



insight **Server** 4.1

User Preference Setup and Configuration Guide

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Revision date: 8/6/04



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Introduction

Insight Server not only enables administrators to modify the mail server through the web-based console, but also allows users to create and save customized preferences and settings. This chapter describes the various options that are available to a standard user.

Users may gain access to the Insight Server simply by entering the URL to their email server. This information will be provided by the network / email administrator.

The URL for the Insight Server is typically <http://mail.youremailserver.com>

The secure page URL is generally <https://youremailserver/groueware/>

User Preferences and Configuration

After the user is logged in to Administrator Web Interface using a valid user ID and password, the Welcome screen appears. To the left is a menu bar listing five categories: Preferences, Aliases, Mail Filters, Mail Folders, and WebClient. A discussion of each category and related functions are presented below.

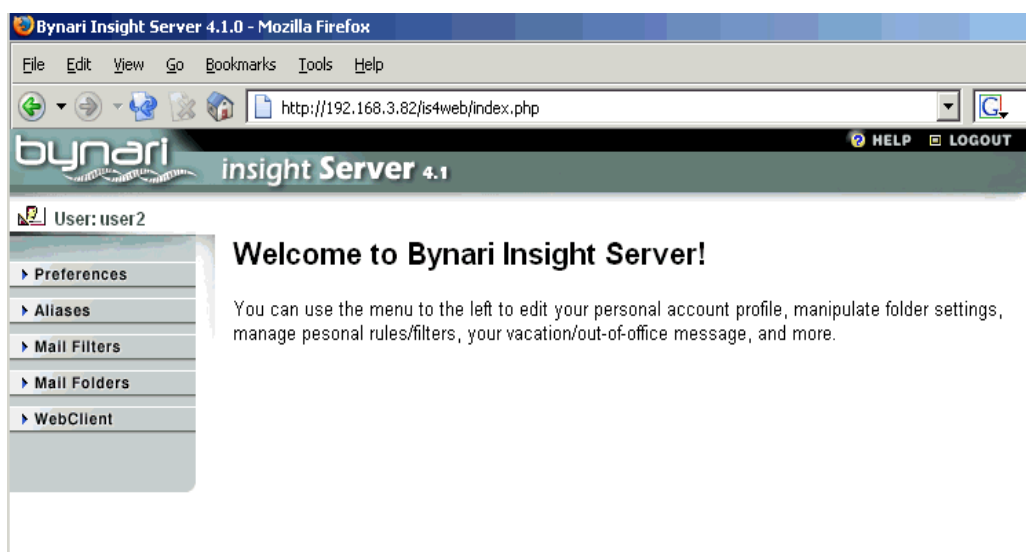


Figure 1 - Welcome Screen

Preferences

There are three sub-categories listed under “Preferences”, each of which is discussed in the following sections.



Edit My Profile

This menu option allows for changes to the user's information that will be displayed in the LDAP directory (Global Address Listing.) The following information may be changed:

General

- Password
- First Name
- Middle Initial
- Last Name
- E-Mail Address
- E-Mail Forwarding Address

Contact and Business

Miscellaneous

- Labeled URI
- Preferred Language
- User SMIME Certificate
- User PKCS12
- Destination Indicator
- Telex Number
- Description

The following information cannot be changed by the user:

- Login/Username
- Mail Alias

Out-of-Office

The "Out-of-Office" feature allows for a customized, automatically generated vacation/out of office message in response to all incoming e-mails. The user can still send and receive emails.

