

# Proko2 Doc3

Rev. 1.33

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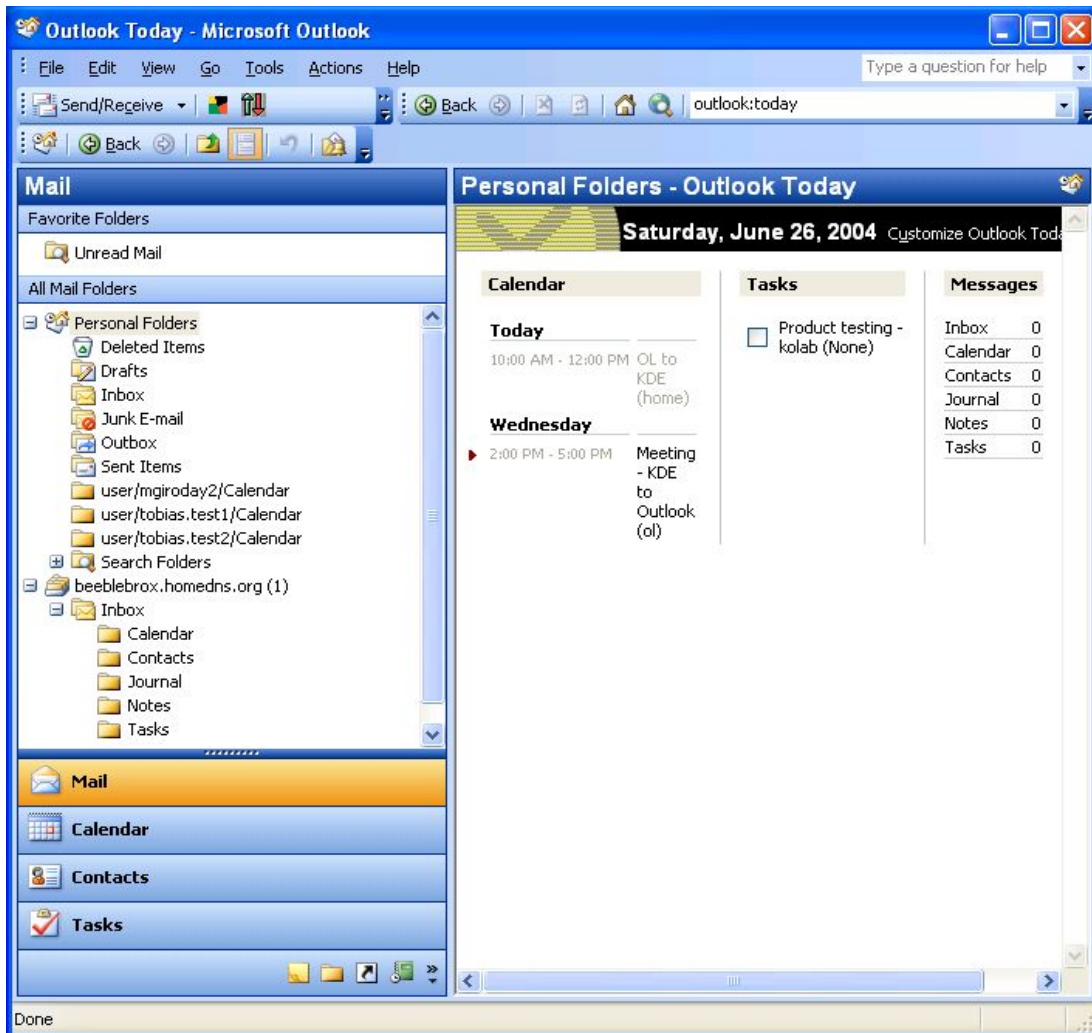
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The Outlook client configured to work with Kolab



The screen shot above gives us an overview about our Kolab folders on the beebilebrox.homedns.org Kolab2 Server.

# Windows client installation

## 1. Software Installation

### a. Requested software

- Microsoft Outlook 2003: proprietary software and part of the Microsoft Office suite.
- Toltec Connector: Toltec Connector is a proprietary plug in for Microsoft Outlook. It enables Outlook to use a Kolab Server as storage and Version 2 makes use of the Kolab2 XML storage format.

### b. Install

Begin by installing Outlook 2003 from your Microsoft CD ( default installation ) and configure Outlook as described below before installing and configuring Toltec Connector.

## 2. Configuration

To configure Outlook for using it with the Kolab server, you need:

- a personal folder (PST) file
- an E-mail account
- an Internet Directory Service (LDAP)
- to configure your Calendar Internet free busy Options.

We will describe those points step by step in the following paragraph.

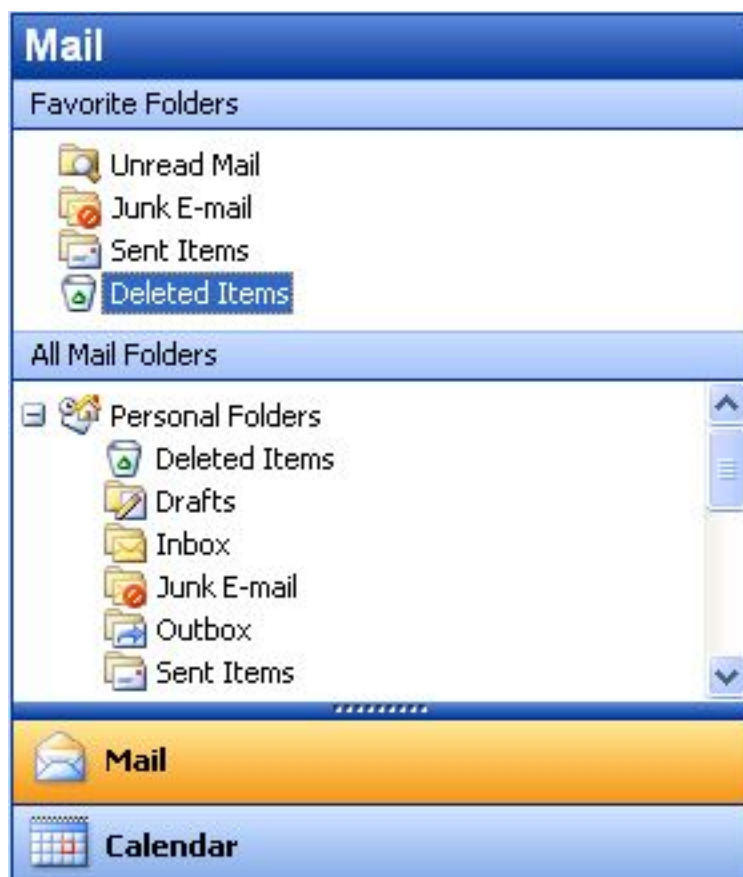
## a. Outlook 2003

### 1. Personal folder file

Items you create and receive in Outlook are stored in personal folder (PST) files.

