

ZCP 7.1 (build 43630)

**Zarafa Collaboration
Platform**

The User Manual



Zarafa

ZCP 7.1 (build 43630) Zarafa Collaboration Platform

The User Manual

Edition 2.0

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The Zarafa Collaboration Platform (ZCP) combines the usability of Outlook with the stability and flexibility of a Linux server. It features a rich web-interface, the Zarafa WebAccess, and provides brilliant integration options with all sorts of clients including all most popular mobile platforms.

Most components of ZCP are open source, licensed under the [AGPLv3](http://www.gnu.org/licenses/agpl-3.0.html)¹, can therefore be downloaded freely as [ZCP's Community Edition](http://www.zarafa.com/content/community)².

Several closed source components exist, most notably:

⁴ <http://creativecommons.org/licenses/by-sa/3.0/>

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- the Zarafa Windows Client providing Outlook integration,
 - the Zarafa BES Integration providing Blackberry Enterprise Server connectivity,
 - the Zarafa ADS Plugin providing Active Directory integration, and
 - the Zarafa Backup Tools.

These components, together with several advanced features for large setups and hosters, are only available in combination with a support contract as part of *ZCP's Commercial Editions*³.

Alternatively there is a wide selection of hosted ZCP offerings available.

This document, the User Manual, describes how to use ZCP from a user's view point. It discusses:

- Outlook integration by using the Zarafa Windows Client,
- using the web-interface of the Zarafa WebAccess,
- connectivity with CalDAV and iCal enabled clients, and
- syncing with mobile platforms like: BlackBerry, Google Android, Windows Mobile and Apple iPhone.

³ <http://www.zarafa.com/content/editions>

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Introduction

The Zarafa Collaboration Platform (ZCP) combines the usability of Microsoft Outlook and Exchange with the stability and flexibility of a Linux server. It features a rich web-interface, the Zarafa WebAccess, and provides brilliant integration options with all sorts of clients including all most popular mobile platforms. Most components of ZCP are open source, licensed under the AGPLv3, can therefore be downloaded freely with ZCP's Community Edition.

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These components, together with several advanced features for large setups and hosters, are only available in combination with a support agreement as part of ZCP's Commercial Editions.

Alternatively there is a wide selection of hosted ZCP offerings available.

This document, the User Manual, describes how to use ZCP from a user's view point.

1.1. Scope of this document

This manual is intended for users of the Zarafa Collaboration platform. Users interact with this platform by several means:

- Microsoft Outlook and the Zarafa Windows Client,
- the Zarafa WebAccess, our open source web-based groupware solution, and
- various mobile platforms like: BlackBerry, Google Android, Windows Mobile and Apple iPhone.

Using the Zarafa WebAccess

In this section we describe how to use the Zarafa WebAccess, the web-based interface of the Zarafa Collaboration Platform (ZCP).

In order to use the Zarafa WebAccess a fairly recent version of Mozilla Firefox (preferred) or Microsoft Internet Explorer is needed.

Currently the Zarafa WebAccess supports the most used features of Microsoft Outlook in a fairly comprehensive way. Yet a web-based interface can never match the functionality and usability of a native client (like Microsoft Outlook).

2.1. Basics

To login to the Zarafa WebAccess, point the browser to the URL supplied by the systems administrator. By default this URL will look like:

http://YOUR_DOMAIN_NAME/webaccess/

The WebAccess is available in several languages which can be selected from the dialog shown on [Figure 2.1, "The Zarafa login screen"](#).



Figure 2.1. The Zarafa login screen

After logging in, all Outlook folders and the Public folders the account has access to can be accessed. The most basic functions are available from the WebAccess' toolbar found across the top of the page. See [Figure 2.2, "The "New" Menu"](#).



Note

With regards to the folders, some functionality is only available in the context menu that appears when right clicking on the folder items.

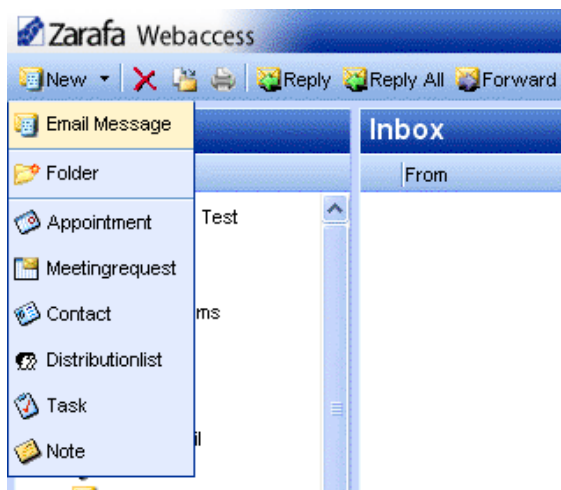


Figure 2.2. The “New” Menu

2.2. Managing folders

Creating, moving, renaming, copying or deleting (sub) folders is accomplished with the right mouse button in the folder list. This pops-up a context menu as shown in [Figure 2.3, “The context menu of a folder”](#).

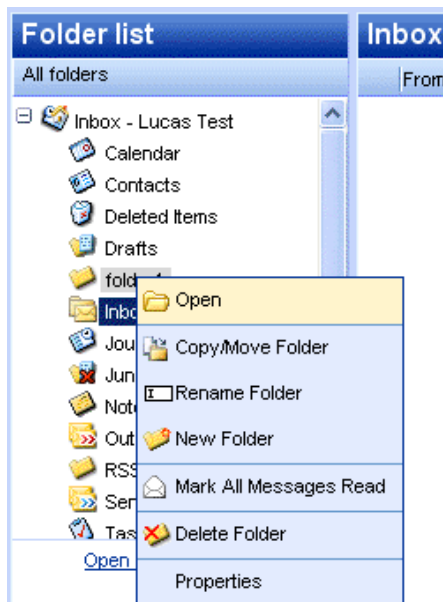


Figure 2.3. The context menu of a folder

It is not possible to delete, move, or rename default Outlook folders (like *Inbox*, *Calendar* and *Contacts*).

2.2.1. Printing

It is possible to print email, appointments, and contacts from the WebAccess. Simply use the *Print* button from the toolbar.

Following these steps it is also possible to print calendar overviews of a day, a week or a month.

2.2.2. Resizing panes

Just like in Outlook it is possible to resize the panes in the WebAccess, allowing full control of the width and height of the workspace in each pane. To do so place the mouse between two panes and drag the pane border to the preferred location.

2.2.3. Empty deleted items folder

The *Deleted Items* folder can be emptied by using the right mouse button, and selecting option *Empty folder* from the context menu. This option is only available from the context menu (accessed with the right mouse button) of the *Deleted Items* folder and the *Junk Email* folder (if it exists).

2.2.4. Restore items

When deleting an item in the *Deleted Items* folder or the *Junk Email* folder, the item is still temporarily recoverable. Select the *Deleted Items* folder or *Junk Email* folder, and use the button *Restore Item* in the bar at the top. As shown in [Figure 2.4, “The soft delete restore window”](#) it is possible to restore all or a selection of the deleted messages or folders. The restored items will be moved to the old location. Deleting items from [Figure 2.4, “The soft delete restore window”](#) removes them permanently — in that case only backups can recover an item. When restoring a folder, only that folder will be restored. If the restored folder contained subfolders, these can be restored by selecting the just restored folder and clicking on the *Restore Item* button again.

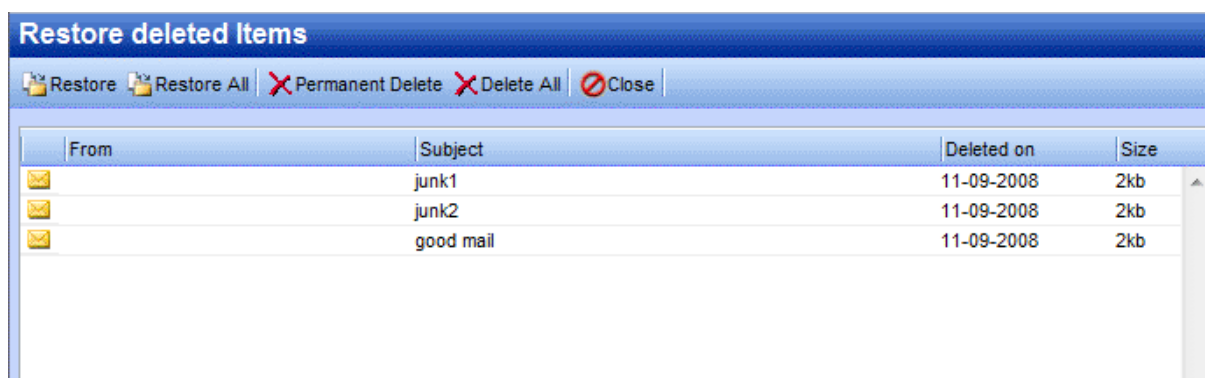


Figure 2.4. The soft delete restore window

2.2.5. Marking all messages in a folder as read

Marking all messages in a folder as “read” is accomplished by the right mouse button menu option *Mark All Messages Read*. Please note that when this option is selected, no read receipts will be sent when requested by a sender, even if that option is selected in the settings.

2.2.6. Properties

The right mouse button menu option *Properties* shows additional information about a folder (like the storage size and the number of items in this folder). For more details about the storage size, use the button *Folder size...*. Here a list containing all subfolders in the folder including their individual storage sizes can be seen.

2.3. Access to folders and calendars for other users

Just like in Outlook, the WebAccess allows sharing permissions to be set on folders. To do so use the right mouse button to click on a folder and choose the *Properties* option, then select the *Permissions* tab as shown in *Figure 2.5, "Folder Permissions"*.

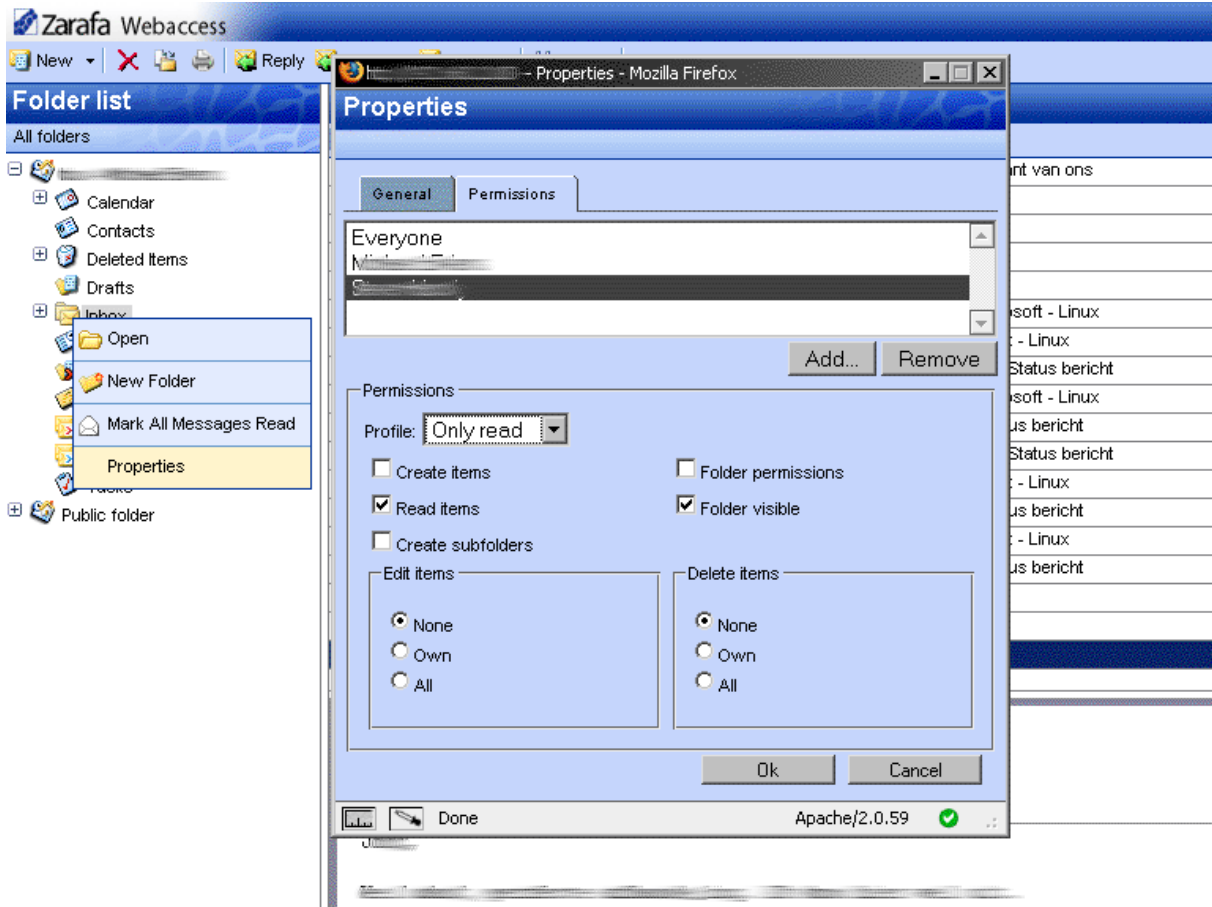


Figure 2.5. Folder Permissions

2.3.1. Add a person

Click on the *Add* button under the *Permissions* tab.

When the *Address Book* pops up, select the person to give permissions to and click *Ok*. This contact will then be added to the permissions list.



Note

Please note that this persons' permissions must be changed. As by default the dialog grants no additional permissions.

Click *Ok* to save and close the permissions window.

2.3.2. Change permissions

Click on the person whose permission needs to be changed.

Now the permissions can be manually set in the bottom part of the permissions window, or one of the preset profiles can be selected from the *Profile* drop-down menu.

Click *Ok* to save and close the permissions window.

2.3.3. Remove a person

- Click on the person who needs to be removed from the list.
- Click on the *Remove* button.
- Click *Ok* to save and close the permissions window.

2.3.4. Open shared folders

To open shared folders from the Zarafa WebAccess click the *Open shared folder* link at the bottom of the folder list. A window as shown in *Figure 2.6, "Open Shared Folder"* will be presented.



Figure 2.6. Open Shared Folder

From the dialog shown in *Figure 2.6, "Open Shared Folder"* it is possible to either open a single folder (for example the calendar folder), or open a complete folder list of a specific user.

The opened folders are stored in the users' WebAccess profile, so the next time the user tries to login to the WebAccess the opened folders are readily available.

To close an opened folder, use the *Close store* option in the right mouse button menu.

2.4. Email

2.4.1. Compose and send a new email

1. Select the button *New* in the left corner. This will show a dialog like *Figure 2.7, "Create Mail"*.

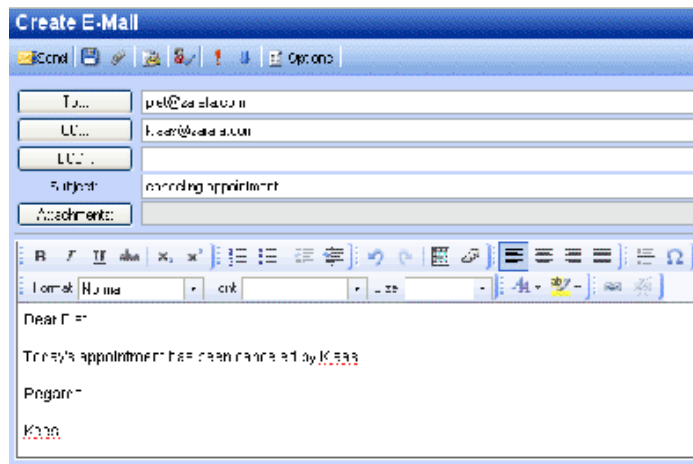


Figure 2.7. Create Mail

2. Attachments can be added to the email by selecting the *Attachment* button or the *Paperclip* icon.
3. Email can be saved by selecting the *Floppy disk* icon. After a email is saved, it is stored in the *Drafts* folder.
4. To set a flag that marks the email as important or high priority, click on the *exclamation mark (!)* icon.
5. To add a recipient, either add their email address in the *TO*, *CC*, or *BCC* field manually, or select a person from the Address Book. To access the Address Book, click on the *TO*, *CC* or *BCC* button.



Note

When more than one recipient is added, email addresses need to be separated by a semicolon (;).

6. The internal users are shown by default (unless otherwise selected in Settings) in the Address Book (see: [Figure 2.8, "Address Book"](#)). By using the *Show names from the:* drop-down menu, it is possible to view contacts from either a personal contacts folders, or a Public contact folder. Alternatively, it is possible to search a folder using the search field positioned in the top left of the window.

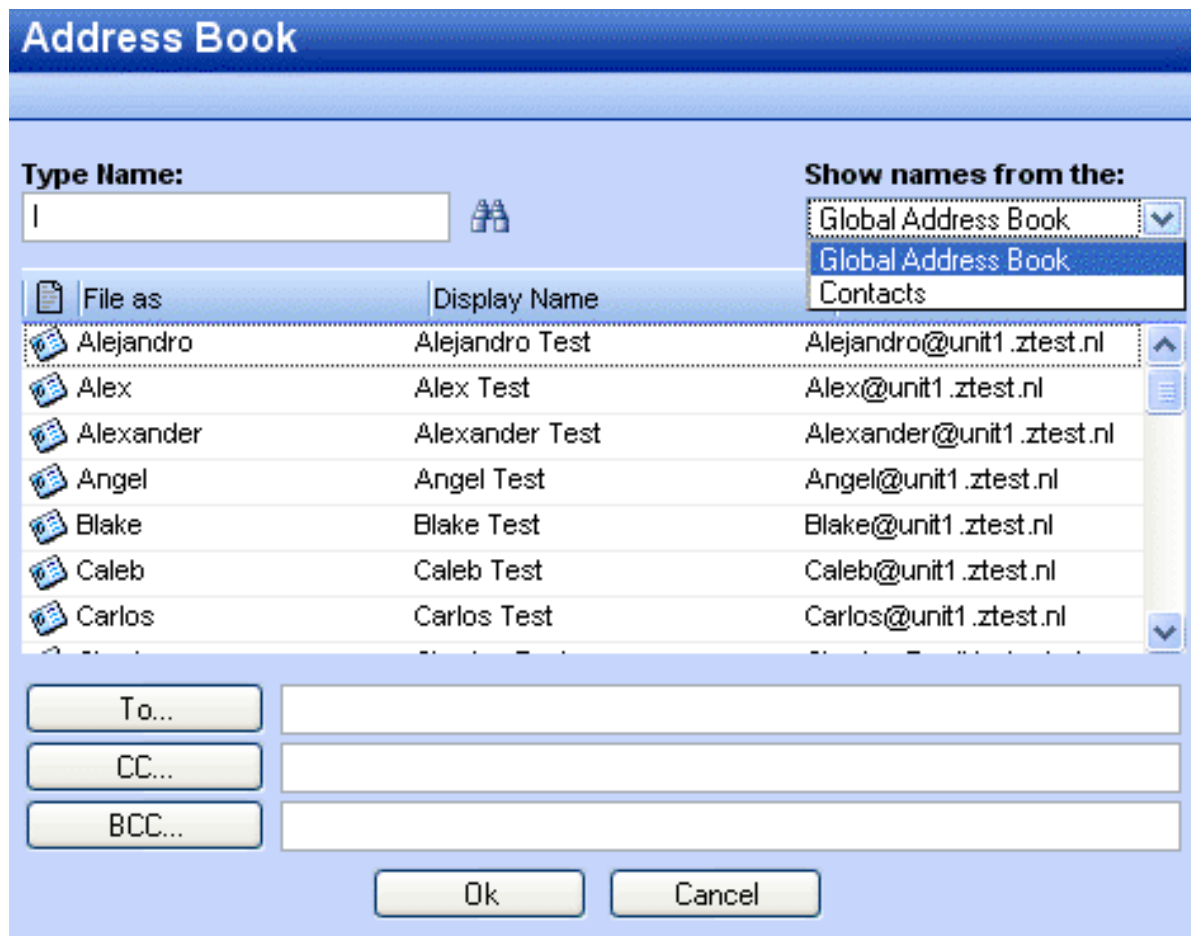


Figure 2.8. Address Book

**Note**

Since 6.30.0 it is possible to add company-wide defined address lists in the Address Book. Read the **ZCP Administrator Manual** for more details regarding address lists.

2.4.1.1. Automatic email address suggestion

When typing an email address or contact information in the *TO*, *CC* or *BCC* fields the WebAccess automatically suggests names (a feature often known as *auto complete*). The suggestions are listed below the input field (see: [Figure 2.9, "Automatic Suggestions"](#)) and a suggestion can be selected by both mouse or keyboard. The suggestions are based on email addresses and contact information that have been used recently.

It is possible to delete an address from this list by moving the selection to the address in question (by either using the keyboard arrows or by placing the mouse over it without clicking) and then pressing the *Delete* key. The address is removed, but when it is used again it will show up in the list once more.

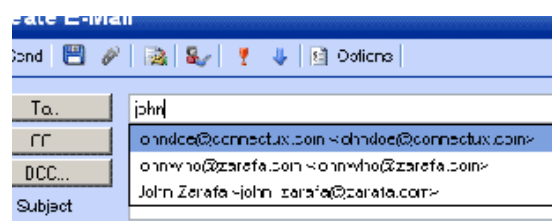


Figure 2.9. Automatic Suggestions

2.4.1.2. Attachments

You can attach files to your message by clicking the *Attachments* button in the *Create E-Mail* screen. A window will open, which allows files to be uploaded.

From ZCP 6.50 up it is possible to upload multiple attachments at once. Prior versions of ZCP only allow the upload of one file at a time.



Note

To upload multiple files at once, Adobe Flash has to be installed in the browser.

2.4.1.3. Set the sender address (*from* field)

It is possible to set the *FROM* address of emails before they are sent. This field can be found above the *TO* field, as shown in *Figure 2.10*, “*Selecting a from address*”. When no address has been selected the default address is used.

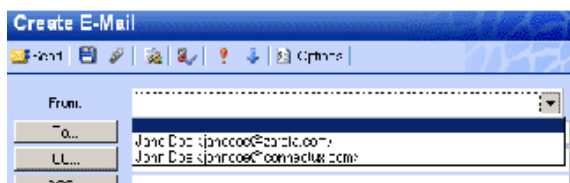


Figure 2.10. Selecting a from address



Note

Please note that the *FROM* field is only displayed when *FROM* addresses have been set in the settings dialog.



Figure 2.11. Adding From Addresses



Important

Please contact the systems administrator, if the following (bounce) message is returned when sending from a different sender address: *You are not allowed to send as the given user.*

Since ZCP version 6.20.0 two kinds of delegation are available:

1. Send on Behalf permissions: if a user grants the appropriate permission to another user, the latter can send items *on behalf of* the other user. In this case an email or meeting request will be sent with the following *From* field: “<delegate> on behalf of <user>”.

2. Send As permissions: if the system administrator gives the rights to user B to 'send as' user A, the receiver of an email will not see that user B sent an email. The receiver will only see user A in the *From:* field.

Before ZCP version 6.20.0, user themselves were allowed to "send on behalf of" by entering the other users inbox. By this method it was always explicitly visible who sent the email. For example: Pete enters the inbox of 'info' and sends an email as the non-active user 'info', would result in:

```
pete@example.com on behalf of info@example.com.
```

Since ZCP version 6.20.0 it is possible to send emails as other users without the "on behalf of" part. Due to security reasons the new "send as" permission is only configurable server-side by the administrator. This setting can always be overruled by the user itself and the old "on behalf of" permission can still be set by the user.

Keep in mind that delegation always overrules impersonation. A user can always choose not to let another user impersonate as himself.

2.4.1.4. Saving an email to drafts

Saving an email is possible by clicking the Save (a floppy disk) icon. After saving the email, it is stored in the *Drafts* folder. Another option is to automatically save an unsent email. This option is available under the *Compose Mail* tab in the settings window. To do this, check the option *Autosave unsent every: X minutes* and set the number of minutes that mails will automatically be saved. This is only applicable when the email isn't sent yet.

2.4.2. Inline images

From ZCP version 6.30.0 the WebAccess has the ability to add inline images in mail messages. To add an inline image, click on *Attachments* and select an image. If the 'HTML' format is being used (see *Compose mail in this format* in *Settings, Compose mail* tab), the inline image functionality is enabled. A light blue cross icon will appear beside the attachment as seen in *Figure 2.12, "Light blue cross icon to insert the image as a inline image"*. Click on the blue cross icon to insert the image in the mail body as shown in *Figure 2.13, "Example of an Inline Image"*. The inline image will inserted at the last cursor position.

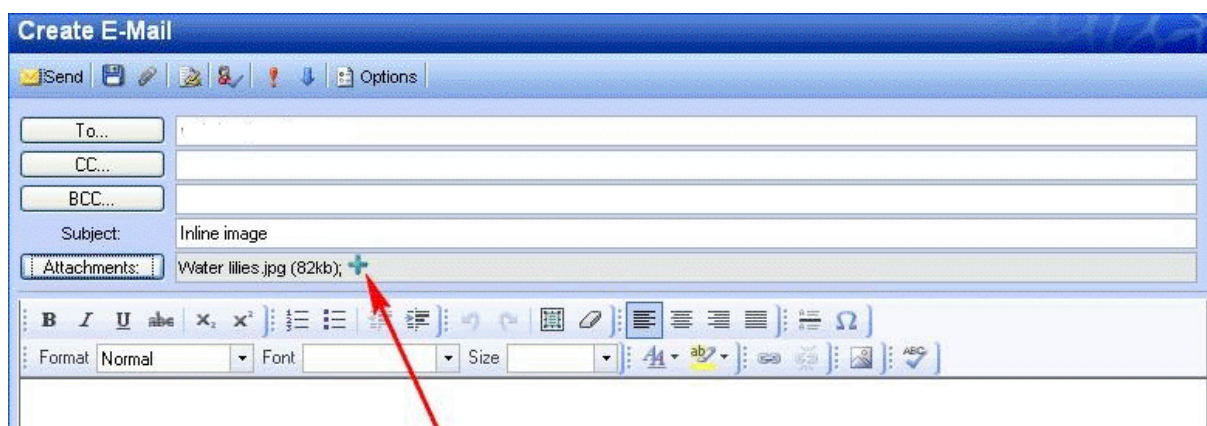


Figure 2.12. Light blue cross icon to insert the image as a inline image

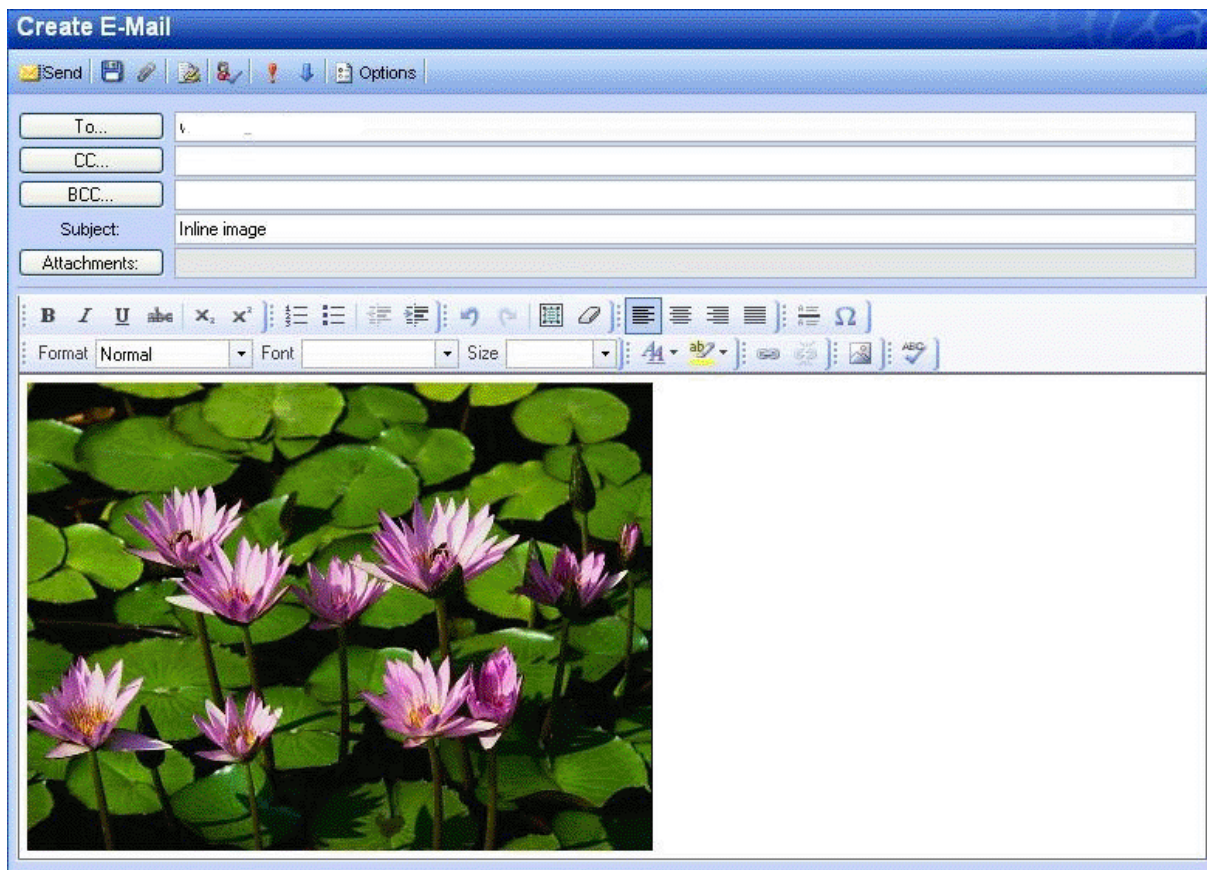


Figure 2.13. Example of an Inline Image

To change the image size, right click on the image and select *Image properties*. A popup like [Figure 2.14](#), “*Image properties editor*” will appear which enables the user to customize width and height of the image and options such as border and alignment.

