Toltec™ Connector
User Manual

Document Version 2.0

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This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (http://www.openssl.org/)

This product includes cryptographic software written by Eric Young (eay@cryptsoft.com).

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Table of Contents

1.Welcome

Welcome to the world of the Toltec™ Connector. We trust that you will enjoy the simplicity of the product while achieving great results. The manual will assist to configure the Toltec™ Connector.

2.Manual Conventions (2003)

To utilize this manual for Microsoft Outlook 2003 Message Store and Folder Options, you need to switch to the Folder List View, in the bottom left corner of the navigation pane in Microsoft Outlook 2003, as shown below:

The manual conventions explained below will assist you while working trough the Toltec™ Connector manual.

i) **Notes:-**

This icon will indicate valuable notes which should be taken into account.

ii) **Tips:-**

Tips will guide you through the easy to remember pointers.

iii) **Troubleshooting:-**

This icon will indicate areas where difficulty could arise and where you should refer to the Troubleshooting Section at the end of the Toltec™ Connector Manual.

iv) **Warning:-**

Attend to these points with great care, otherwise vast amounts of time will be spent in the Troubleshooting Section.

v) **Kolab:-**

This refers to Kolab Server specific sections.

3. Requirements

3.1 System Requirements

The system requirements for the Toltec™ Connector are as follows:-

- Microsoft Windows 98SE/NT4SP6/ME/2000/XP
- Microsoft Outlook 2000/XP/2003

3.2 IMAP4 Server Requirements

The IMAP4 server must support the following commands and extensions:-

NAMESPACE (different names for the inbox mailboxes and shared mailboxes), ACL, UIDPLUS, STARTTSL, AUTH=PLAIN, AUTH=CRAM-MD5, ANNOTATEMORE.

No quotas should be set on IMAP4 accounts used by the Toltec Connector.

For a groupware solution we used the KOLAB server project for testing. This server incorporates the Cyrus-IMAP server. For more details goto www.kolab.org.

To use Cyrus-IMAP4 on it own you need to do the following:

- User versions 2.2.x or newer. Older versions (2.1.x) will not work.

- Apply ANNOTATEMORE patch to the Cyrus-IMAP4 source that allows for support of custom vendor annotation. The patch can be obtained from our web site www.toltec.co.za.

- Compile Cyrus-IMAP with Cyrus SASL with support for PLAIN and/or CRAM-MD5 authentication.

- Disable altnamespace in the imapd.conf.

4. Setting up the Toltec™ Connector

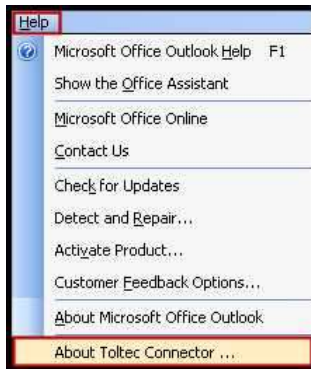## 4.1 Activate the Licensing of the Toltec™ Connector

Illustration 1

After installing the software package you need to active the license key.

Path: Outlook | Help | About Toltec Connector ...

To activate the licensing of the Toltec™ Connector, start up Microsoft Outlook click on the "Help" button on the toolbar. Scroll down and select the "About Toltec Connector" option (Illustration 1).

You will now see that the Registration Information is blank. The product has not been registered as yet (Illustration 2).

Click on the "Load a License Key" button to load.
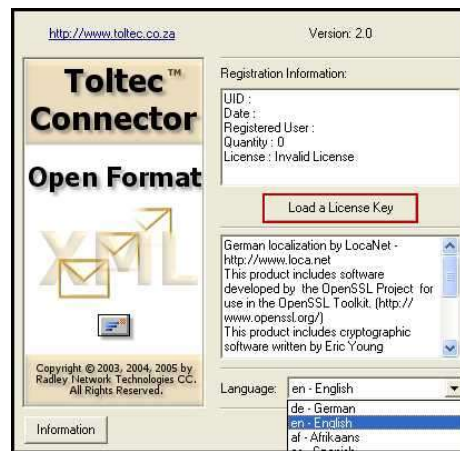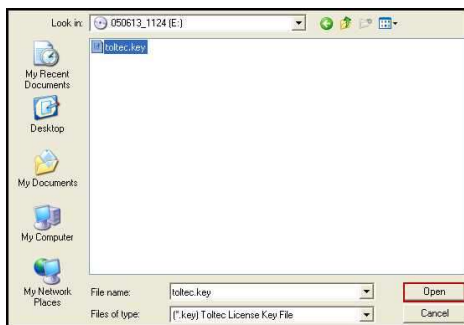

Illustration 2

Illustration 3

The "key" that is required for the loading of the licensing will be e-mailed to the registered user. The key must be save to disk.

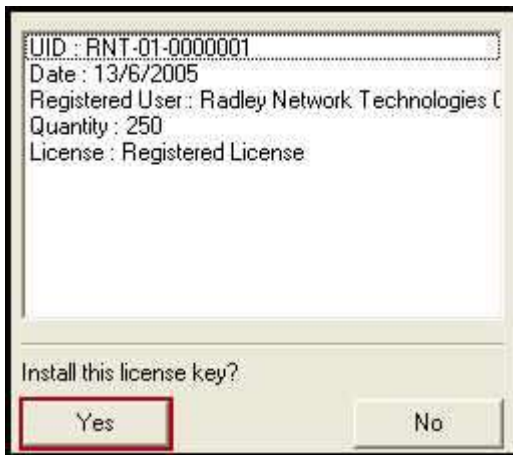Browse to where the key is saved and click on the "Open" button to continue (Illustration 3).

Illustration 4

In the Toltec Connector License Key Window you will be able to view your unique License Key details (Illustration 4).

Click on the "Yes" button to install this license key.

Illustration 5

You will now be able to view the Registered information and choose your preferred language. Click on the "OK" to finish (Illustration 5).

TIPS:

When installing the Toltec™ Connector on a number of client machines, it would be advisable to use a removable disk, as this would be easier.

