) so that the filter learns to recognize them in the future.

*Kerio Outlook Connector* uses the *Spam* and *Not spam* buttons located in the toolbar to mark the messages correctly. Highlight the incorrectly marked message and click one of the buttons. The filter receives information regarding update of the database. This decreases chance for incorrect deliveries.

You can add the *Spam* and *Not spam* buttons to the toolbar in *Tools* → *Customize* menu or remove them. The *Toolbars* tab includes the *Kerio Outlook Connector* option. Simply select or unselect it by clicking to enable/disable the bar with the buttons.

The *Spam* button displays a warning message by default. To treat the message as spam and discard it, a confirmation is required. To enable/disable warning alerts, go to the *Tools* → *Options* menu on the *Kerio Connect* tab.

***Warning:***
If the *Spam/Not Spam* buttons are not available after installation or startup of *MS Outlook*, it is necessary to remove *Kerio Outlook Connector* from all forbidden items of *MS Outlook* (see chapter 6.13.1).

## 5.9 Folder Administration

Folders in *MS Outlook* with *Kerio Outlook Connector* are sorted in standard folder tree. This structure can include multiple roots (folders of the highest level). One root includes all personal folders, another includes public folders (for details on public folders, refer to section 5.9.2), other root folders can be added if any shared folders are subscribed. Details on shared folders are focused in section 5.9.1.

### 5.9.1 Folder Sharing

Folder sharing allows to make a folder with its contents available to another user. The only condition is that the user must have an account on the same mailserver. Any folder of the email account can be shared. Folder type is not important. This implies that it is possible to share email folders, calendars, task folders, notes, etc.

Folder sharing can be used for a wide range of purposes. Let us suggest a few examples. For example, you have an email folder where email orders are saved. This folder can be shared with your colleagues so that they can process the orders even when you are out of your office. You can also share the folder with your boss to make them see the current status of the orders. It is also possible to make a folder with jokes and share it with friends, etc.

#### *Sharing settings*

To share a folder, follow these instructions:

1. Right-click a folder and choose *Properties* from the pop-up menu.

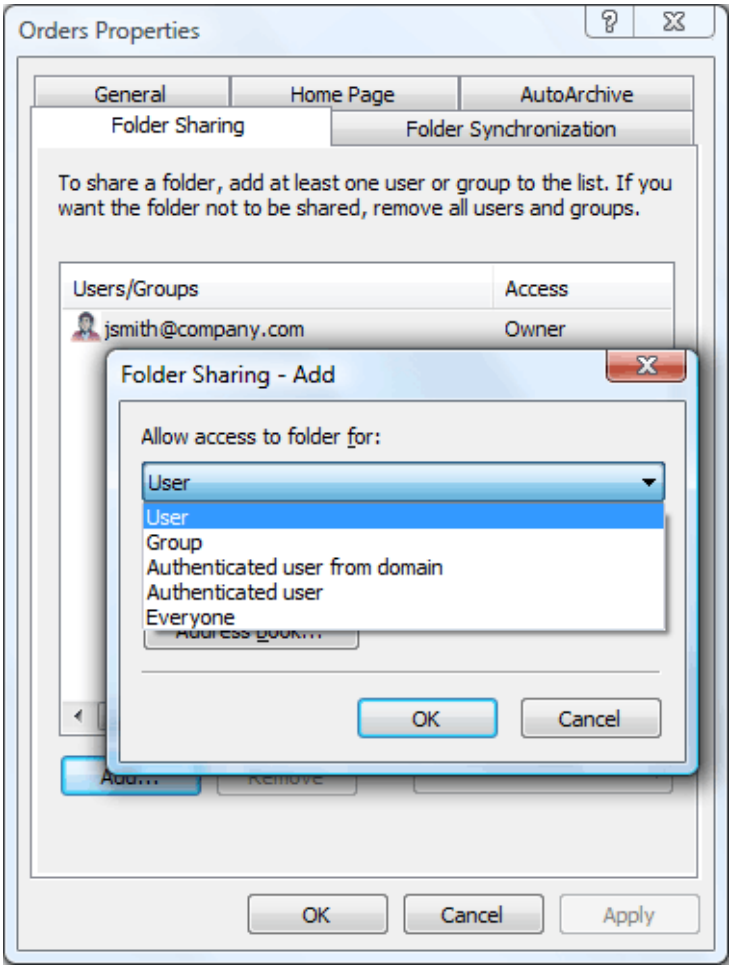


**Figure 5.19** Folder Sharing

2. In the properties dialog, select the *Folder Sharing* tab.
3. Click on *Add*.
4. This opens a menu where you can select with whom you will share the folder (see figure 5.19):
   - *User* — a particular user. Enter username (in case that the user belongs to the same domain as the sharer) or username with domain in the `username@domain` pattern (e.g. `jgraham@company.com`) if the user does not belong to the same domain.
   - *Group* — a particular group. Use the entry to specify name with the domain included in format `group@domain` (e.g. `sales@company.com`).
   - *Authenticated user from domain* — special type of access rights. The folder can be subscribed by all users who have an account in *Kerio Connect* in the same domain where this folder belongs. In the *Domain* field, insert the name of the corresponding domain.

- *Authenticated user* — special type of access rights. The folder can be subscribed by all users who have an account in *Kerio Connect*.
- *Everyone* — special type of access rights, also known as anonymous access. The folder can be subscribed by all users including those who have no account in *Kerio Connect*. This type of access rights is useful especially for publishing of calendars in the `iCalendar` format.

Now it is necessary to set level for access rights. This can be done through the menu available at the right-bottom corner of the dialog. We can select from the following options:

- *Administrator* — user with these rights can add or remove items in the folder and/or they can also remove the folder. They are also allowed to share the folder with other users. This administrator is not allowed to remove access rights for the user who created the group only.
- *Editor* — the user can edit items in the folder (add and remove items, etc.).
- *Reader* — the user is allowed only to read the folder's items. No editing is allowed.

The sharing can be also removed. To do this, simply check the corresponding line in the list and click on *Remove*.

### Login

Subscription of a folder adds the corresponding shared folder to the subscriber's mailbox (their folder tree). Subscription can be done as follows:

1. In *MS Outlook*, go to *Tools* → *Account Settings*.
2. Double-click on *Kerio Connect (KOC Offline Edition)* and in the account settings, select the *Other* tab.
3. Click on *Add* and in the *Attach Mailbox* dialog enter the user's username with domain in format `user_name@domain` (e.g. `jwayne@company.com`).

The subscribed folder is displayed in a separate root folder (the highest level folder). If you subscribe folders of 5 different users, their folders will be saved in 5 different roots. Each root is labeled with the name of the user who shared the folder(s) with us.

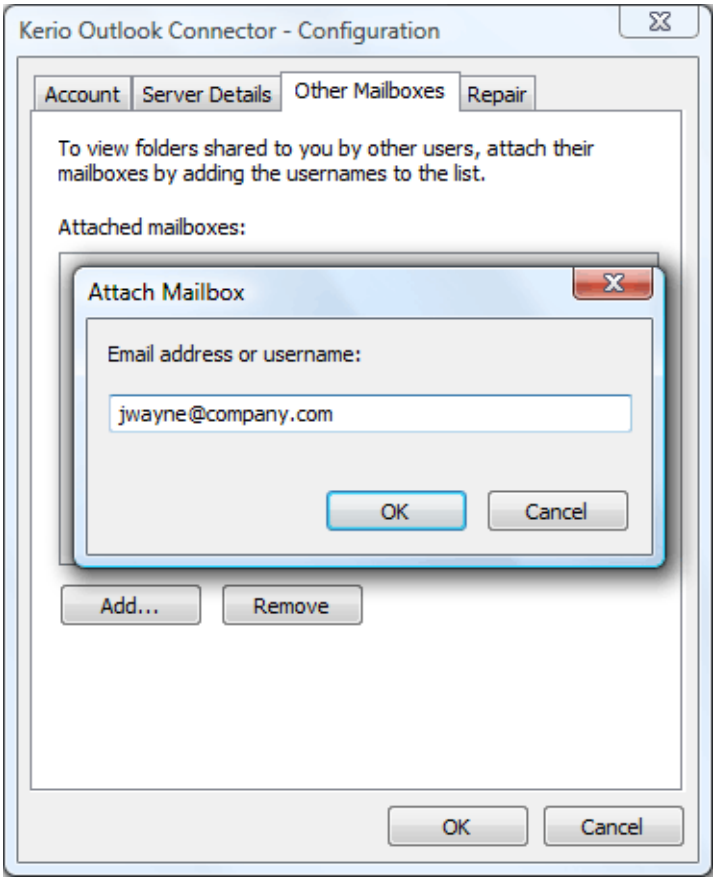


**Figure 5.20** Other mailboxes

### 5.9.2 Public folders

Public folders are special type of folders which are shared for reading to all users of the particular domain or of the particular mailserver (it depends on server settings). Public folders help especially share information across the company. For example, company's events are set in the public calendar so that everybody can see when the events happen and view their details, while the person who is responsible for setting of such events can see who is available for the corresponding event. Another advantage of this feature might be for example sharing of public contacts across the company.

## 5.10 Sender details settings

In *Kerio Outlook Connector* configuration, it is possible to set sender's parameters. This includes setting of display name, outgoing address and reply address. These settings can be defined in *Tools* → *Options* on the *Kerio Connect* tab, upon clicking on *Customize sender*. This opens the dialog where the sender's details can be set (see figure 5.21):

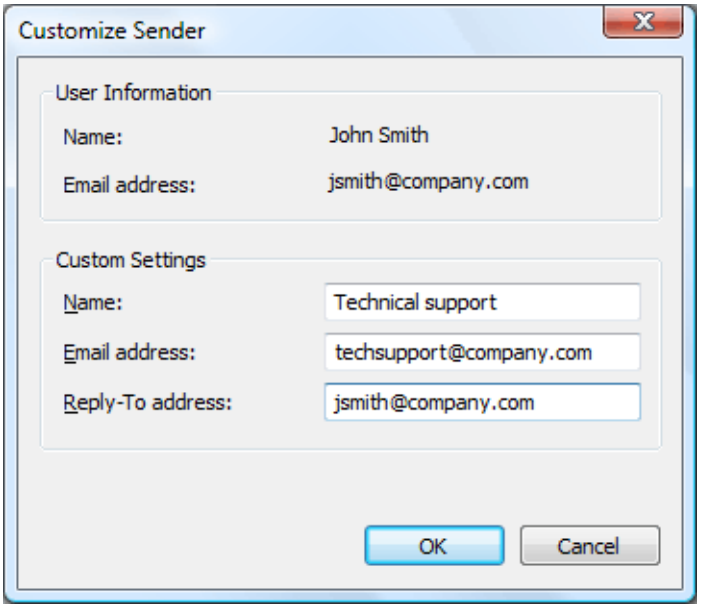


**Figure 5.21** Account settings — sender information settings

**Name**

The name that appears in sent email messages.

**Email Address**

The email address from which the messages are sent.

**Address for replies**

Address to which replies will be sent (the `Reply-To:` item). In the figure, the `jsmith@company.com` reply address is used. This address will be inserted in the *To* field as the reply address. Then, the reply will be sent to `jsmith@company.com`.

Chapter 6

# Kerio Outlook Connector

*Kerio Outlook Connector* is an extension to *MS Outlook*. It allows scheduling and sharing different types of data. Thanks to this module, *MS Outlook* is able to work with groupware data (contacts, calendar, tasks, notices) stored in *Kerio Connect*. The main benefit of the shared data store is that the data is available via the Internet anywhere necessary. To access the data, you'll need just an Internet connection and a web browser (the *Kerio WebMail* interface) or *MS Outlook* with *Kerio Outlook Connector* or *MS Entourage*.

*Kerio Outlook Connector* also includes *Help* which can be triggered from the *MS Outlook's* toolbar (*Help* → *Kerio Outlook Connector Help*).

*TIPS:*

- If you need to work with your email also in offline mode, it is recommended to use *Kerio Outlook Connector (Offline Edition)*, a special version of *Kerio Outlook Connector* described thoroughly in chapter 5.
- *Kerio Outlook Connector* provides support for digital signatures. The function and settings for digital signatures are described in standard *MS Outlook* help.

*Note:*
All settings relate to *MS Windows XP* and *MS Outlook 2003*. If you use *MS Outlook 2000* or *MS Outlook 2007*, the settings may differ (see chapter 6.13.2).

## 6.1 Software requirements

At Kerio Technologies website, you can find:

- versions of operating systems supported by the *Kerio Outlook Connector* installation,
- supported versions of *MS Outlook*.

## 6.2 Installation

Installation of the *Kerio Outlook Connector* for *Kerio Connect* is performed by the installation wizard. Once the *Kerio Outlook Connector* installation is completed, it is necessary to set a profile and an email account manually.

***Warning:***

1. First, it is necessary that *MS Outlook* has been installed and at least once started on the computer. Then you can install the *Kerio Outlook Connector*. otherwise the application will not function properly.

2. When the upgrade or downgrade of *MS Outlook* is performed, *Kerio Outlook Connector* must be reinstalled manually.

### 6.2.1 Creating a new profile and Kerio account settings

The user profile is a file where personal information in *MS Outlook* is stored. Profiles are applied especially under the following conditions. either the computer is accessed by multiple users and each of them needs his/her own email address and personal settings or a user can access multiple mailboxes and wants to use different personal settings for each of them. Settings for a new profile can be configured in the *Start* → *Settings* → *Control Panel* → *Mail* menu:

1. In the just opened *Mail Setup — Outlook* dialog, click on *Show Profiles* (see figure 6.1).

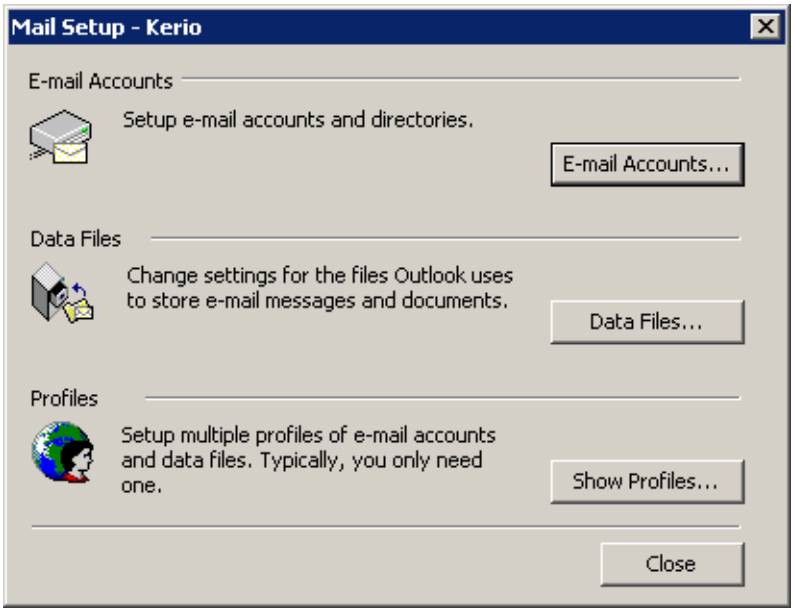


**Figure 6.1** Profile setup

2. The *Mail* dialog is opened (see figure 6.2) where profiles and user accounts may be administered.

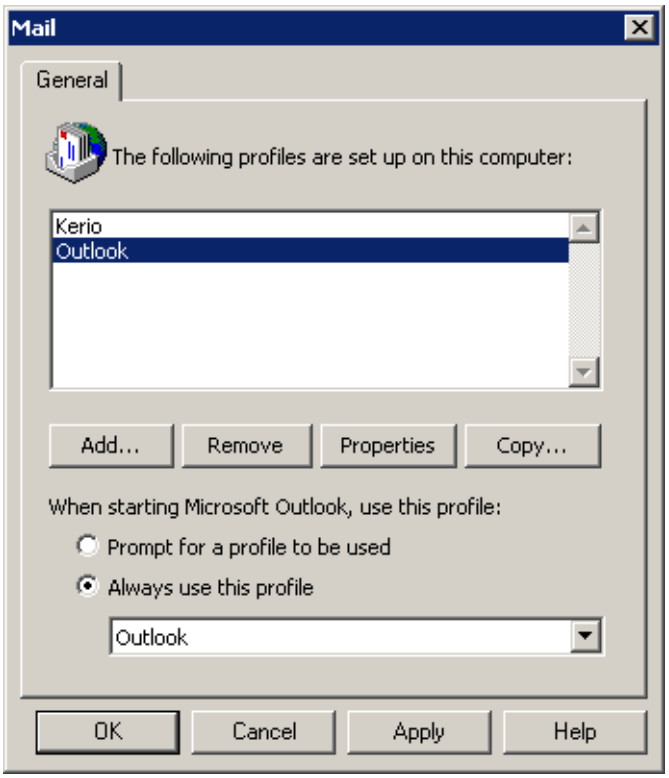


**Figure 6.2** Creation of a profile

3. Click on *Add*. A dialog box is opened with a blank entry for specification of the new profile's name. You can enter any profile name you wish. Then, confirm settings by clicking on *OK*.

4. The new profile is empty (i.e. no email account is created in it). Therefore, the wizard where a new account can be created is started automatically once a new profile is created.

5. On the first page of the wizard, check *Manually configure server settings or additional server types* and click on *Next*.

6. The next step allows selection of a server type. Select *Other* → *Kerio Connect* (see figure 6.3) .

7. In the next step, a window with three tabs allowing configuration of the *Kerio Outlook Connector* is opened (see figure 6.4):

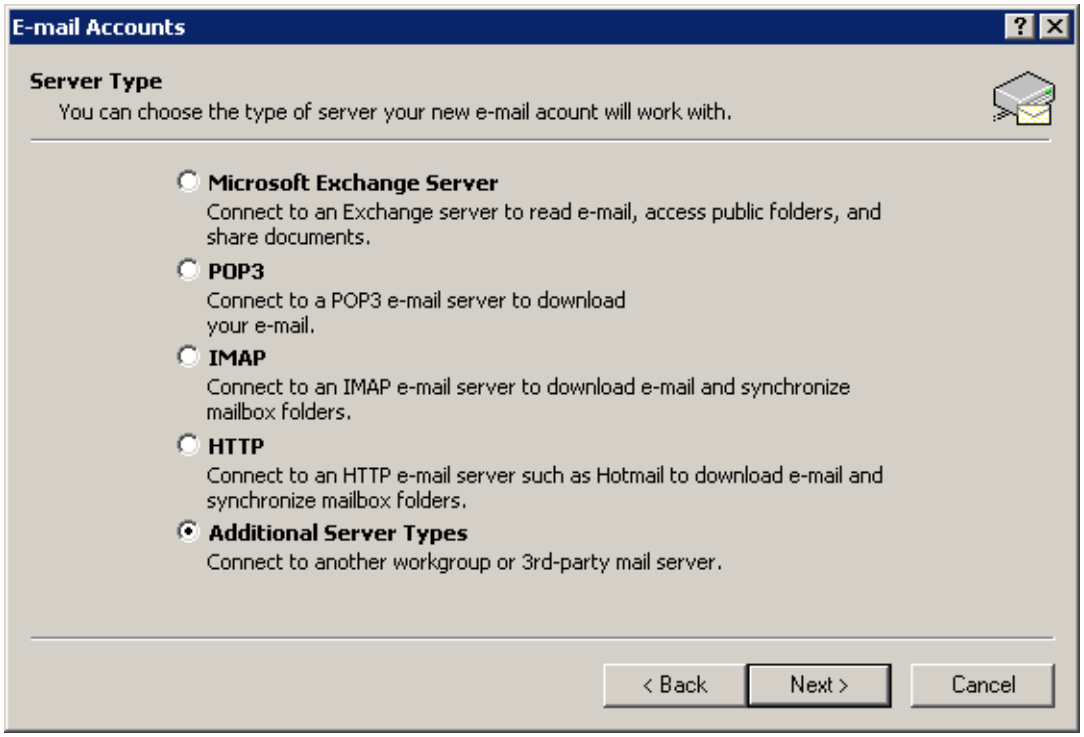


**Figure 6.3** Account settings — server type selection

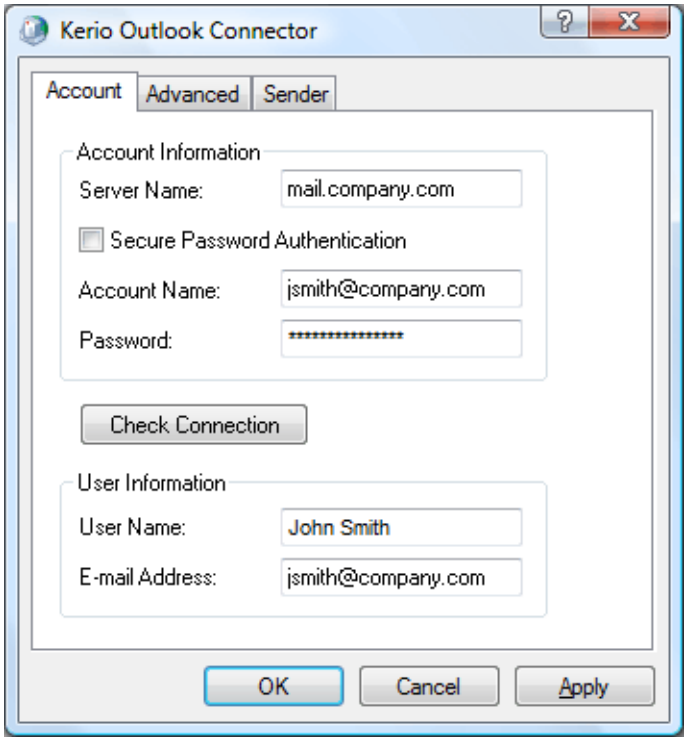


**Figure 6.4** Account settings — connection settings

### Server Name

DNS name or IP address of the mailserver.

### Secure Password Authentication

This option allows using the NTLM authentication. When checked, users are not required to set usernames and passwords — the authentication will be used instead. In order for the NTLM authentication to be functional, both the computer as well as the user account have to be parts of the domain used for authentication.

> ***Warning:***
> NTLM (SPA) can be used only if *Kerio Connect* is installed on *Windows* operating systems.

### Username

Username used for logging to the mailserver. If the user does not belong to the primary domain, a complete email address is required (`jwayne@company.com`).

### Password

User password.

Press the *Check connection* button to test if correct user data has been specified and if the connection to *Kerio Connect* works properly. If the test is finished successfully, a corresponding *User Name* and *Email Address* are automatically filled in.

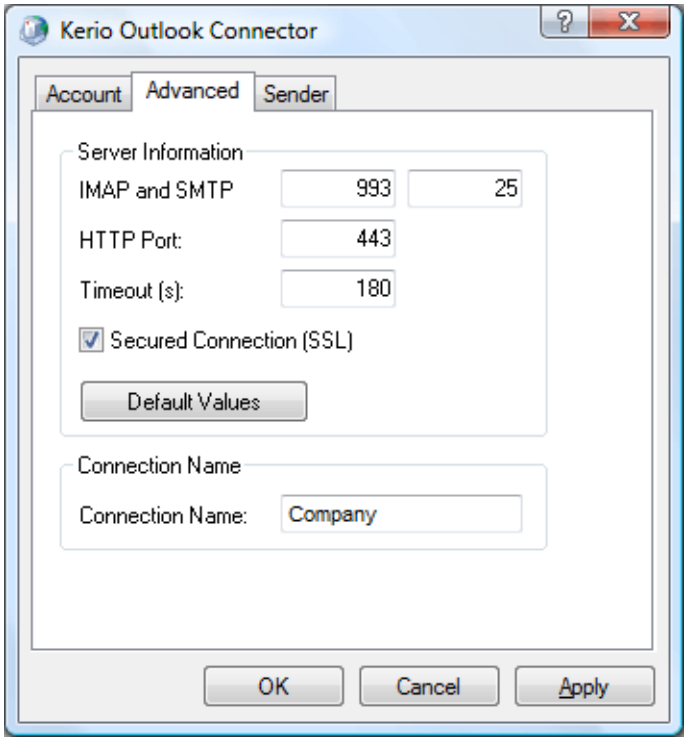


**Figure 6.5** Account settings — ports

Use the <emphasis>Advanced Settings</emphasis> tab to change some of the communication settings.

**IMAP and SMTP port**

Port used for communication with the server by IMAP and SMTP protocols. The port numbers must be the same as the port numbers set in *Kerio Connect*.

**HTTP port**

The HTTP(S) protocol uses the *Free/Busy* calendar and applications for automatic updates of *Kerio Outlook Connector*. Port number must be identical with the port number for the HTTP(S) service used by *Kerio Connect*.

If you want to use SSL-secured HTTP protocol, it is necessary to install a trustworthy certificate on the client station (details on its installation are provided in chapter 6.9.1).

**Timeout**

Time spent by the application waiting for a response from *Kerio Connect*.

**Secured Connection (SSL)**

This option enables the SSL-encrypted communication using IMAP, SMTP and HTTP.

> ***Warning:***
> The settings of this option apply generally to all protocols. It is not possible to enable encryption for separate ones.

The *Default Values* button changes all settings to their default values.

**Connection name**

*Kerio Outlook Connector Store* is used by default. This name can be changed.

The *Sender* tab includes an option to configure displaying of name, outgoing address and reply-to address.

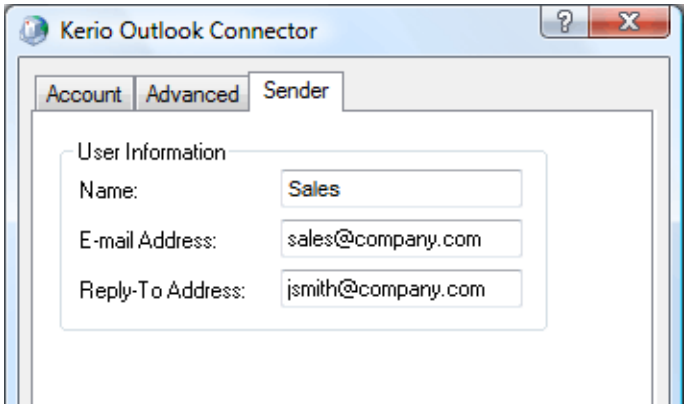


**Figure 6.6** Account settings — sender information settings

**Name**
The name that appears in sent email messages.

**Email Address**
The email address from which the messages are sent.

**Address for replies**
Address to which replies will be sent (the `Reply-To:` item).
*Note:*
If Outlook 2000 is used, changes performed on the *Sender* tab will take effect after a restart of the application.

8. Click *OK* to confirm and save the settings and to close the wizard. The profile created can be found in the list provided on the *Mail* page. Now, two options of profile modes are available (see figure 6.2):

   - *Always use this profile* — this option sets the new profile as default. Then, the profile including the new account is opened automatically upon each startup of *MS Outlook*.

   - *Prompt for aprofile to be used* — if this option is used, a menu is opened providing a list of all profiles (see figure 6.7). Upon each startup of *MS Outlook*, one of these profiles can be selected.

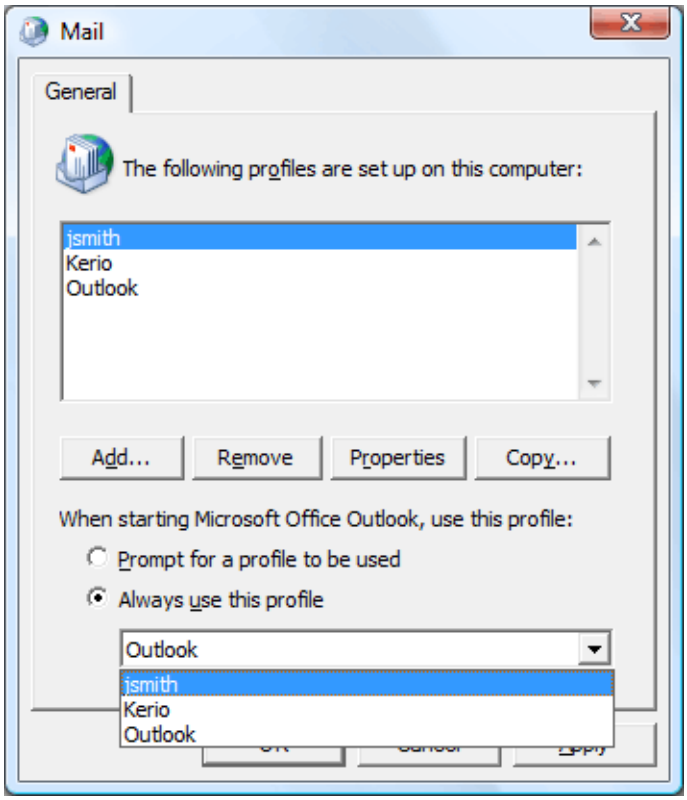


**Figure 6.7** Choose Profile

***Warning:***
Each *MS Outlook* profile may be used only by one account connected via *Kerio Outlook Connector*. Functionality of POP3 and IMAP accounts located in the same profile is not affected by *Kerio Outlook Connector Store*.

*Note:*
If you use *MS Outlook 2000*, make sure that you add *Kerio Connect* and *Outlook Address Book* items during configuration. In higher versions of *MS Outlook*, *Outlook Address Book* is added automatically.

### 6.2.2 Data file settings

For *Kerio Outlook Connector* to work properly, it is necessary to set the *Kerio* file as the default data file. If the file has not been selected automatically before, it can be specified in the *Tools* → *Email Accounts* → *View or Change Existing Email Accounts* menu. The *Email Accounts* window contains the *Deliver new email to the following location* option, where *Kerio* can be selected.

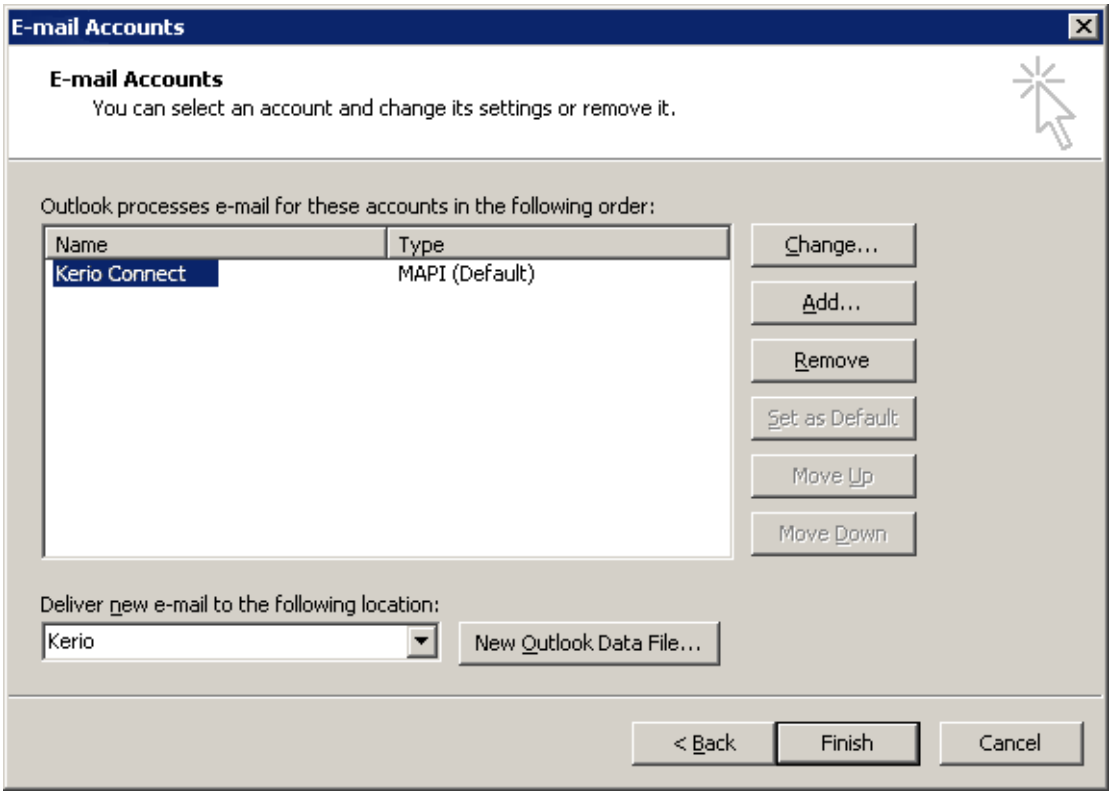


**Figure 6.8** Data file settings

*Kerio Outlook Connector* can also check whether the *Kerio* is selected as a default message store. By default, the check is enabled and if the *Kerio* is not selected as a default store when *MS Outlook* is started, a warning is displayed.

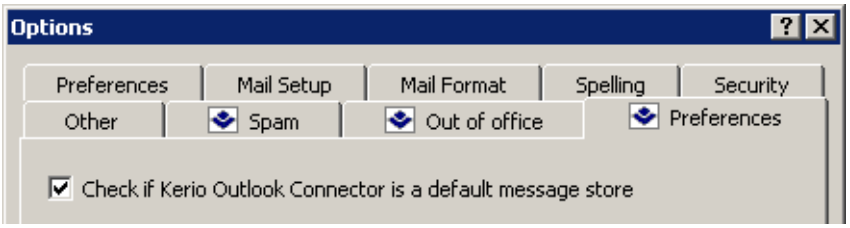


**Figure 6.9** The store checking option

This option can be enabled/disabled in the *Tools* → *Options* → *Preferences* menu (see figure 6.9).

## 6.3 Upgrade of the Kerio Outlook Connector

Upgrades of *Kerio Outlook Connector* are performed automatically. If a new version of *Kerio Outlook Connector* is available, the module is updated immediately upon the startup of *MS Outlook*.

> ***Warning:***
> When the update is completed, *MS Outlook* is restarted automatically.

The update process and the restart takes up to two minutes.

The automatic update includes check of versions of *Kerio Connect* and the *Kerio Outlook Connector*. If versions of the server and the client do not match, the user is informed that a different version of *Kerio Connect* is installed on the server and that the client should be updated (see figure 6.10). Upon confirmation by the YES button, the version is upgraded/updated immediately (or downgraded).

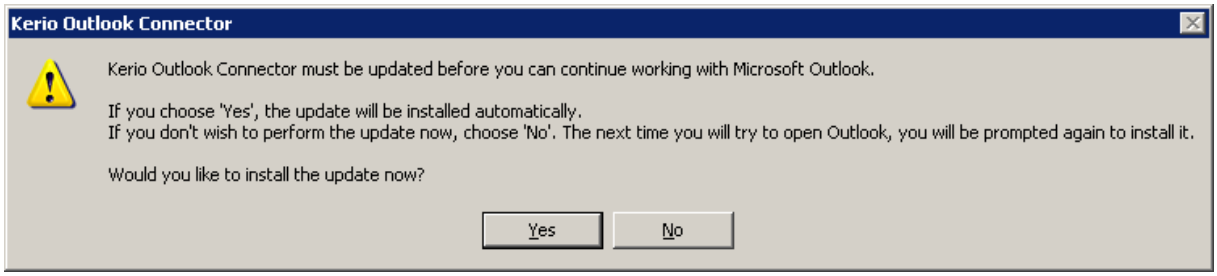


**Figure 6.10** Version collision notification

*Note:*
If the server and client differ only in their build numbers (numbers in the notification are the same), the client will work even if the update is rejected. If, however, version numbers are different (for example `6.4.0` versus `6.4.1`), *Kerio Outlook Connector* cannot be started unless updated.

## 6.4 Changing of user password

Network administrator can change user passwords to email account on the particular server. In such a case, it is necessary to change the particular password also in *MS Outlook*.

The password can be changed directly in the account settings (click *Tools* → *Email accounts* → *View / change the email accounts*).

The password can be also changed in the *Login* dialog that is displayed in case the *Outlook* application fails to log in with the existing login and password (see figure 6.11).

**Figure 6.11** Login dialog

The dialog contains the following items:

**Server**
DNS name or IP address of the computer that the user is logging to.

**Username**
Username including domain.

**Password**
A textbox for the new password.

The change once committed is also applied to the account settings.

*Note:*
The settings described relate to cases where password is changed by the network administrator. Users can change their passwords in *Kerio WebMail* (detailed information on how to change password can be found in chapter 1.13.3).