We will map this file with the Toltec Connector later on during this tutorial and therefore don't need to create a new one.

By default, after the installation this file is named Personal Folders and appears at the top of the folder list (screen shot below).



The Outlook mail folders view

## 2. Create E-mail accounts

Outlook provides a wizard for adding, setup and configuration of E-mails account.

Start the wizard by choosing *Tools -> E-mail Accounts* from Outlook main tool bar.

Select *'Add a new e-mail account'* and click *'Next'* to proceed.  
Choose *'POP'* for *'Server Type'*.

Click the *'Next'* button to access the Internet E-mail Settings page and fill in the requested informations as shown below, by typing your own data.

**Note:** Your *User Name* is the UID of your user account on the Kolab server. By default this *Unique Identity* is your *Primary Email Address*, but could be different. (check your user account on the Kolab server if you are not sure about your UID).

**E-mail Accounts**

**Internet E-mail Settings (IMAP)**  
Each of these settings are required to get your e-mail account working.

User Information	Server Information
Your Name: <input type="text" value="Michel Giroday"/>	Incoming mail server (IMAP): <input type="text" value="beebledbrox.homedns.org"/>
E-mail Address: <input type="text" value="mgiroday1@beebledbrox.hc"/>	Outgoing mail server (SMTP): <input type="text" value="beebledbrox.homedns.org"/>

**Logon Information**

User Name:

Password:

Remember password

Log on using Secure Password Authentication (SPA)

**Warning:** We do not recommend to Store your password in the configuration file, for security reasons.

**Note:**

The Kolab server Host Name should be registered as both Incoming (POP) and Outgoing (SMTP) mail server.

**Note about Unique identity (UID):**

Your User Name is by default identical to the email address for your Kolab account if no UID (Unique Identity) was registered by the administrator when creating your account on the Kolab server.

**Tips:**

Try to login on the Kolab Webinterface to confirm that you have access with these credentials.

Click on the More Settings... button to complete the E-mail accounts configuration and setup the authentication for both the Outgoing and the Incoming server.

**General page**

The screenshot shows a window titled "Internet E-mail Settings" with a close button in the top right corner. The window has four tabs: "General", "Outgoing Server", "Connection", and "Advanced". The "General" tab is selected. The "Mail Account" section has a text input field containing "beebilebrox.homedns.org (1)". Below it, the "Other User Information" section has two input fields: "Organization:" with the value "Klarälvdalens Datakonsult AB" and "Reply E-mail:" which is empty.

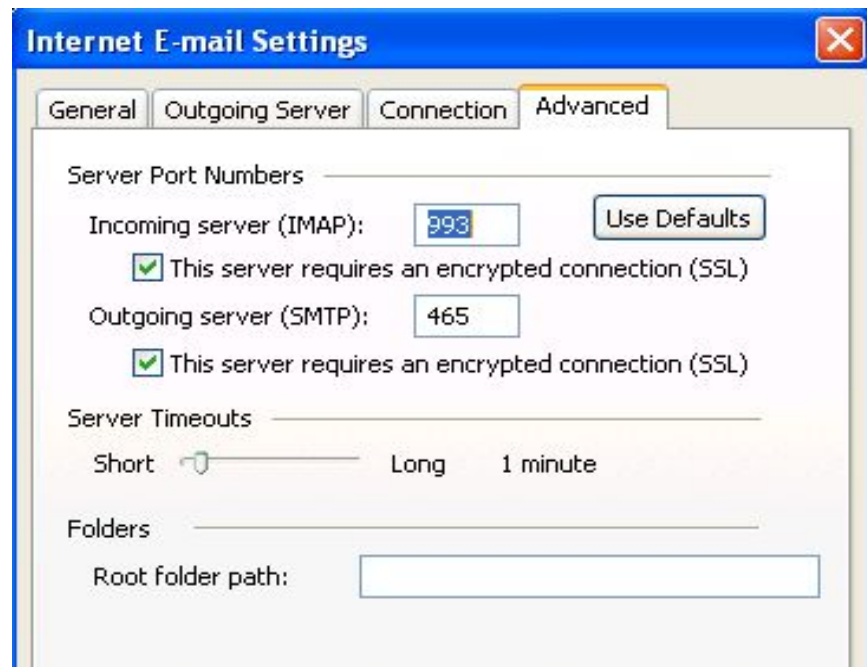
**Set up example - General Settings**

General settings are identical to the standard settings for your office server (see view above).

**Outgoing Server**

Use the same data as described for the incoming mail server above.

## Advanced



### Set up example - Advanced Settings

Select the SSL option for both Incoming and Outgoing connection.

#### **Note:**

You can also use the Port 25 for the outgoing SMTP server, because TLS is enabled on that port and supported by the Kolab server.

You now should be able to test this settings successfully with the example email.

## 3. LDAP – Internet Directory Service

1. Start the wizard – same wizard as for E-mail accounts - by choosing

Tools -> E-mail Accounts from Outlook main tool bar.

2. Select 'Add a new directory or address book' and click 'Next' to proceed.
3. Choose 'Internet Directory Service (LDAP)' and continue the wizard to access the 'Directory Service (LDAP) Settings' page.

Type your Kolab server host name in the 'Server Name' field in the 'Server Information' part of this page.

"Logon Information" are not needed here.

**E-mail Accounts**

**Directory Service (LDAP) Settings**  
You can enter the required settings to access information in a directory service.

**Server Information**  
Type the name of the directory server your Internet service provider or system administrator has given you.  
Server Name:

**Logon Information**  
 This server requires me to log on  
User Name:   
Password:   
 Log on using Secure Password Authentication (SPA)

### Set up example – Directory Service Settings

Click on the 'More Settings...' button to complete your LDAP configuration.

