IPSWITCH
IMail Server™

IMail Client Help

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CHAPTER 1   Introduction to IMail Web Client

Action Menu

Compose New Message

CHAPTER 4   Managing Mail

CHAPTER 5   Address Books

CHAPTER 6   Calendars

CHAPTER 7   Tasks

CHAPTER 8   Notes

CHAPTER 9   RSS Feeds

CHAPTER 10   Websites

Index

Introduction to IMail Web Client

In This Chapter

About Ipswitch Web Messaging Help

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IMail Web Messaging Help

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Welcome to the New IMail Web Client

IMail Web Client

Ipswitch Web Client lets you send and receive mail using a Web browser. You can log on to the IMail Web Client from any computer with a supported browser, and manage your email without installing email client software. IMail Web Client uses direct access to manage mail on the server, which allows all mail folders and messages to reside on the server.

IMail Web Client is an integrated Web-based collaboration client. This client replaces the current Web Messaging Client and WebMail templates. If you used contacts or contact lists (distribution lists) in a previous version of Ipswitch Web Messaging or in Microsoft Outlook with the IMail Collaboration plug-in, the contacts and contact lists are automatically imported into the new IMail Web Client as a newly created Contacts folder.

Client User Interface

A new web based client allows user-friendly access to critical email functions: Inbox, mail folders, composing, personal user settings, calendaring, inbound rules, public folders, contact management, notes, tasks, RSS Feeds, Websites and the ability to switch between the client and the administrator pages if you have Administrator privileges.

IMail Web Client supports:

- Microsoft® Internet Explorer 8.0 or later
- Mozilla Firefox v5.0 or later
- Safari 2.0.4 and later for Macintosh, or, the upgraded version of Safari installed with Mac OS X version 10.4.8
- Google Chrome

Web Client browser requires:

- Enabled Javascript support in the Web browser
- Enabled Cookie support in the Web browser
- Enabled pop-ups for Calendar reminders

IMail Web Client directly accesses the server to manage mail on the server, and does not require IMAP services to be running. When a user creates a mailbox in IMail Web Client, the mailbox is created on the mail server and mail folders and messages reside on the server.

You can access the IMail Web Client login page by entering the IMail Server address in the browser address field.

Important. You may need to change network firewall settings to make a specified port available for IMail Web Client access.

Related Topics

Browser Help (on page 4)

Browser Help

If you are having trouble accessing the IMail Web Client web interface, please look over the information below to troubleshoot.

Enable JavaScript

If after attempting to login to the Web Client web interface you receive this error message:

"Your request could not be served because you have JavaScript disabled. Please enable JavaScript in your browser's settings, close your current web session and try again."

Enable Javascript for Windows Internet Explorer:
1   Open Internet Explorer.
2   Select **Tools > Internet Options**.
3   Select the **Security** tab.
4   Click the **Custom level** button.
5   In the settings box, scroll down to the section on scripting
6   In the Active scripting section, select **Enable**.
7   Click **OK** to save changes.

Enable JavaScript for Mozilla Firefox:
1   Open Firefox.
2   Select **Tools > Options**.
3   Select the **Content** tab.
4   Select **Enable JavaScript**.
5   Click **OK** to save changes.

Enable JavaScript for Google Chrome:
1   Open Chrome.
2   Select **Options > Under The Hood.**
3   Click **Content Settings** button.
4   Locate **Javascript** on the page and select **Allow all sites to run JavaScript**.
5   Click **"X"** to exit and save changes.

Enable cookies

If after attempting to login to the Web Client web interface you receive this error message:

```
"Your request could not be served because you have browser cookies disabled.
Please enable cookies in your browser's settings, close your current web
session and try again."
```

Enable cookies for Windows Internet Explorer:
1   Open Internet Explorer.
2   Select **Tools > Internet Options**.
3   Select the **Privacy** tab.
4   Select **Advanced**.
5   Select **Override automatic cookie handling**.
6   Click **OK** to save changes.

Enable cookies for Mozilla Firefox:
1   Open Firefox.
2   Select **Tools > Options**.
3   Select the **Privacy** tab.
4   Select the **Cookies** tab.
5   Select **Allow sites to set cookies**.
6   Click **OK** to save changes.

Enable cookies for Google Chrome:
1   Open Chrome.
2   Select **Options > Under The Hood.**
3   Click **Content Settings** button.
4   Locate **Cookies** on the page and select **Allow local data to be set**.
5   Click **"X"** to exit and save changes.

Accessing the IMail Web Client

To launch the Web client:

In your browser address box, enter the URL or IP Address of the IMail Web Server followed by the IMail Web Client path as instructed by your IMail System Administrator.

Example:

`"http://123.100.100.80/IClient"` or `"http://mail.domain.name/IClient"`, then press **Enter.** The Web Client login page appears.

- **Email Address** and **Password**. Enter your email address and password to login to your Ipswitch Web Messaging Client.

Related Topic

Logging into IMail Web Client on page 9

Using the IMail Client Main Page

The **IMail Web Client** main page initially displays a Today tab configurable by your IMail Administrator. Selecting an item in the folder tree will open a new tab and display your Email, Calendars, Contacts, Notes, Tasks, RSS Feeds and Websites.

The IMail Web Client has a multitude of user options to allow the user more user flexibility and control of their mail. Go to **Action > Manage User Options** (on page 26) to begin customizing your new web client to suit your needs.

Tabs

Today tab. Initial default tab. Displays a space utilization chart if disk space limits have been configured. Selecting new items from the Navigation Folder Tree will generate new tabs allowing capability to return to a previous page without reloading data again.

> **Note:** By default, the maximum new tabs allowed to be open in one session is 10. This setting is only configurable by your IMail Administrator.

Menu Options

Action. Click to select one of the following:

- *Compose New Message* (on page 35). (Alternate location for Compose button). Click this link to open a new tab and begin a new mail message.

> **Note:** The **Compose New Message Link** is configurable to appear within your Action drop down menu, or on the Main Menu (set by default). Go to **Action > Manager User Options > General Options** and uncheck Main Menu Bar to have Compose appear within the **Action** drop down menu.

- *Create New* (on page 15). These options are shortcuts to open a new tab for the creating the following: Contacts, Appointments, Meeting Requests, Tasks, Mail Rules, Notes, and RSS Feeds.
- *Manage Selected Folder* (on page 15). This option will allow creating a subfolder, renaming, or deleting the selected folder within the navigation panel.

- *Manage Mail Rules* (on page 18). This option will open the rules dialog panel in a new tab.

- *Manage Away Message* (on page 23). This option will open the **Away Message** dialog in a new tab for updating.

- *Manage Auto Responders* (on page 24). This option will open the **Auto Responders** dialog in a new tab.

- *Manage User Options* (on page 26). This option will open a new tap to allow modifications to **User Options**.

- *Change Password* (on page 34). This option will open the **Change Password** pop-up dialog.

- *Change Theme* (on page 34). This option gives the capability to customize the look and feel of your Web Client.

- **Switch to Lite Web Client**. Allows user to switch to the Lite Web Client without logging out and logging in again.

- **Clear Application Cache**. This option displays only for IMail System Administrators. This option clears cache for changes made to the following: iclient.config file, RSS Feeds and Websites.

Compose (on page 35).   (Set by default to appear on main page) Click to open a new tab for a new mail message.

> **Note:** Go to **Action > Manager User Options > General Options** and uncheck Main Menu Bar to have Compose moved to appear under **Action**.

Admin.   (Appears only for System Administrators, Domain Administrators and List Administrators) Click to open a new window for the Ipswitch Web Administration home page.

Help. Click to open a new window containing help for your IMail Web Client.

Log Out. Click to end your session with the IMail Web Client and return to the Web Client Login Page.

Navigation Folder Tree

> **Note:** User Options can be accessed at **Action > Manage User Options** (on page 26).

> **Note:** Inbound Rules can be accessed and managed at **Action > Manage Mail Rules** (on page 18).

- *Email Folders* (on page 38) are mailbox folders used to view all incoming and outgoing messages. The following standard mailboxes appear in the folders list, plus any mailboxes that you create:

> **Total Mailbox sizes**. Total mailbox size and total message count can be obtained by hovering your mouse of the Email which can be found directly under your User Name at the top of the navigation folder.

> **Individual Mailbox sizes**. Individual mailbox size and count can be obtained by hovering your mouse over any mailbox found within the navigation folder.

- **Inbox**. All new mail is received into this mailbox (folder) by default.
    - *Delete* (on page 38). Click to delete a selected message.
    - *Reply* (on page 39). Click to reply to a message sender.
    - *Reply All* (on page 39). Click to reply to all message recipients of a message.
    - *Forward* (on page 39). Click to forward a message to another email address.
    - *Refresh Mail* (on page 39). Click to manually check for new messages.
    - *Mail Actions* (on page 40). Action that can made to individual mail messages. Report as NOT Spam, Report as Spam, Move/Copy, Mark as Read, Mark as Unread, Search Messages and Show/Hide Filters.
- *Drafts* (on page 49). When you click **Save to Drafts**, rather than **Send** while composing a message, the message draft is saved in this folder and can be re-opened for composing, editing, and sending.
- **Sent.** All sent email messages are copied to this folder by default. This can be changed through **Action > Manage User Options (on page 26) > Composing Messages > Save a copy of the message in the Sent Folder**.
- **Deleted.** All deleted email messages are copied to this folder by default. This can be changed to "Purge" through **Action > Manage User Options (on page 26) > Deleting Messages**.
- *Address Books* (on page 52). Click to access and manage your personal, shared and public Contacts.
- *Calendars* (on page 63). Calendars will appear when enabled by your IMail Administrator. Click to access and manage your personal, shared and public Calendars.
- *Tasks* (on page 73). Click to access and manage your personal, shared and public Tasks.
- *Notes* (on page 77). Click to access and manage your personal, shared and public Notes.
- *RSS Feeds* (on page 78). Click to display your RSS Feed in a new tab, or right click to add a new RSS Feed.
- *Websites* (on page 79). Click to display websites setup and controlled by your IMail Administrator.

Logging into IMail Web Client

IMail Web Client Login Page

Enter your **Email Address** and **Password**, then click **Login**. If the login information is correct, the IMail Web Client `"Today"` page opens.

- **Email Address:** Enter the email address assigned to you from your IMail Administrator.
- **Password:** Enter the password your assigned password.

> 💡 **Tip:** Should your password not have the security strength as set by your IMail Administrator, the **Change Password** dialog will automatically appear for you to change your password. The dialog will define the password criteria as set by your IMail Administrator.

- **Language:** A list box for Languages, allows capability to read messages composed with international characters in English, Chinese Simplified, Chinese Traditional, French, German, Italian, Japanese, or Spanish. Choose the language (encoding) to send messages via the *General Options* (on page 26) tab. To access, go to **Action > Manage User Options**.
- **Use Lite Web Client:** This check box will log you into the Lite Web Client designed for users with mobile devices.   This web client has limited capability, and was not designed with all the advanced options and features that the regular web client offers. For more detail on this client read the *Web Messaging Lite Help http://docs.ipswitch.com/_Messaging/IMailServer/v12/Help/LiteClient/index.htm*.
- **Remember My Email Address:** Select this check box to remember your Email Address when used again on the same local machine.
- **Remember My Password:** Select this check box to remember your password when used again on the same local machine.
- **Automatically Login On The Next Visit**. Select this check box to bypass the login page when used again on the same local machine.

> 📝 **Note:** To uncheck this feature, click **Logout** located on the top menu to access the login dialog.
>
> 📝 **Note:** Username and encrypted password information are stored in cookies on your computer.

Problems logging in?

If you repeatedly have problems logging in, carefully re-enter your email Username and Password. If you continue to have problems accessing your mail account, contact your IMail System Administrator.