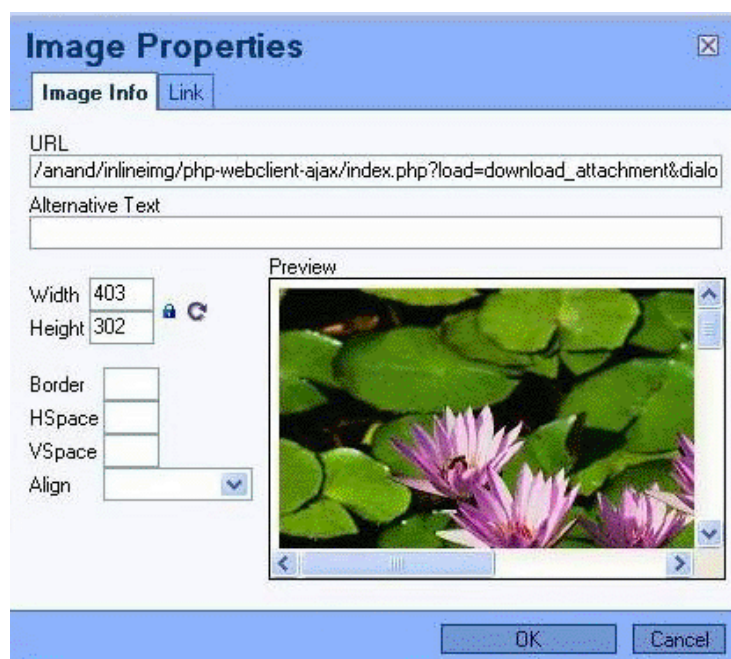


Figure 2.14. Image properties editor

It is possible to delete the inline image directly from the main body, as if it were text.

In some browsers it is possible to paste an image from your clipboard directly into the editor. This will embed the image into the source of the body and it means that it will not become an attachment. The image will be shown properly in Firefox and Internet Explorer 9, with limited support in Internet Explorer 8. In Outlook the image will not be visible properly.

2.4.3. Copy, move and delete email

The following screenshot (*Figure 2.15, "Context menu from a mail message"*) shows the context menu that shows up when clicking with the right mouse button on an email. Through this menu most copy, move and delete operations are performed. It also is possible to download a message as a file.

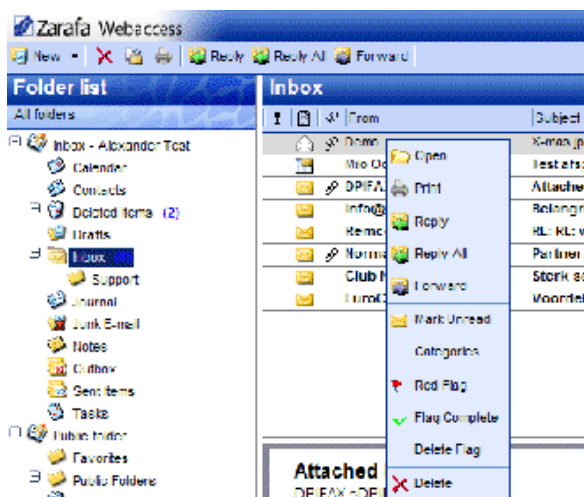


Figure 2.15. Context menu from a mail message

2.4.3.1. Delete email

There are several ways to delete email. They are:

- Via the delete button on the keyboard
- Via the delete button in the right mouse button menu (as shown in *Figure 2.15, "Context menu from a mail message"*)
- Via the red cross button in the top bar of the webaccess

2.4.3.2. Move email

To move a single items it is most convenient to simply drag the item to its new location. Place the mouse cursor over the item to be moved, click and hold the left mouse button. Continue to hold the button down while moving the mouse cursor until it is over the folder the message needs to be placed.

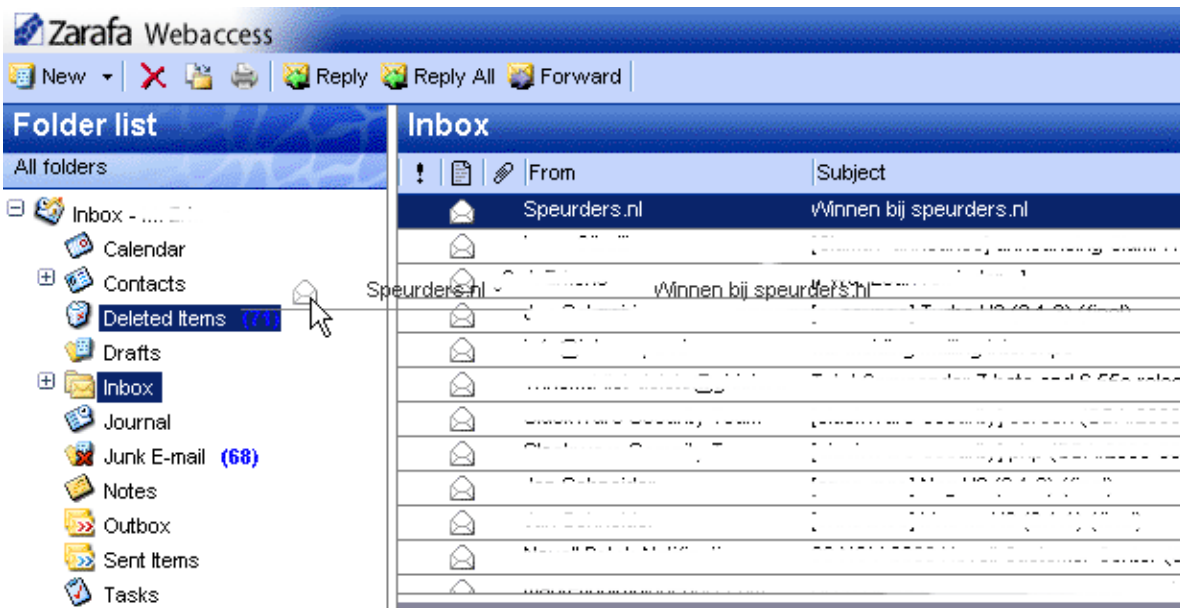


Figure 2.16. Moving Email

Notice that the folder names under the mouse cursor are highlighted while moving. This highlighting marks the folder where the message will be placed when releasing the button.

To move multiple items, first select all the items (only items that are currently visible can be moved). To select a range of items click on the first item and then press and hold the shift button on the keyboard. Before releasing the shift button, use the mouse to click on the last item in the range that needs to be moved. All items between the two items clicked on will become highlighted.

With items that are not consecutive, hold down the control (Ctrl) button on the keyboard while clicking on each item. To drag and drop these items, release the control button, place the mouse cursor on one of the selected messages, drag them into the designated folder.

Items can also be moved by clicking on the copy/move button as displayed in [Figure 2.17, “Copy/Move Button”](#).

It is also possible to drag and drop messages to the desktop. For more information about this feature, see [Section 2.14.1, “Zarafa Attachment Drag ‘n’ Drop Extension”](#).

2.4.3.3. Copy email

To copy an item, the drag-and-drop feature can not be used as it does not duplicate items. Instead use the copy/move button as shown in [Figure 2.17, “Copy/Move Button”](#). See the section above about moving multiple items for an explanation concerning how to select multiple items.



Figure 2.17. Copy/Move Button

2.4.3.4. Save Email as a File

From ZCP 6.50 up, it is possible to download messages directly from the Zarafa WebAccess to the computer. The *Save Email as a File* button located in the message context menu, as seen in [Figure 2.18, “Save Email as a File button”](#), should be used to do so.

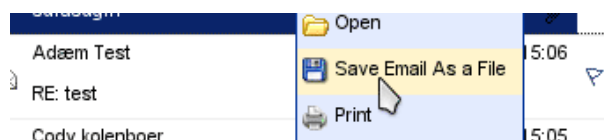


Figure 2.18. Save Email as a File button

2.4.3.5. Change email view

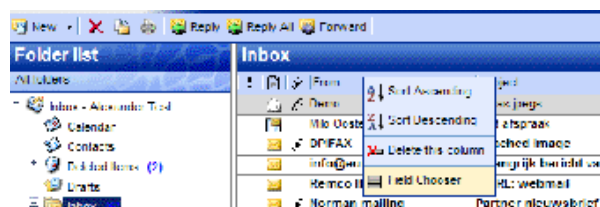


Figure 2.19. Context menu form a mail view column

In the Zarafa WebAccess, the email view has a default layout: a list of messages with a *From* and a *Received* column. However, like in Outlook, it is possible to change the view by adding or removing columns. To do so, use the right mouse button to click on the header of the list (for example on the *From* header field) and select the *Field Chooser* option from the context menu. A dialog that looks like [Figure 2.20](#), “*Field Chooser*” will pop up.

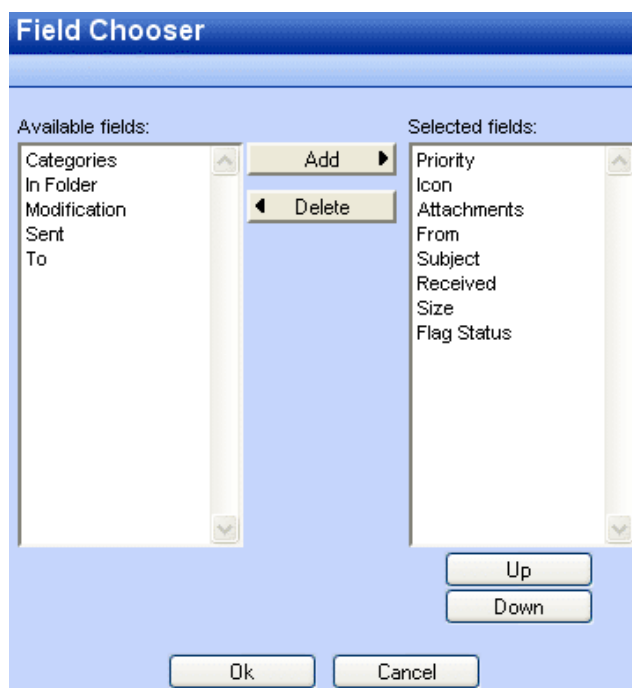


Figure 2.20. Field Chooser

Additionally, it is possible to sort the email list by selecting a specific column. By default email is sorted by the *Received* date column.

2.4.4. Searching

To search click the *Search* button in the tool bar. A search bar (see: [Figure 2.21](#), “*Searching Options*”) will then be added to the WebAccess view (to remove the search bar, click the *Search* button again).

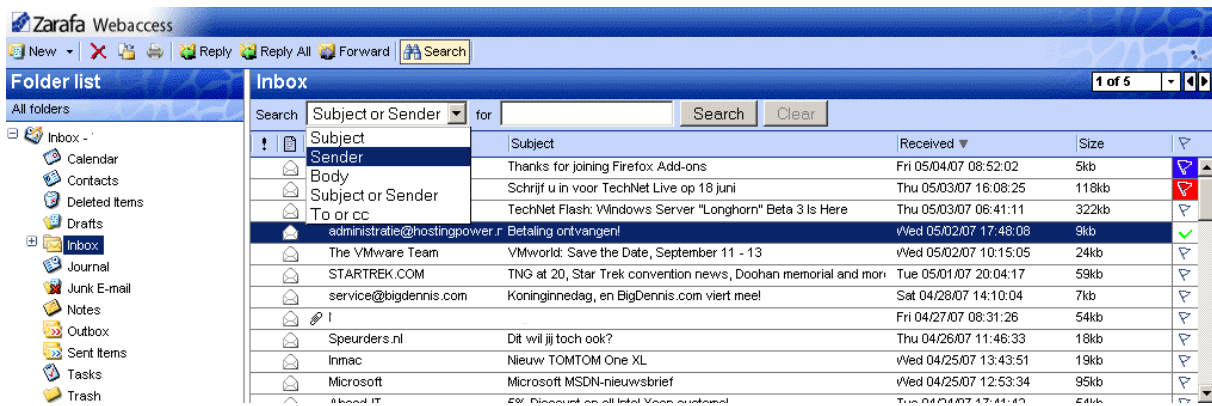


Figure 2.21. Searching Options

The search bar allows a user to enter a search query and choose where to search. For example, if a user remembers just a part of a message's subject, they can select *Subject* from the pull-down menu. After the query is keyed in, the user should click the *Search* button (binoculars icon) on the search bar, or press the enter key on the keyboard. As shown in Figure 2.22, "Search Result", the email list is updated with the results of the search query.

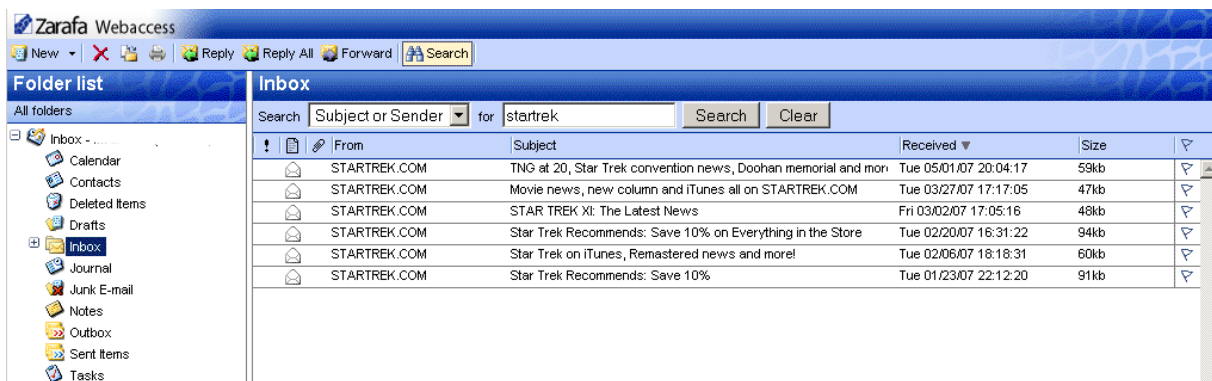


Figure 2.22. Search Result

When finished searching, press the *Clear* button (red circle icon) to return to the normal list view. To remove the search bar, click the *Search* button in the tool bar again.

Note

Archiving functionality is provided by the **Zarafa Archiver**, a product that is offered separately from ZCP.

2.4.5. Downloading Attachments

Attachments can be downloaded one by one, by right-clicking the attachment and selecting *Save target as*. From ZCP 6.50 up, it's possible to download all attachments from a message at once, in a compressed ZIP file, by clicking the *Download all Attachments* button, as seen in Figure 2.23, "Message Attachments".



Figure 2.23. Message Attachments

2.4.6. Attach items to mail

To add items as attachments or forward them as text message in body of composing mail.

1. Click on *Attach Items* button or *envelope with paper clip* icon (see: *Figure 2.24, "Attach Item Dialog"*).

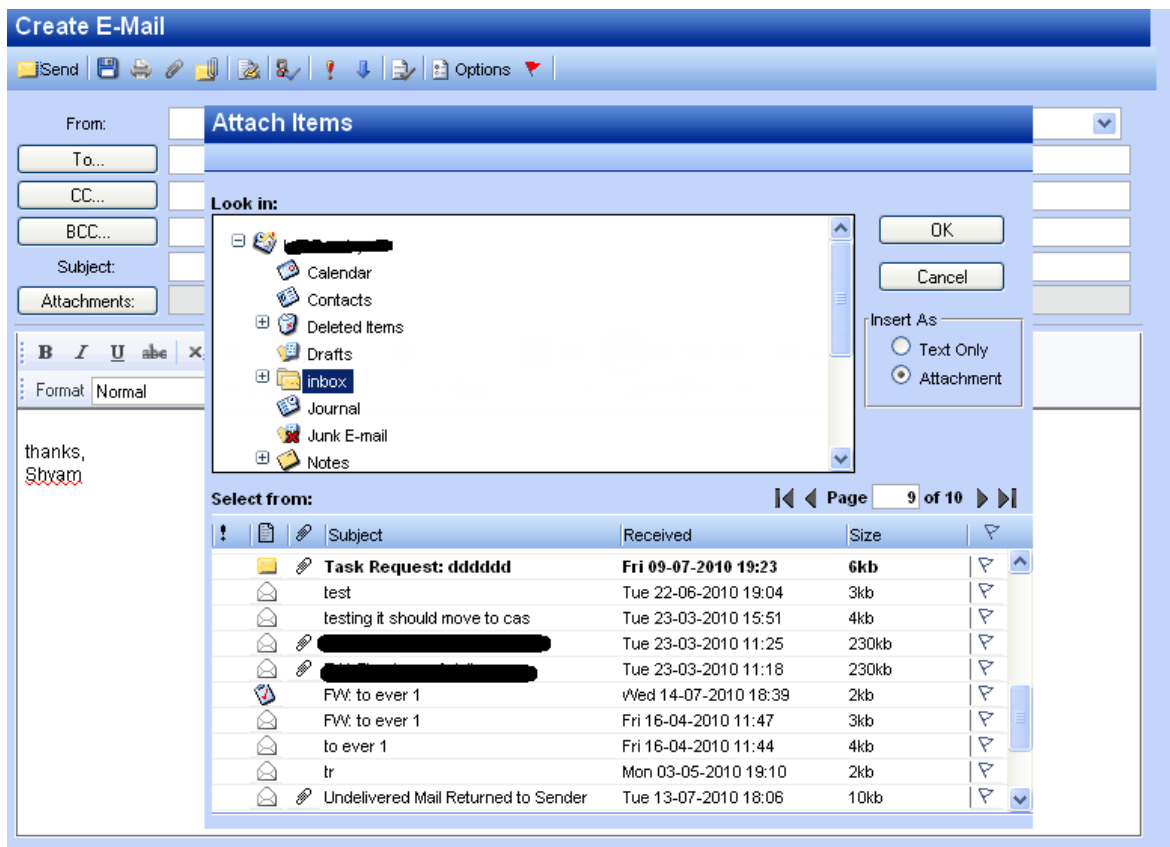


Figure 2.24. Attach Item Dialog



Note

It's possible to quickly forward e-mail messages as attachments. Right-click the Forward Items column in the message list.

2. Browse through the message list and select the items need which to be attached.

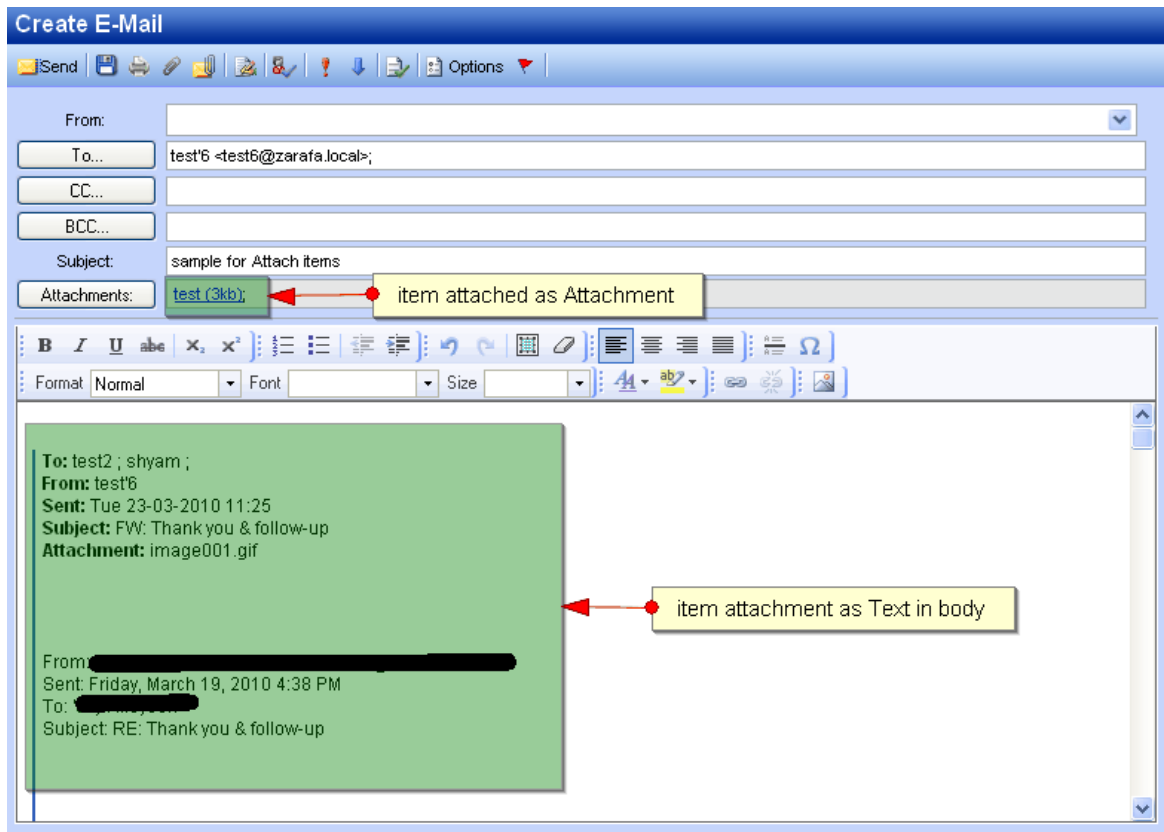


Figure 2.25. New Mail with message items added as attachment



Note

Items can be attached as Text or as Attachment, By selecting the check box as required, by default, items are added as Attachments.



Note

Items can be quickly attached by doing a double click on selected items.



Important

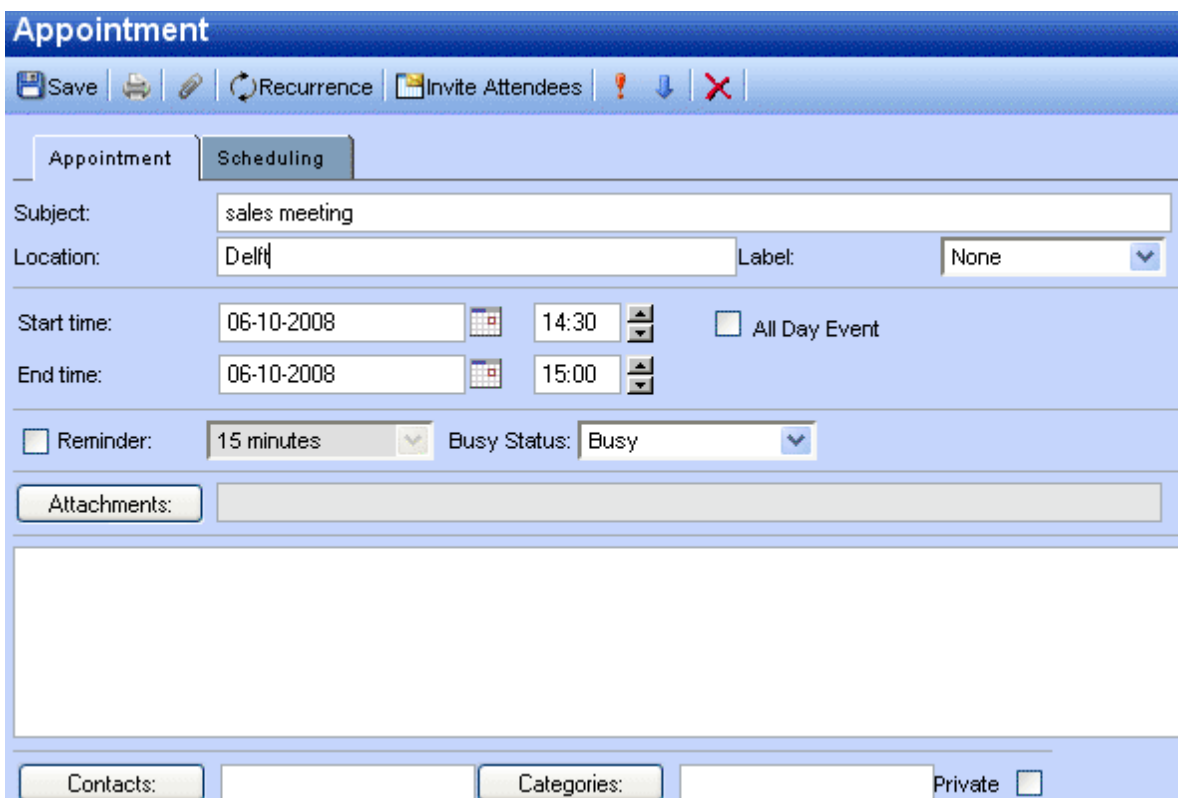
Attachments in the original e-mail are not forwarded with the new text message.

2.5. Calendar usage

2.5.1. Create new appointment with invitations and free/busy status

1. Select the folder Calendar.

2. Select the button *New* to create a new appointment. A dialog as shown in [Figure 2.26, “New Appointment”](#) pops up.



The screenshot shows the 'Appointment' dialog box with the following details:

- Title Bar:** Appointment
- Toolbar:** Save, Print, Edit, Recurrence, Invite Attendees, Close
- Tabs:** Appointment (selected), Scheduling
- Fields:**
 - Subject: sales meeting
 - Location: Delft
 - Label: None
 - Start time: 06-10-2008 14:30
 - End time: 06-10-2008 15:00
 - All Day Event:
 - Reminder: 15 minutes
 - Busy Status: Busy
 - Attachments: (empty)
 - Contacts: (empty)
 - Categories: (empty)
 - Private:

Figure 2.26. New Appointment

3. Insert a subject for the appointment, and optionally a location.
4. Select a start and end time for the appointment.
5. Optional: Enable the reminder option, this will trigger a reminder pop-up (see: [Figure 2.27, “Reminder dialog”](#)) before the appointment starts. The time interval between the reminder and the appointment is adjustable in the field next to the reminder option. When it is time for the reminder to pop-up, the Zarafa WebAccess shows a list of these reminders with buttons to *Open* the item, *Dismiss* the item, *Dismiss All* items or to *Snooze* the reminders by a given time.



Note

Pop-ups need to be allowed by the browser to see reminder pop-ups. Often this needs the domain name of the Zarafa WebAccess to be whitelisted for pop-ups in the browser.

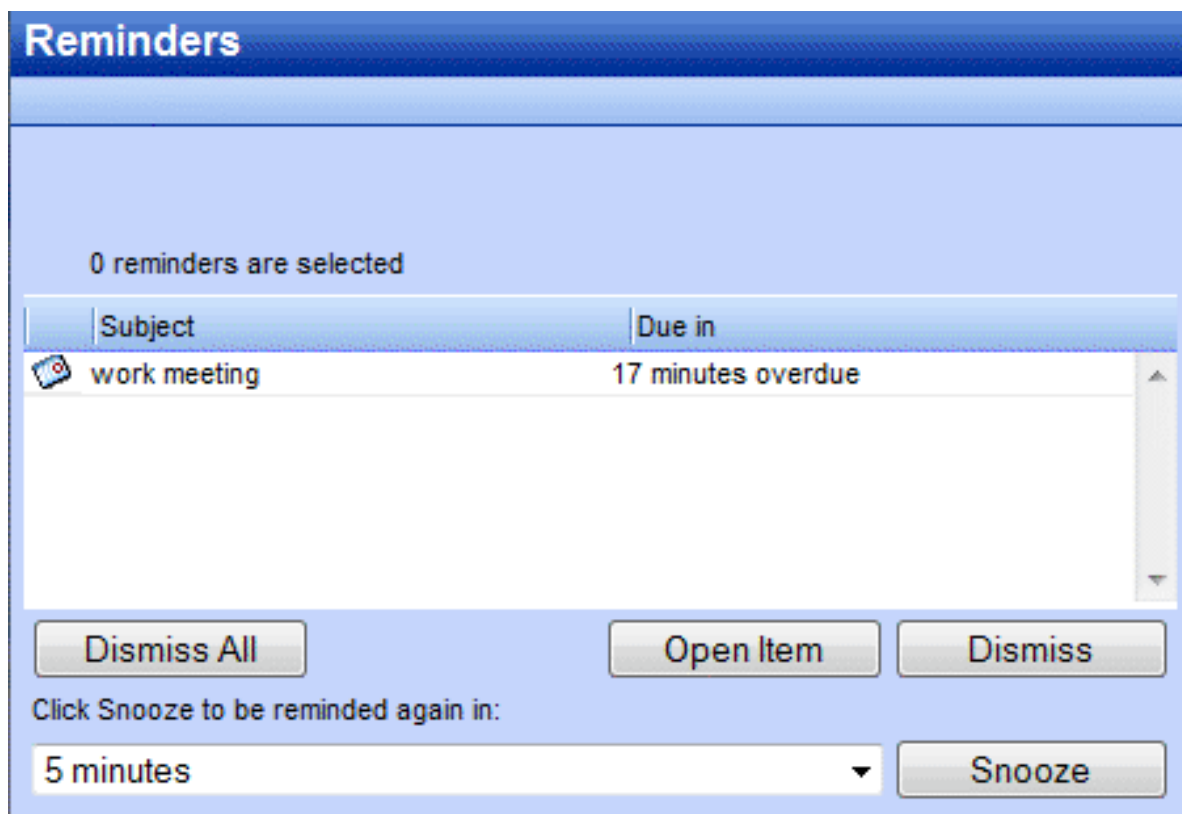


Figure 2.27. Reminder dialog

- Using the button *Invite Attendees* one can send a meeting request as shown in [Figure 2.28](#), *“Meeting request”*. To add attendees, simply add their email addresses. The email addresses need to be separated by a semicolon. By clicking the *To:* button contacts can be selected from the Address Book. The attendee will receive a meeting request which the attendee can *Accept*, accept as *Tentative* or *Decline*, alternatively the attendee can also *Propose New Time* for that request.

