IceWarp Unified Communications

IceWarp Outlook Connector 4 User Guide

Version 10.2

Ice///arp®

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CHAPTER 1

IceWarp Outlook Connector 4

The IceWarp Outlook Connector 4 allows you to synchronize information between your IceWarp Server account and Outlook.

- Small plug-in compatible with Microsoft (Office) Outlook versions 2003 and 2007 (recent Service Pack required)
- Not compatible with Outlook Express
- Enables to synchronize Calendars, Contacts, Events, Notes, Tasks, Journals with the server and share them with other users
- Push capability for instant updates of new or changed items
- Supports all items and entries in Outlook including attachments, folders, vCards, iCalendar, vFreeBusy information, attendees, planning, etc.
- Unicode support for input in any language
- Simple, user friendly interface
- IceWarp Options for autoresponder, forwarder and rules
- Advanced access rights management
- Most of the features/functions of Outlook are supported (over 95%)
- Resource management, public folders sharing, public address books
- Appointments/tasks scheduling, voting, grouping, sharing
- Multiple accounts under one profile to access emails and shared resources
- Auto-subscription to all public and shared accounts

This manual describes how to install the Outlook Connector, register the product and quickly set up some of its features.

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Installing IceWarp Connector

This chapter lists installation pre-requisites and details step-by-step installation procedure.

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Pre-Installation Checklist

 Microsoft Outlook must be installed on the machine where you want to install IceWarp Connector, but it should not be running.

NOTE that there are times when Outlook appears not to be running but it actually is. You can check by look for OUTLOOK.EXE in the Windows Task Manager. If it is listed, shut it down (End Task) before you begin.

- You should be reasonably confident in using the Office Outlook.
- You should have your account name, password, and server name (hostname) at hand you will need these to configure your account.
- You need to know whether you want to integrate your account into your default Personal Folder or have a new Personal Folder created.
- You should have downloaded the latest version of the IceWarp Connector from the IceWarp website http://www.icewarp.com or from your local provider of IceWarp Server (e.g. http://mydomain.com/install/) or from the WebClient interface in the Tools – Licenses menu – Download tab.
- You need Activation Key for its registration, e-mailed from your administrator or available from the WebClient interface in toolbar: Tools - Licenses - Outlook Connector tab.
- You may be required to insert your original Outlook installation media. Make sure that you have your original Outlook installation media available before you intend to change your Outlook configuration.
- Make sure that Outlook is setup as the default e-mail client.

To verify this on Windows 7 or Vista, see the **Default E-mail Client in Windows 7 or Vista** (see "Configuring Default Email Client" on page 11) chapter.

To verify this on other Windows versions, go to **Control Panel – Internet Options – Programs** and make sure that Outlook is selected in the drop down box.

 Outlook Connector will only install on systems where the user has administrative rights. The user's rights can be changed to install the Outlook Connector and then reset to the original rights.

Installation

Once having the latest IceWarp Connector Installer file (connector-setup.exe) downloaded, follow these steps:

- 1. Double-click the file to run installation.
- 2. In the Welcome dialog, click Next.
- 3. In the License Agreement dialog, read the License Agreement, select the *l accept the agreement* option and click *Next*.

🔂 Setup - IceWarp Connector	x
License Agreement Please read the following important information before continuing.	
Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.	
END USER LICENSE AGREEMENT Note: This is a legal agreement between You (our Customer) and us, IceWarp Ltd. (IceWarp), which governs your use of the IceWarp Connector or any of its components selected by you on the Component License Sheet. By using IceWarp Connector, you agree to be bound by the terms and conditions of this Software Licence Agreement. You are not allowed to use IceWarp Connector without agreeing to the terms and conditions hereof.]
This Software Licence Agreement is for the full version of IceWarp Connector and provides you also a right to access without additional payment all released	
I accept the agreement	
© I do not accept the agreement English	
http://www.icewarp.com < Back Next > Can	cel

4. Create New Outlook Profile

IceWarp Connector will automatically create a profile for Outlook. The default *Profile Name* for this profile is IceWarp Connector. This "default name" is a user defined field and may be changed if desired.

Check the **Prompt for which profile to use when starting Outlook (Recommended)** box, if you have multiple profiles in Outlook. Selecting this will prompt for profile selection when Outlook starts.

🕞 Setup - IceWarp	Connector
Create New Out Creates a new p	Iook Profile profile for the IceWarp Connector
Profile Inform	ation
Profile Name:	IceWarp Connector
Prompt for w	hich profile to use when starting Outlook. (Recommended)
Outlook where created for use Both your existi for which profile a profile every t	Outlook uses to remember the email accounts and settings that tell your email, contacts, and appointments are stored. A new profile will be with the Connector so your existing settings and data are preserved. Ing profile and the new profile will be available after installation. If "Prompt to use when starting Outlook" is checked, you will be prompted to select me Outlook starts. See the User Guide or Outlook help for information on of to change this setting.
English	
http://www.icewarp.c	om < Back Next > Cancel

Please refer to the **New Profile Creation** (see "Creating New Profile" on page 14) chapter for details on creating/modifying an Outlook profile before/after the installation of Outlook Connector.