4.2 Mapping a Message Store to an IMAP4 Mail Account

Path: Outlook | Tools | Options

In order to map a Message Store to an IMAP4 mail account, you need to open Microsoft Outlook, and click on the Tools button on the Outlook Menu bar. Scroll down to the Options menu item and select (Illustration 6).
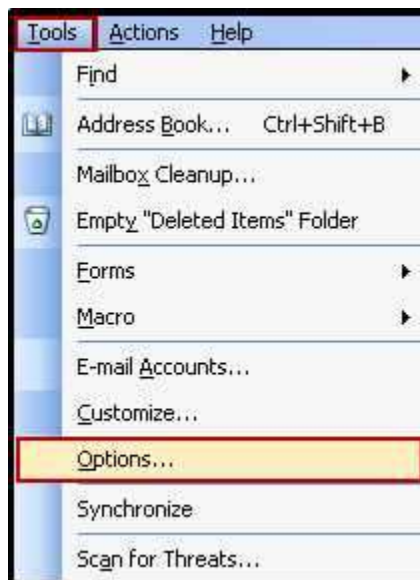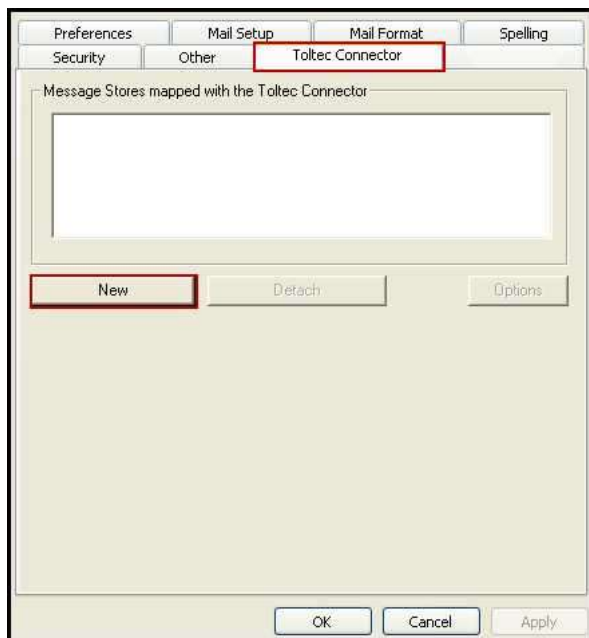
Illustration 6

Next, click on the Toltec™ Connector Tab.

Click on the "New" button to activate the Mapping Wizard, which enables you to map a message store to an IMAP4 mail box (Illustration 7).
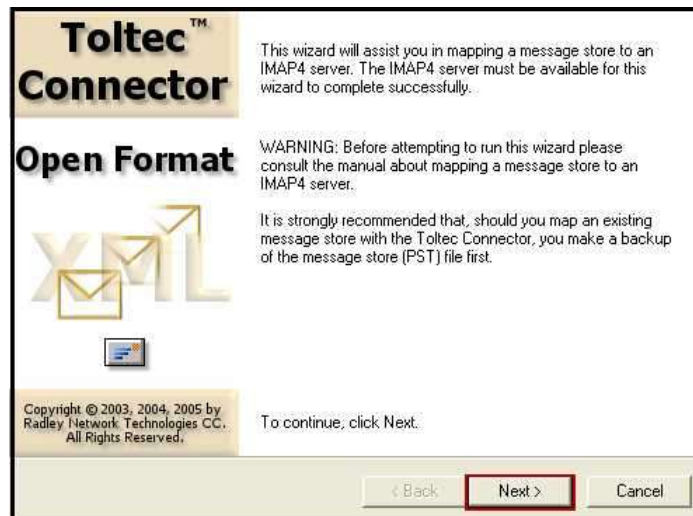
Illustration 7

This Wizard will help you step by step to set up the mapping of a message store to an IMAP4 mail account. Upon entering the Wizard, press the "Next" button to continue (Illustration 8).

WARNING:

It is advisable that before mapping an existing private message store, make a BACKUP of the message store!

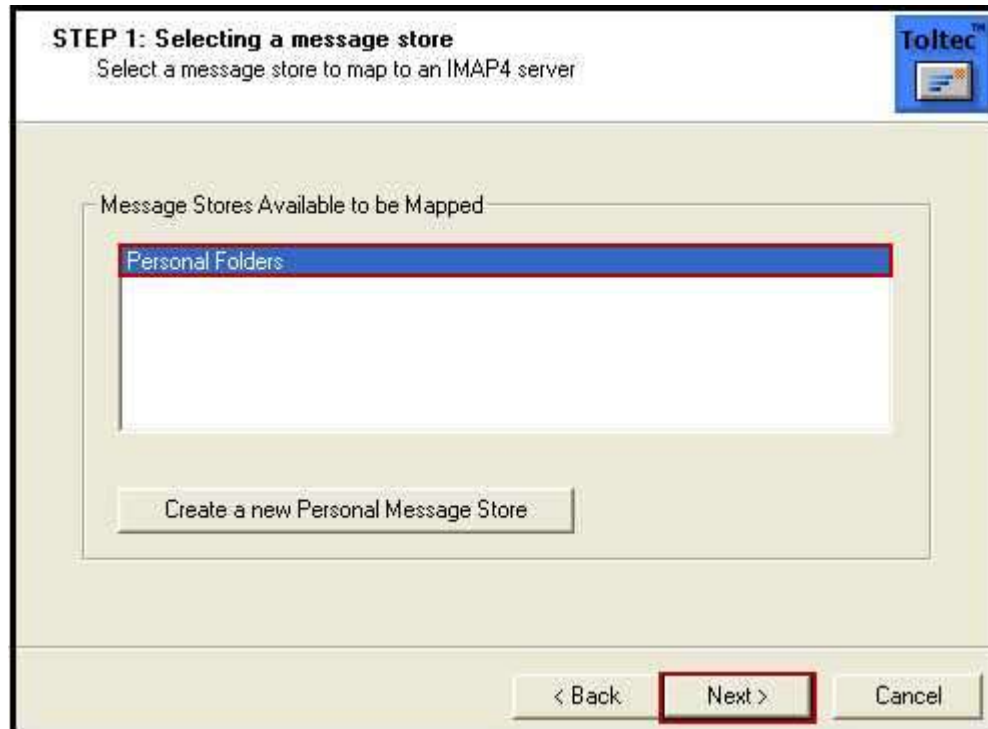*Illustration 8*

Step 1 : Selecting a message store

Illustration 9

This step will enable you to select a personal message store to be mapped to an IMAP4 server.

The message stores available to be mapped will be listed and a choice can be made. Should the message stores listed be insufficient, a new message store can be created. To create a new message store, click on the button "Create a new personal message store" (Illustration 9).

TIPS:

The list of personal folders which are available to be mapped. It is not necessary to create a new message store if one in the list can be selected.
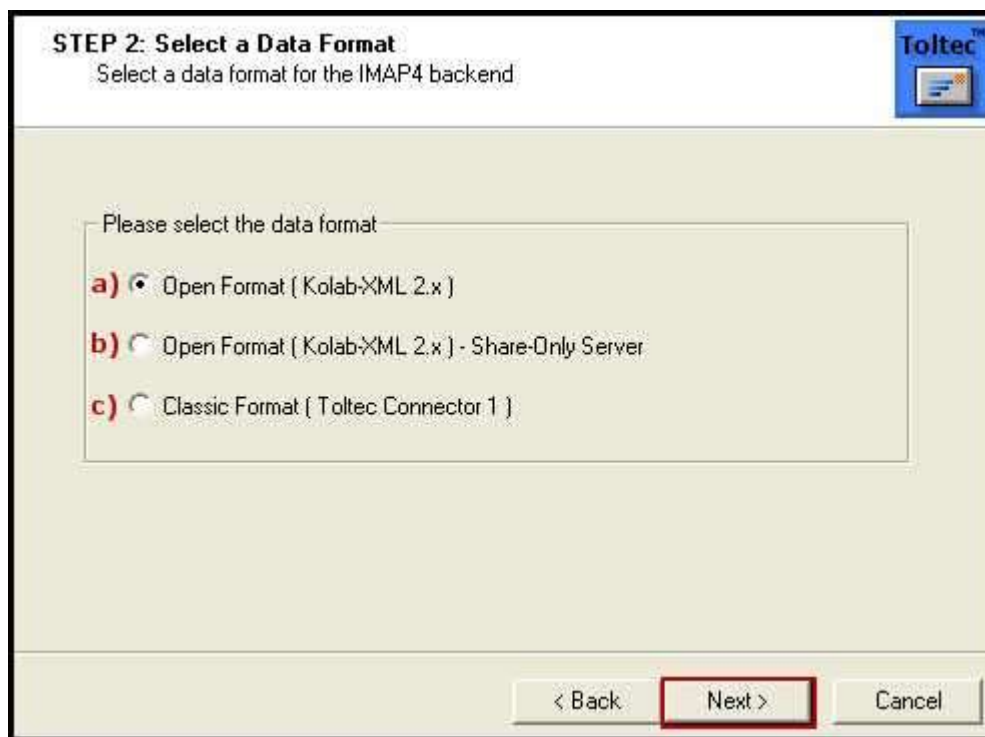
Step 2 : Select a Data Format