## 6.5 Shared and public folders

### 6.5.1 Sharing and mapping of folders

*Kerio Connect* enables creating of shared folders and their mapping. A shared folder is any folder of any user who has decided to share it with other users (or groups of users) and grant specific rights to them. In this case, mapping is subscription of shared folders by users with appropriate rights.

Here is an example for better understanding of the issue:

There are two invoice clerks in a company. Both accept orders by email, so they use special email folders for these orders. If any of them goes for vacations or has to stay at home for any reasons, the other one needs to access her order folders.

The clerks both need rights to access the work folders of each other. This can be enabled by sharing of the folders. They simply select folders to share and set access rights for the other user (the other clerk).

If the user rights are set correctly, we can start the mapping. Mapping is always performed by the user with whom the particular folder was shared. The user simply opens a corresponding dialog in *MS Outlook* where she specifies her name. The shared folder then appears in the user's folder tree.

It only depends on the access rights assigned to the folder. Mapped folders can be available:

- for reading only,
- for reading and writing,
- for administration purposes.

#### *Folder Sharing*

In *MS Outlook* with the *Kerio Outlook Connector*, folders can be shared in *Properties* dialog window of the particular folder. To open the *Properties* window, right-click on a corresponding folder. This opens the context menu, where the *Properties* option is included. In the dialog, use the *Sharing and Security* tab to set sharing preferences.

The *Sharing and Security* tab allows users to share a particular folder with other users and set their user rights.

The *Add* button opens a window where a user or a group of users for sharing can be added. To select a user from the address book, click the *Address Book* button.

Click *Remove* to remove an individual user or a group of users and disable sharing.

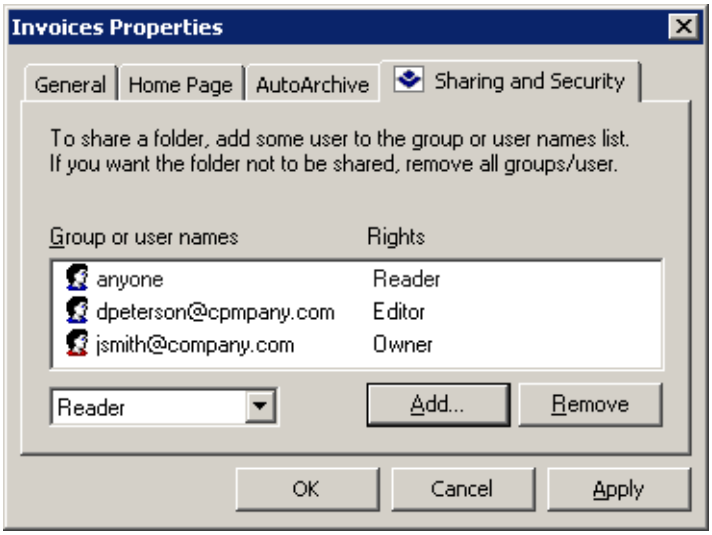


**Figure 6.12** Folder Sharing

Permissions for a specific user can be set in the menu under the user list:

- *Admin* — users with this level of rights can share a specific folder with other users. and remove items in the group or the group itself. This user is not allowed only to remove access rights for the user who created the group.
- *Editor* — the user can edit items in the folder (add and remove items, etc.).
- *Reader* — the user is allowed only to read the folder's items. No editing is allowed.

When setting the access rights, the special *anyone* or *authuser* user accounts can be used. This way, the access rights can be granted to all (or logged) users.

### Shared folder mapping

Folder mapping is used for connecting the shared folders of other users. Use the *Options* dialog of the root folder to map the selected folder (right-click the *Kerio* root folder and select *Properties for Kerio*.

Use the *Folder mapping* tab to connect shared folders of a selected user. In the *Mapping name* textbox, the email address of the folder's owner is specified as `~owner@company.com`. If one or more folders are shared by the owner, these folders will be displayed in the *Folder* menu. To confirm the connection, click the *Add* button next to the list of folders. If the folder was connected properly, it appears in the list of mapped folders in lower part of the window. From here, the folders can be removed using the *Remove* button.

Public folders are mapped to all users automatically.

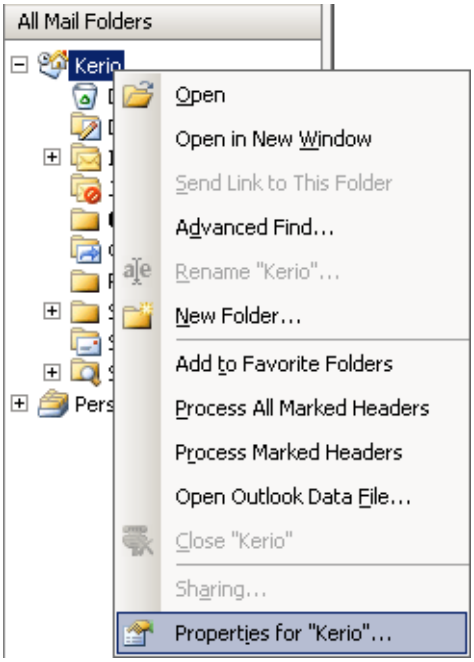


**Figure 6.13** Context menu of the root folder

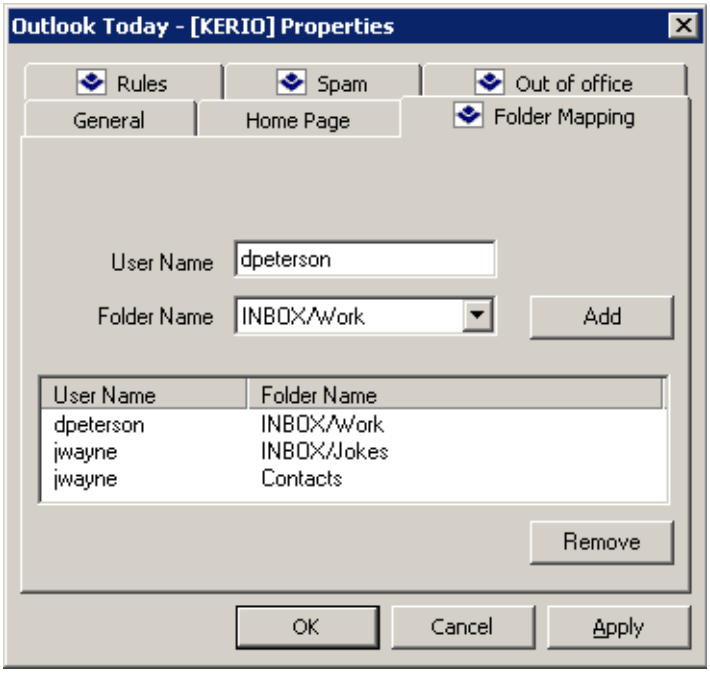


**Figure 6.14** Folder mapping

### 6.5.2 Public folders

Public folders are special folders shared by all users belonging to the particular email domain or even all users with an account in the *Kerio Connect*. By default, the folders are in read only mode. If desirable, administrator of public folders can assign higher access rights.

Public folders are useful especially for sharing of contacts or information in the company's public calendar.

## 6.6 Rules for incoming messages

Rules for sorting and filtering mail at the server can be defined using *Kerio Outlook Connector* (the same rules that can be defined in the *Kerio WebMail* interface ).

***Warning:***
After installation of the *Kerio Outlook Connector*, it will not be possible to use the standard *MS Outlook's* dialog for administration of rules for incoming mail and alerts Rules and alerts (under *Tools* → *Rules and alerts*).

Use the special dialog in the root folder options to create rules for incoming messages (right-click the *Kerio* root's *Kerio Properties* folder).

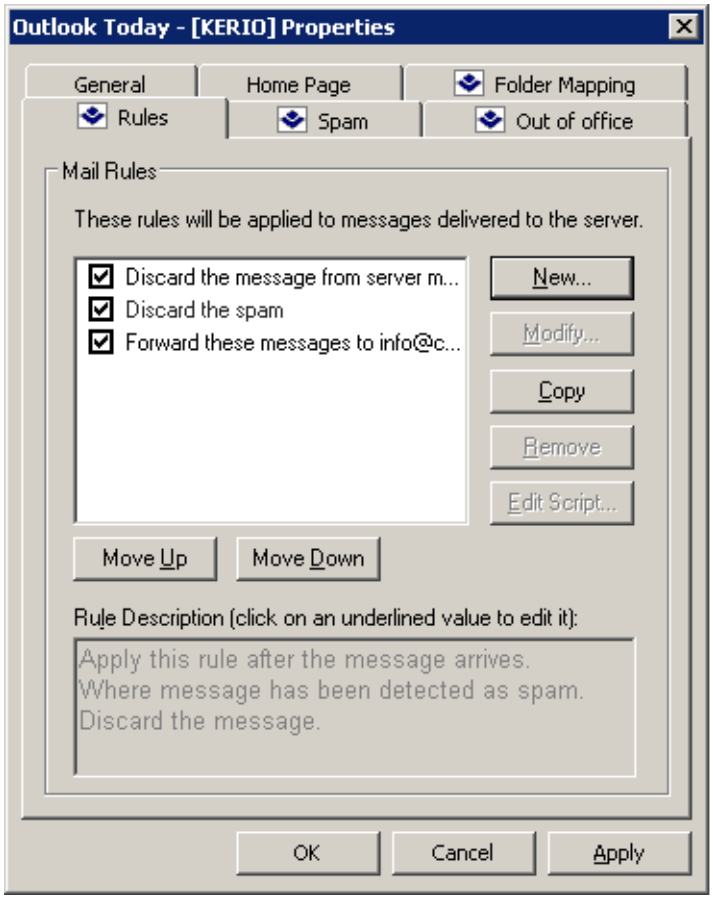


**Figure 6.15** Rules for incoming messages

Root folder options include several tabs. Open the *Rules* (see figure 6.15). The tab includes rules defined. You can enable or disable rules using appropriate matching fields. Mark any rule to view detailed information about this rule in the *Rule description* window.

Rules are tested from the top downwards. You can use the *Up* and *Down* buttons to move rules within the list.

The following buttons and functions are available:

- *New* — creates a new rule (see below).
- *Modify* — edits selected rule (see below).
- *Copy* — copies an existing rule. This rule must be renamed. This function can be useful when you intend to create a new rule that differs only in a few parameters from the selected rule.
- *Remove* — removes the selected rule.
- *Edit* — edits the rule source using the *Sieve* code (encoding used for sorting rules descriptions). We recommend you not to use this function unless you are experienced in the *Sieve* code.

The *Rules* tab may include two predefined rules which cannot be edited as described below. These rules are the *Spam* and *Out of office* rules.

The *Spam* rule moves any messages recognized by the server as spam to the *Spam* folder. If this rule is existing, it was created by the *Kerio Connect* administrator while creating the user account. To set this rule, go to the *Tools* → *Options* → *Spam* menu. To learn more on this rule and related spam topics, refer to chapter 5.7.3.

The *Out of office* rule provides automatic answers to email messages where the recipients are absent to do it by themselves. This rule can be set in *Tools* → *Options* → *Out of office*. For details on this topic, see chapter 6.6.2.

### 6.6.1 Creating or changing a rule

Use the *New* or the *Modify* button to open the *Rule Editor* dialog which includes the following sections:

1. *Select the conditions for your rule* — conditions that must be kept so as the email administration meets this rule. One or more conditions from this list can be selected:

   **Where the recipient (To or Cc) line contains address**
   The To or the Cc (Copy To) entry includes defined string.

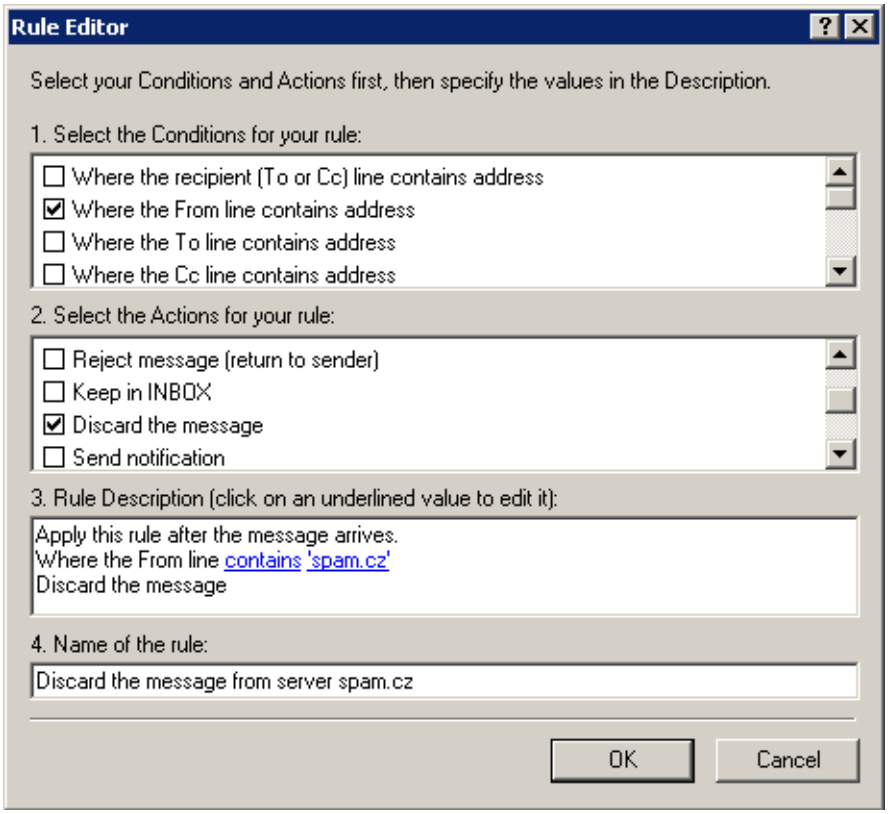


**Figure 6.16** Rule Editor

**Where the From line contains address**
The `From` entry contains the string.

**Where the To line contains address**
The `To` entry contains the string.

**Where the Cc line contains address**
The `Cc` (Copy To) entry contains the string.

**Where the Sender line contains address**
The `Sender` entry includes the string. This entry is often contained in messages sent automatically (mailing lists, etc.) where it stands for the `From` entry.

**Where the Subject contains specific words**
The `Subject` entry contains defined string(s).
*Kerio Connect* spam filter can be set so that the Subject entry will include results of antispam tests (the value is represented by asterisks). Using this feature spam may be filtered easily. Simply insert the number of asterisks that will specify the rule. Messages that match this rule will accept this specification.

**Where the message has an attachment**
At least one attachment must be appended to the message.

**Where the message size is more/less than size**
The message size exceeds the specified value. To specify the size you can select from the following units: bytes (*B*), kilobytes (*KB*) and megabytes (*MB*).

**Where the message was detected as a spam**
Spam are undesirable messages sent to users. You can use the *Kerio Connect* antispam filter to protect your users from such messages. This filter uses special header items which include message evaluation and information about applied antispam testing.

**For all messages**
This rule is valid for all incoming messages.

2. *Select the Actions for your rule* — select an action that will be taken for messages matching with condition in section *1*

**Move the message to a specified folder**
Move the message to the selected folder (you can choose a folder from a list). You can also specify shared or public folders in one of the following forms: `~user/shared_folder` or `#public/public_folder` if the appropriate user has write rights for this folder.

> ***Warning:***
> If a folder is renamed that a rule is created for, name of the folder in the rule is not changed. Therefore, it is necessary to do this manually.

**Forward the message to an address**
Forward to a specified address. In this case no other actions are performed.

**Reject message (return to sender)**
The message will not be stored in a local mailbox and the user will never be informed about it.

**Keep in Inbox**
This action must be combined with another (i.e. with *Move*, *Forward*, *Reject*, etc.). It cannot be combined with the *Discard the message* action.

**Discard the message**
The message will not be stored in any local folder. This action cannot be combined with the *Keep in INBOX* action (these two actions are contradictory).

**Send notification**
Sends notification (i.e. a short text message) to a specified address, typically to a cellular phone. It is necessary to define even cellular phones by email addresses, for example john.bluemonday@t-mobile.com.
The following macros can be used in the message text:

- `$from$` — the notification will show the message sender or the address contained in the *From* field.
- `$from-name$` — the notification will show the name of the message sender.

- `$subject$` — the notification will show the message subject.
- `$text$` — the notification will show the message text. Only the first 128 characters will be displayed. To reduce the number of displayed characters, edit the macro as follows: `$text[50]$` (the number in brackets represents the maximum number of characters displayed in the notification).

**Send autoreply**

The automatic reply with a specified text. The automatic reply will be sent to each sender's address only once a week (so that the automatic reply does not create a loop in case there is an automatic reply set at the other end).

**Stop processing more rules**

If the message complies with this rule, no more rules will be processed. Using this function a user can create more complex rule systems for individual condition types. Rules are tested rule by rule from the top downwards.

*Note:*
Notifications and autoreplies are protected from loops. This means that the system does not send a notification in reply to received notification or automatic replies. The detection of notification or automatic replies is performed using special items in the message header. Only notifications and automatic replies generated by *Kerio Connect* are detected.

3. *Rule description* — description of the rule function (it is generated automatically according to the rule definition). Highlighted entries are interactive — click them to set other parameters.

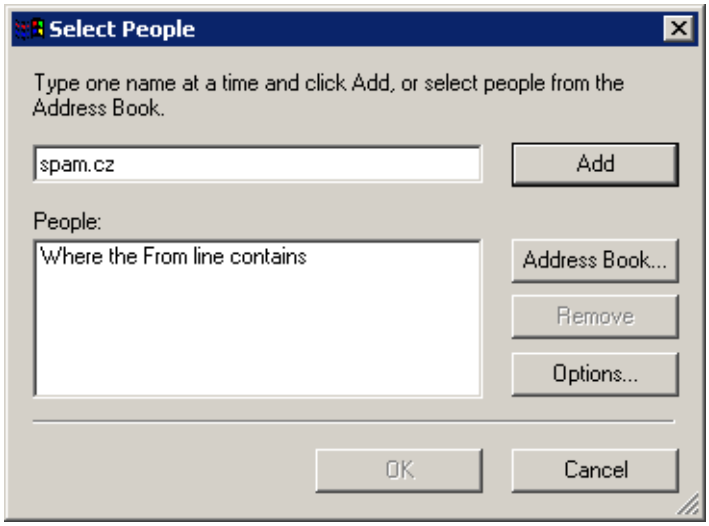


**Figure 6.17** Select People

Click on the *Options* button to open the *Rule Condition Options* dialog — see above.

**is**
The entry must exactly match with the specification.

**is not**
The entry must not match with the specification.

**contains**
The entry must contain the (sub)string.

**does not contain**
The entry must not contain the specified (sub)string.

**matches**
The entry must match the expression (the expression can contain the ? and * wildcards that can represent one or more characters).

**does not match**
The entry must not match the expression.

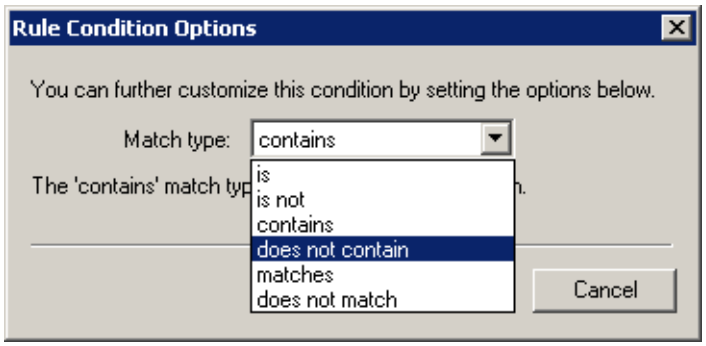


**Figure 6.18** Rule Condition Options

*Note:*
If more than one condition is defined, an appropriate logical operator must be used (*and* — both conditions must be met, *or* — at least one of the conditions must be met).

*Example:* You intend to create a rule that would drop all messages incoming from the *spam.com* domain which often sends unwanted messages (spam).

1. Select the *Where the line From contains* condition in the first dialog section.
2. Select the *Discard the message* option in the second section.
3. Select the *contains* option in the third section and specify the domain name (`spam.com`).
4. Enter a name for the rule (i.e. *Drop all messages from the spam.com domain*).

### 6.6.2 Out of office

A special rule for automatic replies can be set on the *Out Of Office* tab in *Tools* → *Options*. This rule can be used when a user is not available in the office for a certain time. Enable the rule and specify the message that will be used as an automatic reply.

***Warning:***
Before enabling the *Out of office* rule, it is recommended to enable also the *Spam* rule to make sure that automatic replies are not sent to spammers. If the *Spam* rule is not enabled, your address will be exposed to spammers who try to send their spam messages to randomly generated addresses and later use those addresses from which they get an answer (so that they are sure the address exists and start to send even larger volumes of spam messages to it).

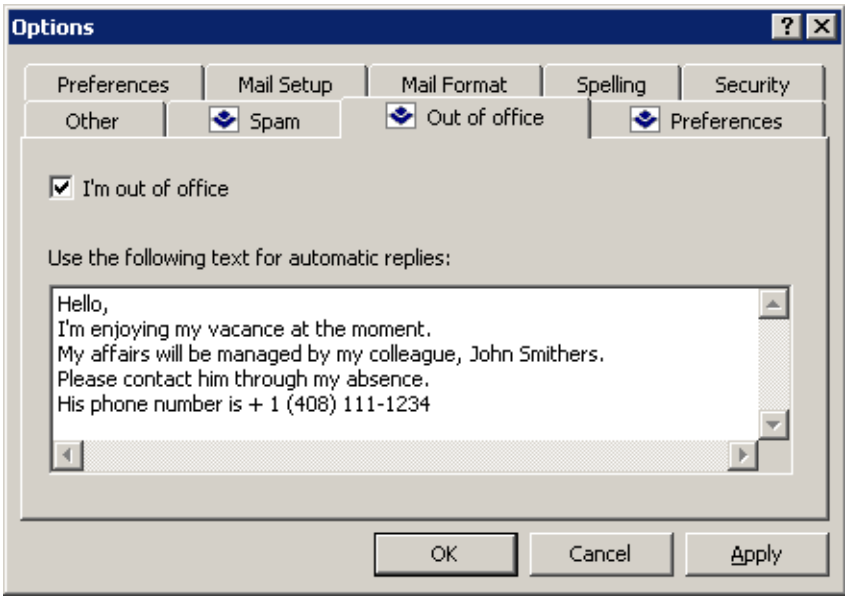


**Figure 6.19** The Out of office tab

*Note:*
The *I'm out of office* rule beats the rules for incoming messages (see chapter 6.6.1). If the filter includes a rule which sends automatic replies, the action set in this rule will not be taken.

The *I'm out of office* rule consists of the following items:

- *Condition:* The rule will apply to all incoming messages except email sent from mailing lists. The automatic answer is not sent where answering to another automatic email (this should prevent users from email loops).
- *Action:* The text entered will be sent to each sender's address included in an incoming message once a seven days.

If the rule is enabled (i.e. the *I'm out of office* option is on), a question whether the automatic replies would be on or off is issued (see figure 6.20) upon each startup of *MS Outlook*. In this case it is supposed that once you run *MS Outlook*, you are not out of office any more and you are now able to reply to your email. This feature also ensures that you do not forget to turn the rule off once returned to the office.

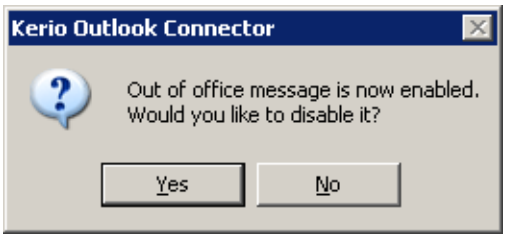


**Figure 6.20** Possible cancellation of the Out of office rule

## 6.7 Spam filter

*Kerio Connect* contains the *SpamAssassin* antispam filter. *SpamAssassin* is based on content analysis (spam messages usually contain specific attributes that can be searched for and evaluated by the filter). Each message is assigned a numeric score; if this value exceeds the limit set in *Kerio Connect*, the message is marked as spam.

The spam filter may let some spam messages through from time to time by mistake (their score is low) and mark some regular messages as spam (their score is too high). For the reasons above, the antispam filter allows modification to the database used for recognition of spam messages. This method, however, requires user input. Users have to reassign the incorrectly evaluated messages to correct types (spam / non-spam) so that the filter learns to recognize them in the future.

*Kerio Outlook Connector* uses the *Spam* and *Not spam* buttons located in the toolbar to mark the messages correctly. Highlight the incorrectly marked message and click one of the buttons. The filter receives information regarding update of the database. This decreases chance for incorrect deliveries.

You can add the *Spam* and *Not spam* buttons to the toolbar in *Tools* → *Customize* menu or remove them. The *Toolbars* tab includes the *Kerio Outlook Connector* option. Simply select or unselect it by clicking to enable/disable the bar with the buttons.

The *Spam* button displays a warning message by default. To treat the message as spam and discard it, a confirmation is required. Use the *Tools* → *Options* menu on the *Spam* tab (see figure 6.21) to enable/disable displaying of the warning message.

***Warning:***
If the *Spam/Not Spam* buttons are not available after installation or startup of *MS Outlook*, it is necessary to remove *Kerio Outlook Connector* from all forbidden items of *MS Outlook* (see chapter 6.13.1).

### 6.7.1 The Spam tab

The *Spam* tab provides several tools to fight spam:

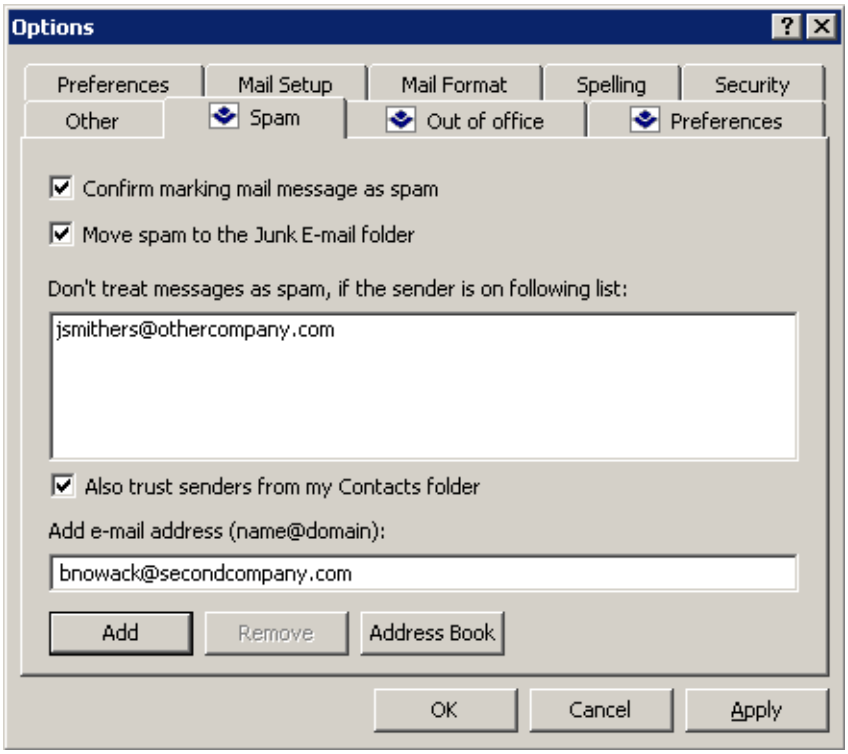


**Figure 6.21** The Junk E-mail tab

**Confirm marking mail message as spam**

This option enables/disables alert window displayed upon clicking on the *Spam* button which is available in the toolbar.

**Move spam to the Junk E-mail folder**

If this option is enabled, all email considered as spam will be delivered to the *Junk E-mail* folder automatically.

*Note:*

The *Move spam to the Junk E-mail folder* rule beats rules for incoming mail (see chapter 6.6). If the filter includes any rule which in any way handles messages marked as spam, the action set in this rule is ignored.

This option also enables adding email addresses to the list of trustworthy users (see below).

**Also trust senders from ...**

So called *Spam whitelist* In this list, senders that will automatically be considered as non-spammers can be added/removed.

A new email address can be added in the *Add e-mail address* entry. This address must be specified in the `username@domain` format.

**Also trust senders from my Contacts folder**

If this option is enabled, messages marked as spam which were sent from addresses included in the default contact folder are not moved to the *Spam* folder automatically. This option supposes that email addresses in one's contact list are trustworthy. If this option is enabled, it is not necessary to include addresses saved in the default Contact folder in the whitelist.

## 6.8 Address books and contacts

### 6.8.1 Searching in address books via the MAPI interface

*MS Outlook* extended by the *Kerio Outlook Connector* enables searching through the *MS Outlook Address Book* via the MAPI interface. *Outlook Address Book* is a special folder allowing search email addresses where addresses are filled in automatically. Addresses are filled in automatically for example when an address is being specified during a new mail composition. Simply enter initial characters of the first or second name string to the *To:*, *Cc:* or *Bcc:* entries to make the client search for matching items and fill the address in automatically. If multiple email addresses matching the string are found, a menu is opened where you can select from the options.

To avoid misunderstandings, the following terms must be explained:

- *Outlook Address Book* — a special folder where *MS Outlook* looks up email addresses (e.g. when addresses are filled in automatically or where email addresses are searched by first or second names).

  Unlike a contact folder, the address book does not include additional information to first and second names and the corresponding email address. Address books are simple lists of possible recipients of email, meetings and delegated tasks.

- Contacts — the folder including user contacts. These folders can be private, public or it is possible to subscribe a shared folder. Each contact item includes first name, second name and additional info such as address, phone numbers, email addresses, dates of birth, etc. Address books do not include this information.

In *MS Outlook*, any contact folder can be added as a directory to *Outlook Address Books*. All contact items included in the subscribed contact folders will then be searched through when the function of automatic completion of email addresses is applied.

Once a contact folder is added, full names and an email addresses of all contacts included in the particular folder are added to the address book. Other information associated with contacts are not transferred to address books. It is not possible to search in contacts for example by date of birth or department.

***Warning:***
The search criteria is first and second names in contacts (the *Full name* item). It is not possible to search by usernames or email addresses.

Connection of a folder as a directory does not influence the contact folder. The data is not changed or moved. Each contact folder can be used as before — it is possible to add, remove and contacts, etc. The only effect is that whenever a new contact is added, its first name and surname and email address will be added also to the address book.

By default, searches are performed in the *Outlook Address Book* directory. The *Outlook Address Books* administration can be found in the *Tools* → *E-mail accounts* → *View or change existing directories or address books* menu (see figure 6.22).

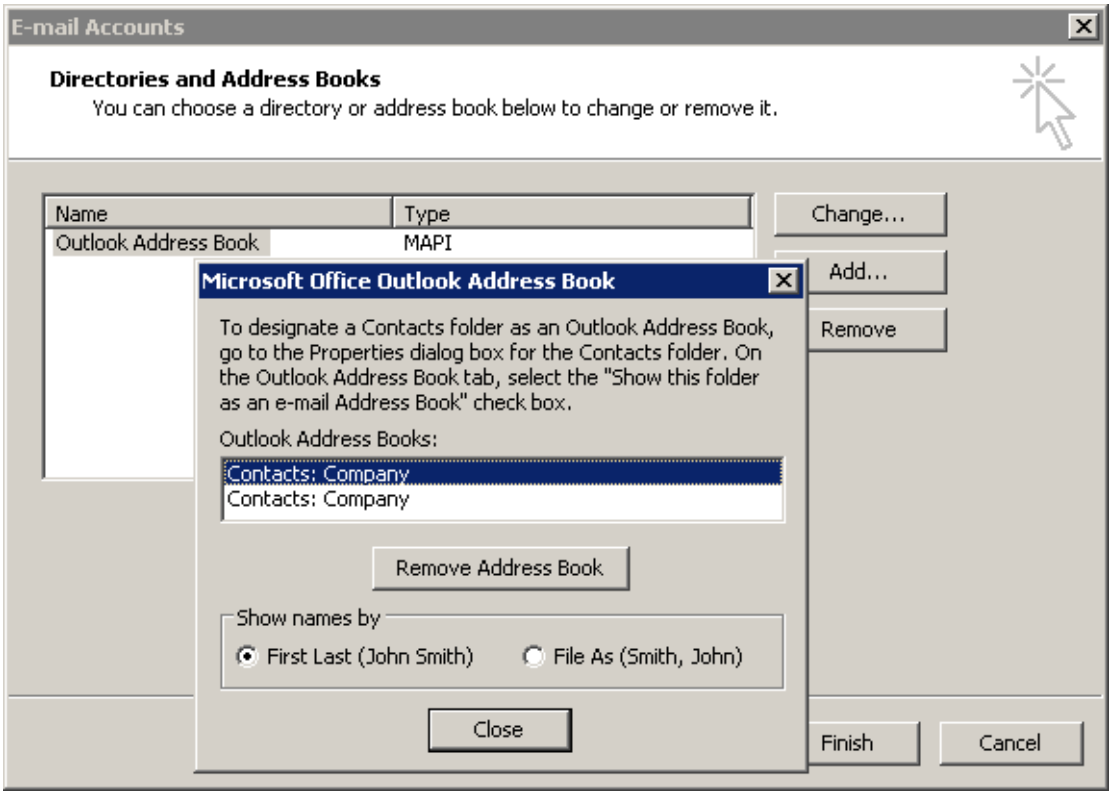


**Figure 6.22** Directory management

It is possible to add to the *MS Outlook Address Book* any folders with contacts where lookup should be performed.

The following settings must be done for addition of a contact folder as a directory:

1. Right-click on the contact folder.

2. In the context menu, select *Properties...*

3. This opens a dialog where the contact folder properties can be edited. Open the *Outlook Address Book* tab (see figure 6.23).

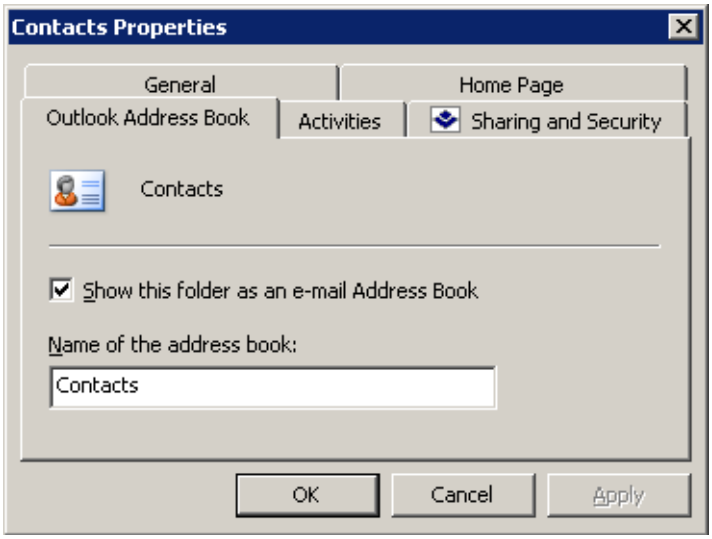


**Figure 6.23** Show this folder as an e-mail Address Book

4. Enable the *Show this folder as an e-mail Address Book* option.

5. Click OK to confirm settings.

## 6.9 Appointments

In *MS Outlook*, a special tool can be used for scheduling of meetings (details on what meetings are and how they are used, see section 1.8.7). This tool is called *Free/Busy* server. *MS Outlook* extended by *Kerio Outlook Connector* allows using of the *Kerio Connect's* built-in *Free/Busy* server.

The *Free/Busy* server helps the meeting initiator schedule their events for times when invited attendees are free (the meeting does not collide with any other event in their calendars). It is, therefore, easier to find a time range where all attendees required to participate in the meetings are free. This feature help us avoid many phone calls and emails that we would otherwise make or send.

*Free/Busy* server exploits information on user's free time from the calendar of the particular user. However, the meeting initiator can only see when the attendee is free or busy. It is not possible to view particular details on the user's activities.

*Free/Busy* information is displayed in the event's edit window on the *Scheduling* tab in the section addressing meetings. *Free/Busy* is enabled automatically when attendees are entered in the list. To the right from the list, you can find the *Free/Busy* calendar (see figure 6.24).

The *Free/Busy* feature also provides information on how much busy the user is. Degree of user's busyness is suggested by the color. The color key is shown at the bottom of the window.

***Warning:***
*Free/Busy* information is displayed only for attendees with an account in the *Kerio Connect* (usually, this function is used to set meetings with colleagues). Such an information is not displayed for external users.