Setting Up SSL for IMail Web Client

The **IMail Web Client** uses the Microsoft Internet Information Services (IIS) Secure Sockets Layer (SSL) features to encrypt communications between your IMail Web Client and Server. Only your Network Administrator has the capability to utilize this feature.

Synchronizing Outlook using IMail Collaboration

Install **IMail Collaboration** to synchronize your Outlook Contacts, Calendar, Notes and Tasks with your Ipswitch IMail Web Client.

Check with your IMail Administrator for the following:

- IMail Collaboration availability.
- Location of the IMail Collaboration Client for download and installation.
- Verify that the correct IMail Collaboration User exists.

Once the IMail Collaboration Client has been installed and synchronized with Outlook, open your Microsoft Outlook under **Tools** > **Share** > **Settings** and be sure that Contacts, Calendar, Notes and Tasks are checked.
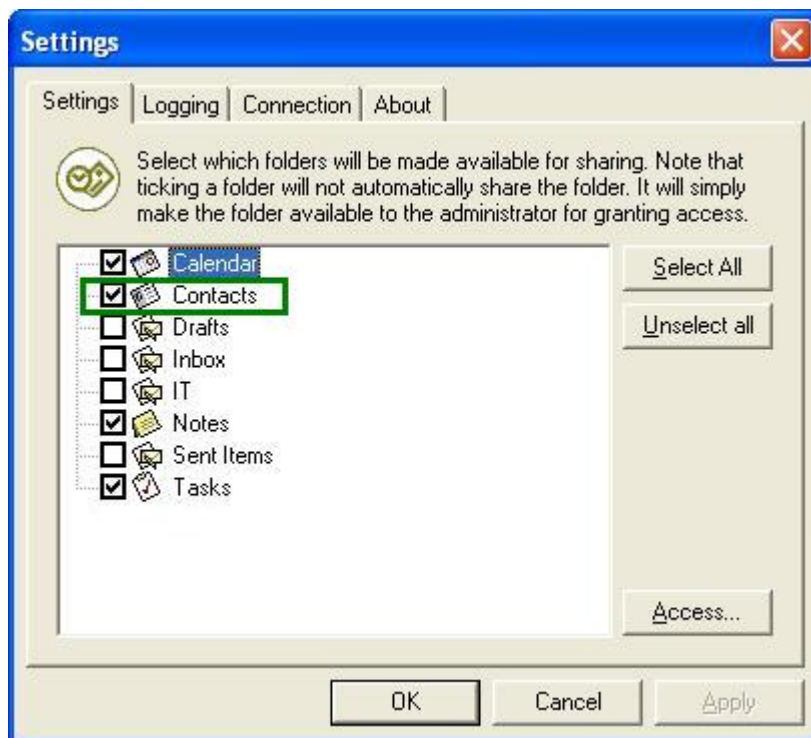
Once checked, the Contacts, Calendars, Notes and Tasks in your Outlook will automatically synchronize and update in your Ipswitch Web Client Address Books, Calendars, Notes and Tasks. Also, any new information added using your Web Client, will synchronize and update

in Outlook. For more information, see *Converting and Synchronizing Contacts and Contact Lists* (on page 62).

Related Topics

Adding a Contact (on page 53)

Public Folders and Shared Contacts (on page 13)

Mobile Synchronization Client Setup

> **Note:** See the Mobile Device Configuration White Paper for more detail information on mobile device setup.

About Mobile Device Synchronization

IMail Server now supports the synchronization of data between a user's mobile device and your IMail Server with the use of **Microsoft Exchange ActiveSync®**.

Ipswitch has created this document to assist mobile device users to configure and initiate Microsoft Exchange ActiveSync® synchronization of their mobile devices for email messages, calendar appointments, contact information and tasks.

This document will help users configure Microsoft Exchange ActiveSync® for the following devices:

- Windows Mobile® 5 and later
- iPhone™ and iPod Touch™ Software version 2.2.1 or later
- Google Android™ Incredible by HTC
- Google Android™ Droid by Motorola
- Google Android™ Droid X by Motorola

Mobile Client Requirements

Two requirements are essential for mobile device synchronization:

1. iPhone™, Windows Mobile® 5.0 and later, and Google Android™ are the devices that IMail currently supports for synchronizing data to your mobile device.
2. Data Access for synchronization by either:

- A data plan provided by your cellular provider or
- A wireless connection with internet data access

Synchronizing with Microsoft Exchange ActiveSync®

To correctly set up your mobile device to synchronize with your IMail Server, Microsoft Exchange ActiveSync® must be configured to run on your mobile device. Microsoft Exchange ActiveSync® compares the information on your device with the information on your IMail Server and updates all locations with the most recent information. Microsoft Exchange ActiveSync® will synchronize with your IMail Server information from your Email, Contacts, Calendar, Tasks and Notes through your Web Client.

Outlook Synchronization

For Outlook synchronization, the IMail Collaboration Client must be installed. Once installed Outlook will synchronize Email, Contacts, Calendar, Tasks and Notes with the IMail Server. Check with your IMail Administrator for installation procedures.

> **Note:** To synchronize your device with Outlook on your IMail Server, installation of the IMail Collaboration Client is required. See your IMail Administrator for more information.

Web Client Synchronization

Your Web Client has direct access to Email, Contacts, Calendar, Tasks and Notes, and does not require synchronization. Once the IMail Collaboration Client and Microsoft Exchange ActiveSync® are correctly configured, information updated using the Web Client will synchronize with your mobile device and Outlook.

Related Topic

Mobile Device Configuration White Paper

Public Folders and Shared User Folders

Shared and Public Folders

Public Folders are usually created and maintained by your IMail Administrator, and normally only `"Read"` access is given to a user. Public folders are created and made available to organize and share information with other users.

Public Folders will appear within your navigation tree under **Address Books, Calendars, Notes, and Tasks** and can be identified by the **[Public]** following the public folder name.
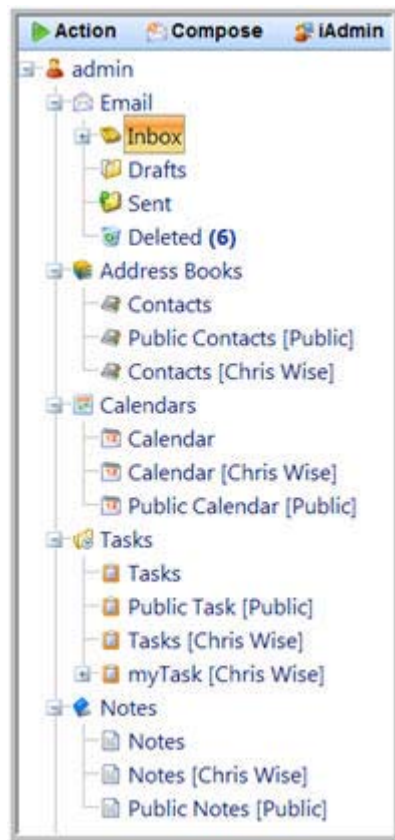
> **Note: Public Folders** require `"Read"` permissions to become available to you. Permissions for all **Public Folders** are controlled by your IMail Administrator.

Shared User Folders

Shared User Folders can be identified by the user or group name in brackets next to the folder name, as shown in diagram above. This indicates that you have been given access to a user's folder. The brackets help to distinguish between your own personal and public folders and those who are sharing their folders with you.

> **Note: Sharing User Folders** require a `"Read"` permissions to become available to you. Permissions for sharing folders is controlled by your IMail Administrator.

Related Topics

Synchronizing Outlook using IMail Collaboration (on page 10)

Permissions for Shared Folders (on page 14)

Permissions for Shared Folders

For IMail Collaboration Users Only

To receive access to a users' folder (Calendar, Contacts, Tasks or Notes) or a Public Folder (Calendar, Contacts, Tasks or Notes) your IMail Administrator must set the permissions. Once this is set, the Public Folder or users' folder should become visible under your navigation folder tree.

When you select a user folder from your navigation folder, their folder(s) (Contacts, Calendar, Notes and Tasks folders) will be displayed beneath your folders, allowing access their information.

Shared Folder Permissions

Access levels are set by System Administrator as follows:

- Read
- Read, Create
- Read, Create, Edit
- Read, Create, Edit, Delete

Example:

If you have "Read, Create" access to a calendar, this will only allow creating an appointments. If an error is made to an appointment, it would have to be edited or deleted by the owner of the calendar.

If only "Read" access is set, you cannot add a new appointment to someone's calendar.

Related Topics

Public Folders and Shared User Folders (on page 13)

Action Menu

Click **Action** to display all Menu items.

- *Create New* (on page 15)
- *Manage Selected Fold* (on page 15)
- *Manage Mail Rules* (on page 18)
- *Manage Away Message* (on page 24)
- *Manage Auto Responders* (on page 24)
- *User Options* (on page 26)
- *Change Password* (on page 34)
- *Change Theme* (on page 34)
- **Switch to Lite Web Client**. Allows user to switch to the Lite Web Client without logging out and logging in again.
- **Clear Application Cache**. This option displays only for IMail System Administrators. This option clears cache for changes made to the following: iclient.config file, RSS Feeds and Websites.

Create New

How to get here

- *Create New Contact* (on page 53). Shortcut to add a new contact.
- *Create New Appointment* (on page 65). Shortcut to create a new appointment within your calendar.
- *Create New Meeting Request* (on page 69). Shortcut to create a new meeting request.
- *Create New Task* (on page 73) . Shortcut to add a new task.
- *Create New Mail Rule* (on page 19). Shortcut to add a new mail rule
- *Create New Note* (on page 77). Shortcut to add a new note.
- *Create New RSS Feed* (on page 78). Shortcut to add a new RSS Feed.

Manage Selected Folder

- *Add New Subfolder* (on page 16)
- *Deleting a Folder* (on page 16)

- *Renaming Folder* (on page 17)
- *Emptying Folders* (on page 17)

Add New Subfolder

To add a new folder to your navigation folder list (Mail, Contacts, Calendar, Tasks, or Notes)

1   Right click the folder where you want to add a new subfolder.

2   Select **Add**. A pop-up dialog opens to name the new folder.

3   Enter the name of the folder you want to create.

-- OR --

1   Select the Folder where you want to add a new subfolder.

2   Select   **Action > Manage Selected Folder > Add Subfolder**.

3   A pop-up dialog opens to name the new folder.

4   Enter the name of the folder you want to create.

Deleting Folder

To delete a folder in the Email folder list:

> **Important:** Messages and all sub mail folders within a mail folder are permanently **Deleted** unless you have selected *Move to deleted Folder* (on page 32) in the *User Options* (on page 26). Make sure that there are no messages you want to save before you delete the folder.

1   Right click the folder you want to delete.

2   Select **Delete**.

> **Tip:** Not all mail folders can be deleted, such as Inbox and Drafts.

3   Depending on your *delete option* (on page 32) settings, a confirmation dialog will prompt "Are you sure?"

4   The folder is deleted when "OK" is clicked.

-- OR --

1   Select the Folder where you want to delete.

2   Select   **Action > Manage Selected Folder > Delete**.

3   Depending on your *delete option* (on page 32) settings, a confirmation dialog will prompt "Are you sure?"

4   The folder is deleted when "OK" is clicked.

Renaming Folder

To rename a folder in the Email folder list:

1 Right click the folder you want to rename.

2 Select **Edit**. The Enter new folder name dialog appears.

3 Enter the new folder name.

4 Click "OK" to rename the folder. Click Cancel to cancel your changes.

> **Note:** You cannot rename folders using the following names: Inbox, Sent, Deleted, and Drafts. These folder names are used by the system.