Illustration 10

a) Open Format (Kolab-XML 2.x)

    This is the new format used that allows interoperability with other Kolab-XML clients, for example, KDE Kotact and the Horde Web Client.

b) Open Format (Kolab-XML 2.x) – Share-Only Server

    This is used when mapping to a non-home Kolab Server where you have more than one Kolab Server setup.

c) Classic Format (Toltec Connector 1)

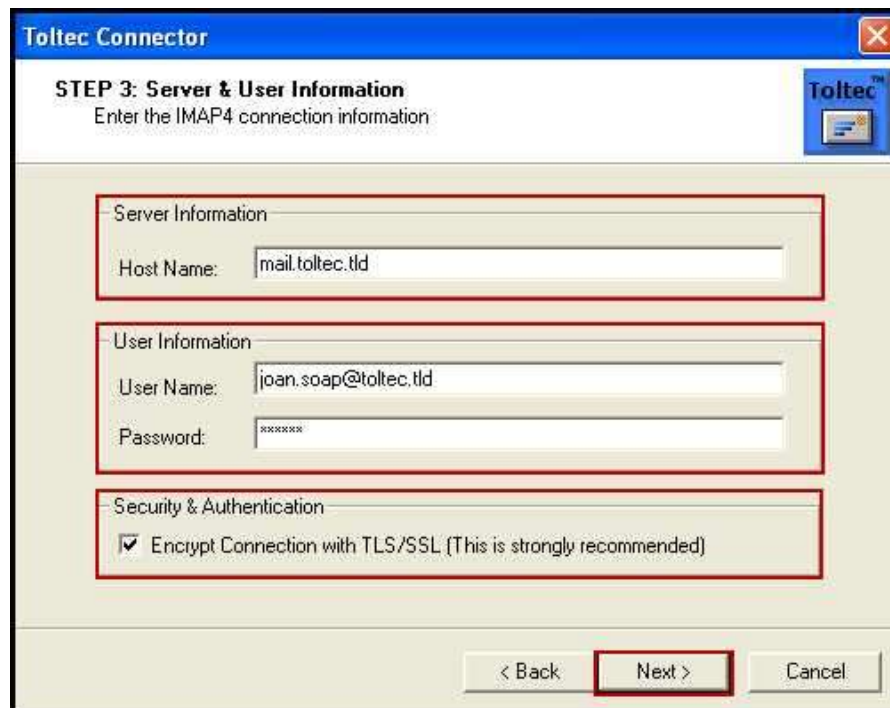   This format can be used when sharing of information is done between Toltec Connectors only.

NOTES:-
Only use the Kolab-XML format or the Classic Format. Mixing the two formats on the same account can have unpredictable results.

Step 3 : Server and User Information

Illustration 11

This step will enable you to enter the IMAP4 connection information.

Enter the host name / IP Addresses of the server or a fully qualified domain name. For our **example**, we will be using "**mail.toltec.tld**" as our host name. You can also use the IP Address of the server, "**joan.soap@toltec.tld"** as our user name. Click on the "Next" button to continue (Illustration 11).

The following points should be taken into consideration (Illustration 14):-

i)   Server Information: The IP Address used should be a fully qualified
        domain name.

K◯LAB   *On Kolab this is usually the full e-mail address.*

ii)   User name and Password: This must is the user name and password that
        will authenticate the user on the IMAP4 server.

K◯LAB   *For use with Kolab Servers this must be checked.*

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iii)   By activating this, all communication between the connector and the server will be encrypted. Some IMAP servers need this before it will expose some authentication mechanisms.
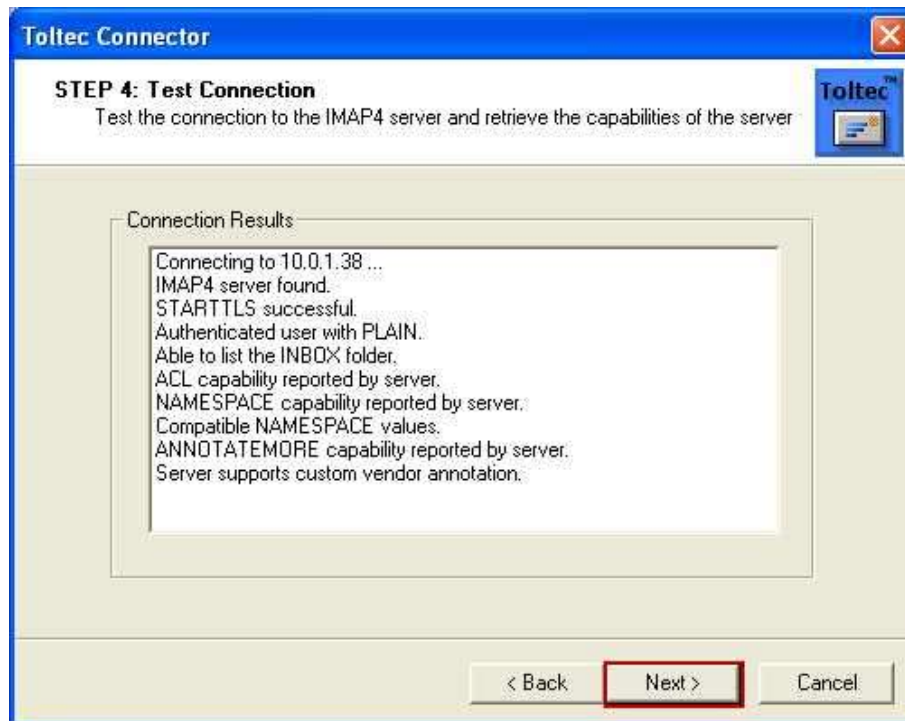
Step 4 : Test Connection