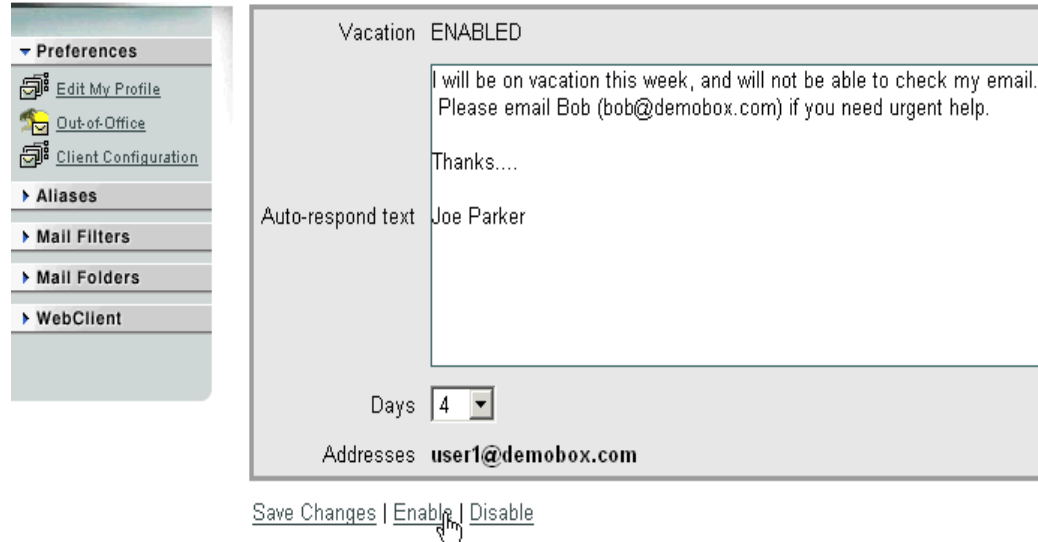


Figure 2 - Out-of-Office Message

An “Out-of-Office” message can be customized to be generated for a specified number of days and can be modified at any time by simply editing the existing message and selecting “Save Changes”. To disable a message, simply access this sub menu screen and select “Disable.”

Client Configuration

The “Client Configuration” menu assists the user in the implementation of Insight Connector in Outlook by downloading and installing the Insight Connector product (if one has been uploaded by the administrator). Figure 3 shows the options. This option allows the users to automatically create a new Outlook profile and configure it correctly using the pre-configured settings listed on Figure 4. The automated client configuration options are intended for Outlook and Outlook Express. The Insight Connector is only configured for Outlook. The Outlook Express client configuration will set up a new IMAP Outlook Express Account.

Note: In order for the Outlook/Insight Connector automatic configuration feature to work, the administrator needs to upload "connector_setup.exe" (Unzip the Insight Connector zip file, and rename the attached ".exe" file to "connector_setup.exe") to Insight Server into this directory: /opt/insight/var/ftp

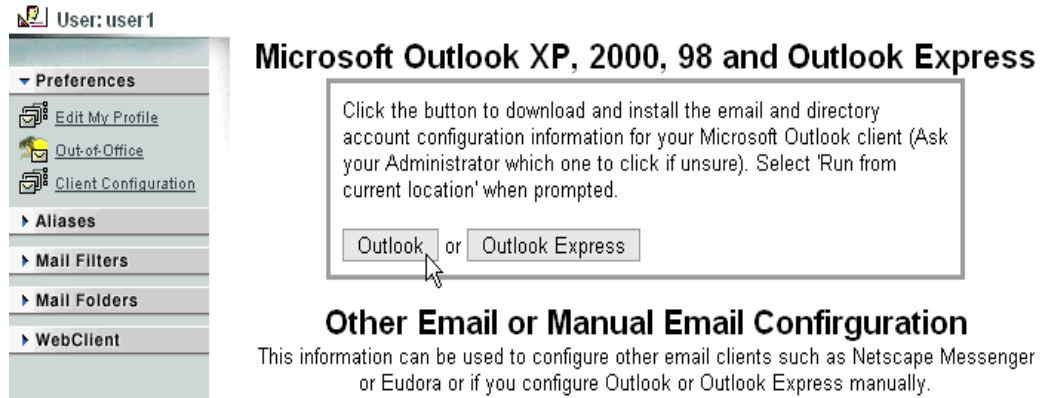


Figure 3 - Client Configuration

Email Account

| | |
|-------------------------------|--------------------------------|
| Mail Account: | Internet Email |
| Name: | user 1 |
| Email Address: | user1@demobox.com |
| Server Type: | IMAP or POP |
| Incoming Email (POP or IMAP): | test.bynari.net |
| Outgoing Mail (SMTP): | test.bynari.net |
| Login: | user1 |
| Password: | Use your mail account password |

Figure 4 - Client Configuration

Below are the steps to run the Outlook Client Configuration tool:

1. Under “Preferences”, select “Client Configuration”, then click on “Outlook” to set up Insight Connector, or select “Outlook Express” to setup an Outlook Express IMAP account.
2. From the following screen, select “Download” and run/open the file from its current location or download it to the desktop.
3. If you selected to download the file, double-click the file to start the script. If you chose to run it from the current location, the wizard will start automatically.