Meeting

Send Save Print Edit Recurrence Cancel Invitation

Appointment Scheduling

To: Lucas Test <Lucas@unit1.ztest.nl>

Subject: sales meeting

Location: Delft Label: None

Start time: 06-10-2008 14:30 All Day Event

End time: 06-10-2008 15:00

Reminder: 15 minutes Busy Status: Busy

Attachments:

Contacts: Categories: Private

Figure 2.28. Meeting request

- By opening the tab *Scheduling*, the free/busy times for multiple people are shown (see: [Figure 2.29, "Scheduling/FreeBusy"](#)). On this tab colleagues can be invited (*Add a name*); an overview is showing exactly when a specific person is busy, out of the office, or available. If an attendee has proposed a new date or time for a meeting, the proposals are shown on the *Scheduling* tab as well.

Meeting

Send Save Print Edit Recurrence Cancel Invitation

Appointment Scheduling

Proposed start date and time	Proposed end date and time	Duration	Proposed by
11-09-2008 15:00	11-09-2008 15:30	30 minutes	<Current Meeting Time>
11-09-2008 15:01	11-09-2008 22:01	7 hours	Hilde Test

Zoom 1 day Thu 11 Sep 2008

All Attendees

- Inge Test
- Hilde Test
- Hilde Test

Add a name

Start time: 11-09-2008 15:01

End time: 11-09-2008 22:01

Busy Tentative Out of office No Information

Figure 2.29. Scheduling/FreeBusy

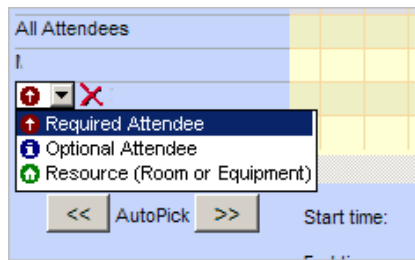


Figure 2.30. Meeting request

8. Colleagues can be added via the *Add a name* field.
9. Attendees can be marked either as “required” or as “optional”. It is also possible to schedule a resource — like a room or a piece of equipment — needed for that meeting.



Note

Resources have to be created by the administrator.

10. In the *Tracking* tab a list with all attendees for this appointment, with their responses, can be found.

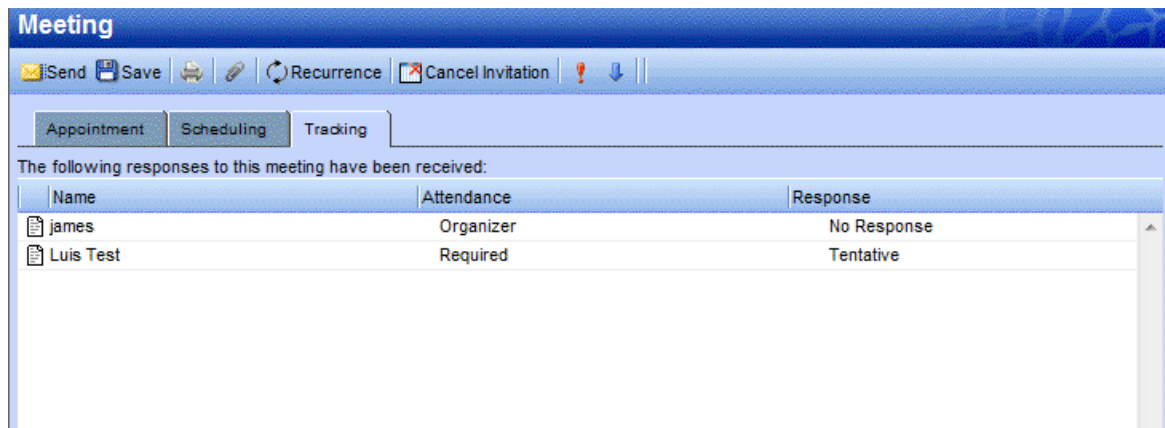


Figure 2.31. Tracking tab

2.5.2. Accept a meeting invitation

If someone invites you for a meeting, you will receive meeting invitation. At the top of the invitation a bar containing the buttons *Accept*, *Tentative*, *Decline* and *Propose New Time* is shown for sending a response to the owner of the appointment. See [Figure 2.32, “Meeting invitation buttons”](#).



Figure 2.32. Meeting invitation buttons

By clicking *Propose New Time* a user can propose a new date or time to the owner. The owner, upon receiving the proposal, can either accept it or decline it.

2.6. Multiple calendar views

The Zarafa WebAccess calendar has five different views:

- Day view
- Workweek view
- Week view
- 7 day view (like the workweek view, but with 7 days)
- Month view

Views can be switched via the four buttons in the tool bar.

The date picker is used to move the view to another day/week/month, which is at the top right of the screen when the calendar is opened.

2.6.1. Move/delete appointment

2.6.1.1. Move appointment

An appointment can be moved to another time/date by selecting the item and dragging it to the new date and time. Alternatively, (for instance if the new date is not in the current view) an appointment can be opened (either by double clicking on it or by right clicking on it and choosing the *Open* option), which presents a dialog where the new date and time can be set.

2.6.1.2. Delete appointment

Appointments are deleted by the delete button in the context menu that shows when clicking on an appointment with the right mouse button. Alternatively, one can use the *Delete* button in the tool bar, or the *Del/Delete* key on the keyboard.

2.7. Multi User Calendar

Opening other users calendars side-by-side is possible with the Multi User Calendar (see [Figure 2.33](#), "*Multi User Calendar*"): click on the *Open Multi User Calendar* link in the bottom of the folder pane.



Note

This feature is not available in the community version of Zarafa.

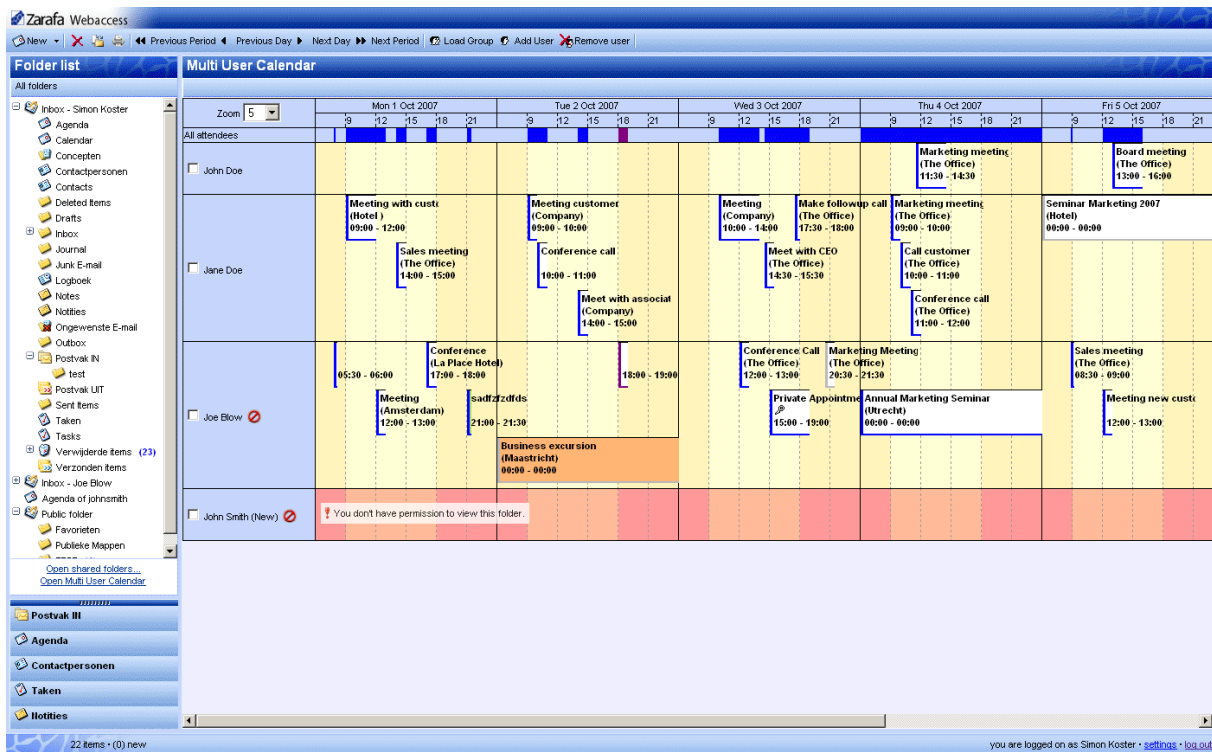


Figure 2.33. Multi User Calendar

2.7.1. Adding a user to the time line

1. Click on the *Add User* button in tool bar at the top (see: [Figure 2.34, "Timeline"](#)). The Address Book window will open.

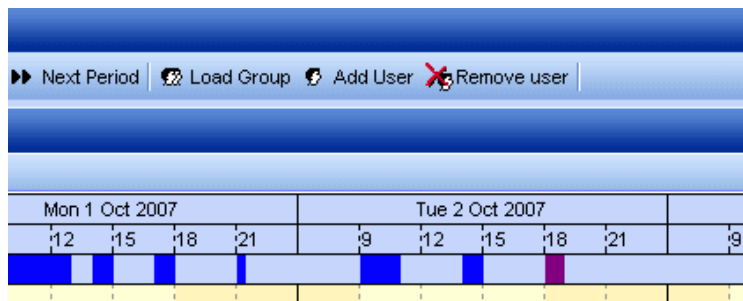


Figure 2.34. Timeline

2. Click on a user to select that person and click on the button *Ok*.
3. The user is added to the time line and his/her appointments are loaded.

2.7.2. Deleting a user from the time line

Select the user by clicking on the check box in front of their name. Click on the button *Remove User* in the tool bar at the top.

2.7.3. Loading a group of users to the time line

1. Click on the button *Load Group...* in the bar at the top. The "Group Window", as shown in [Figure 2.35, "User groups"](#), will open.

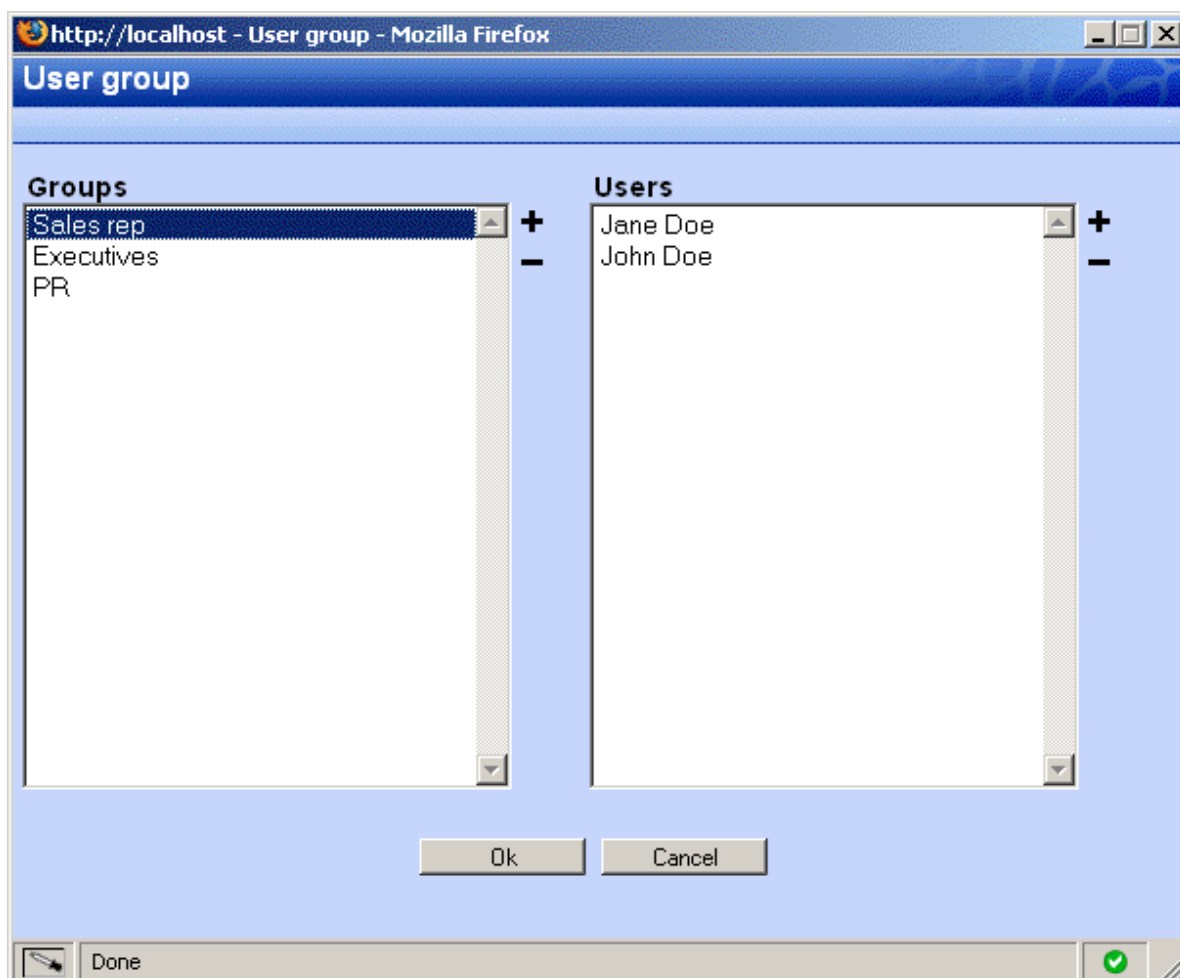


Figure 2.35. User groups

2. Select a group in the left list and click on the button *Ok*.
3. The group of users is added to the time line and their appointments are loaded per user.

2.7.4. Load group dialog

The *Load Group* dialog can be opened by clicking on the button *Load Group* in the bar at the top.

The dialog consists of two lists. The list to the left shows the different groups that have been created. The list to the right displays all the users that are members of a particular group when that group has been selected from the left list.

To add or delete a group or user use respectively the plus or minus buttons on the right side of the list. Remember that a group must be selected prior to adding or removing a user.

2.7.5. No Access message

When using the Multi User Calendar with several calendars of colleagues open, one might not have permission to create appointments for a colleague, or not have permission to view the content a colleague's calendar at all. In case one does not have permission to create an appointment for a colleague, an icon is placed after the colleague's name as an indicator. In case one has no access to the calendar at all, the entire time line for that user is marked red and a warning message appears as shown in [Figure 2.36, "No Access message"](#).

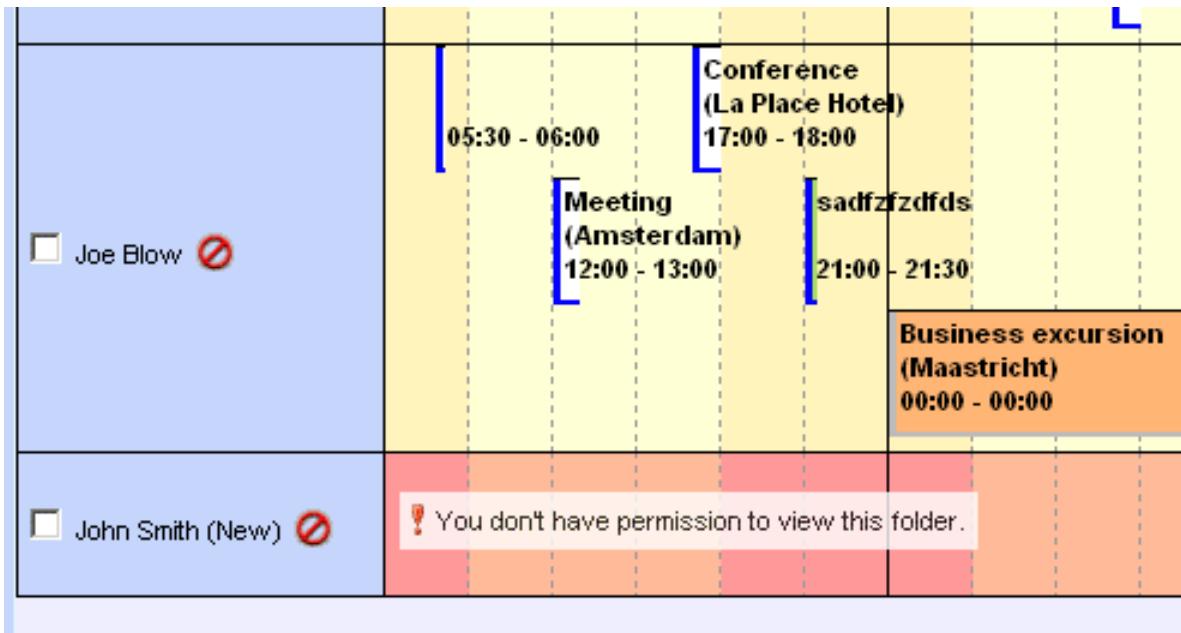


Figure 2.36. No Access message

2.7.6. Cumulative free/busy information

The row directly above the time lines (see: [Figure 2.37, “Free busy information for all attendees”](#)) contains the cumulative free/busy information of all users loaded in the Multi User Calendar. The bar also shows whether the appointments are set as *Tentative*, *Busy* or *Out of Office*.

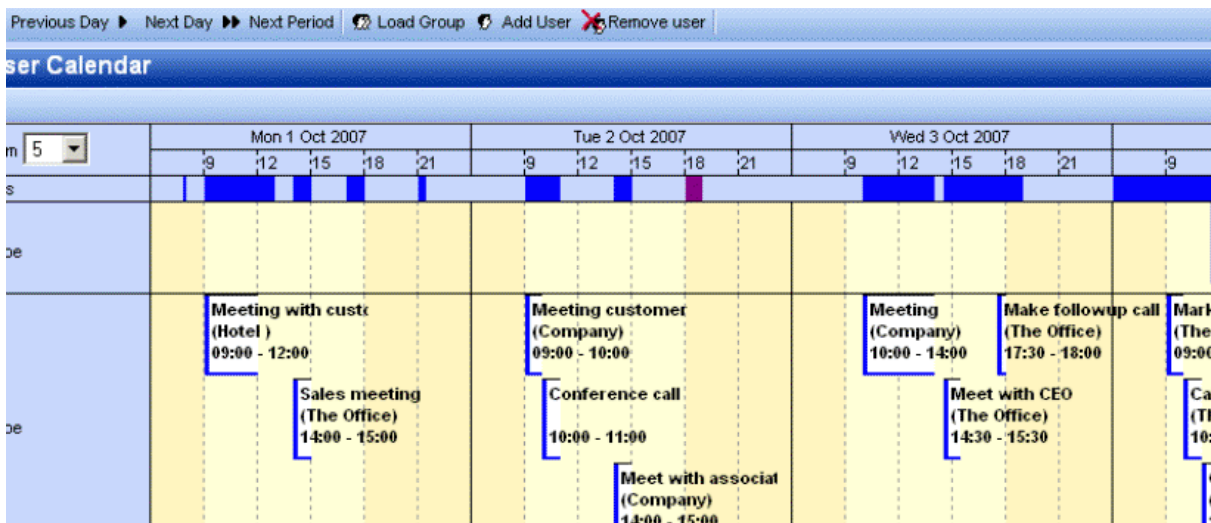


Figure 2.37. Free busy information for all attendees

2.7.7. Create or delete an appointment

To create an appointment simply double click on the time line of the user an appointment has to be created for. This will open a new appointment window where the appointment can be created.

To delete an appointment: double click on the appointment to open it, then use the red cross in the toolbar of the appointment dialog to delete it.

2.7.8. Moving appointments

Moving an appointment can be achieved by opening the appointment and changing the start time. In practise most users will prefer moving appointments by using drag-and-drop. To drag an appointment the user clicks and hold down the left mouse button on an appointment and moves (drags) the mouse over the time line to the desired location, to release the mouse button at that point. To help place the appointment a red overlay (see: *Figure 2.38, "Dragging appointments"*) follows the mouse to indicate new place of the appointment when the mouse is released at that point.

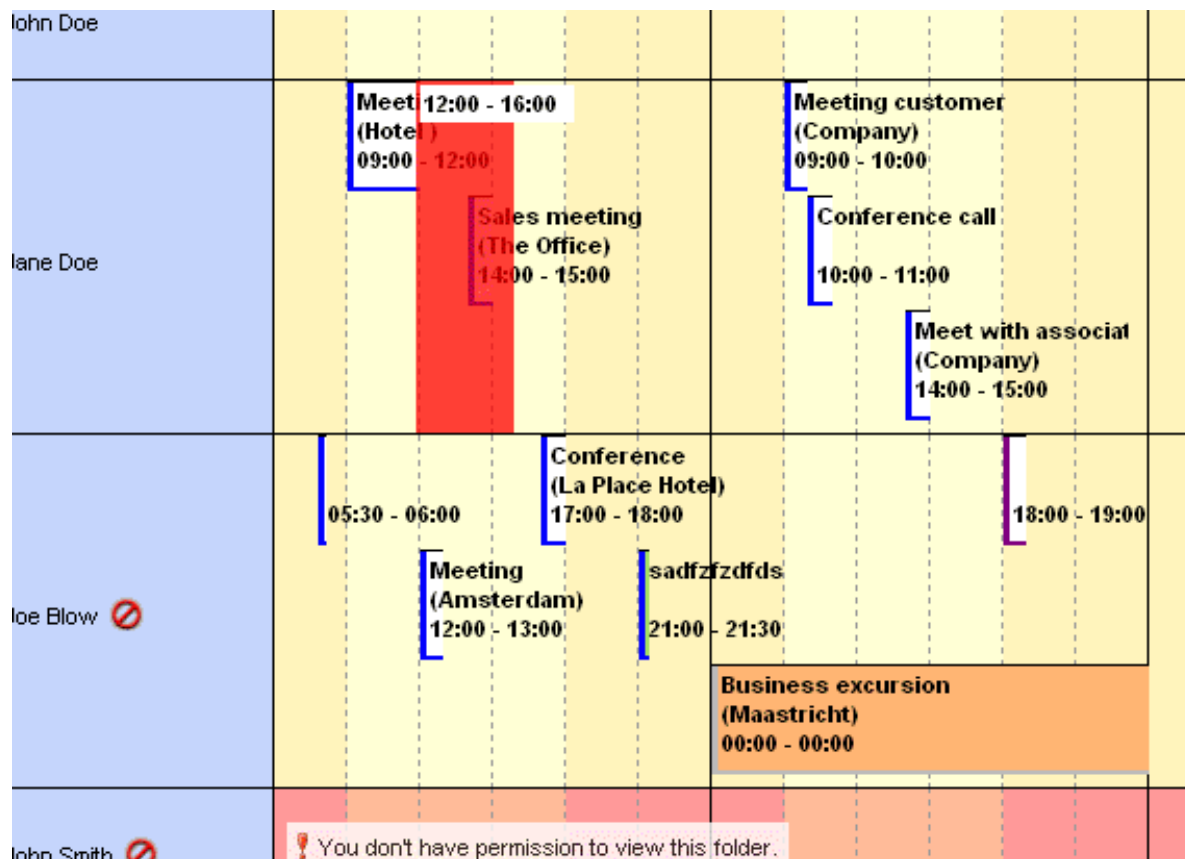


Figure 2.38. Dragging appointments

It is also possible to drag an appointment to the store of another user (provided enough permissions are granted). Simply move the mouse to another user's row and the red overlay will follow.

2.7.9. Changing zoom level

It is possible to quickly zoom in on the time line by changing the zoom level using the drop down menu (see: *Figure 2.39, "Zoomlevel"*) in the top left corner of the Multi User Calendar. This setting is not saved and will be reset to the default setting (as set in the settings dialog) next time the Multi User Calendar is opened.

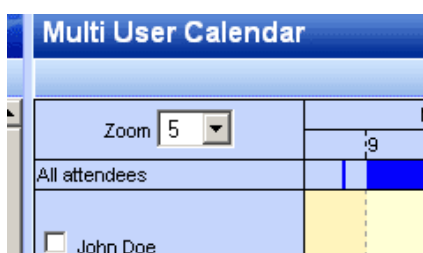


Figure 2.39. Zoomlevel

2.7.10. Changing number of displayed days

The number of days that are loaded in the time line and the number of days that are visible at the same time (zoom level) can be set from the settings dialog: on the *Calendar* tab in the *Multi User Calendar View* section. These settings will be used whenever the Multi User Calendar is opened.

2.7.11. Browse time period

The *Previous Period* and *Next Period* buttons on the tool bar at the top of the page (see: [Figure 2.40](#), "*Buttons for changing time period*") are used to view the next of the previous time line period. The *Previous Day* and *Next Day* buttons merely move the time line by a single day.



Figure 2.40. Buttons for changing time period

2.8. Tasks

In the task folder a to-do list can be created and managed. A task is created with the following steps:

1. Select the folder *Tasks*
2. Use the button *New* to create a new task. A *New Task* dialog will be opened as shown in [Figure 2.41](#), "*New task window*".

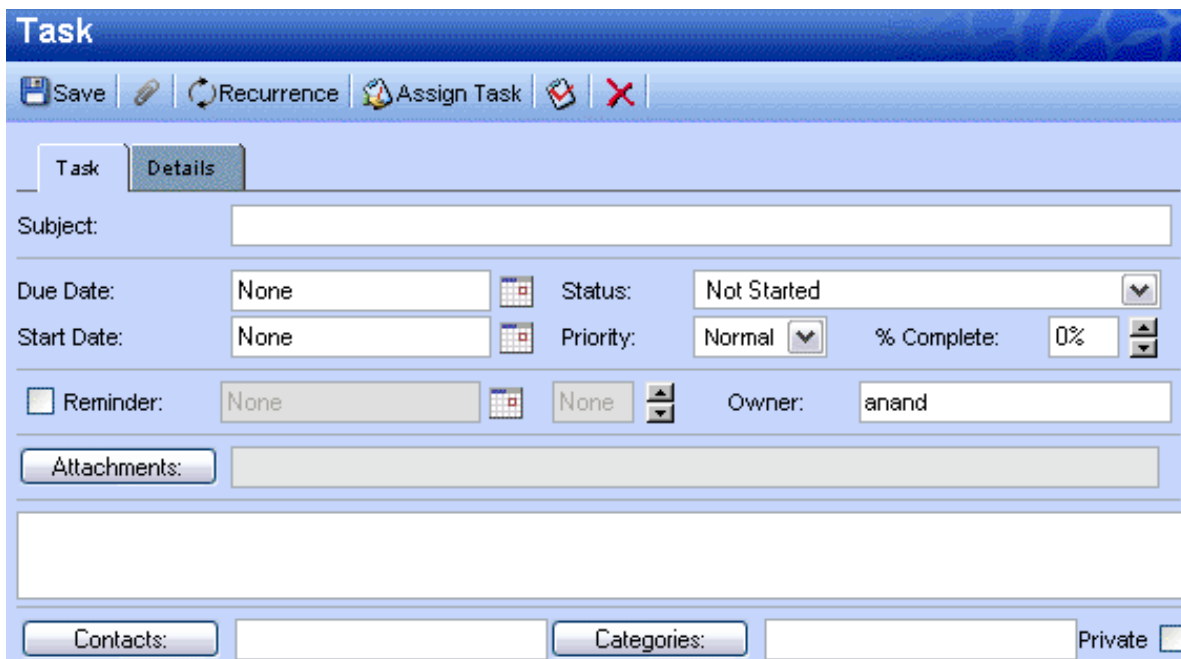


Figure 2.41. New task window

3. Fill in the preferred fields. The fields in this window are comparable with those in the *New Appointment* dialog.
4. Use the *Save* button to confirm. The task can now be found in the task overview.

Alternatively, new tasks can be created directly from the *Tasks* overview (see: [Figure 2.42](#), "*Task overview*"). Right below the tool bar the fields for creating a new task as shown. Simply enter the field for a new task directly into these empty field and save it with the ENTER key.