Illustration 12

This step will test the connection to the IMAP4 server and confirm the user credentials provided. To continue, click on the "Next" button. The Wizard will confirm that the mapping had been successful (Illustration 12). Click on the "Finish" button to complete.
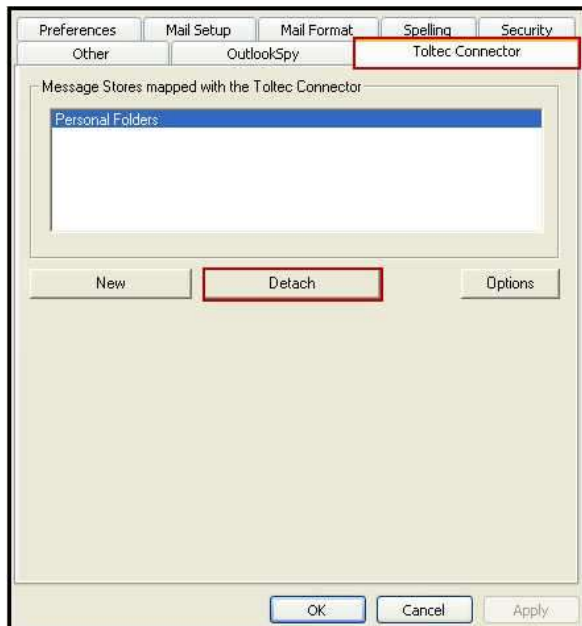
4.3 Detach a Message Store

Illustration 13

In order to detach a message store, follow the path as indicated below:-

Path: *Outlook | Tools | Options | Toltec Connector*

Click on the "Detach" button to detach a message store.

NOTES:

Note that the message store will only be detached and not deleted. The message store can be reselected, therefore remapped at any time.

WARNING:

If you remove this mapping you will need to either remove the PST file or delete/recreate the account on the IMAP4 server before mapping again, else all the entries will be duplicated.

NOTES:

When detaching a message store, all shared folders will be removed from the PST file.
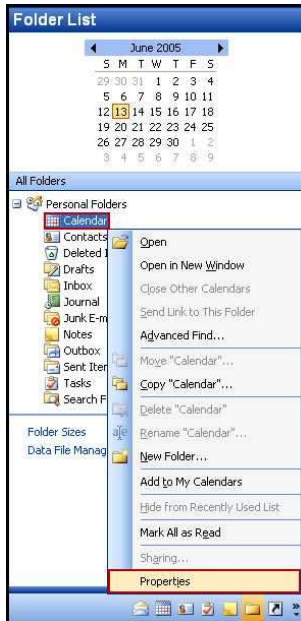
5. Configuration of Folders

Illustration 14

5.1 Setting Synchronization Options

Select Microsoft Outlook. Click on the Calendar folder (the example that we will be using, as any of the Outlook folders can be synchronized).

Right click on the Calendar Folder and a menu will appear. Select the "Properties" menu item (Illustration 14).

Click on the "Toltec" tab. Tick the "Synchronize this Folder box", (no.1 as per the following screen shot) as no synchronization will take place if this option is not selected.
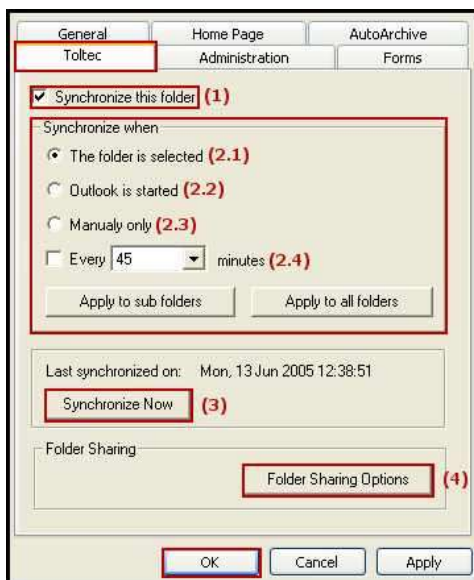

Illustration 15

The **"Synchronize when"** gives you the following options:-

2.1) "The folder is selected"
The synchronization will take place when the chosen folder has been selected.

2.2) "Outlook is started'
The synchronization will automatically take place when Outlook is started.

2.3) "Manually only"
The synchronization will only take place when applied manually, as follows:-
(continues on the next page)

2.4) "Every ... minutes" :-

The synchronization will automatically take place every chosen amount of minutes. This option needs to be specified by the user.

3)   "Synchronize Now" :-

Refer to 2.3 ("Manually Only" no. 2.3.1).

4)   "Folder Sharing Options" :-

Please refer to the next section of the Toltec™ Connector Manual, *"6.2 Sharing Folders".*

After the required choice has been made, click on the "Apply" button and then on the "OK" button.

NOTES:

Note that should the "Synchronize this folder" box be unselected (switched off), no synchronization will take place.

5.2 Sharing Folders

Path: *Outlook | Folder (erg. Calendar) | Properties*

Select Microsoft Outlook.   Click on the Calendar folder (the example that we will be using, as any of the Outlook folders can be synchronized) (Illustration 16).

Right click on the Calendar Folder and a menu will appear. Select the "Properties" menu item.

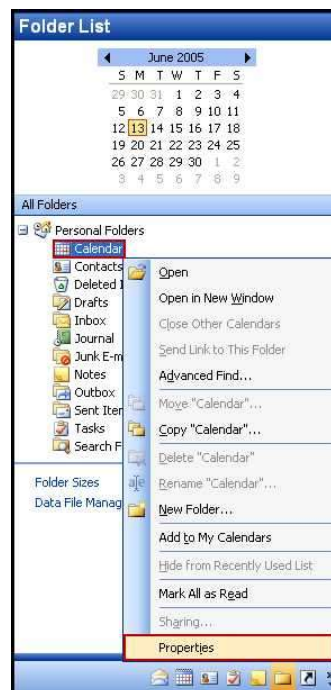A new window will open up. Click on the "Toltec" tab.
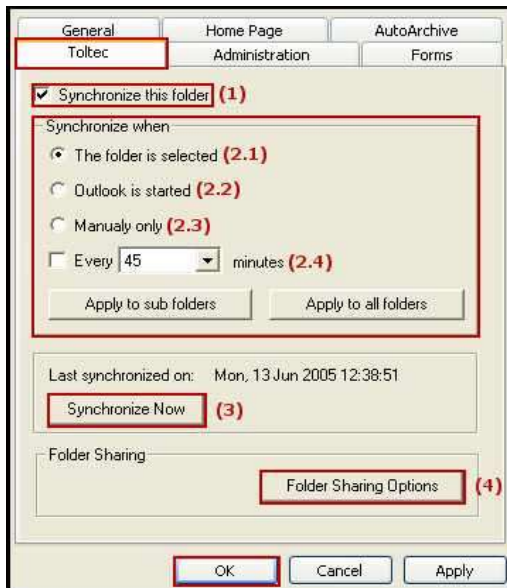

Illustration 16

Illustration 17

Click on the "Folder Sharing Options" button (no.4).

A new window will be displayed on your screen (Illustration 17).

