# KC User Manual

*Release 7.2.1*

**Kopano BV**

**Oct 24, 2018**

Contents


**1 Introduction** **2**
1.1 Scope of this document . . . 2

**2 Separate WebApp manual** **3**

**3 Configuring Outlook** **4**
3.1 Generic Installation . . . 4
3.2 Installation of the Kopano OL Extension . . . 4

**4 Configuring Alternative Mail Clients** **6**
4.1 Client configuration . . . 6

**5 Configuring CalDAV Clients** **9**
5.1 Mac OS X iCal Client . . . 10
5.2 Sunbird Client Guide . . . 11
5.3 Evolution Client Configuration . . . 12

**6 Configuring Mobile Devices** **14**
6.1 Z-Push introduction . . . 14
6.2 Setting up a mobile device . . . 14

**7 Using Kopano Archiver** **27**
7.1 How can I access a stubbed message? . . . 27
7.2 How can I access a message that has been removed from my mailbox? . . . 27

**8 Legal Notice** **28**

This document, the Kopano Core (KC) User Manual, describes how to use and interact with KC as a user. It covers day-to-day usage as well as some more advanced features that are available with KC.

CHAPTER 1

# Introduction

Kopano Core (KC) is an open source software suite capable of providing a complete MAPI-based groupware stack with extensive interfacing capabilities. Its architecture is very modular, makes use of standards wherever possible, and integrates with common open source components.

Most components of Kopano Core are open source, licensed under the AGPLv3, and can be downloaded freely via Kopano's Download Page.

## 1.1 Scope of this document

This manual is intended for users of Kopano Core.

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

- Outlook integration by using Z-Push and adding Kopano OL Extension for extra functionality,
- connectivity with CalDAV and iCal enabled clients and
- syncing with mobile platforms like: BlackBerry, Android, Windows Phone and iOS based devices.

CHAPTER 2

# Separate WebApp manual

**Note:** Kopano WebApp has its own WebApp User Manual. This also has been done to be able to reference the User Manual directly from WebApp itself easily.

CHAPTER 3

# Configuring Outlook

## 3.1 Generic Installation

Kopano Groupware Core allows native interfacing with Microsoft Outlook 2013 and above via the ActiveSync protocol. With the optional Kopano OL Extension package, the available feature set is extended with collaborative features which do not exist in the ActiveSync transport implementation available in Microsoft Outlook. The Kopano OL Extension does not interfere at all with the native ActiveSync synchronization provided by Outlook and instead is a native COM plugin which provides extra functionality by extending the available feature set. Normal updates of Outlook distributed by Microsoft do not interfere with the functionality provided by the extension.

**Note:** It has to be said that while syncing via ActiveSync works ok for moderately sized mailboxes, the protocol was not made to be used with lots and lots of folders or multiple gigabyte of synced data. Having also a bit of control on the server side, we have implemented the possibility to open folders from shared accounts through Z-Push, while this generally works, problems can arise if working with multiple users in very busy folders. For future versions are are investigating possibilities to enforce certain maximum sizes for mailboxes and amounts of folders.

### 3.1.1 Limitations of KOE

Depending on the use case the Kopano OL Extension can greatly enhance the user experience of Outlook accounts that have been setup to use ActiveSync. Please be aware that it is by design not a replacement for the old Zarafa Mapi connector.

Although we have received reports of Outlook working stable on Inboxes with around 1000 folders and total sizes of up to 10GB, we strongly recommend against the use of ActiveSync for busy shared mailboxes or for mailboxes with large folder structures. For large mailboxes it is possible to enforce a shorter sync period on the server side. Z-Push 2.4 will also implement a webservice to set a shorter sync period per user/device.

In addition to this for version 2.0 of KOE we want to implement client side warnings if the synced mailbox is too large or contains too many shared folders.

## 3.2 Installation of the Kopano OL Extension

There are two requirements that must be fulfilled prior to installing a Kopano workspace: First, Outlook 2013 or higher is needed, and second, the user must exist on the Kopano server.

Other than that, there are no special requirements beyond installing the Kopano OL Extension, whose installation package is called `KopanoOLExtension-<version>-combined.exe`

**Note:** It is recommended to have the latest service packs and security patches installed. An installation of Kopano OL Extension on a system with older versions than Outlook 2013 is not supported and will not work.

### 3.2.1 Instructions for Outlook 2013 and higher

1. Go to *Control Panel* > *Mail* > *Show Profiles...*
2. Click on *Add...* and fill in a title, for example *Kopano*. Click *OK*.
3. Select the option *Manually configure server settings or additional server types* and click on *Next*.
4. Select *With Outlook.com or Exchange ActiveSync compatible service* and click on *Next*.
5. Fill in your name, E-mail-Address in the corresponding fields.
6. Fill in the hostname of the Z-Push server in the "E-Mail-Server" field.
7. Fill in the logon data of the user in the Username and Password fields.
8. Choose the amount of Offline-Data that is wanted available, either "1 Month" or "All" and click on *Next*.
9. With the Account settings test successful, close the account test window with a click on *Close*.
10. Click *Finish* to finalize the profile creation.

**Important:** We recommend the Kopano account to be the default account in the Outlook profile. It is possible to have the Kopano account as secondary account and use as primary account for example an IMAP account, yet it is not recommended practice.

#### 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 will appear as a store in Outlook.

By default, the store in Outlook is empty and Outlook instantly starts synchronizing the available data in the store for the selected time period. Depending on the size of the store, the available network connection and system ressources in the backend, this might take some time. Due to the use of the ActiveSync protocol, Outlook behaves very much like a mobile device in synchronization, which allows interruptions. For instance, when Outlook is closed and not fully in sync, the next start of Outlook will continue synchronization where it stopped.

CHAPTER 4

# Configuring Alternative Mail Clients

## 4.1 Client configuration

**Important:** Please note that IMAP and Pop3 access are not enabled by default. "Kopano Feature Management" to either enabled it on a per user basis (recommended) or for the wholser server.

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

For sending mail, clients will use SMTP. An SMTP service can be running on the same system as the Kopano Server, or it can be the SMTP service of the internet provider. Some servers need SMTP authentication. The client can store sent messages in a Sent Items folder.

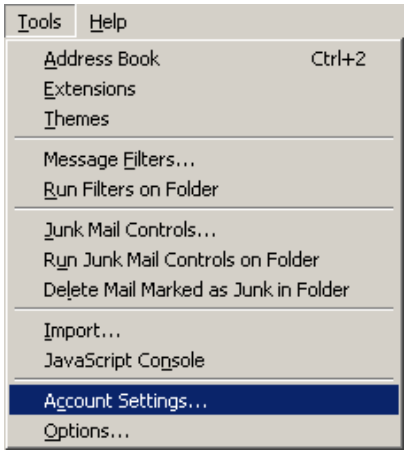
**Note:** SMTP credentials are not necessarily the same as the Kopano credentials.