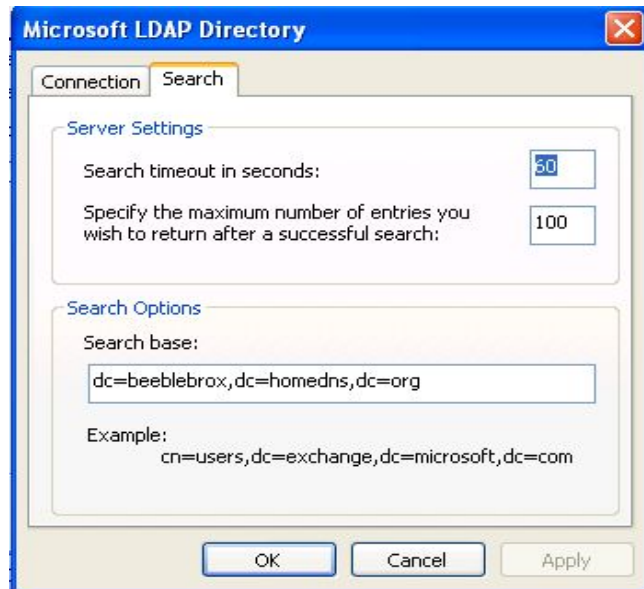
### Connection page





Fill the *'Display Name'* field with the Host Name of your Kolab server.

### Search page



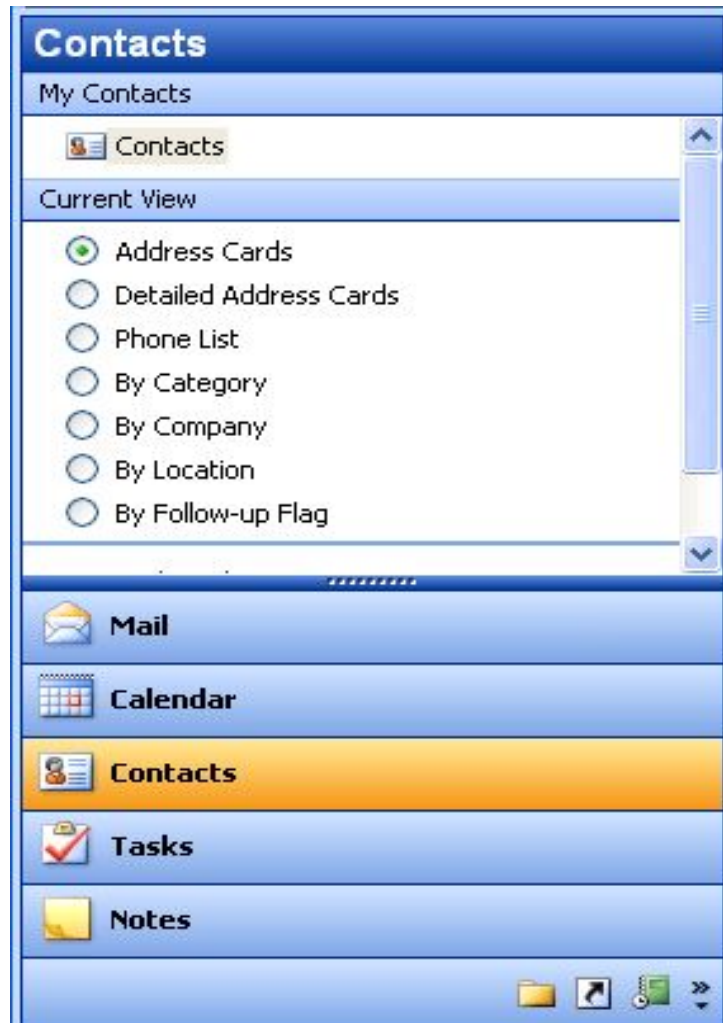
The Search base of your Kolab server should be entered as shown in the example above by adding before each part of your server host name *'dc='* (first part) or *','dc='* for the other parts.

### Example – LDAP search

Your LDAP settings being done, let us try and search addresses from

the Kolab server.

Click on the Contacts icon in order to display Outlook Contacts -view.



From the main tool bar menu choose '*Tools -> AddressBook*' which will display the Address Book dialog.

In the Address book dialog there is a Field labeled '*Show Names from the:*', select your Kolab server from the different sources listed there as we want to search the Kolab server.

Choose from the Address Book dialog menu '*Tools -> Find*' and in the

Find dialog enter your search conditions (see below):

Find dialog box showing search criteria:

- Display name: gi
- First name: [empty]
- Last name: michel
- Title: [empty]
- Alias: [empty]
- Company: [empty]
- Department: [empty]
- Office: [empty]
- City: [empty]
- Phone number: [empty]

Substring Matching options:

- Begins with
- Contains

Click OK, to display the search result into the Address book dialog.

Address Book window showing search results:

Name	E-mail Address	E-mail Type
Giroday Michel	michel.delagiroday@t...	SMTP
giroday michel	mgiroday@beeblebro...	SMTP
giroday1 michel1	mgiroday1@beeblebr...	SMTP
giroday2 michel2	mgiroday2@beeblebr...	SMTP
giroday3 michel3	mgiroday3@beeblebr...	SMTP
giroday4 michel4	giroday4.michel4@be...	SMTP

#### 4. Calendar Free/Busy set up

Free/busy information is used by people sending event requests, to determine a time when their correspondent is available.

Notice that this information can only serve as a hint for a good appointment time. Setting up Free/busy information to work with the Kolab server is done in the 'Preferences' page of the 'Options' dialog in Outlook 2003.