-- OR --

1 Select the Folder where you want to delete.

2 Click the   **Action** menu **> Manage Selected Folder > Edit.**

3 Enter the new folder name.

4 Click "OK" to rename the folder. Click Cancel to cancel your changes.

Emptying Folders

Depending on how your *Manage User Options* (on page 26) are set up, once you have emptied a folder, its contents are either: moved to your **Deleted** folder, purged immediately, or deleted after you receive the confirmation message (Are you sure you want to move all messages from this folder to the deleted folder?) and click **OK**.

To empty the contents of a folder:

1 Right click the folder you want to **Empty**.

2 Select **Empty**. All messages will be deleted from the selected mail folder.

Manage Mail Rules

In This Chapter

To display all existing rules click **Action Menu > Manage Mail Rules**, and a new tab will open The **Rules** page will appears in a new tab.

Rules List

- . Mouse over the pencil icon to display the rule conditions.
- **Rule Name**. Unique identifier setup when rule is first created.
- . Click this **Up Arrow** on the desired rule, to be moved to the top of the rules list.
- . Click this **Down Arrow** on the desired rule, to be moved to the bottom of the rules list.
- . Click this **Single Up Arrow** to move the selected rule up one row of the rules list.
- . Click this **Single Down Arrow** to move the selected rule down one row of the rules list.
- . Click this to remove the rule completely.

About Rules

Email delivery rules are designed to assist in managing your mail, and are based on the contents of the following fields:

- To
- From
- Sender
- Subject
- Message Header
- Message Body

Rules assist in filtering out spam and other messages that contain certain types of attachments, and can be used to direct specified mail into a specific mailbox. The IMail Web Client applies your rules as messages arrive into your INBOX.

Rules can be set up to support multiple rule conditions; rules can be used in conjunction with forwarding or the Auto Responder to reroute mail to another mail user or mailbox.

For Example:

All incoming messages with the words `"Awesome Medical Breakthrough"` can be routed to your System Administrator, or to a folder named Spam.

Although creating rules in the Web Client is straightforward, there are some complexities. Click a hyperlink below to get step-by-step instructions for your specific need.

- To display existing rules, see *Manage Mail Rules* (on page 18).
- For creating rules and conditions, see *Creating Rules* (on page 19).
- For editing and deleting rules and conditions, see *Editing Rules* (on page 20).
- For creating rules using regular expressions, see *Creating Rules Using Regular Expressions* (on page 21)

Creating Rules

For a better understanding about rules, see *About Rules* (on page 18).

To create a rule:

- From the **Action Menu** select **Manage Mail Rules**. A new tab will open The **Rules** page.
- Click **Add New Rule**. The **Add Rule** dialog appears. To edit an existing rule, see *Editing Rules* (on page 20).

STEP 1 - Enter a Rule Name

- **Enter a Name for this Rule.** This name is for your reference and is used only as a unique identifier for your reference.

STEP 2 - Add Conditions

- **Add the Rule Conditions.** Click the **Conditions Editor** button to display the **Conditions** dialog.
- **Where.** Select which part of the message the rule applies: From, Subject, Sender, To, CC, Body, or Header.
- **Comparison.**

  - **Contains.** Select this option to check the message part for the text specified in the Search text box.

  -- OR --

  - **Does NOT Contain**. Select this option to check the message part if it does NOT contain the text specified in the Search text box.

  - **Search**. Enter the message text to use for searching against the selected **Where** option. See *Creating Rules Using Regular Expressions* (on page 21).

- **Match Case**. select whether or not the case of the text entered in Search are to match or not.

- **Add Condition.** Click to add your **Condition**.

Step 2a. To **add multiple conditions**, do the following:

- **Add AND/OR.** After adding a regular condition and saving, before another condition can be added, an `"AND"` or `"OR"` must be selected before another condition can be added.

Repeat **Step 2**, and **2a** until all conditions have been created.

- **Add Condition.** Click to add your **Condition**.

- **Save**. Click to save all conditions. The first rule add dialog will display again.

STEP 3 - Set the Action

- **Set the action to take when conditions above are met.**

- **Action Type**. Set the action to take when conditions listed above are met. Options are: Move to mailbox, Forward, Delete, Copy, Bounce.

- **Target.** A required entry for certain Action Types (Move to mailbox and Forward) . Enter the name of the target mailbox, or email address that will receive messages that are selected by your rule.

- **Save**. Click this button to save your new Rule. The main rule page is displayed again.

- **Save Changes**. Click Save Changes to update the rules file.

> ⚠ **Warning:** Be sure to click **Save Changes** after all rules have been created/modified. Changes will be lost if this last save is not made.

Editing Rules

Modifications to **Rules** include changing the rule name, conditions, and actions.   To access rules go to **Action Menu > Manage Mail Rules**. A new tab will open The **Rules** page.

Modifying a Rule

- 🖉. Mouse over the pencil to display the rule conditions for the specified rule. Click on the pencil 🖉 to open the rules dialog page for editing.

- **Enter a Name for this Rule.** This is your unique identifier for this rule, modify as needed.

- **Add the Rule Conditions.** Click the **Conditions Editor** button to make modifications to the rule conditions.

- **Conditions**. Updates to existing conditions is not possible, deleting and re-adding is necessary. To add another condition the And/Or will be required.

- **Add Condition.** Click to add a new **Condition**. See *Creating Rules* (on page 19). Clicking Add Condition without and And/Or will by default generate the "And" requirement.

- **Add AND/OR.** After adding a regular condition and saving, before another condition can be added, an "AND" or "OR" must be selected before another condition can be added.

> **Note:** "AND" requires all conditions be true for the rule to pass; while "OR" requires only one of the conditions to be true to pass.

- **Delete Condition**. Click next to the condition that needs removing.
- **Save**. Click to save condition modifications. The dialog will return to the previous rule page.
- **Action Type.** Options are: **Move to mailbox**, **Forward**, **Delete**, **Copy**, **Bounce**.
- **Target**. Enter the name of the target mailbox that will receive messages that are selected by your rule.
- **Save**. Click to save rule modifications. The mail rule page will display.
- **Save Changes**. Click to save the Rules file.

Creating Rules Using Regular Expressions

The expressions for each element of a delivery rule are shown in the following table.

Message Areas	Expression
From:	F
Subject:	S
Sender:	N
To:	T
Entire Header (everything preceding the body)	H
Entire Body of Message	B
Condition	**Expression**
contains	**~**
does not contain	**!~**
equals	**=**
does not equal	**!=**
Text Pattern	**Expression**

Any character	.
Any of the values separated by vertical bars within the parentheses; the vertical bar represents "or"	(this|that|other)
Any word character (a-z, A-Z, 0- 9)	\w
Any non-word character	\W
Any digit (0- 9)	\d
Any non- digit	\D
Any white space (spaces and/or tabs and/or carriage returns	\s
Any non-white space	\S
Any punctuation character (any character other than \w or \s)	\p
Any non-punctuation character	\P
Quantifier	**Expression**
Zero or more	*
One or more	+
Exactly 100	{100}
At least n1, but not more than n2 (where n1 and n2 are numbers)	{n1,n2}

Note: The following characters have special meaning in a rule: **{} () \| * + , . : \ [] ^ $** If you want to use one of these characters in a search string, precede it with a backslash. For example, to search for a plus sign, enter \+ in the search string.

Example

You use Outlook to read your mail. Anti-spam identifies spam by inserting the word SPAM into the X-Header, and Outlook labels spam by inserting " [s] " into the header, you may wish to route these messages to a folder you have created called SPAM.

To do this

- Create a new rule, such as Rule 4
- Where the **Subject Text** Contains "\ [SPAM\] " OR "\ [s\] ",
- The **Action Type** is **Move to Mailbox**,
- And the **Target** is "SPAM".

Manage Away Message

How to get here

You can automatically send an **Away Message** message to anyone who sends you mail. This feature is activated when **Enable** is checked and saved on the Away Message dialog. Enter a message in the **Away Message** text box and then **Save**.

Your **Away Message** will only be sent once to each email address that sends you mail, while the Away Message is enabled. Email addresses that have received your Away Message are tracked, to prevent an email address from receiving your Away Message more than once. Disabling the **Away Message** resets the email addresses tracking file.

> **Note:** This feature is similar to the *Auto Responder* (on page 24) feature which sends an automatic response to each message that is received, regardless of whether or not the sender has already received the automatic response.

To Activate your Away Message

To enable your **Away Message** click **Action > Manage Away Message** from the upper left menu.

- **Enable.** Checking this check box will begin notification to each user who sends you mail after saving.
- **Message.** This text box allows entering a message once enabled. This message will be sent once to each user who sends you a message.

> **Note:** after entering **Away Message**, click **Spell Check** to review and correct spelling

- **Save**. Click **Save** to enable your **Away Message**.

> **Note: "Away Message Enabled"** will appear above your navigation tree as a reminder.

To Stop Sending an Away Message

- Clear the **Enable** check box. This will also **reset the email tracking** for the next time the **Away Message** is enabled.
- **Save**. Click **Save** to disable your **Away Message**.

Manage Auto Responders

How to get here

> **Tip: Auto Responders** can also be accessed by right-clicking on a specified mailbox and selecting **Manage Auto-Responder** from the menu. This option will only update the auto response for the selected mailbox.

Use an automatic response so that each time you receive message, a prepared message is sent back to the sender. This feature is activated when the **Enable** check box is checked for a specified mailbox.   Once activated text can be entered in the **Message** box.

The navigation folder will display an icon to the right of all mail folders that have auto-responders setup.

> **Note:** To prevent automatic responses to bulk mailers, an automatic response is not sent if the original message contains the `"Precedence:bulk header"`.
>
> To prevent automatic responses to list server mailing lists, automatic responses are not sent if the original message contains `"imailsrv"` in the mail address.

- **Mailbox.** Select the mailbox from the drop down list box to activate the automatic response for all incoming mail being sent specifically to the mail folder.

> **Note:** This list box will display an icon to the left of all mail folders that have auto-responders setup.

- **Enable.** Select the check box to enable the Auto Responder. Clear the check box to disable it.
- **After Responding Forward mail to.** Enter the e-mail address you want e-mail inquiries forwarded to after the automatic response is sent. Leave blank if forwarding is not required, this will leave all requests in their associated mailboxes.

Note: Should you want the message to be deleted without any forwarding. Enter as follows: `"user-NUL@hostname.com"`

- **Message.** In the text box, enter the message to be returned to all senders who send mail to the specified mailbox.

> **Tip:** The first line of the body of the message is used as the subject line for the automatic response.
>
> **Note:** After entering your text, click ABC **Spell Check** to review and correct spelling

- 💾 **Save**. Click **Save** to activate or de-active your Auto Responder messages.

Manage User Options

In This Chapter

Manage User Options allows you to customize and personalize your web client settings.

Click **Action > Manager User Options** from the top Menu bar.

Note: Remember to click **Save** after making changes to your user settings. Some options require closing tabs or logging out before the setting changes will appear.

General Options

How to get here

User Options - General Options Tab

- **Display Name.** Enter your preferred full name in the text box.
- **Reply To.** Enter your complete email address in the text box.
- **Forward To.** Enter the email address to which you want all your email automatically forwarded.
- For example, to forward your messages to another email address simply enter the forwarding address as `yourUser@domain.com`, or to forward to another mailbox besides your main Inbox enter the forwarding address as `ID-othermailbox`.

> **Note:** To forward your email to another email address and also keep a copy in the original mailbox, precede the email address with "." allowing no spaces in between .
>
> **Example:** ".,email@address.com"

- **Default Encoding**. Default message encoding used for sending messages. Default setting is Unicode (UTF-8).

- **Unicode (UTF-8).** Choose this character set for multi-language mail. In IMail, this includes English, Chinese Simplified, Chinese Traditional, French, German, Italian, Japanese, or Spanish.