**Important:** Please have in mind that "/" and "." are illegal characters in IMAP folder names, but are generally possible in MAPI and therefore valid in Outlook und WebApp. Using these characters will lead to folders displayed with different names (for example **RequestSupport** instead of **Request/Support**) when accessed via IMAP. You should not use these characters when planing to use IMAP.

### 4.1.1 Mozilla Thunderbird

The first two steps can be skipped when opening Thunderbird for the first time. The following example is for the IMAP protocol. Setting up the POP3 protocol is similar.

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




Tools dropdown menu

2. Click *Add Account*.
3. Select *Email account* and click *Next*.
4. Fill in your name and Kopano email address and click *Next*.
5. Select *IMAP* and fill in the Kopano server's hostname or IP address. Click *Next*.
6. Fill in the Kopano 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 Kopano 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 Kopano with the IMAP protocol.

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**Important:** For optimal mail handling, it is recommended to change the location of certain folders inside of your IMAP client.

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For example, the location of the **Trash** folder should be changed to the Kopano folder **Deleted items**. This can be accomplished in Thunderbird by going to "Settings" - "Server Settings". The same applies to the **Sent** folder, which should be changed to the Kopano folder "Sent items" by going to "Settings" -> "Copies & Folders".

Optionally, the settings for the folders **Drafts** and **Junk** can be changed as well.

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**Note:** Depending on the language the store was created in, the folder names can vary.

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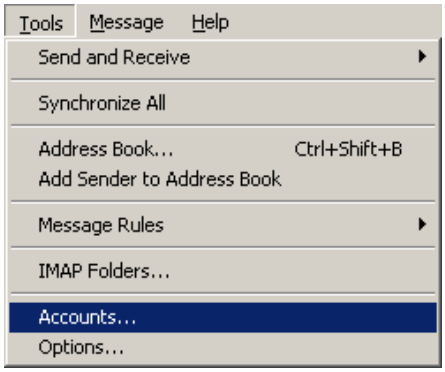
### 4.1.2 Windows Mail

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 is similar.

1. Go to *Tools* > *Accounts*.




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 Kopano 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 Kopano username in *Email Username* and the Kopano 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 Kopano folders.
13. Finally, click *OK* and start using Kopano with the IMAP protocol.

CHAPTER 5

# Configuring CalDAV Clients

This chapter describes how to configure a CalDAV or iCal client for using with the Kopano server. The `kopano-ical` process enables users to view their Kopano calendars using clients like Sunbird, Evolution or Mac iCal. Since ZCP/KC version 6.40, CalDAV clients are also able to synchronise tasks.

To access calendar/task folders on Kopano, the following options are available.

For all clients *but* Mac OS X iCal, use:

| URL | Calendar |
|---|---|
| `http://server:8080/caldav/<user>/<fol der-name>/` | *Calendar/task folder in user's store. Make sure the calendar/task folder already exists.* |
| `http://server:8080/caldav/<user>/<sub -folder>/` | *Self created subcalendar in the user's own store. Location through actual subfolders in Zarafa is irrelevant.* |
| `http://server:8080/caldav/<other-us er>/<folder-name>/` | *Shared calendar/task folder of other user* |
| `http://server:8080/caldav/public/<fol dername>/` | *Calendar/task folder in the public folder* |
| `http://server:8080/caldav/<user>` | */Default calendar of the current user. Although this works for most clients, this URL is not recommended.* |
| `http://server:8080/ical` | *Default calendar of the current user via ical (not recommended)* |

For the Mac OS X iCal client use:

| URL For Mac OS X iCal client | Calendar |
|---|---|
| `http://server:8080/caldav` | *User's calendar list* |
| `http://server:8080/caldav/<other-u ser>` | *Other-users calendar list* |
| `http://server:8080/caldav/public` | *Public folders list* |

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. The 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 |

Please substitute the above mentioned terms with the following values:

| Abbreviation | Description |
|---|---|
| `<user>` | Your username |
| `<other-user>` | Username of the user you want to access (you will still be asked for your personal credentials) |
| `<folder-name>`, `<sub-folder>` | Name of the calendar/task folder you want to access. Name is the same like displayed in Outlook/WebApp. |

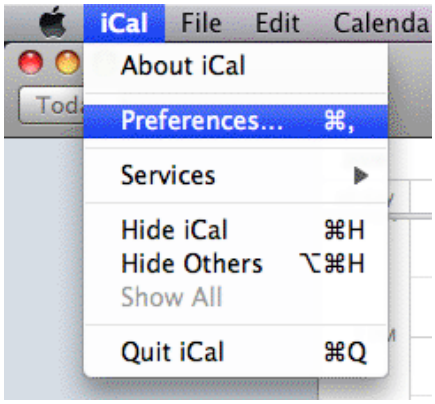
**Note:** The `<other user>` or `<user>/<calendar>` is only reachable if the correct permissions are available. Please make sure the user has not only the appropriate calendar permissions, but also "Folder visible"

permissions on the mailbox of the other user. Otherwise, you will see "Unable to open IPM_SUBTREE object" in the ical error log at the server.

**Important:** Please have in mind that, due to RFC 2617, it is not possible to use CalDAV with users that have a colon (:) in their username.