The *Free/Busy* calendar displays all meetings and events included in the default calendar folder and its subfolders. If you want that some events (e.g. items of a private calendar) are not shown in the *Free/Busy* calendar, create a new calendar folder out of the branch of the default calendar and its subfolders.

### 6.9.1 Creating a meeting using the Free/Busy server

Meetings are created in a similar way as events:

1. Open a new event dialog to enter subject and site where the event (meeting) will take place.
2. Switch to the *Scheduling* tab
3. and enter individual participants of the meeting (see figure 6.24). Once participants are added, their free/busy calendar items relevant for the particular time set for the meeting is displayed. Level of user busy-ness is shown by the blue color (unfortunately, *MS Outlook* does not support viewing of busy-ness level). The users with no data on the free/busy server (users with no account, users that do not use the calendar) are marked with grey.

***Warning:***
It is necessary to specify each user by their usernames and domains (`username@domain`). Aliases cannot be used to display *Free/Busy* information.

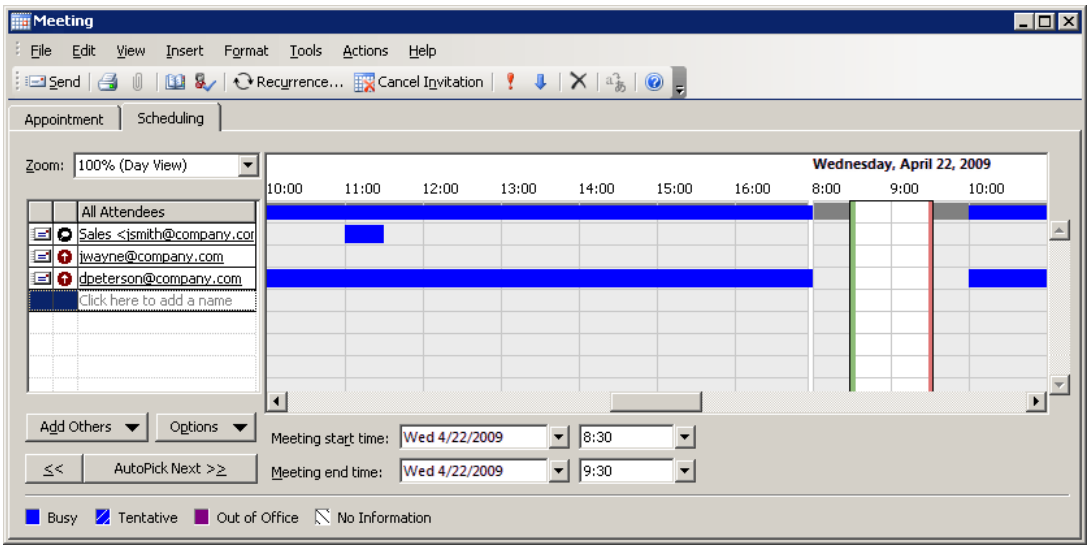


**Figure 6.24** Usage of the Free/Busy calendar

The slide window in the schedule shows the time of the suggested meeting marked by a green and a red vertical lines where the time range starts and ends. The window can be moved, extended or narrowed by the mouse pointer.

> ***Warning:***
> For successful authentication to *Free/Busy* server, specify the *Subject* item in the *Appointment* tab.

### *Free/Busy server's security*

Traffic between the *Free/Busy* server and *MS Outlook* can be secured by SSL encryption. This requires SSL encryption to be enabled in the account settings and the *Kerio Connect's* SSL certificate to be installed. For this purpose, you can use either a certificate issued by a trustworthy certification authority or a so-called self-signed certificate which can be generated in *Kerio Connect* (for details on certificates as well as their creation and authorization, refer to Kerio Connect 7, Administrator's Guide).

#### Enabling SSL traffic in account settings

In email account settings (under *Tools* → *E-mail Accounts* → *View or change existing e-mail accounts*) on the *Advanced* tab, enable the *Secured connection (SSL)* option.

> ***Warning:***
> This setting applies to any traffic performed between the account and *Kerio Connect*. All traffic is encrypted if the *Secured connection (SSL)* option is enabled.

#### Enabling SSL traffic in account settings

In account settings (under *Tools* → *Account Settings*) on the *E-mail* tab, click on the *Kerio Connect (KOC Offline Edition)* account and in the account settings on the *Server Details* enable *Use secured connection (SSL)*.

#### Installation of the certificate in Internet Explorer

1. Run *Internet Explorer* and specify the corresponding URL to login to *Kerio WebMail*. SSL-secured protocol must be used for the connection to the server. This implies that the URL should start with `https://` (example: `https://mail.company.com/`).
2. A window reporting the certificate issue is opened. Click on *Continue to this website (not recommended)* to open the *Kerio Connect Administration/WebMail* login page.
   To avoid future certificate issues, it is necessary to install the certificate. Click on the *Certificate Error* → *View Certificate* option next to the welcome page URL. Use the *Install Certificate* button to start the installation wizard. When finished, the certificate gets installed.
3. In the dialog with certificate details displayed, click on the *Install certificate* button.
4. A certificate installation wizard is opened. There is nothing to be set in the wizard. Simply confirm all settings and close the wizard to install the certificate.

The other option is to download the certificate from page *Integration with Windows/Mac/Linux*. A link to this page can be found on the *Kerio Connect WebMail* login page. Click on *Download SSL certificate* to save or install the certificate on your computer.

## 6.10 Resources

*Kerio Connect* now provides an electronic management of resources shared by employees of your company. Resources are rooms and devices available in the company, such as OHPs, whiteboards, cars, etc. Resource management allows to:

- book a resource for a particular time,
- view current resources and their reservations in the Free/Busy calendar (for details on Free/Busy calendars and information on appointments, see section 6.9) when planning reservations,
- subscribe resource calendars by using standard sharing/delegation,
- set the resource manager who can decide on priorities in case of any collisions in reservations.

Resources can be booked by using the existing calendar system. Resource reservation is based on creating of en event. The feature works similarly as appointment scheduling. The main difference is that the *Attendees* tab must include the resource selected from the contact list (it can naturally also include contacts of attendees). In the *Free/Busy* calendar you can see whether the resource is available for the scheduled time or not.

*Note:*
To make a resource available for booking, it is necessary to create it in *Kerio Connect* first. If you need to create a new resource, contact your network administrator.

### *Resource scheduling*

*Note:*
The settings described are provided for *MS Outlook 2007*. If you use another version, settings may differ slightly.

To book a resource, follow these instructions:

1. Open a new event and specify its subject.
2. Click on the *Scheduling* button in the new event's toolbar (see figure 6.25).
3. Add the resources email address to the list of attendees (e.g. `car1@company.com`). If you do not know the address of the resource, you can find it in the public contact folder called *Resources* (click on *Add Others Add from Address Book* under *Resources* → *Public Folders*).

*Note:*
If the folder is missing in the list, it is necessary to add it for search. Just follow these guidelines: In *MS Outlook*, go to section *Contacts*, right-click on *Resources* and select *Properties*. On the *Outlook Address Book* tab, check the *Show this folder as an e-mail Address Book* option (see figure 6.23).

4. If the Free/Busy calendar is working, information about the source is shown in the right section of the dialog. It is therefore easy to check right away, whether the source is free or already booked by another user for the suggested time (see figure 6.25).

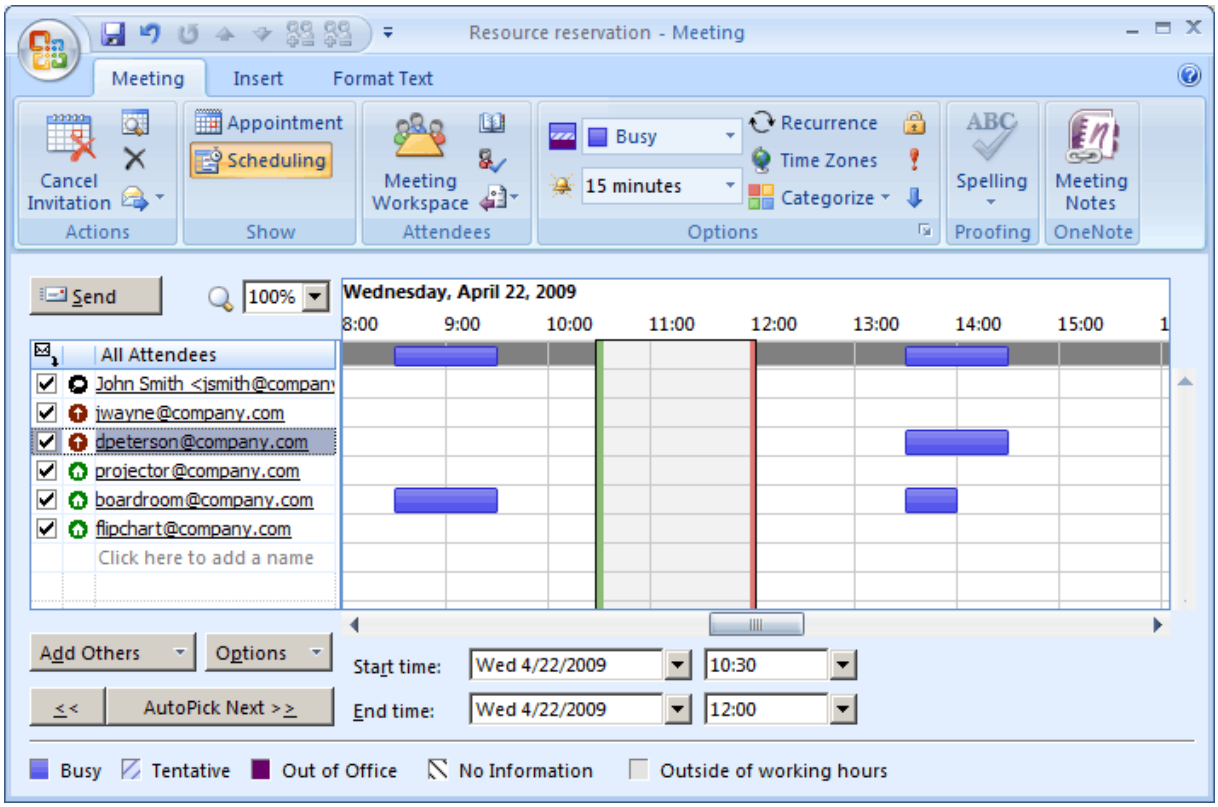


**Figure 6.25** Resource reservation

You may have noticed that there are also other attendees in the list shown in figure 6.25. Resources can be reserved either for usual appointment or for meetings (see section 1.8.7).

### *Resource calendar*

Each resource created in the system has its own calendar where all reservations are displayed. Calendars of individual resources can be subscribed through the standard sharing process (subscription of shared folders is focused in chapter 6.5.1).

Most user can access resource calendars in the read-only mode. Resource calendars can be edited only by the resource manager. The role of resource managers and their rights are addressed in the following section.

### *Reservation management*

In certain situations, it is necessary that a resource is booked even if it has already been reserved or that there is no other way than to make the reservation by a phone call. For such purposes, there exists a user with special rights who is a manager of the company resources. Resource managers can access resource calendars with administration rights. This implies that they can edit, remove or move reservations in the particular resource calendar. They can also create new reservations.

If you are a resource manager, first it is necessary to subscribe calendars of all resources that you would manage:

1. Right-click on the *Kerio Outlook Connector Store* root folder and select the *Properties for Kerio Outlook Connector Store* option from the context menu.

2. In the dialog just opened, go to the *Folder Mapping* tab.

3. In the *User Name* field, enter name of the resource. If the resource is not created in the primary domain, insert its full name including the domain (e.g. `car1@company.com`) and click on *Add* (see figure 6.26). This adds the resource to the list of subscribed folders.

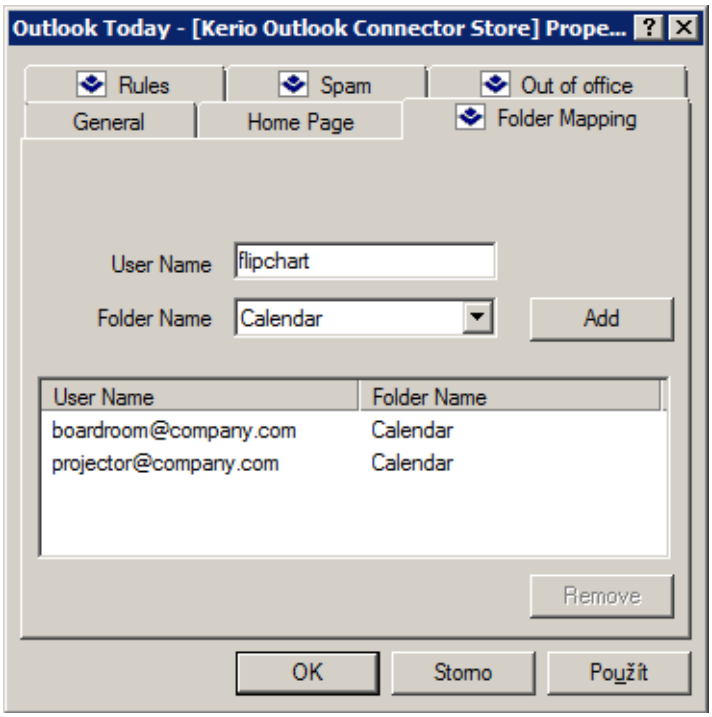


**Figure 6.26** Context pop-up menu of the root folder

4. If you are a manager of multiple resources, subscribe all calendars as described in steps 1 to 4.

Once subscribed, calendars of individual resources are shown in the folder tree. Each resource calendar now shows all reservations of the particular item done by any users. The resource manager can edit reservation time, add new reservations or remove them if demanded.

## 6.11 Private items

Private events, contacts and tasks are useful especially for sharing of folders. If a user shares a calendar or a contact folder for another user(s), items set as private can be opened and edited only by the folder's owner.

Private contacts and tasks in subscribed folders are not displayed. In case of private events, only time for which the event is set is displayed. The `Private event` string is displayed as subject. Such events cannot be opened or edited.

Private items can be created as follows:

1. Open a dialog box where a new event, contact or task can be created.
2. Insert relevant information.
3. On the first tab, enable *Private*.
4. Save changes by clicking *Save and Close*.

*Note:*
In the *Free/Busy* calendar, private events are displayed in the same way as others.

Private events are different from private contacts and tasks:

- *Private events*

  To enable their display in the calendar, they must be downloaded from the server to the particular email client. This behavior might slightly endanger security.

  Private events are treated as private only if the client where the private event folder is viewed supports this feature. In other client applications, it is possible to view and edit any events without any restrictions by users with appropriate access rights. This also implies that private events are not well secured.

- *Private contacts and tasks*

  Private contacts and tasks are kept in a folder on the server. This implies that if a user shares a folder with another user, private contacts and tasks are not available to this user. The client application can download only such contacts and tasks which are not marked as private.

## 6.12 Notes

*Kerio Connect* supports note folders. This implies that note folders are stores on the server and you can access them also via *Kerio WebMail*.

These folders work the same as the other supported folder types:

- note folders are stored on the server in the folder tree,
- public note folders can be created,
- note folders can be shared with other users and it is also possible to set access rights for other users.

To learn what note folders are used for as well as how to handle them, refer to *MS Outlook* user guides.

## 6.13 Troubleshooting

### 6.13.1 Spam/Not Spam buttons displaying problems

Sometimes it may happen that the *Spam/Not Spam* buttons may be missing on the toolbar when the *Kerio Outlook Connector* or *MS Outlook* is started. In such a case, it is necessary to allow *Kerio Outlook Connector* in forbidden items of *MS Outlook*.

### 6.13.2 Installation and configuration of MS Outlook 2000

The installation of *Kerio Outlook Connector* in *Outlook 2000* is different from the installation in previous versions:

1. *Outlook 2000* must have Service Pack 3 installed; if the Service Pack is missing, the installation of *Kerio Outlook Connector* will fail.

   *Outlook 2000* must be installed in the *Corporate or Workgroup* mode. If the installation of *Outlook 2000* is performed in the *Internet only* mode, change the mode in *Tools* → *Options* → *Email services* → *Reconfigure email support* (the installation disc of *Outlook 2000* might be required).

2. Another difference applies to the new profile creation. For more information about profiles and their creation in *MS Outlook*, see chapter 6.2.1.

   After a successful installation of *Kerio Outlook Connector*, create a new profile. This can be done in the following ways:

   - Creating of multiple profiles by a migration (performed by the system administrator).
   - Creating a profile by hand.

If a migration tool is used for profile creation, click *Tools* → *Services* and add the *Outlook Address Book* item to the profile. If the *Outlook Address Book* will not be added to the profile, contacts folders will not work properly.

If a profile is created by hand, it is possible to follow the method described in chapter 6.2.1. The only difference is that it is necessary to add the *Kerio Connect* and *Outlook Address Book* services during creation. Both services can be added to the profile later in *Tools* → *Services* menu.

### 6.13.3 Messages signed in MS Outlook

If your messages are digitally signed, in *MS Outlook 2003* check the *Send clear text signed message when sending signed messages* option under *Tools* → *Options* on the *Security* tab (see figure 6.27). For *MS Outlook 2007*, the option can be found under *Tools* → *Trust Center* → *E-mail Security*. This option provides that also *Kerio WebMail* users may read the message.

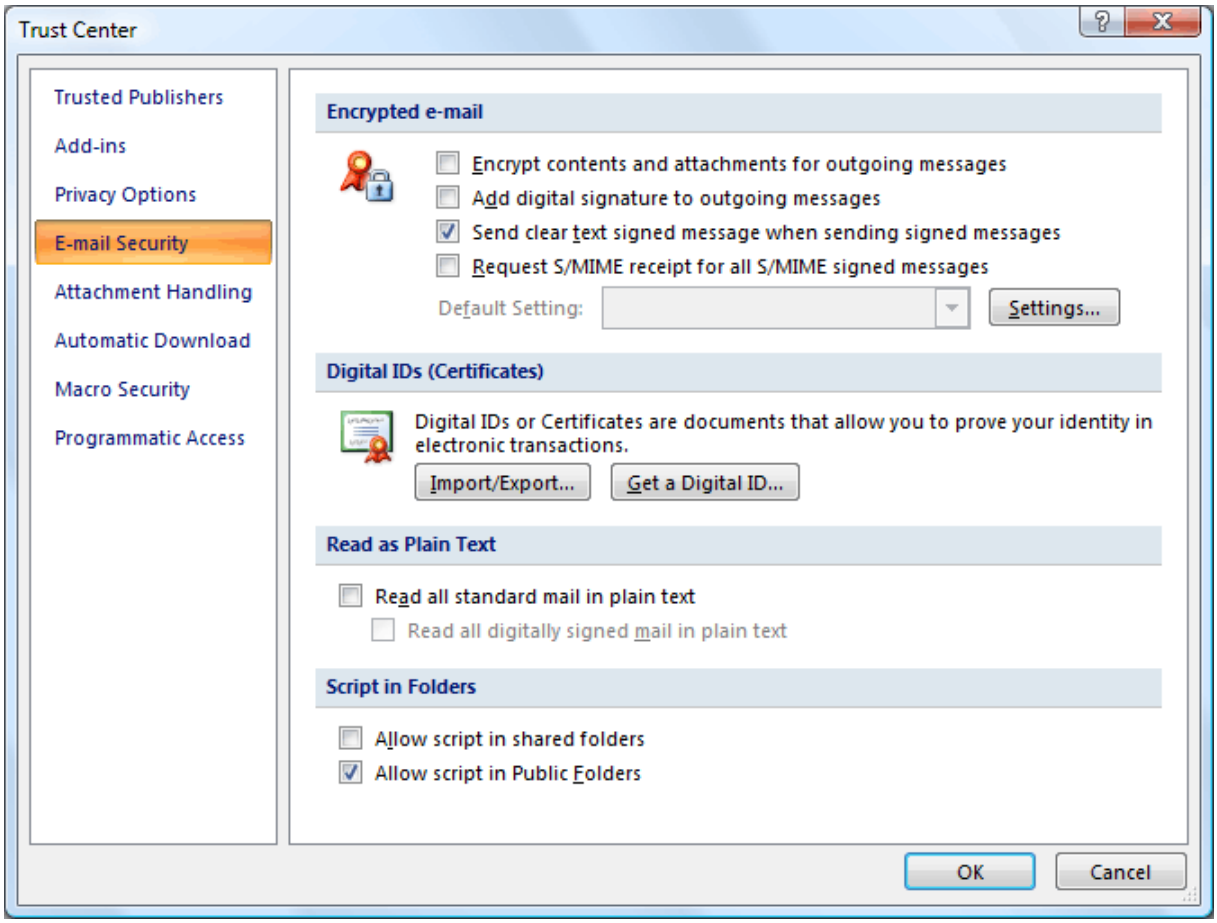


**Figure 6.27** Settings of verification of signed messages

### 6.13.4 Error in settings of contact folders used as address books

During the startup process of *MS Outlook* extended with the *Kerio Outlook Connector*, a warning can be displayed that informs of an error detected in settings of contact folders which are used as address books.

This error can be fixed by removing all address books in *MS Outlook*:

1. In the *Tools* menu, select *E-mail Accounts* To open a wizard where new accounts and address books can be created. In the wizard, select *View or change existing directories or address books*.

2. Remove all listed address books and close the wizard.

3. Restart *MS Outlook*.

Removing address books does not delete contact folders. All contacts are kept intact. Once all address books are removed from *MS Outlook* and the application is restarted, it is possible and recommended to add the address books again (for details, see chapter 1.7.4).

### 6.13.5 Problems with displaying of Free/Busy information

Failures of connection of *MS Outlook* to the *Kerio Connect's* built-in *Free/Busy* server may be caused by the following issues:

#### *Free/Busy server and SSL encryption*

If traffic over SSL is enabled in a *Kerio Outlook Connector* account settings, the *Free/Busy* server requires installation of a valid SSL certificate. This certificate can be installed in Internet Explorer. Detailed instructions are provided in section 5.4.1.

#### *Collisions with configuration of the URL server*

If the meeting scheduling with the *Free/Busy* server does not work properly (i.e. the *Scheduling* tab does not work correctly) while the connection to *Kerio Connect* via MAPI is alright, the problem might be solved by changing the URL address for connection to the *Free/Busy* server.

After installation and upon each startup of the *Kerio Outlook Connector* and account configuration, the correct URL address is set automatically (it is not necessary to change it).

Problems might arise when the user changes the address for any reason. If the address is not set correctly, it is not possible to connect to the *Free/Busy* server.

If any problems with connection to the *Free/Busy* server arise, check the following settings:

1. In *Tools* → *Options*, open the *Preferences* tab (see figure 6.28) and in the *Calendar* section click on *Calendar options*.

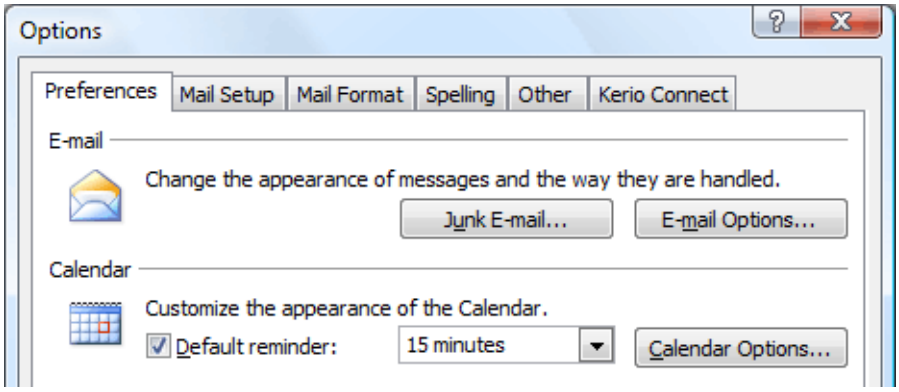


**Figure 6.28** Preferences

2. In the *Calendar options* dialog, click on the *Free/Busy options* button at the bottom of the window (see figure 6.29).

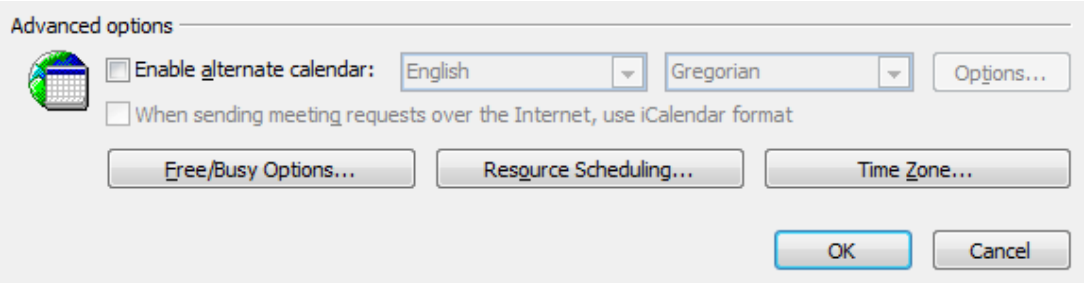


**Figure 6.29** Calendar Options

3. This opens the *Free/Busy options* dialog. Check the *Search location* settings. This entry must include the URL address at which the *Free/Busy* server is located (the *Kerio Connect's* address in this specific case). The URL address must follow this pattern:

   `http://ip_address_of_the_server:port/freebusy/%SERVER%/%NAME%`

   An example of correct URL address is shown at figure 6.30.

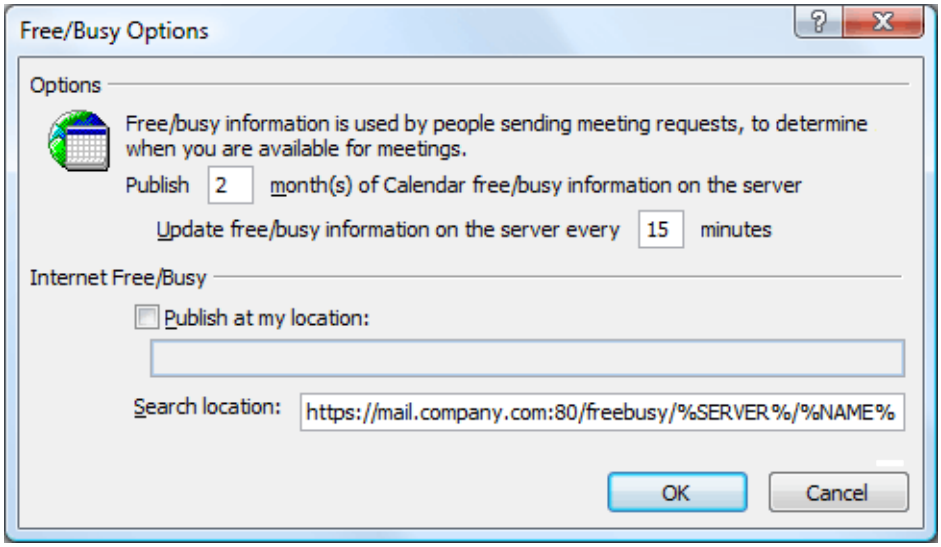


**Figure 6.30** Free/Busy options

Chapter 7

# Support for Windows Calendar

*Windows Calendar* is a *Microsoft Corporation's* application used for calendar management on *Windows Vista* and higher. This application enables to view events of multiple calendars in a single schedule and thus quickly identify conflicts in the time schedule. Calendars may be either stored on the disk or it is possible to subscribe for calendars stored at the web server. It is also possible to publish calendars on the web server.

*Kerio Connect* supports publishing of calendars in user email accounts on the server and subscription of calendars stored in the mailbox from the *Windows Calendar*. In addition to subscription to their own calendars, users can also subscribe to calendars shared by other users.

***Warning:***

1. In *Windows Calendar*, subscribed calendars are available only in the read-only mode. Published calendars are available on the server for reading only (this implies that it is not edit published calendars when accessed by *Kerio WebMail*, for example).
2. The *Windows Calendar* application does not allow connection to more than one user account located on a single server at a time.
3. *Kerio Connect* does not support tasks created and saved in *Windows Calendar*.

*Note:*
If calendars published as subfolders of the default calendar called *Calendar*, all events will also be displayed in the *Free/Busy* calendar.

## 7.1 Subscription to calendars

It is possible to subscribe any calendar stored on the WebDAV server in the iCal format. This implies that it is possible to subscribe to calendars stored in *Kerio Connect* and/or iCal calendars stored on any other WebDAV server supporting the iCalendar format.

To enable subscription of a calendar in *MS Outlook*, the calendar needs corresponding access rights.

If the calendar is located in *Kerio Connect*, it depends whether it is your calendar or a calendar of another user. It is necessary that the calendar's owner shares the calendar (at least by enabling read rights).

Calendars can be subscribed through the *Share* → *Subscribe* menu:

1. To subscribe a calendar in *Kerio Connect*, a valid URL is required (see figure 7.1). The address must follow this pattern:

   `http://server_name/ical[path]`

   *Note:*
   The URL of your *Kerio Connect's* calendar is available in the *Kerio WebMail's* section *Settings* → *Integration with Windows*. In the *Google Calendar, Windows Calendar* section you will find your calendar's URL.

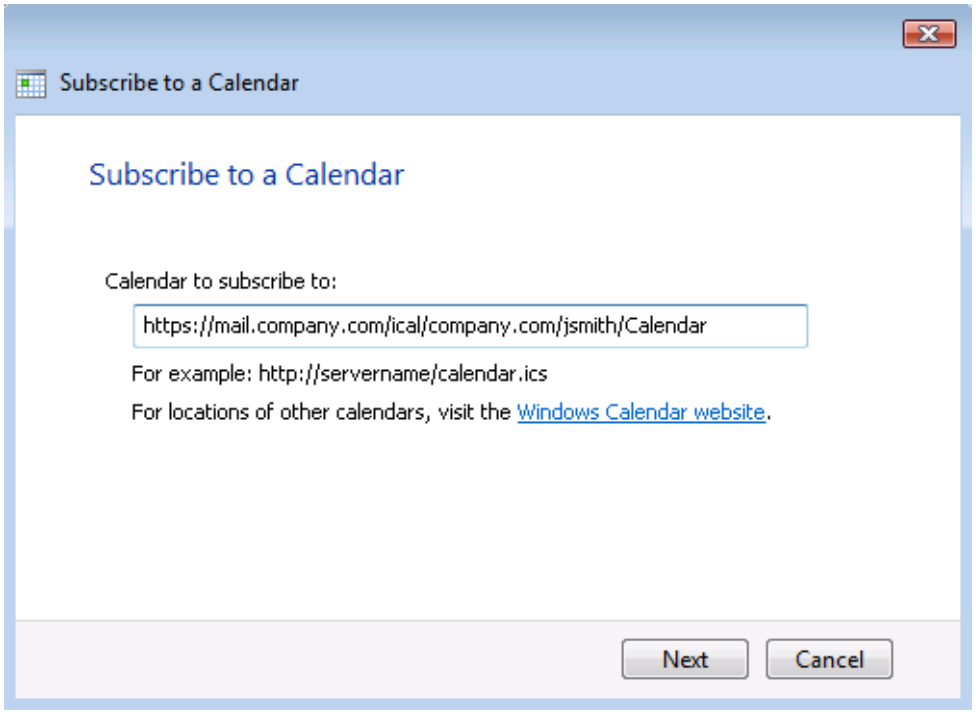


**Figure 7.1** Subscription to calendars

   For better understanding of the URL specification, view the following examples:

   - To subscribe the default calendar folder which belongs to your mailbox in *Kerio Connect*, enter the URL in the following format:

     `http://server_name/ical`

     for example:

     `http://mail.company.com/ical`

   - It is also possible to subscribe another user's calendar, if the user shares it for you. For the login URL, use the following pattern:

     `http://server_name/ical/domain/user_name/calendar`

for example

`http://mail.company.com/ical/company.com/wsmith/PersonalCalendar`

- To subscribe the default calendar, use the following URL format:

  `http://server_name/ical/public`

- It is also possible to subscribe another user's calendar(s), if shared. The following URL format must be used:

  `http://server_name/ical/public/calendar_name`

Secured, SSL-encrypted version of the HTTP protocol can also be used for subscription to a calendar. Some servers may even require encrypted connection. In such cases, use the `https://` string instead of `http://`.

> ***Warning:***
> If SSL encryption is used, it is necessary that a valid SSL certificate is installed on the host.

2. Once a valid URL address is entered, click on *Next*.

3. This opens a window for specification of login username and password for connection to a *Kerio Connect* account. When logged in successfully, the next page of the wizard is opened where other parameters of the subscribed calendar can be set (see figure 7.2):

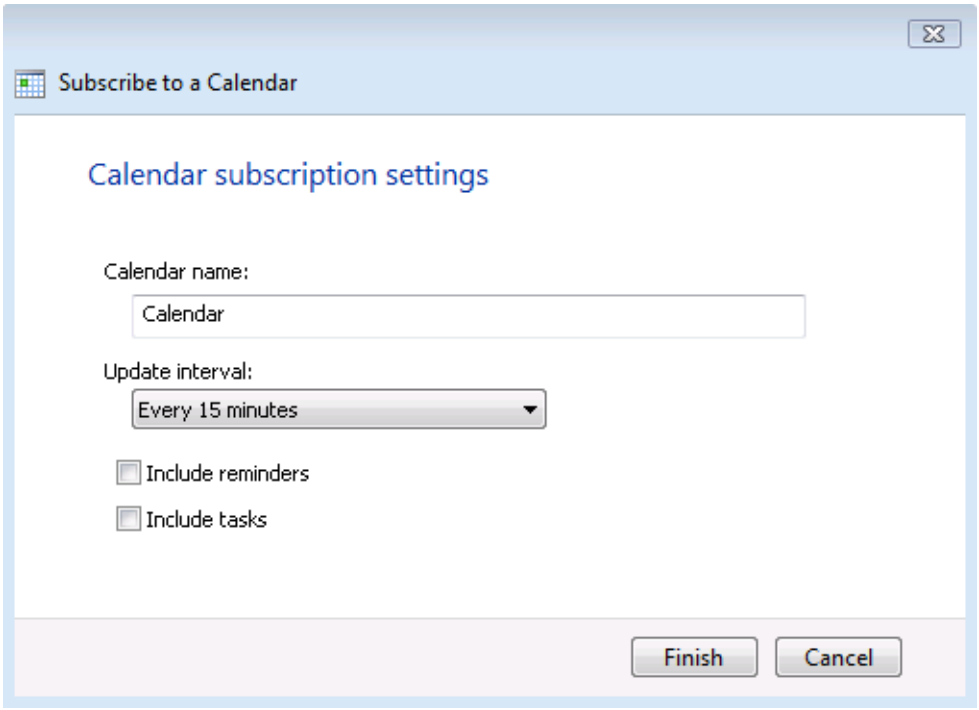


**Figure 7.2** Subscription to calendars

**Calendar name**
Name of the calendar for reference in *Windows Calendar*. Name of the corresponding calendar folder as saved in *Kerio Connect* is automatically filled in the entry. This name can be edited.

**Update interval**
The *Update interval* menu allows setting of regular refresh of the calendar.

**Include reminders**
The option allows including of reminders in the calendar subscription. However, subscription of reminders is not recommended. The calendar is in read-only mode and reminders cannot be closed.

**Include tasks**
Not supported in *Kerio Connect*.

***Warning:***
In *Windows Calendar*, subscribed calendars ara available only for reading and it is therefore not possible to edit, add or remove individual events.

## 7.2 Calendar publishing

Calendars can be published to the following stores:

- to a personal account in *Kerio Connect*,
- to an account of another *Kerio Connect* user (username and password are required unless the user creates a new calendar folder and shares it),
- to any WebDAV server in the Internet

In their stores on the server, published calendars are available for reading only and it is therefore not possible to edit events or add new ones.

Calendars can be published through the *Share* → *Published* menu. This opens a dialog (see figure 7.3), where URL address can be specified and other publishing parameters can be set:

**Calendar name**
Name of the current calendar name is automatically filled in. It is possible to enter name of any calendar included in *Windows Calendar*.