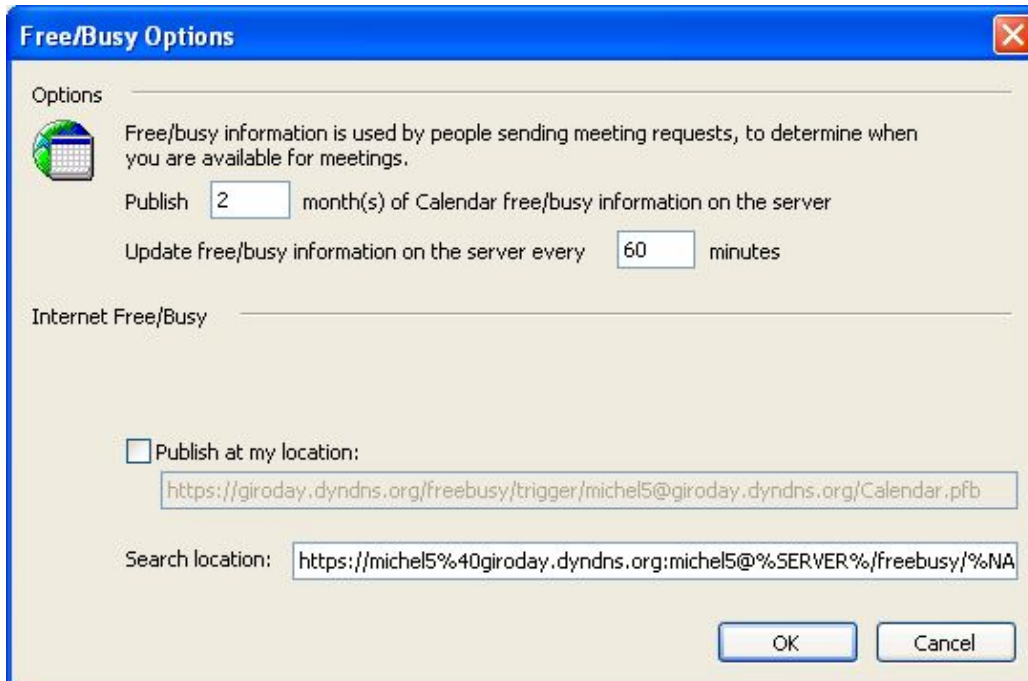
Display the Option dialog by choosing from the Outlook main tool bars:

*Tools -> Options.*

*Choose 'Calendar Options...' and select 'Free/Busy Options...'*

Fill in your own preferences in the Options part of the 'Free/Busy Options' dialog.

In the 'Internet Free/Busy' section of the same dialog, enter the correspondent URL for the "Search location" as shown in the screen shot below:



**Calendar Free/Busy Options dialog**

**Read:** `https://<userName>:<passwd>@<serverName>/freebusy/%NAME%@%SERVER%.ifb`

\* Notice: All reference to "@" in <userName> has to be replaced by "%40", se screenshot above.

Uploading is not necessary with the Kolab2 server. <serverName> must be the complete server name, do not leave out the domain part. For https make sure that the certificate is trusted by Windows (see tips below).

**Kolab Free Busy Generation:**

In order to use Kolab2 server Free/Busy functionality, and to let others get access to your own free busy information, you need to enable this feature as follow:

From Outlook Mail view, in the Main Menu select:

- “Tools ->Options” to display the “Options” dialog and choose the
- “Toltec Connector” page.
- Click on the “Options” button, that will display the “Toltec Message Store Options” windows, and check the **Enable Generation** option.

You may configure yourself the groups that will be allowed access to your Freebusy information, by clicking on the *Kolab Free Busy Generation* “Settings” button and select its “Audience” (as shown below).



**Notice:**

By default the FreeBusy Information Audience will be set to the Administrator group.

**Tips:**

If you experience problems with Outlook failing to retrieve free/busy information, or producing error messages about the URL being used at this purpose.

The problem may be that Outlook checked the certificate, found it untrusted and did not bother to ask the user if he want to download freebusy anyway.

In this case:

Install Service Pack 1 for Outlook 2003 and import the CA certificate from the kolab server into Windows.

Mini-Howto install the CA certificate:

Copy /kolab/etc/kolab/ca/cacert.pem from the kolab server to the windows box and rename it to cacert.cer.

Then double-click it and follow the *“Install Certificate”* wizard.



## 5.Example – Delegating

To Delegate to someone is to let this user use your Primary Email address to send emails.

This is useful in case you let somebody else administrate your calendar for example (secretary).

Putting another user in your delegation field means you have to trust this user. The delegated user cannot be an external user.

**Note:** *If you want your secretary to distribute invitations on your behalf, you will also need to give her write access to your calendar folder.*

**Server Side (Owner of the account – Manager – Maintainer)**

Log into the “*My User Settings*” page of the **Kolab2** server web interface using your Username (Primary Email Address or Unique Identity) and Password.

Register the email address of the user you want to delegate to.



The screenshot shows a web interface with a label 'Delegates' on the left. A text input field contains the email address 'michell1@giroday.dyndns.org'. To the right of the input field, there is a vertical scrollbar and a note that says 'One Email address per line'.

### **Client Side (Outlook)**

Open a new email account with the other's name and email address  
Select the other's account when sending.

### **6.Example – Working with groups**

The Kolab2 server makes it possible to work with Groups. A group is a collection of users, each member having her own access rights to the group shared calendar as attributed by the owner of the group (e.g Leader – all permissions, others read only).

As for a single user, automatic invitation handling is configurable by means of the server web interface.

#### **To create a Group:**

##### **Server side:**

Login as Manager or Maintainer (Kolab2 server web interface )

- In the Users page, choose Create a new user.
- Register the data relative to the group as shown below.

Attribute	Value	Comment
First Name	Group1	Required
Last Name	Testers1	Required
Password		Leave blank to keep password unchanged
Verify Password		Leave blank to keep password unchanged
Primary Email Address	testers@giroday.dyndns.org	Non volatile
Unique Identity (UID)	testers@giroday.dyndns.org	Optional - Defaults to Primary Email Address
Mailbox Home Server	giroday.dyndns.org	Non volatile
Account Type	Group Account	NOTE: An internal user is a user that will not be visible in the address book
Invitation Policy	Anyone	For automatic invitation handling
		NOTE: For regular accounts to use this feature, give the 'calendar' user access to the Calendar folder

**Note:**

- The account type is set to “Group Account” and automatic invitation handling are configured to “Reject if conflicts”. The Kolab2 server will take care of accepting (if no conflict with other appointments) or rejecting the invitations sent to the group.
- If you want some members of the groups to be able to send emails using the group identity you have to register their email addresses into the Delegates fields.(see [Delegating](#))

**Group sharing all folders (Outlook client).**

The Outlook client will only handle new mail when those are downloaded via POP3 (read the following section about how to handle this special case).

Let us create a group as described above on by means of the Kolab2 web interface but without configuring automatic handling.