5. Account Information

This screen provides the IceWarp Connector with the information needed to create the Outlook profile and email account during the installation process.

The following basic information is needed to complete this screen:

- Your Name
- E-mail Address
- IMAP Server Address
- SMTP Server Address
- Username

Password

B Setup - IceWarp Connector		
Account Information These settings are used to	configure Outlook and the Connector	
User Information:		
Your Name:	John Doe	
E-mail Address:	john.doe@icewarpdemo.com	
Server Information:		
Incoming Server (IMAP):	mail.icewarpdemo.com	
Outgoing Server (SMTP):	mail.icewarpdemo.com	
Logon Information:		
User Name:	john.doe	
Password:	•••••	
Remember F	assword	
English		
http://www.icewarp.com	< <u>B</u> ack Next	t > Cancel

6. In the **Select Destination Location** dialog, if you want to change the installation folder, select it using the **Browse** button. After selection or if you do not want to change the suggested location, click **Next**.

🔂 Setup - IceWarp Connector
Select Destination Location Where should IceWarp Connector be installed?
Setup will install IceWarp Connector into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Program Files\Icewarp \IceWarp Connector Browse
At least 14.7 MB of free disk space is required.
English

7. In the IceWarp Connector Toolbar Options dialog, select whether you want to have the Connector toolbar in MS Outlook hidden or not. (*No* is recommended.)

Click Next.

🔂 Setup - IceWarp Connector	
IceWarp Connector Toolbar Options Do you want to hide the IceWarp Connector Toolbar?	,
Do you want to hide the IceWarp Connector Toolbar?	
⊘ Yes	
No	
English	
http://www.icewarp.com < Back Next > Cancel	

8. In the **Ready to Install** dialog, resume settings and click the *Install* button to finish installation.

Setup - IceWarp Connector	
Ready to Install Setup is now ready to begin installing IceWarp Connector on your computer.	
Click Install to continue with the installation, or click Back if you want to review change any settings.	or
Destination location: C:\Program Files\Icewarp\IceWarp Connector	
Hide IceWarp Connector toolbar: No Profile Name: IceWarp Connector	=
IMAP/SMTP Settings:	•
English	Cancel

9. Setup Complete

To start Outlook, place a check in the box labeled *Run Outlook* and select *Finish*.

Setup - IceWarp Connector	
	Completing the IceWarp Connector Setup Wizard Setup has finished installing IceWarp Connector on your computer. Click Finish to exit Setup. Image: Run Outlook
http://www.icewarp.com	< <u>B</u> ack <u>Finish</u>

Registering

After installation, IceWarp Outlook Connector works in 30 day evaluation version and will stop working if not registered before the evaluation period expires.

1. Check the existing license:

Your administrator could have enabled automatic license registration which takes place transparently during the setup.

- To check if you need to register your copy, click the About button in the Outlook Connector toolbar.
- If it says "License expires" on some date in near future, you need to register your copy.

IceWarp Connector 4.0		8 23
About		
	Cal: Enabled Kolab: Not Installed	
http://www.icewarp.com		
IceWarp Connector 4.0.0-0930550		
Copyright 2002-2009 IceWarp, Ltd All Rights Reserved		
License expires on Friday, October 30, 2009	License	
		OK

2. To register the Outlook Connector on-line, you will need an Activation Key.

Activation Key can be emailed to you by server administrator. You can also find the Activation Key in WebClient interface, in menu Tools - Licenses - Outlook Connector. If you have not received it or it doesn't show in WebClient, contact your IT staff.

• In Outlook, click **About** button in the toolbar, click the **License** button in the bottom of the window, then stay on the **Online Activation** tab.

License	×
Online Activation Enter License Offline	
 Acquire your activation key via WebClient (Tools - Licenses menu) or from your administrator. In order to obtain the license, enter the activation key into the below field and press "Activate License." 	
Activation Key: eJwBggB9/+Mh5oc03I0L9vbcUDn6zKKGp4RzjAujvFAAyb1hroJ50D StYGaf6BarM4HkmJrLx1W7x3NQ4p6+94ww2udVQHYISpNZuVMAx7DY y68UpjjhtgGwOkjVAwufUOTc4i8ZuThwFc6qA7389bTjWDWASJ+1EF aNZRh0jCizIFqMFs+qswP2AkMR	
Identification Key: 4C8ECAE9-9C4FCB45-92A7FECD-5A9A7C73-MW	
Activate License	
ОК	

• Copy and paste the *Activation Key* previously obtained from your administrator to the dialog. You can also find the *Activation Key* in WebClient interface, in menu **Tools - Licenses - Outlook Connector**.

