WebApp User Manual

Release final

Kopano BV

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This document describes the usage of Kopano's clients

CHAPTER 1

Introduction

The Kopano WebApp is the webmail interface of the Kopano Server Package. It contains a set of applications easy to use and accessible through a web browser. It features all major tools used on a daily basis such as email, calendars, contacts, notes and tasks. Furthermore it offers advanced collaboration tools such as instant messaging, presence and webmeetings solutions. As the Webapp is an open platform, developers can create new plugins and integrate it to the interface.

1.1 WebApp Requirements

The Kopano WebApp can be accessed from every major browser. A complete list of the supported browser can be found in the section Browser support in the Kopano WebApp Support Lifecycle Policy document.

On a general note, the last three stable releases of each of these browser are supported. However we recommend to use the latest version of your browser. Both for security reasons and to guarantee the best experience.

While other browsers or other versions of the browsers mentioned above might work as well, Kopano cannot guarantee they will work with WebApp nor provide support in case the users runs into issues.

1.2 Access WebApp

To use the Kopano WebApp, perform the following:

1. Navigate to the link provided by your administrator.
2. Enter your username and password
3. Click on the button "Sign in"

When logging in for the first time, several general settings, such as language, must be setup. They can be changed later in the settings as explained in chapter *Settings*.

Note: By default the URL will look like `https://LOCAL_DOMAIN_NAME/webapp/`. In case it doesn't work, your administrator has not setup the webserver to server encrypted webpages and `http://` has to be used. Be aware that all communication with WebApp will not be encrypted in that case and could be monitored by third parties, including the specified login name and password. Kopano recommends to always use an `encrypted connection`. This will have to be configured by your adminstrator.

1.3 WebApp Overview

The Kopano WebApp consists of the following areas:

The main areas are:

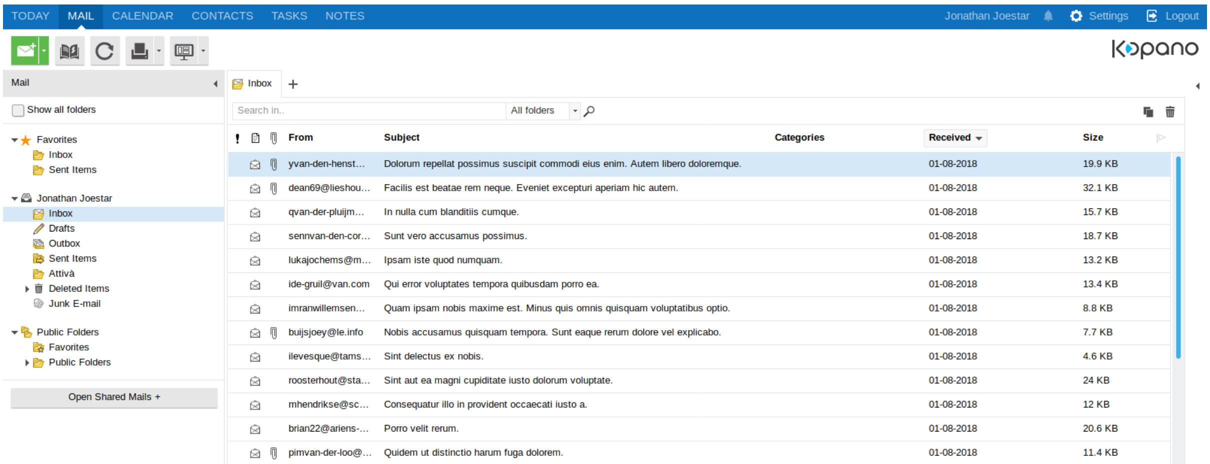

Fig. 1.1: Overview of WebApp

1. **Shortcut Bar** Contains shortcuts to the various applications on the left side. The Settings and Logout button can be found on the right side of the shortcut bar.
2. **Main Toolbar** Contains buttons with the most important functions for each applications. Some buttons offers more options through a drop-down menu.
3. **Folder Navigation Pane** Provides an overview of the folders that are part of the users' mailbox, the archive mailboxes, any additional mailboxes that have been opened and *Public Folders*.
4. **Main Window** Displays the main content of the application. Use the Search field to quickly find items in the current application.