**Location to publish calendar**
URL location where the calendar will be published must be specified in one of the following ways:

- To publish a calendar in the root folder (of a particular mailbox), enter URL in the following format:

  `https://server_name/ical`

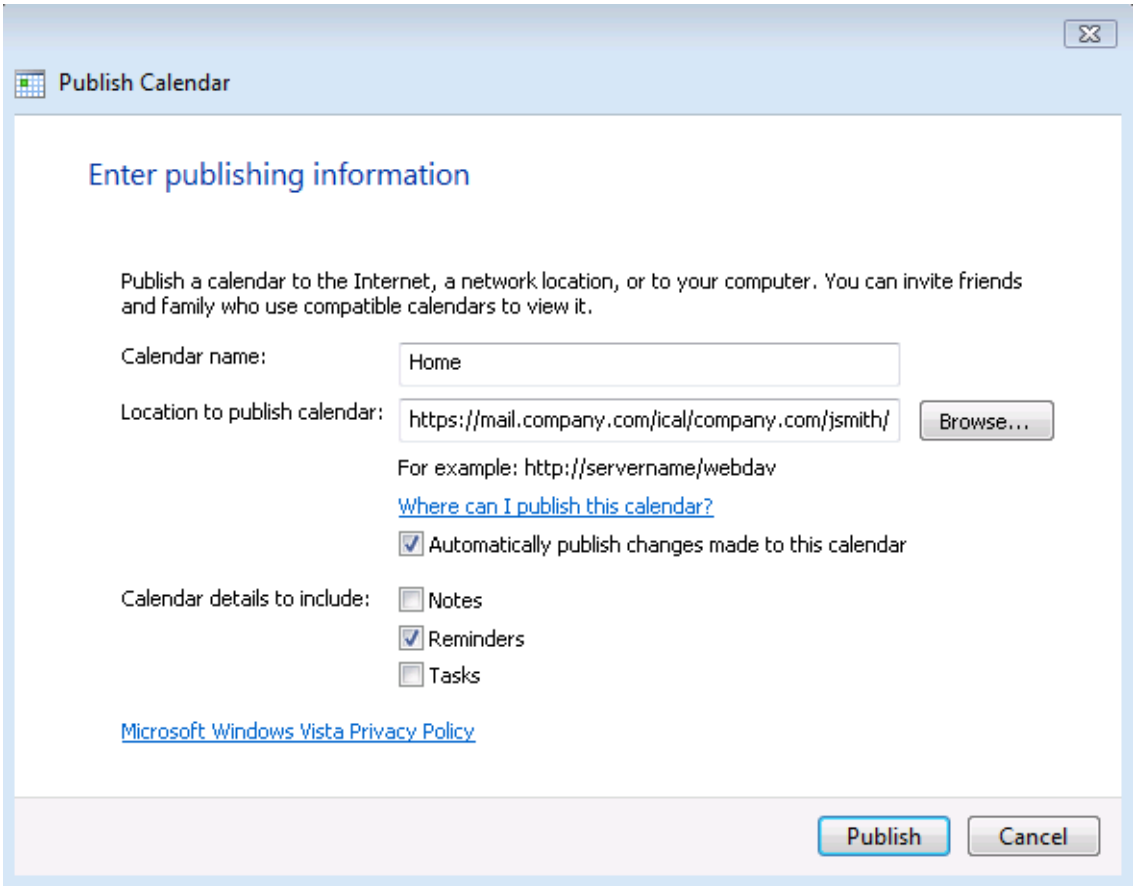


**Figure 7.3** Calendar publishing

for example:

`https://mail.company.com/ical`

- To publish a calendar in the `calendar` folder (of a particular mailbox), enter URL in the following format:

  `https://server_name/ical/calendar`

**Automatically publish changes made to this calendar**

This option enables/disables automatic update of the published calendar. If this option is enabled, each change performed in *Windows Calendar* is automatically applied also in the calendar saved on the server.

**Calendar details to include**

Several options are offered:

- *Notes* — enables synchronization of notes attached to events.
- *Reminders* — includes reminders in the synchronization process. However, publishing of reminders is not recommended. Calendars on the web are available only for reading and it will be therefore not possible to close subscribed reminders.

- *Tasks* — not supported in *Kerio Connect*.

Clicking on the *Publish* button opens a window for connection to the email account by user password. It is recommended to specify username including the domain even if the user's account is located in the primary domain (see figure 7.4). After successful verification of the user information, the calendar is published in the *Kerio Connect's* store.

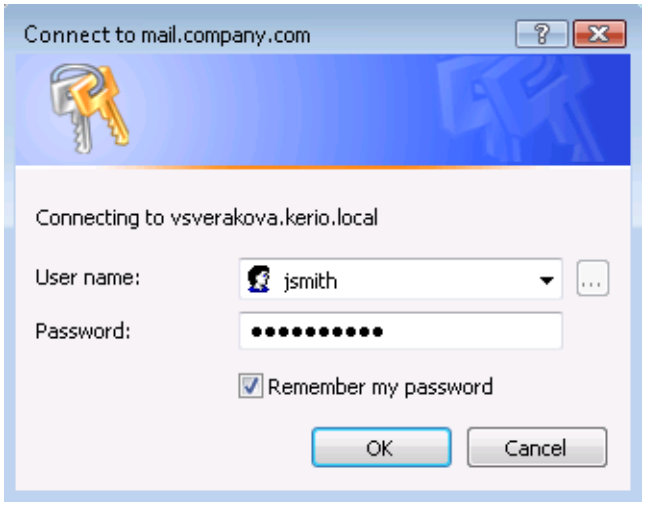


**Figure 7.4** Connection to the email account

### *Unpublishing of a calendar*

Calendars can be unpublished as follows:

1. Click on the calendar with the right mouse button.
2. In the pop-up menu, click on *Stop Publishing*.

## 7.3 Sharing of calendars

Calendars published in *Kerio Connect* can be shared with other users to make it possible for them to subscribe it in their *Windows Calendar* or to view it in *Kerio WebMail* (if they have an account in the same *Kerio Connect*).

To share a calendar, follow these instructions:

1. Log in the *Kerio WebMail* interface.
2. Create a special calendar folder (e.g. `Shared_Calendar`). Creating of new folders in *Kerio WebMail* is addressed in chapter 1.12.5.
3. Share the folder with corresponding users.
4. Publish a *Windows Calendar* calendar to the folder just created. The URL for publishing will be as follows:

   `http://server_name/ical/Shared_Calendar`

***Warning:***
It is always necessary to share the entire folder in which the calendar is published. If only the calendar itself is published, the sharing will be removed upon next update (publishing of anew version). This is caused by the fact that calendars are recorded on the servers in the way that the original version of the calendar is removed first (including possible sharing) and then a new version is saved to the server.

Chapter 8

# Kerio Connect Account Assistant for Mac OS X

Since Kerio Connect 7.3, you can use *Kerio Connect Account Assistant* on Mac OS X 10.5 and higher. It is a single autoconfig tool which enables one-time auto-configuration of the following application:

- Apple Mail
- Apple iCal
- Apple Address Book
- Microsoft Outlook
- Microsoft Entourage

How to configure these application with Kerio Connect Account Assistant?

1. In your browser, open the Mac OS X integration page (typically at `http://server_name/integration`).

   > ***Warning:***
   > Kerio Connect Account Assistant is unique for each user. Therefore, it is necessary to download it from your own integration page.

2. Click on *Set up my Mac* (figure 8.1) and download Kerio Connect Account Assistant to your computer.

3. Once the download finishes, the installation program gets started — confirm installation and run it.

4. The following installation page allows you to select products to configure (see figure 8.2).

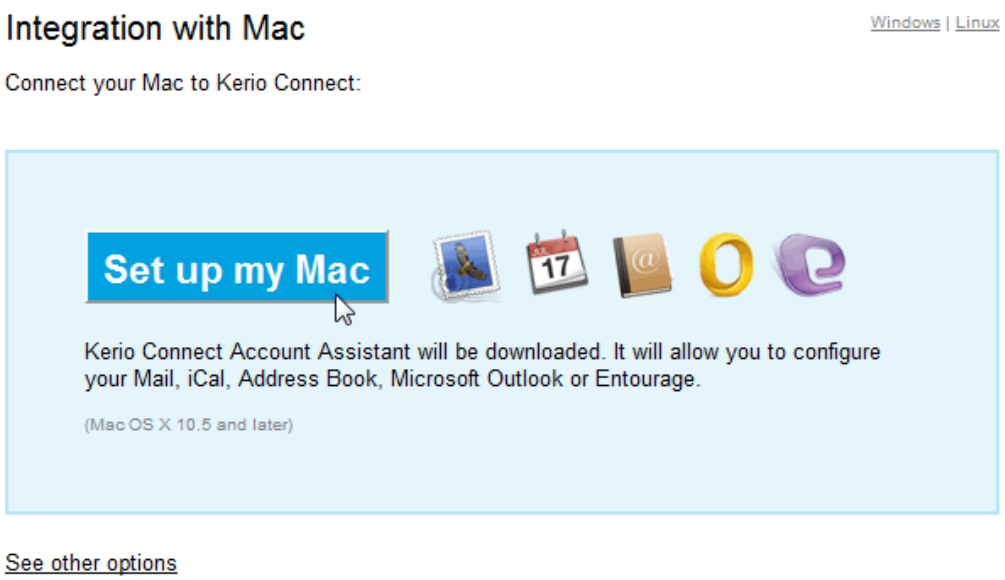


**Figure 8.1** Kerio Connect Account Assistant — download

**Figure 8.2** Kerio Connect Account Assistant — selecting applications to configure

*Note:*
Products installed on your computer will be offered. Select those you will use. Later you can add more of them by following the same procedure.

5. On the next page, enter your Kerio Connect user account password (user name is suggested already) and click on *Continue*.

   Now the configuration application verifies your identity and server connection.

6. Once connection and password are verified successfully, click on *Configure* to run configuration of the selected applications.

7. If the configuration is completed successfully, close the dialog box. Now the configured applications are available and ready.

*Note:*
All previous configuration modules are available at the integration page, upon clicking on *See other options* (see figure 8.1).

Chapter 9

# MS Entourage support

*MS Entourage* is an *MS Office for Mac* email client supported by *Kerio Connect*. This support uses the interface for *MS Exchange* in *MS Entourage* and it includes:

- support for groupware data such as mail, calendars, contacts and public folders,
- *Free/Busy* server for meetings management,
- connection of various LDAP databases for contact look-up
- learning of the Bayesian filter by moving folders to Junk E-mail or INBOX (for detailed information, see chapter 6.7),
- Out-of-office automated replies.

Cooperation of *Kerio Connect* with *MS Entourage* is supported directly. This means that no extension is required to be installed at client stations. It is only necessary to set correctly the basic parameters for an *Exchange* account.

For the list of supported versions, refer to the Kerio Connect product pages.

***Warning:***
Each user profile in *MS Entourage* can be used for an only *Exchange* account. Any other account will be dysfunctional. Functionality of POP3 and IMAP accounts is not affected by the account settings.

Differences between *MS Entourage 2004* and *MS Entourage 2008* are shown in table 9.1.

| Character | MS Entourage 2004 | MS Entourage 2008 |
|---|---|---|
| Searching contacts via LDAP | YES | YES |
| Free/Busy support | YES | YES |
| Delegating folders | YES | YES |
| Support for public folders with contacts and calendars | YES | YES |
| Support for calendar and contact folders in a single account | YES | YES |
| Support for Out-of-office | NO | YES |

**Table 9.1** Supported features

## 9.1 Basic account settings

The simplest and fastest way to configure *MS Entourage* is by using the *Kerio Connect Account Assistant* autoconfig wizard. For details, see chapter 8.

To configure *MS Entourage* manually, follow these instructions:

### *MS Entourage manual configuration*

Whenever a new profile is created or right upon a successful installation of the application, the *Entourage Setup Assistant* is started automatically. It is recommended not to use this wizard to create a KMS (Exchange) account.

*Note:*
Settings for *MS Entourage* can slightly differ for versions 2004 and 2008. The following description matches the *MS Entourage 2008* configuration.

Follow these instructions to set the account:

1. In the *Tools* menu, select *Accounts*. This opens the account management dialog (see figure 9.1). In this dialog, click on *New*. In the new account wizard just opened, click on *Configure Account Manually* and in the menu select the *Exchange* account type.

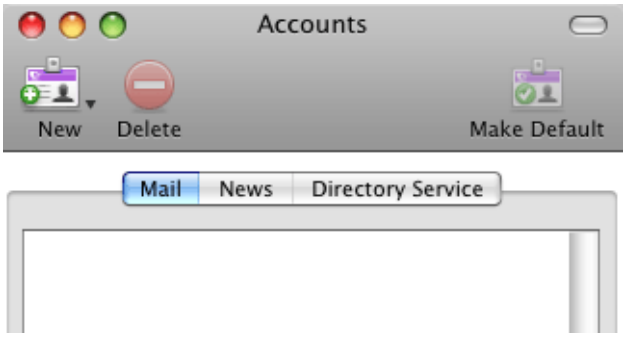


**Figure 9.1** Accounts

2. This opens an Exchange account settings dialog (see figure 9.2). On the *Account Settings* tab, set the following parameters:

   **Account name**
   The name of the email account.

   **Name**
   Any name (the first name and last name of the user is recommended) that will be displayed in the message header.

   **E-mail address**
   The email address of the user.

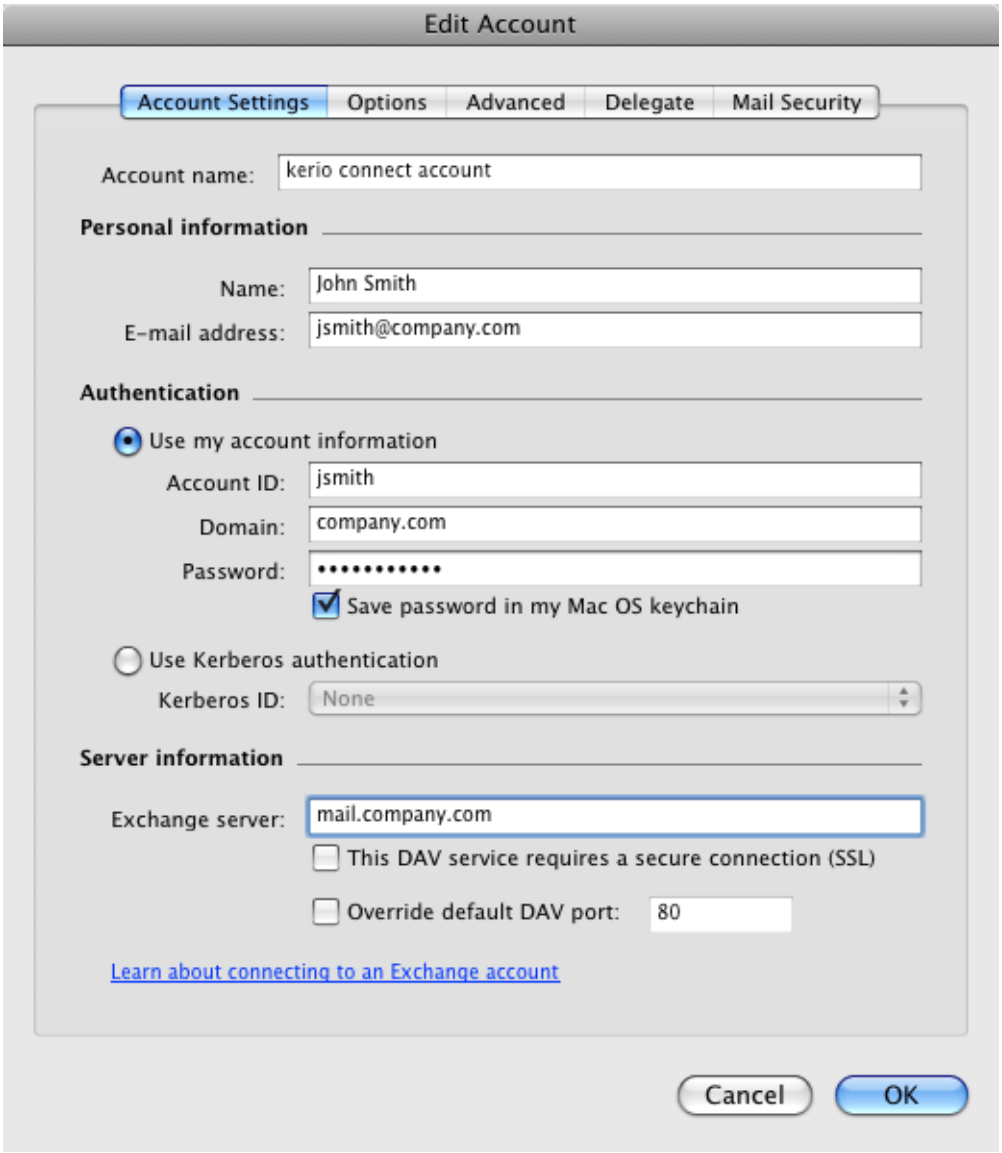


**Figure 9.2** Account Settings

**Account ID**

Username used for login to *Kerio Connect*. The username is specified as `user` without the at sign and domain.

**Domain**

Name of the email domain where the user has an account.

**Password**

The password used for accessing your account in *Kerio Connect*.

**Exchange server**

DNS name or IP address of the machine where *Kerio Connect* is running.

The traffic between *Kerio Connect* and *MS Entourage* is usually maintained through the WebDAV interface (HTTP protocol) at port 80. If HTTP in *Kerio Connect* is running

on a non-standard port, it is necessary to enable the *Override default DAV port* option and change the port.
The traffic can also be secured by SSL. To encrypt the traffic, use the *This DAV service requires a secure connection (SSL)* option. When it is checked, the port in *Override default DAV port* is changed to port 443 (the default port for HTTPS). If another port number is specified, it is necessary to check also the *Override default DAV port* and change the port number to 443. Otherwise, connection to *Kerio Connect* fails. It is also necessary to change the port if HTTP(S) protocol in *Kerio Connect* communicates at a non-standard port. In such a case, it is necessary to specify the port number used by *Kerio Connect* for HTTPS traffic.

3. In the *Advanced* tab, set connection to a *Free/Busy* and to a LDAP server (see figure 9.3):

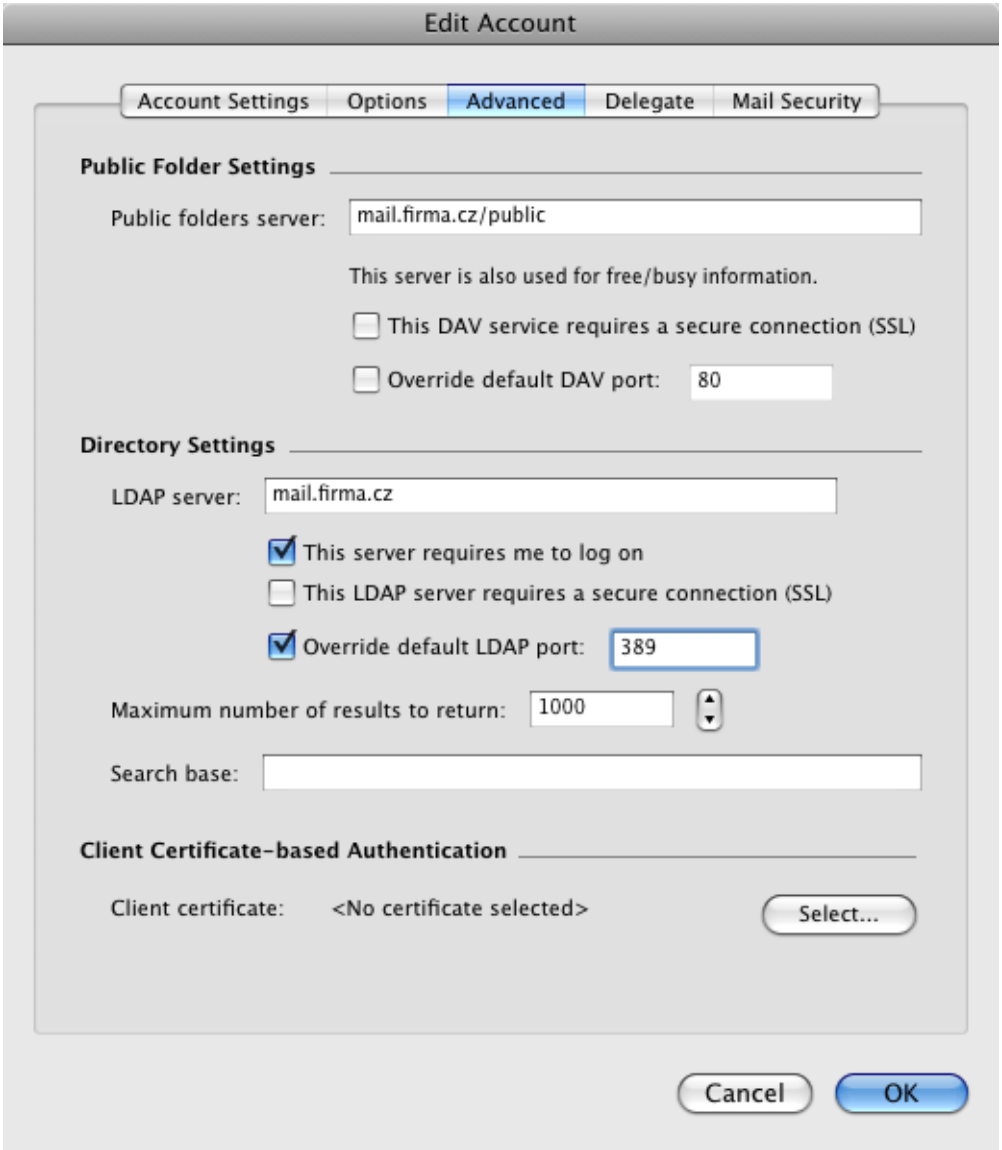


**Figure 9.3** Advanced

**Public folder server**

In the entry, it is possible to enter a URL address to the *Free/Busy* server. The *Free/Busy* server is a public calendar that displays free/busy information for all users that have an account in *Kerio Connect* and work with the calendar in *MS Entourage*, in *MS Outlook* or in the *Kerio WebMail* interface. For detailed information on usage of this feature, refer to chapter 9.3.

**This DAV service requires a secure connection (SSL)**

It is also possible to connect to the *Free/Busy* built in *Kerio Connect* via secured SSL. If the HTTPS service in *Kerio Connect* is running on a standard port, simply enable this option. The port in *Override default DAV port* is changed to 443 (see figure 9.15).

**Override default DAV port**

If *Kerio Connect* communicates at a non-standard port, check this option and overwrite the port.

**LDAP server**

Enter DNS name of IP address of the LDAP server (typically the address of your *Kerio Connect*) — see figure 9.3.

*Note:*

*MS Entourage* supports only the default private Contacts folder. It does not support for displaying of shared (unless delegation is set) and public contact folders nor it supports private contact subfolders created in *Kerio WebMail* (unless they are shared and connected by delegation). However you can add addresses from these other Contact folders through an LDAP search when creating a new email (see chapter 9.2).

**This server requires me to log on**

This option must be used if you want to use the LDAP database in *Kerio Connect* since the LDAP server in *Kerio Connect* does not allow anonymous connections.

**This server requires a secure connection (SSL)**

Communication with the LDAP server in *Kerio Connect* can be secured by SSL. If this encryption is used, it is also necessary to change the port in *Override default LDAP port* (standard port for LDAPS is 636).

**Override default LDAP port**

By default, *MS Entourage* uses a non-standard port where the *MS Exchange* email client is run. Whenever a user connects to *Kerio Connect*, they must change the port to the port on which the *Kerio Connect's* LDAP service is running.

It is therefore necessary to check this option and enter the correct port number and every time. The standard port number for the non-secured LDAP is 389 and the standard port number for SSL-secured LDAP is 636. If the LDAP service in *Kerio Connect* is running on a non-standard port, specify the port used by the LDAP(S) service in *Kerio Connect*.

## 9.2 Connection to the LDAP server

*MS Entourage* enables connection to any number of LDAP databases for contact look-ups. New LDAP can be added on the *Directory Service* tab in *Tools* → *Accounts*:

**Figure 9.4** LDAP settings

**Account name**
Name of the account, used for reference only.

**LDAP server**
DNS name or IP address of the computer where LDAP server is running (e.g. mail.company.com or 192.168.1.10).

**This server requires me to log on**
This option must be used if you want to use the LDAP database in *Kerio Connect* since the LDAP server in *Kerio Connect* does not allow anonymous connections.

- *Account ID* — user name. When connecting to the *Kerio Connect's* LDAP database, it plays a role whether the user is created in the primary domain. If the user is created in a domain which is not primary, the username must include the domain for the specification. This implies that the *Account ID* pattern will be

as follows: `user@domain` (`jwayne@company.com`). If the user is created in the primary domain, simply use the `user` (`jwayne`) pattern for the specification.

- *Password* — user password

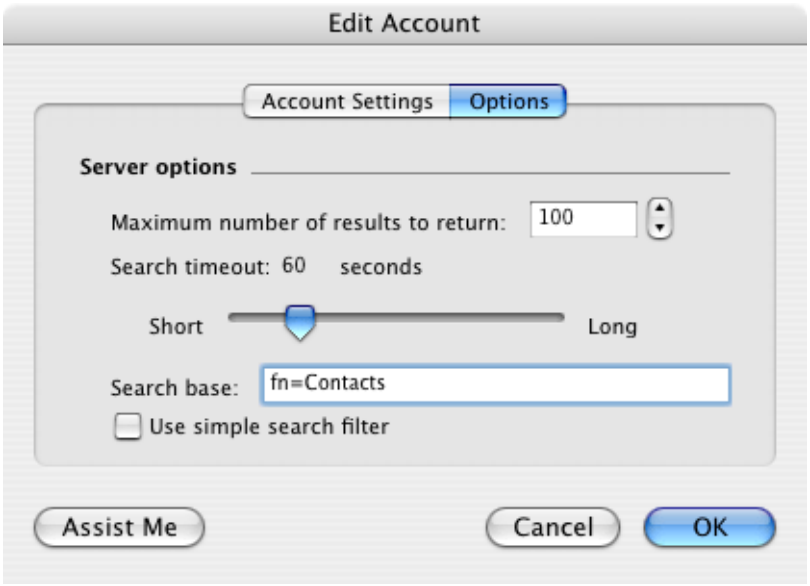


**Figure 9.5** LDAP settings

### Search base

Specify a location of contacts in the LDAP database (see above). If the entry is not specified, all subscribed contact folders will be searched through.
If you want to access all private and subscribed shared and public folders, leave the entry blank or enter this string:

`fn=ContactRoot`

More precise specification of searched section of the LDAP database enables to access only some types of contacts. To better understand various alternatives, read the following examples:

- `cn=wsmith@company.com,fn=ContactRoot`
  (the look-up will be performed only in folders of the `jsmith@company.com` user)
- `fn=personal,fn=ContactRoot` (only folders of the user currently connected to the LDAP server will be searched through. This option is identical with the previous one, however, it is not necessary to specify username (or email address) of the user. This option may be helpful for example when configuring multiple clients, etc.)
- `fn=public,fn=ContactRoot`
  (only public contact folders will be searched through)
- `fn=Contacts,cn=wsmith@company.com,fn=ContactRoot`
  (only the `Contacts` folder of the `jsmith@company.com` user will be searched through)
- `fn=Public Folders,fn=public,fn=ContactRoot`

(only the public `PublicContacts` folder will be searched through)

## 9.3 Scheduling of meetings

As well as in *Kerio WebMail* (see section 1.8.7) and *MS Outlook* (section 6.9), in *MS Entourage* it is also possible to schedule meetings using the Free/Busy server built in *Kerio Connect*.

*Free/Busy* server is a special tool allowing us to see when other participants of a meeting are busy or free for the meeting. To see whether the participant is free or not, go to the edit dialog's *Scheduling* tab (see figure 9.6).

*Free/Busy* server exploits information on user's free time from the calendar of the particular user. However, the meeting initiator can only see when the attendee is free or busy. It is not possible to view particular details on the user's activities.

The *Free/Busy* feature also provides information on how much busy the user is. Degree of user's busyness is suggested by the color. The color key is shown at the bottom of the *Scheduling* tab.

This implies that this type of calendar is perfect for planning of meetings and sessions. The user who adds a new meeting can view when the people involved are free or busy. It is therefore not necessary to ask individual users when they are free. However, the following conditions must be met to enable this function:

- all users must have an account in *Kerio Connect*,
- the users involved must manage their events by a calendar in *MS Entourage*, in *MS Outlook* (with the *Kerio Outlook Connector*) or in *Kerio WebMail*.

The *Free/Busy* calendar displays all meetings and events included in the default calendar folder and its subfolders. If you want that some events (e.g. items of a private calendar) are not shown in the *Free/Busy* calendar, create a new calendar folder out of the branch of the default calendar and its subfolders.

### *Using the Free/Busy calendar for meetings*

If URL address for connection to the *Free/Busy* server is enabled for an account in its configuration (see chapter 9.1), users can easily choose the best time for their meetings. The *Scheduling* tab provides a list of all members of a particular meeting (with the *Invite* option) and time they are free or busy. The busyness of individual users is shown by different tints of blue. The *Free/Busy* server marks users for whom no information is available with grey (users who do not have an account on the same server, etc.).

***Warning:***
It is necessary to specify each user by their usernames and domains (`username@domain`). Aliases cannot be used to display *Free/Busy* information.

The purple box represents the meeting suggested. The window can be moved, extended or narrowed by the mouse pointer.

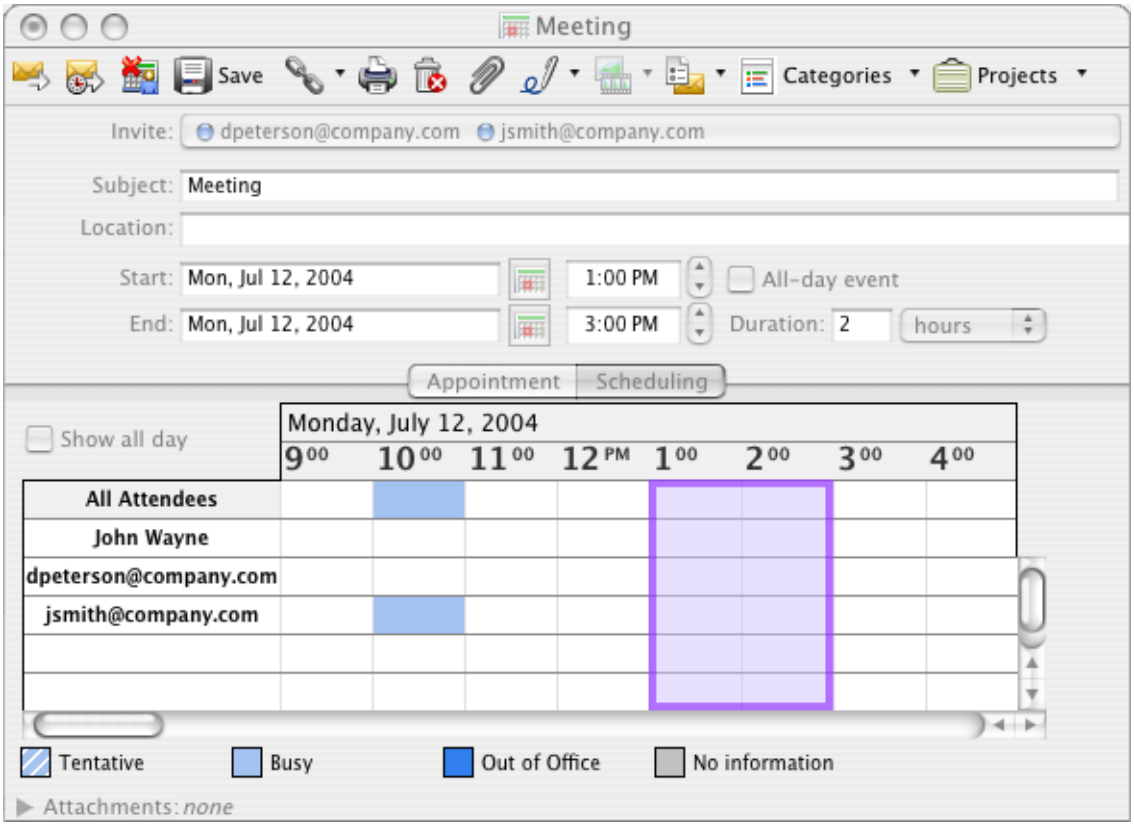


**Figure 9.6** Usage of the Free/Busy calendar

***Warning:***
For successful authentication to *Free/Busy* server, specify the *Subject* item in the *Appointment* tab.

## 9.4 Resources

*Kerio Connect* now provides an electronic management of resources shared by employees of your company. Resources are rooms and devices available in the company, such as OHPs, whiteboards, cars, etc. Resource management allows to:

- book a resource for a particular time,
- view current resources and their reservations in the Free/Busy calendar (for details on Free/Busy calendars and information on appointments, see section 9.3) when planning reservations,

- subscribe resource calendars by using standard sharing/delegation,
- set the resource manager who can decide on priorities in case of any collisions in reservations.

Resources can be booked by using the existing calendar system. Resource reservation is based on creating of en event. The feature works similarly as appointment scheduling. The main difference is that the *Attendees* tab must include the resource selected from the contact list (it can naturally also include contacts of attendees). In the *Free/Busy* calendar you can see whether the resource is available for the scheduled time or not.

*Note:*
To make a resource available for booking, it is necessary to create it in *Kerio Connect* first. If you need to create a new resource, contact your network administrator.

### *Resource scheduling*

*Note:*
The settings described are for *Entourage 2008*. If you use another version, settings may differ slightly.

To book a resource, follow these instructions:

1. Open a new event, enter its subject and time for which the resource should be reserved.
2. Add the resource(s) email address to *Invite* entry (e.g. `car1@company.com`).
3. In the event, go to the *Scheduling* tab.
4. If the Free/Busy calendar is working, existing reservations can be viewed in it. It is therefore easy to check right away, whether the source is free or already booked by another user for the suggested time (see figure 9.7).

You may have noticed that there are also other attendees in the list shown in figure 9.7. Resources can be reserved either for usual appointment or for meetings (see section 9.3).

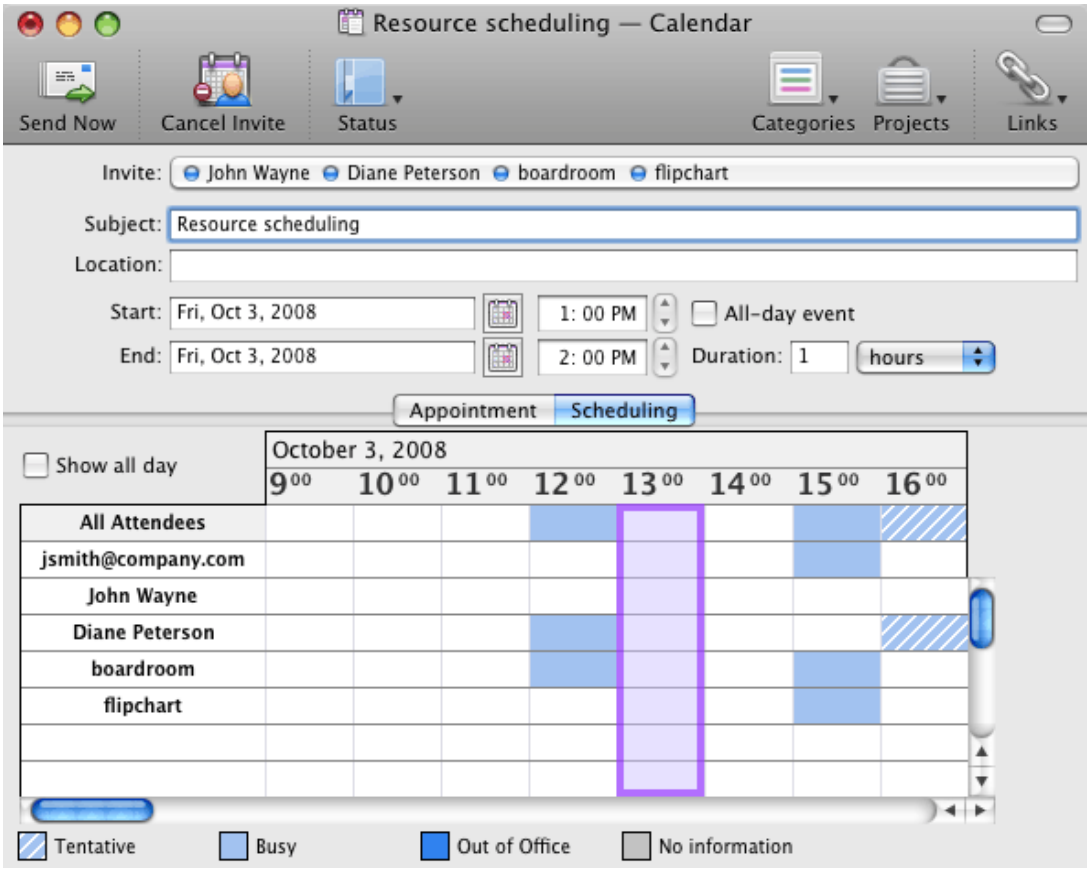


**Figure 9.7** Resource reservation

### *Resource calendars*

Each resource created in the system has its own calendar where all reservations are displayed. Calendars of individual resources can be subscribed through the standard delegation process (delegation of folders is focused in chapter 9.6).