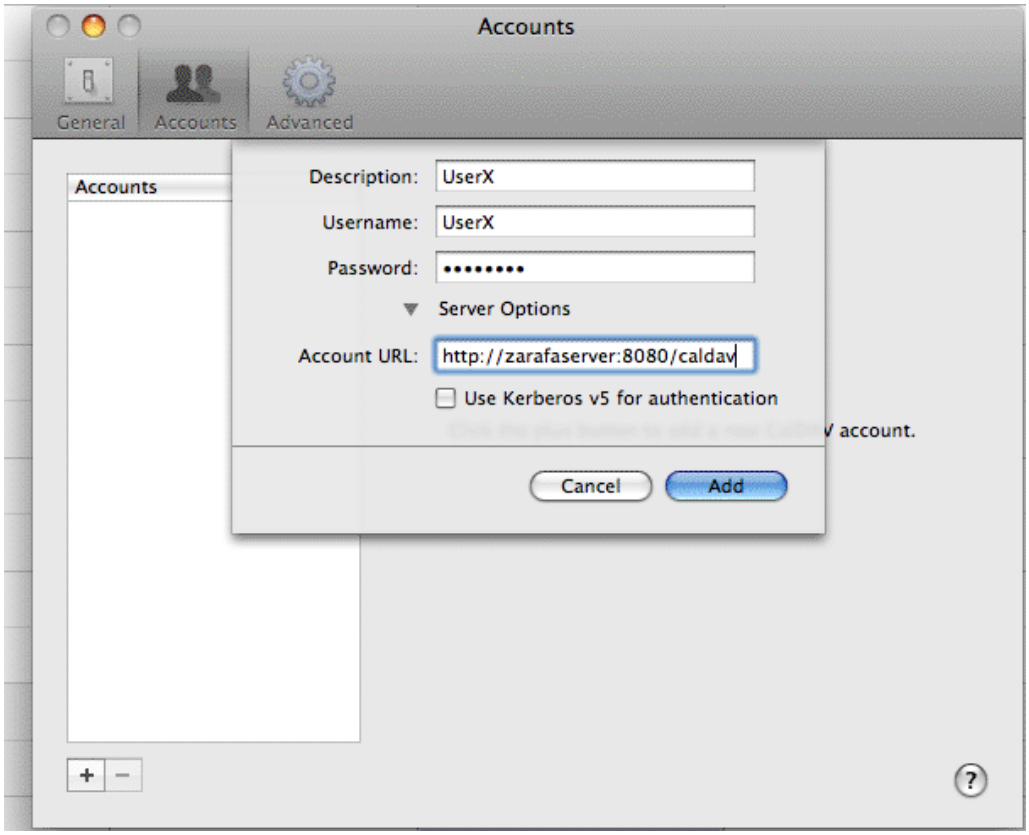
## 5.1 Mac OS X iCal Client

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



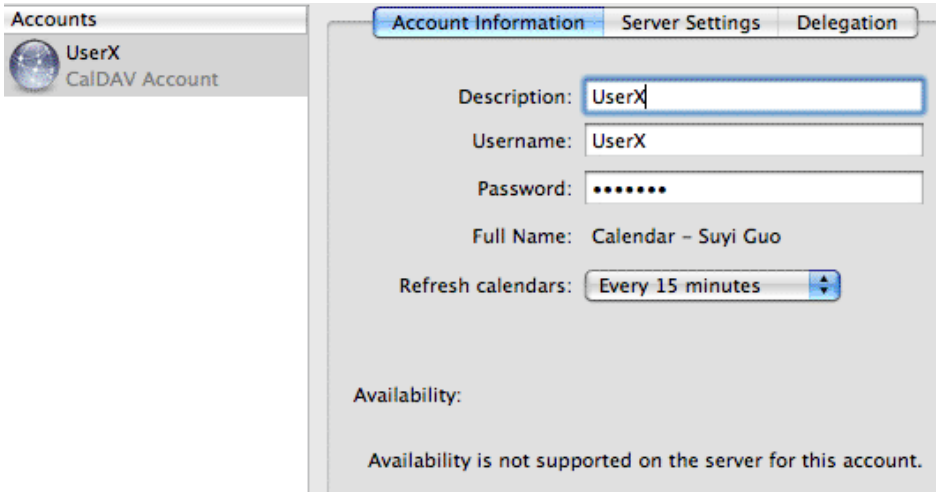

iCal dropdown menu

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



Account details

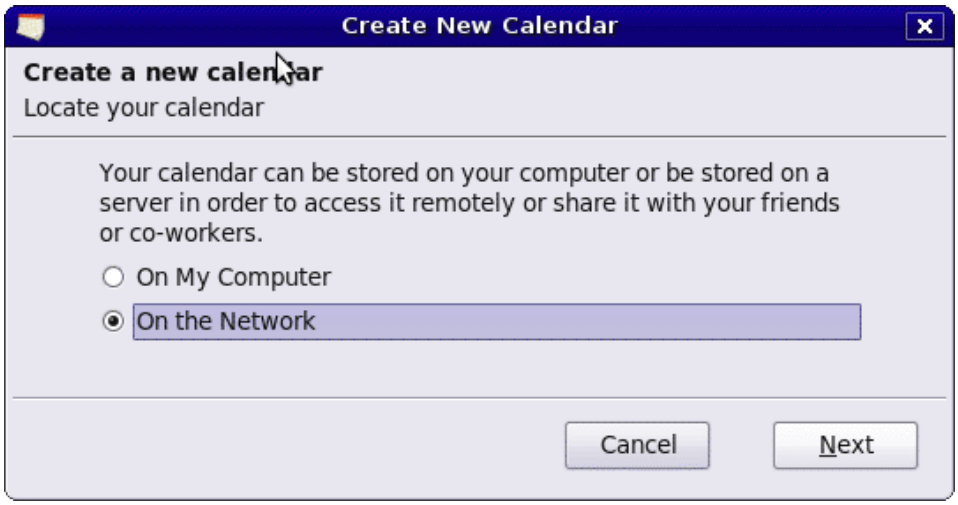
4. Fill in the details. Add server address as: `http://server:8080/caldav/`
5. Click on *Add* to retrieve the calendars of the user.