- **English (US-ASCII).** For composing email for English-speaking readers, based on the English alphabet.

- **Western European (ISO-8859-15).** For composing email in French, Italian, German, or Spanish.

- **Chinese Traditional (BIG5).** For composing email in traditional Chinese.

- **Chinese Simplified (GB2312).** For composing email in simplified Chinese.

- **Japanese (ISO-2022-JP).** For composing email in Japanese.

- **Initial Item to Display**. Default is None. This drop down box allows users to select the folder to display upon initial login.

- **Default Page** - The **"Today"** tab, displays message folders and message folder sizes. This can be manually accessed by clicking on the **Today** tab.

- **Main Menu Bar**.

- **Display Shortcut Compose Button**. Set by default. Unchecking this option will move the "Compose" email button to the **Action menu**.

- **Timezone Offset.** Set to Automatically Determined by default. Changing this offset will affect two items. 1) The time stamp that is displayed on all received messages will be adjusted, and 2) All calendar appointments will be adjusted.

- **Adjust for daylight savings time.** Set by Default. Automatically adjusts for daylight savings when in place.

Receiving Messages

How to get here

User Options - Receiving Messages Tab

- **New Mail Check Frequency**. Default setting is 10 minutes. Allows the user to define how often their mailbox's are checked for new messages.

- **Only check for new messages in the Inbox**. Default setting is unchecked. For users with large mailboxes and only receive Inbox mail messages. This feature can save computer processing time, for user's that do not receive messages to other sub-folders.

- **Enable new messages notification pop-up**.   Default setting is checked. This feature controls the small brief notification pop-up when new messages arrive.

- **Make the browser tab text blink when new messages arrive.** Checked by default. This feature allows the user to control the number of blinks when a new message arrives.

- **Number of times to blink the text**. By default the browser tab will blink 5 times. This feature allows the user to control the number of blinks when a new message arrives.

- **Play a sound when new messages arrive**. Set by default. This feature allows the user to turn the sound off when new messages arrive.

- **Sound Override URL**. Enter the full url for an external sound file to override the default sound set by the IMail Server. To **reset** to the default sound, simply clear the existing URL and click **Save**.

Viewing Messages

How to get here

User Options - Viewing Messages Tab

- **Reading Pane Location:** Default setting is "Below". This drop down box allows customizing how to display the message to the user.

> Note: **Beside** and **Below** will split your message list window, and allow previewing of the selected message within the same tab.

- **None.** Selection of a message will open a new tab for message preview.

- **Beside**. Selection of message will open to the right of the message list, within the same tab for message preview.

- **Below**. Selection of message will open below the message list for message preview.

- **Paging Style.** Set to Next, Previous and Numeric Pages by Default. This option allows a multitude of paging options. Select one to best suit your need.

- **Paging Location.** Set to Bottom by default. This option controls the display of the paging location on the message list.

- Top

- Bottom

- Top and Bottom

- **Number of Items Per Page**. Set to 10 by default. This controls the number of messages to display per page of your message list before paging. A scroll bar will appear when page overflows.

- **Paging Always Visible**. Not checked by default. This option controls the paging display. Unchecked, the paging will not display when only one page of messages are present.

- **Display Text Alongside Paging Buttons.** Not checked by default. This option controls the display for the total message count located to the right of the paging control.

- **Enable Selection Checkbox In Message List**. Checked by default. This feature allows selection of a message by use of a check boxes. Unchecked this checkbox will revert to usage of message highlighting with usage of the shift+ key for blocks of messages, or the ctrl+ for multiple random messages on a page.

> **Note:** For existing users before who have a saved user preferences file, the check box option will be turned off. For existing users that have never saved their preferences, they will be treated as a new user with the check box option turned on.

> **Important:** "Check All" will only apply to the currently displayed page for the standard web client.

- **Show Column Filtering Upon Load**. Not checked by default. This will add search filtering capability to the mailbox being displayed. Click on the filter icon to fine tune and narrow your message search.

- **Display Embedded Images as Attachments**. Not checked by default. Embedded images within a message take up a lot of your email storage space and take longer to load for viewing. Checking this option will make all embedded images as mail attachments.

- **Enable image suppression in messages**. Checked by default. This feature will suppress images for all messages. Once the link has been clicked, the images will always display when the message is selected. A link will appear at the top of the message display.

> **Note:** Once this link is clicked, the images will always display when the message is selected.

- **Enable Javascript suppression in messages**. Checked by default. This feature when checked will search all messages and disable any javascript encountered.

> **Note:** Your IMail Administrator may have made this setting a mandatory requirement for all your mail messages, in which the Enable image suppression and Enable Javascript suppression **will not display** as user options.

Composing Messages

How to get here

User Options - Composing Messages Tab

- **Send Messages As Plain Text By Default.** Not checked by default. HTML is the default setting to compose your messages. Includes many features such as bold, italic, underlining, multiple fonts, multiple colors, bullets, numbering, etc. Checking this option will compose your message using no formating.

- **Show the CC Field By Default**. Checked by default. Select this checkbox to always display the CC field when composing a new message.

- **Show the BCC Field By Default**. Not checked by default. Select this checkbox to always display the BCC (Blind Copy) field when composing a new message.

- **Save a copy of the Message in the Sent Folder**. Checked by default. Choose this option if you wish to keep copies of your messages in the **Sent** folder.

- **Automatically add recipients as contacts**. Not checked by default. Choose this option if you wish to automatically add recipients to your Contacts when sending new messages.

- **Enable Recipient Auto-Suggestion**. Checked by default. Choose this option to automatically suggest message recipient names as you type them in the "To" text box when writing a new message. If the recipient exists in your contacts, a drop down containing the complete name appears.

> **Note:** This feature is not available in the Lite Client, due to the large bandwidth requirement.

- **Include Recipient Groups in Auto-Suggestion**. Checked by default. This option when selected will include contact groups for selection from the "To" text box when writing a new message.

- **Show a warning before sending messages with a blank subject**. Checked by default. This option controls the warning pop-up when a message is sent without a subject.

- **Show a warning before sending messages that contain attachment words but have no attachment**. Checked by default. This option is designed to assist in reminding users when a document contains references of an attachment, when an attachment does not exist.

- **Auto-Save To Draft Frequency**. Default is 10 minutes. This option controls the message auto-saving to drafts feature. This number is the amount of minutes between each save to drafts when composing a message.

> **Note:** To turn Auto-Save off completely, set the Auto-Save To Draft Frequency to zero.

- **Alternate From Address**. Drop down displays all saved alternate from email addresses. To add an alternate address enter an email address and click 🟢. To delete, simply select the alternate address to delete and click ❌.

- **Signature**. A "**signature**" is a tag that is added to the end of all your messages. For example, you might add a signature that says, "Be sure to visit my new web site." Or, you might prefer to enter your name, phone, and address information. Enter the desired text in the **Signature** text box. If you do not want to include a signature, leave it blank.

> **Note:** If you use the rich text editor to compose messages and you want to include text formatting on your signature, you can format the signature by adding standard HTML tags to the signature.

Example:
```
<h4>John Q. Public</h4>
<h5>Phone 706-123-4567<br>
Fax 706-321-7654</h5>
```

Forwarding Messages

How to get here

User Options - Forwarding Messages Tab

- **Include Original Message When Forwarding.** Checked by default. This check box will include the original message when forwarded.
- **Include Original Attachments When Forwarding.** Checked by default. This check box will include the original attachments when forwarded.
- **Include Signature When Forwarding**. Checked by default. This option will   insert the user's signature when forwarding.

Replying To Messages

How to get here

User Options - Replying To Messages Tab

- **Include Original Message When Replying.** Checked by default. This check box will include the original message in your reply.
- **Include Original Attachment When Replying**. Unchecked by default. This will include all original attachments when replying.
- **Include Signature When Replying**. Checked by default. This option will   insert the user's signature when replying.

Deleting Messages

How to get here

User Options - Deleting Messages Tab

- **Show a Confirmation dialog before Deleting Messages.** Set by default. Select this check box to have a request for confirmation before deleting the selected message(s).

- **Deleting**. Radio button options.

- **Upon deletion, move messages to the Deleted folder.** Set by default. Select this option to move deleted messages to the Deleted folder. These messages remain in the folder until you purge them by selecting one or more messages and clicking the **Delete** button.

- **Upon deletion, purge messages from the system.** Select this option to completely remove deleted messages. Purged messages are deleted from the server and cannot be recovered.

Reporting Messages

How to get here

User Options - Spam Reporting

The **Spam Reporting** tab is only available for email customers with IMail Premium Servers. Customers with IMail Standard Servers will not display this tab option.

- **Show a confirmation dialog before reporting messages.** Checked by default. This option ask for a confirmation before reporting the message as spam.

Spam Reporting Options (select one)

- **After reporting, do nothing to message.** This option will report the message as spam and will be delivered to your Inbox as regular mail.

- **After reporting, delete message**. Set by default. This option will report the message as spam and then delete the message.

- **After reporting, move message**. Default is Spam. This option will report the message as spam and then move your message to another folder. If no folder is selected a default Spam folder will be created. Select from the drop down text box to move your spam messages to an alternate mail folder.

> **Note:** When a mail folder is not selected from the drop down text box, then a Spam folder will be created after saving.

Contacts

How to get here

User Options - Contacts Tab

- **Default List Sort.** Set to Display Name by default. This option controls the sort option for your contacts when initially displayed.

- **Default Address Book..** Set to Personal Contacts by default. This option controls the default address to use when selecting email addresses for sending.

Calendaring

How to get here

User Options - Calendaring Tab

- **Show a confirmation dialog before deleting appointments and tasks**. Set by default. Unchecking this option will suppress the confirmation prompt when deleting calendar appointments and tasks.

- **Enable Reminders**. Set by default. Unchecking this option will suppress all calendar reminders.

- **Default Calendar**.   Set to personal Calendar by default. This option allows user to select which calendar will open by default when creating a new appointment using the **Action menu > New Appointment**.

- **Day Start Time**. Set to 5am by default. This option controls the actual start time of the day to display on the Day Calendar.

- **Day End Time**. Set to 10pm by default. This option controls the actual end time of the day to display on the Day Calendar.

> **Note:** Click Show 24 Hours to display (located at bottom of page of the Day Calendar) all hours of the day on the Day Calendar.

- **Workday Start Time**. Set to 8am by default. This option controls the work day start time by setting a darker contrast on the Day Calendar.

- **Workday End Time**. Set to 5pm by default. This option controls the work day end time by ending the darker contrast on the Day Calendar.

- **Minutes per Row**. Set to 30 minutes by default. This option controls the number of minutes between each displayed row.

- **Number Of Days to Display in Multi-Day**. Set to 3 by default.   This option control the total number of days to display when using the Multi-Day function. An option found in the top right corner of the main Calendar page.

- **First Day of the Week**. Default is Automatically Determined. This option controls which day of the week to display for the week. (e.g. United States uses Sunday as the first day of the week)

- **Initial View**.   Default is Day. This option controls the initial calendar view when tab is displayed. Options are **Day**, **Week** or **Month**.

Change Password

How to get here

Your System Administrator controls the complexity of your user password settings. Carefully read all rule requirements for changing your password.

- **Current Password**. For security purposes enter the current password.

> **Note: New Password** `can not be set to "password" or your` **Username**

- **New Password**. Enter your new password in the text box.

> **Note:** Passwords must meet the minimum length as set by your IMail Administrator, cannot include spaces, and cannot exceed thirty characters.

- **Retype Password**. Retype the new password in the text box.

> **Tip:** Valid special characters are as follows `[! @ # $ % ^ & * ( ) _ + } { " : ' ? / > . < ; ,`

Change Theme

How to get here

Themes allow you to customize and personalize the look and feel of the user's web client. To change the theme go to **Action > Change Theme.**

Once the **Change Theme** dialog appears, select a theme from the **Theme** drop down menu list. The selected theme will display a sample in the dialog. Click **Apply** to save the theme to your web client.