Most user can access resource calendars in the read-only mode. Resource calendars can be edited only by the resource manager. The role of resource managers and their rights are addressed in the following section.

### *Reservation management*

In certain situations, it is necessary that a resource is booked even if it has already been reserved or that there is no other way than to make the reservation by a phone call. For such purposes, there exists a user with special rights who is a manager of the company resources. Resource managers can access resource calendars with administration rights. This implies that they can edit, remove or move reservations in the particular resource calendar. They can also create new reservations.

If you are a resource manager, first it is necessary to subscribe calendars of all resources that you would manage:

1. Go to *Tools* → *Accounts*.

2. Open the Kerio account and go to the *Delegation* tab (see figure 9.8).

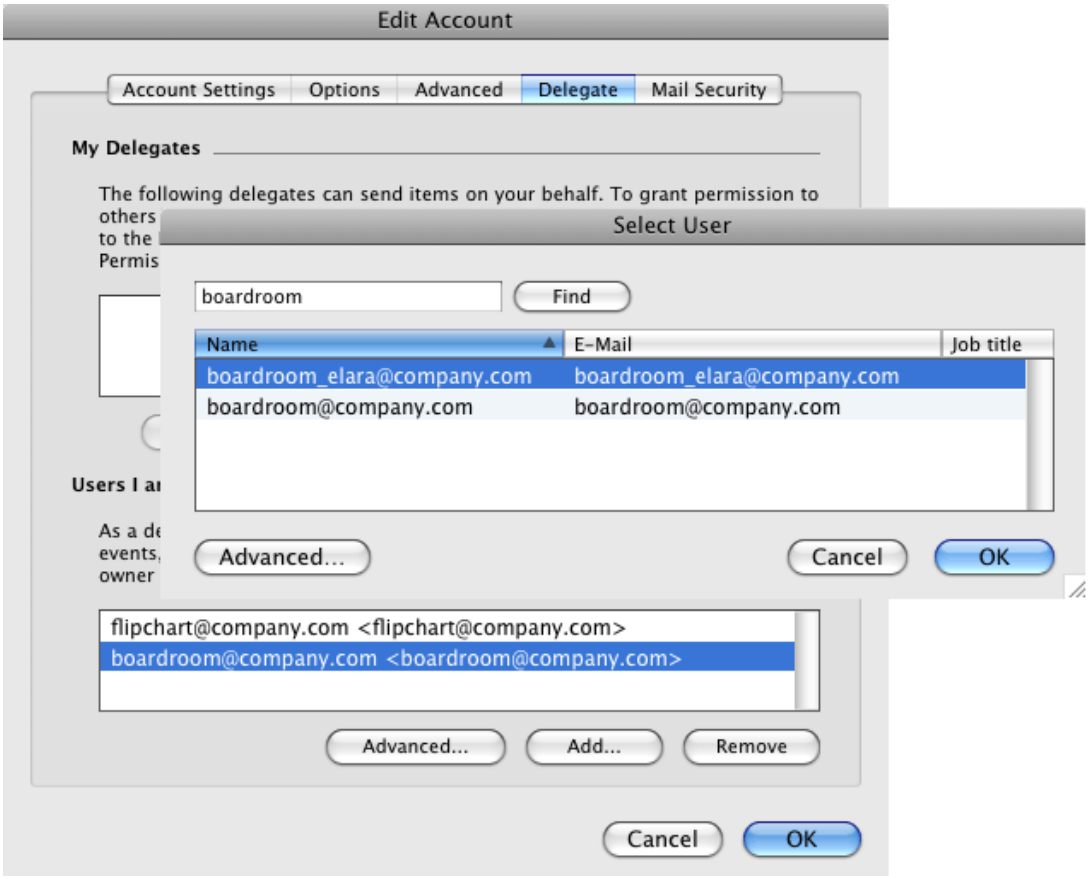


**Figure 9.8** Context pop-up menu of the root folder

3. In the *Users I am a delegate for* section, click on *Add* and in the *Select User* dialog, add a resource name and when the resource is found, confirm selection by clicking on *OK*.

4. If you manage multiple resources, subscribe to all their calendars as described above and shown at figure 9.8.

Once subscribed, calendars of individual resources are shown in the folder tree. Each resource calendar now shows all reservations of the particular item done by any users. The resource manager can edit reservation time, add new reservations or remove them if demanded.

## 9.5 Spam

Spam messages are mostly represented by advertisements. Spam are usually sent in bulk and the recipient addresses are obtained by illegal means (e.g. by tapping the network communication). In their wilder modifications, spams may also distribute and seed dangerous viruses.

*Kerio Connect* contains a sophisticated antispam filter. The filter is designed so that it can recognize specific attributes of spam from the message contents (spam messages usually contain specific keywords that can be recognized and counted by the filter). Each message is assigned a numeric score; if this value exceeds the limit set in *Kerio Connect*, the message is marked as spam.

The spam filter may let some spam messages through from time to time by mistake (their score is low) and mark some regular messages as spam (their score is too high). For the reasons above, the antispam filter allows modification to the database used for recognition of spam messages. This method, however, requires user input. Users have to reassign the incorrectly evaluated messages to correct types (spam / non-spam) so that the filter learns to recognize them in the future.

Messages which were marked incorrectly can be re-evaluated by moving them in corresponding folders. To be specific, to mark a message as spam, move it to the *Junk E-mail* folder. To mark a message as not spam, move it to *Inbox*.

*Note:*
In *MS Entourage*, messages marked as spam are also marked by specific visual signs. For example, the line representing the message has a different color (grey). However, these methods of spam-marking are not applied to messages moved manually. Such messages are distinguished as spam or not spam correctly by the server, but they are not changed visually. This implies that messages marked as spam are still displayed as spam and also displaying of messages marked as non-spam is not changed by moving them in the *Junk E-mail* folder.

## 9.6 Delegation and subscription of folders

Delegation of folders allows to share personal folders with co-workers. When can this feature be helpful? Imagine, for example, a situation where you cooperate with your teammate to handle purchase orders in your company. While your colleague is on vacation, you cannot handle orders delivered in her mailbox. However, if she has delegated the folder with purchase orders to you by leaving for vacation, you can easily access and handle the orders by yourself while she is out of office.

The following folder types can be delegated:

- email
- calendars

- contacts
- email, calendar and contact public folders

Practically, the user who delegates a folder simply assigns appropriate access rights to another user. The user whom the folder rights have been assigned simply subscribes the folder in their email client (*MS Entourage*). The following sections describe the delegation process.

### *Delegating folders in any email client*

This chapter focuses on situation where you use *MS Entourage* and your collaborator wants to delegate you a folder for instance from *MS Outlook*, the *Kerio WebMail* interface or another email client which does not support delegation but it supports sharing (more information on sharing can be found in chapter 1.12.5). The way of sharing folders to users who want subscribe them in *MS Entourage* is very specific. Therefore, read the following guidelines thoroughly:

1. In the email client, create a new folder of the highest level possible. You can name it for example *Delegation*.

2. Copy all folders to be shared with anyone into this folder (see figure 9.9).

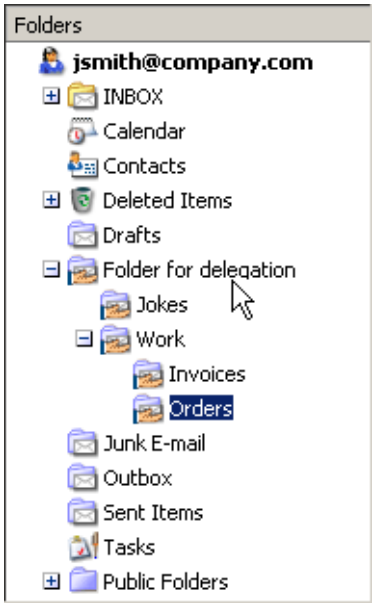


**Figure 9.9** Tree structure in Kerio WebMail — an example of a correctly created structure of delegated folders

3. Assign access rights for individual folders to appropriate users.

When delegating folders, rights cannot be granted to folders of lower levels of the tree. It is necessary that the folders are shared up to the highest level (the highest folder must be saved right under the root folder). If folders which are save in a non-shared folder, the user to which the folders are delegated cannot see and access these folders in *MS Entourage*.

For security reasons, it is not recommended to delegate for example the *INBOX* folder. It is recommended to delegate a new folder created from the root folder instead. All folders to be delegated must be moved to the new folder. Now, it is secure to grant access rights (see figure 9.9).

### *Folder delegation in MS Entourage*

In *MS Entourage*, it is not possible to use the standard delegation tool since it supports only *Microsoft Exchange Server*, not *Kerio Connect*. Nevertheless, it is possible to delegate folders with help of folder sharing available in *MS Entourage*.

In *MS Entourage*, it is possible to share any folder which includes at least one item (an email message, an event or a contact). To delegate folders by using this method, follow these guidelines:

1. Use the mouse pointer to select a folder to be shared with another user.

2. Open the folder's context menu (hold the *Ctrl* key and click on the folder) and select *Sharing*.

3. This opens a dialog where a user can be added and access rights for the folder can be assigned (see figure 9.10).

   To allocate rights, use the *Permission level* menu. The menu includes multiple options, however, only three can be used for configuration of rights in *Kerio Connect*:

   - Owner = administration rights
   - Editor = editing is allowed
   - Reviewer = for reading only

   It is recommended not to use the other options.

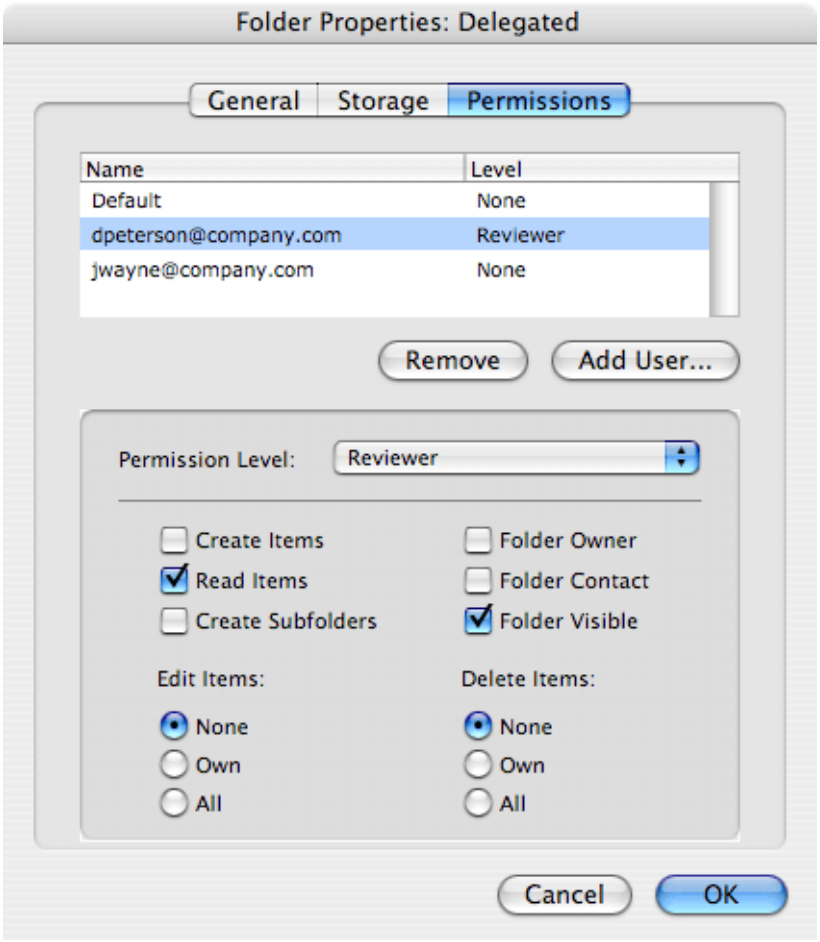


**Figure 9.10** Sharing folders

### *Folder subscription*

The following conditions must be met for subscription of delegated folders:

- Both users (delegator and subscriber) must use account in a single *Kerio Connect* and they must belong to the same domain.

  This rule does not apply to cases where users subscribe a public folder which is shared by all domains. This may involve users of any *Kerio Connect* domain.

- The delegator must set appropriate access rights for the folder in *MS Entourage* (by standard sharing methods), in *Kerio WebMail* or in *MS Outlook*.

- The subscriber's KMS (Exchange) account in *MS Entourage* must be set as primary.

Once the conditions above are met, subscribe delegated folders by following these guidelines:

1. Go to *Tools* → *Accounts*.

2. In the account edit dialog, on the *Delegate* tab (see figure 9.11), enter delegator's username including the domain (e.g. `gbush@company.com`).

**Figure 9.11** Connecting delegated folders

If the delegation is set correctly, the folders added appear in the folder tree in the main *MS Entourage* (see figure 9.12) window and it can be used in accordance with the rights assigned.

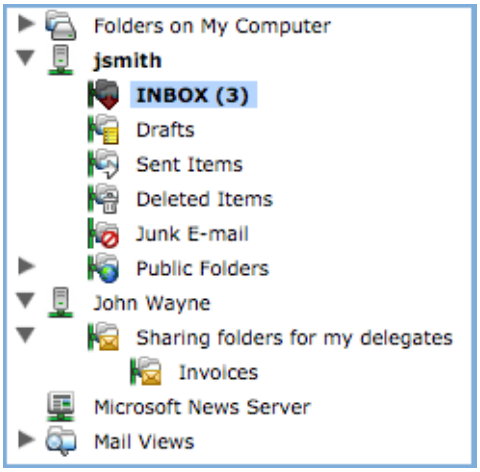


**Figure 9.12** Delegated folders in the tree

*Note:*
If contacts or calendars were delegated, these folders will be displayed separately. Delegated calendar folders will be displayed in the calendars section, while delegated contact folders will be displayed in the contacts section.

If subscription of delegated folders does not work, check whether the configuration of the account meets all the conditions described above.

## 9.7 Public folders

Public folders are special type of folders which are shared for reading to all users of the particular domain or of the particular mailserver (it depends on server settings). Public folders help especially share information across the company. For example, company's events are set in the public calendar so that everybody can see when the events happen and view their details, while the person who is responsible for setting of such events can see who is available for the corresponding event. Another advantage of this feature might be for example sharing of public contacts across the company.

If you want content of public folders to be available even when you are not online, follow these instructions:

**Entourage 2004**
: Copy the public folder to favorite items.

**Entourage 2008**
: Copy the public folder to *Subscribed Public Folders*.

## 9.8 Out Of Office

*MS Entourage 2008* supports sending of automatic replies when the user is out of office.

This automatic reply can be enabled when a user cannot reply messages him/herself (e.g. when the user is ill or on vacation). It is usually helpful when the user is supposed to reply immediately.

To set automatic reply, go to *MS Entourage Tools* → *Out of Office*. In the Out of office dialog, switch to the *Send Out of Office messages* mode and enter a message which will be sent to incoming messages. Thus, senders know immediately that the user cannot send them any answering message at the moment.

Automatic reply will be applied to all incoming messages except email sent from mailing lists. The automatic answer is not sent where answering to another automatic email (this should prevent users from email loops).

**Figure 9.13** Out of Office Assistant

## 9.9 Secure communication of Kerio Connect with MS Entourage

The communication between *Kerio Connect* and *MS Entourage* can be protected by the standard SSL encryption protocol. It is possible to secure communication via the WebDAV interface as well as requests and responses between *MS Entourage* and the LDAP server built in *Kerio Connect*. Settings differ for each version of *MS Entourage*. Here you can find description of both alternatives:

### *Settings in MS Entourage 2004 and 2008*

To set WebDAV in *MS Entourage*, follow these steps:

- On the *Account Settings* tab in *Tools* → *Accounts*, enable the *DAV service requires secure connection (SSL)* option (see figure 9.14).

  *Note:*
  Enabling the *This DAV service requires a secure connection (SSL)* option also changes the standard port for HTTP service to the HTTPS port. Generally, it is therefore not necessary to change the port by hand.

- If the HTTPS service in *Kerio Connect* is running on another port than the standard port 443, it is necessary to enable the *Override default DAV port* option and change the port by hand.

Connection to the *Free/Busy* server built in *Kerio Connect* can also be SSL-secured. The connection between a client and the *Free/Busy* server is handled via the WebDAV interface. Therefore, the traffic can be secured by setting of the secure version of the DAV protocol. To set this, go to the *Advanced* tab under *Tools* → *Accounts* and enable the *This DAV service requires a secure connection (SSL)* option.

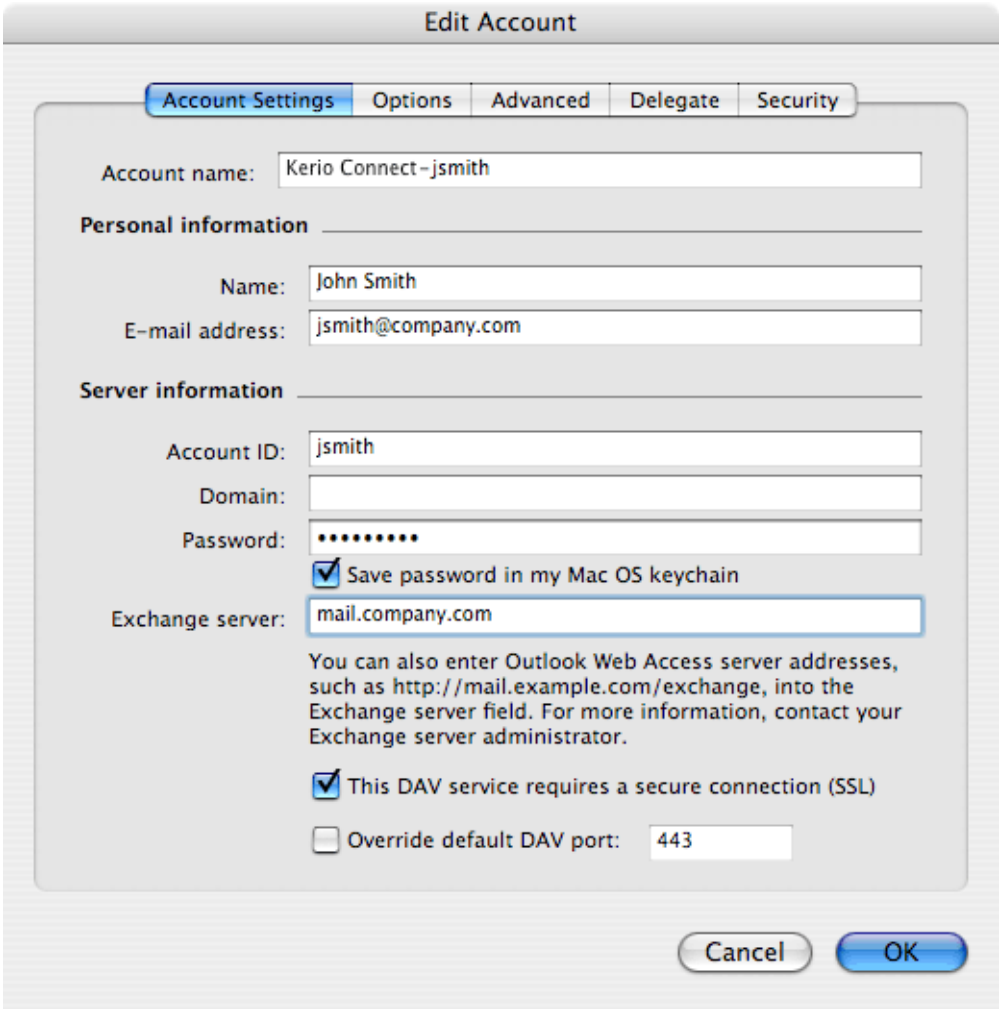


**Figure 9.14** Setting the secure WebDAV

*Note:*
Enabling the *This DAV service requires a secure connection (SSL)* option also changes the standard port for HTTP service to the HTTPS port. Generally, it is therefore not necessary to change the port by hand.

Setting of LDAPS in *MS Entourage* is also very simple:

- On the *Advanced* tab in *Tools* → *Accounts*, enable the *This LDAP server requires a secure connection (SSL)* option.
- It is also necessary to enable the *Override default LDAP port* option and overwrite the port number to the port where the LDAPS in *Kerio Connect* is running (standard port for LDAPS is port 636).

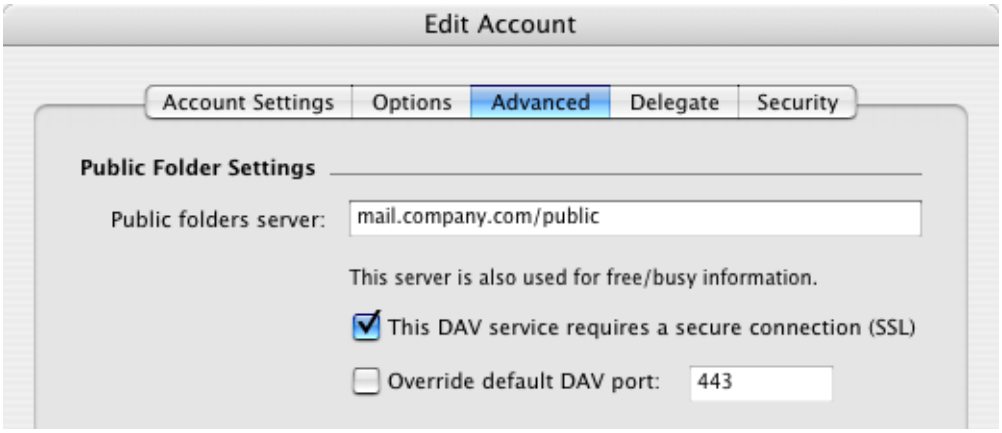


**Figure 9.15** Setting secure version of WebDAV for connections to the Free/Busy server

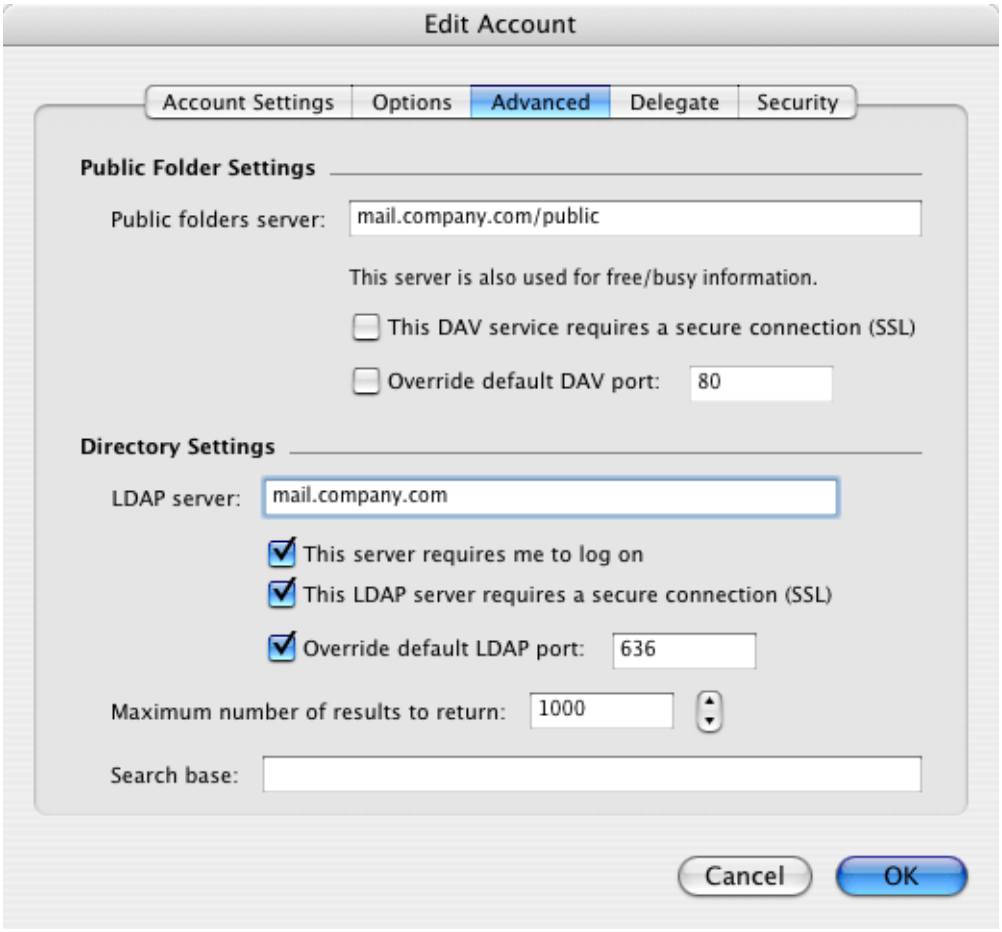


**Figure 9.16** Setting the secure LDAP

### *Importing SSL certificate*

This chapter describes the situation where *Kerio Connect* uses a self-signed certificate and a user tries to connect to it via SSL (DAVS and LDAPS in *MS Entourage*).

The security system of Mac OS X does not trust certificates which are not signed by a trustworthy certification authority (so called self-signed certificates). *Kerio Connect* uses the self-signed certificate by default. To make Mac OS X systems accept the *Kerio Connect's* self-signed certificate, do the following:

1. Run *Safari* and specify the corresponding URL to login to *Kerio WebMail*. SSL-secured protocol must be used for the connection to the server. This implies that the URL should start with `https://` (example: `https://mail.company.com/`).

2. Before the *Kerio WebMail's* login page is opened, an alert is displayed informing that the system is not able to authorize the server to which you are connecting since the certificate is authorized by an unknown authority (see figure 9.17).

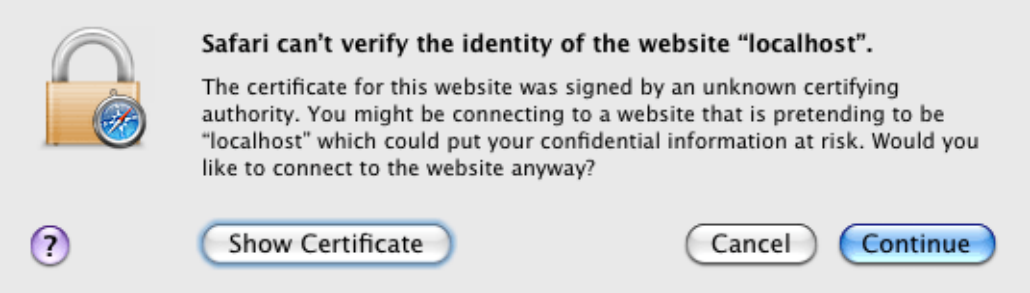


**Figure 9.17** Alert on an untrustworthy certificate

3. The alert dialog contains the *Show certificate* button. Click on it to show the certificate (see figure 9.18).

4. Use the mouse pointer to move the certificate's icon to the desktop, as shown at figure 9.19.

For Mac OS X 10.5 Leopard and higher, follow these instructions:

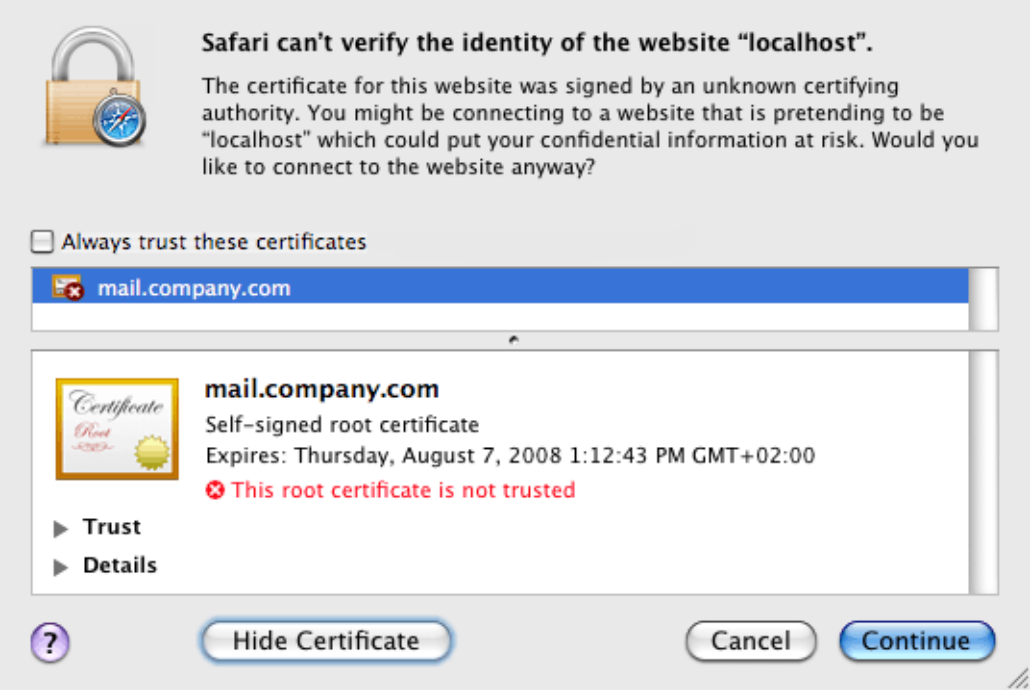


**Figure 9.18** Certificate Details

**Figure 9.19** Moving the certificate to the desktop

1. On the desktop, click on the certificate. In the *Add Certificates* window (see figure 9.20), select the *System* option in the *Keychain* menu (all system users will be allowed to use the certificate) or *Login* (only authenticated users will be allowed to use the certificate). Click OK to confirm changes.

**Figure 9.20** The Add Certificates dialog box

2. The *Keychain Access* application is started, asking for confirmation that you really want to install the certificate. Confirm the dialog by entering username and password for an account with administration rights.

Chapter 10

# Support for Microsoft Outlook for Mac 2011

Since 7.2, *Kerio Connect* supports *Microsoft Outlook for Mac 2011* — users working on Mac OS X can now fully use Outlook features.

Use one of the following configuration methods:

- by using the autoconfig tool
- directly in *Microsoft Outlook for Mac 2011*

> ***Warning:***
> If you do not manage to configure synchronization with *Microsoft Outlook for Mac 2011*, contact your administrator.

The simplest and fastest way to configure *Microsoft Outlook for Mac 2011* is by using the *Kerio Connect Account Assistant* autoconfig wizard. For details, see chapter 8.

To configure *Microsoft Outlook for Mac 2011*, follow these instructions:

## 10.1 Manual Configuration of Microsoft Outlook for Mac

User account for synchronization with *Kerio Connect* can be set directly in *Microsoft Outlook for Mac 2011*.

Follow these instructions to set the account:

1. In the *Tools* menu, select *Accounts*. In the dialog for administration of accounts (see figure 10.1), click on the icon for creation of a new *Exchange Account*.

2. This opens an Exchange account settings dialog (see figure 10.2). Fill in the information as follows:

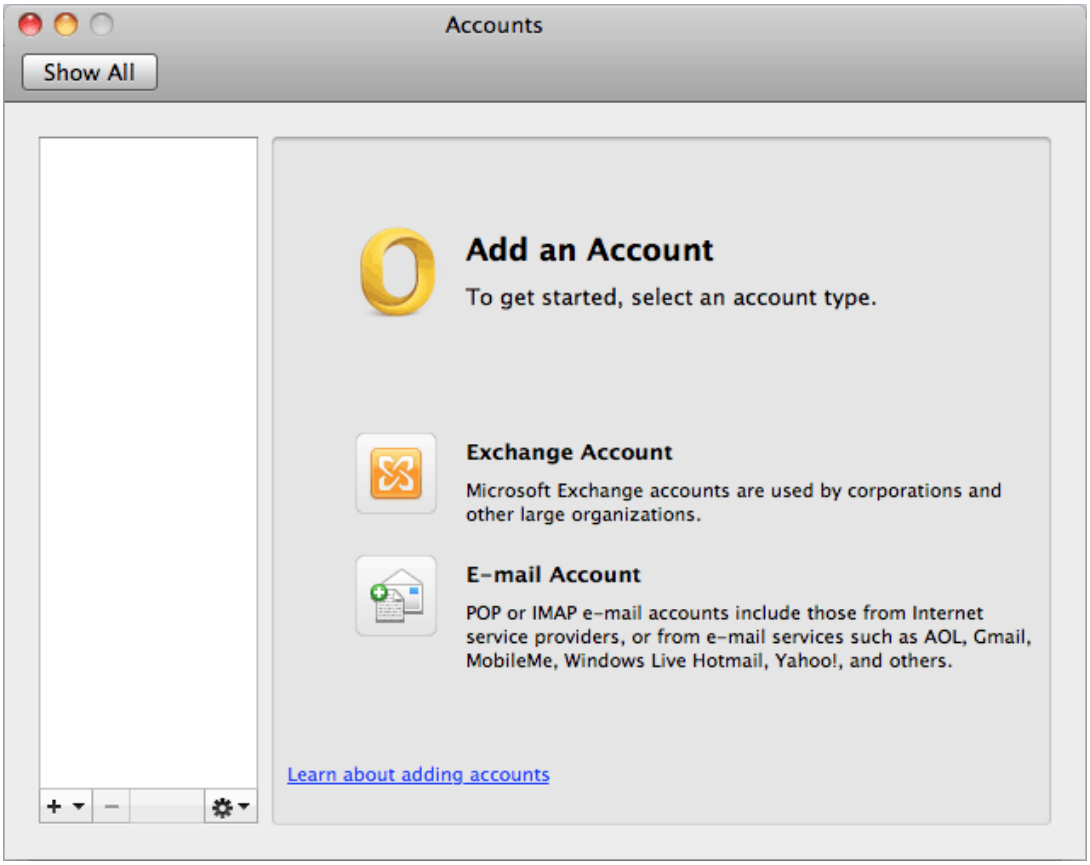


**Figure 10.1** Accounts

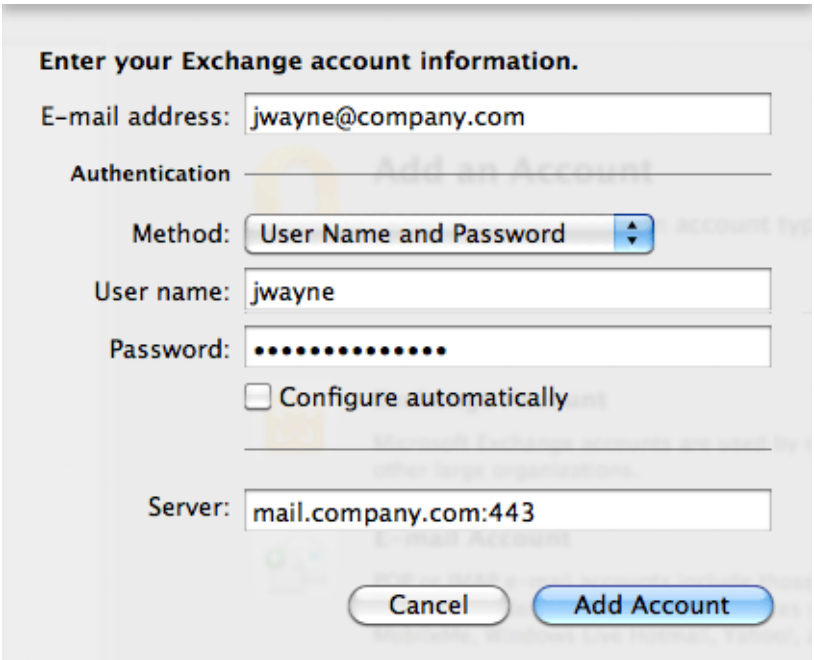


**Figure 10.2** Account settings

**E-mail address**
The email address of the user.

**Authentication method**
Select the *User Name and Password* authentication method.

**User name**
Username used for login to *Kerio Connect*.
If the user account is defined in the primary domain, enter `username` without the at (@) symbol and domain. Otherwise, it is necessary to use pattern `username@domain` (e.g. jsmith@company.com).