Account created

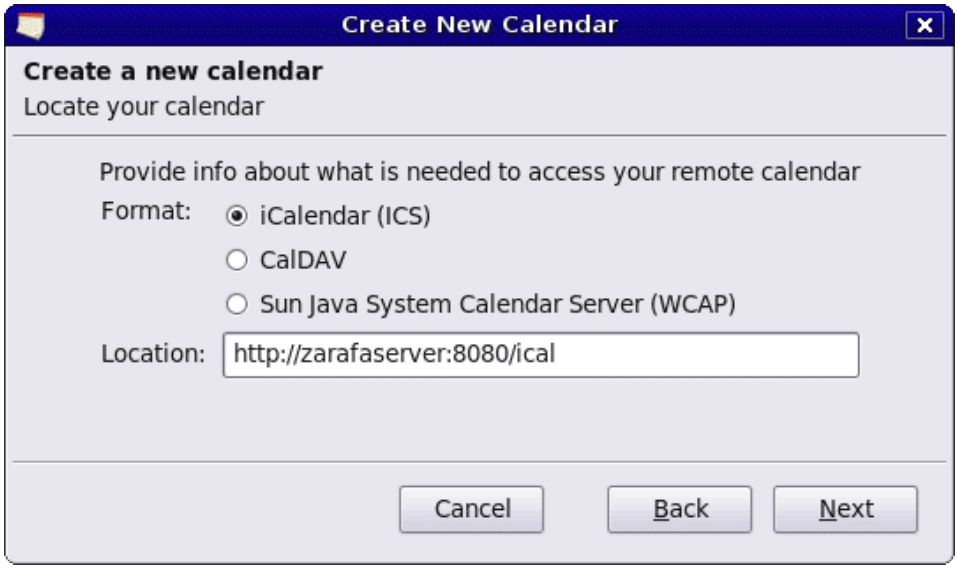
## 5.2 Sunbird Client Guide

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



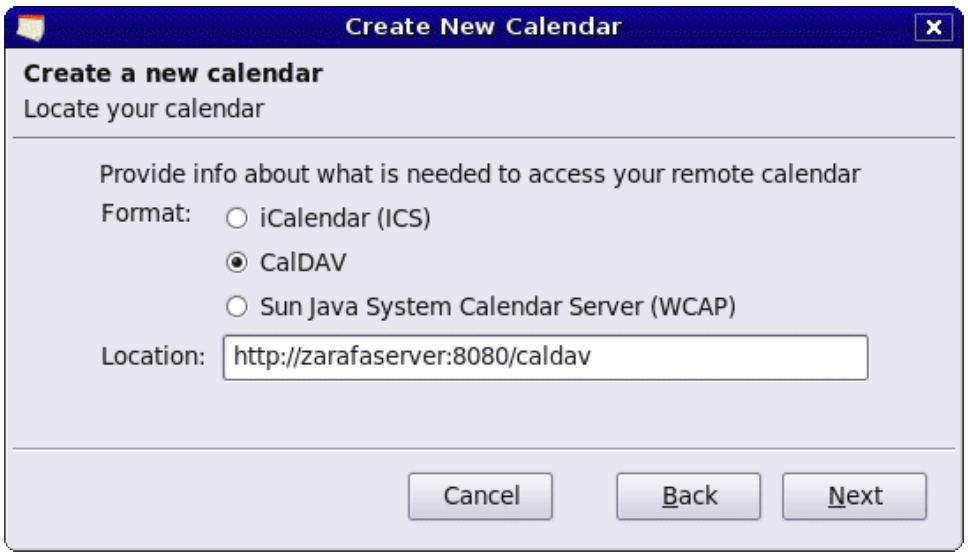

New calendar location

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




iCal details

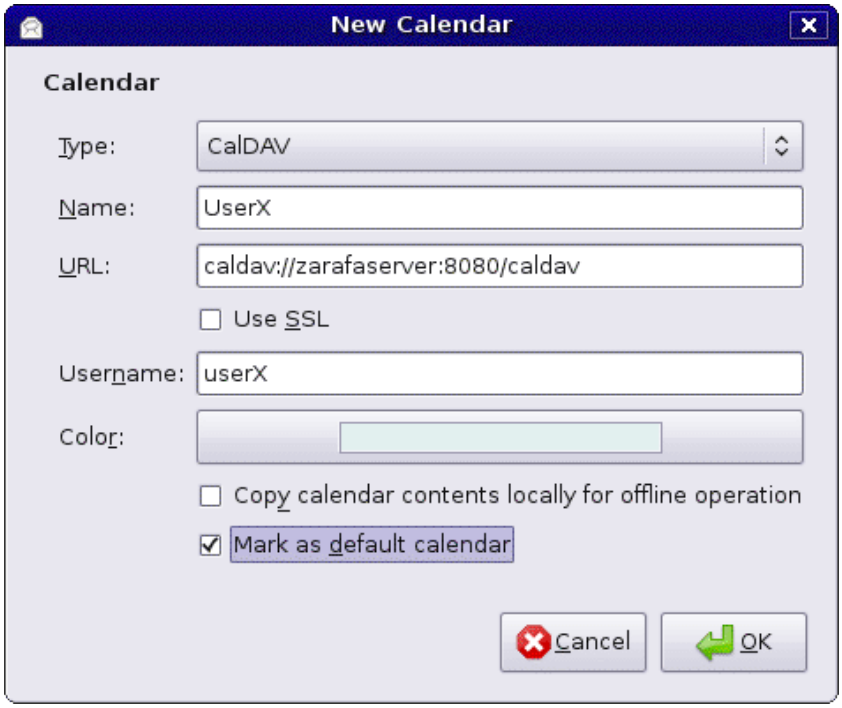
5. For caldav, select *CalDav* option. Enter as location: `http://server:8080/caldav`.




CalDav details

## 5.3 Evolution Client Configuration

1. Start the 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.




CalDav details

CHAPTER 6

# Configuring Mobile Devices

This chapter describes how to configure the Z-Push software to synchronise mobile devices with Kopano Core (KC).

Z-Push is available as an open source project at http://z-push.net.

## 6.1 Z-Push introduction

The Z-Push software allows users with PDAs and smartphones to synchronise their email, contacts, calendar items and tasks directly from a compatible server over LTE, UMTS, GPRS, WiFi or GSM data connections. An overview of devices that are natively supported by Z-Push can be found in the Z-Push Wiki.

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

## 6.2 Setting up a mobile device

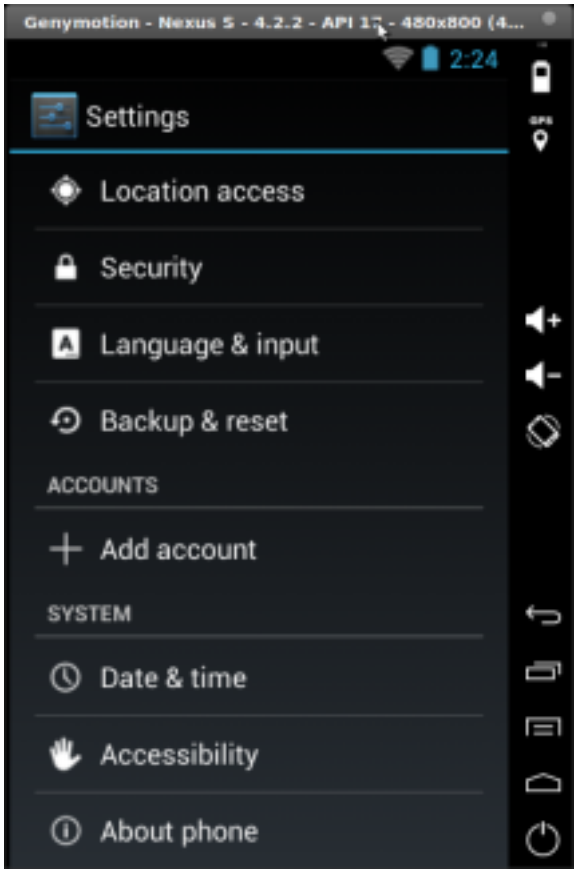
Configuring a device for Z-Push is simply a matter of adding a *Microsoft Exchange* or *Corporate* account to your connected accounts. The connection will be configured by specifiying the IP address or hostname of the server running Z-Push. Please disable SSL, unless SSL has already been setup on the web server. Apart from username and password, some clients also ask for your domain name. This is ignored inside of Z-Push, so you can either leave it empty or use a random string for it.