CHAPTER 2

Mail

In this chapter we explain how to use the Kopano Mail application. After reading this chapter, you will be able to send a mail message, manage your mailbox and share folders with your colleagues.

2.1 Sending Mail messages

1. Select the *New message* button in the Main Toolbar.
2. To add a recipient, either add their email address in the *TO*, *CC*, or *BCC* field manually, or select a person from the Address Book.
3. Attachments can be added to the email by selecting the *PaperClip* button.
4. The email can be marked as high or low priority by clicking on the according symbols or the gear icon next to them.
5. The current state of email can be saved by selecting the *FloppyDisk* button. After an email is saved, it is stored in the *Drafts* folder.
6. Enter your text message and, once ready, click on *Send*

Note: The BCC (as well as the From) field is hidden by default, but can be enabled by clicking the according symbols.

2.1.1 Send email to distribution list

You can add a distribution list in the same way you add a contact. More information about creating distribution lists can be found in the section *Distribution Lists*. It is also possible to expand a distribution list. With expanding, the name of the distribution list will disappear and you will be able to see all the users that were originally member of the distribution list. To expand the distribution list click on the + sign next to the distribution list.

2.1.2 Edit as New Message

You can re-use a mail message from any folder as if it was a new message for further customization:

1. Go to the folder containing the mail you want to use
2. Right-click on the mail
3. Select the option "Edit as New Message"

2.1.3 Using Mailto: links

The WebApp supports the usage of Mailto: links. When a mailto: link is clicked, the webapp automatically creates a new mail, with the adress in the *to:* field.

2.2 Managing the Mailbox

The Kopano WebApp stores the mails inside folders. There are two kinds of folders that are present in your mailbox. The first one are *default* folders. These are required for the mailbox to function such as *Inbox*, *Sent Items*, *Drafts* or *Deleted Items*. Therefore it is not possible to rename, move or delete these. The second one are *normal* folders. These folders can be arranged according to your needs. Creating, moving, renaming, copying or deleting (sub) folders is accessible by right-clicking on the Folder Navigation Pane.

Note: Your administrator can select the language in which the *default* folders can be named.

2.2.1 Deleting items

The *Deleted Items* folder is where all deleted mails and deleted folders can be found. It can be emptied by using the right mouse button, and selecting option *Empty folder* from the context menu.

2.2.2 Restoring items

It can happen that an mail is deleted by accident. By default all deleted mails are stored in the *Deleted Items* folders and from there, they can be restored. However it's possible that the deleted mail cannot be found there either. In that case you can still recover it by using the soft delete function:

1. Right-click on any folder from the hierarchy, for example the 'Deleted Items' folder
2. Select the "Restore Items" button from the context menu
3. Select a message to restore it from the list and click on "Restore"

If you can't find the wanted item in the restoring dialogue, then it is unfortunately lost. Contact your administrator to see other restore options are available.

Note: By selecting multiple items (hold ctrl and select multiple items), you are able to restore multiple items. Select multiple items and then press the "Restore" button.

Note: When you use *Shift-Delete*, the mail won't be available from the 'Deleted Items' folders. You'll have to perform the instruction above from the original locations.

Warning: The button "Permanent delete" and "Delete all" are, as its name indicates, the functions to permanently delete mails from your mailbox.

2.3 Sharing Folders

You can share folders inside your mailbox and set permissions allowing other users to create,read,edit or delete items on this folder. The instructions below explains how to set it up. Next to this, it is also possible to allow coworkers to work on your behalf. More information on this is provided in the chapter *Delegates*.

1. Right-click on the folder you want to share.
2. Click on *Add*. The Adress Book opens.
3. Select the person (or group) to give permissions to and click *Ok*
4. Choose a Permission Profile or set the Permissions you want to grant.
5. Click on *OK* to save.

2.3.1 Public Folders

A special part of the folder hierarchy is dedicated to *Public Folders*. A public folder is a folder visible to all users that have access to it. The owner of a public folder can set its permissions to allow users or a group of users to access and edit it. Public folders offer an easy way to share folders and items. It is easy to organize shared content as the hierarchy of public folders will be visible to the other users.