- Click the Activate License button. The button will only be active if you enter correctly formatted Activation Key.
- You should be informed that registration has been successful, or that there has been an error.
- 3. License registration may fail for the following reasons:
 - The Activation Key is expired- you will need a new one and repeat the registration.
 - The computer is blocked from accessing the Internet or access to the licensing server is temporarily unavailable.

• The number of client licenses has been exceeded for your organization. IceWarp licensing servers track how many systems have been activated using a given license. If the number of activated clients exceeds the total for the license, Outlook Connector will inform you that additional licenses need to be purchased.

• If you need to re-install Outlook Connector software on a new system due to either hardware failure or system upgrade, contact your support staff to assist you with removing the existing Outlook Connector registration, or request a new **Activation Key**.

4. To register Outlook Connector off-line, you will need to obtain *license.xml file* from IceWarp website.

If the on-line activation fails because your computer cannot access the license server, you can still register the product using a *license,xml file,* which will be provided to you in exchange for *Activation Key* and *ldentification Key*.

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- Open this link in your browser by double-clicking it: http://shop.icewarp.com/
- From the left-hand menu, select Client Activation.
- Copy the Activation Key into the field where indicated.
- Switch to Outlook, click the License button in the About window.

• Copy the *Identification Key* to the clipboard (using Ctrl+A, Ctrl+C or double-click it, right-click the selection and select Copy).

- Switch to your browser and paste the *Identification Key* where indicated and click OK.
- Download the *license.xml* file from the web page to your computer.
- In Outlook, About License dialog, change to the Enter License Offline tab.
- Click the Enter License File.. button.
- Browse for the *license.xml* file, double-click it or click Open.
- You should be informed that the registration was successful.
- 5. If you are unable to register the Outlook Connector, please contact your support helpdesk or IT administrator.

Configuring Default Email Client

For Windows 7 or Windows Vista, it is necessary to set Outlook as the default email client (if not already set).

To configure it, do the following:

1. During IceWarp Connector installation, the Default E-mail Client Configuration dialog is shown.

Click the **Configure** button.

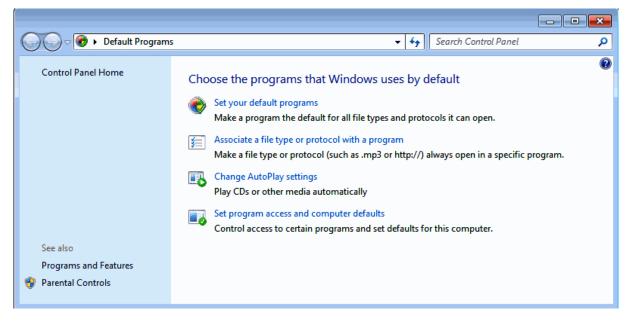
🔂 Setup - IceWarp Connector	
Default E-Mail Client Configuration Microsoft Outlook is the not the default e-mail client.	
Microsoft Outlook needs to be the default e-mail client in order to install th	is product.
Click on the "Configure" button below to launch the "Internet Options" to default e-mail configuration.	change the
Configure	
In the "Internet Options" configuration window, select "Microsoft Office O "Microsoft Outlook" for "E-mail".	utlook" or
English	
http://www.icewarp.com < Back Next >	Cancel

2. In the Internet Properties dialog, go to the Programs tab.

Click the Set programs button.

😪 Internet Properties 💦 💌
General Security Privacy Content Connections Programs Advanced
Default web browser
Internet Explorer is the default web Make default browser.
Tell me if Internet Explorer is not the default web browser.
Internet Explorer (64-bit) cannot be the default browser.
Manage add-ons
Enable or disable browser add-ons Installed in your system.
HTML editing
Choose the program that you want Internet Explorer to use for editing HTML files.
HTML editor: Microsoft Office Word
Internet programs
Choose the programs you want to use for other Internet services, such as e-mail.
OK Cancel Apply

3. In the **Default Programs** dialog, click the **Set program access and computer defaults** link.



4. In the Set program access and computer defaults dialog – *Chose a default e-mail program* section, select the *Microsoft Office Outlook* option.

Click **OK** to finish configuration.

(🔊 Set	Program	Access and Computer Defaults				x
			figuration specifies default programs for certain a as are accessible from the Start menu, desktop, an			ng e-mail, and	
	Cho	ose a confi	guration:				
	0	Non-Mic	crosoft			*	•
	۲	Custom				*	
		Choose a	a default web browser :				
		۲	Use my current Web browser				=
		\odot	Internet Explorer	V	Enable access to this program		
		Choose a	a default e-mail program :				
		\odot	Use my current e-mail program				
		۲	Microsoft Office Outlook	V	Enable access to this program		
		Choose a	a default media player :				
		۲	Use my current media player				-
					OK Cancel	Help	

