Toltec™ Connector User Manual

Document Version 2.0

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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.



Notes:-

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



Tips:-

Tips will guide you through the easy to remember pointers.



Troubleshooting:-

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



Warning:-

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



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 <u>www.kolab.org</u>.

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 <u>www.toltec.co.za</u>.
- 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

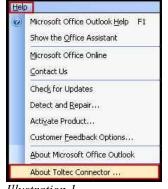


Illustration 1

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.

http://www.toltec.co.za		Version: 2.0	
Toltec™	Registration	Information:	
Connector	UID : Date : Registered Quantity : C		
Open Format		Load a License Key	
XAL	http://www This produc developed use in the 0 www.open	ct includes software by the OpenSSL Project for OpenSSL Toolkit. (http:// ssl.org/)	•
		ct includes cryptographic itten by Eric Young	~
Copyright © 2003, 2004, 2005 by Radley Network Technologies CC. All Rights Reserved.	Language:	en - English	•
Information		de - German en - English af - Afrikaans	

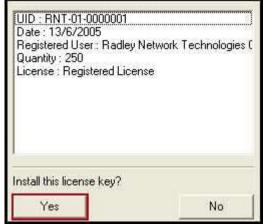
Illustration 2



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).



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 4

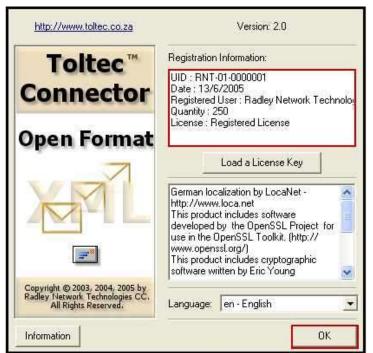


Illustration 5

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



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).

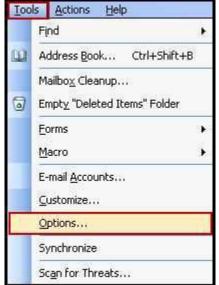


Illustration 6

tessage Stores mapped with the Toltec Connector	Preferences	Mail Setup	Mail Format	Spelling
New Detach Option	Security	Other	Toltec Connector	
	lessage Stores r	napped with the Tolt	ec Connector	
	Soll.			
	New	D	etach	Options

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!

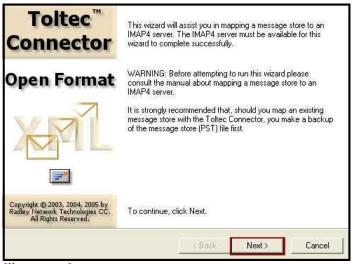
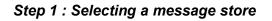


Illustration 8



Select a message store to map to	ore an IMAP4 server	Tolt
– Message Stores Available to be M	apped	
Personal Folders		
Create a new Personal Mes	ssage Store	
Create a new Personal Me	ssage 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

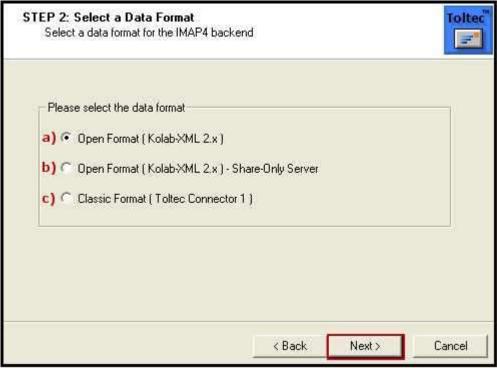


Illustration 10

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.

keelee 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

Server Informat	100
Host Name:	mail.toltec.tld
User Informatio	n
User Name:	joan.soap@toltec.tld
Password:	XXXXXX
	RXXXXX

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.
- **KOMP** 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.

KOLAB For use with Kolab Servers this must be checked.

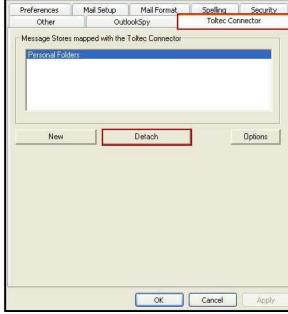
iii) By activating this, all communication between the connector and the server will be encrypted. Some IMAP servers need this before it will expose some authentication mechanisms.