Note: *Shared Folders* and *Public Folders* offer some of the same features. The main difference is that *Public Folders* are visible by everyone by default while *Shared Folders* must first be opened by a user before becoming visible in the *Folder Navigation Panel*.

CHAPTER 3

Calendar

In this chapter we explain how to use the Kopano Calendar application. After reading this chapter, you will be able to setup meetings and appointments, work with multiple calendars and share calendars with coworkers.

Note: An appointment is an item in the calendar of a user which is only applicable to him or her. No other participants have been invited. A meeting is an item in the calendar of a user which has more than one participant. As soon as a user invites a coworker and/or schedule a resource with any appointment, it automatically becomes a meeting.

3.1 Creating an appointment/meeting

Adding a new appointment/meeting goes as follow:

1. Go to the Calendar application.
2. Select the *Appointment* button in the Main Toolbar. The "New Appointment" window opens.
3. Insert a subject for the appointment and optionally a location.
4. Select a start and end time for the appointment.
5. Additionally attendees can be added using the *Invite Attendees* button.

Note: Enabling the reminder option will trigger a reminder pop-up prior to the appointment. The reminder time is adjustable in the field next to the reminder option. When the reminder pops-up you will be able to either *Open* the item, *dismiss* it, or *Snooze* it.

3.2 Accepting a meeting invitation

When invited to a meeting, you will receive a meeting invitation. Four options are available at the top of the invitation:

- Accept
- Tentative
- Decline
- Propose New Time

The actions for each options is self-explanatory. Using *Proposing New Time* you can propose a new date or time. The proposal will be sent to the meeting organizer who can either accept or decline it.

3.3 Sharing calendars

You can share your calendar and allow co-workers to create/edit or delete items. It can be done using the same steps as decribed in section *Sharing Folders*.

3.4 Accessing shared calendars

Provided your colleague granted you permissions to view a calendar, as described in the previous section, you should now be able to add it:

1. Go to the Calendar application.
2. Click on *Add Shared Calendar*
3. Click on *Name* to open the Address Book.
4. Select the user from whom you want the calendar.
5. Click on *Ok*

CHAPTER 4

Contacts

In this chapter, an explaination will be given on how to use the Contact application. You can acces the application through the main windows or while After reading this chapter, you will be able to create and edit a contact.

4.1 Create a new contact

Adding a new contact happens as follow:

1. Go to the Contact application.
2. Click on the *New Contact* button. An empty *Contact* form appears.
3. Fill all relevant information.
4. Click on *Save*

Note: With the option *Private*, the contact can be hidden from colleagues that have access to your *Contacts* folder. Unless you have given the colleague access to view your private items. More information can be found in chapter *Delegates*.

4.2 Detailed contacts

Details of the contact can be viewed / changed by opening the contact. Global Address Book contacts cannot only be changed by the administrator.

4.3 Distribution Lists

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

A new distribution list can be created as follow:

1. Select the *Contacts* folder the new distribution list has to be created in.
2. In the *New* button dropdown menu select the option *Distribution List*. A dialog as shown in “New Distribution list window” will open.
3. Use the button *Select Members* to select contacts from the *Address Book*.

Note: Alternatively, the *Add New* button can be used to create a new contact that is added to the distribution list immediately.

CHAPTER 5

Tasks

In this chapter we explain how to work with Tasks. After reading this chapter, you will be able to create a task, to assign them and to use the To-Do List Overview. It is also possible to share your task folders and to open the shared ones. An explaination of that can be found in *Sharing Folders*.

5.1 Create a new task

A task is created with the following steps:

1. Select the folder Tasks.
2. Use the button *New* to create a new task.
3. Fill in the preferred fields.
4. Use the *Save* button to confirm.

5.2 Task requests

Task request differs from a regular task in that it can be assigned to someone. When clicking on *Assign Task*, a *To* field appears where the assignee's address can be filled or it can be selected from the address Book using to *To* button.

A task request can either be accepted or declined by the recipient. It can be done by clicking on the corresponding *Accept/Decline* button Upon reading a task request, a corresponding assigned task is created in the assignee's tasks folder.

Note: If the assignee chooses to assign the task to someone else, the new assignee becomes the owner.