Creating New Profile

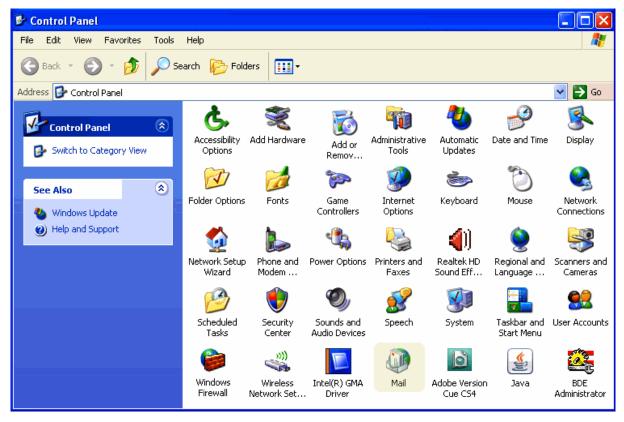
If Outlook **has been** installed previously and a user profile has been created, it is recommended that you allow the Outlook Connector installer to create a completely new profile during the installation process.

If Outlook *has not been* previously installed, it is recommended that you do not create any user profiles before you install Outlook Connector.

You will be assisted by the setup program to create the Outlook profile. If you made a mistake during the installation or for any other reason you need to create a new profile before or after the installation, this chapter provides you with the necessary steps.

The following steps describe how to create a new email profile:

- 1. In the **Start** menu, click the **Control Panel** item.
- 2. In the Control Panel window, double-click the Mail icon.



3. In the Mail Setup dialog, click the *Show Profiles* button.



4. In the **Mail** dialog, click the **Add** button.

Mail	X
General	
. The following profiles are set up on this computer:	
Add Remove Properties Copy When starting Microsoft Office Outlook, use this profile: Prompt for a profile to be used Always use this profile Outlook	
OK Cancel Apply	

In the New Profile dialog, fill in the Profile Name field and click OK.

New Profile	\mathbf{x}
Create New Profile	OK Cancel
Profile Name:	
IceWarp Outlook Connector	

The Add New E-mail Account wizard opens.

5. On the Auto Account Setup page, tick the *Manually configure server settings ...* check box and click *Next*.

Add New E-mail Acc	ount 🔀
Auto Account Setu	P
Your Name: E-mail Address:	Example: Barbara Sankovic Example: barbara@contoso.com
Password: Retype Password:	Type the password your Internet service provider has given you,
	< Back Next > Cancel

6. On the **Choose E-mail Service** page, select the **Other** option and click the **IceWarp Connector 4.0** item. Click **Next**.

Add New E-mail Account	×
Choose E-mail Service	×
 Internet E-mail Connect to your POP, IMAP, or HTTP server to send and receive e-mail messages. Microsoft Exchange Connect to Microsoft Exchange for access to your e-mail, calendar, contacts, faxes and voice mail. Other Connect to a server type shown below. IceWarp Connector 4.0 Outlook Mobile Service (Text Messaging) 	
< Back Next > Co	ancel

On the IceWarp Connector Settings page, fill in all fields. Optionally, tick the *Remember password* check box if you want the Connector to remember it. Click the *Test Account Settings* button – if settings are correct, you will obtain confirmation message. Click *OK*.

IceWarp Connector 4.0		
IceWarp Connector Settings Each of these settings is required to get yo	our account working.	
User Information		
Your Name:	Demo	
E-mail Address:	demo@domain.com	
Server Information		
Incoming Mail (IMAP):	demo.domain.com	
Outgoing Mail (SMTP):	demo.domain.com	
Logon Information		
User Name:	demo	
Password:	••••	
Remember password		
Test Account Settings		More Settings
		OK Cancel

- 8. On the **Congratulations** page, click the *Finish* button.
- In the Mail dialog, select the Always use this profile option and select the created profile name. Click OK.
 The profile with your e-mail account is created.

Multiple Accounts

However it is not possible to use two or more Outlook Connector accounts within one profile (the same situation applies for two Exchange accounts – see http://support.microsoft.com/kb/291626 http://support.microsoft.com/kb/291626), it is still possible to have a combination of different account types here:

A) The default account of your profile is a "Connector type" one. Other accounts will be standard IMAP ones. For information about creation of a profile and default account, refer to the **Creating New Profile** (on page 14) chapter.

 When creating another account in the same profile, click the *Tools* item of the main menu and select *Account* Settings ... – Email – New...

The Choose E-mail Service dialog opens:

Add New E-mail Account	×
Choose E-mail Service	
Microsoft Exchange, POP3, IMAP, or HTTP Connect to an e-mail account at your Internet service provider (ISP) or organization's Microsoft Exchange server.	your
Other Connect to a server type shown below.	
IceWarp Connector 4.0 Outlook Mobile Service (Text Messaging)	
< <u>B</u> ack <u>N</u> ext >	Cancel

Select the *Microsoft Exchange, POP3, IMAP or HTTP* choice and click *Next*.