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

### 6.2.1 Android based configuration

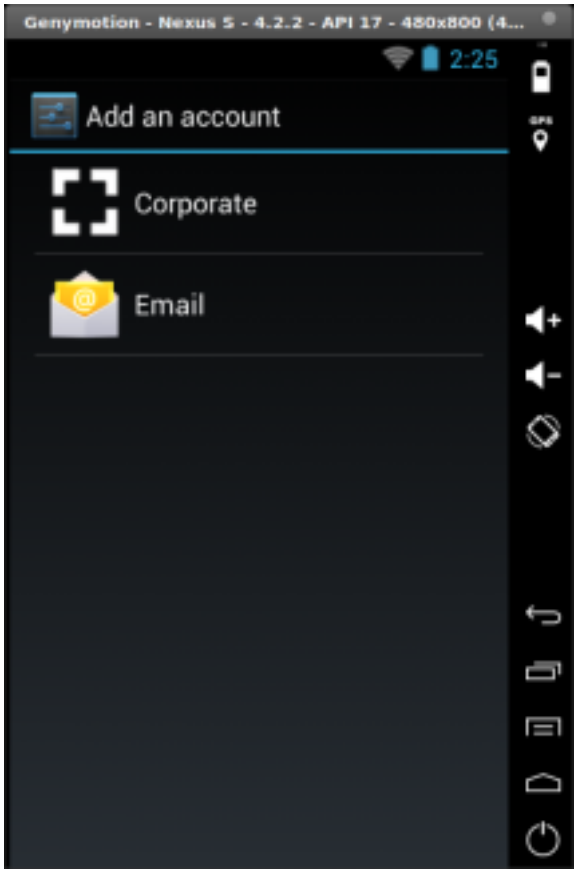
The following steps are applicable for most Android devices:

1. Go into your settings screen and scroll down to the accounts part. There you have to select *Add account*.



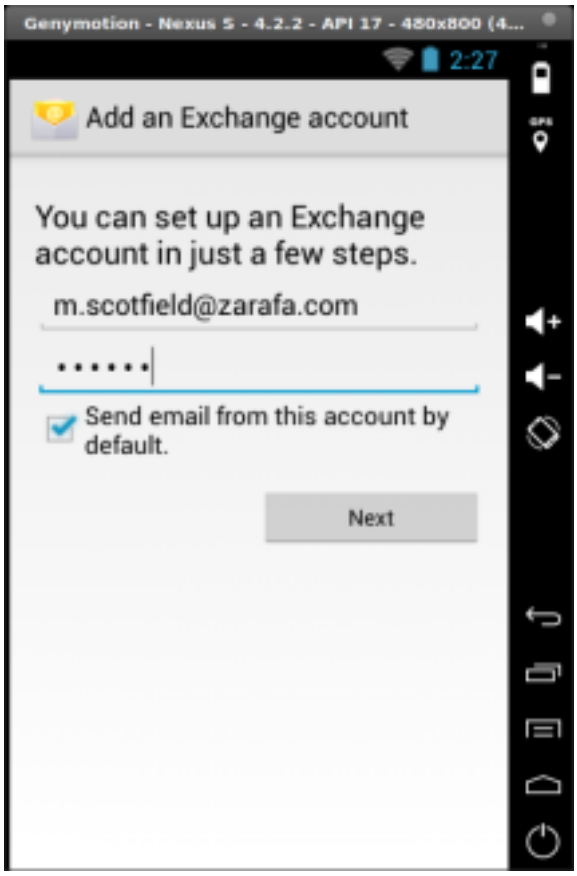

Android Settings

2. Select the ActiveSync account type (in most cases, *Corporate* or *Microsoft Exchange*).



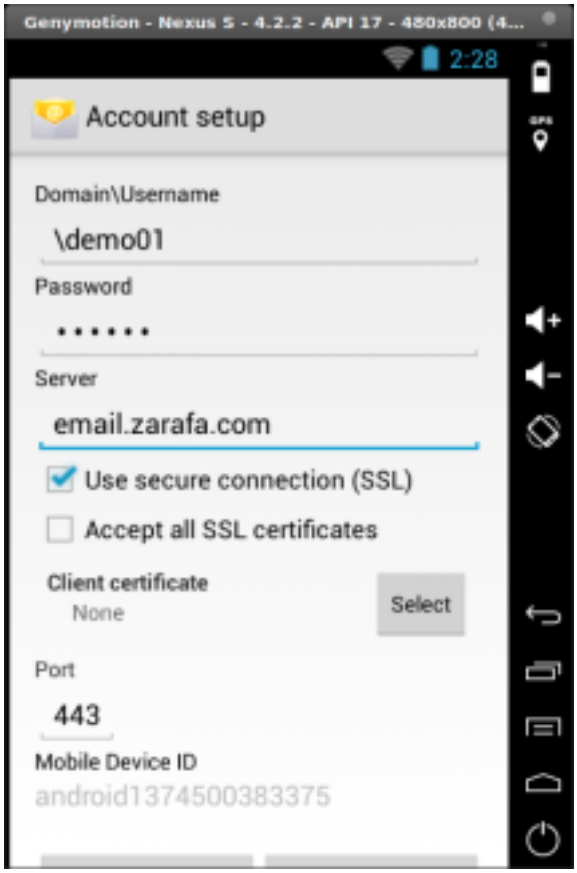
Account Type Selection

3. Android wants to autodiscover your ActiveSync server, and needs your email and password for this.



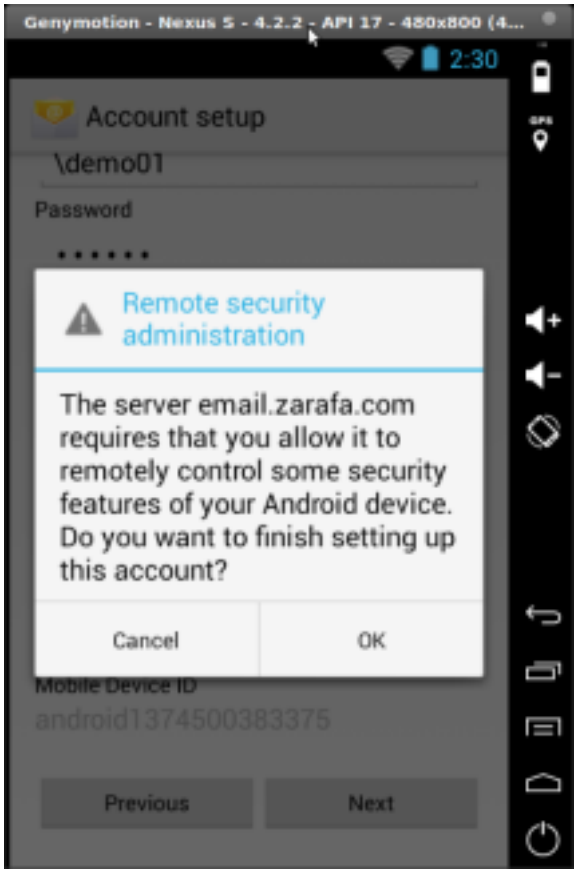

Account Details

4. Afterwards, you have the possibility to specify your exact username and server address if needed (it would otherwise have been *m.scotfield* as username, and *zarafa.com* as server address).