> ⛔ **Warning:** Applying a new theme requires all tabs to be closed to apply new settings. Be sure drafts are all saved.

Compose New Message

Click **Compose** to create a new message tab to designate recipients, compose email, add attachments, and send email. You can customize your message by using the formatting and style toolbars located above the message box.

- **Send.** Click to send the message, with or without an attached file.
- **Cancel.** Click to cancel composing and sending a message.
- **Save As Draft.** Click to save a draft of your message in the Drafts email folder. Select the message in the Draft folder later to re-open the message, then click **Edit Draft** to continue composing the message.

> 📓 **Note:** By default your new message will automatically "Save to Drafts" every 10 minutes. This option can be modified to suit your own preference at **Action > Manage User Options > Composing Messages**.

- **Attachments.** Click to display the **Attachments** text box, click the Select to add an attachment. For more information, see *Viewing and Managing File Attachments* (on page 46).
- **Options.** Click the Options button to show display options for the Compose Message page.
- **Show CC**. Select this option to display the Carbon Copy (CC) text box.
- **Show BCC.** Select this option to display the Blind Carbon Copy (BCC) text box.
- **Send as Plain Text**. Select this option if you do not want your message formatted with the text styles and formatting toolbar settings. Because you are sending mail over the Internet, you may prefer to use plain text rather than adding formatting that recipients might not be able to see. Plain text is text without formatting (bold, italic, underlined), bullets, or alignment.

  When this option is cleared, the rich text editor is displayed for message composition. Rich text messages include .htm tags to format the text.

> **Note:** After composing in formatted text, you can select the **Send Message as Plain Text** check box under **Options**.

- **Save in Sent Folder.** Select this option to save a copy of each message sent to the **Sent** email folder.

- **Save Recipients in Contacts Folder**. From the list box, select the address book to which you wish to add the message's recipient(s).

- **Priority**. (Set to normal by default) Options are Low, Normal and High. Setting the priority to **Low or High** will set a flag that will display in your recipients mailbox status. This allows recipients to know that as a high priority, the message should be read as soon as possible.

- **Encoding.** Choose one of the following to compose your New, Forward, or Reply message:

  - **UTF-8.** Choose this character set for multi-language mail. In IMail, this includes English, Chinese Simplified, Chinese Traditional, French, German, Italian, Japanese,or Spanish.

  - **English (US).** Choose this character set for sending mail composed in English only.

  - **Western European.** Choose this character set for sending mail composed in French, Italian, Spanish, or German.

  - **Chinese Traditional.** Choose this character set for sending mail composed in traditional Chinese.

  - **Chinese Simplified.** Choose this character set for sending mail composed in simplified Chinese.

  - **Japanese.** Choose this character set for sending mail composed in Japanese.

> **Note:** You can also set your Composing Message Options on the User Options page.

- **Alternative From Address**. This option allows you to send mail with a different "From" email address. This is useful when you would like a recipient to reply to a different email address than the actual address.

> **Note:** To add an alternative email address to this drop down go to **Action > User Options > Composing Messages**.

- **To.** In the text box, enter the email address(es) of the person(s) to whom this message will be sent. For more information, see *Using Contacts to Address a Message* (on page 61).

- **CC.** In the text box, enter the email address(es) of person(s) to whom you'd like a copy of this message to be sent. For more information, see *Using Contacts to Address a Message* (on page 61).

- **BCC.** In the text box, enter the email address(es) of person(s) to whom you'd like a copy of this message to be sent, without the recipient's address appearing in the message. For more information, see *Using Contacts to Address a Message* (on page 61).
- **Subject.** Enter the subject of the email into the text box.

Text Styles and Formatting Toolbars

By selecting formatting styles, font types, sizes and colors from the list boxes, you can customize your messages. Individual help (known as Tool Tips) is available for each button by mousing over the button.

Mouse over the adjacent buttons to access information on the functions of the different tools.

 Help button. Telerik Help pop-up is also available to assist in defining all the formatting buttons.

 Spell Checker (on page 37). Use the AJAX Spell Checker to check your message's spelling before sending

Using Spell Check

Use the AJAX Spell Checker to check your message's spelling before sending.

1   To access Spell Check, click **Spell Check** on the toolbar.
2   The Spell Check Web Page Dialog appears. The tool scans your message and displays in yellow, one word at a time, any word that does not appear in its dictionary.

Choose from the following options:

- **Change To**. Select from the list of words to replace the highlighted word.
- **Ignore**. Click this button if you choose to ignore the possible spelling error.
- **Add to dictionary.** Click this button to add the word in yellow to the Dictionary.

Managing Mail

In This Chapter

Deleting Email

To Delete a Single Message
1   Select a mail folder from the navigation panel to display in a new tab.
2   To delete a message

- Select the checkbox of a message in your message list, or

- Select a message to view in the Message List or

- Double click a message to view in a new tab.

3   Click **Delete** on the Message List toolbar, or click the **[DELETE]** key to delete a message.

To Delete Multiple Messages

To delete multiple messages when the checkbox option has been disabled, press **[CTRL]** and click multiple messages in the Message List or in a folder, then click **Delete** on the toolbar, or click the **[DELETE]** key to delete the messages.

- OR -

Press **[SHIFT]** and click the first and last message in a consecutive list of messages, then click **Delete** on the message list toolbar, or click the **[DELETE]** key to delete the messages.

> **Note:** Messages will be deleted immediately unless you have selected *Move to Deleted Folder*
> (on page 32) on the *Manage User Options* (on page 26) page.

Replying to and Forwarding Email

To Reply To a Message

1 Select a mail folder from the navigation panel to display in a new tab.

2 To reply to a message

- Select the checkbox of a message in your message list or

- Select a message to view in the Message List or

- Double click a message to view in a new tab.

3 Then click **Reply** or **Reply All** to start a message in a new tab.

- A **Reply** message automatically addresses the message to reply to the message sender.

- A **Reply All** message automatically addresses the message to reply to the original message sender and all message recipients.

- `"Reply"` and `"Reply All"` will not include any attachments only the original message, unless your **Replying options** (on page 31) has been changed in your **User Options** (on page 26).

4 Use the *compose email* (on page 35) options to complete the message.

To Forward a Message

1 Select a mail folder from the navigation panel to display in a new tab and select a message to display in the Message List.

2 Click **Forward** to start a forward message in a new tab.

3 Enter the email address for the recipient to whom you want to send the message. If attachments were included in the original message, they are included with the forwarded message unless you delete them before sending, or have changed your **Forward options** (on page 31) in **User Options** (on page 26).

4 Use the *compose email* (on page 35) options to complete the message.

Checking Email

Your email message list is **auto-refreshed every 10 minutes by default**. This frequency interval is a **User Option** that can be customized under **Action > Manage User Options > Receiving Messages > New Mail Check Frequency**.

When a **New Message** arrives the following occurs:

- The new message count will be displayed in red, selecting the **Inbox** will refresh the message list tab if one exists.
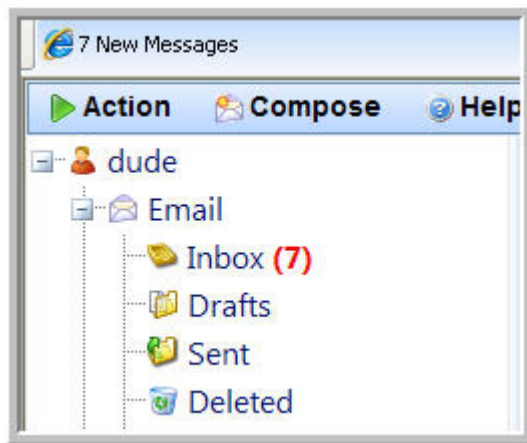
- The opened browser tab will flash at intervals specified in the user options (**Action > Manage User Options > Receiving Messages**), and will change to **"xx New Messages"**.

- A sound file will play upon the arrival of new messages ". This sound file can be customized, under **Action > Manage User Options > Receiving Messages**.

- A small pop-up will briefly display in the bottom left corner of the web client browser stating a new message has arrived.
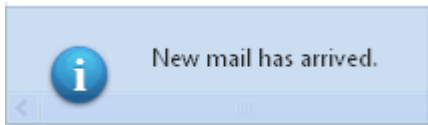
To display these new messages click on the **Refresh Mail** button and your **Inbox** will refresh your message list with the new unread messages.

Mail Actions

- **Report as NOT Spam**. Selecting this feature will forward the selected mail message to Commtouch Advanced Security Daemon editors for submission as NOT being spam. After review the Commtouch editors will remove the signature information from the global spam database.

- **Report as Spam.** Selecting this feature will forward the selected mail message to Commtouch Advanced Security Daemon editors for spam submission. After review the Commtouch editors will add spam signature information to it and have it published to the global database to further eliminate spam for other users.

> **Note:** Multiple messages can be selected and the **Report as NOT Spam** or **Report as Spam** can be selected and sent all in one time.

> 💡 **Tip:** All messages already marked and forwarded as Spam or NOT Spam will be ignored if forwarded again.

- **Move/Copy (on page 48).** Selecting this option will initiate the Move/Copy feature to move or copy the selected message(s) to another mail folder.

- **Mark as Read**. Selecting this option will remove the bold message feature and new message count, making the message a read message.

- **Mark as Unread**. Selecting this option will bold the message and update the new message count, making the message a new unread message.

- **Search Messages** (on page 43). Enter search criteria in the **Keyword** textbox and click 🔍. The search will process through the open mailbox against the following:

- To

- From

- Subject

- Body, Headers

- **Show / Hide Filters**. Displays column filters above the message list, allowing custom searching by columns.   Columns allowed for search are:

- From

- Subject

- Received Date

- Size.

To always show these filters above the columns go to **Action > Manage User Options (on page 26) > Viewing Messages** (on page 28) [Tab] and check the option for **Show column filtering upon load**.

Viewing Email

View messages by clicking on the **Inbox** or (any other mail folder) from the navigation panel which appears below the **Email** folder list located at the top of the navigation panel. on the upper left page. Click a folder and select a message to view.

- **Today Tab** (default is the Today tab). To change this setting, for example to open the **Inbox** upon logging in go to **Action > Manage User Options (on page 26) > General Options (on page 26) [tab] > Initial Item to Display** and select from the drop down menu.

- **Reading Pane Location** (default is set to display below the message list). This can be changed by going to **Action > Manage User Options (on page 26) > Viewing Messages (on page 28) [tab] > Reading Pane Location**, then click a message in the message list to view. The selected message displays in the preview pane below the message. You can also double-click a message to open it in a separate browser window.

> **Note:** When the **Reading Pane Location** option is set to `"None"`, double-click a message to display the message in a new tab.

Message List

- **Attachment** column. Displays a ✎ when an attachment is included with a message.

- **Message Status** column:

    - ▪ = New/Unread message

    - ▪ = Replied message

    - ▪ = Forwarded message

    - ▪ = Deleted message

    - ▪ = Draft message

    - ▪ = Low Priority

    - ▪ = High Priority

- **From** column. Displays the message originator.

- **Subject** column. Displays the message subject line.

- **Received** column. Displays the message received date and time.

- **Size** (bytes) column. Displays the message size in bytes (including any attachments).

- **Preview Pane**. View the message selected from the message list in the preview pane. You can also *view message header information* (on page 45) for each message.