- 2. Follow the account creation procedure described in the **Creating New Profile** (on page 14) chapter starting from step # 5.
- 3. In the step # 6, select the *Internet E-mail* option.
- 4. Ignore step # 9.

B) The default account of your profile is a "Connector type" one. Other accounts will be shared ones. (Account sharing can be done via MS Outlook (within the Connector settings), IceWarp Server administration console or IceWarp WebClient.)

To add a shared account in IceWarp Connector, do the following:

1. Click the *IceWarp Connector* main menu item and select *Sharing*. The Sharing dialog opens.

Sharing	×
Suggested Accounts	Subscribed Accounts
car1@icewarp.com (Ford - 2A4 8826) mike2@icewarp.com (Mike2)	
	>>>
	>>>
	Close

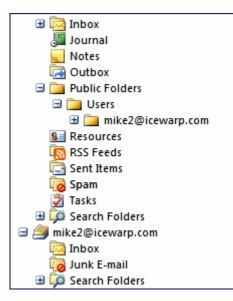
- 2. In the *Suggested Accounts* frame, select the wished account and click the *right arrow* button to move this account to the *Subscribed Accounts* frame. Click *Close*.
- 3. Click the *Refresh Folders* within the **Outlook Connector** tool bar.

NOTE: In this case, you will not be able to send emails from this shared account.

To be able to send emails, you can either:

- reveal the From field in the message composer window (Options Show From) and fill in the right address.
- or add the same account again as the IMAP type now.

MS Outlook folder tree with both a shared account and IMAP one (mike2@icewarp.com):



IceWarp Options

Selecting **options** from the sub-menu of an account opens the Account Options dialog where you can set Responder and Forwarder information for your email account:

Responder Options

IceWarp Options		×
Responder Forwarder Ru	es	
Responder		
Mode:	Respond again after a period	•
Respond again after (Days):	7	
Respond only if between:		
Reponder Message		
From:	bruce@icewarp.com	
Subject:	Away on Holiday	
Message text:	I am sorry to say I am away from the office at the moment. Your message has been forwarded to another member of the team who should get back to you shortly.	~
	Regards,	~
	<u><</u>	>
	<u>O</u> K <u>C</u> A	ancel

Field	Description
Mode	Choose a Mode from the drop-down box:
	Disabled
	No Response is set.
	Respond Always
	A response is sent for every message that comes in.
	Respond Once
	A single response is sent to each individual sender of emails.
	Respond again after a period
	A single response is sent to each individual sender unless another message comes from the same sender after the number of days specified in the next field.
Respond again after (Days)	Specify the number of days after which additional responses will be sent (only valid for the "Respond again after a period" option.
From	Specify a "from" address or name for your response email.

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Subject	Specify a subject for your response message email.
	NOTE that you can use server variables here. E.g. Re: %%subject%% – the original sender will obtain response email with Re: + his/her subject.
Message text	Specify some text to be used as the body of your response email

In the example screenshot above a response will be sent from **bruce@icewarp.com**, with a subject of **Away on Holiday** and the text shown as the body of the message. This message will be sent once in response to each individual sender, but if that sender sends another message more than 7 days after the first he will get the response again.

Forwarder Options

IceWarp Options	
Responder Forwarder	Rules
Forwarder Forward to:	boss@icewarp.com
🔽 Leave a copy	
	<u> </u>

Field	Description	
Forward to	ward to Specify an address to have emails forwarded to.	
Leave a copy	Check this option to have a copy of the message left in your inbox.	

Rules

IceWarp Options			×
Responder Forwarder R	ules		
Title			
☑ 🛿 spam ☑ 🖋 sms			
AddEdit	Delete 🕇 \downarrow		
		<u>0</u> K	<u>C</u> ancel

On this tab, you can define rules for incoming messages. Clicking the **Add** or **Edit** button reveals the **Rules** dialog.

For detailed information, refer to the Rules chapter.

23

FreeBusy Appointment / Event Arrangement

This section describes how to publish your Free/Busy information, allowing yourself and others to schedule meetings with multiple attendees without causing scheduling clashes.

Setting the FreeBusy feature for Advanced Appointment / Event Arrangement

- 1. To be able to retrieve, view and use other people's free/busy information, first you have to enable the feature in Microsoft Outlook and fill in the correct location on the server.
- On the Tools menu, click the *Options* item and on the Preferences tab, click the Calendar Options button. See the screenshots below.