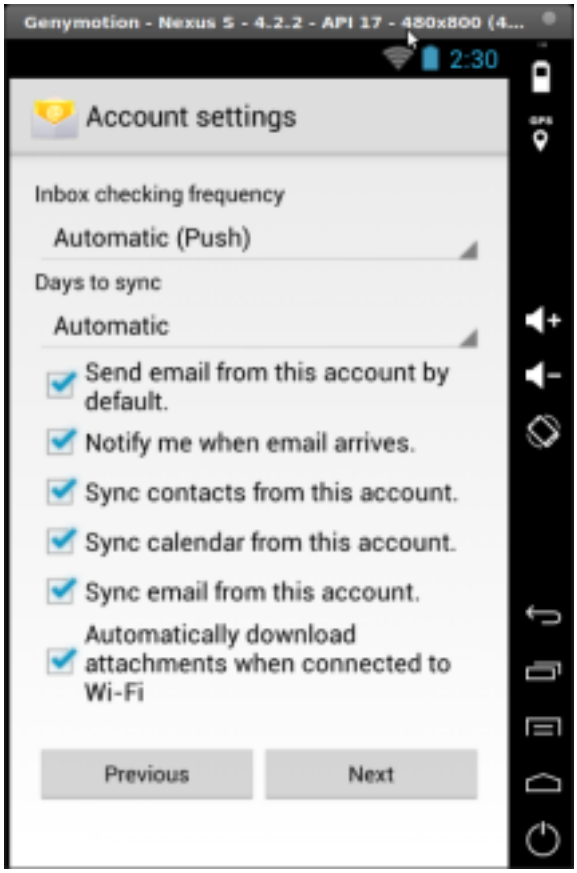

Server Address

5. As soon as you have clicked *Next*, your device will give you a popup notification about needed policies for the server connection. You will be prompted to accept these policies later in the setup.



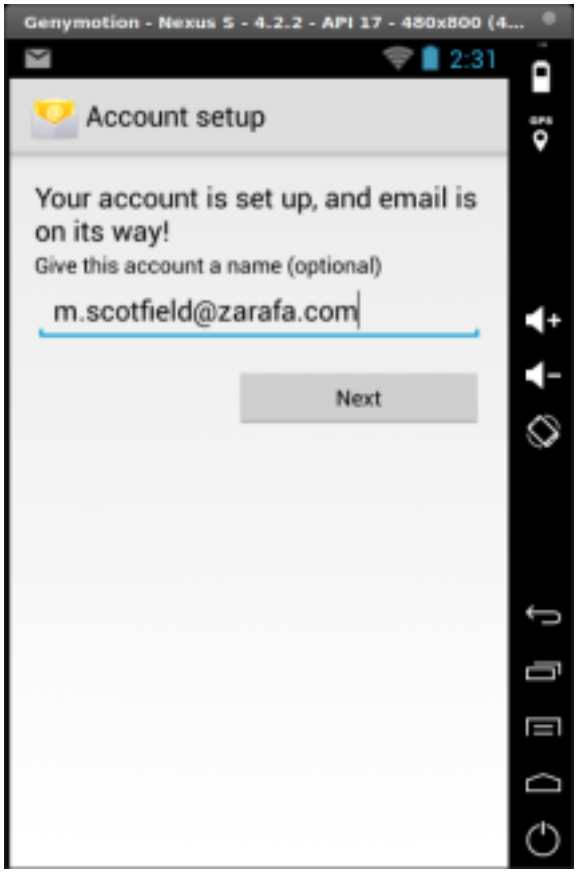

Remote Administration

6. Before accepting the sync policies, you have to choose the frequency for checking the server (*Push* by default), as well as what objects to sync (for example, *contacts* and *calendar*).



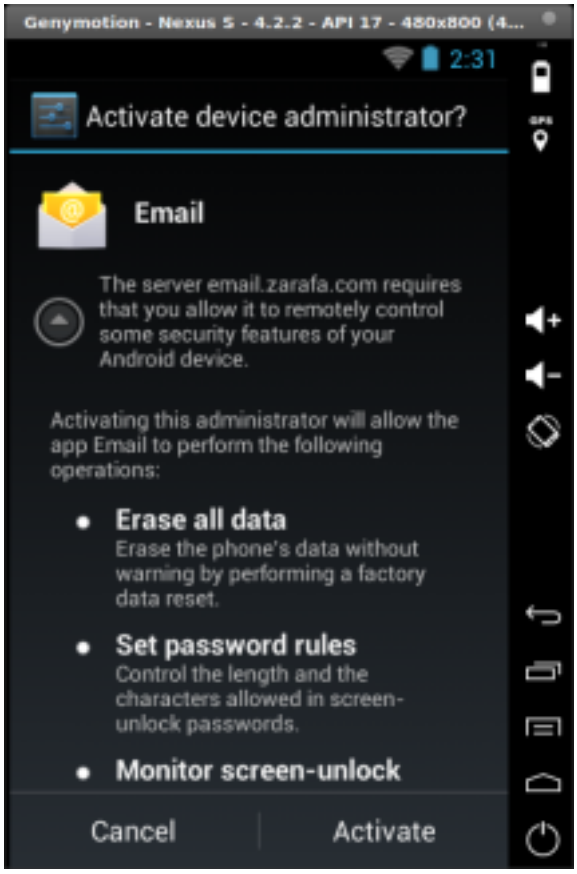

Sync Frequence and other settings

7. If you have multiple accounts connected to your device, you can also specify an identifying name for your connection.




Optional Profile Name for the Connection

8. Finally accept the server policies.



Accept Server Policies

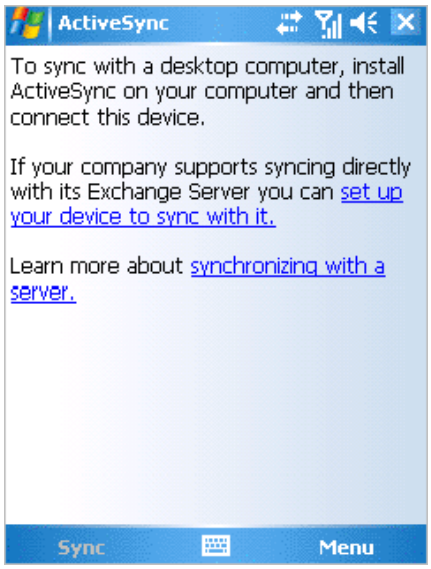
9. After accepting the policies for the device, it will perform an initial sync.