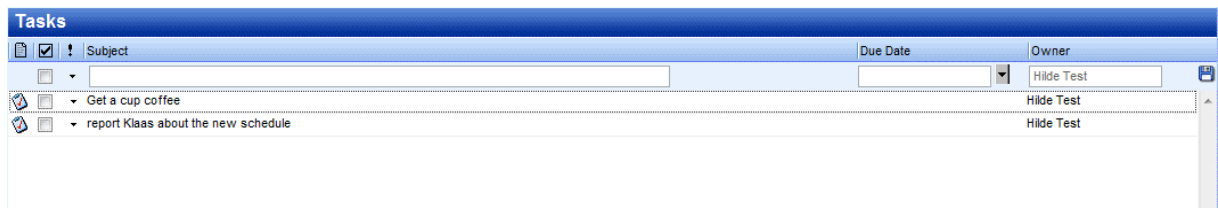


Figure 2.42. Task overview

2.8.1. Recurrence in Tasks

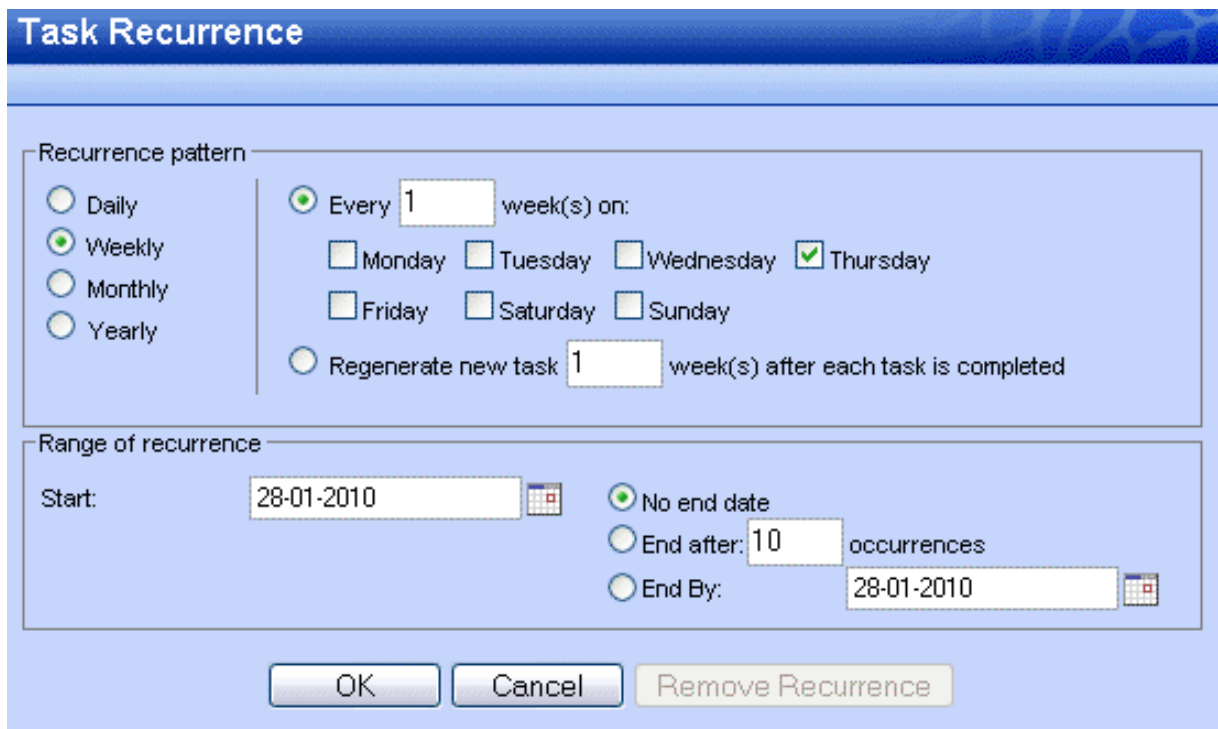


Figure 2.43. Task Recurrence

2.8.1.1. Add/Change Recurrence in a Task

Only the owner of a task can change the task in a *recurring* task.

1. Select *Recurrence* from menu in task dialog shown in [Figure 2.41](#), “*New task window*”. This pops-up a recurrence dialog as shown in [Figure 2.43](#), “*Task Recurrence*”.
2. Select the frequency (**Daily**, **Weekly**, **Monthly**, **Yearly**) of recurrence.
3. To specify when the task repeats, do one of the following:
 - **Repeat the task at regular intervals:** Click on options given on the right-side of Recurrence pattern to recur the task on specific intervals
 - **Repeat task at interval after the date it is completed:** Click *Regenerate new task* and fill the interval in the box.



Note

Recurring tasks appear one at a time in the task list. When user marks one occurrence of the task complete, the next occurrence appears in the list.

2.8.1.2. Remove Recurrence from a Task

1. Open the recurring task
2. Click *Recurrence* from menu in task dialog.
3. Click *Remove Recurrence* as shown in *Figure 2.43, "Task Recurrence"*

2.8.2. Task Requests

In addition to creating tasks for oneself, a user can assign tasks to others by sending them a task requests.

The screenshot shows the 'Task Request' dialog box in Zarafa WebAccess. The title bar is blue and says 'Task'. Below it is a toolbar with icons for 'Send', 'Recurrence', and 'Cancel Assignment'. The main area has tabs for 'Task' and 'Details'. There are input fields for 'To:', 'Subject:', 'Due Date:', 'Start Date:', 'Status:', 'Priority:', and '% Complete:'. There are also two checked checkboxes: 'Keep copy of task in task list.' and 'Send me a status report when task is completed.'. At the bottom, there are 'Attachments:', 'Contacts:', 'Categories:', and a 'Private' checkbox.

Figure 2.44. Task Request

2.8.2.1. Assign a task to someone

1. Click *Assign Task* from menu in task dialog as shown in *Figure 2.41, "New task window"*. This will show Task request fields as shown in *Figure 2.44, "Task Request"*.
2. Enter user address in the *TO* field. The user's address can also be resolved either by clicking *Check Names* button in menu or from *Suggestion List* which pops-up while typing user's name.
3. Select or clear the *Keep an updated copy of this task on my task list* check box and the *Send me a status report when this task is complete* check box.
4. Type instructions or information about the task in the body.

5. Click *Send*



Note

If a recurring task is assigned, a copy of task is created in task list but it won't be updated. If *Send me a status report when this task is complete* check box is selected, a status report will be received for each completed occurrence of the task.

2.8.2.2. Accept or decline a task request

1. Open the task or task request.
2. Click *Accept* or *Decline*.

2.8.2.3. Reclaim ownership of a declined task

1. Open the task that contains the decline task request
2. Click *Return to Task List*

2.9. Contacts

The *Contacts* folder has multiple views: card view and list view. Switching between views is done with the buttons on the tool bar.

Emails can be send directly to contacts by the right mouse button context menu option *Email Message*.

The letters at right side of the contact view allow users to quickly move through the contact list.

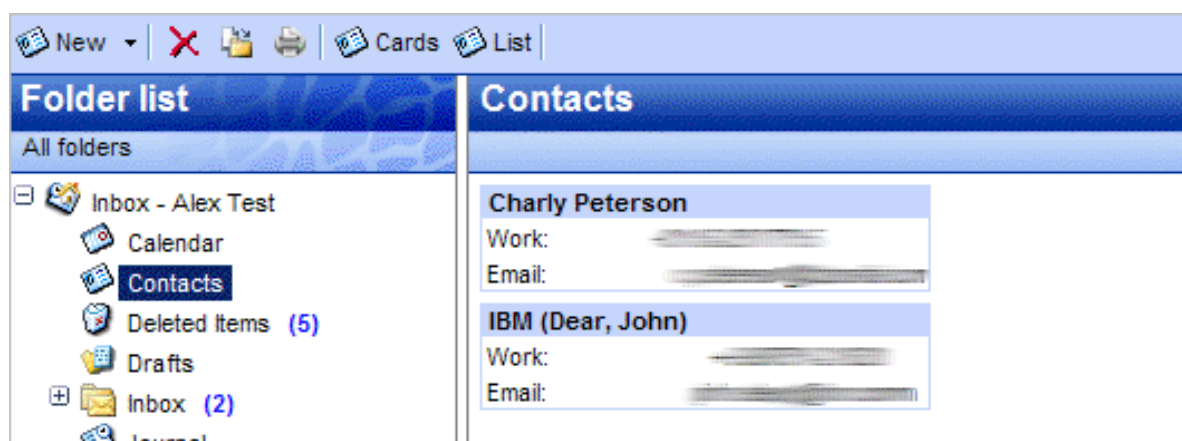


Figure 2.45. Contacts

2.9.1. Create new contact

A new contact is created with the *New* button in the tool bar, when the viewing the *Contacts* folder.

The *New Contact* dialog is then shown allowing a user to fill in all the information about a contact before it is saved with the *Save* button.

With the option *Private*, in lower right corner of the *New Contact* dialog, the contact can be hidden from colleagues that have access to that *Contacts* folder.

2.9.2. Detailed Contacts

Since ZCP version 6.30 the WebAccess provides a detailed dialog for contacts as shown in [Figure 2.46, "Details of a contact"](#).

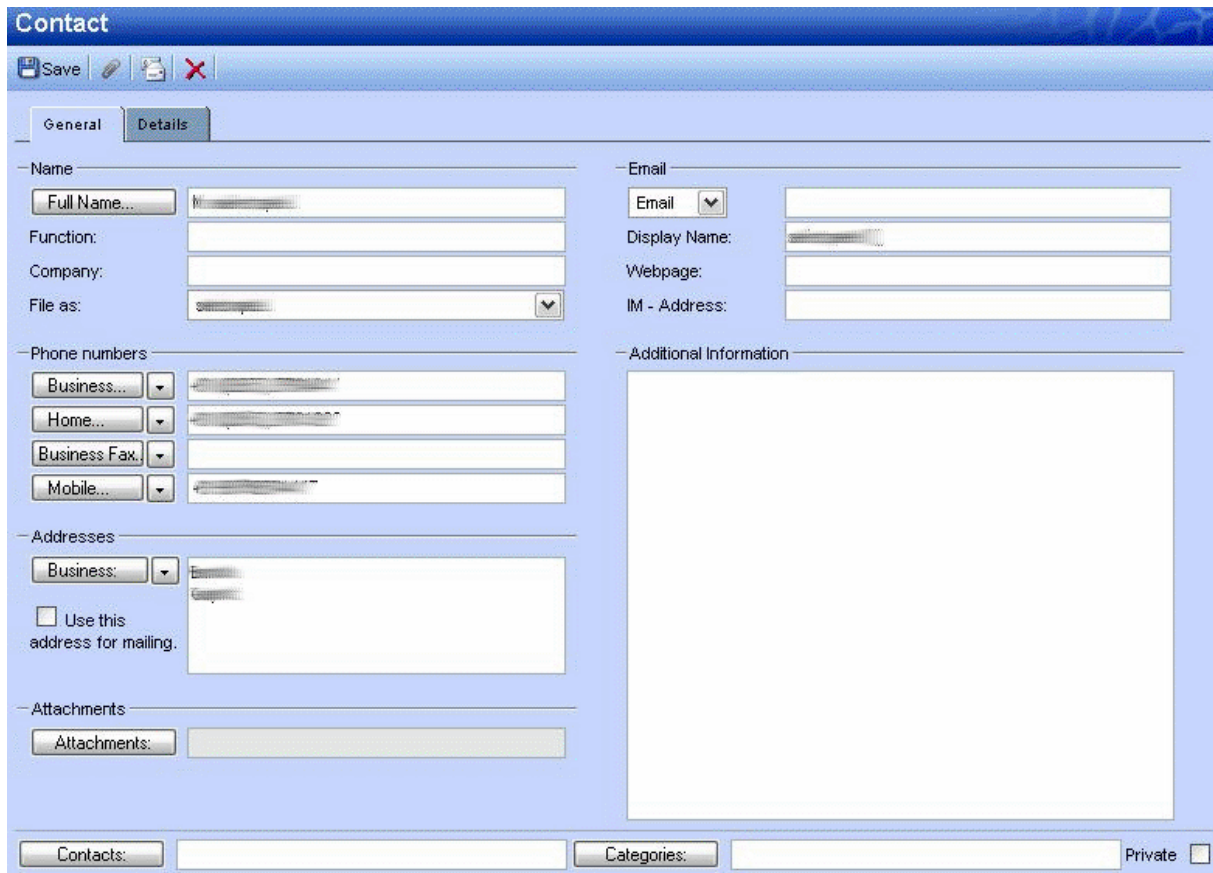


Figure 2.46. Details of a contact

In the Contact window, buttons are available instead of labels; click a button to show the details for that particular field. Screenshots of the detailed dialog boxes for *Full Name* ([Figure 2.47, "Name details dialog"](#)), *Phone Number* ([Figure 2.48, "Phone details dialog"](#)) and *Address* ([Figure 2.49, "Address details dialog"](#)) are shown below.



Figure 2.47. Name details dialog



Phone details

Country/Region Code: +31

City/Area code: 015

Local number: 123456

Extension:

Ok Cancel

Figure 2.48. Phone details dialog



Address details

Street: Hoofstraat 69

City: Delft

State/Province: Zuid-Holland

ZIP/Postal code: 2524HT

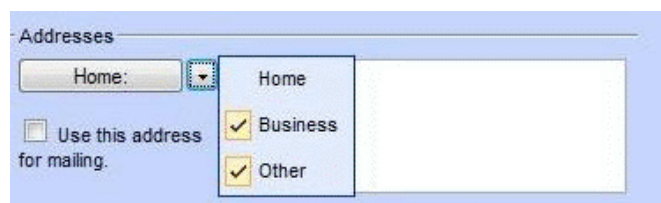
Country/Region: Netherlands

Show this again when address is incomplete or unclear

Ok Cancel

Figure 2.49. Address details dialog

There are three types of address fields (*Home*, *Business* and *Other*). The drop down menu shown in [Figure 2.50, “Cascade menu to choose the address type”](#) is used to change between these addresses. In this menu, ticks are shown besides the address types indicating which addresses have been entered already.



Addresses

Home: Home

Use this address for mailing. Business

Other

Figure 2.50. Cascade menu to choose the address type

Different types of *Phone Number* fields are available in the Zarafa WebAccess. To change the *Phone Number* type use menu shown in [Figure 2.51, “Cascade menu to choose the phone type”](#). In this menu, ticks are shown besides the address types indicating which phone number types have been entered already.

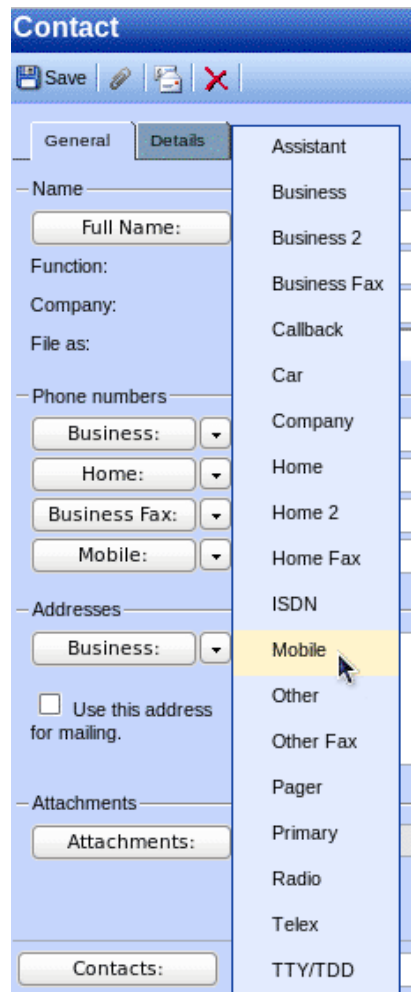


Figure 2.51. Cascade menu to choose the phone type

2.10. Distribution Lists

Sending a mail to a distribution list is done in the same way as sending a mail to a single contact. Simply select the distribution list from the address list when adding entries to a *TO*, *CC* or *BCC* field. After selecting the distribution list, all mailaddresses will be placed in the chosen header field.

2.10.1. Creating new distribution lists

Select the *Contacts* folder the new distribution list has to be created in. Select the option *Distribution List* from the *New* button on the tool bar. A dialog as shown in [Figure 2.52](#), “*New Distribution list window*” will open.

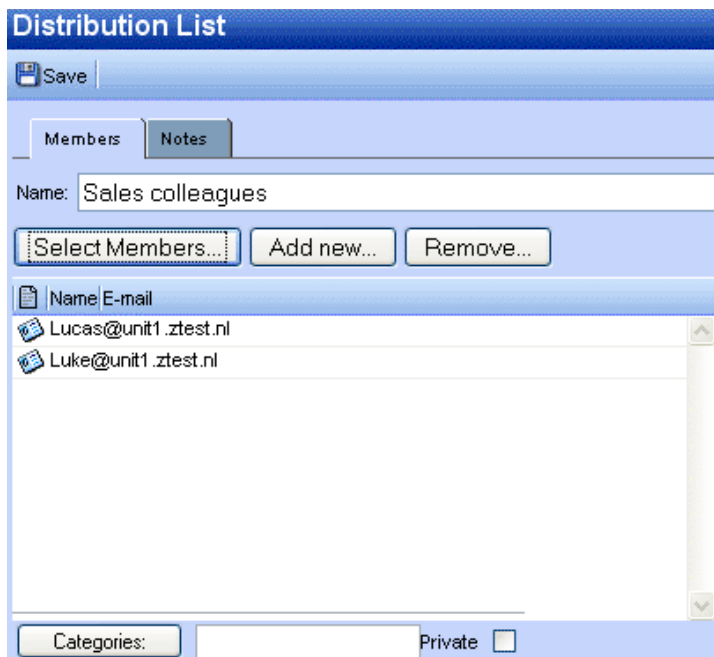


Figure 2.52. New Distribution list window

With the button *Select Members* contacts can be selected from the *Address Book* to add to the distribution list. Alternatively, the *Add new* button can be used to create a new contact that is added to the distribution list immediately.

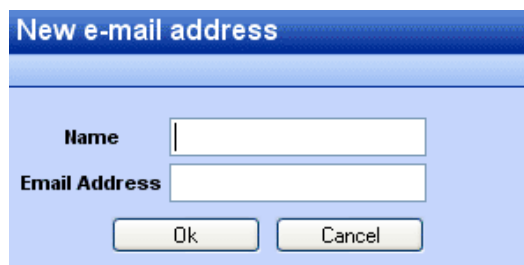


Figure 2.53. Add new address dialog

With the button *Remove* selected contacts are removed from the distribution list. Contacts are selected by single clicks in the lower part of the dialog.

Notes can also be added to the distribution list from the *Notes* tab.

2.11. Public Folder Favourites

The *Favourite* folder, located under the *Public Folders*, is a place where shortcuts to often used public folders can be stored. To add a public folder to the favourites, right click on that public folder and select *Add to favourite folder*. A dialog as shown in [Figure 2.54, "Add to favorite folder window"](#) will appear. It asks: "Fill in a name for the favourite folder (by default the same name will be given to the folder)". By default only the selected folder will be inserted in the favourite folder without subfolders (unless specified otherwise).

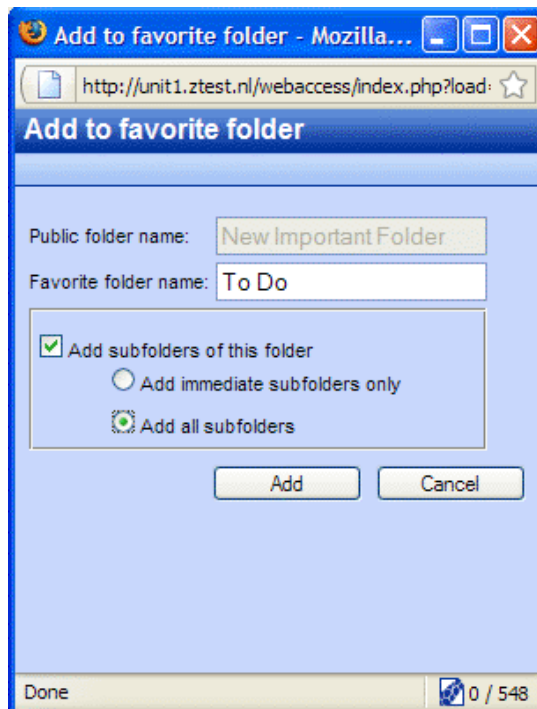


Figure 2.54. Add to favorite folder window

2.12. Rules

Rules automatically perform actions on incoming messages based on certain criteria, they can move, copy, delete or forward the message. When a message is delivered the rules are applied directly on the Zarafa Server, so a user does not have to be logged in to execute the rules.

To create or edit rules, first open the *Rules* dialog by clicking on the *Rules* button in the tool bar (see: [Figure 2.55, "Rules button"](#)). This button only shows when a mail folder is opened.



Figure 2.55. Rules button

A dialog as shown in [Figure 2.56, "Rules overview dialog"](#) is presented. In this dialog a user's rules can be created, modified or deleted. It is also possible to change the order in which the rules are applied. To change the order of a rule select it and click the *Up* or *Down* button.

To disable a rule without deleting it, click the checkbox in front of that rule. Only checked rules will be executed upon the arrival of new mail. After checking or unchecking rules, click the *Ok* button to save the changes to the server.

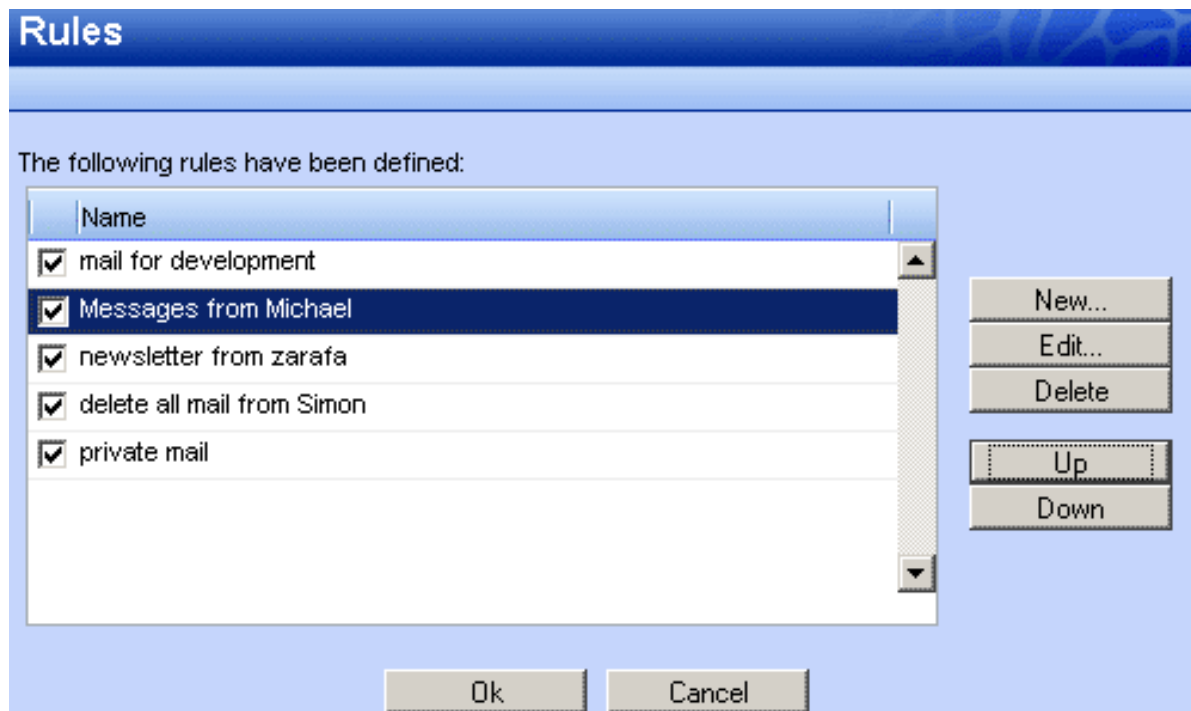


Figure 2.56. Rules overview dialog

To create a new rule, click the *New* button in the *Rules* dialog. The dialog as shown in [Figure 2.57](#), "*Add/edit rules dialog*" is presented. This is the same dialog as the dialog for editing rules which is opened by selecting a rule from the *Rules* dialog and clicking the *Edit* button.

Figure 2.57. Add/edit rules dialog

In the *Rule name* field a short description of the rule — to identify it in the rules overview dialog — can be provided. Below the *Rule name* field the criteria of the rule are specified. The incoming message can be matched by sender address, by subject, by the priority it has, by the recipient address, or based on if the message has “only been sent to me”. These criteria can be combined to match messages more specifically. The buttons behind the input fields to open the *Address Book* to select an email address.

 **Important**

All the criteria filled in must be fulfilled in order for an email to be seen as matching the rule.

While it is possible to combine the **Sent to* Contact or distributionlist* and the *Sent only to me* criteria, they can potentially contradict each other thereby rendering the rule useless.

Finally the action must be picked. This speaks for itself. When setting the *move* or *copy* action, the destination folder must be specified by clicking on the underlined text.

When finished close the dialog by clicking the *Ok* button. To save the rule, the *Rules* overview dialog **must also be closed** by clicking *Ok*.

2.13. Settings

In the bottom-right corner of the Zarafa WebAccess, to the left of the *log out* link, resides a *settings* link by which the *Settings* dialog can be opened. The *Settings* dialog contains 6 tabs, the following sections cover each of the tabs.

2.13.1. The “Preferences” tab

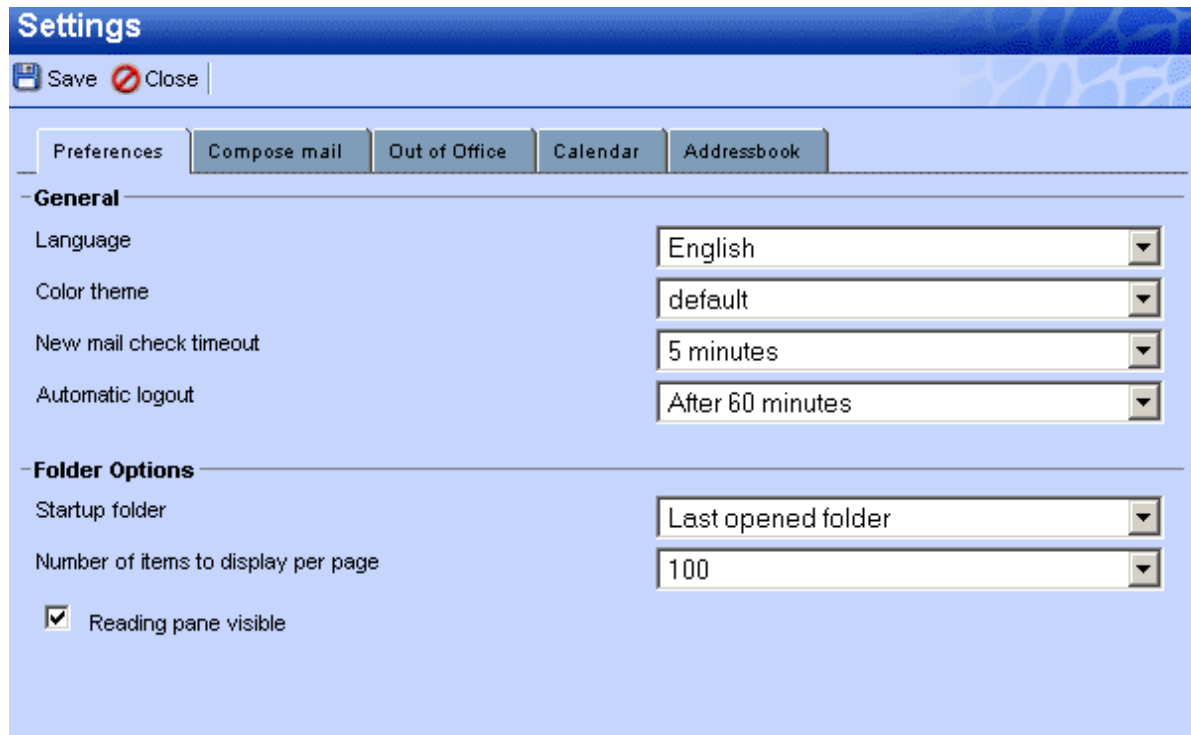


Figure 2.58. Settings: Preferences

- *Language*, sets the default language for the WebAccess.
- *Color theme*, pick one of *silver*, *white* and the *default* (blue).
- *Automatic logout*, use this option to increase security and set the WebAccess to logout automatically if it goes unused for the specified amount of time.
- *Startup folder*, the folder that is displayed when logging in to the WebAccess.
- *Number of items displayed per page*.
- *Reading pane visible*, if and where the preview pane for emails should be located. Pick one of *Right*, *Bottom* or *Off*.
- *New mail check timeout*, by default the WebAccess will check every 5 minutes for new email.
- *How to respond to requests for read receipts*, pick on the the options.
- *Edit Delegates...*, opens a dialog for choosing which users are allowed to be the current user's delegates. Delegates are allowed open the current user's store, and send messages --emails or (responses on) meeting requests-- on his behalf.

- *Results refresh every (X) seconds*, how often (if at all) the results of advanced searches should be refreshed.