Options			? ×
Preference	es Mail Setup Mail Form	at Spelling Security	/ Other
E-mail	Change the appearance	of messages and the v	vay they are handled.
Calendar		Junk E-mail	E-mail Options
	Customize the appearance		
Tasks -	Default reminder:	15 minutes 💌	Calendar Options
	Change the appearance	of tasks.	
Contacts	Reminder time:	08:00	Task Options
8=	Change default settings f		
Notes -		Contact Options	Journal Options
	Change the appearance	of notes.	Naka Onlines
			Note Options
		ок с	Cancel Apply

Calendar Options
Calendar work week
🔚 🔽 Sun 🗹 Mon 🔽 Tue 🔽 Wed 🔽 Thu 🔽 Fri 🔽 Sat
First day of week: Sunday 💽 Start time: 09:00 💌
First week of year: Starts on Jan 1 💌 End time: 18:30 💌
Calendar options
Show week numbers in the Date Navigator
Allow attendees to propose new times for meetings you organize
Use this response when you propose new meeting times: Tentative
Background color: Planner Options Add Holidays
Use selected background color on all calendars
Advanced options
Finable alternate calendar: English 🔽 Gregorian 🗹 Options
When sending meeting requests over the Internet, use iCalendar format
Free/Busy Options Resource Scheduling Time Zone
OK Cancel

3. Click the Free/Busy Options button.

The only option you need to change here is **Search location**. You need to enter the location of your IceWarp Server in the form:

http://hostname:[port]/freebusy/?%NAME%@%SERVER%

The hostname is your webserver and the port is the port that your webserver is set to listen on (default is 32000). The variables %**NAME**% and %SERVER% will be evaluated to the correct email address for your account.

Example - http://www.icewarpdemo.com:32000/freebusy/?%NAME%@%SERVER% - see below:

25

Free/Bus	y Options
Options	·
\bigcirc	Free/busy information is used by people sending meeting requests, to determine when you are available for meetings.
_	Publish 2 month(s) of Calendar free/busy information on the server
	Update free/busy information on the server every 15 minutes
Internet	Free/Busy
	Publish at my location:
	Search location: http://www.icewarpdemo.com:32000/freebusy/?%NAME%@%SERVER%
	OK Cancel

- 4. Do not check the **Publish at my location** box as the IceWarp Outlook Connector 4 will handle this automatically.
- 5. Click **OK** three times to close all dialog boxes.

How to plan a meeting using FreeBusy

Return to the main screen in Outlook. For planning a meeting, there is nothing really to set manually. Outlook **autodetects the free/busy information** for the people that you invite, and it **automatically inserts their free/busy time periods in the planner**.

- 1. Once in the main screen, click **Calendar**, and then click **New Meeting Request** on the **Actions** menu (or CTRL+SHIFT+Q)
- 2. On the second **Scheduling** tab, type the name of each attendee in the **All Attendees** box.
- 3. Outlook will retrieve the free/busy information and display it in the planner, so you see the time periods immediately.

Rules

This dialog is the same for all accounts and domains.

Rules	×
Title	
🗹 👉 Any message header contains "spammer@somedomain.com"	
▼√ "From: contains MyFriend@example.com"	
☑ 😒 IP / Sender "192.168.0.9"	
Add Edit Delete 🕇 👢	OK Cancel

Selecting **Mail Service -> Rules** or the **Rules** tab with a Domain or User selected will give you access to the Rules list, allowing you to perform maintenance on the rules.

NOTE that the above graphic may be incorrect depending upon where you are accessing a Rules tab.

Also be aware that Rules are only processed against incoming messages.

The filter is a text file with a strictly defined format. The file can be edited directly using a standard text file editor but we **highly** recommend that you use the **Add**, **Edit** and **Delete** buttons as even the simplest mistake can cause valid emails to be rejected.

Multiple rules can be selected for deletion by holding the Ctrl key and clicking multiple rules.

A range of rules can be selected by clicking the first rule and then clicking the second rule while holding down the Shift key.

Rules can be activated and de-activated by checking/un-checking the box to the left of the rule. This is useful for testing purposes or to disable a rule for a time without deleting it.

Clicking on the Add or Edit button will open a dialog like this, which allows you to define or modify your rule:

Rule	×
Conditions:	
Where From: message header matches some words Where To: message header matches some words Where Subject: message header matches some words Where Cc: message header matches some words Where Reply-To: message header matches some words Where Date: message header matches some words Where Message priority is value	
Actions:	
 Accept/Reject/Delete/Spam message Stop processing more rules Forward to email address Move to folder Copy to folder Encrypt message Send message 	
Description:	5
Reject message and Stop processing more rules	
Title:	
	j

The various options, and the **String conditions** dialog, are discussed in detail in the following table but first we will explain basic use of the three sections of the dialog:

The Conditions block

In this area you can select the properties of the message that you wish to perform some test on.

- Multiple conditions can be tested by checking multiple boxes.
- The same condition can be added multiple times by double clicking the Condition when it is checked.

The Actions block

In this area you select the Action(s) that you want to perform on the message if the Rule evaluates as True

Multiple actions can be selected by checking multiple boxes.

The Logic Buttons

The buttons below the Actions block are used to add logic to the rule

The Exclamation mark will negate (NOT) the Condition you are currently modifying.

- The up and down arrows will move the conditions up and down within the rule.
- The X button will delete the current Condition.