When a task request has been accepted, the assginee can make changes to any of the fields of the task. The changes can be saved via the corresponding Save button. If the person whom assigned the task chooses to track progress, an 'task updated' message is sent once the assignee saves changes

Note: A task update report is always sent when a task is accepted, declined or completed.

Once the assignee has completed the task, the assigned task can be marked as complete. This will send a 'Task Completed' message to the person whom assigned the task.

5.3 To-Do List Overview

In the Tasks application the To-Do List is used to have an overview of the to-do's (tasks and flagged items):

1. To show a list with the to-do's (tasks and flagged items) either in a Simple view or a Detailed view.
2. To show a dialog to view or edit an item from the list. Or to create a new task. On top of the dialog there is a toolbar with buttons to save the item, delete the item, set a new flag to the item, mark the item as complete, add attachments to the item, print the item, add categories to the item and to mark the item as private.

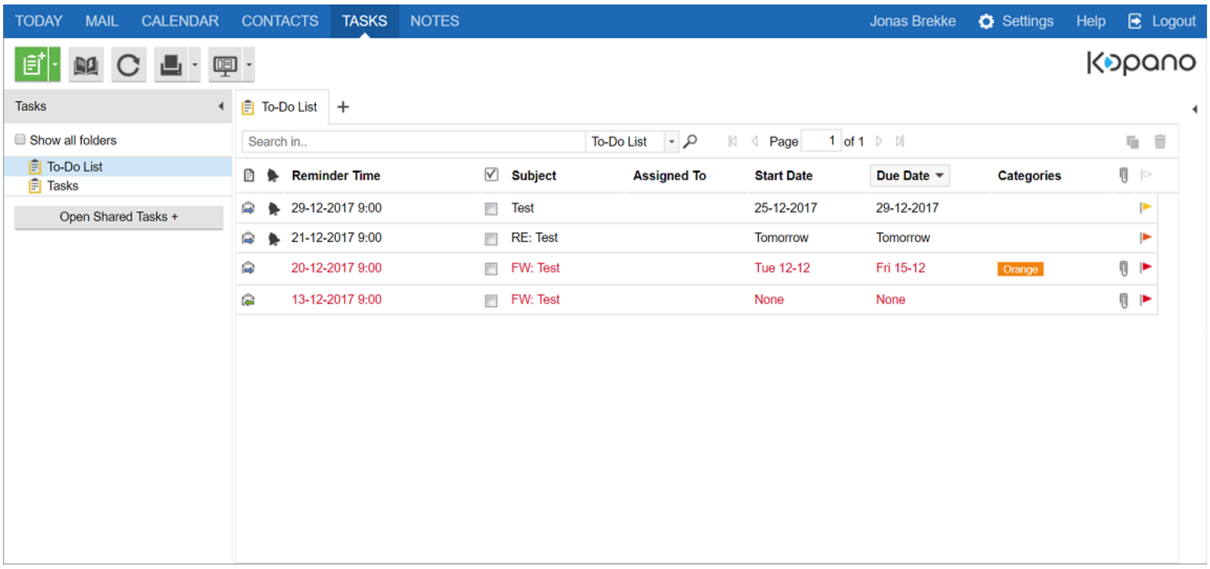

Fig. 5.1: To-Do List Overview

Note: A flag is set depending on the Start date and the Due date of the task. When Start date is set to Monday of next week and the Due date is set to Friday of next week the 'Next week flag' will be shown.

Note: Overdue flagged items are styled in red. Overdue tasks are styled with a strike-through.

CHAPTER 6

Notes

Notes are a great tool to write ideas down, write down a phone number or make a shopping list. You can use notes for lots of different purposes, but most of all you can use notes the way you please. In this chapter a explaination on how to make a note and how to share it will be given.

6.1 Create a new Note

You can make notes as following:

1. Go to the Notes application.
2. Select the *Sticky note* button in the Main Toolbar. The "Note" window opens.
3. Save it by on cliking on *Save*

6.2 Sharing notes with colleagues

Notes can be shared with coworkers through the folder sharing functionality of Kopano as explained in *Sharing Folders*. The following subsection explains how to open shared notes.