Note: If for some reason the script gives an error upon running it, please verify that the local workstations have the mail server hostname in the “hosts” file. For instance, in Windows XP, the hosts file is typically located in C:\WINDOWS\system32\drivers\etc\

4. Insight Connector now gets installed and pre-configured “silently”. In Outlook 98-2000, the Outlook profile gets created and configured automatically.

Note: Outlook 2002-2003 users: Using the client-configuration feature does not automatically create the Outlook POP3/IMAP profile. After running the script, when opening Outlook, the user will have to go thru the Outlook wizard to setup a new Profile. Please see the Insight Connector manual for details.

Aliases

Under this menu option, an email address can be mapped to a single or multiple user-accounts. For example, if john@demobox.com and bill@demobox.com subscribe to the “salespeople” alias, both will receive a copy of every email addressed to salespeople@demobox.com. Insight Server allows users to choose what aliases they wish to be copied on (if the administrator enabled this option). There are 4 subcategories under “Aliases”, each one is discussed below.

View Aliases

This option displays all available aliases on the mail server, per domain (Figure 5). To subscribe to an alias, simply click on the alias itself, and select “Join” (Figure 6).

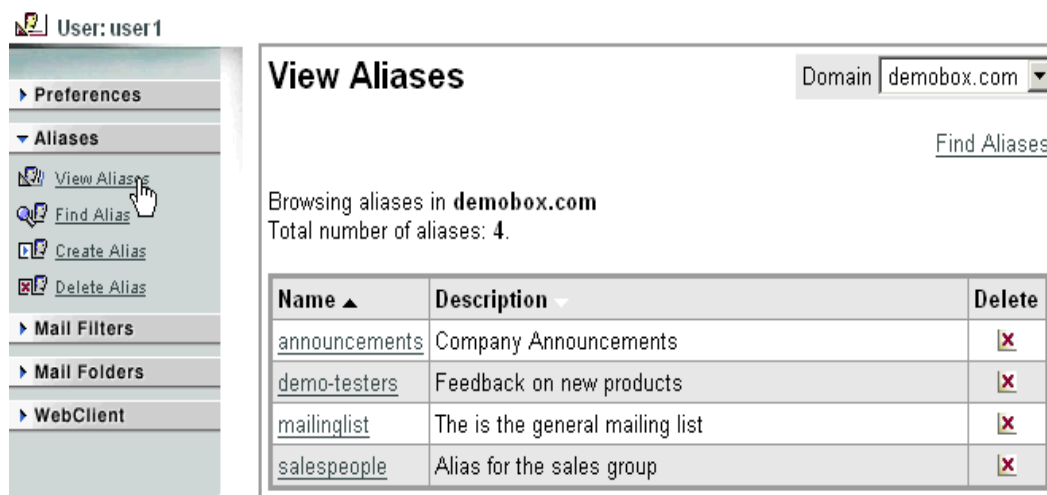


Figure 5 - View Aliases

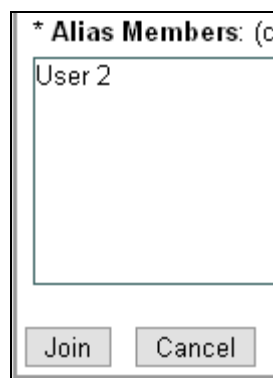


Figure 6 - Join Alias

Note: If the system administrator has restricted membership, users cannot subscribe themselves to an alias. Please contact your administrator for more information.

Find Aliases

This option allows the user to search for all available aliases. To search, simply complete the search string, and select “Search”, as shown below.