We recommend experimentation with these buttons to familiarize yourself with their function

The Description block

This will show the rule you are building or modifying and will change dynamically as you select or de-select Conditions and Actions.

Areas of the rules that can be modified are highlighted in this block and clicking on them will open a further dialog box to allow you to define your test.

Title

The name of the rule, for identification purposes.

Condition	Description	
Where From: message header matches some words	Check the From: header for a string Condition. In the rule description click on some words to create the string condition (explained below).	
Where To: message header matches some words	Check the To: header for a string Condition. In the rule description click on some words to create the string condition (explained below).	
Where Subject: message header matches some words	Check the Subject: header for a string Condition. In the rule description click on some words to create the string condition (explained below).	
Where Cc: message header matches some words	Check the Cc: header for a string Condition. In the rule description click on some words to create the string condition (explained below).	
Where Reply-To: message header matches some words	Check the Reply-To: header for a string Condition. In the rule description click on some words to create the string condition (explained below).	
Where Date: message header matches some words	Check the Date: header for a string Condition. In the rule description click on some words to create the string condition (explained below).	
Where Message priority is value	Check the priority of a message. Click on Normal in the Rule description to select a priority.	
Where Message is spam	Check if the message has been marked as spam.	
Where Message is size	Check the Message size. Click the 0 kB to select the message size criteria. Select Greater or Lower and specify a Size (in kB)	
Where Message body matches some words	Check the message body for a string condition. In the rule description click on some words to create the string condition (explained below).	
	NOTE - Use this option with care as scanning the whole message body of every incoming message could seriously affect your Server performance.	

Where Custom message header matches some	Check a Custom message Header for a string condition.	
words	In the rule description click on some words to create the string condition (explained below).	
	NOTE - this rule has an unusual format for the string condition!	
	format - <header>:<string condition=""></string></header>	
	where	
	<header> is the name of your custom header</header>	
	<string condition=""> is the string condition to test for.</string>	
	Example	
	MyHeader:jim;bob;john	
	Would check the header "MyHeader" for any of the strings "jim", "bob" or "john".	
Where Any message header matches some words	Check all headers for a string condition. In the rule description click on some words to create the string condition (explained below).	
Where Attachment name matches some words	Check the Attachment name for a string condition. In the rule description click on some words to create the string condition (explained below).	
Where message contains attachment	Check whether the message has an attachment.	
Where Sender matches some words	Check the Sender for a string condition. In the rule description click on some words to create the string condition (explained below).	
Where Recipient matches some words	Check the Recipient for a string condition. In the rule description click on some words to create the string condition (explained below).	
Where Sender/Recipient is local/remote	Check the location of the sender or recipient. In the rule description click on local/remote to open the following dialog: Sender / Recipient Sender / Recipient Ignore Account does not exist Member of: Image: Ima	

	In the second evicts / Account does not evict	
	Ignore / Account exists / Account does not exist	
	select whether you want to check whether the account exists, doesn't exist, or ignore this check.	
	Only available for Local accounts	
	Member of:	
	Check whether the account belongs to a particular Domain, Group, Mailing List etc Press the '' button to open the standard Select Item dialog.	
	Only available for local accounts that you check the existence or non-existence of	
Where Sender's IP address matches some words	Check the Remote IP address for a string condition. In the rule description click on some words to create the string condition (explained below).	
Where rDNS (PTR) matches some words	Check the rDNS (PTR) record for a string condition. In the rule description click on some words to create the string condition (explained below).	
Where Sender's IP address is trusted	Check if the Senders IP address is in the trusted list	
Where Spam score is value	Click on 0.0 in the Rule description to define a greater than or less than value to check the spam score against.	
Where SMTP AUTH	Check if this message was delivered using an SMTP Authorized connection	
Where Local time meets criteria	Click the criteria link to define time in the Time Criteria dialog. Select Week days and/or hours and/or dates to set criteria for processing messages.	
	Time Criteria ▲ ✓ Weekdays: Su ✓ Mo ✓ Tu ✓ We ✓ Th ✓ Fr Sa ✓ Between times (hh:mm): 09:00 Between dates (yyyy/mm/dd): <u>OK</u> Cancel	
All messages	A special condition that evaluates TRUE for all messages - use with care!	
String Testing	Description	
	Clicking on some words (in a new condition) or the string itself (in a condition already defined) will open the String Condition dialog box.	
	There are four options available in the dialog:	
	The Function drop-down box offers 7 options for the string test, the option chosen effects the content required in the String text-box	
Contains list of strings (semi-colon separated)	Populate the String box with a list of strings to test for	
Regex	Populate the String box with a regular expression. There is a basic Regex tutorial here	
Starts with string	Looks for the string specified in the String box at the start of the tested condition	