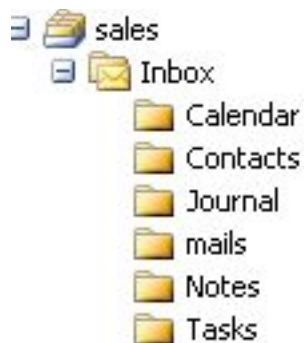


## Client Side (Outlook client)

In order for the group to share the standard Imap folders listed above, we need to trigger the folder creation after having completed the following steps:

- Add a new Email Account (IMAP/SMTP) using the group's data by running:  
*Tools -> E-Mail Accounts -> Add a new Email account.*
- Map this account to the server using the Toltec Connector wizard by running:  
*Tools -> Options – Tab Toltec Connector – New*
- Synchronize to the server in order to trigger the standard imap folders creation.

Your Folder view should look as shown below (group sales):

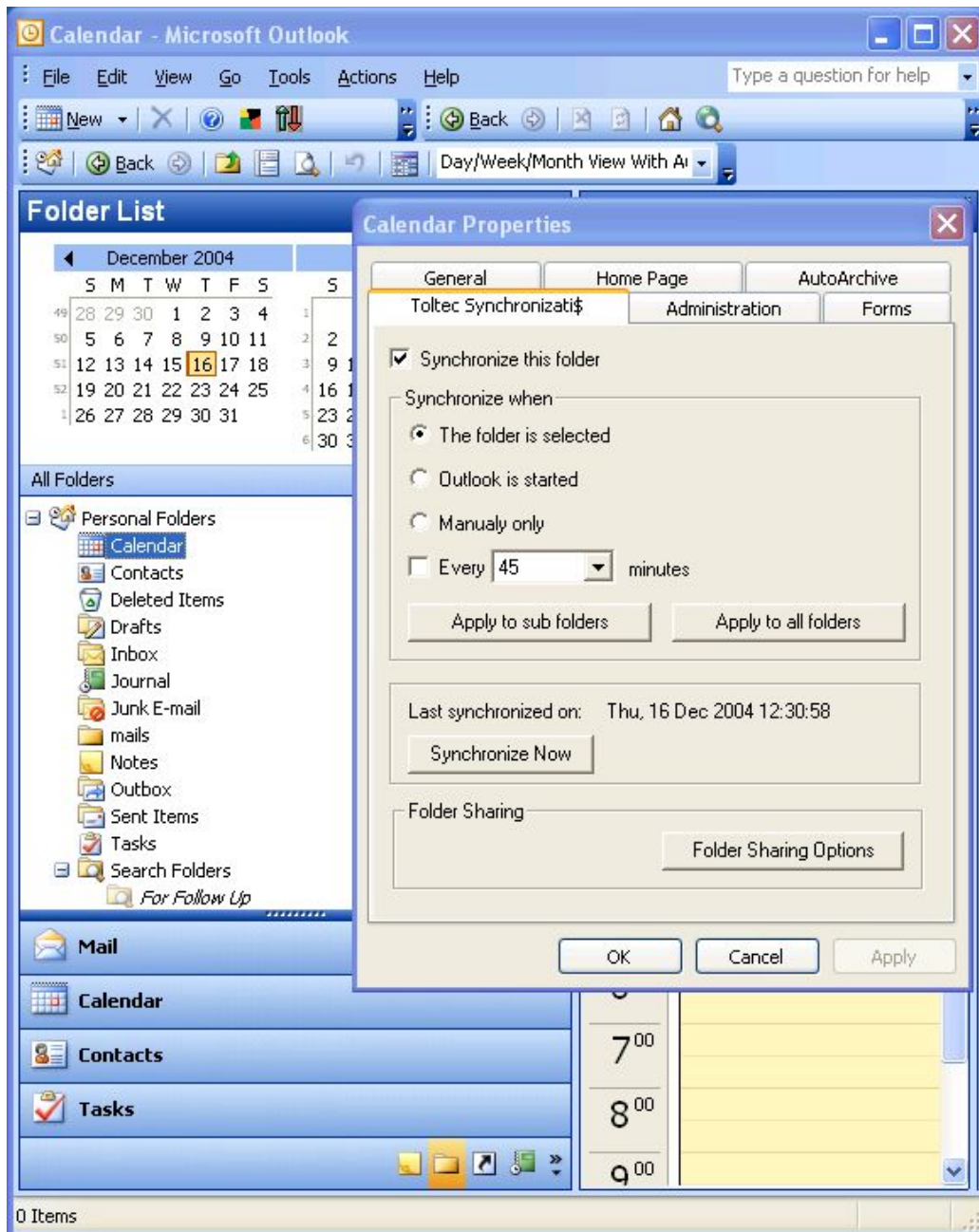


We now need to register the members of the group and give them permissions for each folder we want them to share together. In this example we want to share all the standard folders.

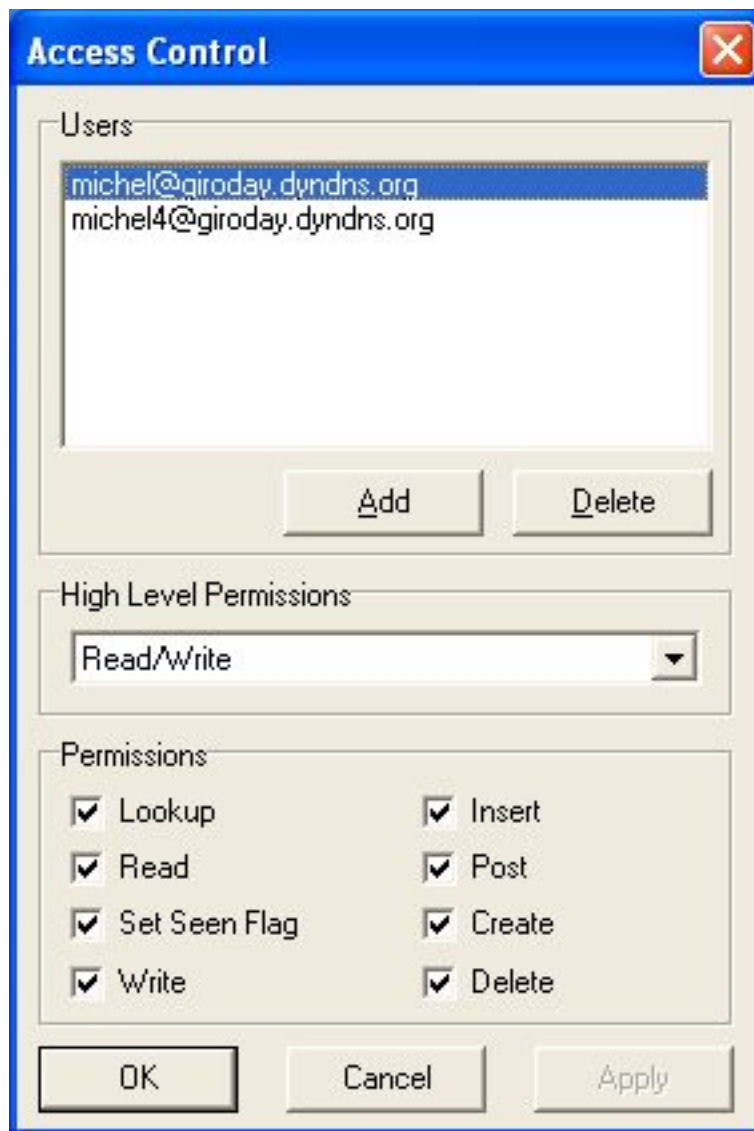
The folders in our scenario are mapped to the Personal Folders pst file by means of the Toltec Connector wizard.