Message List Sort Order

Message List will revert to its original default sort order of `"Date Received"`, when the user logs out or the message folder tab is closed.
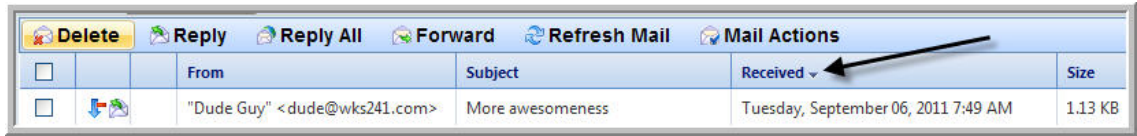
Clicking the column header of the message list once will sort the message list in ascending order, and clicking again will resort in descending order.

Clicking the corresponding column header (shown by the arrow) on any of the following columns to change the message sort:

- **Message Status**
- **Attachment**
- **From**
- **Subject**
- **Received** (date and time)
- **Size** (kilobytes)

Viewing Folders and Messages

You can view and manage folders in the Email folder list on the left side of the page. After you open a folder, messages are displayed on the right side of the page.

To view folders and messages in the Email folder list

- Click a mail folder from the navigation panel to display the message list. The messages in the selected folder will display to the right side of the navigation panel.
- Click a message in the message list to view the message.
- If a folder includes sub-folders, a **"+"** is displayed to the left of the folder. Click the **"+"** to expand the folder view and select sub-folders.
- Click the **"-"** (minus sign) next to a folder to collapse the folder view. Click the **"+"** (plus sign) next to a folder to expand its view.

Searching Email

Basic Search and Column Filtered Searching

Use the basic search feature to search a selected mailbox folder for a specific word or phrase. Use the column filters to further customize your search criteria.

Using the Basic Search Tool

The basic **Search Messages** tool located under the **Mail Actions** of a displayed mail folder, searches all parts of an email message (for example, To, From, Subject, Body; etc.)

Multiple word entries are considered a phrase. You do not have to enclose the phrase in quotation marks. For example, the entry, "quarterly earnings report" will search for messages that contain that phrase. It will not search for messages that contain just the word "quarterly" or "earnings," or "report."

- Open the mail folder to be searched, and select **Mail Actions > Search Messages**.
- In the **Search** box, enter a search phrase in the **Keyword** text box and click .
- To **clear** the search results click **"Refresh Mail".**

Note: If you are looking for a name or email address, enter it.

Examples:

- Fred@domain1.com
- Jane Public
- Joe

Note: If you are looking for a phrase or keyword.

Examples:

- benefits
- quarterly earnings report
- project milestones

Using the Column Filtering Search Tool

To display column filters if not showing from an open mail folder select **Mail Actions >**
Show/Hide Filters. To **clear** column filters click **Mail Actions >** **Show/Hide Filters** again.

Enter search criteria in one or more of the search options:

- **From / To.** Enter a sender's email address, or a portion of the address, to search for messages sent from the sender.
- **Filter** button. Click this button to select all the possible criteria for the text being searched.
- **Subject.** Enter subject text, or a portion of the subject text, to search text in subject headers.
- **Filter** button. Click this button to select all the possible criteria for the text being searched.

- **Date**. Clicking the Calendar icon will display a current calendar allowing you to customize for a particular date. For example, if you select the Date greater than 06/27/2011, the search will display all messages greater than 06/27/2011 but not including 06/27/2011.

- **Time**. The Time icon can further narrow the search by including a time stamp.

- **Filter** button. Click this button to select all the possible criteria for the text being searched.

- **Size**. Select this option to search for messages that include an email attachment.

- **Filter** button. Click this button to select all the possible criteria for the text being searched.

Search Results

The Search Results list all messages that meet the search criteria selected from the **Filter**. Click a message in the search results list to view the message.

Viewing Message Headers

You can view message headers in the message preview pane. In addition to sender and receiver information, headers provide message routing and transport information, such as the Message ID, Content Type, and MIME version.

Select a mail folder from the navigation panel to display in a new tab, then select a message to view.

- **Print.** In the top right corner of a displayed message, click this icon to print the message.

- **Show/Hide Envelope.** Located in the the top right corner of a displayed message.

- Click the icon to **Show the Envelope** and display the message **From**, **To**, **CC, BCC**, **Date**, and **Subject** information.

- Click the icon again to **Hide the Envelope**.

- **Show/Hide Header.** The **Header** icon is displayed within the Envelope. Once the **Show Envelope** is selected to expand the message address and subject information, you can click the **Show Header / Hide Header** icon located in the top left corner above the **From** line of the Envelope.

- Click the icon to **Show the Header** and show the detailed message header information.

- Click the icon again to **Hide the Header**.

- **From.** Displays the name of the sender.

- **Add to Address Book**. Click the icon to save to the personal Address Book.

  - **First Name**. Verify the First Name has been populated correctly. Edit as necessary.

  - **Last Name**. Verify the Last Name has been populated correctly. Edit as necessary.

  - **Email Address**. Verify the Email Address has been correctly populated.

45

- ▪ **Address Book.** Choose an Address Book from the list box in which you wish to save the Contact.

  - ▪ **Save.** Click to save the contact.
- ▪ **To.** Displays the name of the recipient.
- ▪ **Date.** Displays the date and time the message was sent.
- ▪ **Subject.** Displays the subject of the message.

Paging Through Email

When there are too many messages in your mailbox(es) to display on one page, a navigation panel with a "Page Size" drop down will appear at the bottom of the message list. By default the **Paging Style** is set as below, `"Next, Previous and Numeric Pages"` There are a multitude of paging styles to choose from. This setting can be modified by going to **Action > Manage User Options (on page 26) > Viewing Messages (on page 28) [tab] > Paging Style**.

💡 **Tip:** Saving your **Paging Style** will require the Message List tab to be closed and reopened to display the new Paging Style.

To navigate the email message list using the navigation panel (above):

- ▪ Click [|◄] to go to the first page of the message list.

- ▪ Click [◄] to go to the previous page from the currently displayed page in the message list.

- ▪ In the **Paging Panel**, select a page number to go to a specific page number in the message list.

- ▪ Click [►] to go to the next page from the currently displayed page in the message list.

- ▪ Click [►|] to go to the last page of the message list.

- ▪ Click the **Paging Size** drop down to increase the number of messages to display per page.

Viewing and Managing File Attachments

If an email message has a file attachment, you can view or save the attachment.

To view an email file attachment:

1 Open an email message.
2 Click the file attachment you want to view. The **File Download** dialog appears.
3 Click **Open** to view the file attachment in the browser.

To save an email file attachment:

1   Open an email message.

2   Click the file attachment you want to save. The **File Download** dialog appears.

3   Click **Save** to save the file attachment to a folder. The Save As dialog box appears.

4   Browse to the folder where you want to save the file, then click **Save**.

Deleting Attachments

After you have added a file attachment to a message you are composing, if you need to remove the attachment before sending the message, click   next to the attachment name. The file is removed from the message.
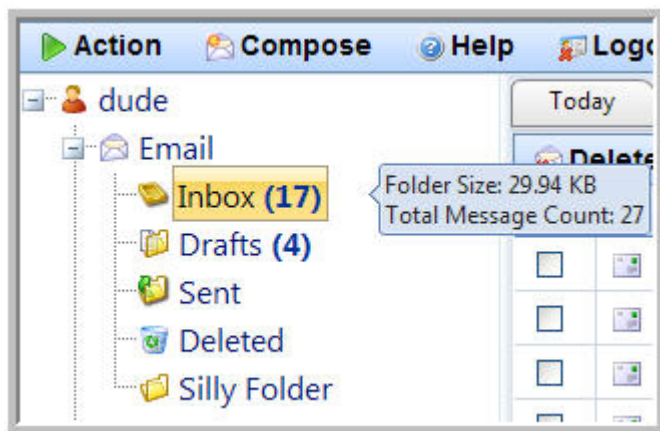
Viewing Unread/Read Message Count

The unread email message count displays to the right of each mail folder.
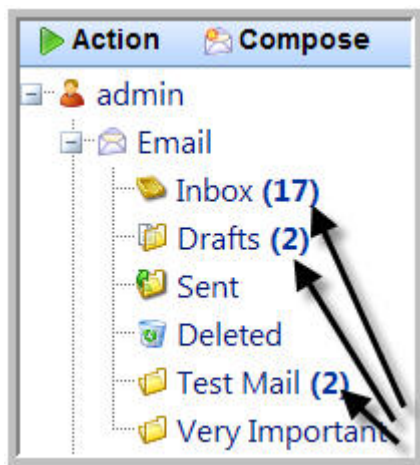
The total number of messages within a mailbox can be displayed by mousing over the mailbox.

Example The image below is displaying the tooltip by mousing over the **INBOX.** Displaying 17 new messages and 27 total messages.

> **Note:** The **Draft** folder will allows display the new message count as the total number of draft messages in the folder.

Moving or Copying a Message to Another Folder

To move or copy message(s) to another folder:

1 In the **Message List**, select the message(s) to move or copy. To select multiple messages when checkbox option has been disabled:

- Press **Ctrl** and click multiple messages in the Message List.
  - OR -

- Press **Shift** and click the first and last message in a consecutive list of messages.

2 Click on **Mail Actions > Move/Copy** to open the pop-up dialog.

3 Select to highlight the destination folder.

4 Click **Move** to move the file(s) to the selected folder.
-OR-
Click **Copy** to copy the file(s) to the selected folder.
-OR-
Click **"X"** to cancel.

Printing a Message

You can print individual email messages by clicking the **Print** icon in the upper right corner of the displayed message.
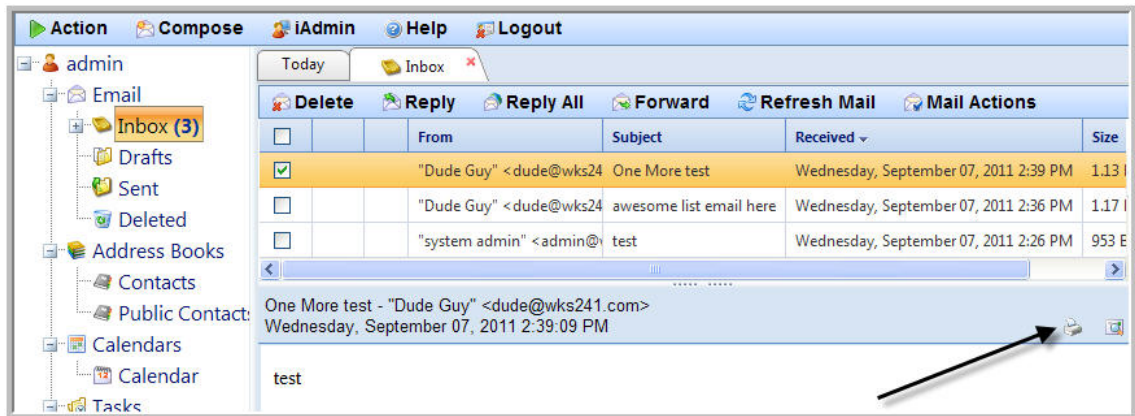
> **Note:** You can print only one message at a time.

To Print A Message

1 Select the mail folder to display in a new tab.

2 Select and display the message to be printed.

3 The **Print** icon is located in the upper right corner of the message.

4   The **Print** dialog appears. If necessary, change the Print options in the dialog and click **Print**. The designated printer will print your message.

Editing Drafts

When you click **Save to Drafts**, rather than **Send** while composing a message, the message draft is saved in the **Drafts** folder and can be re-opened for further composing, editing, and sending at a later time if necessary.

Auto-save to drafts will automatically activate depending on your **User Options** (on page 26) setting for **Composing Messages (on page 30) > Auto-Save To Draft Frequency** (set by default to 10 minutes).

> ⚠️ **Caution:** It is recommended to **Save to Drafts** to prevent any loss of data, should any system/software malfunction occur.

To edit a draft email:

1   Click on the **Drafts** folder to display all current drafts in a new tab.

2   Double click to open and continue editing the drafted message. The message will open in a new tab as a **New Message**.