Ends with string	Looks for the string specified in the String box at the end of the tested condition
Is string	Tests whether the tested condition is exactly equal to the string specified in the String box
Contains list of strings from file	The String box should contain the path to a text file containing a list of strings you wish to test for. Press the "" button to open a file dialog to navigate to a file where you can specify strings, one per line.
NOT	Check this box to use negation of the selected string test. E.g. select the Any message header matches some words condition, select the Contains list of strings option, write IceWarp into the String field and tick this box. All emails with headers without the defined word (IceWarp here) will undergo the defined action (see further).
Match case	Check this box to take string case into account.
Match whole word only	Check this box to perform a standard "whole word" check against the string.
Actions	Description
	The following Actions are available when a Condition is evaluated TRUE.
	Multiple Actions can be selected by checking multiple boxes.
	Selecting an Action will add the Action to the Description box and for some Actions you are able to click the text in the description to define the Action further. Details follow:
Accept/Reject/Delete/S	Adds an Action to Reject (default) the message.
pam/ Quarantine	Click on Reject in the Description area to select Reject, Accept, Delete, or mark the message as Spam.
Stop processing more rules	Stop any further Rules from being processed, if this Rule is evaluated as TRUE.
Forward to email address	Forward the message to an email address.
	Click email address in the Description area to specify the email address.
	NOTE - that you can also send an instant message or an sms using this option:
	sms - use sms: <number> e.g. sms:0123456789</number>
	IM - use xmpp: <jabberid> e.g. bruce@icewarpdemo.com</jabberid>
Move to folder	Move the message to a folder.
	Click on folder in the Description area to select the folder to move to.
	NOTE - The folder tree does not fill when you access this Action within Content Filters, you have to manually specify a mailbox.
	ALSO - although the INBOX folder may be shown in the folder tree, there is little point selecting this folder as this is the default folder that messages will come in to.
	ALSO - that you can have email delivered to a specific mailbox folder by specifying %%Extension%% as the folder name. When this is specified IceWarp Server will look for a folder name within the email address and store the message to that folder if it exists.
	Example:
	A message sent to john:%%important%%@icewarpdemo.com will be stored in the folder

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	important
	Note the colon used to separate the User alias from the folder name, this can be changed to another character using the API.
Copy to Folder	Copy the message to a folder.
	Click on folder in the Description area to select the folder to copy to.
	NOTE - The folder tree does not fill when you access this Action within Content Filters, you have to manually specify a mailbox.
	ALSO - although the INBOX folder may be shown in the folder tree, there is little point selecting this folder as this is the default folder that messages will come in to.
	ALSO - that you can have email delivered to a specific mailbox folder by specifying %%Extension%% as the folder name. When this is specified IceWarp Server will look for a folder name within the email address and store the message to that folder if it exists.
	Example:
	A message sent to john:%%important%%@icewarpdemo.com will be stored in the folder important
	Note the colon used to separate the User alias from the folder name, this can be changed to another character using the API.
Encrypt message	Check this option to have the message encrypted.
	NOTE -that for this option to work there must be a copy of the User's public certificate located in a file called cert.pem in the User's mailbox folder. The message will be encrypted using this certificate and then can only be decrypted by the user using his private key in his email client.
Send message	Send a message.
	Click message in the Description area to open a dialog to define the message.
	You can define To, From and Subject fields, the Text of the message (or a file to retrieve the text from), the type of message (text, HTML, or message with attachment) and whether the message is email, an instant message, or both.
Edit message header	Select this option to Add, Edit or Delete a message header. Click on header to open the Edit Message Headers dialog.

	Edit Message Headers
	Action Header
	Add / Edit From: [URGENT] %%from%%
	Delete Headername:
	Action: Delete Header: Headername: Add Edit Delete QK Cancel
	Click Add to add a new rule.
	Select an already defined rule and Click Edit or Delete to modify or remove a rule.
	In the Action drop-down you should select whether this rule will Add/Edit a header or Delete a Header.
	In the Header field you should specify the header you are actioning - remember that a header name should always finish with a colon.
	You can also add your own named headers e.g. MyHeader:
	The first rule shown in the screenshot above modifies the From header - it adds the string "[URGENT]" to the start of the header. Note the use of the IceWarp Server system variable %%from%% here, which is the value of the original From header. Any system variable can be used.
	The second rule simply deletes the From header.
Set message priority to value	Select this option to have the priority of the message changed. Click on Normal to select the new priority to be assigned.
Set message flag	Select this option to set a message flag. Click on flags to set the flag(s) you wish.

Reporting Problems

When reporting problems, please include the following information:

Microsoft Windows version number and patch level

Right click the *My Computer* icon on the Desktop and select *Properties*. The Windows version and patch level will be listed under **System**: in the **General** tab dialog.

Microsoft Outlook version and patch level

Right click the *Help* in Outlook and select *About Microsoft Outlook*. The Outlook version and patch level will be listed.

The full version number of the Outlook Connector

In Outlook, select **Inbox** from the Folder List then click **About** in the Connector toolbar. The Connector version and build number (3.1-xxxx) will be listed.