Illustration 18

In order to share folders with another user, a user must be added. Click on the "Add" button to continue (Illustration 18).
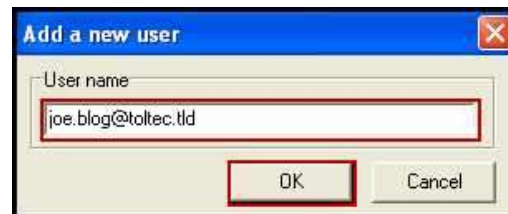

Illustration 19

The example will be named "joe.blog@toltec.tld".

After entering the user name, click on the "OK" button (Illustration 19).

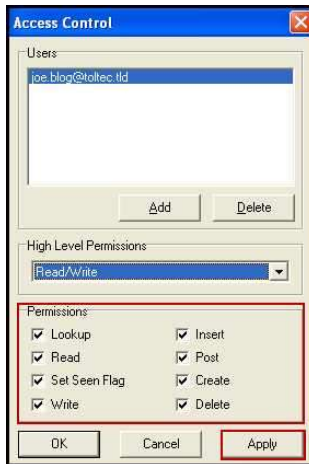**KOLAB**   With Kolab Servers you usually need to use the full e-mail address.

Illustration 20

Select (tick) all the permissions that is allowed for the specified user and click the "Apply" button (Illustration 20).

Upon selecting a user, all the permissions dedicated to the user can be viewed and modified.

High Level Permissions:-

None:-

The selected user has no access to the folder and will be removed when you click on the apply button.

Read Only:-

The selected user has Read Only access to the folder and cannot modify any of the items in that folder.

Read / Write:-

The selected user has both Read and Write access to the folder and can see all the items, modify and delete them.

Custom:-

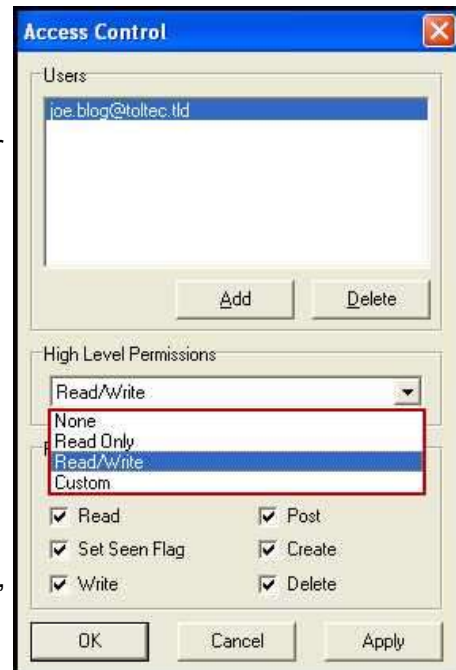The administrator can set selected IMAP ACL options for the folder. This should only be done by advanced users.
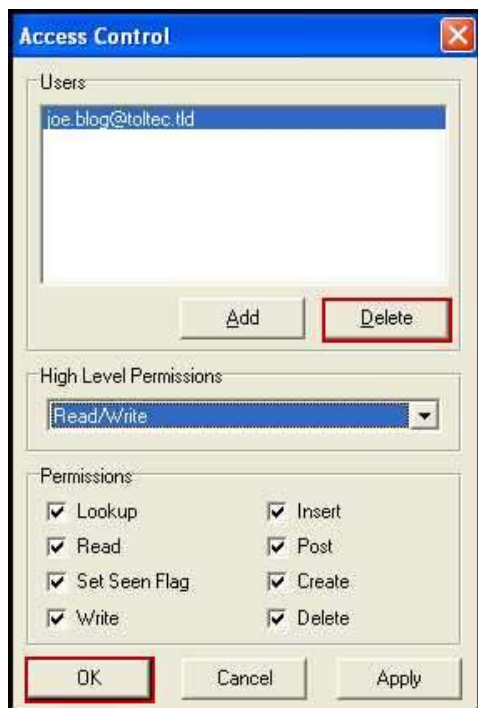

Illustration 21

Illustration 22

Should you wish to delete a shared access of a user, follow this path and click on the "Delete" button:-

Path: *Outlook | Folder (e.g. Calendar) | Properties | Toltec | Folder Sharing Options*

The user will now be removed from the shared list. (Illustration 22).

6.Synchronization of Folders Manually

Path: *Outlook | Folder (e.g. Calendar) | Properties*

The manual synchronization of folders can be achieved as follows:-

1. Select the "Synchronize Now" button in the Folder's Properties OR
2. Click the synchronization button on the Outlook Toolbar, as indicated below (Illustration 23):-

Illustration 23

7.Notes on configuring MS Outlook
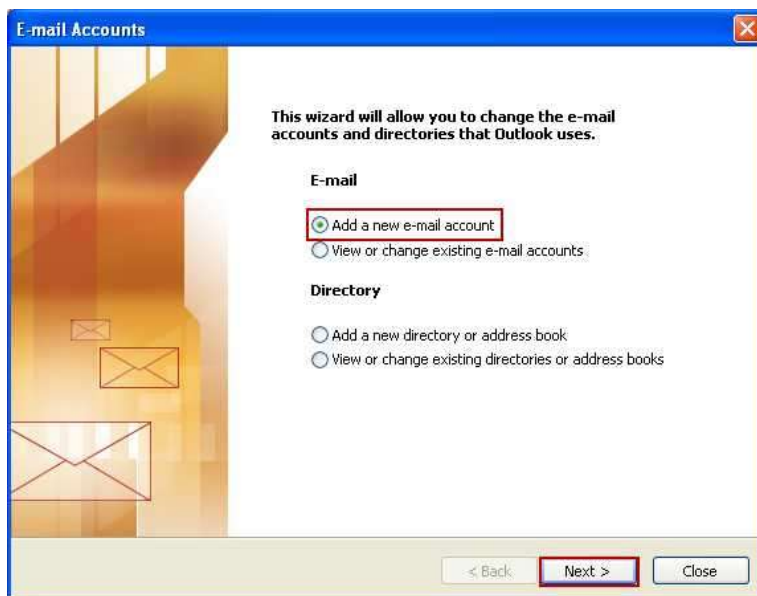
7.1 Internet E-mail Account

> **NOTES:-**
>
> When creating an Internet E-mail account to send and receive mail, only use the POP3 and POP3S protocols to retrieve mail. DO NOT use IMAP4 or IMAP4S.

To add an internet e-mail account, you need to use the Wizard provided by Microsoft Outlook. To start the Wizard, select the menu "Tools" and select "E-mail Accounts".

Step 1: Select "Add a new e-mail account"

Illustration 24

Click on the "Add a new e-mail account" button.

Click on next to continue.

Step 2: Select "POP3" Server Type

Click on the "POP3" button.