Step 4 : Test Connection

STE	Connector P 4: Test Connection Fest the connection Fest the connection to the IMAP4 server and retrieve the capabilities of the server	Toltec"
	Connection Results Connecting to 10.0.1.38 IMAP4 server found. STARTTLS successful. Authenticated user with PLAIN. Able to list the INBDX folder. ACL capability reported by server. NAMESPACE capability reported by server. Compatible NAMESPACE values. ANNOTATEMORE capability reported by server. Server supports custom vendor annotation.	
	< Back Next > 0	Cancel

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

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.

Illustration 13



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.

Toltec	Administration	Forms
 Synchronize th 	is folder (1)	
Synchronize whe	- 19410	
 The folder is 		
	the subscription of the	
C Outlook is st	arted (2.2)	
C Manualy only	(2.3)	
Every 45	 minutes (2.4) 	
	1	
Apply to su	b folders Appl	y to all folders
Last synchronize	d on: Mon, 13 Jun 2005	12:38:51
Synchronize 1	low (3)	
Folder Sharing		
	Folder 9	Sharing Options 🤅
	30	

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.



General	Home Page	AutoArchive
Toltec	Administration	Forms
Synchronize thi	s folder (1)	
Synchronize whe	10110	
• The folder is		
C Outlook is sta		
	No. of Concession, Name	
C Manualy only	1	
Every 45	minutes (2.4)	
Apply to sui	b folders App	ly to all folders
Last synchronize	d on: Mon. 13 Jun 2005	512:38:51
Synchronize N		
- Synchionizen	(3)	
Folder Sharing		
	Folder	Sharing Options
	1	

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

А	new	wind	low	will	be
dis	played	on	your	scr	een
(IIIt	ustratio	n 17)).		

Illustration 17

	Add Delete
High Level Permissions	
High Level Permissions	
1	7
Permissions	Insert
1	
Permissions	☐ Insert ☐ Post
Permissions Lookup Read	

Illustration 18

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

Add a new user		
User name		
joe.blog@toltec.tld		
	ОК	Cancel

Illustration 19

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

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



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



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.

Jsers joe.blog@toltec.tld		
	Add	<u>D</u> elete
ligh Level Permissio	ns	
Read/Write		
None Read Only		
Read Only Read/Write		
		**
Custom		
	Po:	st
🔽 Read	Por Cre	
Custom Custom		ate



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joe.blog@toltec.tld	
	Add <u>D</u> elete
High Level Permissions	
High Level Permissions Read/Write	
Read/Write	
Read/Write Permissions	▼ Insert ▼ Post
Read/Write Permissions I Lookup	

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

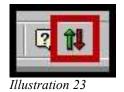
The user will now be removed from the shared list. (Illustration 22).

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):-



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".

E-mail Accounts	×	
	This wizard will allow you to change the e-mail accounts and directories that Outlook uses. E-mail Add a new e-mail account View or change existing e-mail accounts Directory	Click on the "Add a new e-mail account" button.
	Add a new directory or address book	
	 View or change existing directories or address books 	
		Click on next to continue.
	< Back Next > Close	

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

Illustration 24

Step 2: Select "POP3" Server Type

	E-mail Accounts	X
	Server Type You can choose the type of server your new e-mail acount will work with.	2 2 1 2
Click on the "POP3" button.	 Microsoft Exchange Server Connect to an Exchange server to read e-mail, access public folders, and share documents. POP3 	
Click on the "Next" button to continue.	Additional Server Types Connect to another workgroup or 3rd-party mail server.	
	< Back Next >	Cancel

Illustration 25

Step 3: Entering User and Server Information

	ail Settings (POP3) ase settings are required to (get your e-mail account working,		光
User Informal	ion	Server Information		
1 Your Name:	Joan Soap	Incoming mail server (POP3):	pop3.server.tld	3
2 E-mail Address:	joan.soap@server;tld	Outgoing mail server (SMTP):	smtp.\$erver.tld	4
Logon Inform	ation	Test Settings		
5 User Name:	joan.soap	After filling out the information		
6 Password:	****	recommend you test your acc button below. (Requires netw		
	Remember password	Test Account Settings		
Log on using Authenticatio	Secure Password in (SPA)	(ischedant Settings	More Settings .)

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- 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.