2.13.2. The “Compose mail” tab

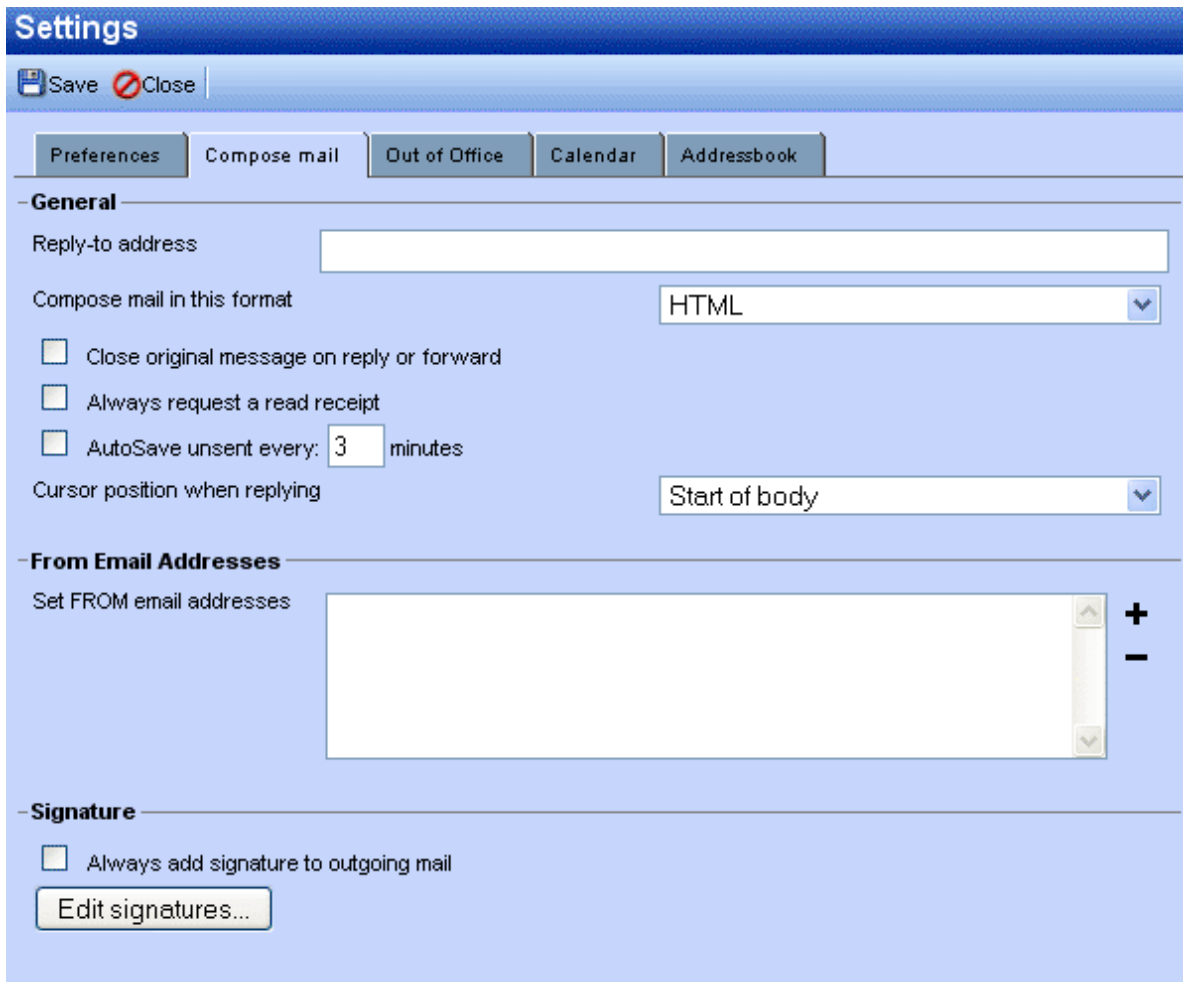


Figure 2.59. Settings: Compose mail

- *Reply-to address*, the address that recipient of a users emails will “reply to” when replying.
- *Compose mail in this format*, composing new mails as *Plain text* or *HTML* (rich formatting).
- *Close original message on reply or forward*, when double clicking a mail in the list view a dialog pops up showing the message. With this option enabled that dialog will close when either its *reply* or its *forward* is clicked.
- *Always request a read receipt*, turn this on to automatically request read receipts.
- *AutoSave unsent every: ... minutes*, set when to auto-save unsent messages.
- *Cursor position when replying*, where to start entering text when replying a mail.
- *Set FROM email addresses*, here the addresses that can be used to send mail *FROM* are specified. Use the ‘+’ button on the right to add an address; to remove an address select it and click the ‘-’ button. While composing an email the *FROM* address can be selected from a drop down menu on top of the *TO* field — this drop down menu contains the addresses picked with this setting.

Figure 2.60. Example: Set from address

- *Edit signatures...*, opens the signature dialog from where signatures --for new mails or replies and forwards-- are managed. See [Figure 2.61, “HTML signature”](#).

Figure 2.61. HTML signature

2.13.3. The “Out of Office” tab

Here a user can mark himself “in” or “out” of the office. The AutoReply message that is sent automatically in reply to all incoming messages can be specified on this tab as well.

To prevent flooding, AutoReplies are only sent once per day to a specific email address.

2.13.4. The “Calendar” tab

- *Start and End of workday*, specifies the part of the day that is marked as “workday”.
- *Vertical size*, the vertical size of the calendar. People with very large displays want to consider setting it to *Large*.

- *Calendar resolution*, the smallest time block that appointments align with.
- *Default Reminder*, whether or not reminders are added to appointments by default, and if so, how long before the appointment start the default reminder should occur. These setting can be overwritten per appointment.

The following options relate to the Multi User Calendar (MUC):

- *Number of days displayed*, the number of days that are visible at default zoom level in the MUC.
- *Number of days loaded*, the number of days that are loaded. When this number is larger then the *Number of days displayed*, the remaining days need scrolling to be visible.

2.13.5. The “Addressbook” tab

- *Default selected folder/addressbook*, sets which folder of addressbook should be used by default throughout the Zarafa WebAccess.

2.13.6. The “Shortcuts” tab

Here keyboard shortcuts can be switched “on” or “off”. All the available keyboard shortcuts are listed here as well.

2.14. Firefox Extensions

Since the Zarafa WebAccess is web application, it cannot deliver all functionality a native application can. Especially integration with the desktop is hard for web applications. To overcome this Zarafa has released two extensions for *Mozilla Firefox*¹, since most of our clients use this fully open source browser.

Currently Zarafa offers two Firefox extensions from its website:

2.14.1. Zarafa Attachment Drag ‘n’ Drop Extension

By installing this plug-in it is possible to use drag-and-drop for files in order to attach them to messages. It is possible to drag and drop a single file or a selection of multiple files.

From 6.40.4 up, this plug-in also allows messages to be dragged and dropped to the desktop. This function is used by selecting one or more messages and then dragging and dropping the envelope-icon to your desktop, as seen in *Figure 2.62, “Drag messages to desktop icon”*.



Note

From 6.40.5 up, the add-on is no longer included in the ZCP packages, and can only be installed from the Mozilla FireFox add-ons site located at <https://addons.mozilla.org/en-US/firefox/addon/zarafa-dragndrop/>

¹ <http://mozilla.org>

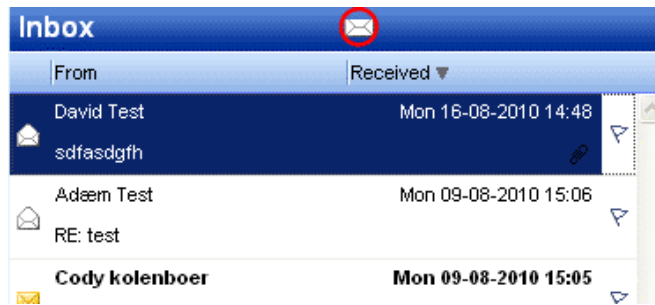


Figure 2.62. Drag messages to desktop icon

2.14.2. Zarafa New Mail Notification Extension

The Zarafa New Mail Notification Extension allows users to check their Zarafa Inbox without opening the Zarafa WebAccess or Outlook. A Zarafa icon is put in the bottom right corner of the Firefox browser and will inform the users about incoming mail. A double click on the icon will redirect users directly to their WebAccess.

2.14.2.1. Settings

With a right-click on the Zarafa icon the extension's settings are accessible, as shown in [Figure 2.63](#), "[Zarafa Mail-checker extension settings](#)".

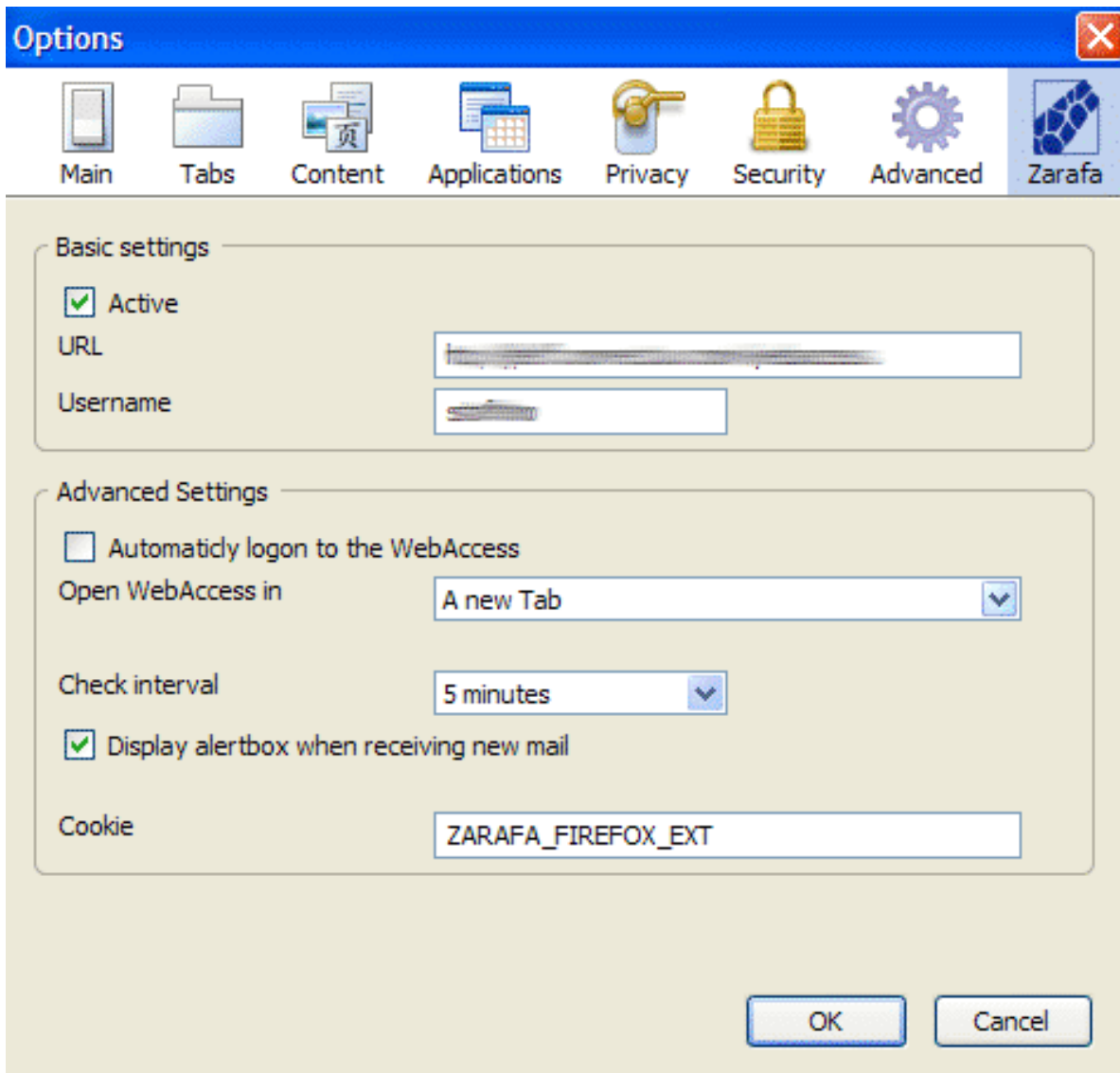


Figure 2.63. Zarafa Mail-checker extension settings

It is possible to activate or deactivate the plug-in.

It is necessary to fill in the url of the Zarafa WebAccess and the user's username.

The advanced settings allow the user to personalise the plug-in by changing the time interval for mail check and enabling/disabling the notification for new mail. It is also possible to specify how the Zarafa WebAccess should be opened when double clicking on the Zarafa icon, and to enable or disable automatic login to the WebAccess.

2.15. Advanced Zarafa WebAccess configurations

2.15.1. Zarafa WebAccess as default mail client

Since ZCP version 6.20 it is possible to set the Zarafa WebAccess as the default email client. Below we show three examples on associating the WebAccess with the default action for when a user clicks on an email addresses link.

2.15.2. Windows

For all users on a computer:

```
Windows Registry Editor Version 5.00

[HKEY_LOCAL_MACHINE\SOFTWARE\Clients\Mail\Zarafa Web Client]
@="Zarafa Web Client"

[HKEY_LOCAL_MACHINE\SOFTWARE\Clients\Mail\Zarafa Web Client\DefaultIcon]
@="%windir%\zarafa.ico"

[HKEY_LOCAL_MACHINE\SOFTWARE\Clients\Mail\Zarafa Web Client\Protocols]

[HKEY_LOCAL_MACHINE\SOFTWARE\Clients\Mail\Zarafa Web Client\Protocols\mailto]
"URL Protocol"=""

[HKEY_LOCAL_MACHINE\SOFTWARE\Clients\Mail\Zarafa Web Client\Protocols\mailto\DefaultIcon]
@="%windir%\zarafa.ico"

[HKEY_LOCAL_MACHINE\SOFTWARE\Clients\Mail\Zarafa Web Client\Protocols\mailto\shell]

[HKEY_LOCAL_MACHINE\SOFTWARE\Clients\Mail\Zarafa Web Client\Protocols\mailto\shell\open]

[HKEY_LOCAL_MACHINE\SOFTWARE\Clients\Mail\Zarafa Web Client\Protocols\mailto\shell\open\command]
@="rundll32.exe url.dll,FileProtocolHandler http://<ZARAFa_WEBACCESS_ADDRESS>/index.php?action=mailto&to=%1"

[HKEY_LOCAL_MACHINE\SOFTWARE\Clients\Mail\Zarafa Web Client\shell]

[HKEY_LOCAL_MACHINE\SOFTWARE\Clients\Mail\Zarafa Web Client\shell\open]
@="Zarafa Web Client"

[HKEY_LOCAL_MACHINE\SOFTWARE\Clients\Mail\Zarafa Web Client\shell\open\command]
@="rundll32.exe url.dll,FileProtocolHandler http://<ZARAFa_WEBACCESS_ADDRESS>/index.php?action=mailto&to=%1"

[HKEY_LOCAL_MACHINE\Software\Classes\mailto]
"EditFlags"=hex:02,00,00,00
"URL Protocol"=""
@="URL:MailTo Protocol"

[HKEY_LOCAL_MACHINE\Software\Classes\mailto\DefaultIcon]
@="%windir%\zarafa.ico"

[HKEY_LOCAL_MACHINE\Software\Classes\mailto\shell]

[HKEY_LOCAL_MACHINE\Software\Classes\mailto\shell\open]

[HKEY_LOCAL_MACHINE\Software\Classes\mailto\shell\open\command]
@="rundll32.exe url.dll,FileProtocolHandler http://<ZARAFa_WEBACCESS_ADDRESS>/index.php?action=mailto&to=%1"
```

For current user only:

```
Windows Registry Editor Version 5.00

[HKEY_CURRENT_USER\SOFTWARE\Clients\Mail\Zarafa Web Client]
@="Zarafa Web Client"

[HKEY_CURRENT_USER\SOFTWARE\Clients\Mail\Zarafa Web Client\DefaultIcon]
@="%windir%\zarafa.ico"

[HKEY_CURRENT_USER\SOFTWARE\Clients\Mail\Zarafa Web Client\Protocols]
```

```
[HKEY_CURRENT_USER\SOFTWARE\Clients\Mail\Zarafa Web Client\Protocols\mailto]
"URL Protocol"=""

[HKEY_CURRENT_USER\SOFTWARE\Clients\Mail\Zarafa Web Client\Protocols\mailto\DefaultIcon]
@="%windir%\zarafa.ico"

[HKEY_CURRENT_USER\SOFTWARE\Clients\Mail\Zarafa Web Client\Protocols\mailto\shell]

[HKEY_CURRENT_USER\SOFTWARE\Clients\Mail\Zarafa Web Client\Protocols\mailto\shell\open]

[HKEY_CURRENT_USER\SOFTWARE\Clients\Mail\Zarafa Web Client\Protocols\mailto\shell\open\command]
@"rundll32.exe url.dll,FileProtocolHandler http://<ZARAFa_WEBACCESS_ADDRESS>/index.php?action=mailto&to=%1"

[HKEY_CURRENT_USER\SOFTWARE\Clients\Mail\Zarafa Web Client\shell]

[HKEY_CURRENT_USER\SOFTWARE\Clients\Mail\Zarafa Web Client\shell\open]
@"Zarafa Web Client"

[HKEY_CURRENT_USER\SOFTWARE\Clients\Mail\Zarafa Web Client\shell\open\command]
@"rundll32.exe url.dll,FileProtocolHandler http://<ZARAFa_WEBACCESS_ADDRESS>/index.php?action=mailto&to=%1"

[HKEY_CURRENT_USER\Software\Classes\mailto]
"EditFlags"=hex:02,00,00,00
"URL Protocol"=""
@="URL:MailTo Protocol"

[HKEY_CURRENT_USER\Software\Classes\mailto\DefaultIcon]
@="%windir%\zarafa.ico"

[HKEY_CURRENT_USER\Software\Classes\mailto\shell]

[HKEY_CURRENT_USER\Software\Classes\mailto\shell\open]

[HKEY_CURRENT_USER\Software\Classes\mailto\shell\open\command]
@"rundll32.exe url.dll,FileProtocolHandler http://<ZARAFa_WEBACCESS_ADDRESS>/index.php?action=mailto&to=%1"
```

2.15.2.1. Installing the “.reg” file

1. Open a text editor like Notepad.
2. Insert the desired registry key, where **<ZARAFa_WEBACCESS_ADDRESS>** should be replaced by the **url** of your Zarafa WebAccess.
3. In the *Start Menu*, hit *Run*, enter **regedit**, and hit *Ok*.
4. Import the just created registry key.
5. In Outlook 2003/2007 go to *Tools > Options > Other > uncheck Make Outlook the default program for Email, Contacts & Calendar*.
6. In the *Start Menu*, hit *Run*, enter **%windir%**, and hit *Ok*. The default Windows folder will be opened.
7. Copy and paste **zarafa.ico** into the folder. The icon can be found on the server in the following folder: */webaccess/client/layout/img/favicon.ico*.

2.15.3. Linux

1. Make a new script file **mailto.sh**.

- Put the following lines in the file:

```
#!/bin/bash

ADDRESS=`echo $1|cut -f 2 -d : -`

# Logs this to syslog... just helps to make sure it is working properly
logger "Opening Zarafa mail client, addressed to $ADDRESS"

firefox "http://<SERVER>/<USER>/webaccess/index.php?action=mailto&to=$ADDRESS"
```

- Replace **http://<SERVER>/<USER>/webaccess/** with base URL of the WebAccess.
- Save the file (preferably in the home directory), then run **chmod uog+rx mailto.sh** from the same directory.
- Now type **gnome-default-applications-properties** on a console or go to *System > Preferences > More Preferences > Preferred Applications*.
- Open "Mail reader" and set it to a custom action that looks like: **/home/<USERNAME>/mailto.sh %s**

2.15.4. Adding Zarafa WebAccess as *mailto* handler in Firefox

When clicking an URL of an email address (a *mailto* address) in Firefox it will try to open a mail client. Firefox has a list of possible mail clients to use, with the possibility to pick a default. To use the Zarafa WebAccess to handle *mailto* URLs in Firefox follow the these steps:

- Type **about:config** in the address bar and press Enter. Ignore the warranty warning.
- Put **gecko.handlerservice** in the filter box.
- Double-click **gecko.handlerService.allowRegisterFromDifferentHost**. This will change its value from *false* to *true*.
- Paste this code in the address bar while replacing **https://<ZARAFI_WEBACCESS_ADDRESS>** with the URL used to access the installation of the Zarafa WebAccess (usually the url used to get to the login screen of the WebAccess), then press Enter:

```
javascript:window.navigator.registerProtocolHandler("mailto","https://<ZARAFI_WEBACCESS_ADDRESS>?action=mailto&url=%s","Zarafa WebAccess")
```

- Below the address bar a message asking if the Zarafa WebAccess should be added as an application to handle *mailto* links. Click the *Add Application* button.
- Next time *mailto:* link is clicked, a screen will appear allowing the preferred mail client to be picked. Select the Zarafa WebAccess, and possibly check the box next to *Remember my choice for mailto: links*, then click OK.

From now on the Zarafa WebAccess will directly be used when clicking "mailto" links in Firefox. Please note that a user needs to be logged in (or make use of Single Sign On) for it to work smoothly.

2.16. Quirks

2.16.1. Firefox specific

Since Firefox 4.0, some alert messages may popup from the main window instead of in the message dialog. Although the alert message can be handled in the other window, it may be confusing why the browser isn't responding. To revert the alert message behaviour to separate windows, the Firefox configuration needs to be altered. To do this, open a new tab or window in Firefox and type **about:config** in the url bar. Filter on **prompts** to find the correct option. Change the value of **prompts.tab_model_enabled** from **true** to **false**. Alert popups will now be separate windows again.

Separate WebApp manual



Note

Zarafa WebApp has moved to its own [WebApp User Manual](#)¹ and is no longer part of the general User Manual.

¹ http://doc.zarafa.com/trunk/User_Manual_WebApp/en-US/html-single/

Configure Outlook (using the Zarafa Windows Client)

4.1. Installation of the Outlook client

There are two requirements that must be fulfilled prior to installing a Zarafa workspace. First, Outlook 2003 or higher is needed, and second, the user must be created on the Zarafa Server.

The following steps are necessary to install a Zarafa workspace:



Note

It is recommended to have the latest Service Packs and Security patches installed.

4.1.1. Install the client

To install the Zarafa Windows Client first assure Outlook is set as default email application from: *Control panel > Internet > Applications*. Then put the Zarafa CD in the drive, wait for the automatic start of the CD and choose the uppermost option: *Windows Client*. Alternatively, if the client was downloaded from another source, double click the file named: **zarafaclient.msi**



Note

With version 5.10, Zarafa is introducing an MSI installer for the Zarafa client instead of an .exe installer. When upgrading from a Zarafa version prior to 5.10, it is advised to remove the older Zarafa client before running the new MSI installer. If the old client is not removed two Zarafa clients will be visible in the Windows software list.



Note

Version 5.xx of the Zarafa client is not compatible with a version 6.xx Zarafa server. With version 6.00, Zarafa will ask during the installation if it needs to update the existing files. Select this option if it's not necessary to connect to a Zarafa 5.2x server anymore.

4.1.1.1. Instructions for Outlook 2003.

Create a new mail profile in Outlook 2003:

1. Go to *Control Panel > Mail > Show Profiles....*
2. Click *Add...* and fill in a title, for example *Zarafa*. Click *OK*.

Add a Zarafa Server to this profile:

1. Choose *Create a new mail account* and click *Next* in the dialog window that appears after adding the profile (or after choosing *Email Accounts...* in Outlook or the Mail setup).
2. Choose the last option (*Extra server types*) and click *Next > choose Zarafa 6 Server > click Next*⁵¹

3. The window shown on the right will appear.
4. Fill in the address or host name of the server in the Server field.
5. *Optionally*: choose *HTTPS* connections where available.
6. Fill in the login data of the user in the *Username* and *Password* fields.
7. Choose the connection type, there are 3 different possibilities:
 - Online
 - Cached Zarafa mode
 - Detect at Startup



Note

More information on the three connection types can be found in [Section 4.2, "Outlook connection type"](#).

8. Choose *OK* a couple of times to close the windows.

4.1.1.2. Instructions for Outlook 2007 and higher

1. Go to *Control Panel > Mail > Show Profiles...*
2. Click on *Add...* and fill in a title, for example *Zarafa*. Click *OK*.
3. Select the option *Manually configure server settings or additional server types* and click on *Next*.
4. Select *Other*, and choose *Zarafa Server* and click *Next*.
5. Fill in the address or host name of the server in the Server field.
6. *Optionally*: choose *HTTPS* connections where available.
7. Fill in the logon data of the user in the *Username* and *Password* fields.
8. Click *Ok*. The personal folders of this user and the public folders will appear as store in Outlook after adding the server in this way.
9. Click *Finish* to finalise the profile.



Important

The Zarafa account has to be the default account in the Outlook profile. It's not possible to have the Zarafa account as secondary account and use as primary account for example an IMAP account.

4.1.2. Start Outlook

1. Start Outlook and make sure the added profile is being used.

2. This can be set in *Control panel > Mail > Profiles...* on the bottom of the dialog window.
3. The private mailbox of the entered user and the public folder will appear as a store in Outlook.

4.2. Outlook connection type

By default, Outlook has an ongoing connection to the Zarafa server and does not store the folders and items on the local hard drive. With the introduction of Zarafa 6.00, it is possible to synchronise all private Outlook data to the local hard drive. Email, agenda and contacts can easily be accessed even if no connection to the server is available. This functionality is only available if the offline storage is enabled (see the connection types below).

The following three options are available for the connection to the server: *Online*, *Detect at startup* and *Cached Zarafa mode*. These will be described in the sections below.

4.2.1. Online

The Online type works the same as in the previous versions of Zarafa. When a network connection to the server is available, Outlook can be started. Whenever the connection to the server is not available email, agenda and contacts can not be accessed.

4.2.2. Detect at startup

With the Autodetect Offline / Online type Outlook checks at startup if the server can be reached. When Outlook has a connection to the Zarafa server all items will be synchronised to the offline storage. When the connection is lost, Outlook will not automatically switch to its offline storage. In order to switch to offline storage, Outlook needs to be restarted.

When Outlook is started and there is not a network connection available, Outlook will show a pop-up message which asks if it is wanted to work offline.



Note

Whenever the “_Detect at startup_” mode decides to work offline, the behaviour for that session will be as described below in [Section 4.2.3, “Cached Zarafa Mode”](#), effectively. In case it decides to work online, the behaviour of that session will be as described above in [Section 4.2.1, “Online”](#).

4.2.3. Cached Zarafa Mode

The third type of connection is Cached Zarafa Mode. This type is similar to the caching mode of MS Exchange. If this type is selected, the offline storage will always be used. When there is a network connection available all items of the user`s own store will be synchronised to the offline storage. The first time the Outlook profile is being configured it is required to have a connection to the Zarafa server. After the profile is created and Outlook can be started, all folders and items will be synchronised.



Important

Please consider the limitations of the use of offline storage as described in [Section 5.1.2, “Limitations of working offline”](#).

4.2.4. What is the best connection type to choose?

Table 4.1. Connection type options

Type of user	Zarafa profile type
User that always works on the same fixed PC in the office	Online
User that uses roaming profiles and logs in on different fixed PC's in the office	Online
User that works with a fixed PC remote from a sub department over a small bandwidth internet connection	Cached Zarafa Mode
User with a laptop that is inside the office most of the time	Detect at startup
User with a laptop that is always out of the office	Cached Zarafa Mode
User that works on a Terminal Server	Online

4.3. Advanced configuration

Since version 6.20 two new settings are introduced in order to improve connection to the Zarafa server.

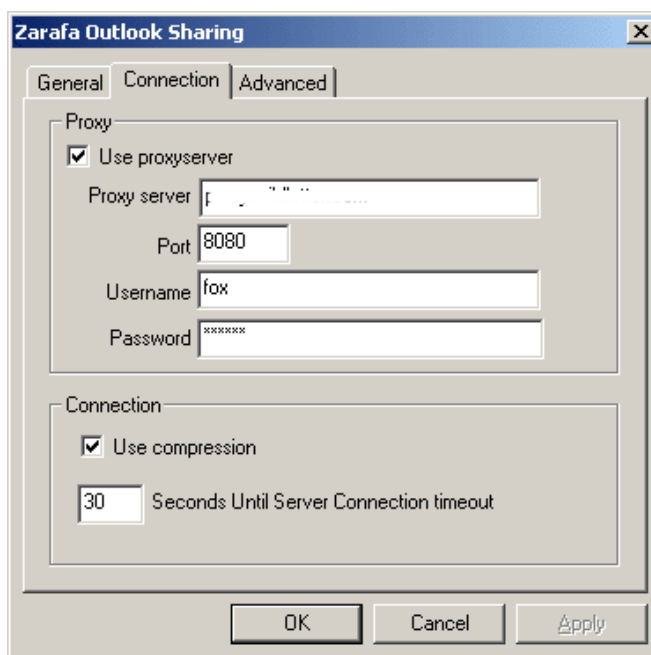


Figure 4.1. Connection settings

4.3.1. Proxy settings

If the zarafa server is only reachable via a proxy server it is possible to enter the information of the proxy server into the client settings.

4.3.2. Other connection settings

Two other connection settings are configurable:

Compression: Uncheck this option if compression is not wanted. This option is on by default.

Server connection timeout: Depending on the connection quality it is possible to change the timeout to the zarafa server. Default is 30 seconds.

4.4. Public Folder Favourites

To have a useful shortcut to the most used public folders use the Favourite folder that can be found under the public folders tree. In order to add a folder to the Favourite folder, right click on a public folder and select *Add to Zarefa favourite folder*. In Outlook 2007 the *Add to Favourites* window will appear. In Outlook 2003 the shortcut will be added directly in the favourites folder.

By default only the selected folder will be inserted in the favourite folder — without its subfolders. It is necessary to specify otherwise.

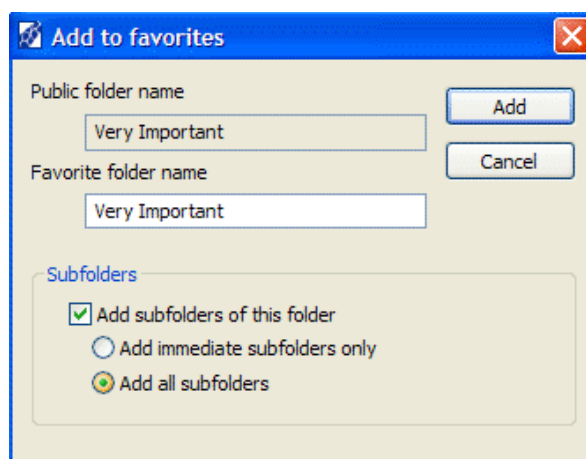


Figure 4.2. Add to favorites window (Office 2007)

Using Outlook

The Zarafa Windows Client does not change the way one works with Outlook significantly. However there are some extra features available to those using Outlook to connect with a Zarafa Server.