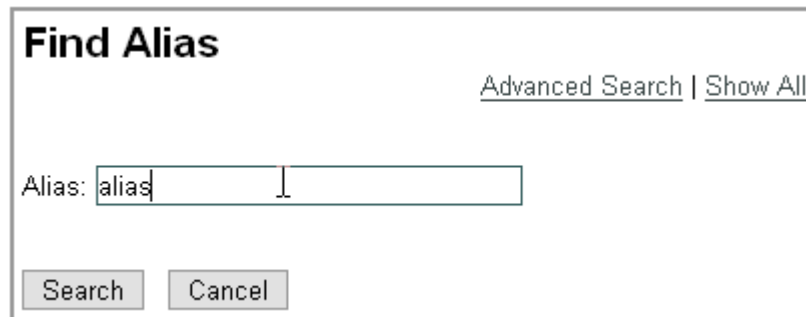


Figure 7 - Find Alias

Create Aliases

This menu option allows the user to create a unique alias. Simply complete the required fields (marked with an asterisk *), select the membership level:

- Open - Any user can subscribe
- Restricted - No user can subscribe; only the alias creator can add users

Once all required information is entered, click “Create” to create the alias.

Note: If the system administrator has not enabled this feature, users will not be able to create aliases.

Create Alias

Domain demobox.com ▾

* - Indicates a required field

* **Alias:** @demobox.com

Description:

Membership: Open Restricted

* **Alias Owners:** (common names separated by commas) [[Browse](#)]

* **Alias Members:** (common names separated by commas) [[Browse](#)]

Figure 8 - Create Alias

Delete Aliases

To delete an alias, simply enter the name of the alias to be deleted, or select “Show All” for a listing of all aliases, and then select the “X” icon to the right of the alias. An alias can only be deleted by its own creator. A user cannot delete aliases that were created by an administrator, manager, or another user.

Delete Alias

Alias: **test alias**

Confirm alias deletion -- cannot undo!
Are you sure you want to delete this alias?

Figure 9 - Delete Alias

Mail Filters

Mail Filters are server-side rules. These rules can be used for various reasons, including filtering spam, moving incoming messages to specific folders, or blocking incoming emails from certain users or domains. There are two subcategories under “Mail Filters”, each one is discussed below.

View All Filters

All created rules will be displayed using this feature. The user has the option to enable, disable, or delete a rule.

UPDATED



Figure 10 - User Rule created on Server.

Create New Filter

New rules and filters can be created using this menu option.

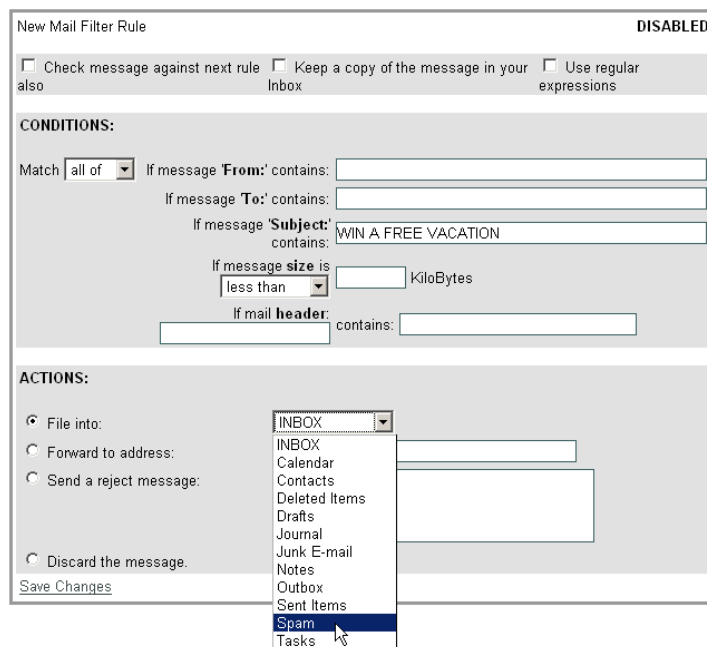


Figure 11 - Create a Filter

As illustrated on Figure 11, there is a number of different filters that can be created. Included below are a few examples.

Filter against SPAM

Insight Server comes pre-installed with an open source anti-spam product called SpamAssassin (www.spamassassin.org for more information on Spamassassin) to help users easily filter unwanted spam emails. Here are some quick steps to filter spam:

1. Under “CONDITIONS” > “If mail header:” type in: **X-Spam-Flag** and in “contains:” type in: **YES**
2. Under “ACTIONS” > “File Into”, select a folder to where spam emails should be moved (for example, the “Deleted Items” or “Spam” folder.)