Click on the "Next" button to continue.
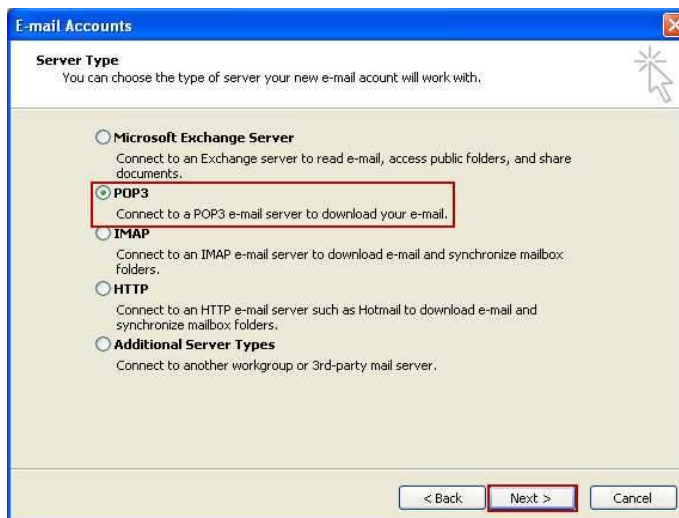
Illustration 25

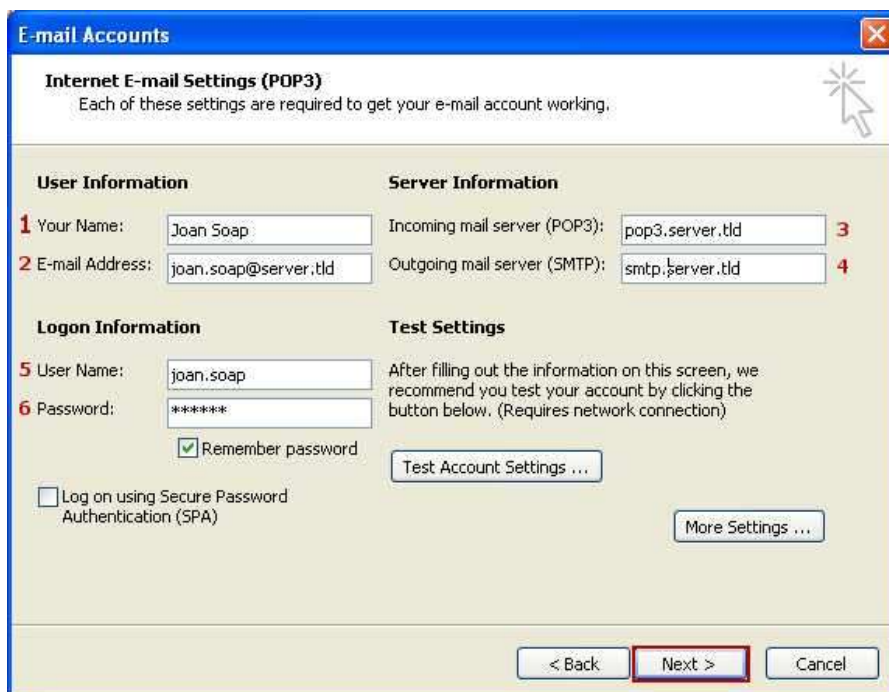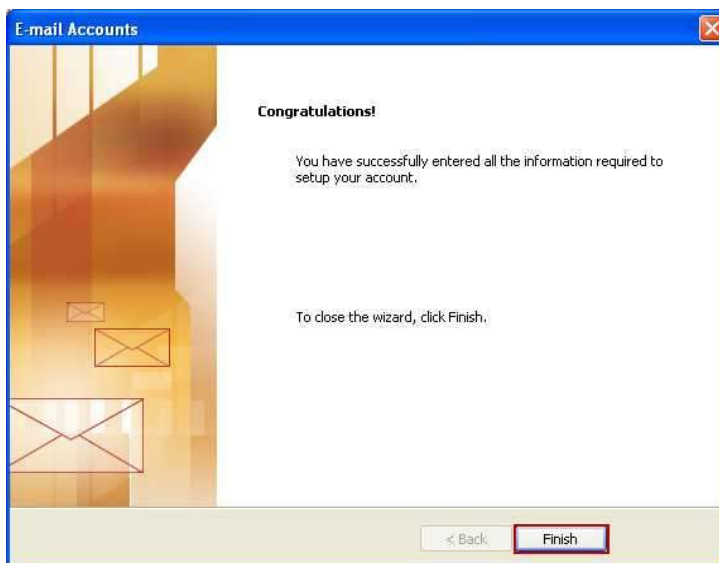### Step 3: Entering User and Server Information

Illustration 26

1 & 2)   Your display name and e-mail address.

3 & 4)   Incoming and outgoing mail server host names of IP addresses.

5 & 6)   User name and password of the POP3 account.

Note: You can obtain the information for 3,4,5 and 6 from your system administrator or your Internet Service Provider.

Click on the "Next" button to continue.

Click on the "Finish" button to complete the setup of the Internet E-mail Account.

Illustration 27

7.2 iCalendar Setup

After setting up at least one Internet E-mail Account you need to configure Microsoft Outlook to send invitations in iCalendar format.