**Password**
The password used for accessing your account in *Kerio Connect*.

**Configure automatically**
If this option is enabled, the application attempts to connect automatically.

**Server**
If option *Configure automatically* is disabled, you can enter the address of the email server.

3. Confirm by *Add Account*.

## 10.2 Public folders

Public folders are special type of folders which are shared for reading to all users of the particular domain or of the particular mailserver (it depends on server settings). Public folders help especially share information across the company. For example, company's events are set in the public calendar so that everybody can see when the events happen and view their details, while the person who is responsible for setting of such events can see who is available for the corresponding event. Another advantage of this feature might be for example sharing of public contacts across the company.

If you want content of public folders to be available even when you are not online, follow these instructions:

1. In the window's menu, select *Tools* → *Public Folders*.

2. Select folders you want to access offline. Click on *Subscribe*.

3. Folders will be showed in *Subscribed Public Folders*.

Chapter 11

# Apple iCal Support

*Apple iCal* is an application used for management of *Apple Computer's* calendars running on *Mac OS X*. It enables users to project events included in various calendars to one schedule so that time collisions can be found and solved quickly.

*Kerio Connect* provides support for a wide range of features of the *Apple iCal* application. Supported features are showed in table 11.1.

| Calendar type | Technology | Description |
|---|---|---|
| Calendars located locally | CalDAV | CalDAV account enables to synchronize *Apple iCal* calendars with mailbox in *Kerio Connect*. |
| Calendars located locally | Kerio Sync Connector for Mac | The external utility enables to synchronize *Apple iCal* calendars with mailbox in *Kerio Connect*. |
| Web Calendars | iCalendar (iCal) | Support for iCalendar allows to locate a calendar in *Kerio Connect* or to subscribe a calendar on the server for reading in *Apple iCal*. |

**Table 11.1** Support for Apple iCal

The simplest and fastest way to configure *iCal* is by using the *Kerio Connect Account Assistant* autoconfig wizard. For details, see chapter 8.

To configure *iCal* with *Kerio Sync Connector for Mac* or manually, follow these instructions:

## 11.1 Kerio Sync Connector for Mac

*Kerio Technologies* has developed the *Kerio Sync Connector for Mac* application which allows direct data synchronization with the mailbox in *Kerio Connect*. Since Mac OS X 10.5 Leopard, its functionality is replaced by support for CalDAV.

*Kerio Sync Connector for Mac* and its features are focused in chapter 13.

## 11.2 CalDAV support

Since *Mac OS X 10.5 Leopard*, *Apple iCal* supports the CalDAV protocol. This protocol is also supported by *Kerio Connect*, making it possible to use the protocol for communication between both applications.

Synchronization over CalDAV features the following options:

- synchronization of calendars,
- synchronization of To Do with the Tasks folder in the mailbox,
- scheduling of meetings,
- resource scheduling,
- delegating folders,
- providing information regarding availability of *Kerio Connect* users,
- setting of private events in calendars (featured on *Apple iCal 3.0.3* and higher).

If you use Mac OS X 10.5 Leopard and you have so far used the *Kerio Sync Connector* for synchronization of calendars, it is recommended to disable synchronization of calendars and set connection to CalDAV server, because this option provides also the option of meeting planning and delegation of calendars to other users.

***Warning:***
If you have installed and configured *Kerio Sync Connector*, synchronization of calendars over *Kerio Sync Connector* is stopped automatically upon setting a CalDAV account. This does not affect synchronization of contacts.

### 11.2.1 Automatic configuration

*Kerio Technologies* have developed a tool for automatic configuration of CalDAV accounts in *Apple iCal*. This implies that now you simply download and run this tool on your computer. The only information required for the installation is as follows:

- username and password for the corresponding account,
- username and password for an account with administration rights for the workstation.

### *Launching iCal Config Tool*

1. The tool can be downloaded from the special page *Integration with Mac OS X*. To open this page, go to the *Kerio WebMail* interface's *Settings→ Integration with Mac OS X* (see figure 11.1).

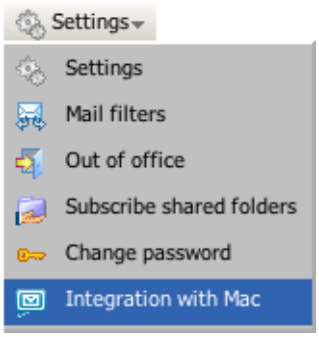


**Figure 11.1** Kerio WebMail — Settings

*Note:*
For detailed instructions on authentication to *Kerio WebMail*, refer to chapter 1.2.

2. On the *Integration with Mac OS X* page just opened (see figure 11.2), click on the *Auto-configure iCal* link.

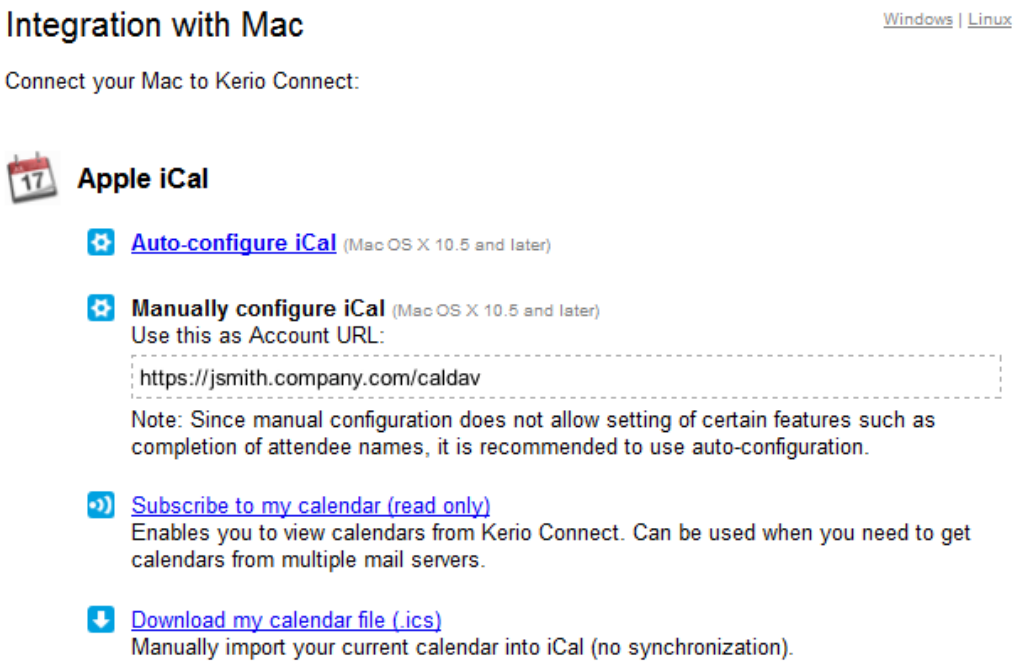


**Figure 11.2** Integration with Mac OS X

3. The tool gets downloaded to your workstation and gets launched automatically (see figure 11.3). Click on *Continue*.

**Figure 11.3** Launching iCal Config Tool

4. In the next page, select location where the tool will be saved and where it will be launched from.

   Unless motivated by specific reasons, do not change the default settings and click on *Install*.

5. Now enter username and password of an administration account for your computer (see figure 11.4).

6. Then specify login username and password for connection to a *Kerio Connect* account.

7. Once the wizard is completed, the CalDAV account in *Apple iCal* is ready for use.

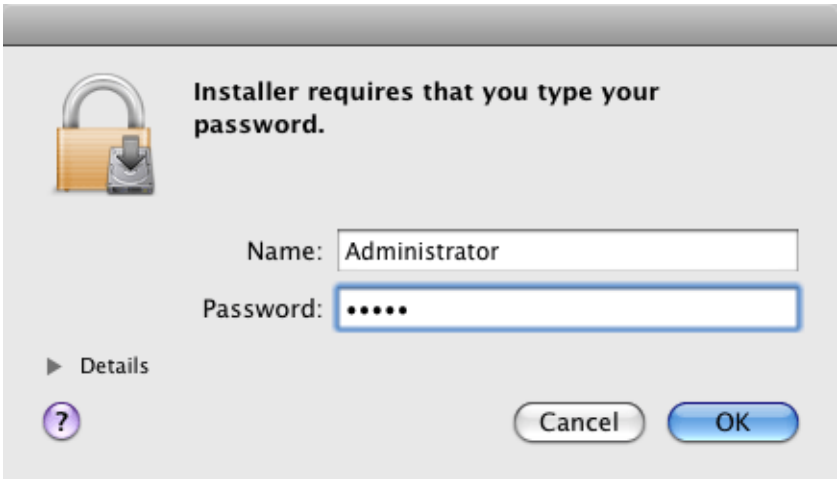


**Figure 11.4** Entering administration username and password

### 11.2.2 Manual configuration

Unless motivated by special reasons for manual settings, perform the configuration by using the *iCal Config Tool* described in section 11.2.1.

To set a CalDAV account in *Apple iCal*, follow these guidelines:

1. Run *Apple iCal*.
2. In the menu, select *iCal* → *Preferences* and go to the *Accounts* tab.
3. Click on the + button to create a new account.
4. In the dialog opened, enter your username following the pattern `username@domain` (e.g. `gbush@company.com`) and password. If the account belongs to the primary domain, login by username without domain is sufficient. You can also define description of the account.
5. Click on *Server Options* and specify server name following either the pattern `http://server_name/caldav` or `https://server_name/caldav` (see figure 11.6). It is recommended to go for the `https` option which provides more secure connection between the server and the client. To make HTTPS work, you must install a SSL certificate on your computer (the guidelines are available in chapter 9.9).

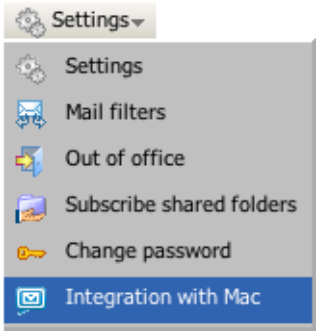


**Figure 11.5** Kerio WebMail — Settings

The full URL is also available at the page *Integration with Mac OSX*. To open this page, go to the *Kerio WebMail* interface's *Settings→ Integration with Mac OS X* (see figure 11.5). For detailed instructions on authentication to *Kerio WebMail*, refer to chapter 1.2.

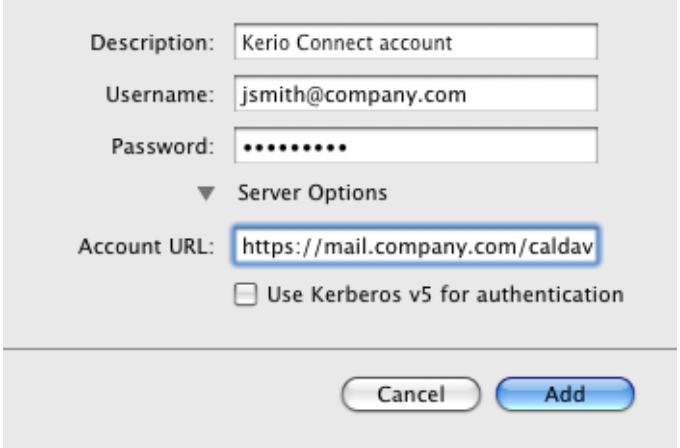


**Figure 11.6** CalDAV account settings — Preferences

***Warning:***
It is not recommended to enable the *Use Kerberos v5 for authentication* option, since *Kerio Connect* does not support this authentication method.

If the account is set correctly, *Apple iCal* and the mailbox get synchronized.

Now you can set intervals for automatic synchronization:

1. In *iCal → Preferences*, go to the *Accounts* tab.
2. On the *Account Information* tab, select an update interval from the *Refresh calendars* menu. The interval should be selected with respect to speed of your internet connection as well as on update frequency needed.

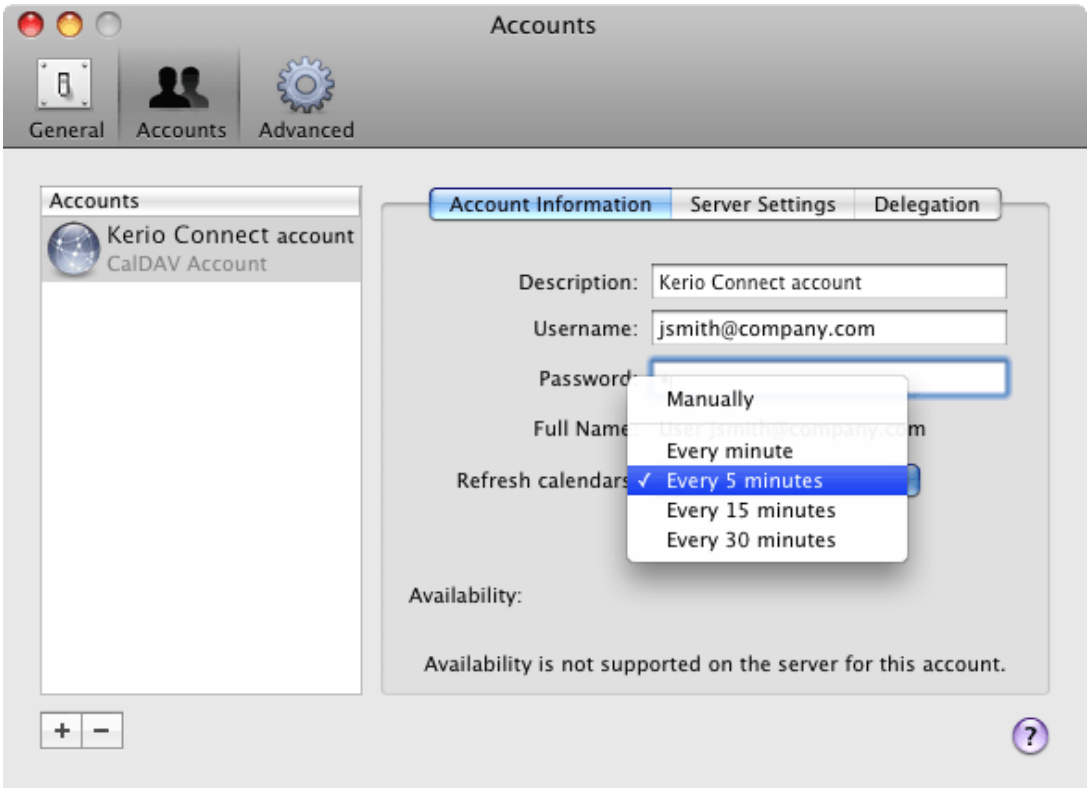


**Figure 11.7** CalDAV account settings — Preferences

### 11.2.3 Synchronization

Once a CalDAV account is set, the window with calendars contains also a new tab where all calendars of the *Kerio Connect* account created right in the root folder are shown (for details, see section 1.12.1). Subfolders cannot be synchronized.

In *Apple iCal*, new calendars can be created either in personal calendars (but such calendars will not be synchronized) or in the CalDAV account where every calendar is saved also on the server. All such calendars will be available in the *Kerio WebMail* interface or in any other email client supporting calendars.

The same rules are applied vice versa. If a new calendar is created in your email client and located as a root folder's subfolder (for information about root folders see section 1.12.1), its copy is created also in *Apple iCal* and it will be synchronized using the parameters set in the configuration.

Apart from, calendars, also To Do items created in synchronized calendars will be included in the synchronization. All To Do items will be synchronized with the default *Tasks* folder.

Tasks in the *Tasks* folder created for example in *Kerio WebMail* will be synchronized into the *Calendar* folder in *Apple iCal*.

#### *Public calendars*

Public calendars must be subscribed by their delegation. Instructions to be followed can be found in section 11.2.7.

### 11.2.4 Appointments

Meetings are special calendar events where email addresses of other participants can be involved. Once a meeting is created, addresses can be added to which the message will be sent — these special messages are called invitations. Invitations are special messages informing users of topics, times and place of a meeting. Invitations include special accept/reject buttons. Information derived from the participant's reaction is sent to the meeting initiator (chair member). The initiator thus know whether the persons invited come or not. It is also possible to send updates related to meetings when the initiator modifies the invitation.

#### *New meeting*

Meetings are created as events:

1. Double-click on a calendar and create an event.
2. Double-click on the event and click on *Edit* in the dialog just opened.
3. This opens an event's edit window where advanced settings can be done.
4. Use the *attendees* option to specify email addresses of invited users (see figure 11.8).
5. Once addresses are specified in the *attendees* textfield, the *Available Meeting Times* link appears. Clicking the link opens the *Availability* window where free and busy times of each attendee are shown on individual timelines so you can choose the best time for the meeting. The timeline shows times for which the attendees already have scheduled any events in their calendars saved on the server (for details, see figure 11.9).

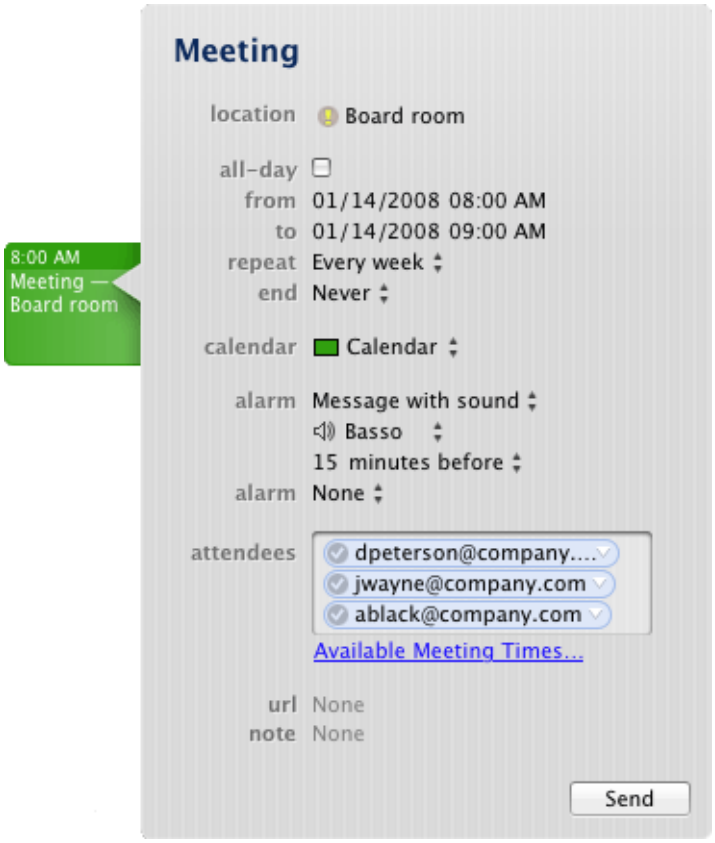


**Figure 11.8** Meeting settings

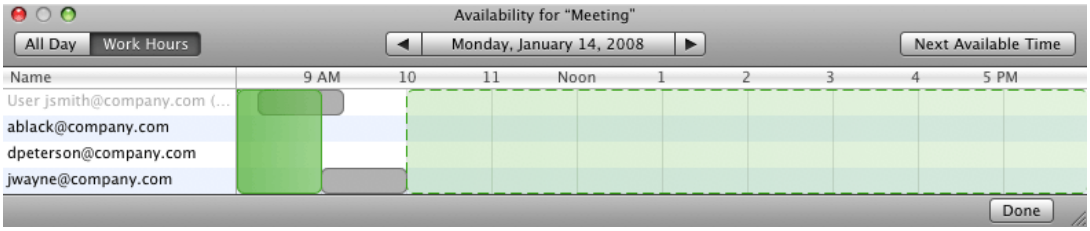


**Figure 11.9** Viewing Free/Busy information of the meeting attendees

6. Use the *Send* button to send the invitation.

Once the invitation is delivered, the attendees may either accept or reject the meeting. In the meeting edit window the organizer can see the attendees' decisions (see figure 11.10).

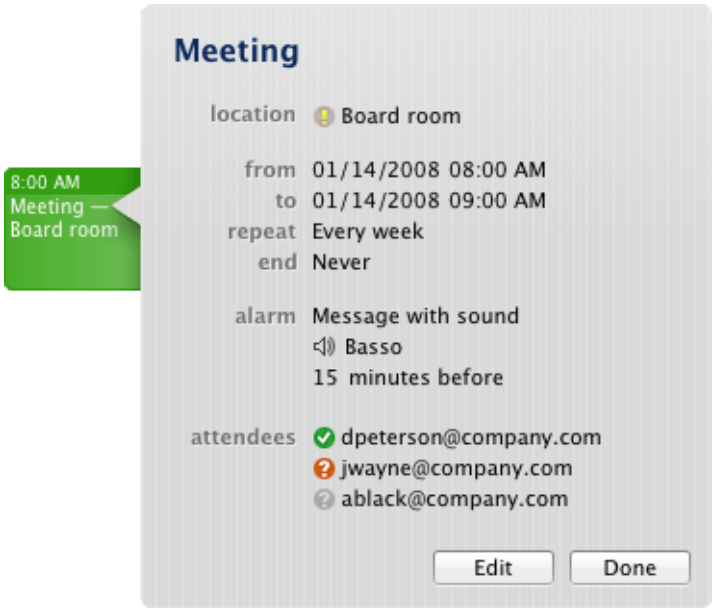


**Figure 11.10** Meeting acceptation/rejection

### *Meeting acceptation*

If an invitation is delivered to *Apple Mail*, open an attachment with the `.ics` extension and save the invitation in *Apple iCal*. Unconfirmed invitation is displayed with dashed frame in the calendar. Now double-click on the invitation and either accept it by the *Accept* button or reject it by clicking on *Decline* (see figure 11.11).

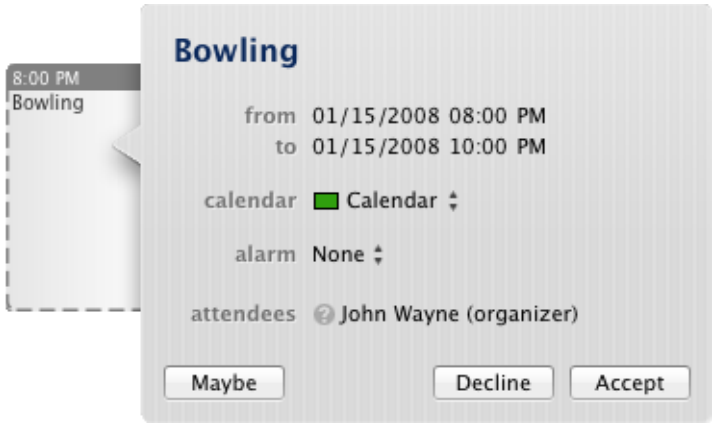


**Figure 11.11** Meeting acceptation/rejection

Your response will be shown in the meeting's *attendees* section (see figure 11.10).

## 11.2.5 Resources

*Kerio Connect* now provides an electronic management of resources shared by employees of your company. Resources are rooms and devices available in the company, such as OHPs,

whiteboards, cars, etc. Resource management allows to:

- book a resource for a particular time,
- view current resources and their reservations in the Free/Busy calendar (for details on Free/Busy calendars and information on appointments, see section 11.2.4) when planning reservations,
- subscribe resource calendars by using standard sharing/delegation,
- set the resource manager who can decide on priorities in case of any collisions in reservations.

Resources can be booked by using the existing calendar system. Resource reservation is based on creating of en event. The feature works similarly as appointment scheduling. The main difference is that the *Attendees* tab must include the resource selected from the contact list (it can naturally also include contacts of attendees). In the *Free/Busy* calendar you can see whether the resource is available for the scheduled time or not.

*Note:*
To make a resource available for booking, it is necessary to create it in *Kerio Connect* first. If you need to create a new resource, contact your network administrator.

### *Resource scheduling*

To book a resource, follow these instructions:

1. Open a new event, enter its subject and time for which the resource should be reserved.
2. Add the resource(s) email address to *attendees* entry (e.g. `car1@company.com`).
3. Click on the *Available Meeting Times* link.
4. If the Free/Busy calendar is working correctly, existing reservations of the involved resource(s) are showed. It is therefore easy to check right away, whether the source is free or already booked by another user for the suggested time (see figure 11.12).

You may have noticed that there are also other attendees in the list shown in figure 11.12. Resources can be reserved either for usual appointment or for meetings (see section 11.2.4).

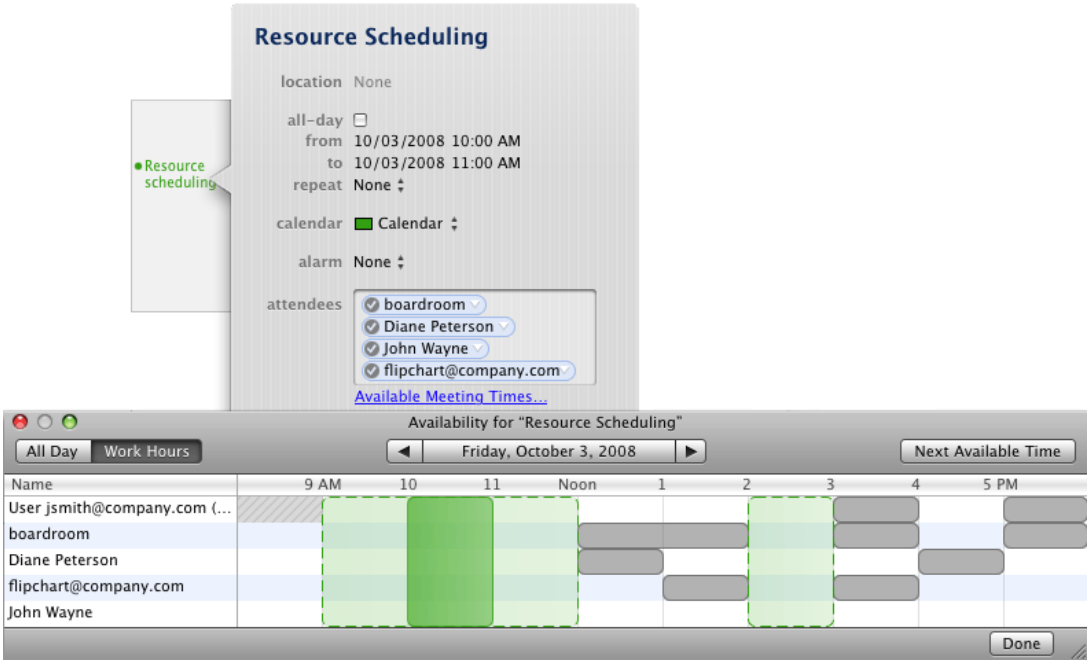


**Figure 11.12** Resource reservation

### *Resource calendars*

Each resource created in the system has its own calendar where all reservations are displayed. Calendars of individual resources can be subscribed through the standard delegation process (delegation of folders is focused in chapter 11.2.7).

Most user can access resource calendars in the read-only mode. Resource calendars can be edited only by the resource manager. The role of resource managers and their rights are addressed in the following section.

### *Reservation management*

In certain situations, it is necessary that a resource is booked even if it has already been reserved or that there is no other way than to make the reservation by a phone call. For such purposes, there exists a user with special rights who is a manager of the company resources. Resource managers can access resource calendars with administration rights. This implies that they can edit, remove or move reservations in the particular resource calendar. They can also create new reservations.

If you are a resource manager, first it is necessary to subscribe calendars of all resources that you would manage:

1. Open the account settings (the *Accounts* tab in *iCal* → *Preferences*).

2. Go to the *General* tab (see figure 11.13).

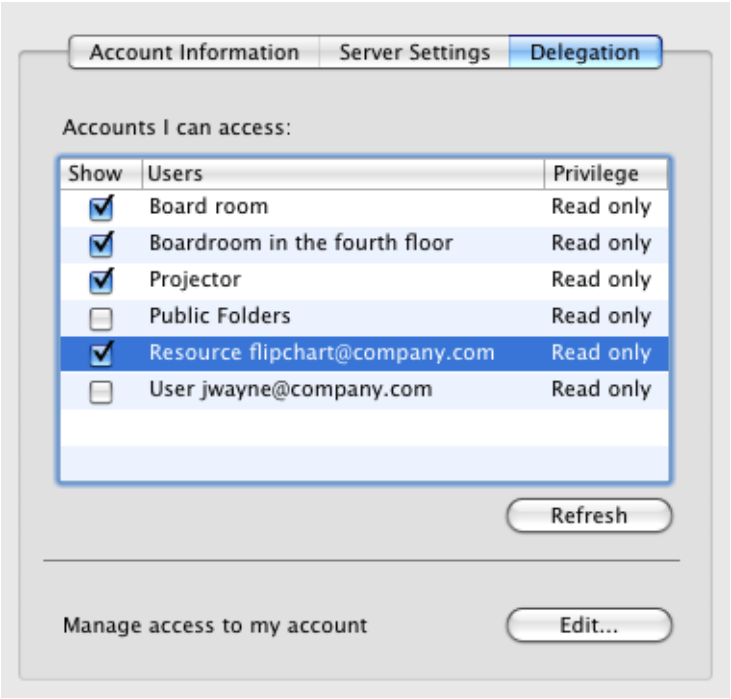


**Figure 11.13** Context pop-up menu of the root folder

3. In the list of delegated folders, check all resources that you will manage. Delegated calendars then appear in *Apple iCal* immediately.

### 11.2.6 Availability

Availability in *Apple iCal* is a calendar feature which allows extended setting of Free/Busy calendars (details on Free/Busy calendars are provided for example in section 9.3). These advanced settings address working hours of employees. Simply said, availability makes it possible for appointment setters to check in which hours you are available at work.

#### *Availability settings*

To set availability in *Apple iCal*, follow these simple guidelines:

1. Go to *iCal* → *Preferences*.

2. On the *Account Information* tab, you can find the *Availability* item (see figure 11.14) where you can execute desirable settings.

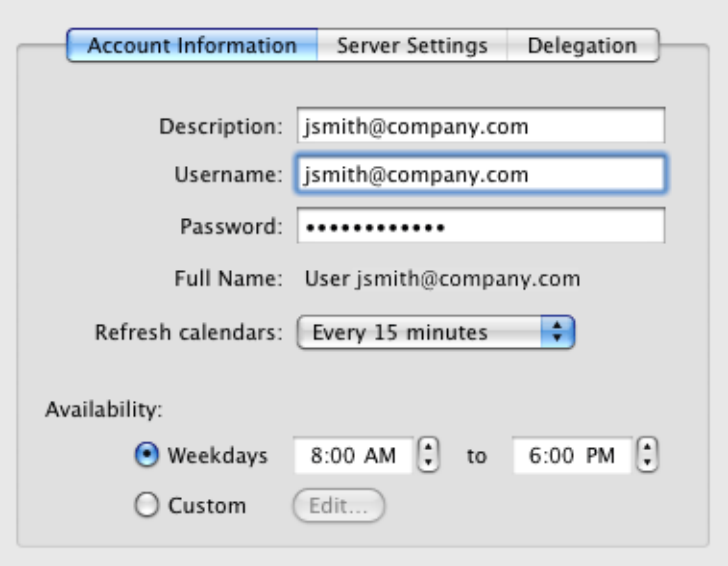


**Figure 11.14** Checking availability in Apple iCal

### 11.2.7 Delegation of calendars

CalDAV account in *Apple iCal* allows delegation of calendars located in *Kerio Connect*.

Delegation makes it possible for other users to access your calendar or for you to access and possibly also work with calendars of other users.

#### *Subscription of delegated calendars*

If someone delegates a calendar for you, you will need to subscribe it.

1. Open the account settings (the *Accounts* tab in *iCal* → *Preferences*).
2. Go to the *Delegation* tab (see figure 11.15).
3. If the calendar was delegated correctly, the list includes the delegator's username. Now simply check the *Show* field to view the delegated calendar in *Apple iCal*.

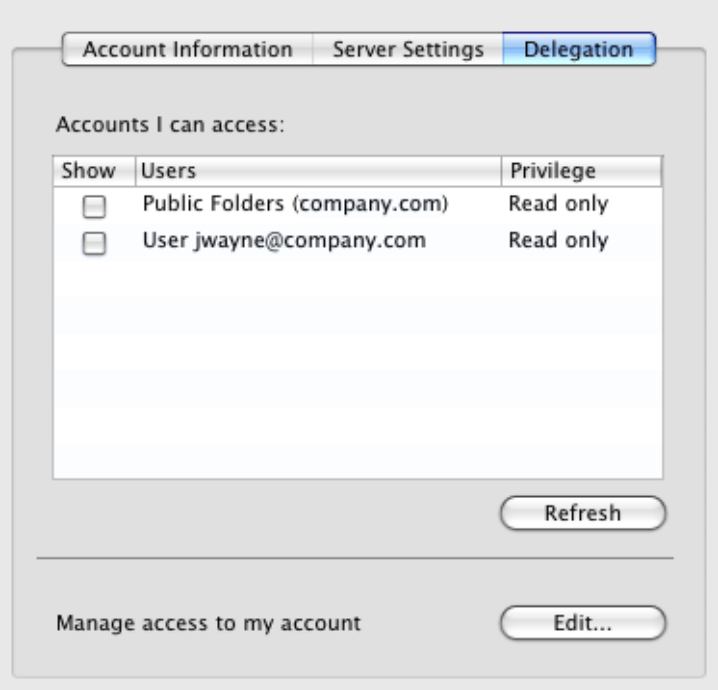


**Figure 11.15** Subscription of delegated calendars

### *Delegation settings*

It is possible to delegate only the entire CalDAV including all calendars it contains. To delegate it, follow these instructions:

1. Open the account settings (the *Accounts* tab in *iCal* → *Preferences*).

2. Go to the *Delegation* tab (see figure 11.16).

3. In the *Manage access to my account* section of the dialog, click on *Edit*.

4. In the list, enter username of the user to whom you want to delegate the calendar (see figure 11.16). After having typed a few starting letters, names should be offered automatically from the list.

5. Users can be assigned rights either for reading only or also for writing. Read rights are assigned automatically upon addition of the particular user to the list. To assign user with writing rights, check the *Allow Write* option.

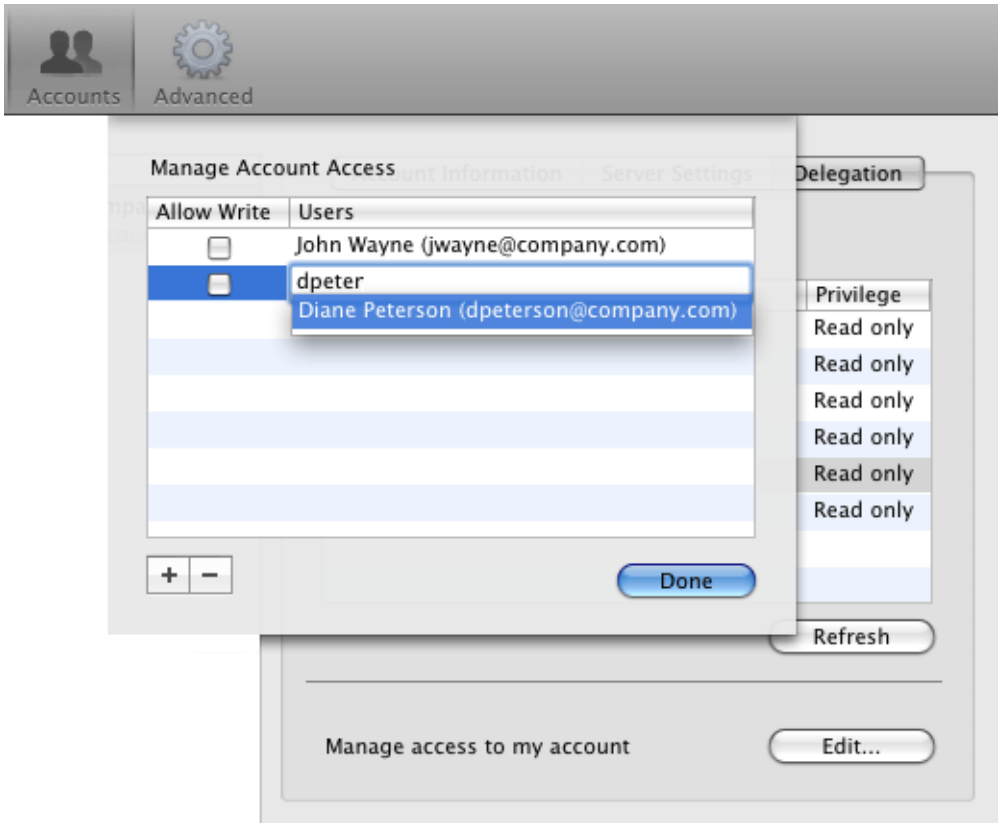


**Figure 11.16** Delegation of calendars

### *Setting delegation in the Kerio WebMail interface*

To delegate calendar to a user who wants to subscribe it in *Apple iCal*, you can use standard sharing procedure for example in the *Kerio WebMail* interface. However, access rights for sharing are not identical with delegation rights. Below you will find guidelines for such cases:

Calendars shared in *Kerio WebMail* allow the following access rights levels:

- Read rights — user can view the calendar.
- Write rights — user can view the calendar as well as edit it, the only action denied is removal of the calendar.
- Full rights (administration) — user can view, edit and even remove the calendar.