3   Make any changes as if it were a *new message* (on page 35) and click **Send**, **Cancel**, or **Save to Drafts**. You may continue to revise a message and **Save to Drafts** indefinitely until you are satisfied with your message.

Viewing Disk Space

Disk space utilization will only display if your IMail Administrator has set space limitations on your user account.

The disk space utilization will display as shown below in your `"Today"` tab.   It shows the amount of disk space used and the maximum amount still available.

> 💡 **Tip:** Hovering over a mailbox in the navigation panel will display the total `"Folder Size"` and `"Message count"`

Should someone send a message after your disk space limit has exceeded, it will be rejected and returned to the sender.

A simple solution to save space is to empty out the **Sent** and **Deleted"** folders.   You can also turn off your deleted folder to all all messages to purge when deleted. This can be controlled from the menu **Action > Manage User Options > Deleting Messages"**.
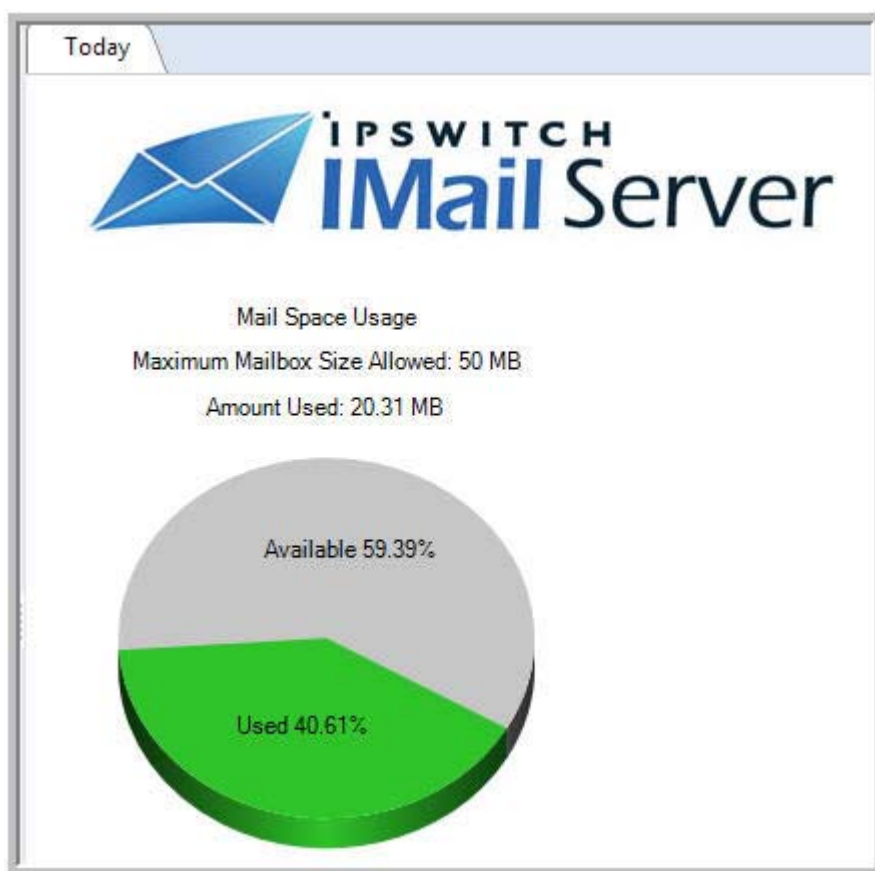
Viewing Mailbox Sizes

Viewing Mailbox Sizes

Total Mailbox Size. Total mailbox size and total message count can be obtained by hovering your mouse of the Email which can be found directly under your User Name at the top of the navigation folder.

Individual Mailbox sizes. Individual mailbox size and count can be obtained by hovering your mouse over any mailbox found within the navigation folder.
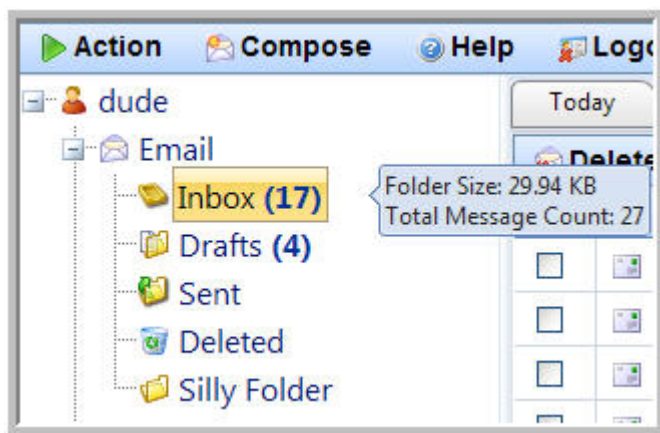
Address Books

In This Chapter

The **Address Books** folder contains all your public and personal contacts. Use the Address Books folder to add and manage contacts in your IMail Web Client. In the left menu bar, click **Address Books**, then click the Contacts folder you want to access.

If IMail Collaboration is installed and *Contact sharing is enabled* (on page 10), contacts and contact groups imported from Microsoft Outlook will automatically begin synchronizing and updating in your IMail Web Client Address Books on a regular basis. When you add new contacts in the Web Client Address Books, the new contact information will synchronize and update in your Outlook contacts.

Related Topics

Synchronizing Outlook using IMail Collaboration (on page 10)

Public Folders and Shared User Folders (on page 13)

Permissions for Shared Folders (on page 14)

Importing / Exporting Contacts (on page 57)

Managing Contacts

When you open your Contacts, a preview of your contacts and groups displays. You can search, view or edit additional contact/group information for each contact entry. Capability to *Export and Import* (on page 57) your contacts with other users or to Microsoft Outlook.

Contacts

Add Contact (on page 53). To create a new contact within the selected contact folder.

Add Group (on page 55). To create a new contact group within the selected contact folder.

Delete All. To permanently remove all contacts displayed.

Import Contacts (on page 57). To Import a Contacts file (.csv or .vcf)   into the selected contact folder.

Export Contacts (on page 57). To Export selected contacts to a (.csv or .vcf) file from a selected contact folder.

Search Contact Feature:

This search feature can locate contacts by the first name, last name or email address. The search is instant and begins to narrow your contact content as you type.

To Display Contact Information

After selecting a **Contacts** folder, click the **Contact Name** to display the contact information.

Related Topics

Synchronizing Outlook using IMail Collaboration (on page 10)

Importing / Exporting Contacts (on page 57)

Importing vCards into Outlook (on page 61)

Add / Edit a Contact (on page 53)

Deleting a Contact (on page 55)

Add/Edit a Contact

To Add a Contact

- Click on **"Address Books"** from the folder tree on the left.
- Click on **"Contacts"** to display your personal contacts.
- On the Contacts page, click the **Add Contact** icon to display the contact information page.

Entering Contact Information

- **Photo**. Set to Display without photo. Select and upload a photo for the specified contact.
- **Name Information**. All information is optional, Only one of the following text boxes must contain data to be saved:
- First Name,

- Last Name, or
- Email Address.

Optional Contact Information

- **Internet Information**. Optional.
- **Personal Information**. Optional.
- **Company Information**. Optional
- **Phone Numbers**. Optional.
- **Home Address**. Optional.
- **Business Address**. Optional.

> **Tip:** You can also add a new contact or multiple contacts by going to your **Action > User Options (on page 26) > Composing Messages (on page 30)** and selecting the **Automatically Add Recipients as Contacts** option. This will add all recipients in every new message as a contact if it does not already exist.

> **Tip:** Another way to add a new contact is via the **Add to Address Book** icon in the **Hidden Header** (on page 45) area of a displayed message. Click the icon to add the sender to your contact list.

 Save. Click Save to Add item or

 Cancel. Click Cancel to clear the page without saving.

To Edit Contact Information

1 Click on **"Address Books"** from the navigation panel on the left.
2 Click on **"Contacts"** to display your personal contacts in a new tab.
3 On the Contacts page, hover over a contact to edit and click on the edit icon. This will display all contact the information.

 Save. Click Save to Add item or

 Cancel. Click Cancel to clear the page without saving.

Related Topics

Managing Contacts (on page 52)

Deleting Contacts (on page 55)

Importing / Exporting Contacts (on page 57)

Importing vCards into Outlook (on page 61)

Deleting Contacts

To Delete a Contact

When you delete a contact, if you are using IMail Collaboration, the contact is removed from your Outlook contacts list the next time Outlook synchronizes with the IMail Collaboration database.

1 On the Contacts page, hover over the contact to delete and click **Delete**. A **Confirm Deletion** page opens.

2 Click **Yes** to delete the contact.

-OR-

3 In the Contacts preview display, select the contact to delete and click **Delete** in the upper right corner. A **Confirm Deletion** page opens.

4 Click **Yes** to delete the contact.

Related Topics

Managing Contacts (on page 52)

Adding a Contact (on page 53)

Importing / Exporting Contacts (on page 57)

Importing vCards into Outlook (on page 61)

Managing Group Contacts

You can organize your contacts into groups. The Contact Groups page exists to manage the creation, maintenance and deletion of all personal groups.

> **Note:** Public Folders require special Administrator permissions to update. Most users have only `"Read"` access.

By *user options* (on page 26) default *contacts* (on page 33) are display by the `"Display Name"`. To easily view all available groups, changing the "Sort By" to "First Name" or "Last Name" will bring all Groups to the beginning of the contact list.

Group Member Display

To display group details click on the **"Group Name"** link and all group details will display to the right of the contact list.

- **Group Name**. Displays to the right of the contacts list.
- **Group Members**. Displays the Display Name and Email Address of all group members.

Related Topics

Synchronizing Outlook using IMail Collaboration (on page 10)

Add / Edit a Group (on page 56)

Managing Contacts (on page 52)

Importing / Exporting Contacts (on page 57)

Importing vCards into Outlook (on page 61)

Adding / Editing a Group

Groups allow the capability to easily send the same message, or the same meeting requesting, by selecting the group name when creating a new message.

To Add a Group

To create a new personal group open your contacts folder and click **Add Group**. The **Add Group** page will appear to the right of the displayed contacts.

To Edit a Group

To edit a group locate the Group Name within the contact list and mouse over and click the [Edit this item] icon to open the group page. Displaying the group first will also allow the Edit in the upper right corner.

Add / Edit Group

- **Group Name**. Enter the name of the group.

Potential Group Members

- **Address Book**. From the drop down list box, select the Contacts/Public Contacts folder you need to for your new Contact Group.
- **Sort By**. Default is Display Name. From the drop down select the order in which you would like to see your contact list displayed.

> **Note:** The default setting for "Sort By" can be modified within the **Action > User Options (on page 26) > Contacts (on page 33) > Default List Sort.**

- **Search**. Default is blank. To narrow your contact list enter the beginning letters to narrow your contact list.

Contact List

- **Name**. This column displays the corresponding names for contacts.
- **Address.** This column displays all contacts that are not currently in the group.

Button Selection

(Add All to Group). Click to move all contacts within the folder to the new group.

(Add Selected Address to Group). Click after selecting a contact to move to the new group

(Remove Selected Address From Group). Selected group member will be removed.

(Remove All From Group). Click to remove all members from the group.

> **Note:** Removing a group member that does not exist in the contact list, will remove the group member permanently after saving.

New Group Members

- **Name.** Group member name.
- **Email.** Group member email address.

Add New Group Member

You can add a new contact to a group that does not already exist in your contact list by entering the indicated information and clicking **Add New**.

- **Display Name**. Enter the name of your new contact.
- **Email Address**. Enter the email address of your new contact.
- **Create As Contact** Checked by default.
- **Create As Contact (Checked).**   Will create a new contact for the current address book displayed and will also add as a group member.
- **Create a New Contact (Not Checked).**   Will **not** add to the current contact list; and will **only** add this email address as a group member.