5.1. Working offline

After starting Outlook in *Cached Zarafa mode* or *Detect at startup mode* additional synchronisation features will be available in Outlook. For instance: the *Synchronise* button on the toolbar, which shows a progressbar during the synchronisation.



Figure 5.1. Synchronisation plugin buttons

The synchronisation time can be scheduled by using the configure button.

When synchronisation is started for the first time, the Global Address Book will be synchronised first.

After the Global Address Book has been synchronised, the Inbox will be synchronised. The most recent emails will be synchronised first.

During the initial synchronisation new email will not be received. New email will be retrieved after the first synchronisation is finished or after Outlook is restarted during the sync. Sending new email during synchronisation, however, will be done immediately.

5.1.1. Sending email during offline use

When email is sent during offline use, the email will be kept in the Outbox. To send the email when the connection to the server has been reinstated, the *Send & Receive* button has to be selected.

This action can be scheduled by configuring the *Send & Receive* settings:

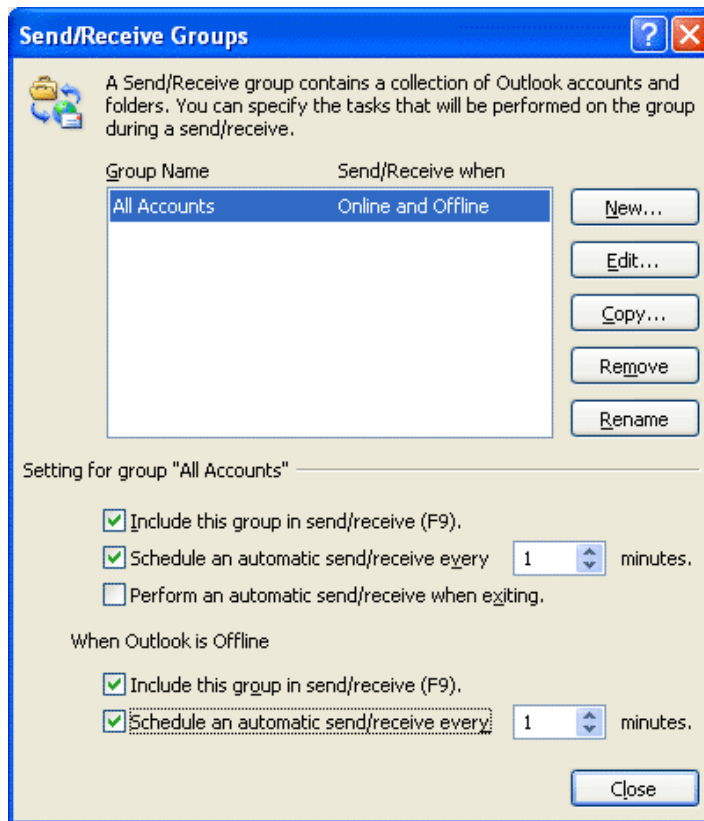


Figure 5.2. Send and receive settings

5.1.2. Limitations of working offline

Things to consider when using "Offline" functionality:

- Currently it is not possible to synchronise the favourite folders of the Public Folder or delegate mailboxes.
- Public Folders and delegate mailboxes will be directly opened from the server, like the Online Zarafa modus, and are thus not available while working offline.
- The synchronisation of a mailbox of 1000MB will take around 1 hour with a 100Mb/s network connection to the Zarafa server.
- In Offline mode it is not possible to open shared mailboxes or set security permissions on folders.
- In a Cached Mode profile the button *Open other user's folder* is disabled.
- Currently, shared mailboxes and calendars can only be opened via the button *Open shared folders* or via the button *Open a shared calendar* in the calendar section of Outlook.
- If it's not possible to open the Public Folder after being offline, the session is not available on the server. To open the Public Folder again, it is necessary to restart Outlook to set up a new session.

5.2. Folder Management

5.2.1. The creation of a public folder

By default, every user is able to create folders and items in the Public folders. However, the permissions on these new items are set so that a new folder can only be read by other users.

To enable others to write to the folder, the correct permissions must be set; for example allow writing and deleting by the group Everyone. (See Sharing of folders).

5.2.2. Sharing of folders (setting permissions)

The permission structure has been built with flexibility in mind. It is possible to set permissions per folder. Every folder inherits the permissions of the folder it is located in. Every item inherits the permissions of the folder it is contained in.

Before a folder can be added and viewed by other users, the permissions have to be set correctly.

To accomplish this, right click on a folder and choose *Properties*.

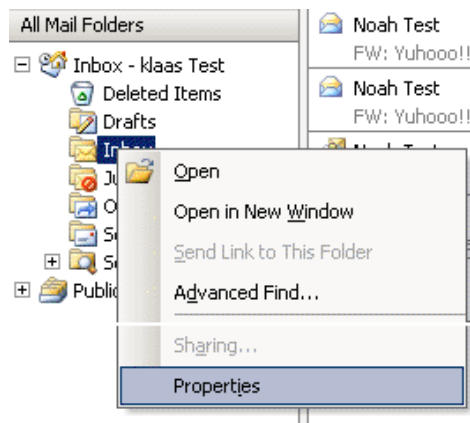


Figure 5.3. Folder properties button

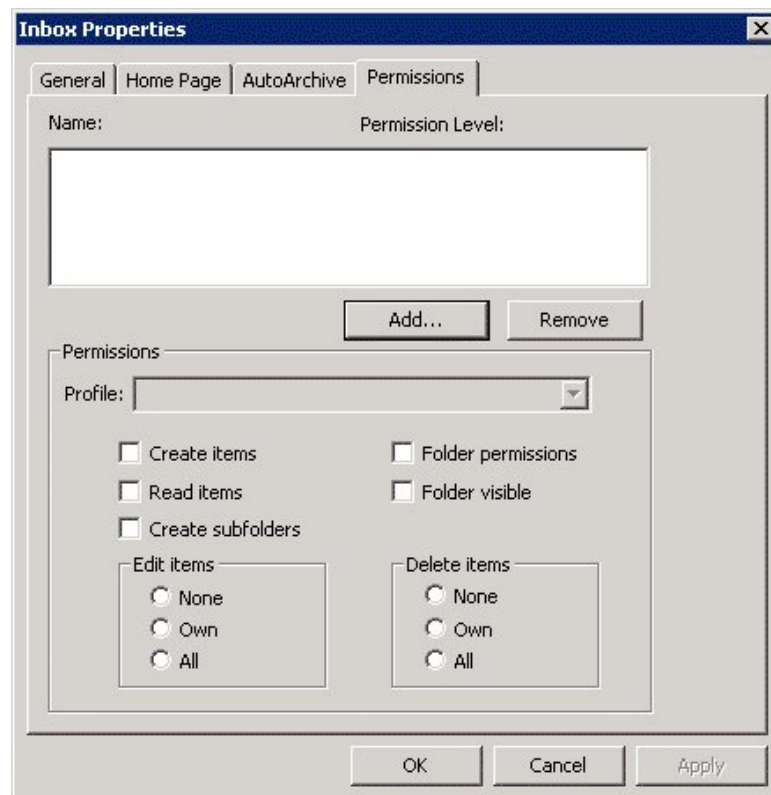


Figure 5.4. Set folder permissions

In the appearing dialog window different settings can be chosen, regarding the properties of the folder. The last tab window contains the permissions settings.

At the top is a list with users and the permissions which have been set. After selecting a user the rights can be selected at the bottom. Choosing a profile from the drop down list makes this easier by automatically selecting often used settings.

Users can be added and deleted with the two buttons below the user list.

For example, to give user *Pete* the rights to read and write to items in a folder, first click *Add...* After selecting *Pete* and clicking *OK*, *Pete* will show up in the list. After this the right checkboxes can be set; to enable reading and writing only set *Read items* and *Edit items* on *All*.

Table 5.1. Explanation of permissions

Permissions	Description
Create items	The user can create items
Read items	The user can read items
Edit all items	The user can edit all items
Edit own items	The user can only edit their own items
Delete all items	The user can delete all items
Delete own items	The user can only delete their own items
Create subfolders	The user can create subfolders
Folder visible	The user can view the folder
Folder permissions	The user can change permissions on the folder

If there are no check boxes selected for a user, then denying permissions are in effect and the user can not access the folder. When **no** permissions are set on the folder, the folder one level higher is checked for the set ACLs.



Note

Permissions that apply to the user are cumulative, meaning that the user will receive the sum of the permissions that apply to his or her user account and groups of which the user is a member.

By default a user only has read/write permissions on their own folders and is able to create folders in the Public Folders.

The owner is saved with every item. This way, depending on the set permissions, a user is only allowed to delete their own items and not items belonging to other users. The owner of the mail box can always edit or delete all items in his/her mail box, regardless of the owner of the items.

It is possible to give administrative rights to users, after which they have access to the entire Zarafa system. These administrators have the ability to change the permissions on public folders and the folders of each user on the system. Also, every folder or item can be opened by an administrator.

5.2.3. Adding or opening folders shared by other users

To add shared folders of other users and to be able to write to or read from it, the following steps should be executed:

1. Click in Outlook on *File* and *Open Shared Folders...*

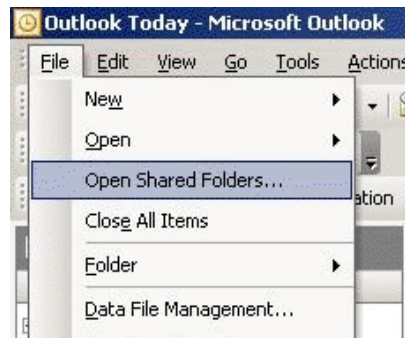


Figure 5.5. File menu

2. Choose in the dialog window the user and the type of folder to be opened, then click OK.



Figure 5.6. User and folder selection

If Inbox is chosen (permanent), then not only a folder will be opened but an extra mail box will be added in the folder list of Outlook. This folder will appear in a separate Outlook window with the folders described as (temporary).

It is only possible to read or write to this folder after the owner has given the rights to do so. See the previous paragraph about setting permissions.

5.2.4. Adding or removing complete stores of other Zarafa users

In order to delete mail boxes (also called stores) which were added to the list of mail boxes in the folder list of Outlook, the user must do the following:

1. Click with the right mouse button on a mail box:

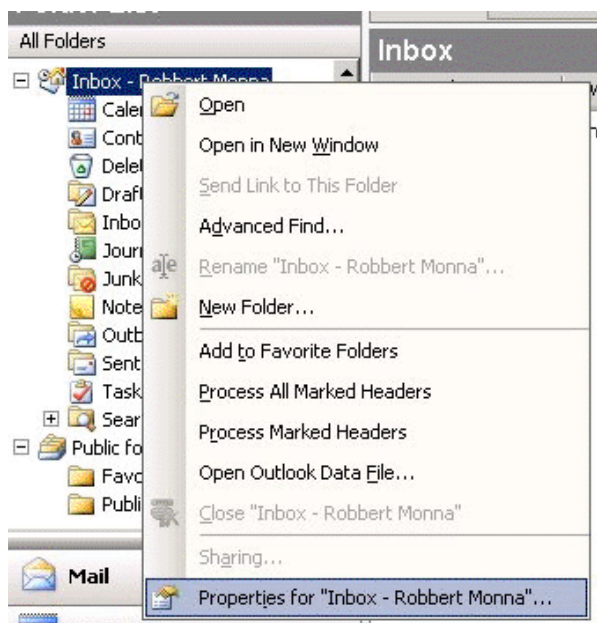


Figure 5.7. Folder Properties selection

2. Select *Properties* > click *Advanced...* > select the tab *Advanced* in the Zarafa server dialog window.



Figure 5.8. Zarafa server dialog

3. Click *Remove* to remove or *Add* to add a mail box.

After clicking *Add*, select a user to add his/her store and let the store appear in the folder list of Outlook.

5.3. Searching in Outlook

A search executed in Outlook will query the database of *zarafa-search* (*zarafa-indexer* in Zarafa 6.40.x - 7.0.x). To enhance the search results Outlook will divide certain words in individual tokens, depending on the language set in the *language bar* of Windows.

For example: searching for the word *Sauermann* or *Dauermann* in a German system. These words will be split into *mann* and *Sauer/Dauer*. In a Dutch system the name *Timmermans* will be split to *mans* and *Timmer*.

To only search for the whole word the search-term has to be endorsed in angle brackets (< and >).



Note

The same accounts for hyphenated words like *part-time*. Searching for this will give all results matching either part or time. Only searching for <part-time> will give only results matching both words.

5.4. Restoring deleted items

Because Zarafa uses a so-called Soft Delete system, items removed from view in Outlook can still be restored. This can be done by selecting *Tools > Recover Deleted Items*.

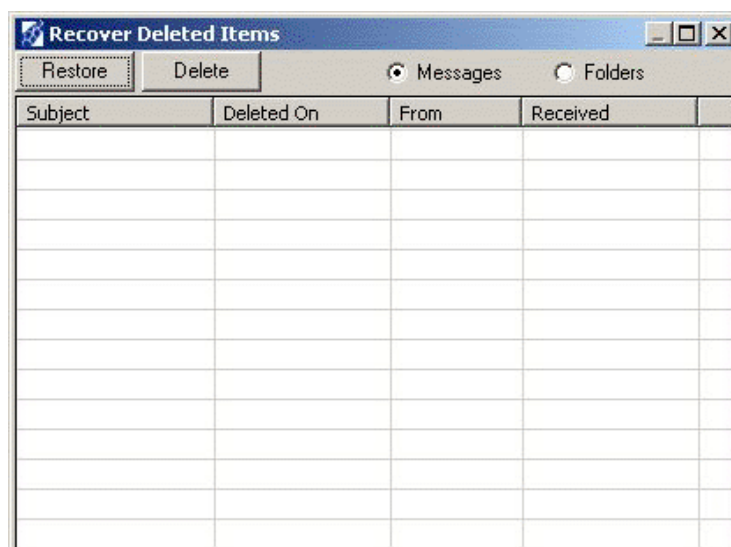


Figure 5.9. Recovering deleted items

Select the items which need to be recovered and click on the *Restore* button to restore the items to the folder they were deleted from. Most items will be restored to the Deleted Items folder.

If *Delete* is selected, the items will be truly removed from the server, and these items can no longer be recovered. The server has a lifetime on these items, so after a set period of time, the items will be removed.

5.5. Free/Busy updates

When new appointments are created in the calendar, the Zarafa client will update the Free/Busy information. This update will occur some time after the appointment was saved or when Outlook is closed. Other users will not directly see this change in their Free/Busy overview.

When an appointment is created, it is possible to invite other people. If other users are added, the overview will be updated to show the Free/Busy times of the user, making it easy for the organizer to plan the new appointment.

To use the Free/Busy times, the Public Store on the Zafra server must be available. All the Free/Busy times will be stored in an invisible folder in the Public Store. If a user did not yet login with Outlook or Webaccess and did not create an item in the calendar, the Free/Busy times will not be available.

5.6. Resources

With the resource feature the availability or scheduling of meeting rooms, beamers, cars or other objects with limited availability in the company is made easy. Resources are allocated through meeting requests.

The following steps show how to allocate a resource:

1. Create a new appointment in Outlook.
2. Open the *Scheduling* tab.

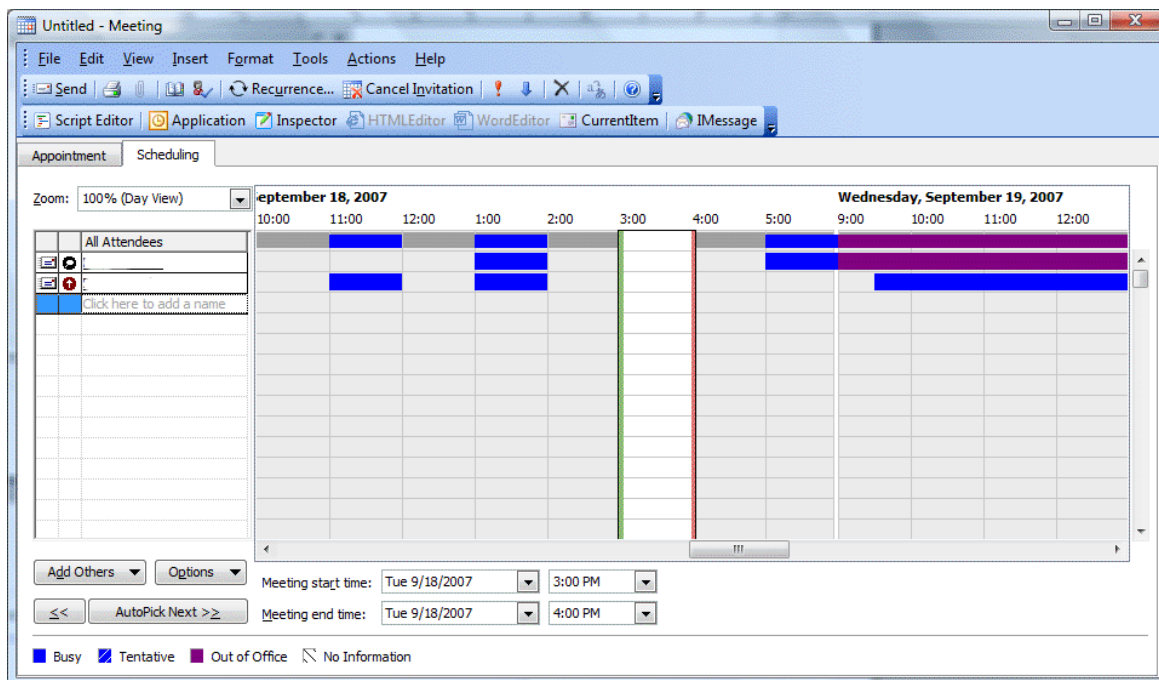


Figure 5.10. Free/Busy information

3. Add the name of the resource or select the resource from the Global Address book.
4. Change the icon *Required attendee* to *Resource or Equipment*.

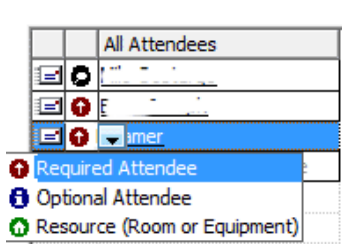


Figure 5.11. Select the option **Resource**

5. Add the other attendees, that will attend the meeting.

6. Select a free timeslot via the freebusy times and send the meeting to the attendees.
7. If the resource is available in this timeslot, a pop-up will show that the resource is successfully booked.

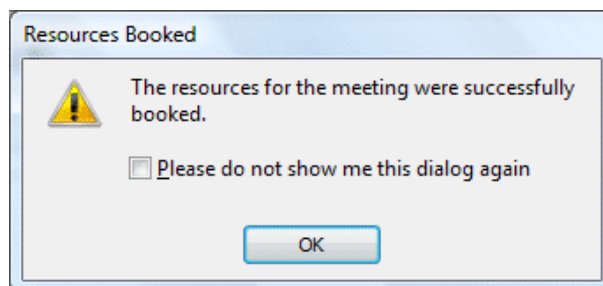


Figure 5.12. Pop-up after the resource is successfully booked

8. If the resource is unavailable, a different (free) timeslot needs to be selected.

Note

When an all day event is planned, please make sure the appointment is booked as *Busy* or *Out of Office*. By default, all day events are set as free and because of that not visible in the freebusy information.

5.7. Out of Office Assistant

1. Make sure the currently opened folder belongs to the store for which an auto-respond message needs to be set.
2. Click in the menu of Outlook on *Tools*, click *Out of Office Assistant*.
3. In this dialog window an auto-respond message can be set and the auto-responder can be activated or deactivated.

The first time Outlook is restarted, it will produce a pop-up asking if the auto-respond message should be disabled again.

This message is the same as the one that can be set with the Webaccess.

5.8. Rules

Select the Inbox folder for which a rule needs to be created, and click in the menu of Outlook on *Tools* and select *Rules and Alerts*. Here it is possible to create rules which are processed on the server when a new email arrives.

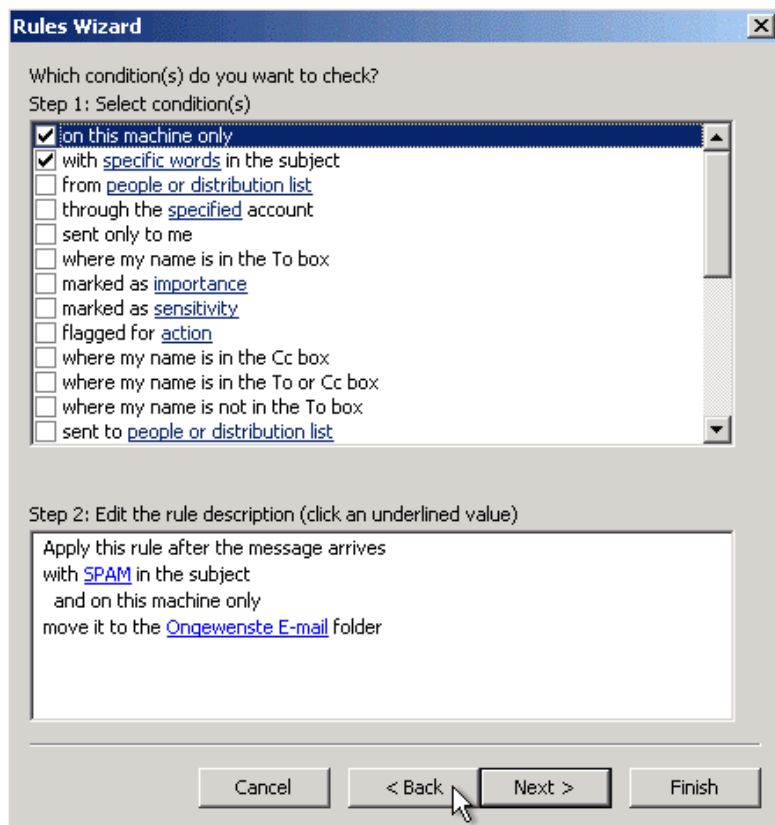


Figure 5.13. Rules wizard

There are certain limits to the types of rules that can be made. The condition of the rule can be in any form.



Note

When using Outlook 2003 or 2007, any rule created will automatically have an option called *on this machine only*. This option needs to be removed so the server can execute this rule.

It is only possible to copy/move or to delete a message. These rules can be created, but they will not be executed on the server. An example of such a rule is to send the mail to the printer, or forward it directly to another email account.

Local rules can still be performed manually by clicking on the Run rules now button in the Rules and Alerts dialog.

5.9. Signatures

Signatures can be set in the *Options* menu of Outlook. It is important to note that signatures set in Outlook are separate from those set in the WebAccess. It is necessary to set the signature in both clients separately.

5.10. Signing and encrypting messages

Since Zarafa 6.10 it is possible to use S/Mime certificates. Certificates enables the use of digitally signing emails and/or encrypting emails.

The description in this manual is the manual procedure. An automatic way to receive a certificate is to use Active Directory Services (ADS). The automatic method is not described in the client manual, but will be described in the server manual.

5.10.1. Retrieving a certificate

In order to get a certificate a registration at a Certificate Authority (CA) is needed. Multiple possibilities are available; one is to have the Active Directory (AD) act as a CA, the other is to subscribe to an independent CA, like CaCert (<http://www.cacert.org>).

5.10.1.1. Certificates via AD

The company's AD is configured to act as a CA:

1. Open Internet Explorer
2. Go to the following URL: **http://<domainserver>/servcrt**. If the URL is different, ask the systems administrator for the correct URL.
3. Click on *Request a certificate* and on the next page on *User Certificate* to generate a certificate.
4. The certificate will be placed into Outlook automatically.

5.10.1.2. Certificates via an independent CA

1. Go to the site of the CA.
2. Register the email address and create a certificate.
3. Use Firefox to retrieve the certificate.
4. In Firefox, go to *Tools > Options > Tab Advanced > tab Encryption > button View Certificates*.

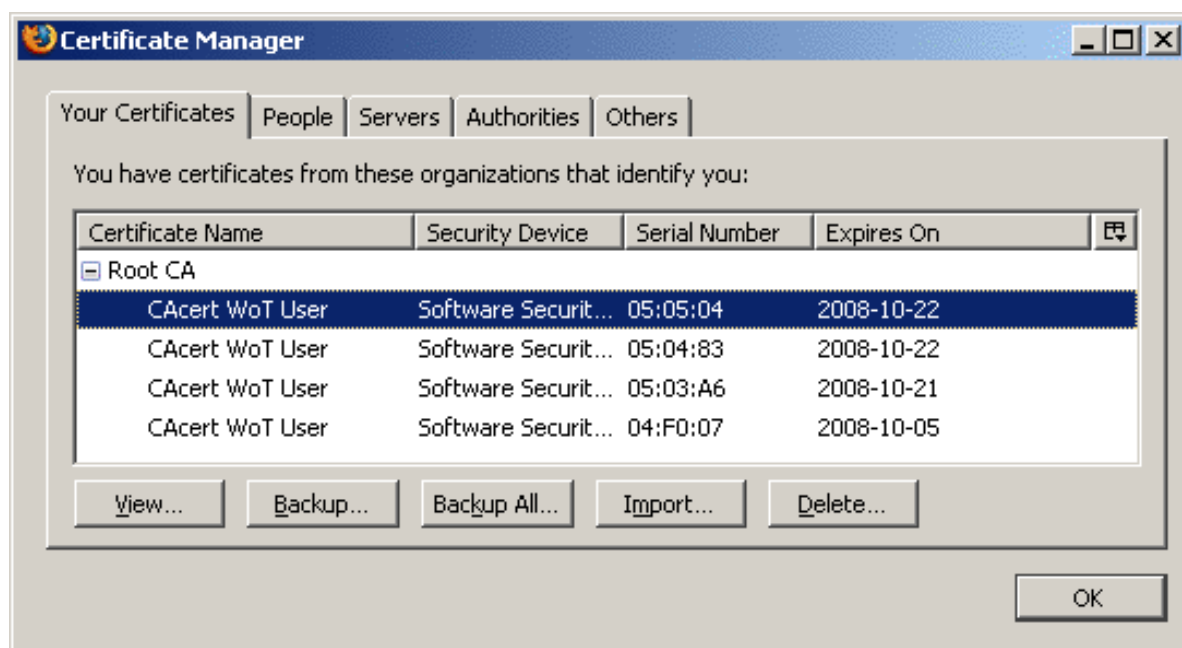


Figure 5.14. Certificate Manager

5. Select the correct Certificate and Click *Backup*.
6. Enter a password.

7. Save the certificate as a *PKCS12 file*.
8. Open Outlook.
9. Go to *Tools* (if Outlook 2003: *Options*) > *Security Tab* > Click *Import/Export...* > Click *Browse...*
10. Select the correct *.P12* file.
11. Enter the previous password.
12. Enter in the field *Digital ID Name*: the email address for which the certificate is meant.
13. Click button *OK* twice.

5.10.2. Check encrypted email settings

1. Go to *Tools* > *Options* > *Security* tab > click *Settings....*
2. Check if the field *Security settings Name*: contains the S/MIME settings for the email address.

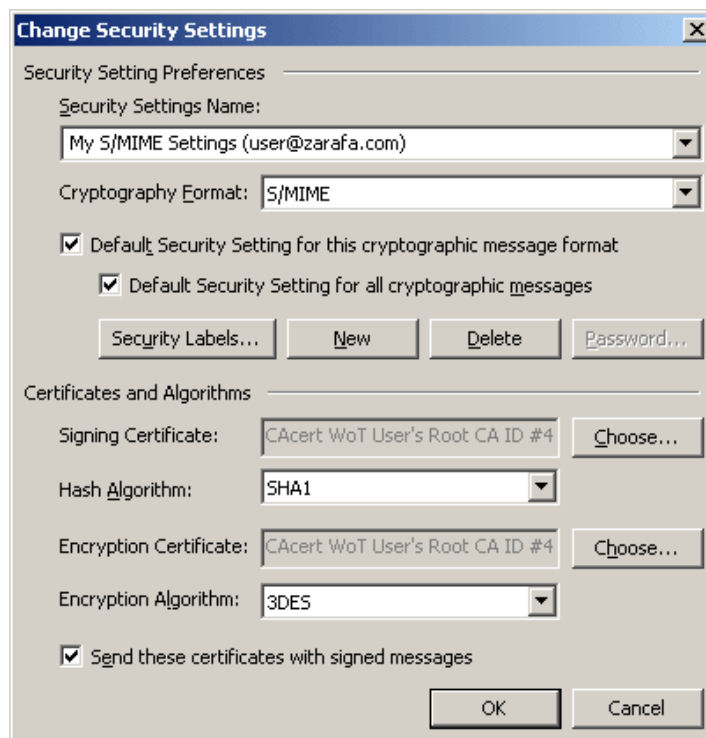




Figure 5.15. Security Settings

5.10.3. Using the certificate

After entering the certificate into Outlook it can be used to digitally sign outgoing emails or receive encrypted incoming emails.

When a new email or reply is opened two new icons will be present:  (the option to digitally sign messages) and  (the option to encrypt the message contents and attachments).

5.11. Fax Feature

Since version 6.20 it is possible to send fax through Outlook 2003/2007 and a third-party software such as Hylafax.