To access the Calendar Options you need to select the menu "Tools", and then select "Options". In the "Preference" tab, select "Calendar Options..."
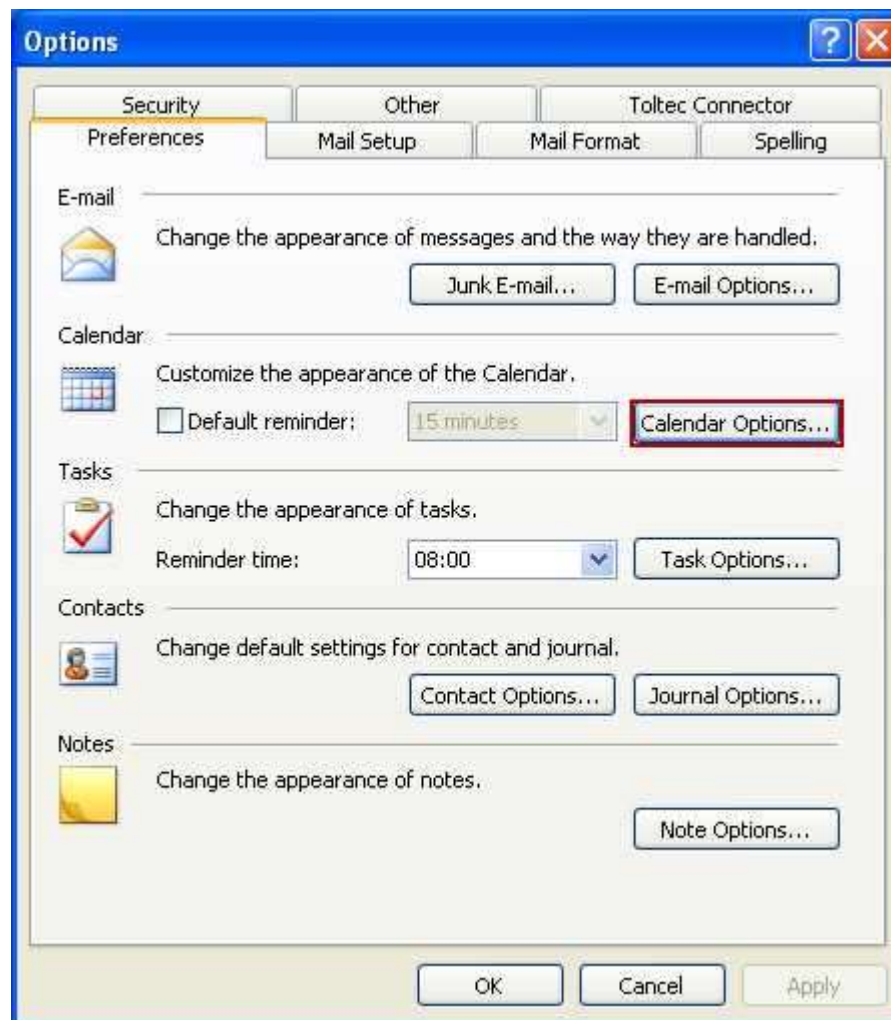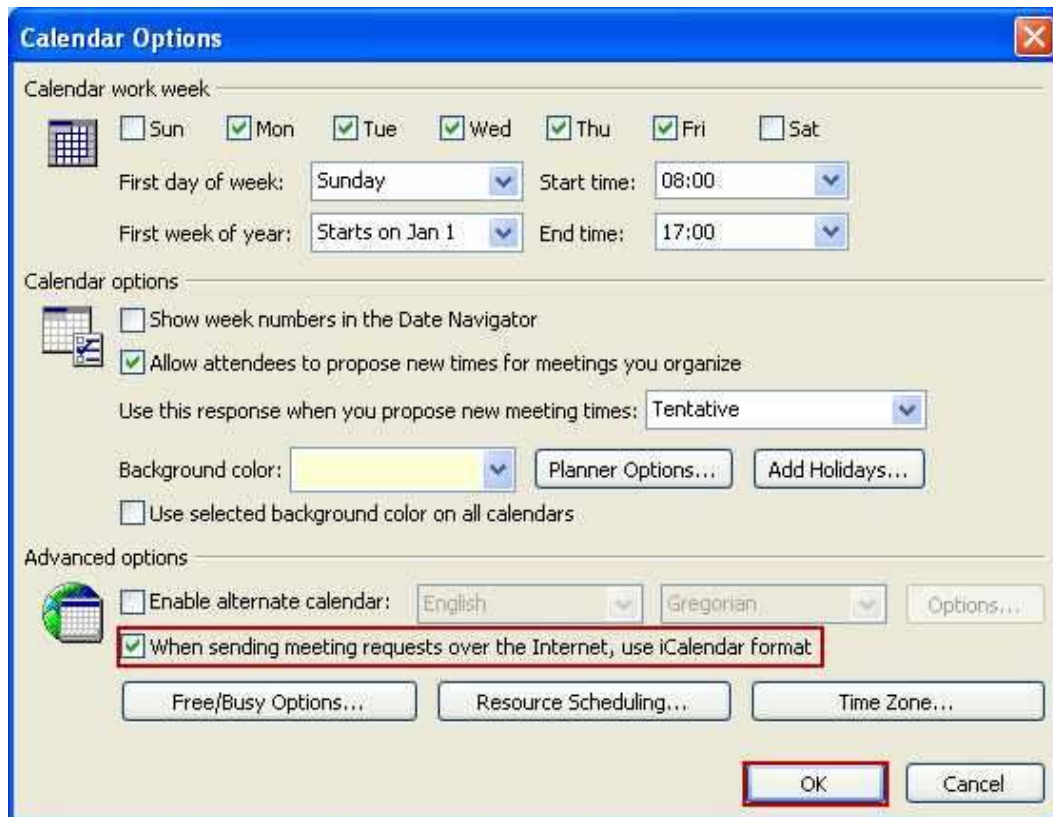

Illustration 28

Illustration 29

Ensure that the "*When sending meeting requests over the Internet, use iCalendar format*" is selected. Click on the OK button when done.

8.Toltec™ Message Store Options

Illustration 30

Click on the top folder of the message store.

Right click on the folder and a menu will appear. Select the "*Properties*" menu item (Illustration 30).

Click on the "*Toltec Message Store Options*" tab.

1) Select this to enable synchronization of the message store.

2) The server, user information and option of the IMAP4 account.

3) This button will test the settings of 2. Use this to diagnose connection problems to the IMAP4 server.

4) Clicking on the "*Synchronize All the Folders*" button will force the synchronization of all the folders to the IMAP4 server.

5) If this option is selected all the folders will be synchronized every time Outlook is started.

6) This field will indicated the format the connector is using to store the Outlook information on the IMAP4 server.
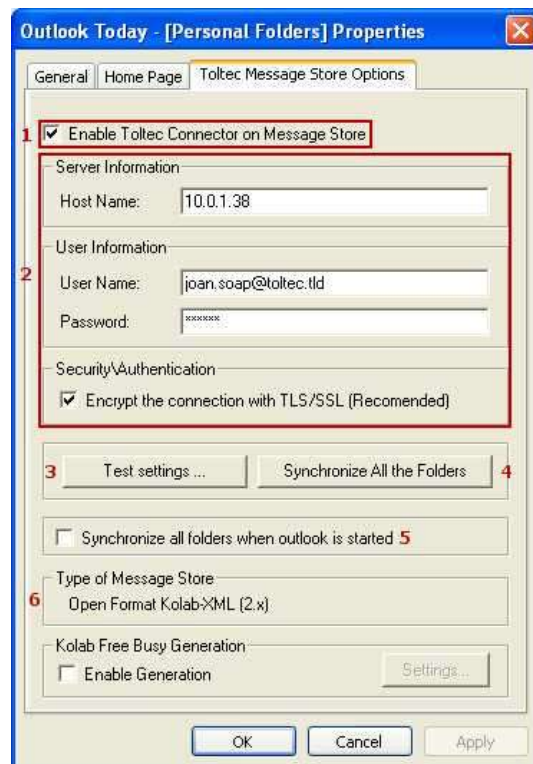

Illustration 31

9. Notes on Configuring Toltec™ Connector with the Kolab Server

9.1 Mapping a Message Store and Sharing Folders

When mapping a message store or sharing folders on a Kolab server you need to use the correct UID as the user name. The default UID used by the Kolab server is the e-mail address of the user.

In some cases the administrator can elect to use and alternative UID. If so you need to obtain the UID from the Administrator.

9.2 Internet E-mail Account

The default configuration of the Kolab server requires the use of POP3S and SMTPS for the Internet E-mail Account. This configuration can be changed in the "Services" page of the Kolab web administration interface.