Move incoming email to a folder

The option enables the user to automatically filter incoming email so that certain emails are moved into a specific folder. To utilize this feature:

1. Under “CONDITIONS” > “If message ‘From:’ contains”: **type in the email address of the person from whom an email should be filtered.** (For example, bill@company2.com)
2. Under “ACTIONS” > “File Into”, select a folder into where filtered emails should be moved. (For example, the “Clients” or “Important” folder.)

There are many different variations of filters/rules that can be easily created according to the user’s personal preferences.

Mail Folders

Users can view or create new folders that will appear on the server. All available folders will be displayed here. There are two subcategories under “Mail Folders”:

View My Folders

Users can view or create new folders that will appear in Outlook on the server. When viewing folders, all the folders listed are those accessible by the user.



Figure 12 - Folder Listing

Reconstruct all mail folders

This option is mainly used in case of a folder or mailbox corruption. Using this option enables an update of the Cyrus mail store for the active user. Once reconstruction is complete, the following screen will be displayed:

Reconstructing the following folders

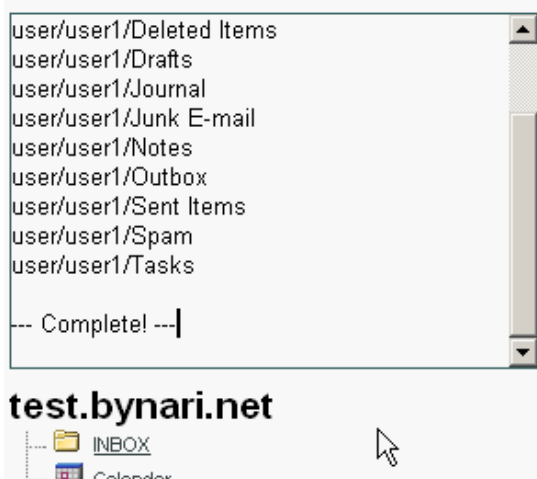


Figure 13 - Reconstruct Folders

Note: Most users will probably not have the need for this feature. However, should it be utilized, there are no negative effects of using this option, and the process is automatic.

Edit or share a folder

To share a folder, simply select the folder to be shared with other users. The “Folder Property editing screen appears (Figure 14), where another user can be selected to give them access to the folder. From the list, select the person/user-id, select the rights to be provided to that user, and select “Add ACL”.

Recommended rights:

- Guests: “Lookup” and “Read” rights.
- Power User: All rights, except for “Administrator”
- Administrator: Full rights

Existing user rights can be modified or deleted from this menu option, as illustrated on Figure 14.

Editing folder: Calendar

Folder name

Type

| Folder name | User name | lookup | read | seen | write | insert | post | create | delete | admin | | |
|-------------|-----------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------------------------------|---------------------------------------|
| Calendar | user1 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="button" value="Modify"/> | <input type="button" value="Delete"/> |
| Calendar | manager | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="button" value="Modify"/> | <input type="button" value="Delete"/> |

Anyone

User 1 (user1)

User 2 (user2)

manager (manager)

lookup read seen

write insert post

create delete admin

Figure 14 - Folder Editing

Create Folder

This menu option allows the user to create new folders directly on the server. Step-by-step directions are provided below.

Create a folder

Name

Where

Type

Appointment

Contact

Journal

Mail

Note

Task

Figure 15 - Folder Creation

1. In the "Name" field, type in the new folder name.
2. Select the new folder's location (i.e., top folder level or as a sub folder of an existing folder). Note that "Top Level" is selected as the default setting.
3. Select the folder type. (Mail, Calendar [Appointment], Contact, Journal, Note, or Task.)
4. Select "Create" to finish the folder creation.
5. If this folder should not be shared, return to "My Folders" and set the appropriate preferences.

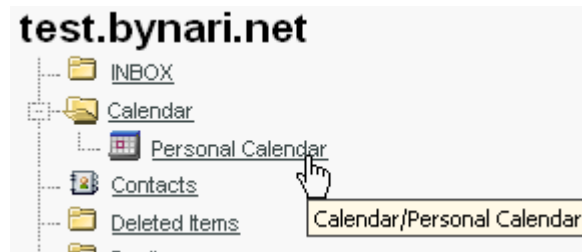


Figure 16 - Newly Created Folder

WebClient

“Run WebClient” is the only option available in this sub menu, which will launch Insight WebClient, the Bynari groupware, web-based email client.

Note: If you cannot log in from the WebClient interface, please contact your system administrator.