In order to send a fax:

1. Open the new e-mail window by clicking the *File* menu, selecting *New* and *Mail Message*.
2. Go to *Options, Format* and choose *Plain Text*.
3. Fill in the *To:* field with the following syntax [**fax: <fax number>**], where <fax number> is replaced with the actual phone number of the fax machine.
4. Fill in the *From:* and Subject fields as they will appear in the fax cover.
5. Enter the mail body as for a normal mail message
6. Click Send

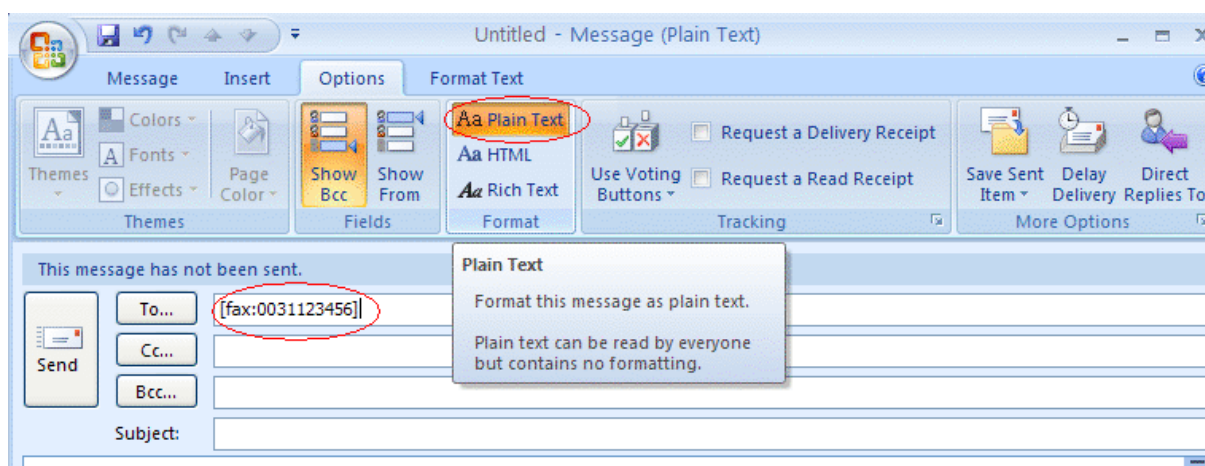


Figure 5.16. New fax item

Note

To be able to send fax messages, an administrator needs to install software or adjust settings on the server. Additional information for administrators can be found on the wiki article [Fax server integration](#)¹.

5.12. Delegation

Since Zarafa 6.20 two kinds of delegation are available: *Send on behalf* and *Send as*. In earlier versions, only *Send on behalf* is available.

5.12.1. Send on behalf of permissions

Send on Behalf permissions: if a user grants the appropriate permission to another user, the latter can send items on behalf of the other user. In this case an email or meeting request will be sent showing it was on behalf of the other user. The recipient will see in the *From:* field something similar to '*<delegate> on behalf of <user>*'. For example Pete enters the inbox of *info* and sends an email on behalf of the non-active user *info*, the following would be seen:

```
pete@example.com on behalf of info@example.com.
```

¹ http://zarafa.com/wiki/index.php/Fax_server_integration

The option to add delegates is available in the *Options* menu of Outlook, as seen in *Figure 5.17*, “Zarafa delegates”.

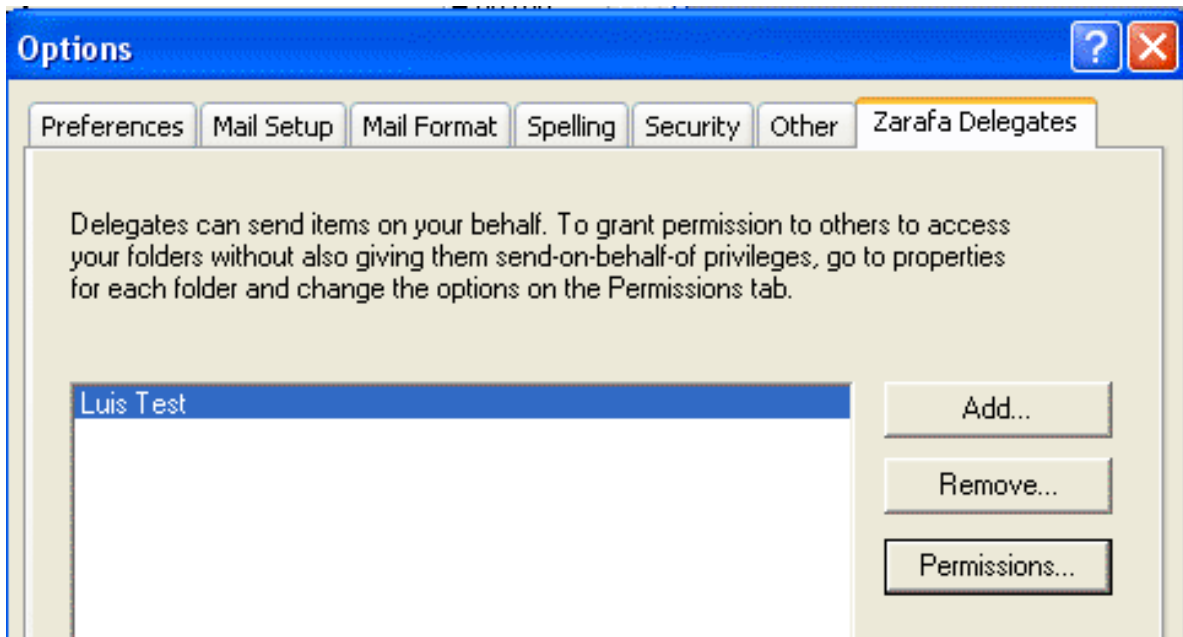


Figure 5.17. Zarafa delegates

5.12.2. Send as

Send As permissions: the system administrator can grant permission to user B to send as user A. The recipient(s) will not see that user B actually sent it; only user A appears in the *From:* field. See the Administrator manual on how to grant *Send As* permissions to users.

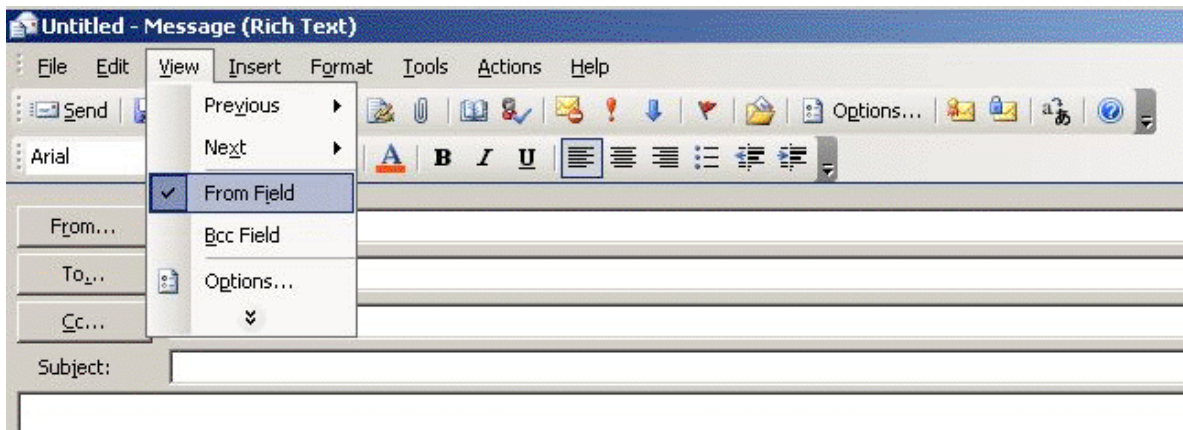


Figure 5.18. Show From: field in new email



Note

Due to security reasons the *send as* permission is only configurable by the administrator on the Zarafa server. However, this setting can always be overruled by the user itself and the old *on behalf of* permission can still be set by the user.



Note

If the (bounce) message below is returned when sending an email on behalf of, please contact the systems administrator.

You are not allowed to send as the given user.



Important

Due to the introduction of the Send As permissions in Zarafa 6.20 the previous abilities to send *on behalf of* are reset when upgrading to version 6.20 or higher; an administrator or the user who wants to delegate has to give the rights or permissions again.

Keep in mind that Send on Behalf permissions always overrules Send As permissions so a user can always choose not to let another user (mis)use send as permissions.

5.13. Categorisation

Since version 6.20 it is possible to categorise the items in Outlook by default categories and by customized categories.

5.13.1. Create a custom category in Outlook 2007

1. To create a custom category, click on the *Categorise* button in the Outlook toolbar and choose *All Categories*.
2. The Color Categories window will appear; choose *New* to add a new category.
3. The *New Category* window will appear; fill in the name of the category, choose a color to represent it and optionally a shortcut key.
4. Click on *OK* and the new category will be automatically added to the available categories in the Color category window.

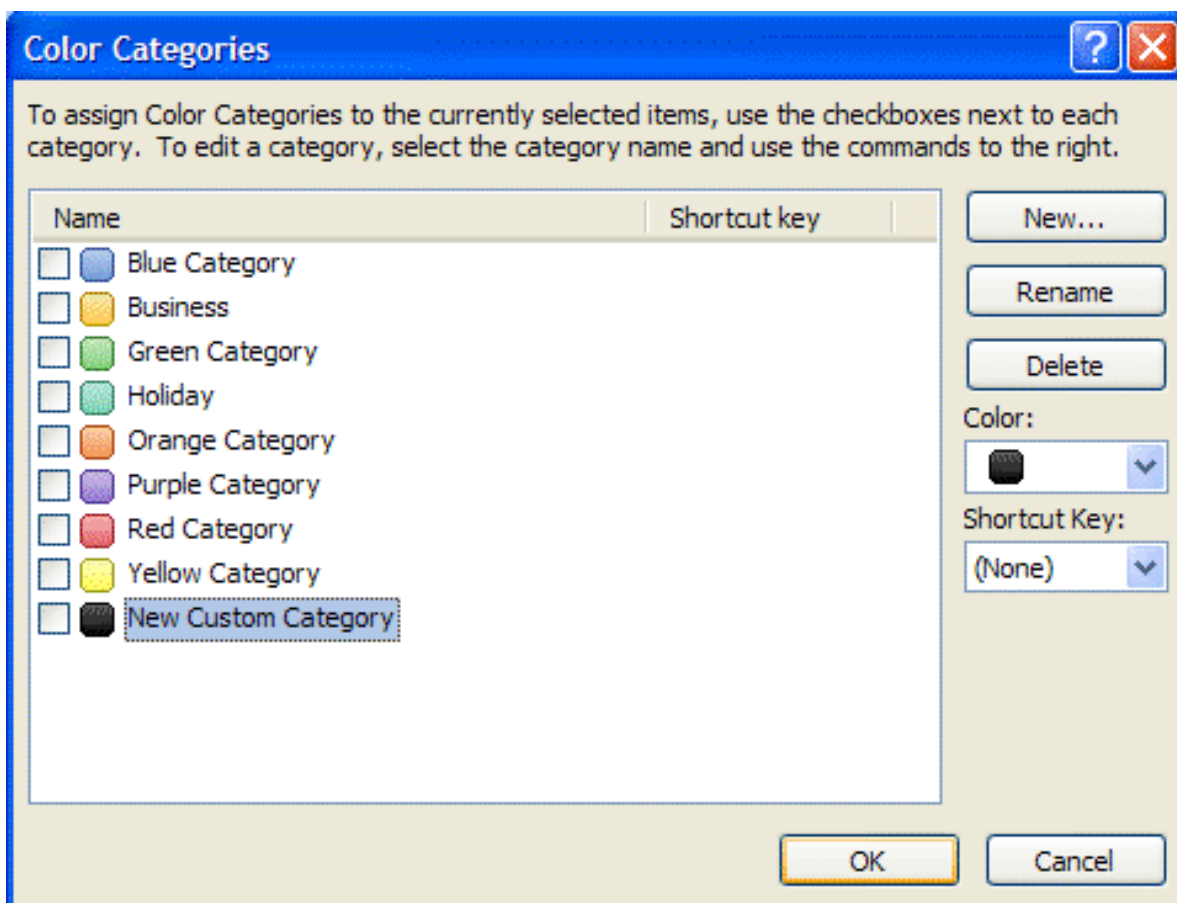


Figure 5.19. Categories in Outlook 2007

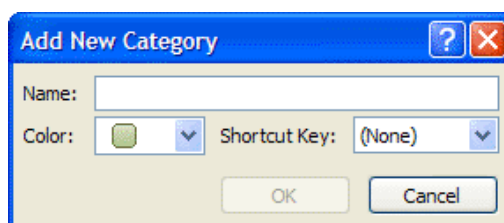


Figure 5.20. Add category in Outlook 2007

5.13.2. Create a custom category in Outlook 2002/2003

1. Open a new mail and choose in the taskbar for *options*.
2. Choose in this window (message options) for *categories*, and then for *Master category list*.
3. Type the name for the new category and add this with the *Add* button.
4. After creating the category, confirm with the *OK* buttons in the open windows.

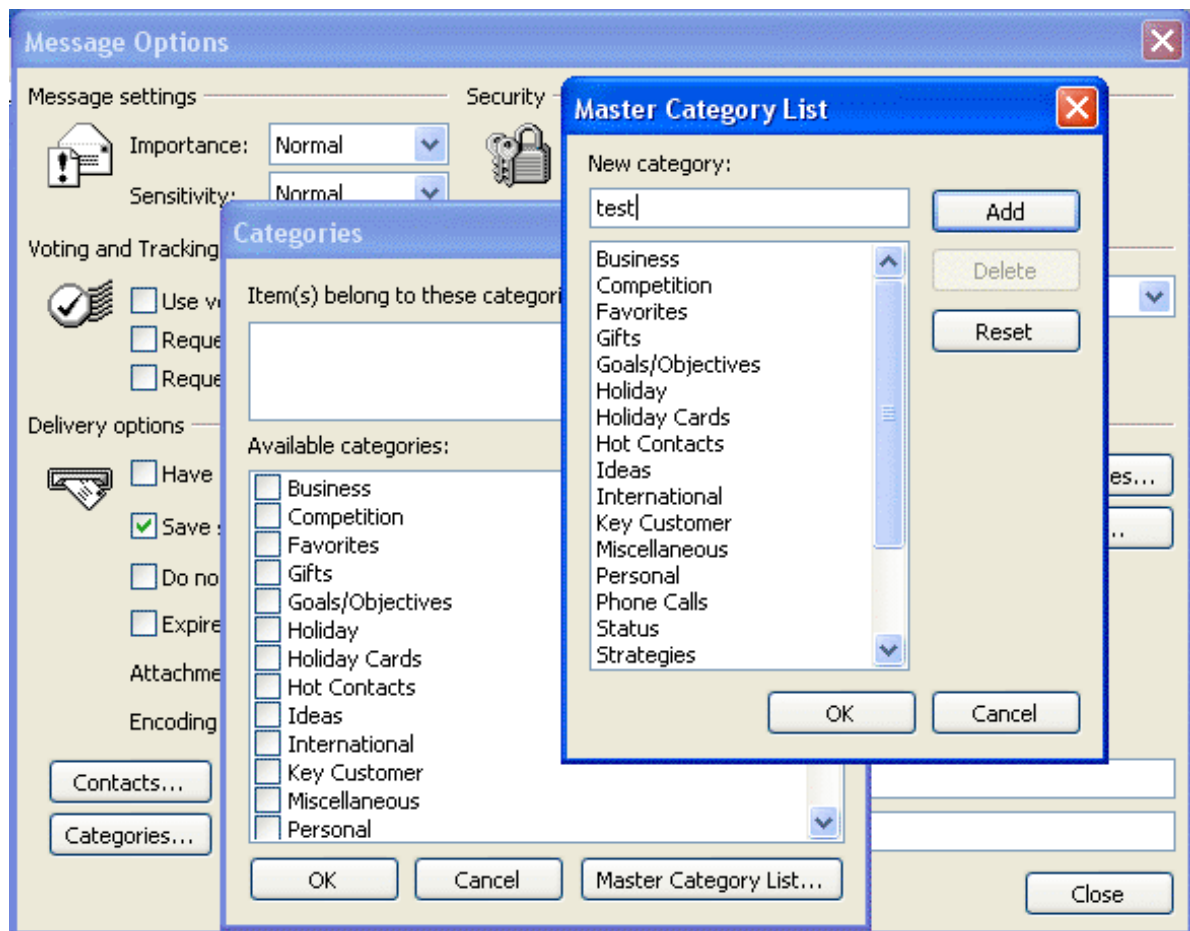


Figure 5.21. Add category in Outlook 2002/2003

5.13.3. Categorise items and sort by category

In order to categorise an item (it is possible to categorise Mail, Contacts and Appointments) right click on it, choose *Categorise* and then click on the desired category.

To order the items by category open the *View* menu, choose *Arrange by or Current View* and then *Categories*.

5.14. Mail expiration date

Since ZCP version 6.20.0 it is possible to set an expiration date for the outgoing mail.

When writing a new mail, this setting can be found under *Options > More Options*: the Message Options window will appear.

Tick the *Expires after* option and set the expiration date.

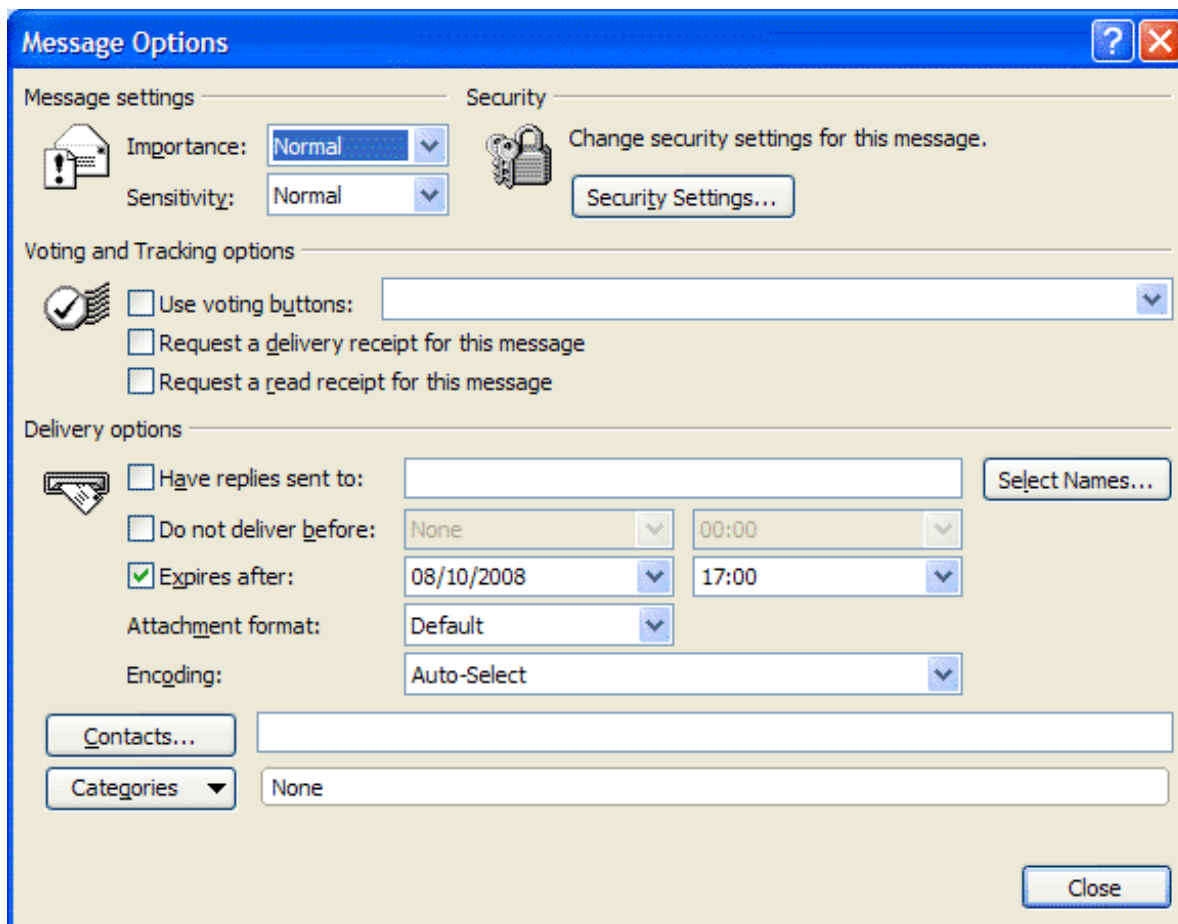


Figure 5.22. Message options

Configure Mail Clients (with IMAP and POP3)

6.1. Client configuration

Every client supporting IMAP4 or POP3 should be able to connect to Zarafa via the Zarafa IMAP & POP3 gateway.

For sending mail clients will use SMTP. The SMTP server can be the same as the Zarafa server or the SMTP server of the internet provider. Some servers need SMTP authentication. The client can store sent messages in a Sent Items folder.



Note

SMTP credentials are not necessarily the same as the Zarafa credentials.

6.1.1. Mozilla Thunderbird

This manual is based on Mozilla Thunderbird version 2. Other versions can be set up in a similar way.

The first two steps can be skipped when opening Thunderbird for the first time. The following example is for the IMAP protocol. The POP3 protocol is practically the same without steps 10 to 12.

1. Go to *Tools > Account settings...*

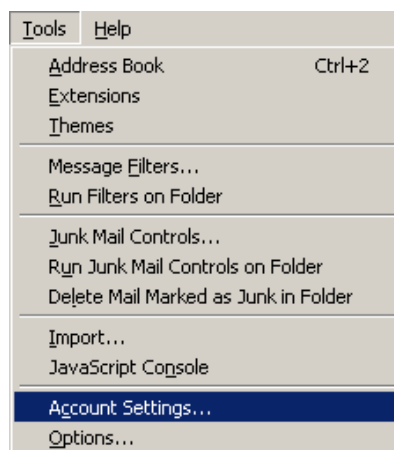


Figure 6.1. Tools dropdown menu

2. Click *Add Account*.
3. Select *Email account* and click *Next*.
4. Fill in your name and Zarafa email address and click *Next*.
5. Select *IMAP* and fill in the Zarafa server's hostname or IP address. Click *Next*.
6. Fill in the Zarafa username for the *Incoming username* and the *outgoing username*. Click *Next*.
7. The *account name* can be chosen by the user itself. Click *Next*.
8. Check the data and click *Finish*. Now close the *Account Settings* window.

9. Open the Inbox and type in your password to receive the folder structure from the Zarafa server.
10. Re-open the *Account Settings* window and select the *Server Settings* in the previously created account.
11. Set the security to the desired level (default is *Never*).
12. Select *Copies & Folders* in the account tree and set the correct foldernames for the IMAP server.
13. Finally, click *OK* and start using Zarafa with the IMAP protocol.

6.1.2. Windows Mail

This example is based on Windows Mail. Outlook Express can be configured in a similar way.

The following example is for the IMAP protocol. Setting up the POP3 protocol is practically the same; skip steps 10 to 12.

1. Go to *Tools > Accounts*.

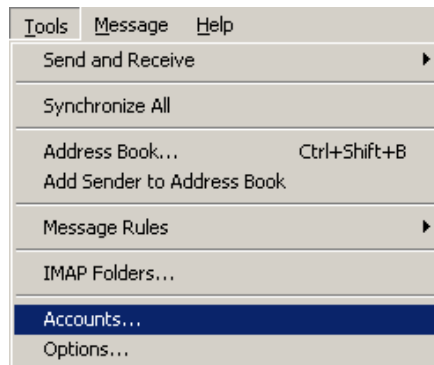


Figure 6.2. Tools dropdown menu

2. Click *Add...*
3. Select *Email Account* and click *Next*.
4. Enter the *Display Name* and click *Next*.
5. Enter the *Email Address* and click *Next*.
6. Select *IMAP* from the dropdown menu, fill in the Zarafa server's hostname or IP address and the hostname or IP address of the outgoing mailserver.
7. *Optional*: check whether the outgoing server needs authentication and click *Next*.
8. Fill in the Zarafa username in *Email Username* and the Zarafa password. Click *Next*.
9. (Un)tick whether the user wants to download the data from the server right away and click *Finish*.
10. Highlight the new account in the folder list and click *Properties* in the context menu (open by a right-click on it).
11. Select the *IMAP* tab.
12. Check whether the *Special Folders* is ticked and the folders are set the same as the Zarafa folders.
13. Finally, click *OK* and start using Zarafa with the IMAP protocol.

Configure Calendar Clients (using CalDAV and iCal)

This chapter describes how to configure the CalDAV or iCal client for using with the Zarafa server. The **zarafa-ical** gateway enables users to view their Zarafa calendars using clients like Sunbird, Evolution or Mac iCal. Since ZCP 6.40 tasks can be synchronised and created from the different clients.

To access calendar folders on Zarafa the following options are available.

For all clients *but* the Mac OS X iCal client use:

URL	Calendar
<code>http://server:8080/ical</code>	<i>User's own default calendar via ical (not recommended)</i>
<code>http://server:8080/caldav/<user>/<calendar-name></code>	<i>User's calendar in user's store. Make sure the calendar name is in the store.</i>
<code>http://server:8080/caldav/<user>/<subcal></code>	<i>User's self created subcalendar in the user's own store. Location through actual subfolders in Zarafa is irrelevant.</i>
<code>http://server:8080/caldav/<other-user>/<calendar-name></code>	<i>Other-user's shared calendar</i>
<code>http://server:8080/caldav/public/<calendar></code>	<i>Calendar folder in the public folder</i>
<code>http://server:8080/caldav/<user>/</code>	<i>User's default calendar. Although this works for most clients, this URL is not recommended.</i>

For the Mac OS X iCal client use:

URL For Mac OS X iCal client	Calendar
<code>http://server:8080/caldav</code>	<i>User's calendar list</i>
<code>http://server:8080/caldav/<other-user></code>	<i>Other-users calendar list</i>
<code>http://server:8080/caldav/public</code>	<i>Public folders list</i>

The format and capabilities of iCalendar and MAPI recurrence types are very different. The conversion of this information is not always the same, or not even possible at all at times. Following is a list of known recurring appointment types that cause problems:

Recurrence type	Description
Monthly every day of a week	Convert to weekly every day of the week
Yearly every day of a week in month x	Not supported



Note

The **<other user>** or **<user>/<calendar>** is only reachable if the correct permissions are available. Please make sure the user has not only the appropriate calendar permissions, but also "Folder visible" permissions on the mailbox of the other user.



Note

The Mac iCal client is fully tested and supported up to 10.5.6.

7.1. Mac OS X iCal Client

1. Start iCal in Finder: click *Go > Applications > iCal*.
2. Click iCal from menu and select *Preferences*.

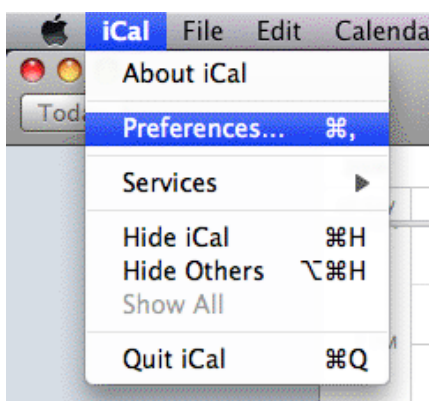


Figure 7.1. iCal dropdown menu

3. Click on '+' to create new account.

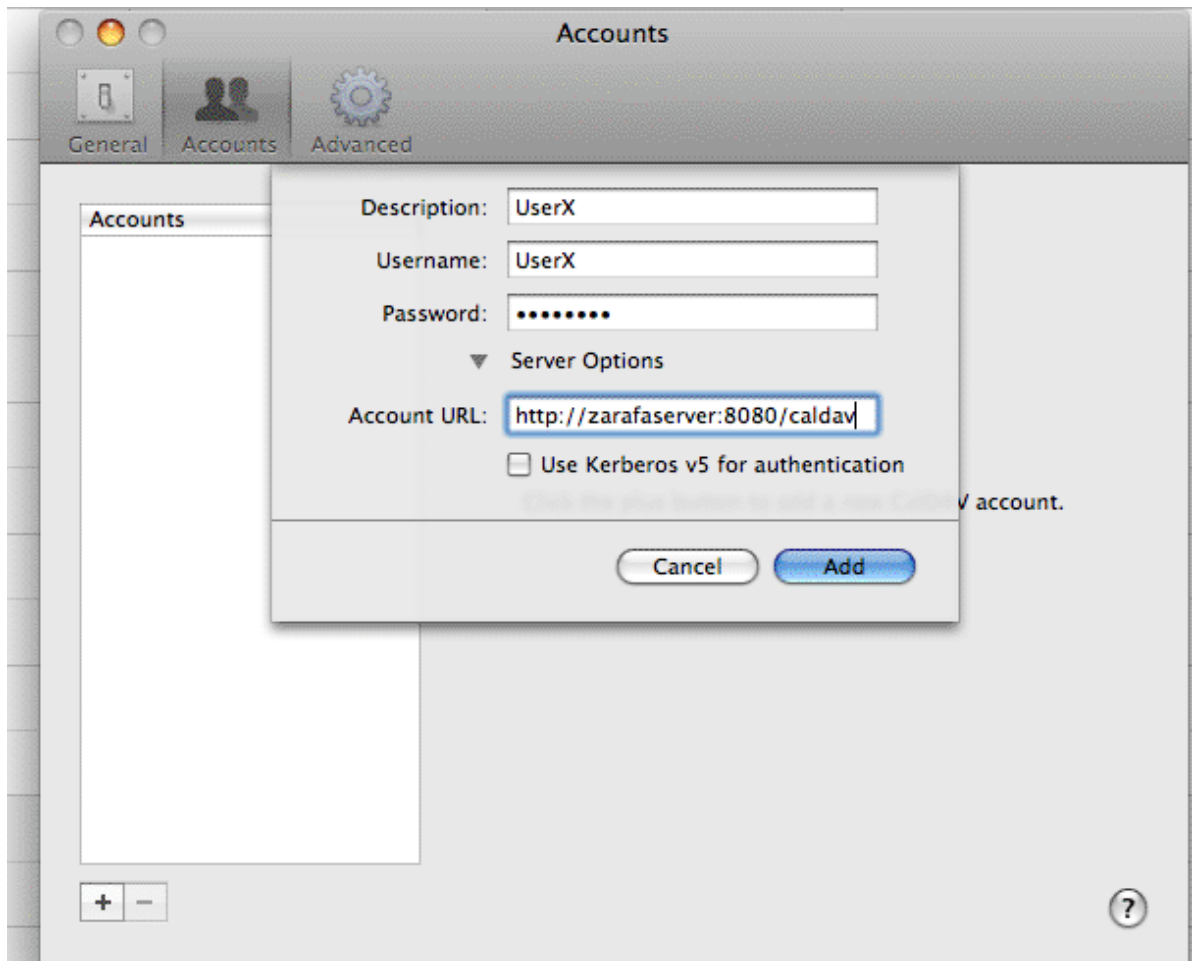


Figure 7.2. Account details

4. Fill in the details. Add server address as: **http://server:8080/calDav/**
5. Click on *Add* to retrieve the calendars of the user.