*Apple iCal* distinguishes between the following access rights levels:

- for reading only,
- full rights (administration).

As suggested above, delegated calendars with write rights will be understood by *Apple iCal* as calendars with full rights access. However, users with these rights is not allowed to remove the calendar.

For these reasons it is recommended to set either read or full access rights to your calendars in *Kerio WebMail*.

> ***Warning:***
> Access rights apply to the entire account of the delegating user. If any user delegates more than one calendar, the lowest access level is set for all these calendars. This implies that if there is at least one calendar delegated with read rights, all delegated calendars will be available for reading only.

### 11.2.8 Private events

Events are private when they are set as *Private*. This feature secures event details of calendars delegated to another user from being viewed by this user. The users with whom the particular event is shared cannot view its content, edit it or remove it. Such users will see only the item labeled as *Private event*. The only information these users learn from the calendar is date and time.

*Note:*
In the *Free/Busy* calendar, the level of busyness and the time of private events are available.

Private events can be created as follows:

1. Open the event edit box.
2. Insert relevant information.
3. Check *Private* (as shown in figure 11.17).

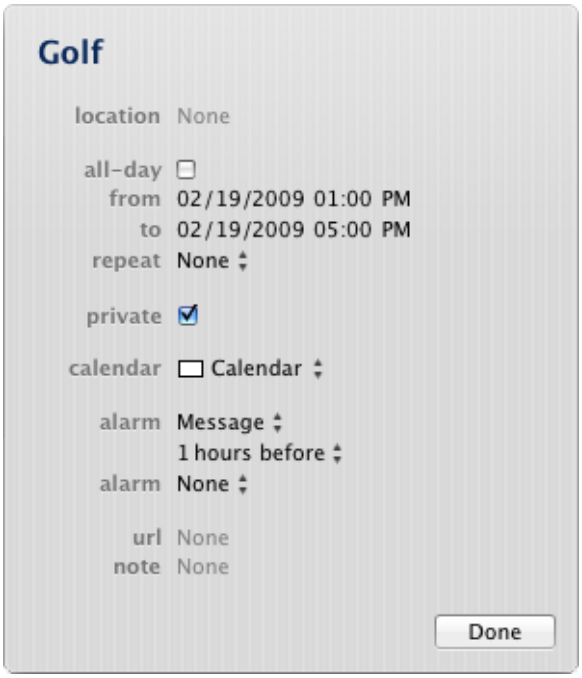


**Figure 11.17** Event edit box

4. Save changes by using the *Done* button.

> ***Warning:***
> Private events are treated as private only if the client where the private event calendar is viewed supports this feature. In other client applications, it is possible to view and edit events without any restrictions by users with appropriate access rights. This implies that information included in private events are not well secured.

## 11.3 Support for the iCal standard

*Kerio Connect* supports publishing of calendars in user email accounts on the server and subscription of calendars stored in the mailbox from the *Apple iCal*. In addition to subscription to their own calendars, users can also subscribe to calendars shared by other users. This implies that if you share your calendar with your teammate, she can subscribe it and view it. Subscribed calendars cannot be edited by the subscribers, only viewed.

As mentioned earlier in this document, in *Apple iCal*, subscribed calendars are available only in the read-only mode. Published calendars are available on the server for reading only (this implies that it is not edit published calendars when accessed by *Kerio WebMail*, for example).

If calendars are published as subfolders of the default *Calendar* folder (the main calendar), all events will be also shown in the *Free/Busy* calendar (for details on *Free/Busy* calendars, see section 9.3).

### *Subscription to calendars*

It is possible to subscribe any calendar stored on the WebDAV server in the iCal format. This implies that it is possible to subscribe to calendars stored in *Kerio Connect* and/or iCal calendars stored on any other server supporting the WebDAV protocol and the iCalendar format.

To subscribe your own *Kerio Connect's* calendar in *Apple iCal*, follow these guidelines:

1. Log in the *Kerio WebMail* interface.

   > ***Warning:***
   > It is necessary to connect via HTTP (not HTTPS), otherwise, the link will not be displayed correctly.

2. Go to *Settings* → *Integration with Mac OS X*.

3. On the *Integration with Mac OS X* page, in section *Apple iCal*, click on the *Subscribe to my calendar* link.

4. This opens *Apple iCal* where you just confirm the calendar offered for download.

Calendars can be subscribed through the *Calendar* → *Subscribe* menu. This option opens a dialog (see figure 11.18) where URL address can be specified and detailed authentication and refreshing parameters can be set (the entire calendar is downloaded for each refresh).

The address must follow this pattern:

`http://server_name/ical[path]`

To subscribe the default calendar folder which belongs to your mailbox in *Kerio Connect*, enter the URL in the following format:

`http://server_name/ical`

It is also possible to subscribe another user's calendar, if the user shares it for you. For the login URL, use the following pattern:

`http://server_name/ical/user@domain`

or

`http://server_name/ical/domain/user_name`

It is also possible to subscribe another user's calendar, if shared. The following URL format must be used:.

`http://server_name/ical/public`

or

`http://server_name/ical/public/Calendar`

When a calendar is being subscribed, it is possible to edit name of the folder. If no name is entered, the `Calendar` folder will be used automatically.

***Warning:***
It is not possible to subscribe calendars via SSL connection. Therefore, use only the non-secured HTTP version for this purpose. This means that URLs of calendars must not start with `https://`.

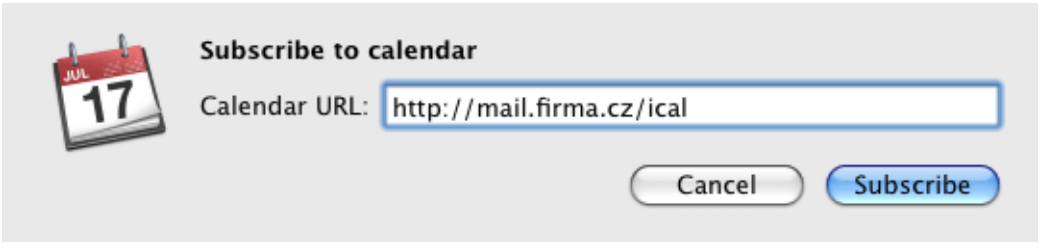


**Figure 11.18** URL calendar definition

When the URL is specified, the application attempts to connect to the server. If authentication is required, the dialog where username and password can be specified is opened (i.e. typically the username and password used for connection to your email account).

Once connected to *Kerio Connect*, a dialog where other details can be specified is opened (see figure 11.19):

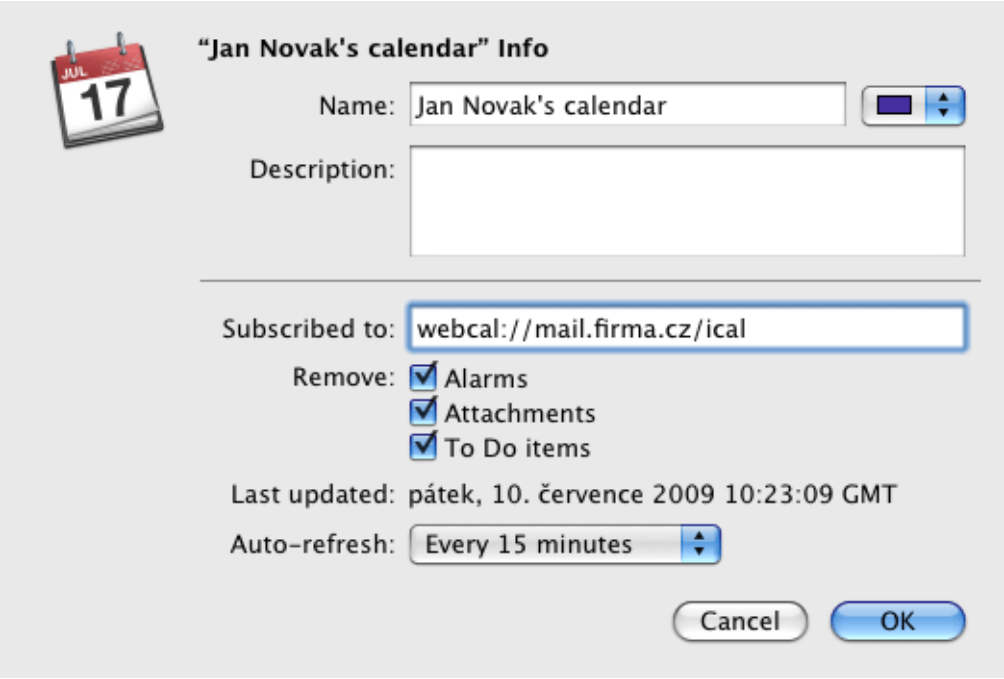


**Figure 11.19** Setting details

**Name**
Any name used for the calendar in *Apple iCal*. On the right, you can select a color used for items of this calendar.

**Description**
Any description of the calendar.

**Subscribed to**
URL of the calendar.

**Remove**
Here you can select items to be removed from the subscribed calendar: "reminders", "attachments" and/or "tasks". It is recommended to enable the "reminders" removal option (pop-up windows reminding of events) since the calendar is available in the read-only mode and these items cannot be disabled or moved for later. Only the calendar's owner is allowed to manipulate with them. "Attachments" and "tasks" are not supported in *Kerio Mail Server*.

**Auto-refresh**

The calendar will be refreshed in the interval set. Unless the user has a fast Internet connection, it is not recommended to set the interval too short (calendar is completely reloaded upon each refresh).

### *Calendar publishing*

Calendars can be published to the following stores:

- to a personal account in *Kerio Connect*,
- to an account of another *Kerio Connect* user (username and password are required unless the user creates a new calendar folder and shares it),
- to any WebDAV server in the Internet.

When published, the calendars will be available at the server for reading only. This implies that it is not possible to edit, add or remove events.

Calendars can be published through the *Calendar* → *Publish* menu. This opens a dialog (see figure 11.20), where URL address can be specified and other publishing parameters can be set. It is also possible to set that the calendar is re-published upon each change (the entire calendar is always published, not just changes).

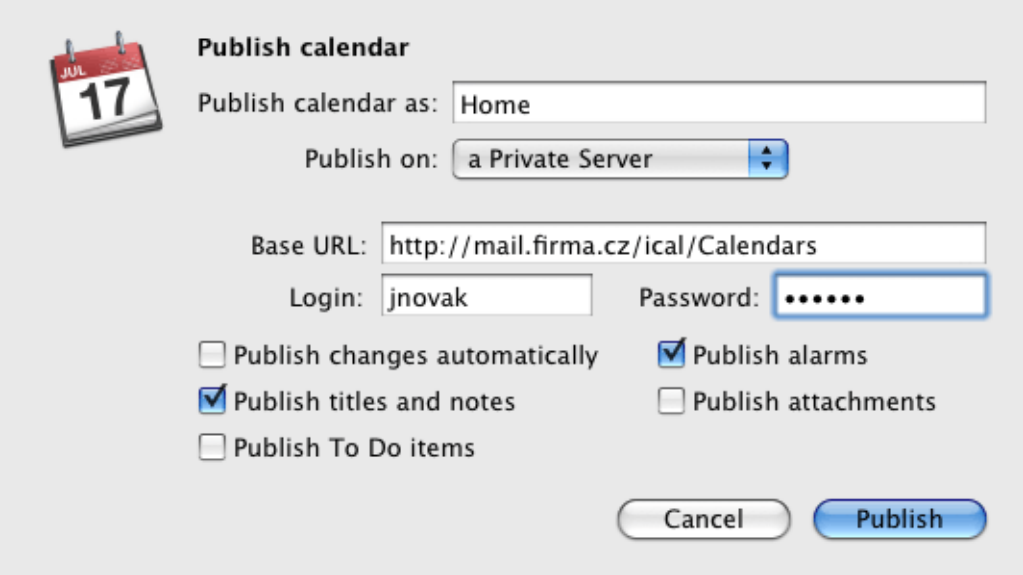


**Figure 11.20** The Publish Calendar dialog

**Publish calendar as**

By default, the entry includes the name used by this calendar in *Apple iCal*. The title can be edited.

**Publish on**

In the menu, set the *a Private Server* option.

**Base URL**

URL address of the server where the calendar would be published. The URL address must follow this pattern:

`http://server_name/ical[path]`

To publish a calendar in the root folder (of a particular mailbox), enter URL in the following format:

`http://server_name/ical`

To publish acalendar in the `calendar` folder (of your mailbox), enter URL in the following format:

`http://server_name/ical/calendar`

To publish a calendar to the mailbox of another *Kerio Connect* user, enter URL in the following format:

`http://server_name/ical/user@domain/folder_name`

It is also possible to publish a public calendar. The following URL format must be used:.

`http://server_name/ical/public/folder_name`

Make sure that URL address does not include forbidden characters and symbols. This involves spaces between words. The special %20 character must be used instead of spaces. Here is an example:

`http://mail.company.com/ical/private%20calendar`

The other forbidden characters and symbols can also be replaced by corresponding equivalents. These equivalents are represented by hexadecimal ASCII codes of the particular characters preceded by the % symbol.
Besides forbidden symbols, there are other characters that must be encoded. This includes any national diacritical characters, “?”, “:”, etc. It is also necessary to replace these characters in URL by their hexadecimal alternatives.
*Note:*
In *Kerio Connect*, standard folders (Inbox, Junk E-mail, Sent, Calendar, Tasks) are saved under their English names. Therefore, use the Calendar name to publish an iCal calendar to a default folder:

`http://mail.company.com/ical/Calendar`

**Login, Password**
Name and password used for authentication at the server where the calendar will be published. In this case, specify username and password for the corresponding *Kerio Connect* user account.

**Publish changes automatically**
This option enables/disables automatic update of the published calendar. The whole calendar is published within each update.

**Publish titles and notes**
If it is desirable that events' subjects and bodies are displayed on the server, enable this option.

**Publish To Do items**
This data will not be displayed in *Kerio Connect*.

**Publish alarms**
Alarms will be published with the calendar.
It is recommended not to publish alarms since users who subscribe it can only read it and are not allowed to close them.

**Publish attachments**
Attachments are not supported in *Kerio Mail Server*.

### *Sharing of calendars*

Calendars published in *Kerio Connect* can be shared with other users who can subscribe them for their *Apple iCal* or view them in *Kerio WebMail*.

To share an iCal calendar, follow these instructions:

1. Log in the *Kerio WebMail* interface.
2. Create a special calendar folder (e.g. `Shared_Calendar`). Creating of new folders in *Kerio WebMail* is addressed in chapter 1.12.5.
3. Share the folder with corresponding users.
4. Publish an *Apple iCal* calendar to the folder just created. The URL for publishing will be as follows:

   `http://server_name/ical/Shared_Calendar`

***Warning:***
It is always necessary to share the entire folder in which the iCal calendar is published. If only the calendar itself is published, the sharing will be removed upon next update (publishing of a new version). This is caused by the fact that iCal calendars are recorded on the servers in the way that the original version of the calendar is removed first (including possible sharing) and then a new version is saved to the server.

Chapter 12

# Apple Address Book Support

*Kerio Connect* supports *Apple Address Book*, the standard directory of Mac OS X. This support includes the option of searching for contacts in the *Kerio Connect's* LDAP database and, since Mac OS X 10.3, also of bi-directional synchronization of contacts with *Kerio Connect's* user accounts .

*Kerio Connect* supports *Apple Address Book* for the following versions:

- *Mac OS X 10.5 Leopard* — supports LDAP and mutual synchronization with *Kerio Sync Connector for Mac*.
- *Mac OS X 10.6 Snow Leopard* — supports LDAP and mutual synchronization with *Kerio Sync Connector for Mac*.
- *Mac OS X 10.7 Lion* — supports LDAP, CardDAV protocol and mutual synchronization with *Kerio Sync Connector for Mac*.

The simplest and fastest way to configure *Apple Address Book* is by using the *Kerio Connect Account Assistant* autoconfig wizard. For details, see chapter 8.

To configure *iCal* account with *Kerio Sync Connector for Mac* or manually, follow these instructions (settings and options differ in various versions of the application and will therefore be described separately):

## 12.1 LDAP searching settings

### 12.1.1 Mac OS X 10.2 Jaguar

In this version, *Kerio Connect* supports search in the *Kerio Connect* LDAP database. The option of search in LDAP database allows automatic check for email addresses during message composition in *Apple Mail*. All addresses included in the LDAP database (addresses of all *Kerio Connect* accounts) are checked.

*Apple Address Book* parameters can be set under *Address Book Preferences*:

1. Switch to the LDAP tab
2. Specify the *Server* item with the DNS name or the IP address of the host where *Kerio Connect* is running and the LDAP port for the server.

SSL-secured LDAP can be used for the traffic. However, in such a case it is necessary to authenticate by a trustworthy certificate (for details, refer to chapter 9.9). *Apple Address Book*

connects to *Kerio Connect* by encrypted connection using the LDAP Start TLS extension. It is necessary to follow these steps when setting the encrypted communication on the *Address Book* → *Preferences* → *LDAP* tab:

1. enable the *Use SSL* option,

2. change the default port 636 to the port used in *Kerio Connect* for the non-secured LDAP service (typically port 389). In case that you want to use SSL-secured connection to the server (*Use SSL*), a trustworthy certificate installed is required.

***Warning:***
In this version, searching is available only for public contact folders with anonymous read access (the "anyone" user).

### 12.1.2 Mac OS X 10.5 Leopard and higher

Search in the *Kerio Connect's* LDAP database allows automatic check for email addresses during message composition in *Apple Mail*. All addresses included in the LDAP database (addresses of all *Kerio Connect* accounts) are checked.

*Apple Address Book* parameters can be set under *Address Book* → *Preferences*. This opens the dialog divided to several tabs. Specification of the LDAP tab is required (see figure 12.1).

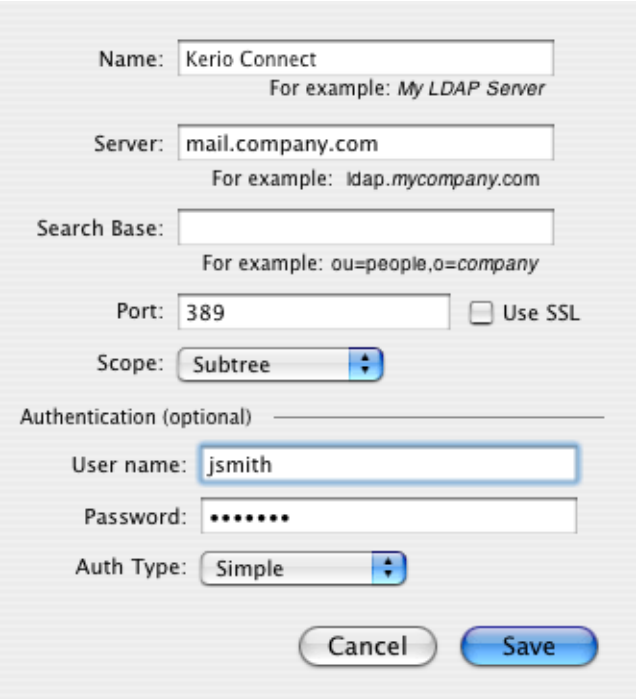


**Figure 12.1** Apple Address Book settings

**Name**

Name of *Kerio Connect* is required in this entry.

**Server**

IP address or DNS name of the server where *Kerio Connect* is running.

**Search Base**

Specify a location of contacts in the LDAP database (see above). If the entry is not specified, all subscribed contact folders will be searched through.
If you want to access all private and subscribed shared and public folders, leave the entry blank or enter this string:

```
fn=ContactRoot
```

More precise specification of searched section of the LDAP database enables to access only some types of contacts. To better understand various alternatives, read the following examples:

- `cn=wsmith@company.com,fn=ContactRoot`
  (the look-up will be performed only in folders of the `jsmith@company.com` user)
- `fn=personal,fn=ContactRoot` (only folders of the user currently connected to the LDAP server will be searched through. This option is identical with the previous one, however, it is not necessary to specify username (or email address) of the user. This option may be helpful for example when configuring multiple clients, etc.)
- `fn=public,fn=ContactRoot`
  (only public contact folders will be searched through)
- `fn=Contacts,cn=wsmith@company.com,fn=ContactRoot`
  (only the `Contacts` folder of the `jsmith@company.com` user will be searched through)
- `fn=Public Folders,fn=public,fn=ContactRoot`
  (only the public `PublicContacts` folder will be searched through)

**Port**

Port of the LDAP service. The same port as in *Kerio Connect* must be set.
If you want to use the encrypted connection to the server (*Use SSL*), it is necessary that a trustworthy certificate is set (for details, see chapter 9.9).
*Apple Address Book* connects to *Kerio Connect* by encrypted connection using the LDAP Start TLS extension. It is necessary to follow these steps when setting the encrypted communication:

1. enable the *Use SSL* option,
2. change the default port 636 to the port used in *Kerio Connect* for the non-secured LDAP service (typically port 389). In case that you want to use SSL-secured connection to the server (Use SSL), a trustworthy certificate installed is required.

**Scope**

This item defines which folders will be searched through. It is recommended to use the *Subtree* option where the system searches through all contact folders and subfolders.

**Authentication**

Authentication to *Kerio Connect*. Set the *Simple* option for the authentication type to make it possible to specify username and password to the corresponding user account.

## 12.2 Synchronization of contacts

Synchronization settings differ for individual versions of *Mac OS X*:

### 12.2.1 Mac OS X 10.5 Leopard

For *Mac OS X 10.5 Leopard*, two methods of synchronization are possible:

- For the synchronization settings, the built-in support for connection to the *Microsoft Exchange* server will be used and the synchronization is performed with the *Apple iSync* application.
- Synchronization can be set by the *Kerio Sync Connector*, a special application designed for data synchronization in *Apple Address Book* and *Apple iCal*. In detail, *Kerio Sync Connector* is described in chapter 13.

***Warning:***
It is not possible to set synchronization both in *Apple Address Book* and in the *Kerio Sync Connector*. Only one synchronization method can be used at a time.

Synchronization in *Apple Address Book* can be set as follows:

1. Run *Address Book*.
2. In *Address Book* → *Preferences* (see figure 12.2) on the *General* tab, check the *Synchronize with Exchange* option (figure 12.3).

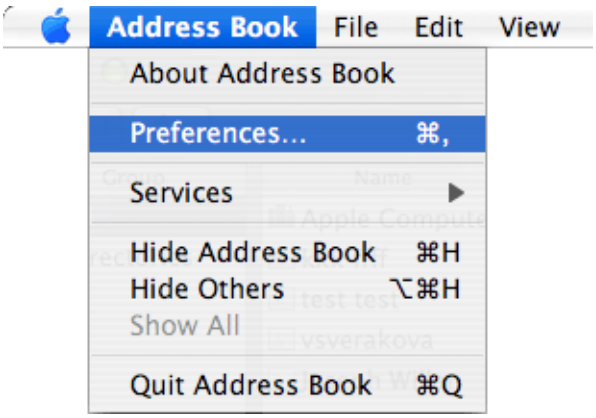


**Figure 12.2** Address Book → Preferences

3. Click on *Configure* and enter username and password for connection to an account in *Kerio Connect* (see figure 12.4):

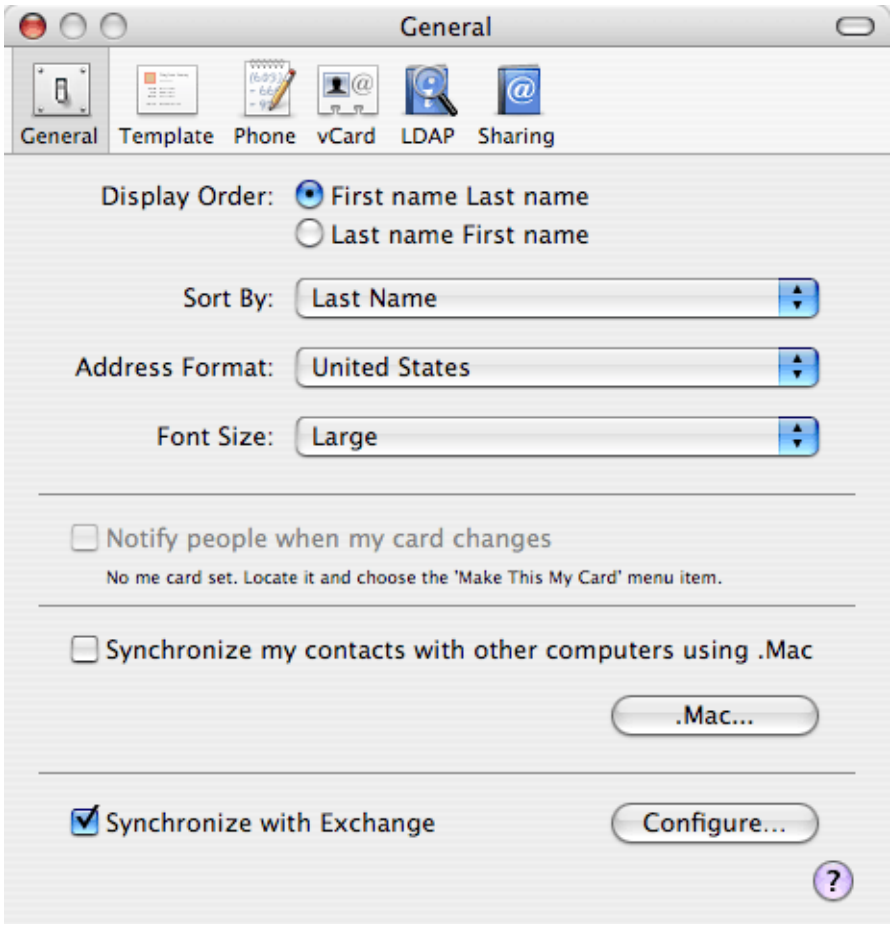


**Figure 12.3** Apple Address Book — General

**User Name, Password**

Specify login username and password for connection to a *Kerio Connect* account. If your mailbox is not created in the primary domain, it is necessary to enter username including the domain, following this pattern:

`user_domain@domain`

For example:

`dsutterland@company.com`

Ask your network administrator whether your user account is created in the primary domain or not.

**Outlook Web Access Server**

It is necessary to specify this entry by the full path to the corresponding account in the following form:

`http://server_name/exchange/user_name`

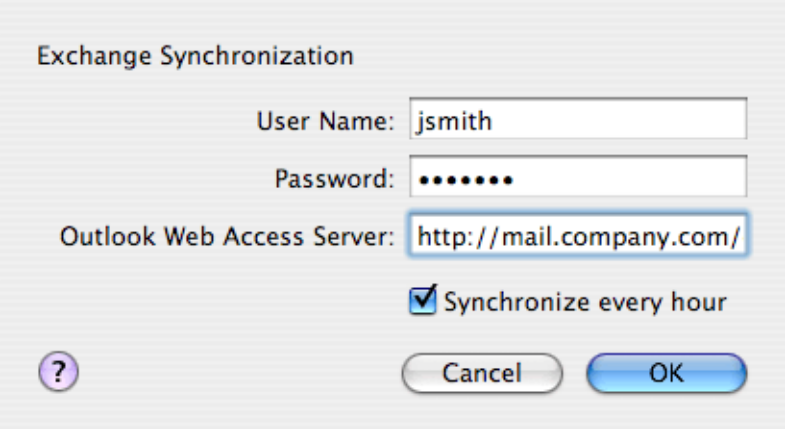


**Figure 12.4** Login data settings

for example:

`http://mail.company.com/exchange/wsmith`

**Synchronize every hour**
If this option is checked, synchronization of contacts is performed once an hour.

Once the connection to the server is set, it is necessary to configure *Apple iSync*, the synchronization utility which allows synchronization of various types of applications and devices on *Mac OS X*. This setting allows manual synchronization of contacts.

The settings can be done as follows:

1. Run the *Apple iSync* application.

2. In the *iSync* menu, click on *Preferences*.

3. In the *iSync Preferences* dialog box, check the *Show status in menu bar* option (see figure 12.5).

4. Now, it is possible to synchronize *Apple Address Book* whenever needed. A synchronization icon appears in the right top corner of the screen. Click this icon and select *Sync Now* in the menu (see figure 12.6).

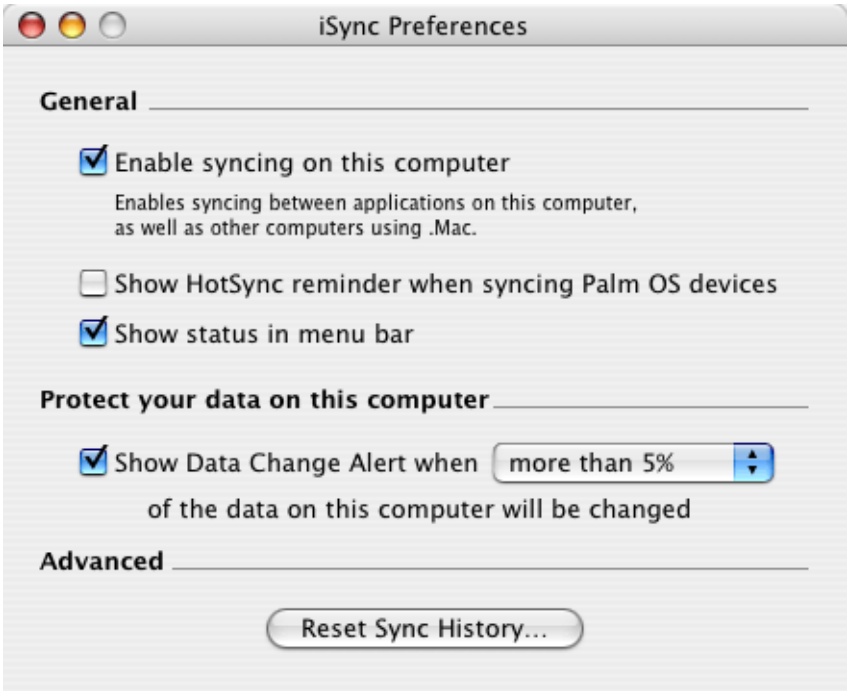


**Figure 12.5** iSync Preferences

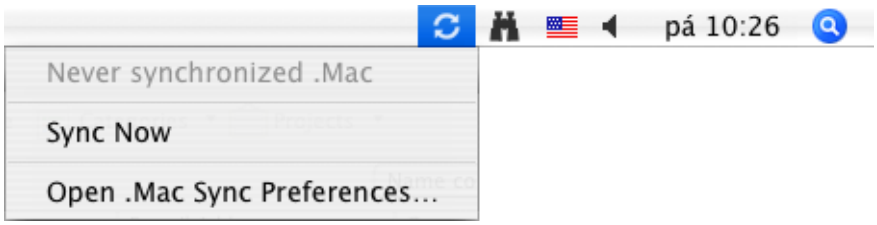


**Figure 12.6** Starting synchronization

### 12.2.2 Mac OS X 10.6 Snow Leopard and higher

On *Mac OS X 10.6 Snow Leopard* and higher, you can synchronize *Apple Address Book* contacts either with *Kerio Sync Connector* or via the native protocol CardDAV.

In this product, *Kerio Technologies* features *Auto-configure Address Book*, a special tool for automatic configuration of CardDAV accounts. This implies that now you simply download and run this tool on your computer.

The only information required for the installation is as follows:

- username and password for the corresponding account,
- username and password for an account with administration rights for the workstation.

***Warning:***
If you have installed and configured the latest version of *Kerio Sync Connector*, synchronization of contacts over *Kerio Sync Connector* is stopped automatically upon setting a CardDAV account.
However, it is recommended to uninstall *Kerio Sync Connector* before running the autoconfig tool.

### *Automatic configuration of CardDAV accounts*

To run the autoconfig file, follow these instructions:

1. The tool can be downloaded from the special page *Integration with Mac OS X*. To open this page, go to the *Kerio WebMail* interface's *Settings→ Integration with Mac OS X* (see figure 12.7).

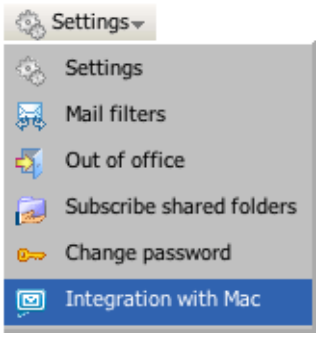


**Figure 12.7** Kerio WebMail — Settings

*Note:*
For detailed instructions on authentication to *Kerio WebMail*, refer to chapter 1.2.

2. On the *Integration with Mac OS X* page just opened (see figure 12.8), click on the *Auto-configure Address Book* link.

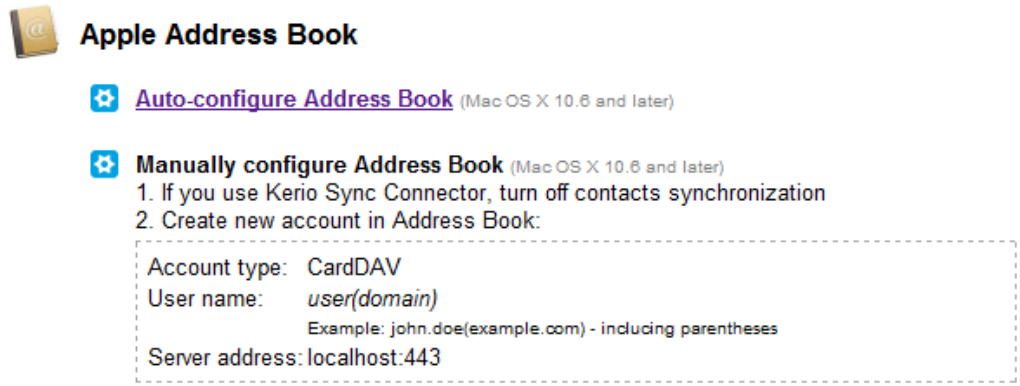


**Figure 12.8** Integration with Mac OS X

> ***Warning:***
> The autoconfiguration tool must be downloaded from the server of the name for which the SSL certificate is issued.
> If you are not sure about this issue, download a new certificate from the integration page first and then install the autoconfig file for *Apple Address Book*.