E-mail Accounts		×
	Congratulations! You have successfully entered all the information required to setup your account.	C to
	To close the wizard, click Finish.	
	< Back Finish	

Illustration 27

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

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..."

tions		?
Security	Other	Toltec Connector
Preferences	Mail Setup	Mail Format Spelling
	e the appearance of messages a Junk E-m	
	mize the appearance of the Caler fault reminder:	ndar.
Chan Remi	e the appearance of tasks. der time: 08:00	Task Options
<u>&</u>	e default settings for contact an	
Chan	e the appearance of notes.	Note Options
	ОК	Cancel Apply

Illustration 28

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Calendar	work week					
	Sun Mon	🗹 Tue	🕑 Wed	🗹 Thu	🗹 Fri	Sat
	First day of week:	Sunday	~	Start time:	08:00	~
	First week of year:	Starts on Jan	1 🗸	End time:	17:00	~
alendar	options					
<u></u>	Allow attendees Use this response will Background color:		se new m	eeting times: Planner Op	Tentative	
dvance						
dvance	d options	- //	nglish		Gregoria	an 🕑 Options
Advance	d options	calendar: E	Contraction of the second s	2	La se	

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.
- 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.

V	Enable Toltec	: Connector on	Message Stor	e	
F	Server Informati	ion			
L	Host Name:	10.0.1.38			
F	User Information	1			
L	User Name:	joan, soap@	otoltec.tld		
L	Password:	*****			1
3	Test sett	ings	Synchroniz	e All the Folders	4
T	🗂 Synchronize	e all folders whe	en outlook is st	arted <mark>5</mark>	
	Type of Messag Open Format	ge Store Kolab-XML (2.)	d		
5		Generation		Settings	1

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

9.1 Mapping a Message Store and Sharing Folders

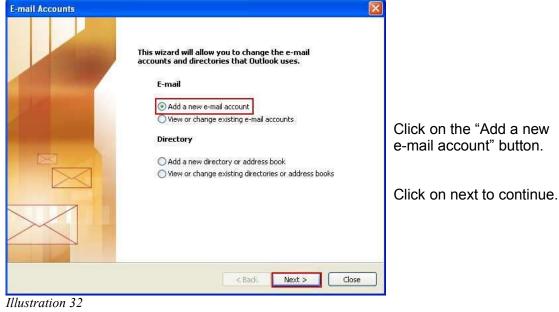
When mapping a message store or sharing folders on a Kolab server you need to use the correct UID as the user name. The default UID used by the Kolab server is the e-mail address of the user.

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"

Step 2: Select "POP3" Server Type

	E-mail Accounts	X
	Server Type You can choose the type of server your new e-mail acount will work with.	2.XX
	Microsoft Exchange Server Connect to an Exchange server to read e-mail, access public folders, and share documents. OP093 Connect to a POP3 e-mail server to download your e-mail.	
Click on the "POP3" button.	IMAP Connect to an IMAP e-mail server to download e-mail and synchronize mailbox folders. HTTP Connect to an HTTP e-mail server such as Hotmail to download e-mail and synchronize mailbox folders.	
Click on the "Next" button to continue.	Additional Server Types Connect to another workgroup or 3rd-party mail server.	
	< Back Next >	Cancel

Illustration 33

Step 3: Entering User and Server Information

	ail Settings (POP3) ese settings are required to (get your e-mail account working,		×
User Informat	ion	Server Information		
1 Your Name:	Joan Soap	Incoming mail server (POP3):	pop3.server.tld	3
2 E-mail Address:	joan.soap@server.tld	Outgoing mail server (SMTP):	smtp.server.tld	4
Logon Informa	ation	Test Settings		
5 User Name:	joan.soap	After filling out the information		
6 Password:	****	recommend you test your acc button below. (Requires netw	ount by clicking the ork connection)	
	Remember password	Test Account Settings		
Log on using Authenticatic	Secure Password n (SPA)	(ios Account Securgs III)	More Settings	
		< Back	Next > C	

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- 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.

	Les an I had so al
eral Outgoing Server	Connection Advanced
	MTP) requires authentication
	s my incoming mail server)
O Log on using	
User Name:	
Password:	
	Remember password
Log on using Sec	ure Password Authentication (SPA
Ulog on to incoming n	nail server before sending mail

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"

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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.

nternet	E-mail Settings			Ē
General	Outgoing Server	Connection	Advanced	
Incon Outgo Server	Port Numbers ing server (POP3): This server requin ing server (SMTP) This server requin Timeouts	res an encryp : [465] res an encryp	ted connectio	
Deliver	ave a copy of mes Remove from ser Remove from ser	sages on the ver after 10	server days	leted Items'
		C	ок	Cancel

Click on the "Next" button to continue.

	~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~	-
E-mail Accounts	Congratulations! You have successfully entered all the information required to setup your account. To close the wizard, click Finish.	Click on the "Finish" button to complete the setup of the Internet E-mail Account.
	< Back Finish	
Illustration 36		