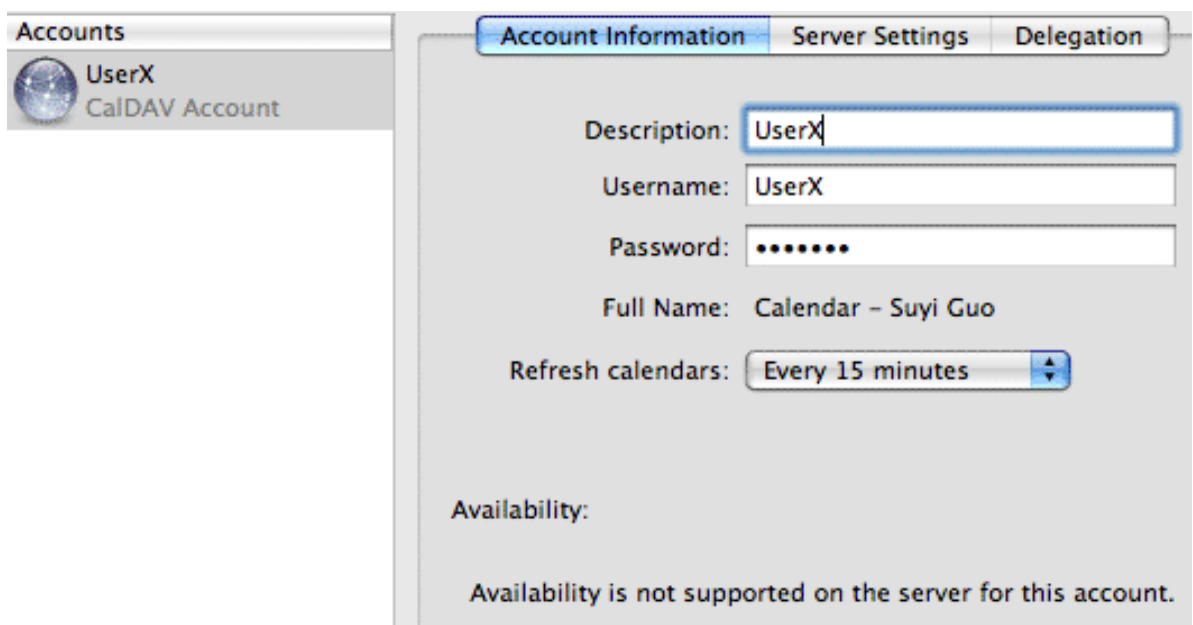


Figure 7.3. Account created

7.2. Sunbird Client Guide

1. Start Sunbird client.
2. Click on *File* in the menu bar and select *New Calendar*.
3. Select option *on the Network*. Click *Next*.

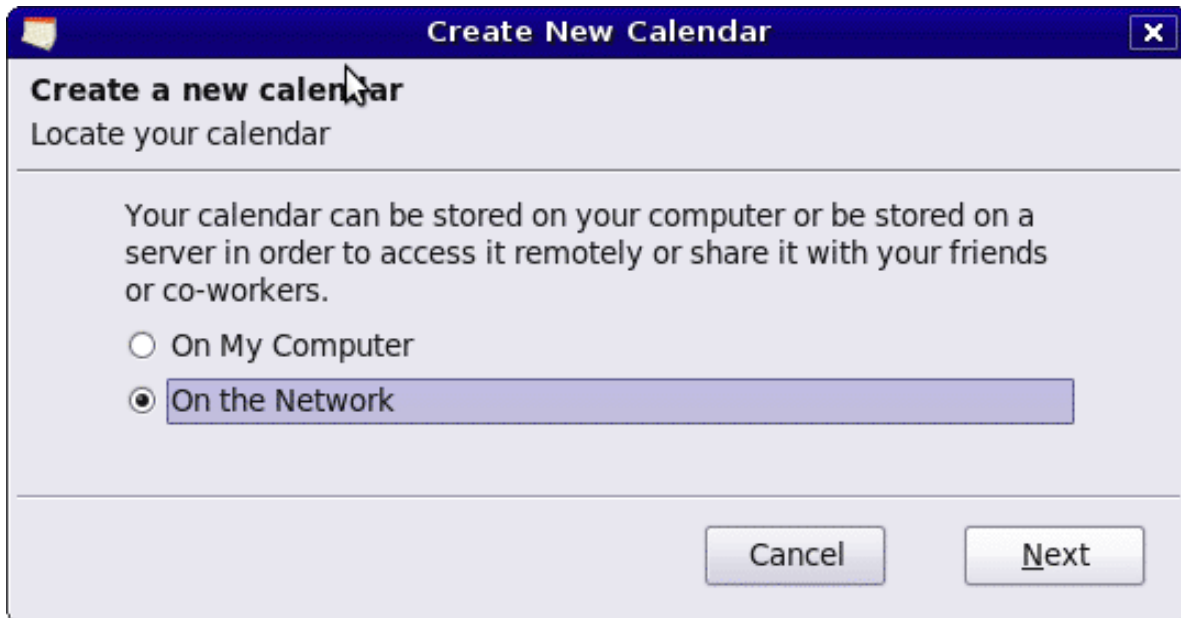


Figure 7.4. New calendar location

4. For iCalendar, select the *iCalendar* Option. Enter as location: **http://server:8080/ical**.

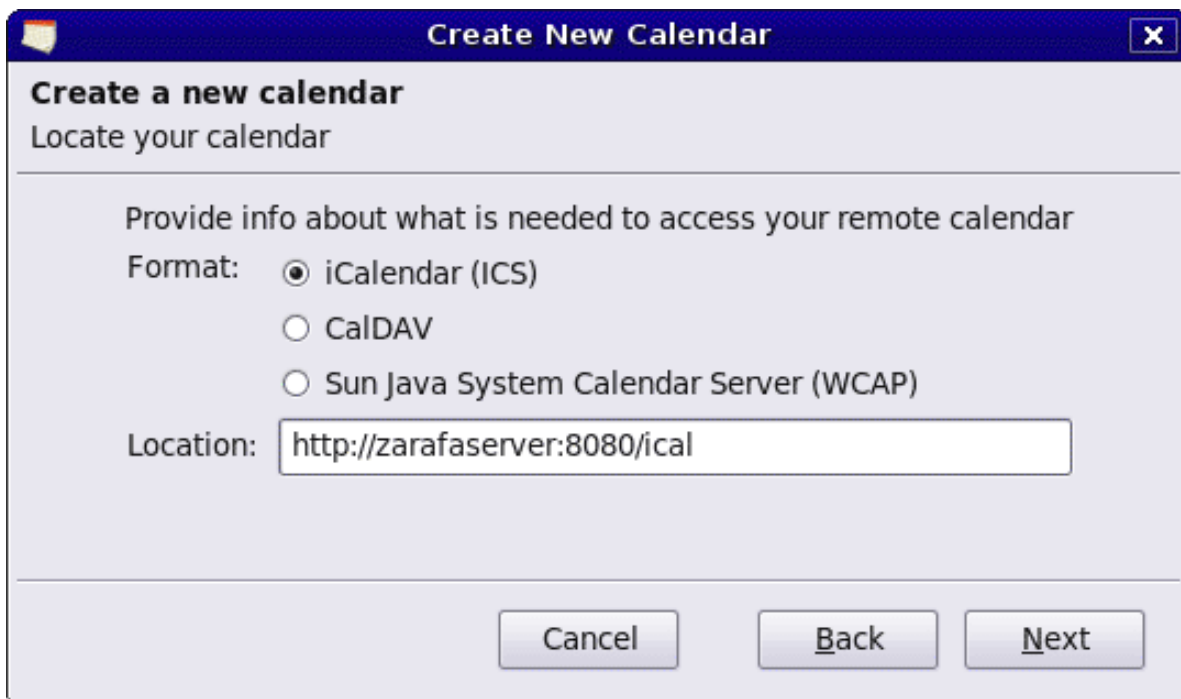


Figure 7.5. iCal details

5. For caldav, select *CalDav* option. Enter as location: **http://server:8080/caldav**.



Figure 7.6. CalDav details

7.3. Evolution Client Configuration

1. Start Evolution client.
2. Click on menu *New*. Select *Calendar*.
3. Fill in the details & remove the *Use SSL* option. The URL options are similar to Sunbird.

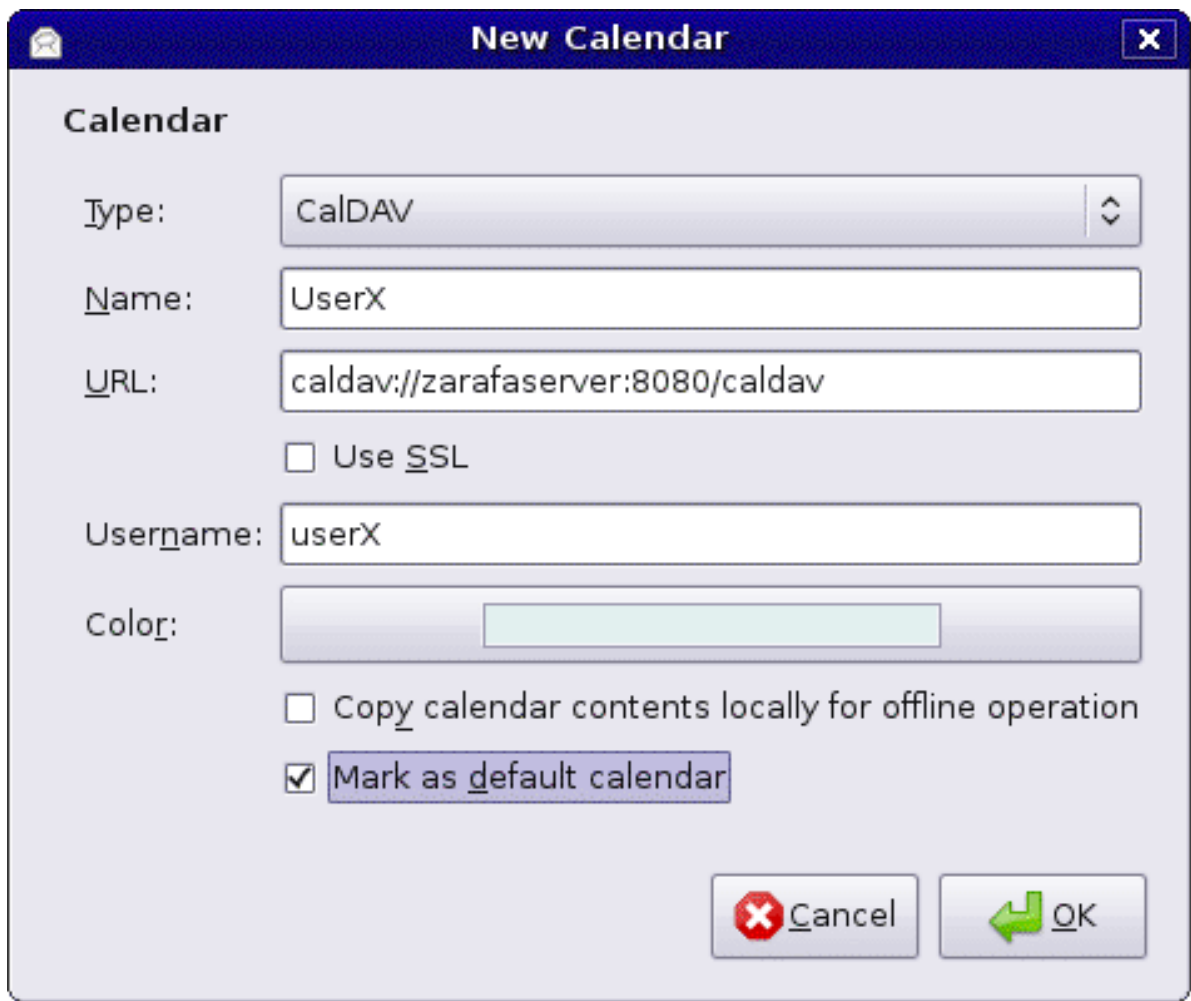


Figure 7.7. CalDav details

Configure Mobile Platforms

This chapter describes how to configure the Z-Push software to synchronise PDA's and Smartphones with a server based solution.

Z-Push is available as an opensource project on Sourceforge - <http://z-push.sourceforge.net>

8.1. Z-Push introduction

The Z-Push software allows users with PDA's and Smartphones to synchronise their email, contacts, calendar items and tasks directly from a compatible server over UMTS, GPRS, WiFi or GSM data connections. The following devices are natively supported by Z-Push:

- Apple iPhone and iPad
- Windows Mobile 5, 6, 6.1 and 6.5
- Windows Phone 7 and 7.5
- Nokia E/N-series with Mail for Exchange (M4E)
- Nokia E-series with built in ActiveSync (Nokia Mail 2)
- Android Cupcake or Donut with third party tools like Nitrodesk Touchdown
- Android Eclair with Contacts and Calendar synchronization or third party tools
- Android Froyo, Gingerbread, Honeycomb, Ice Cream Sandwich and Jelly Bean using the default ActiveSync client (Microsoft Exchange ActiveSync type account) or third party tools
- Blackberry PlayBook
- other ActiveSync compatible devices

The devices can be synchronised because the Z-Push module emulates a MS Exchange server on the server side, allowing users to synchronise without installing specialised synchronisation software on their devices.

8.2. Setting up a mobile device

It is simply a case of adding an 'Exchange server' to the ActiveSync server list by specifying the IP address of the Z-Push Apache server, disabling SSL, unless SSL has already been setup on the Apache server, setting the correct username & password (the domain is ignored, simply specify *domain* or some other random string), and then go through the standard ActiveSync settings.

Once the mobile device has been setup, it should be possible to synchronise the device simply by clicking the *Sync* button in ActiveSync.

8.2.1. ActiveSync based configuration

The following steps are made for the Pocket PC, though still applicable for WM 5/6 or Nokia's 'Mail for Exchange':

1. Open ActiveSync and select *set up your device to sync with it*.

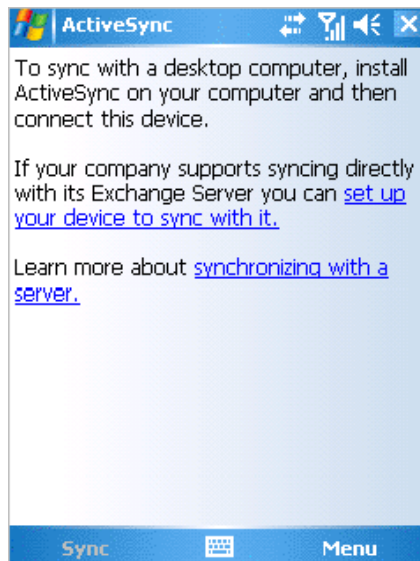


Figure 8.1. ActiveSync introduction

2. Type the server address (without http or other URL parts).

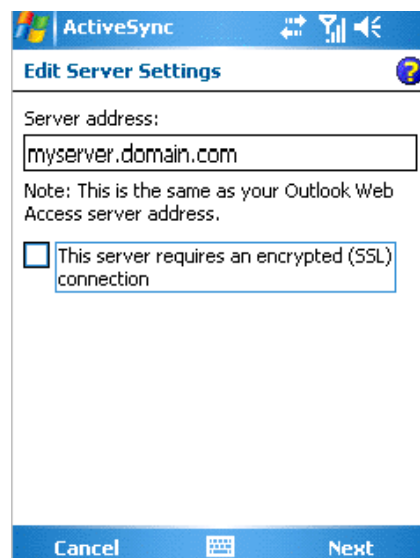


Figure 8.2. Server address

3. Specify a username and password, a domain must be specified but it is not used within Z-Push, so simply *domain* or some other random text can be specified. Select *save password* if automatic sync is preferred.

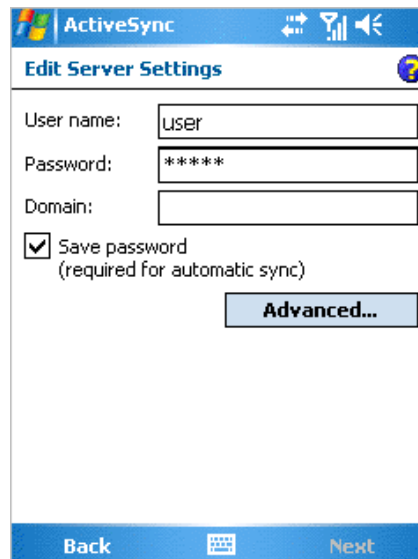


Figure 8.3. Account details

4. Select which items must be synchronised.

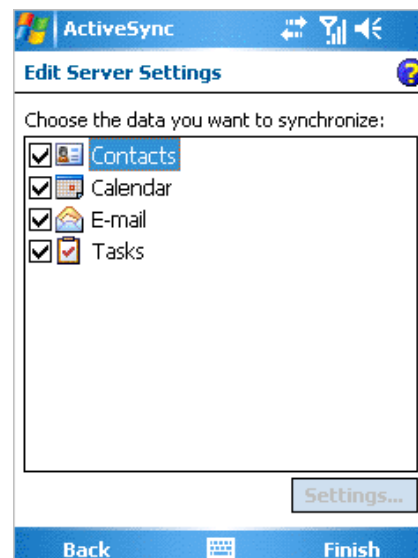


Figure 8.4. Synchronise options

5. Press *Finish* and start synchronising by pressing *Sync*.

8.2.2. iPhone based configuration

The following steps are applicable for the iPhone:

1. Open *Settings* and touch *Mail, Contacts, Calendars*.
2. Touch *Add Account...* and touch *Microsoft Exchange*.

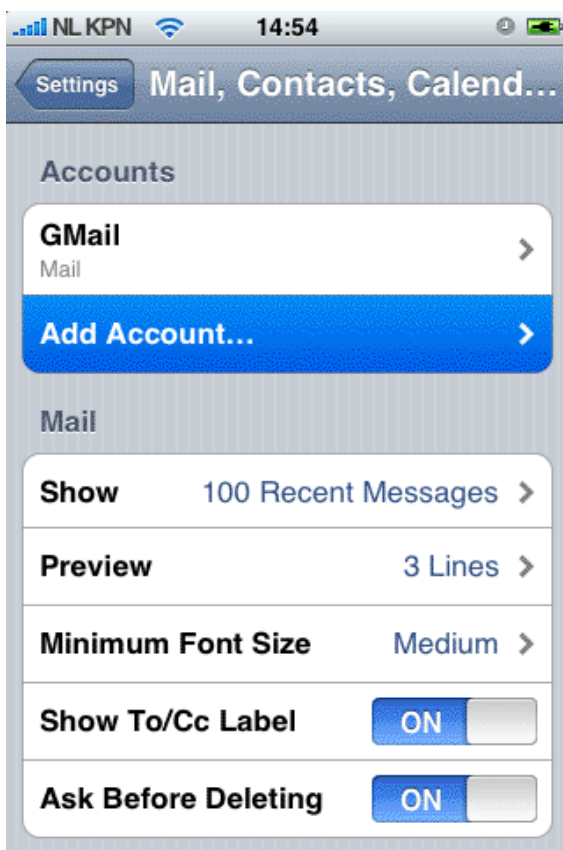


Figure 8.5. Mail, Contacts, Calendars settings

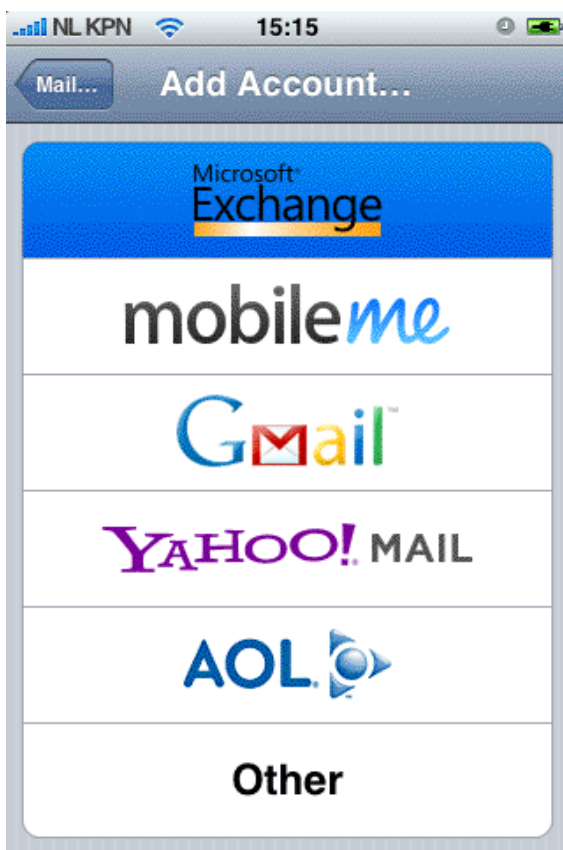
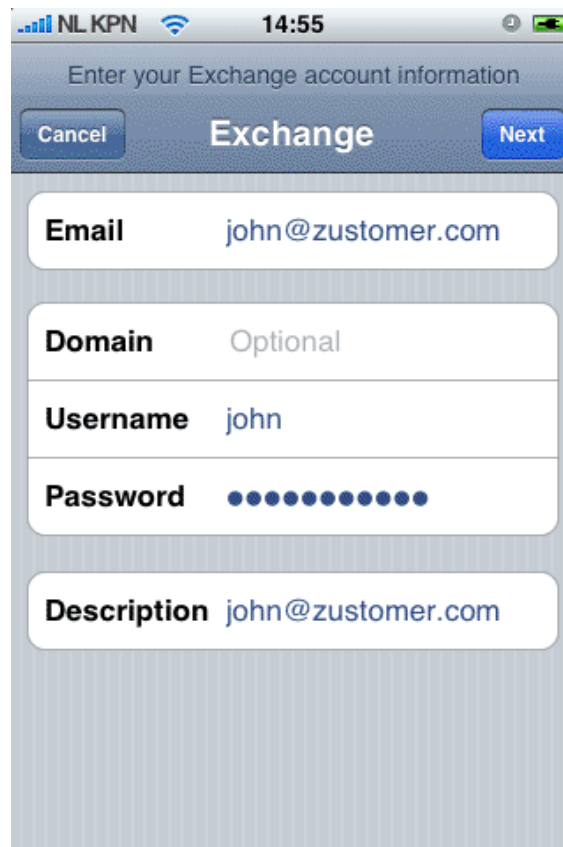


Figure 8.6. Choice Protocol/Provider

3. Enter the user credentials, and touch *Next*.



The screenshot shows an iPhone interface for setting up an Exchange account. At the top, the status bar displays 'NL KPN', signal strength, Wi-Fi, and the time '14:55'. Below the status bar, the title 'Exchange' is centered, with 'Cancel' and 'Next' buttons on either side. The subtitle 'Enter your Exchange account information' is positioned above the form fields. The form consists of five rows, each with a label and a value: 'Email' (john@zustomer.com), 'Domain' (Optional), 'Username' (john), 'Password' (represented by ten blue dots), and 'Description' (john@zustomer.com).

Figure 8.7. User settings

4. The device will try to contact the server. If the server is not equal to *zustomer.com* in this case, the connection will fail. If the server is not configured for SSL connections, the connection will fail too. The iPhone has SSL enabled by default.
5. A new option field *Server* will pop up. Enter the correct server address or IP if necessary.

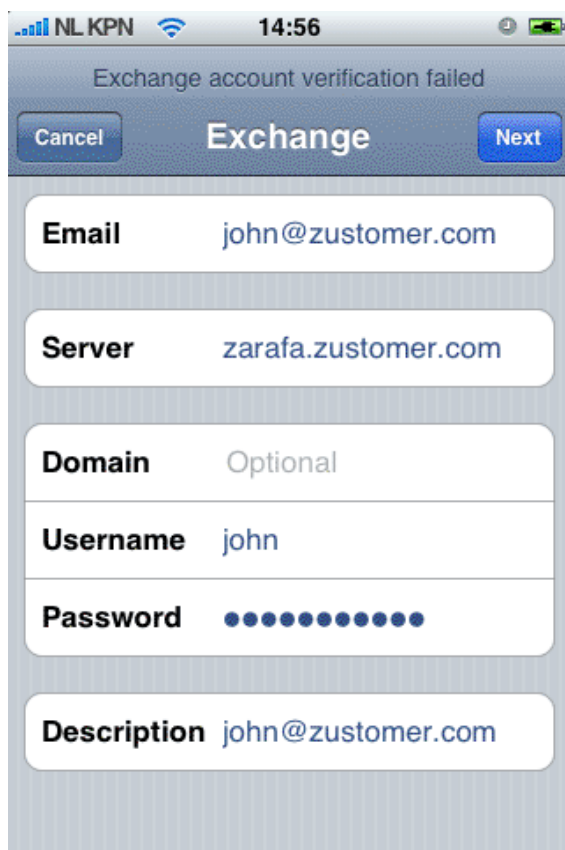


Figure 8.8. Extra server field

6. If SSL is not available the connection will fail to be established. Touch *Save* in order to keep the current account settings. Go to the just created account and touch *Account info* and disable *Use SSL*.

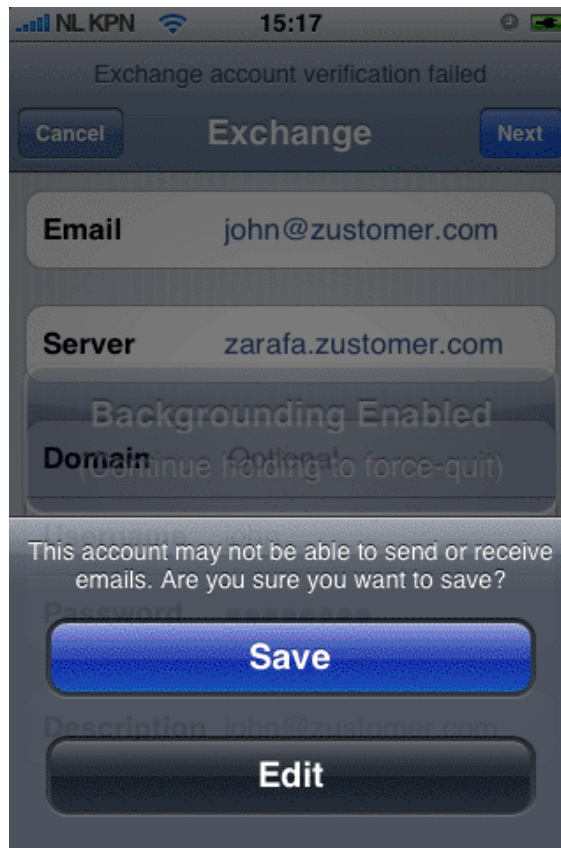


Figure 8.9. Save settings

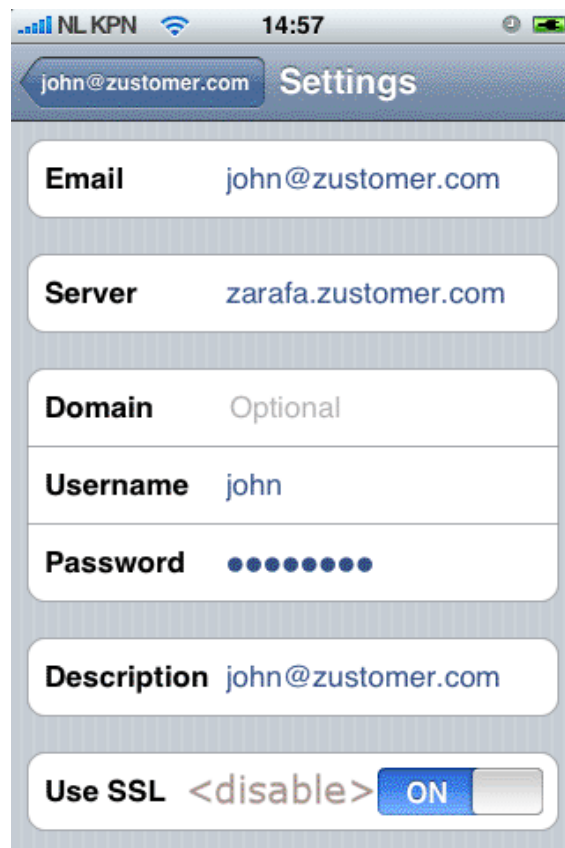


Figure 8.10. Account settings