   Your device has been configured

### 6.2.2 Windows Mobile based configuration

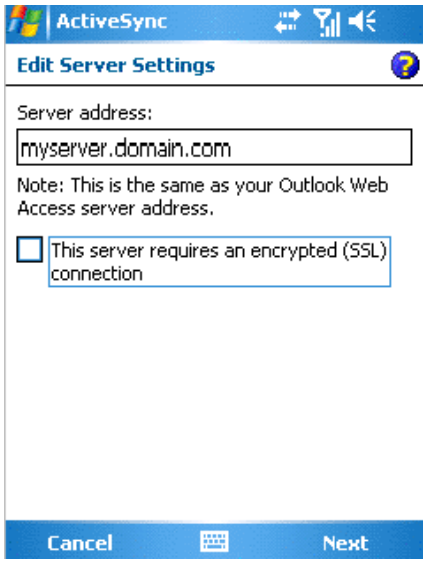
The following steps are for the Pocket PC, though still applicable for WM 5/6 or Nokia's "Mail for Exchange":

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



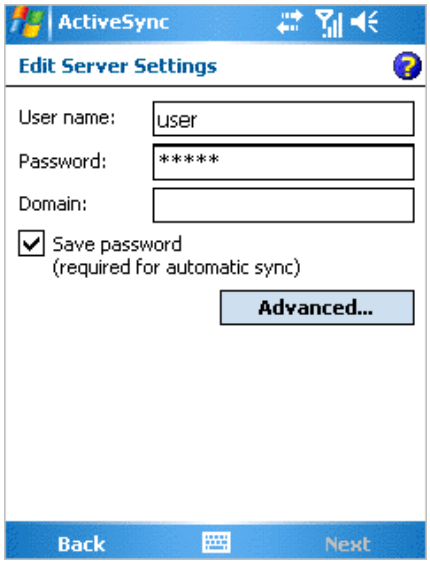

   ActiveSync introduction

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



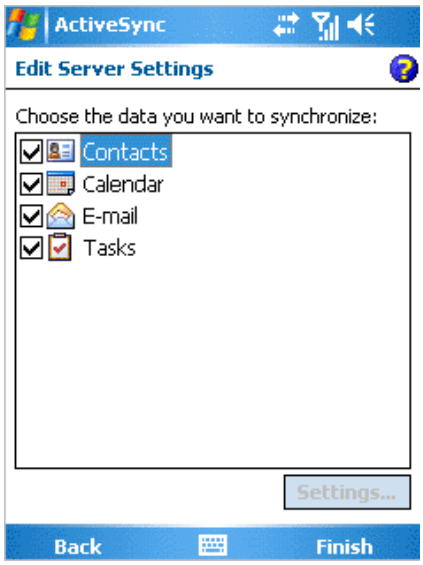

   Server address

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.




Account details

4. Select which items are to be synchronised.



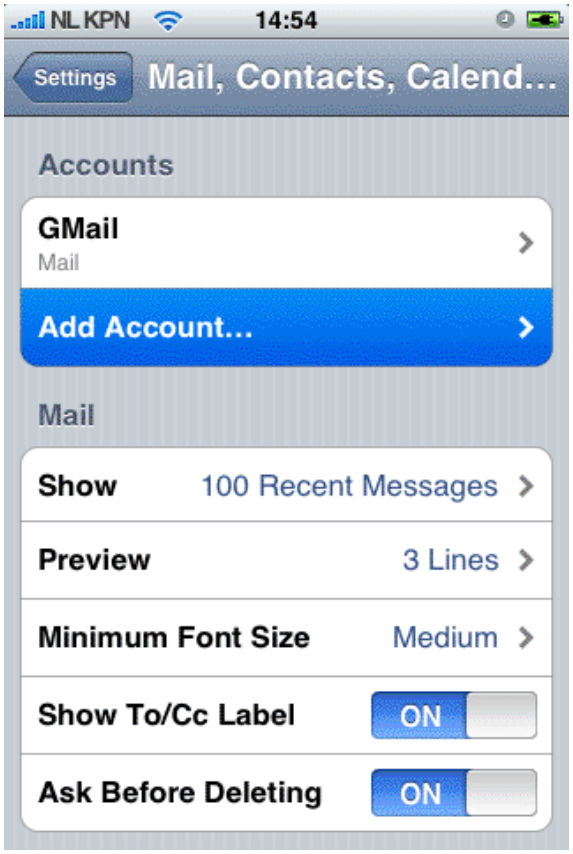

Synchronise options

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

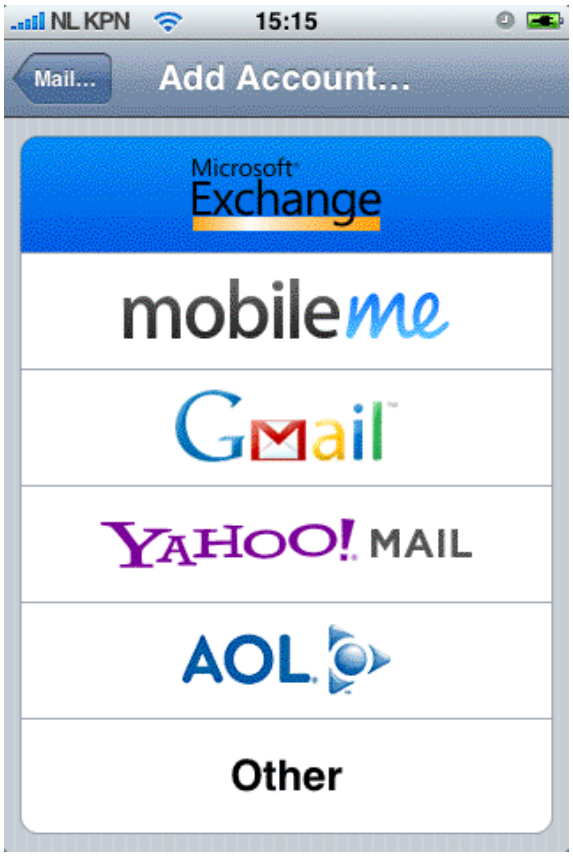
### 6.2.3 iPhone based configuration

The following steps are applicable for the iPhone:

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

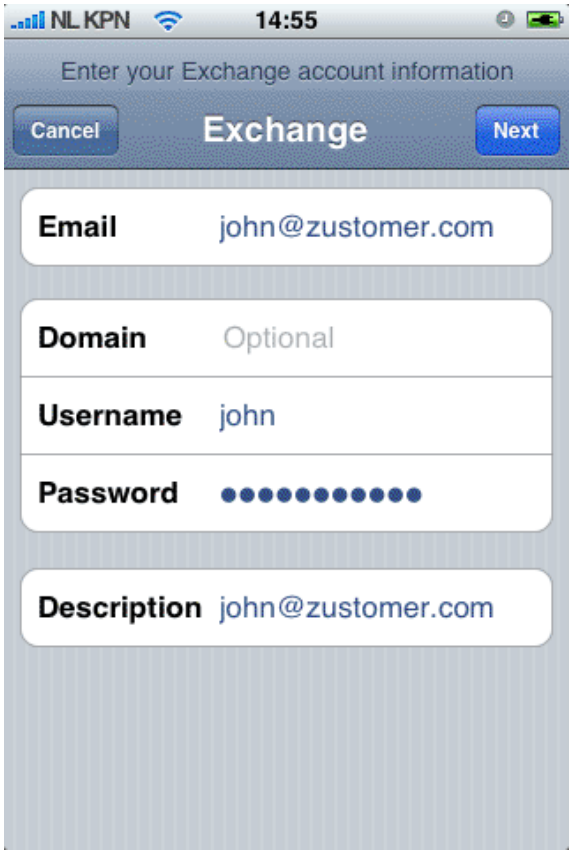



Mail, Contacts, Calendars settings



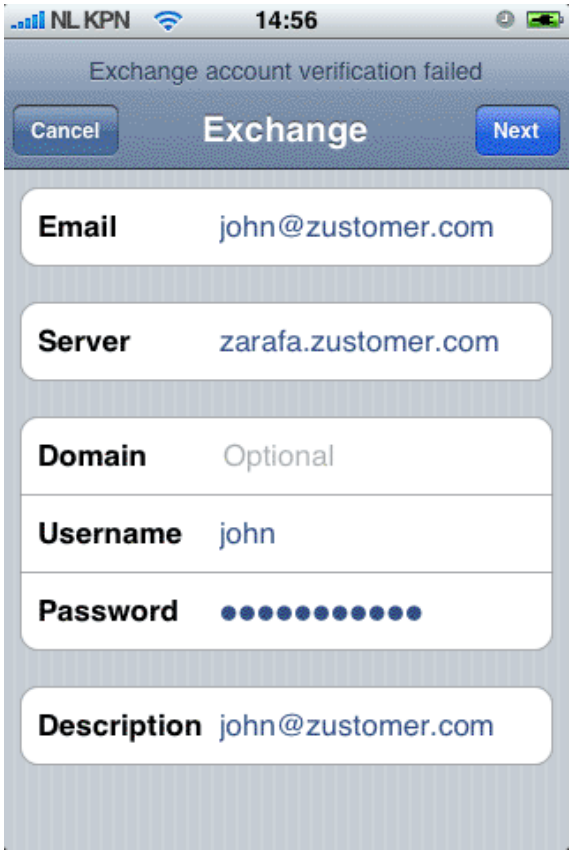

Choice Protocol/Provider

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



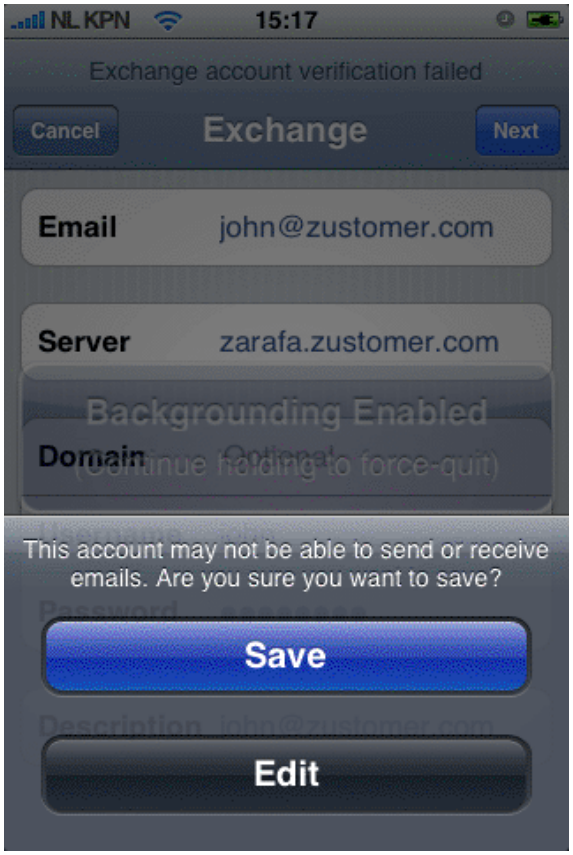

User settings

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 field *Server* will pop up. Enter the correct server hostname or IP address if necessary.

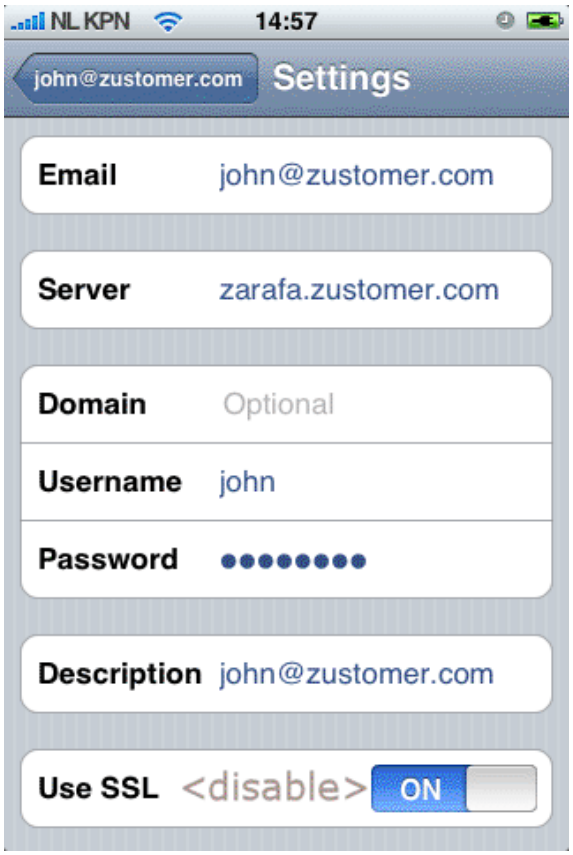



Extra server field

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



Save settings




Account settings

CHAPTER 7

# Using Kopano Archiver

Kopano Archiver is a separate product that has to be installed and configured by the administrator. The Kopano Archiver can be utilised to offload old mails from the users mailbox into an archive mailbox (which can be a dedicated archive mailbox for the user). For the archiving process the administrator can define thresholds when messages in the users mailbox:

- can be copied to the archive,
- removed from the mailbox - while still retaining a reference to the message in the archive (stubbing),
- completely removed from the mailbox,
- completely removed from the archive mailbox.

## 7.1 How can I access a stubbed message?

Messages that have been stubbed can easily be identified by the user, since they are represented with a different icon Kopano WebApp. When opening such an object it is on-demand fetched from the archive store and displayed in the requesting client (Kopano WebApp, mobile phone via ActiveSync, Outlook via ActiveSync, IMAP client). The client may choose to cache the message locally (this happens by default for clients using ActiveSync or IMAP), but since the message stays in the archive mailbox it is not affected b any future server-side runs of Kopano Archiver.

## 7.2 How can I access a message that has been removed from my mailbox?

Administrators can configure direct archive mailbox access for users. If that is the case the archive mailbox will show up for the user, just like any other shared inbox.

CHAPTER 8

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