Should you elect to stay with the default configuration you need to configure the Internet E-mail Account as follows. To start the Wizard, select the menu "Tools" and select "E-mail Accounts"

Step 1: Select "Add a new e-mail account"
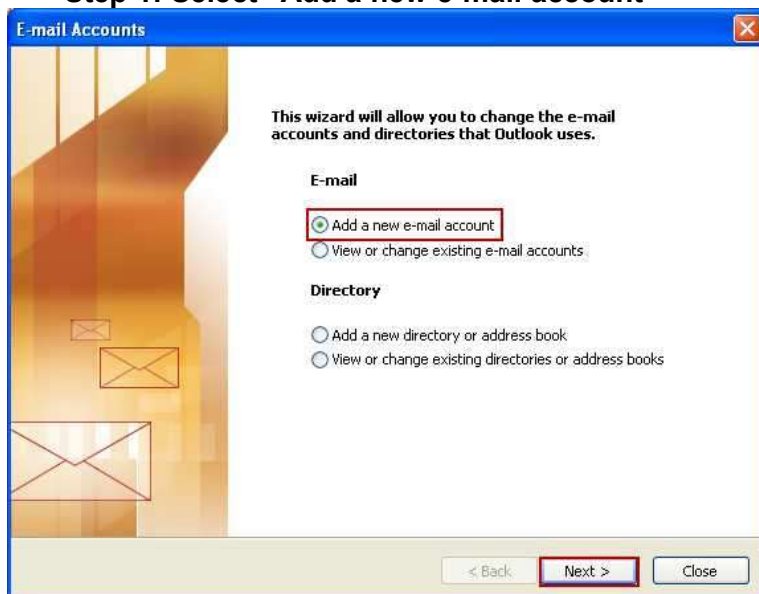
Click on the "Add a new e-mail account" button.

Click on next to continue.

Illustration 32

Step 2: Select "POP3" Server Type

Illustration 33

Click on the "POP3" button.

Click on the "Next" button to continue.

Step 3: Entering User and Server Information
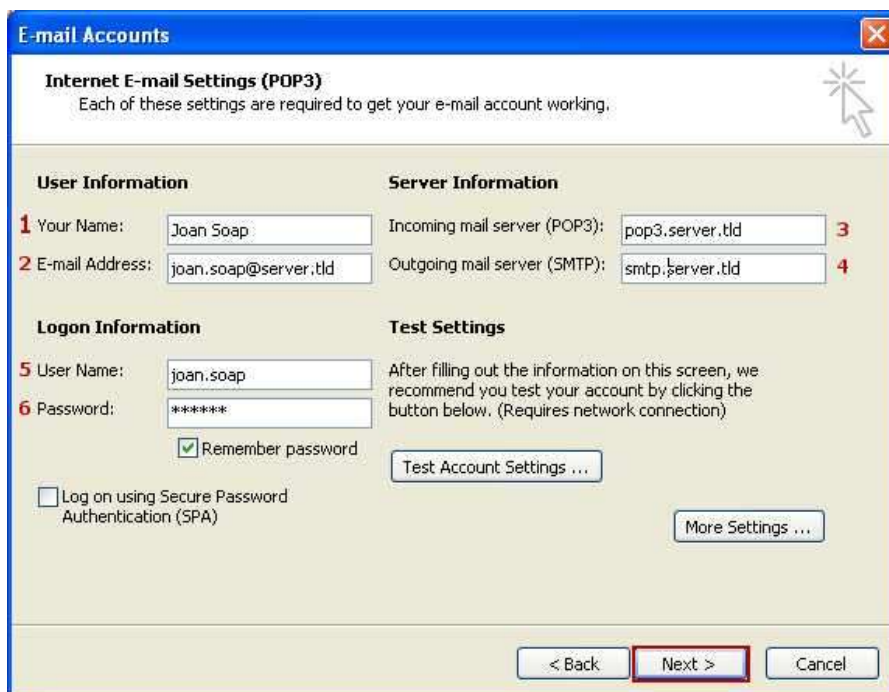
Illustration 34

1 & 2)   Your display name and e-mail address.

3 & 4)   Incoming and outgoing mail server host names of IP
              addresses.

5 & 6)   User name and password of the POP3 account.

Note: You can obtain the information for 3,4,5 and 6 from your system
administrator or your Internet Service Provider.

Step 4: Configure security and authentication settings

Click on the "More Settings ..." button.

Illustration 35

On the "*Outgoing Server*" tab
you need to enable to "*My
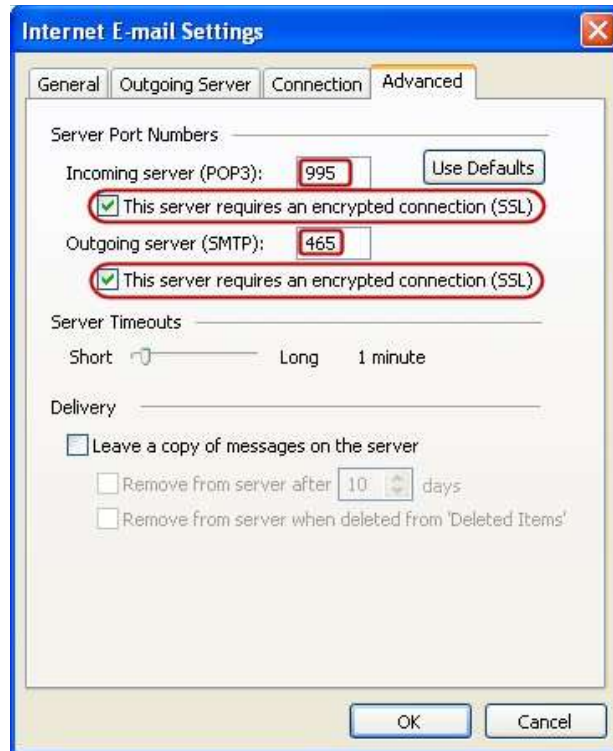outgoing server (SMTP)
requires authentication*".

Once this is done select "*Use
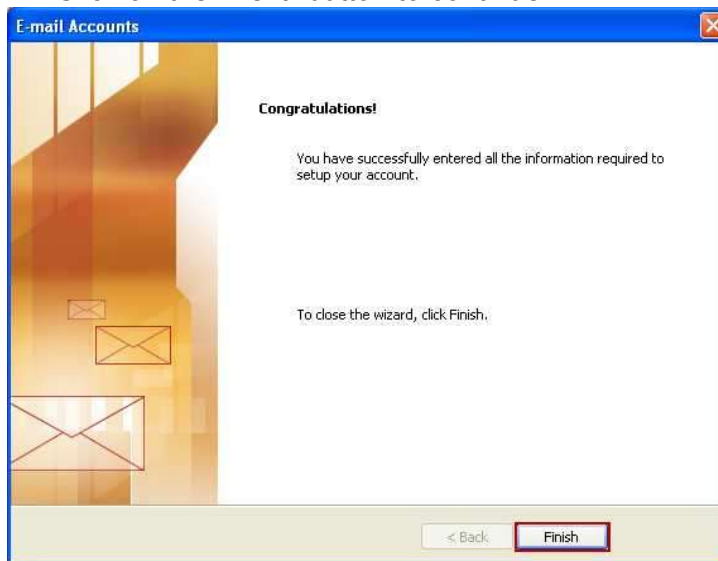same settings as my incoming
mail server*"

On the "*Advanced*" tab select "*This server requires an encrypted connection(SSL)*" for both servers.

Set the POP3 server port to 995 and the SMTP port to 465.

Click on the OK Button.

Click on the "Next" button to continue.

Click on the "Finish" button to complete the setup of the Internet E-mail Account.

Illustration 36