3. The tool gets downloaded to your workstation and gets launched automatically (see figure 12.9). Click on *Continue*.

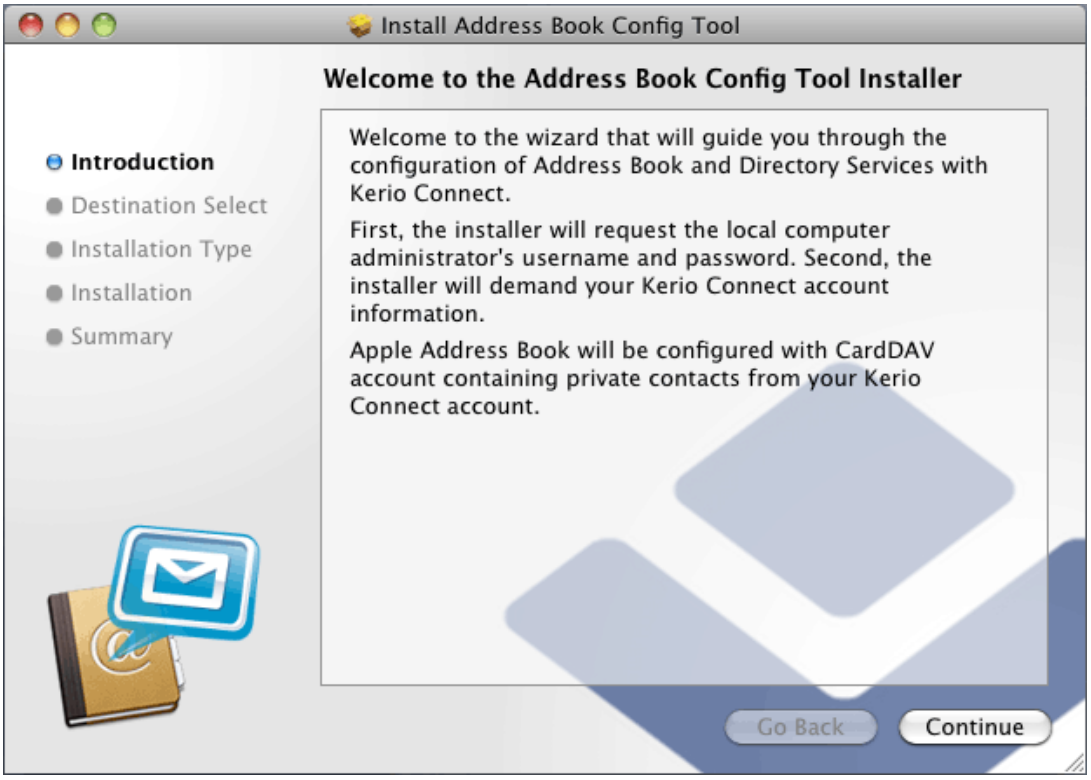


**Figure 12.9** Starting the Auto-configure Address Book tool

4. In the next page, select location where the tool will be saved and where it will be launched from.

   Unless motivated by specific reasons, do not change the default settings and click on *Install*.

5. Now enter username and password of an administration account for your computer (see figure 12.10).

6. Then specify login username and password for connection to a *Kerio Connect* account.

7. After finishing the process in the wizard, contact synchronization via CardDAV will be ready to use.

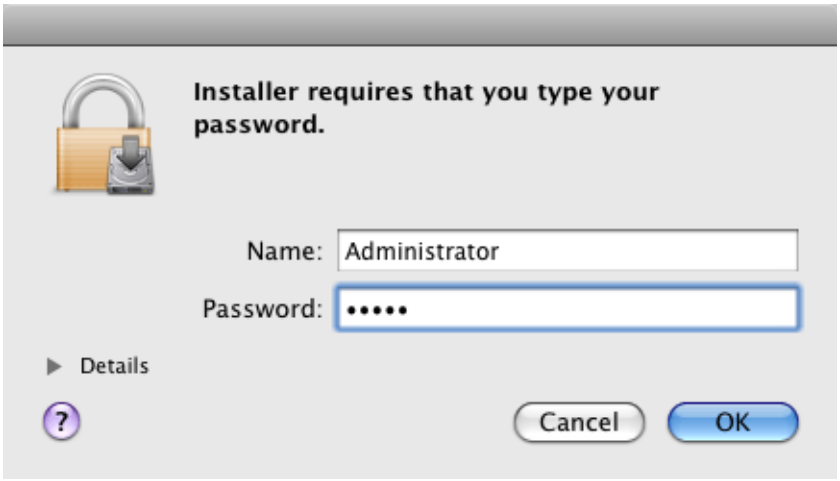


**Figure 12.10** Entering administration username and password

***Warning:***
The *Auto-configure Address Book* tool can be also used for synchronization of shared contacts.
However, if a user shares any of their contact folders after the autoconfig tool is used, it is necessary to run the *Auto-configure Address Book* operation again to involve the newly shared contacts in your synchronization.

### *Manual configuration of CardDAV accounts*

You can set up CardDAV account automatically by following these steps:

1. If you use *Kerio Sync Connector*, disable contact synchronization.
2. In *Address Book* create a new account with the following parameters (see figure 12.11):
   - *Account type* — CardDAV
   - *Username* — user(domain)

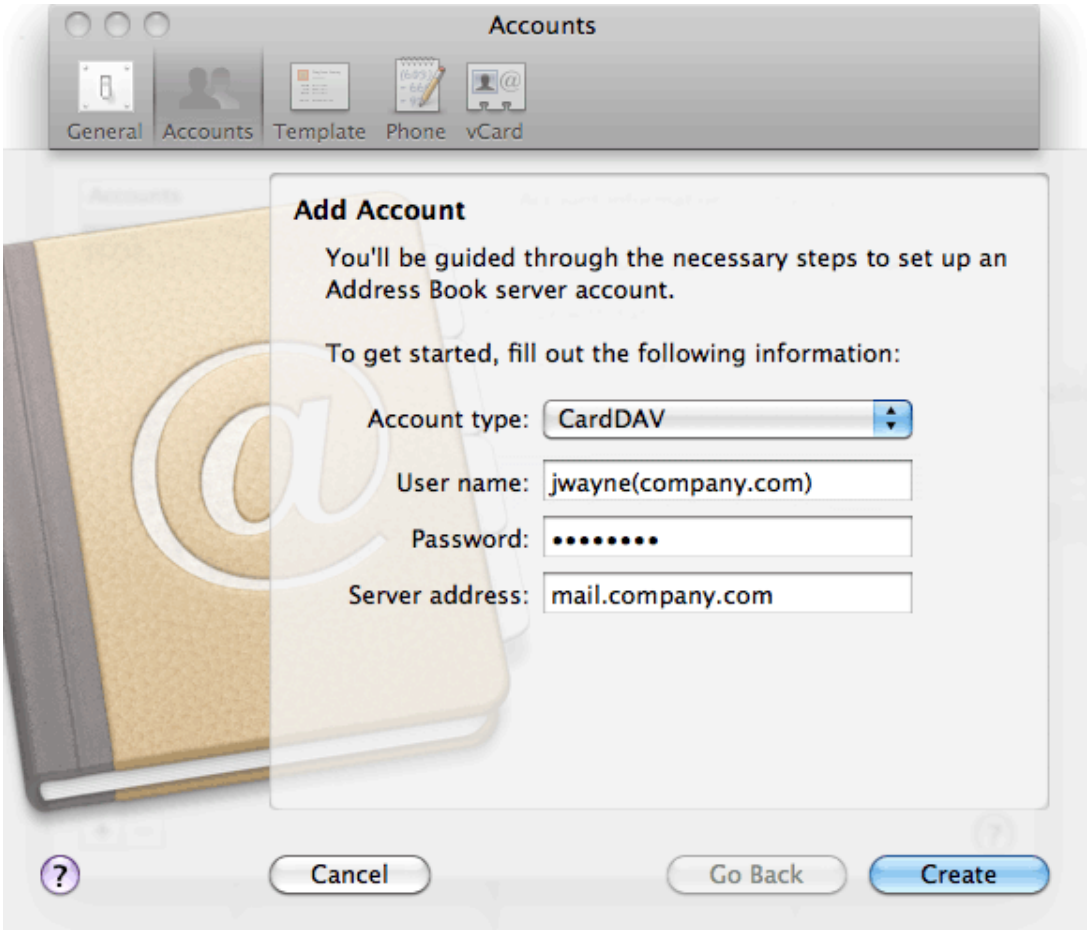


**Figure 12.11** CardDAV account settings

> ***Warning:***
> Username and domain must include the parenthesis. Example: `jsmith(company.com)`
> If the user belongs to the primary domain, you can use username without domain.

- *Server address* — enter the server address

3. Confirm by clicking on *Create*.

Chapter 13

# Kerio Sync Connector for Mac

*Kerio Sync Connector* is an application which allows bi-directional synchronization of local events, contacts and To Do items (tasks) between *Apple iCal* and *Apple Address Book* with an email account in *Kerio Connect*.

The main benefit of *Kerio Sync Connector* is that the synchronization for both applications can be set at a single point. Moreover, *Apple iCal* data is synchronized in both directions for the selected calendar(s) which use the *Kerio Connect's* data store.

> ***Warning:***
> *Kerio Sync Connector* does not support synchronization of distribution lists.

If you use Mac OS X 10.5 Leopard, it is recommended to use rather synchronization via the built-in CalDAV account in *Apple iCal* (for details, see section 11.2) than via *Kerio Sync Connector*. This can be done by disabling calendar synchronization upon installation of the *Kerio Sync Connector* and setting a CalDAV account in *Apple iCal* (for details, read section 11.2.2). These settings will not affect synchronization of contacts in *Apple Address Book*.

*Note:*

- Local contacts are always synchronized along with the default private *Contacts* folder.
- Calendars and contacts saved in *Kerio Connect* as subfolders will not be synchronized.
- *To Do* items are synchronized against the *Tasks* folder. In *Apple iCal*, items of the *Tasks* folder will be synchronized with the *Calendar* folder. If synchronization of the *Calendar* folder is not allowed, tasks will not appear in the *To Do* items in *Apple iCal*.

## 13.1 Installation

*Kerio Sync Connector* can be installed on workstations with operating systems Apple Mac OS X 10.4.11 and higher.

The installation is performed with the `kerio-connect-ksc-xxx-xxx-mac.dmg` installation package which can be acquired as follows:

1. Go to the *Kerio WebMail* interface (see section 1.2).
2. Go to *Settings* → *Integration with Mac OS X*.
3. On the *Integration with Mac OS X* page, click on the *Download Kerio Sync Connector* link.

Once the package is downloaded, follow these instructions:

1. Open the package by double-clicking.

2. This opens the *Finder* installation package as a disk and offers the *Kerio Connect Installer* executable. Click on it to run the installer (see figure 13.1). A standard installation wizard is started.

**Figure 13.1** Kerio Sync Connector Installer

3. The first page includes the license agreement. Confirm it and click on *Next* to continue.

4. Select the *Easy Install* installation type and click on *Next*.

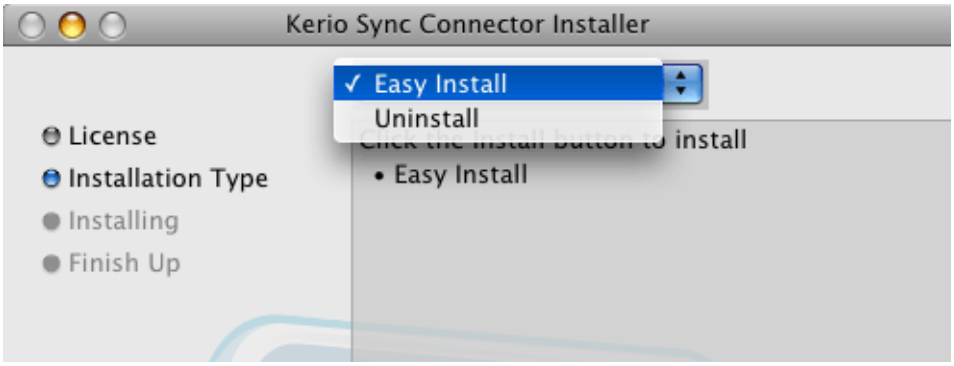


**Figure 13.2** Installation settings

5. Now, the installation is started.

6. The last page informs about successful completion of the installation process. Close the wizard by using the *Quit* button.

## 13.2 Synchronization settings

User interface of the *Kerio Sync Connector* can be run via *System Preferences* in section *Other* (see figure 13.3).

**Figure 13.3** Kerio Sync Connector

Click on the *Kerio Sync Connector* icon. This opens a simple configuration dialog with tabs *General* and *Advanced* and with the *Synchronize now* button by which synchronization can be started manually.

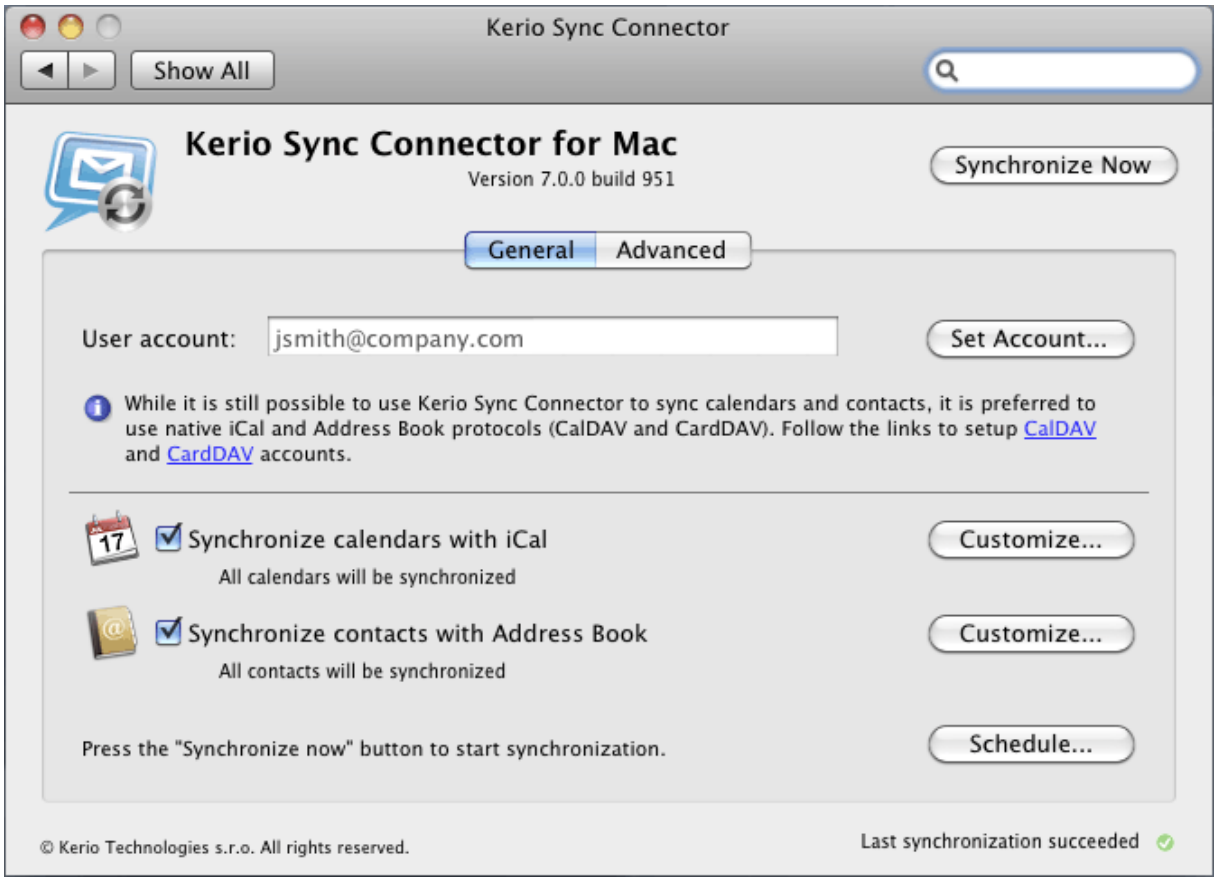


**Figure 13.4** Kerio Sync Connector — the General tab

### *General*

The *General* tab allows the following settings:

### User account

To enable connection of the *Kerio Sync Connector* to the particular account, server data as well as login username and password for the account are needed to be saved. This can be done by the dialog opened by clicking on the *Set account* button.

Enter username and password used for connection to the *Kerio Connect* account and DNS name or IP address of the server (see figure 13.5).

The dialog also provides an option of SSL encryption of traffic between the server and the client. To enable SSL encryption, check *Use Secure Socket Layer connection*. If the HTTP(S) service is running on a non-standard port, it is necessary to enable the *Override default port number* option and change the traffic port.

*Note:*

Once SSL-encryption is set, it is necessary to install the trustworthy *Kerio Connect* certificate.

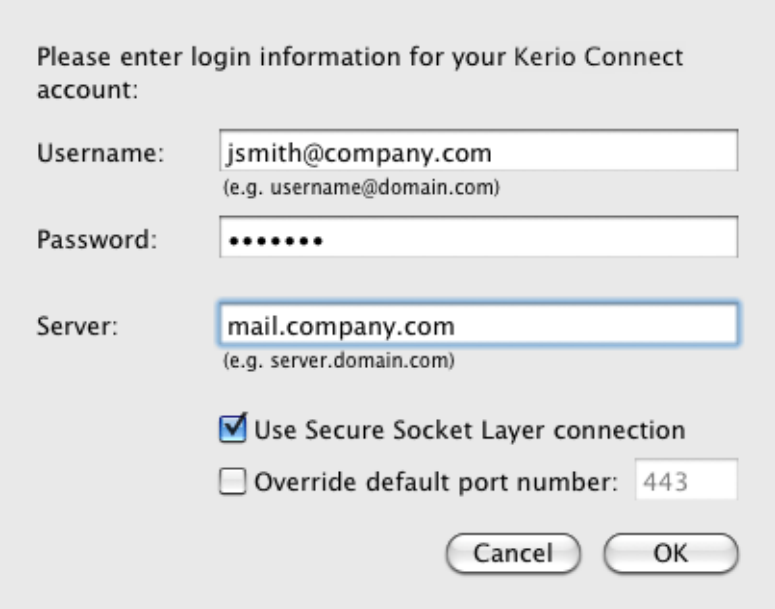


**Figure 13.5** Kerio Sync Connector — synchronization account settings

### Synchronize calendars with iCal

By checking this option, you will run synchronization of events in *Apple iCal*.

Click on the *Customize* button located on the right to the *Synchronize calendars with iCal* option and set calendars to be included in synchronization (see figure 13.6):

#### Synchronize

Use the menu to set whether all calendars or only selected ones will by synchronized. In case of *Only selected calendars* option, select calendars to be synchronized. The list includes all calendars created in *Apple iCal* and also calendars created in *Kerio Connect* as direct subfolders of the root folder (details on the root folder are available in section 1.12.1). This implies that it is not possible to synchronize subfolders nested deeper. To make it possible to synchronize a folder, move it to the appropriate level, directly under the root folder.

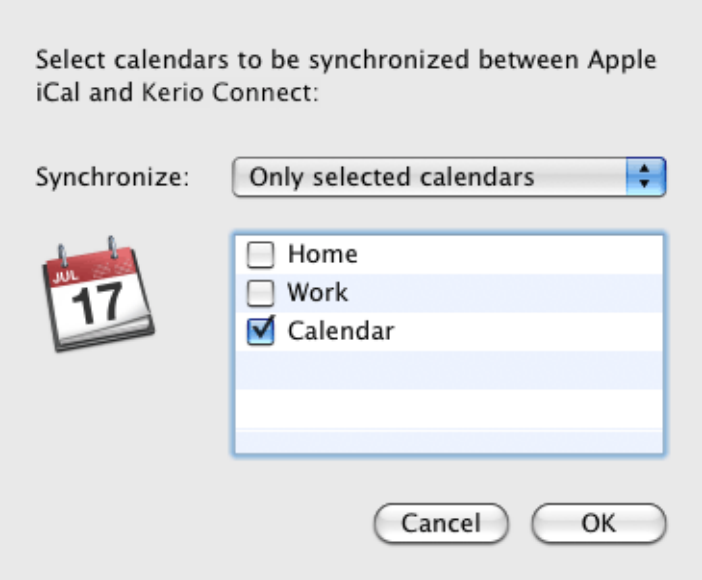


**Figure 13.6** Kerio Sync Connector — selection of calendars

*Note:*
The default *Kerio Connect's* Calendar folder is synchronized automatically and it is shown as Calendar in *Apple iCal*. Folders can be renamed in *Apple iCal* without the risk of interruption of the synchronization. In *Kerio Connect*, the name Calendar will be kept for the folder.

### Synchronize contacts with Address Book

By checking this option, you will run contact synchronization in the *Apple Address Book*. Click on the *Customize* button located on the right to the *Synchronize contacts with Address Book* option and set contacts to be included in the synchronization (see figure 13.7): List of folders will include all contact folders located in *Kerio Connect* as the first level folders. Subfolders will not be synchronized.
In the *Synchronize* menu (see figure 13.7), define whether to synchronize all contact folders or only selected ones. In case of *Only selected folders* option, select contact folders to be synchronized. Each contact created in *Address Book* will be synchronized with the *Contacts* folder in *Kerio Connect*. Therefore, it is recommended to always keep the *Contacts* folder option checked.

> ***Warning:***
> Before starting of synchronization of *Address Book*, it is necessary to enable the *Synchronize with Exchange* option in *Address Book* → *Preferences* → *General* (see figure 12.3).

### Schedule

Use the *Schedule* button to set automatic synchronization (see figure 13.8). Enable automatic synchronization by checking the *Automatically synchronize changed items* option.

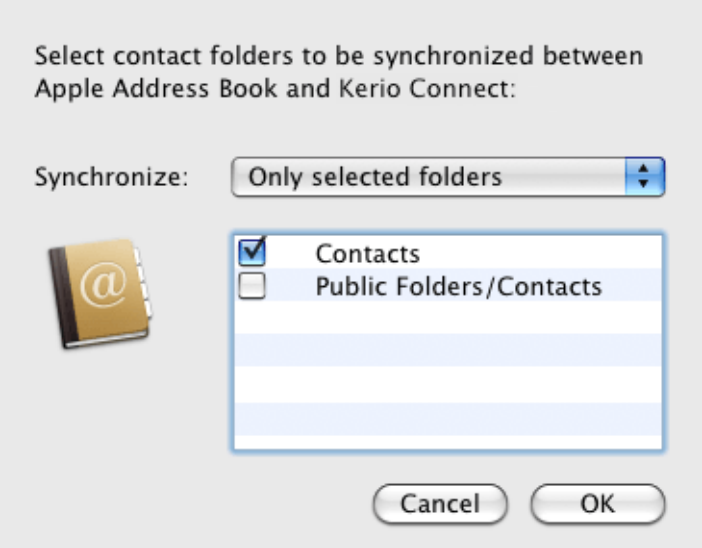


**Figure 13.7** Kerio Sync Connector — contact folders selected for synchronization

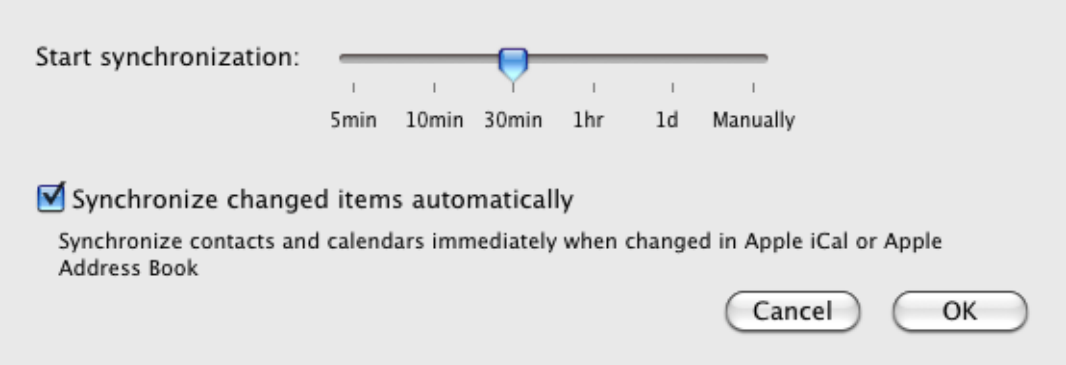


**Figure 13.8** Kerio Sync Connector — enabling automatic synchronization

### *Advanced*

The *Advanced* tab (see figure 13.9) allows setting of solutions for possible synchronization collisions. The menu provides the following options to select from:

**Enable debug logging**
: To enable logging, check this option. Synchronization information will be logged in the `Console.log` log located in the *Console* application (*Applications* → *Utilities* → *Console*).

**Repair broken synchronization...**
: Synchronization fix allows to fix data damaged during synchronization. The application creates a copy of all data and saves it to both the client's and the server's store. Synchronized data on the server and the client will be identical.

**Figure 13.9** Kerio Sync Connector — Advanced

***Warning:***
If some calendars or contact folders are selected for the synchronization, the repair will remove any folders not included in the process.

Upon clicking on the *Repair* button, you can select whether the data copy will be created on the server or on the client. It is useful to select the location with fresher data (see figure 13.10).

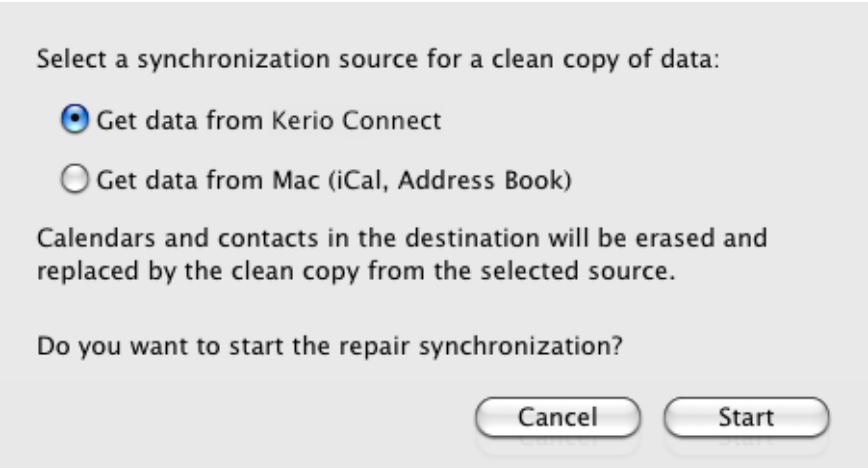


**Figure 13.10** Kerio Sync Connector — recovery of synchronized data

If the *Get data from Kerio Connect* option is selected, rename the calendar synchronized at *Kerio Connect* as Calendar (different name can be used in *Apple iCal* if renamed) back to Calendar. Unsupported attributes such as calendar skin color can be also used in the synchronized items.

> ***Warning:***
> Before the repair, it is recommended to back up current data.

**Report the synchronization problem to Kerio**

If the you do not manage to solve the problem by yourself, report it to *Kerio Technologies* where it will be analyzed and solved.

> ***Warning:***
> Any information recorded in the log are used only to solve problems associated with usage of this product. The data will not be misused.

## 13.3 The process of the synchronization

After setting of *Kerio Sync Connector*, the *Sync Alert* dialog is opened (see figure 13.11) which is opened whenever more than 5 per cent of the store is to be synchronized. Click *Allow* for confirmation. *Sync Alert* is displayed separately for *Apple iCal* and for *Apple Address Book*.

**Figure 13.11** Kerio Sync Connector — recovery of synchronized data

*Note:*
*Sync Alert* can be disabled in *Apple iSync*.

The first synchronization can take up to several minutes since a large volume of data is usually synchronized.

### Apple iCal

Once synchronization is set (see section 13.2), a cross copy of all items included in synchronization is made between *Kerio Connect* and *Apple iCal*.

The default private *Kerio Connect's* calendar is copied to *Apple iCal* as Calendar.

Special folders will be created in *Kerio Connect* during the first synchronization. Names of the folders will match names of their twin calendars created in *Apple iCal*.

### Apple Address Book

Once synchronization is set (see section 13.2) a cross copy of all contacts included in synchronization is made between *Kerio Connect* and *Apple iCal*.

*Kerio Sync Connector* synchronizes also the information of the group in *Apple Address Book* that the contact belongs to. In *Kerio Connect*, this information is kept as a category. This means that in the *Kerio WebMail* interface or in email clients supporting categorization, contacts belonging to groups display their group name as a category.

This works also the other way round. All categories used in *Kerio WebMail's* or another client's contacts are shown as standalone contact groups in the *Apple Address Book*.

Chapter 14

# Support for Apple Mail

*Kerio Connect* supports some groupware features of IMAP and Exchange accounts in *Apple Mail 10.4* and higher. The support enables to display events, contacts and task folders in the email client.

Cooperation of *Kerio Connect* with *Apple Mail* is supported directly. This means that it might happen that no additional application applies to client stations.

If you use Apple *Address Book* and set LDAP in it, automatic check for addresses will be available in *Apple Mail* (settings are described in section 12).

The simplest and fastest way to configure *Apple Mail* is by using the *Kerio Connect Account Assistant* autoconfig wizard. For details, see chapter 8.

## 14.1 Apple Mail 10.4

### 14.1.1 Exchange account in Apple Mail

Support for *Apple Mail* in Exchange accounts results in displaying of all calendar folders included in a particular user account in *Kerio Connect*. *Apple Mail* does not support the calendar view mode and therefore each event is displayed as one email message. Such messages include an `.ics` attachment with all data associated with the corresponding event.

Thus, each event can be simply imported to *Apple iCal* (for details, see chapter 11) where it can be displayed easily.

Another benefit of the settings is that all types of public folders can be viewed in the account. The following folder types are displayed:

- email
- contacts
- calendar
- tasks
- notes

*Apple Mail* displays all types of public folders since their download is always performed via the IMAP protocol.

***Warning:***
If folders are not displayed, contact your administrator.

### 14.1.2 IMAP account in Apple Mail

Support for *Apple Mail* in IMAP accounts allows viewing of all mail folder types. This applies also to all types of public folders. However, only folders created directly from the mailbox root folder can be actually viewed.. Subfolders are not displayed. In IMAP accounts in *Apple Mail*, the following items are displayed:

- email
- contacts
- calendar
- tasks
- notes

However, this support is limited by features of the email client. Therefore, all events, contacts, tasks and notes will be displayed only as email messages with an attachment where all data associated with the corresponding event, contact or task will be included. Events and tasks include attachments in the `.ics` format, contacts include attachments in `.vcf`.

If you use *Apple Mail* as an email application, it is possible to simply import each event to *Apple iCal* (for details, see chapter 11) where it can be viewed in a selected calendar.

*Note:*
Although contacts are saved as `.vcf` attachments, it is not possible to import them to the *Apple Address Book*.

### 14.1.3 Learning of the antispam filter

*Kerio Connect* contains the *SpamAssassin* antispam filter. This filter is based on content analysis (spam messages usually contain specific attributes that can be searched for and evaluated by the filter). Each message is assigned a numeric score; if this value exceeds the limit set in *Kerio Connect*, the message is marked as spam.

The spam filter may let some spam messages through from time to time by mistake (their score is low) and mark some regular messages as spam (their score is too high). For the reasons above, the antispam filter allows modification to the database used for recognition of spam messages. This method, however, requires user input. Users have to reassign the incorrectly evaluated messages to correct types (spam / non-spam) so that the filter learns to recognize them in the future.

Messages which were marked incorrectly can be re-evaluated by moving them in corresponding folders. To be specific, to mark a message as spam, move it to the *Junk E-mail* folder. To mark a message as legitimate (if it was marked as spam incorrectly by the system), move it to *Inbox*.

For more comfortable moving of spam to *Junk E-mail*, use the *Junk* button on the *Apple Mail* toolbar. This option is helpful where spam was let into INBOX and was not marked as spam. Simply select such messages and click on *Junk*. Once the button is clicked, the message selected is moved to the *Junk E-mail* folder and the filter learns to mark similar messages as spam.

> ***Warning:***
> Unfortunately, it is not possible to add a *Not Junk* button for cases where legitimate messages are marked as spam. This happens because the message was marked as spam in *Apple Mail* but it was not moved to *Inbox* and the spam filter would not be capable of learning the features of the message.

### *The Junk button settings*

To make the *Junk* button work correctly and move email to *Junk E-mail*, perform the following settings:

1. Select the *Preferences* item in the *Mail* menu.
2. This opens a dialog with *Apple Mail* settings. Click on the *Junk Mail* icon to open the *Junk Mail* tab (see figure 14.1).
3. Make sure that the *Perform custom actions (Click Advanced to configure)* is set for the *When junk mail arrives* item . If not, change the setting.
4. Click on *Advanced*
5. to open another configuration dialog and fill the *Perform the following actions* entry in as described below (see figure 14.2):

**Figure 14.1** The Junk Mail tab

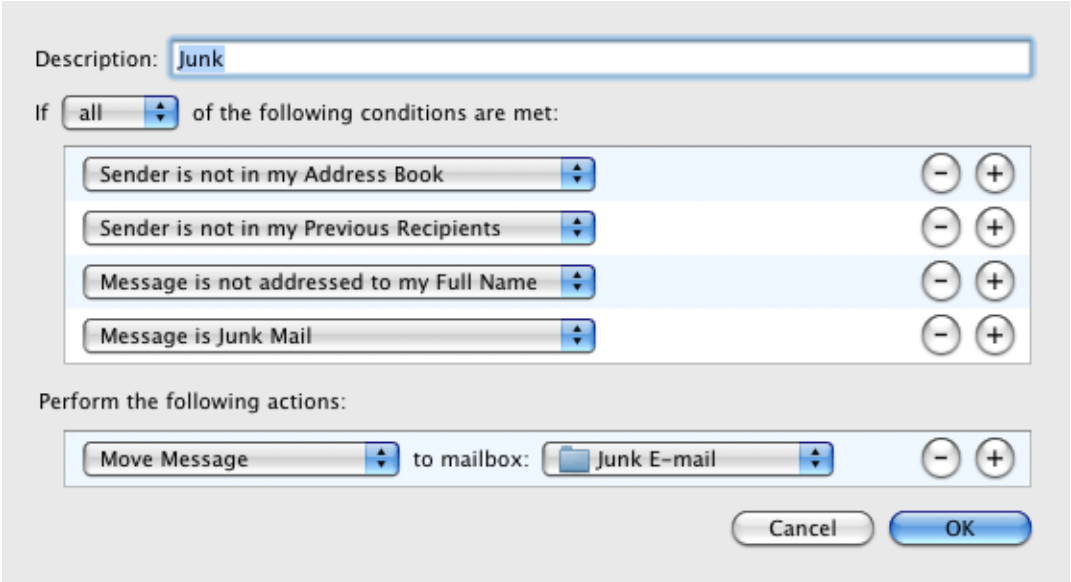


**Figure 14.2** The Junk Mail tab, Advanced settings

- In the first menu, select *Move Message*.
- In the second one, select the *Junk E-mail* folder.

The process is shown at figure 14.2.

6. Click *OK* to confirm settings.

## 14.2 Apple Mail 10.5

### 14.2.1 Exchange account

Support for *Apple Mail* in Exchange accounts results in displaying of all the following folder types saved in *Kerio Connect*.

- email,
- calendar,
- notes,
- tasks — these items are saved in a special folder created in To Do.

*Note:*
In *Apple Mail*, only direct subfolders of the root folder can be viewed. Further subfolders will not be shown.

As to public folders, the following types are displayed:

- email,
- calendar,
- notes,

Public folders are displayed only if subscribed (click on the arrow in the *Public folders* toolbar and on the *Subscription List* tab check folders to display).

*Apple Mail* does not support the calendar view mode and therefore each event is displayed as one email message. Such messages include an `.ics` attachment with all data associated with the corresponding event.

Thus, each event can be simply imported to *Apple iCal* (for details, see chapter 11) where it can be displayed easily.

Note and To Do items created in *Apple Mail* can also be accessed via *Kerio WebMail*. They will be stored in the *Apple Mail To Do* folder.

### 14.2.2 IMAP account

Support for *Apple Mail* in IMAP accounts allows viewing of all mail folder types. This applies also to all types of public folders. However, only folders created directly from the mailbox

root folder can be actually viewed.. Subfolders are not displayed. In IMAP accounts in *Apple Mail*, the following items are displayed:

- email
- contacts
- calendar
- tasks — these items are saved in a special folder created in To Do.
- notes

However, this support is limited by features of the email client. Therefore, all events, contacts, tasks and notes will be displayed only as email messages with an attachment where all data associated with the corresponding event, contact or task will be included. Events and tasks include attachments in the `.ics` format, contacts include attachments in `.vcf`.

If you use *Apple Mail* as an email application, it is possible to simply import each event to *Apple iCal* (for details, see chapter 11) where it can be viewed in a selected calendar.

*Note:*
Although contacts are saved as `.vcf` attachments, it is not possible to import them to the *Apple Address Book*.

Note and To Do items created in *Apple Mail* can also be accessed via *Kerio WebMail*. They will be stored in the *Apple Mail To Do* folder.

### 14.2.3 Learning of the antispam filter

This function is described in section 14.1.3.

Appendix A

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