To share the group's folders execute the following steps for each of them:

- Right click on the Folder's Icon in the Personal Folders list
- Choose Properties
- Select the Toltec Synchronisation tab



- Click on the Folder sharing Options button of the Properties dialog
- Fill in the Access Control dialog which is displayed



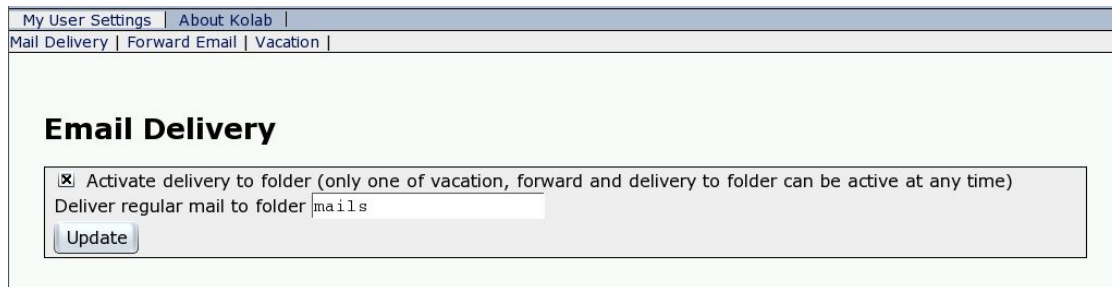
**Note:**

The Outlook client will only handle new mail when those are downloaded via POP3. For the Outlook members of the group to be able to handle mails we need to redirect the mails addressed to the group Inbox into a manually created folder, which I call "mails" here (see view above). The Kolab2 server run a script that copies any new mail that is not iCal mail to this "mails" folder. "mails" and iCal emails stay in the original INBOX in case someone wants to get it with POP3.

Repeat the operation above for each folder inclusive the manually created "mails" folder.

To redirect the mails addressed to the group default Inbox into our “mails” folder, we have to login as the group user into the Kolab2 server web interface and execute the following steps:

- Choose the *My User Settings / Mail Delivery* section
- Activate delivery to folder
- Enter the name of the folder you want the mail addressed to the group to be delivered to (in our case mails).



My User Settings | About Kolab |

Mail Delivery | Forward Email | Vacation |

### Email Delivery

Activate delivery to folder (only one of vacation, forward and delivery to folder can be active at any time)

Deliver regular mail to folder

**Note:**

As specified on the web interface you can only activate one of the following option at the same time.

- Mail Delivery
- Forward Email
- Vacation

Your group is now configured and members using both KDE clients or the Outlook client will be able to handle mails.

**Note:**

When using Outlook, you need a new profile in order to be able to send emails using the group identity.

Open a new email account with the Group name and email address

Select the Group account when sending.

**b. Toltec connector**

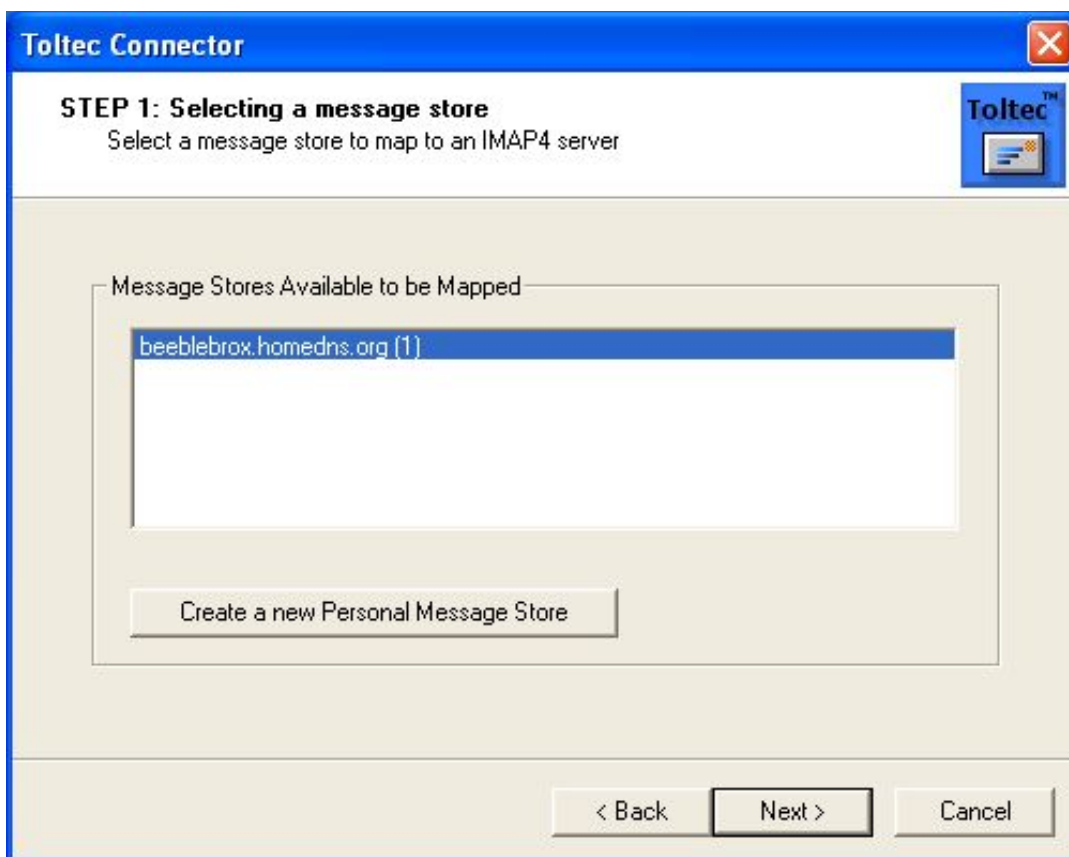
Toltec Connector is middle ware that enables Microsoft Outlook to use an IMAP4 server (in our case the Kolab server), and in Version 2 allows the Outlook client to share calendar information, individual folders and contacts with other Kolab clients by speaking the Kolab2 XML storage format.