CHAPTER 7

Settings

In the *Settings* menu, you can customize your account according to your needs. Many options are available, so take the time to go over them. In this chapter, an explaination will be provided on the most common used features:

- How to configure your signature
- How to setup your out-of-office message
- How to add rules to your mailbox

Note: Don't forget to make your setting permanent by clicking on *Apply*.

7.1 Set Signatures

The Kopano WebApp is capable of managing multiple signatures and also using distinct signatures for new messages and replies and forwards. You can set signatures as follow:

1. Click on *Mail* in the Settings menu
2. In the section Signatures, Click on *New*
3. Set a custom signature name
4. Compose your signature

Signature Templating allows you to use attributes in your signature. These are fields which corresponds to attributes set on your account. As this functionality depends of the server setting, please refer to your administrator to see if you can use it. If so, the wanted changes can be submitted to him and, once processed, the signature will be updated automatically.

WebApp recognizes an attribute as *{%attribute}*. The following two subsections list all available ones. Refer to your administrator to know which one can be used. If unused, this attribute will not appear in the signature. An example signature is given here:

```
{%initials}{%lastname}
{%title}

{%phone}
```

7.1.1 General items

The subsection lists all general attributes:

```
{%firstname}
{%initials}
{%lastname}
{%displayname}
{%title}
{%company}
{%department}
{%office}
{%assistant}
{%phone}
{%primary_email}
{%address}
{%city}
{%state}
{%zipcode}
{%country}
```

7.1.2 Telephone items

In the case more phone numbers are saved on your account, you can use the following attributes to choose which one will be shown:

```
{%phone_business}
{%phone_business2}
{%phone_fax}
{%phone_assistant}
{%phone_home}
{%phone_home2}
{%phone_mobile}
{%phone_pager}
```

7.2 Out of Office

Whenever you go out of office, you might want to notify your colleagues about your absence. The message will be send to every incoming mail directly sent to a user. Hence, no reply will be sent to messages addressed to a distribution list. To avoid spams, the reply will only be send once a day, even if multiple message were sent from a sender. This setting can be changed by your administrator. You can setup your out-of-office message as follow:

1. Click on *Out of Office* in the Settings menu
2. Select *I am out of the office from:*
3. Sent dates
4. Fill in the subject
5. Compose your message

Note: Please refer to your administrator to check if there are any restrictions or guidelines on using the Out of Office functionality.

7.3 Rules

In the *Rules* section, you can set rules to filter email based on different values. When first opening this setting, a list will be shown with all current rules. Follow these staeps to create a new rule:

1. Click on the *New* button above the list.
2. Set a rule name to recognize your new rule
3. In the drop-menu under *When the message...* select the condition(s) for which the rule will be triggered.
4. In the drop-menu under *Do the following...* select what WebApp must do
5. Click on *Save*

Rule can be edited or deleted using the respective buttons.

Note: Mail filters can be set for another users. Contact your administrator to enable that. Be aware the entire shared store should be opened with Owner permissions. You can find more information in the section *Permissions overview* in the corresponding chapter.

Permissions

As soon as you want to share an item or open a shared one, the notion of permission will come up. Kopano allows you to set who can access which folder on your account. In this chapter, permissions will be discussed. First an overview of the permission profile will be presented. Then a word about exceptions will be given. Finally an example will be given:

8.1 Permissions overview

An overview of all activities possible for each profile is presented in the following table:

Permission \ Profile	Owner	Full control	Secretary	Only read	None
Create items	Yes	Yes	Yes	*no*	*no*
Read items	Yes	Yes	Yes	Yes	*no*
Create subfolders	Yes	Yes	*no*	*no*	*no*
Set folder permissions	Yes	*no*	*no*	*no*	*no*
Actually see the concerning folder	Yes	Yes	Yes	Yes	Yes
Edit all items	Yes	Yes	Yes	*no*	*no*
Delete all items	Yes	Yes	Yes	*no*	*no*

Furthermore it's possible to set custom permissions to allow specific actions while preventing others. For example you can allow your colleague to edit items without allowing him to create them. When customizing permissions, the profile will change to "Other".

Warning: While in WebApp it's possible to edit a meeting without being able to delete it, Outlook doesn't make this distinction. Therefore if you wish to allow a colleague to access and edit your agenda using Outlook, you must grant at least secretary permissions

8.2 Exceptions

Next to individuals, you can also grant permissions to any group appaering in the addressbook. Then the permissions will be applied to the members of this group. While in principle it is not possible to setup exceptions, it is however possible to explicitelly specify them for one specific person.