After you have installed the Toltec Connector, you need to activate it with a license key. Start Outlook, and select '*Help/About Toltec connector*'. Then you click on the button '*Load a license key*'.

After your Toltec Connector is activated, you have to configure a connection to the kolab server.

In order to do that, select in the menu '*Tools/Options*', select the tab labeled '*Toltec Connector*'. Click on the '*New*' button to map your Personal folder to the Kolab server this will display the Toltec Connector wizard which will assist you during this setup operation.

### Running the wizard



Select your existing Personal folder file or create a new one.

Proceed to 'Step 2' (Toltec Connector wizard) by clicking on the 'Next' button to register the IMAP connection information.

As shown in the screen shot below register your Kolab server host name and your Kolab account user name and password.

**Note:** The "User Name" is the UID of your user account on the Kolab server. By default this *Unique Identity* is your *Primary Email Address*, but could be different. (check your user account on the Kolab server if you are not sure about you UID).

**Toltec Connector**

**STEP 2: Server & User Information**  
Enter the IMAP4 connection information

Server Information

Host Name: beeblebrox.homedns.org

User Information

User Name: mgiroday1@beeblebrox.homedns.org

Password: \*\*\*\*\*

Security & Authentication

Encrypt Connection with TLS/SSL (This is strongly recommended)

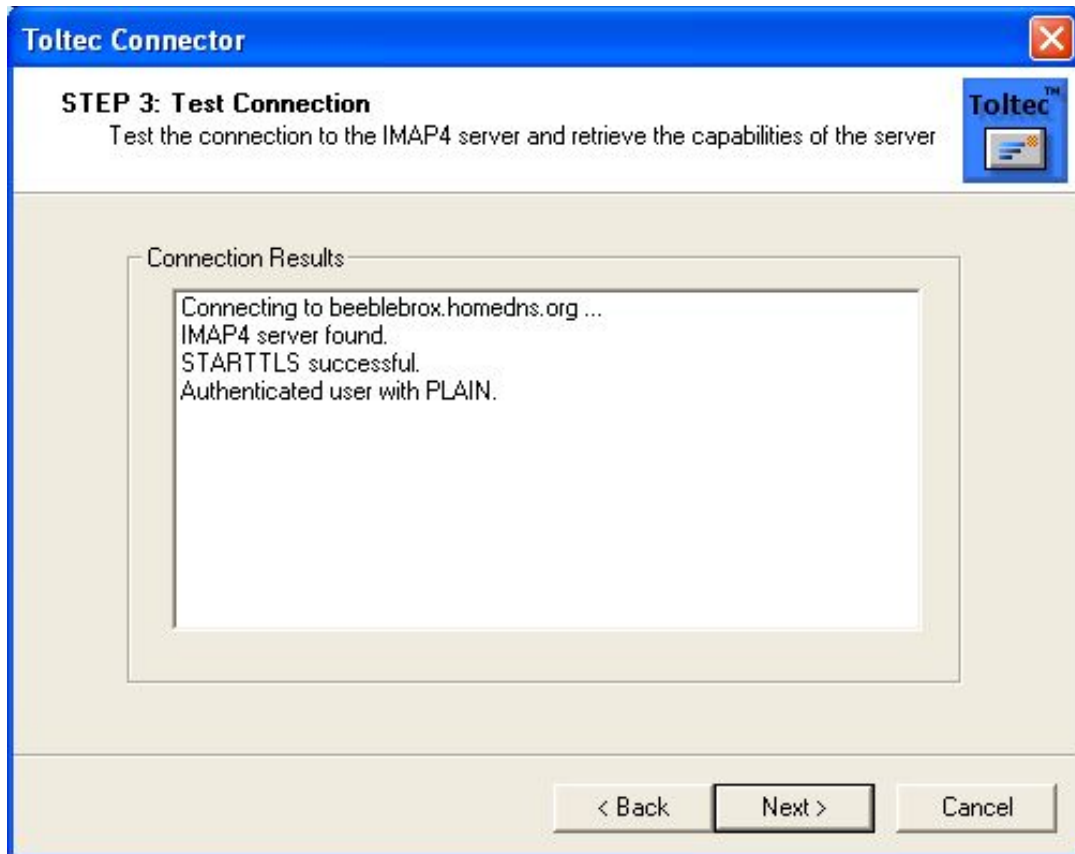
< Back   Next >   Cancel

Select Encrypt Connection with TLS/SSL, both are supported by the Kolab server.

The following step of the Toltec wizard test the connection between your Outlook client and the Kolab server.

You should get a similar result as presented in the following screen shot if everything is in order.

If you get an error at this point check with the server administrator that it is up and running or review and correct your configuration above (server and user information).