Note: In order to see a subfolder, the correct permissions must be set on the parent folder.

8.3 Examples

First take the protagonists from "How I Met Your Mother" and assume they use a Kopano mailserver. In order to facilitate the planning of their night at Mc Larens, they use a group called "The gang" where they are all members. They share their personnal agenda using "Only read" permission with this group. Now all six members can open and view each other's availability.

Then imagine they want to organize an Intervention (nfa: Unannounced meeting to convince someone to quit a bad habit). The one concerned (let's say Ted) must not be aware of it. To make sure of that, one member creates a subfolder "Intervention" in his agenda where he set the permissions for Ted as "None" and unchecks "Folder visible". Now the group can plan the Intervention without having Ted knowing it.

Delegates

The Kopano WebApp allows you to select who can work on your behalf. This is referred as *delegation*. For example you can grant permission to colleagues to send emails on your behalf.

Kopano distinguishes two kinds of delegations:

1. **Send on Behalf of**-delegation: These can be set by the user. Mails and others items sent using this delegation can be recognized by the modified *From* field: "<user> on behalve of <otherUser>".
2. **Send As**: These are set by your administrator. It implies that you impersonate someone else. When set, the recerver won't see that you sent the email on behalf of someone else.

Important: The user defined delegation has a higher priority on the server. If a user has privileges to both *send as* and *on behalf of*, he will always send *on behalf of*. Also in the standard configuration each mail that is *send as* a user or *on behalf of* a user will also be placed in the sent items of this user.

9.1 Add delegates

Follow the following steps to add delegates to your account:

1. Go to *Settings* menu
2. Select *Delegates*
3. Click on *Add...* The Globa Addressbook opens
4. Select the person or group you want to add as a delegate
5. Click on *OK* The *Delegate Permissions* screen pops up
6. Set the desired permissions as described in the next session and click OK
7. Click on *Apply*

An explanation of the permissions is provided in *Permissions overview*.

Note: If you notice that the group you want to add as a delegate is not in the list, this is probably because the group is listed as a *Distribution Group*. Contact your administrator for more information.

9.2 Working on behalf of somebody else

Once the permissions have been granted, the user can start working on behalf of. You can either send a email or schedule a meeting.

9.2.1 Sending email

Sending an email on behalf of someone else, is similar to section *Sending Mail messages*. The one addition is to click on *Show From* button. The *From:* field will now be added above the *To:* field. Here you can select on behalf of who the mail will be sent.

Note: In case delegation permissions have not been granted for a certain user, the email won't be sent. You will receive a bounce message soon after the mail has been sent.

9.2.2 Scheduling a meeting

To schedule an appointment or meeting on behalf of someone else, first open his/her calendar. Then schedule the meeting as described in section *Creating an appointment/meeting*.

Note: If you have a shared calendar opened which you have write permission, a drop down menu will appear in which you can choose in which calendar the meeting will be created.

CHAPTER 10

Extending Webapp

The functionality of the WebApp can be extended by using plugins and widgets. In this chapter an explaination will be given on how

Note: Widgets and plugins can only be installed and removed by your administrator. Please contact him if you to use one of the plugins/widgets described below.

10.1 Widgets

Widgets are miniature applications running inside the WebApp. They can be used in the widget sidebar and The Kopano "Today" application. To view the sidebar, either click on the clear area of the widget sidebar for a quick view or click on the arrow to keep the sidebar open.

By default the widget sidebar will be empty. To add widgets:

1. Make sure the widget sidebar is shown, as described above.
2. Click the + icon next to the *arrow*. A popup will appear as shown in "The widget chooser popup window".
3. Double-click on the widget that should be added to the widget sidebar. The widget will now be added.
4. If there are already widgets on the sidebar, the new widget will be added to the bottom. Widgets can be rearranged by clicking on its title bar and moving it to the desired position.

10.2 Plugins

When installed, plugins can be enabled via the plugin tab in the settings dialogue. Check the ones you wish to use and click on *Apply*.

CHAPTER 11

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