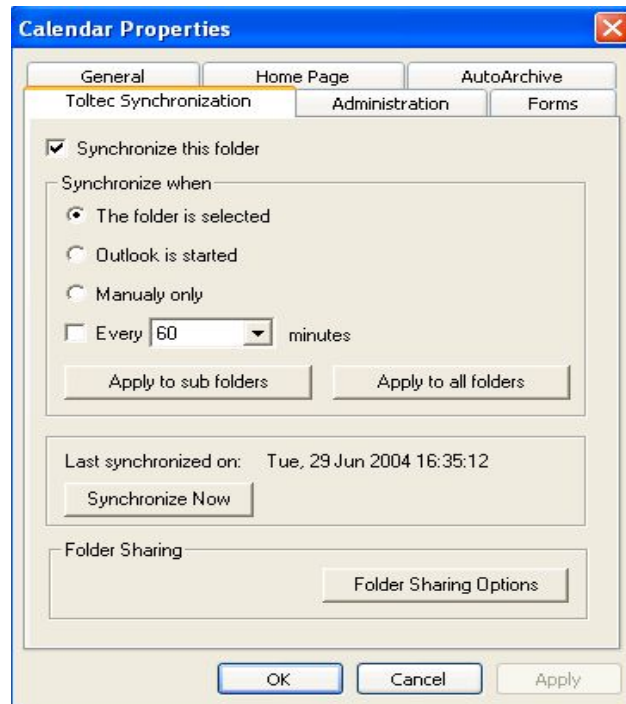


Click 'Next' to confirm your configuration and 'Finish' to conclude the wizard.

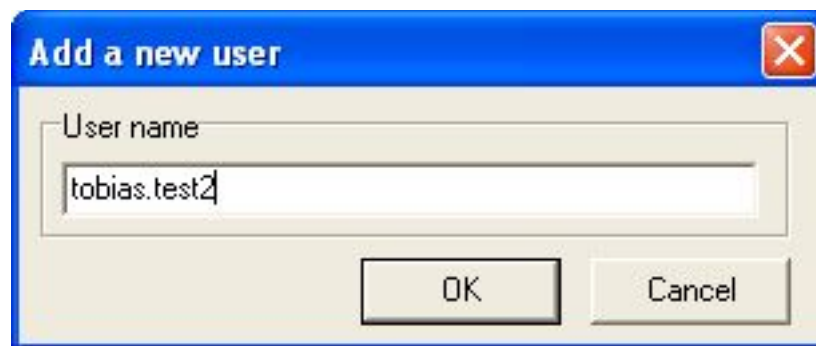
You are now able to share your folders with any other Kolab users (accounts) on your Kolab server.

## Example - Sharing a folder

Right click on the Calendar folder of your mapped account to display its context menu and choose the 'Properties' option to display the 'Calendar Properties' dialog , select the 'Toltec Synchronization' tab as shown below:



This page lets you configure the set up for the Calendar IMAP folder as well as the 'Folder Sharing Options'. Choose 'Folder Sharing Options' and click on the 'Add' button.

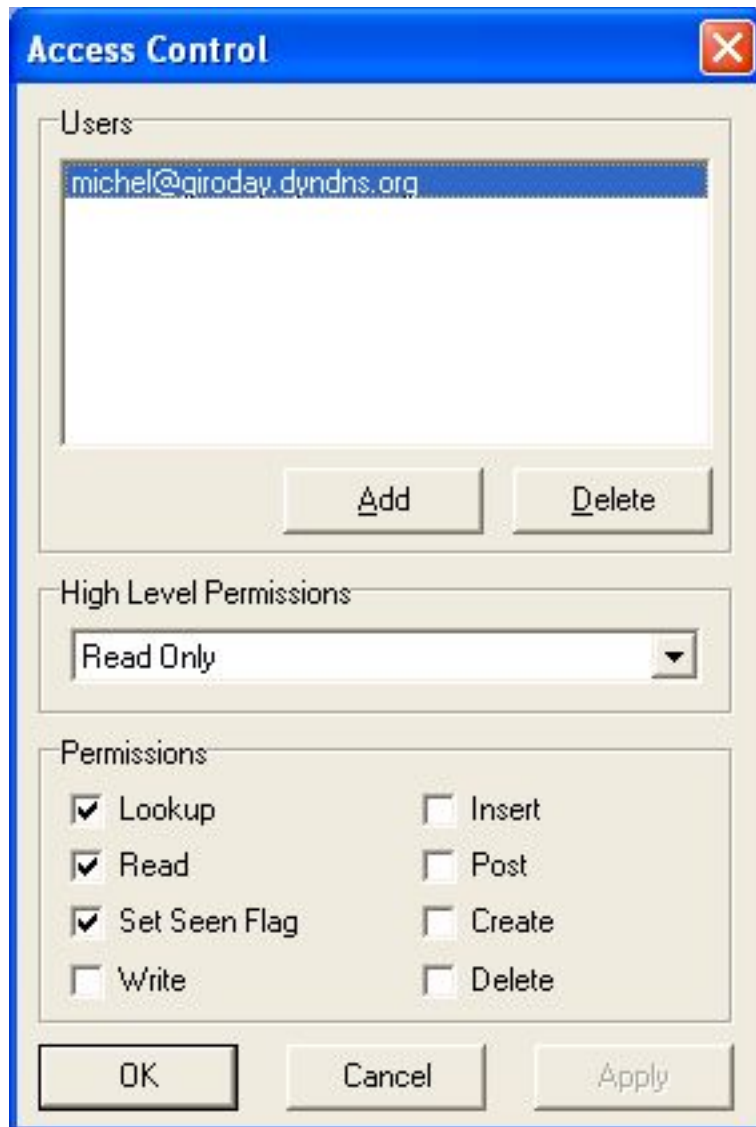


N.B : In the view above I adding to the 'Access Control' list of my Calendar folder a user which UID is :[tobias.test2@beeblebrox.homedns.org](mailto:tobias.test2@beeblebrox.homedns.org)

Click OK to confirm and check the 'Permissions' option you wish to allow to



this user. The example below shows “Read permissions”  
Choose preferably an option from the combo box intituled “High Level Permissions” to make sure your settings are correct.



**Note:** The “*User Name*” is the UID of your user account on the Kolab server. By default this *Unique Identity* is your *Primary Email Address*, but could be different, both should work (check your user account on the Kolab server if you are not sure about you UID).

The users listed in the ‘*Access Control*’ list of your folder will be able to access your calendar folder. Your calendar folder will be listed into their folder tree and updated each time they synchronize their clients to the Kolab server.

### **3. Kolab further information**

You may need some more detailed information about the Kolab Project. Here are a few links that may help you what find general and technical information.

#### **a. Useful links**

- Kolab Project ([www.kolab.org](http://www.kolab.org))

#### **b. The people behind the project**

Erfrakon, Intevation GmbH and Klarälvdalens Datakonsult AB have been contracted , to write this Free Software groupware server and client.

To learn more about those companies, just follow the links below:

- Klarälvdalens Datakonsult AB.
- Intevation GmbH.
- Erfrakon.