Related Topics

Managing Contacts (on page 52)

Managing Contact Groups (on page 55)

Importing / Exporting Contacts (on page 57)

Importing vCards into Outlook (on page 61)

Importing / Exporting Contacts and Groups

Export your Contacts and Groups to share with another user or to import into Microsoft Outlook. Specific "csv" file format is required for proper importing into the IMail Web Client. See *Exporting Contacts from Outlook* (on page 59).

> ⚠️ **Warning:** Exporting a "csv" file from a different mail client will not import correctly without modifying the column format. It is recommended to only export from the IMail Web Client and import into another user's IMail Web Client. See *CSV file format* (on page 59).

To Export All your Contacts and Groups

- Click on your contacts in the left navigation panel to display in a new tab, then click **Export Contacts** to bring up the Export Contacts dialog.

Export Contacts Dialog

- **Which file format do you wish to export?**

- **IMail comma-separated values**. A comma delimited file (.csv) designed strictly for importing into another user's IMail Web Client contacts folder.

- **vCard**. File format for Micosoft Outlook import. Groups are not supported by vCard and will not be included should this option be selected.

  - **Separate vCards into individual files**.   Checkbox will create a zipped file containing a separate vCards (.vcf) for each contact.

- **Export all contacts or the currently displayed from your search result?**

- **All**. Export all contacts and groups.

- **Search Results**. Your contacts can be narrowed down by using the search box. Checking this radio button will only export the selected contacts displayed within your current tab.

- **Export Contacts**. Click this to begin the export process. A windows File Download dialog will appear allowing you to decide where to save the file. When the process is complete, click the Close Window to return to your Contacts tab.

To Import Contacts in your IMail Web Client

Importing Contacts and Groups must be in vCard format or the IMail comma-separated file format to import properly. Click on your contacts in the left navigation panel to display in a new tab, then click **Import Contacts** to bring up the Import Contacts dialog.

Import Contacts Dialog

- **Select**. Click to bring up the windows File Upload dialog to allow selection your .csv or .vcf file to import.

- **File Encoding**. (Default set to Unicode) Use the default Unicode setting for files exported by the IMail Web Client.

- **Import Contacts**. Click this to begin the import process. Depending on the size of the file processing may take longer. Upon successful import simply close the dialog, and the contacts should be viewable in the existing open contacts tab.

Exporting Contacts from Outlook

To export your Outlook Contacts for importing into the IMail Web Client, requires use of Outlook's Import and Export Wizard using **"Map Custom Fields"**. It is necessary that the ".csv" file generated match the exact column order as specified below, to allow correct import into the IMail Web Client.

It is recommended to use the Web Client for exporting, to avoid the mapping of custom fields, as the IMail Web Client automatically generates a ".csv" file in the proper format to import into another user's contacts.

To Export Your Contacts From Outlook using a CSV File Format

- From **Outlook** select **File > Import and Export**.

- This will open the **Import and Export Wizard**. Select "Export to a File". Click "Next".

- Select "Comma Separated Values" either DOS or Windows. Click "Next".

- Select the Contacts folder to be exported. Click "Next".

- Select the file name and location where to save the exported file. Click Next.

- Click on **Map Custom Fields**.   It is recommended to Clear the Map on the right window and follow the order of the columns as listed below.

Note: Not all column names will match up exactly, for example "Nickname" is not found in Outlook 2007. The key to the "csv" file is that there is a place holder for each column to keep all data in the correct order. Select a field name that is similar or one that is not being used.

Caution: It is very important that the following column order be followed. Not adhering to the order will import data into the wrong fields.

Column Title
Display Name
Title
First Name
Middle Name
Last Name
Suffix
Nickname
Email Address
Email Address 2
Email Address 3
Website / Webpage
Instant Messaging Address
Spouse / Partner

Column Title
Birthday
Anniversary
Company Name
Job Title
Department
Office
Manager's Name
Assistant's Name
Profession
Home Phone
Mobile Phone
Business Phone
Business Fax
Other Phone
Home Street
Home City
Home State / Province
Home Zip / Postal Code
Home Country / Region
Business Street
Business City
Business State / Province
Business Zip / Postal Code
Business Country / Region
Other Street
Other City
Other State / Province
Other Zip / Postal Code
Other Country / Region

Importing vCards into Outlook

To Import a single vCard into Outlook

- Open Outlook and select **File > Import and Export**, the Import and Export Wizard dialog appears.

- Selected Import a VCARD File (.vcf), click **Next.**

- Locate and select the location of the VCARD, click **Open**.

- Click on your contacts in the left navigation panel. Your new VCARD should be available and visible.

To Import multiple vCard(s) for 2010 Outlook and later

- Open Outlook and click on your contacts.

- Locate the file location of the VCARDs. Exporting multiple VCARDs using the IMail Web Client will store the VCARDs in a zipped folder. Open the folder, and select the desired VCARD's to import.

- Simply drag and drop the VCARD's onto the Outlook Contacts page.

- Your new VCARDs should be accessible and visibly displayed.

Addressing a Message Using Contacts and Public Contacts

To use email addresses in your Contacts and Public Contacts to address a message:

1   On the **Compose** page, click **To: CC:**, or **BCC:**. The **Contacts Selection** page appears.

2   **Select All**. Select this checkbox to select all your contacts to add to your new message as recipients.

3   **Address Book**. From the drop down textbox choose which Contacts folder to select email addresses.

4   **Sort By**. Select the sort order of your contacts for easier selection. (Display Name, First Name, Last Name, and   Email Address)

5   **Search**. To narrow your contacts search, enter a minimum of 2 letters. Click   to process your search.

6   Click a contact name in the list, then click **Insert and Continue** if you plan on locating more contacts to add or **Insert and Close** to add the contact and close the Contacts selection page.

    - OR -

    Click **Close** to cancel this process.

7   All selected contacts should appear in your **To:** textbox.

Converting Contacts

If you used contacts or contact groups (distribution lists) in a previous version of Ipswitch Web Client or in Microsoft Outlook with the IMail Collaboration plug-in, the contacts and contact lists are automatically imported into the new IMail Web Client. A new Contacts folder is created within your Address Books folder.

- Ipswitch Web Client contacts and or contact lists (distribution lists) are imported and converted as a one-time process, during the IMail Collaboration installation. This will import contact data from the `"aliases.txt"` file. The new imported data will appear in the Web Client Contacts folder.

- Permissions to access this new imported data must be setup manually by your IMail Administrator.   Contact your IMail Administrator if your contacts and or contact lists (distribution lists) are no longer appearing under your Address Books.

> **Note:** Contact lists (distribution lists) imported from a previous version of Ipswitch Web Messaging are read only. They cannot be edited or added to after they are imported during the IMail Web Client installation.

Related Topics

Address Books (on page 52)

Synchronizing Outlook using IMail Collaboration (on page 10)

Public Folders and Shared Contacts (on page 13)

Calendars

In This Chapter

Related Topics

Public Folders and Shared User Folders (on page 13)

Permissions for Shared Folders (on page 14)

Using the Calendar

> **Note: Calendars** is displayed only if the IMail Administrator has enabled the Web Calendaring service.

Calendars when available will appear in the navigation panel. Within the Calendars you can manage appointments, send out meeting requests, manage multiple calendars (including *Public and Shared Calendars* (on page 14)). See **Action > Manage User Options > Calendaring** for personal usability options.

Viewing Today's Appointments

Selecting and opening your Calendar or Public Calendar to a new tab, will by default display the current **Day** view.

> **Tip:** Click ◀ to view the previous day, and click ▶ to view a future day. This allows you to quickly view different days as needed.

Adding a new calendar folder

To create additional calendar folders, click *here* (on page 16).

Changing the Displayed Calendar Date
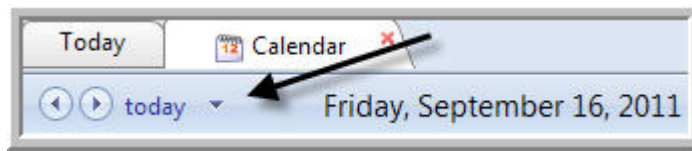
- When using **Day** view, to change the day shown in the calendar simply click the drop down and select a date from the mini-calendar.

- Or -

Click [◀] to view the previous day, and click [▶] to view a later day.

- When using **Month** view, click on the arrows at the top of the mini-calendar, [◀] [▶] the month shown in the calendar will change accordingly.

Related Topics

Appointments (on page 64)

Sharing Calendars (on page 14)

About Meeting Requests (on page 68)

Appointments

Viewing Today's Appointments

Selecting and opening your Calendar or Public Calendar to a new tab, will by default display the current **Day** view.

> 💡 **Tip:** Click [◀] to view the previous day, and click [▶] to view a future day. This allows you to quickly view different days as needed.

Appointment Reminders

When you add an appointment, a reminder is automatically set to remind you 15 minutes before it is due to start. You can stop the appointment from reminding you by opening the **Appointment** page and unchecking the **Reminder** checkbox.

> ✅ **Note:** When a reminder is due, the Reminder dialog box below will pop-up and display.
>
> 📝 **Note:** To completely disable **Reminders**, go to **Action > Manage User Options (on page 26) > Calendaring** (on page 33) and uncheck the **Enable Reminders** checkbox.
>
> 💡 **Tip:** For reminders to work properly, be sure that your pop-up blocker is turned off.

- **Appointment Subject**. Displays appointment description.
- **Appointment Time**. Displays appointment time that is upcoming, or if overdue.
- **Time Left**. Calculates time left before appointment, or overdue.
- **Dismiss**. Click to dismiss selected item.
- **Dismiss All**. Click this button to dismiss all reminders displayed.
- **Remind Later**. Click this button to be reminded again by the number of minutes selected.

Related Topics

Using Calendar (on page 63)

About Meeting Requests (on page 68)

Sharing Calendars (on page 14)

Adding an Appointment (on page 65)

Editing an Appointment (on page 67)

Recurring Appointments (on page 68)

Create a New Appointment

To display the Appointment page for a new appointment select one of the two options:

1   Click the **Action** menu and select **Create New > Create New Appointment** from the menu selection.
2   Select your Calendar to display within a new tab, and double click on the date/time of the new appointment.

To Create a New Appointment

💾 **Save.** Click Save to Add item or

✖ **Cancel**. Click Cancel to clear the page without saving.

- **Make this a meeting request** (on page 69). Not checked by default. Checking this option will open a textbox similar to the Web Client "New Message To" button.
- **Subject**. Required. Enter a description for the appointment into the Subject field.
- **Calendar**. Default set to personal calendar. This drop down allows an appointment to be created within a different calendar.

> 💡 **Tip: Action > Manage User Options (on page 26) > Calendaring (on page 33) > Default Calendar** allows you to control the default calendar setting.

- **Location**. Optional. Enter location of meeting.

- **Priority**. Default is Normal. Option to set a Higher or Lower priority for an appointment.

- **Status**. Used by IMail Collaboration users, sharing calendars.
- Free.
- Tentative.
- Busy.
- Out of Office.
- Canceled.

- **All Day Event**. Not checked by default. Option to set an appointment takes uses the full day.
- **Start**. Specify a date and time for the appointment using the drop-down menu.
- **End.** Specify date and time appointment will end using the drop-down menu.
- **Duration**. Length of appointment.

- **Reminder**. Set By default. This option will not display when the user option for disabling reminders has been activated. This option controls the reminder generated for the appointment 15 minutes prior to its start. If you do not wish to be reminded, uncheck the Reminder checkbox. If you want to be reminded earlier than 15 minutes prior to the start of the appointment, select a different number of minutes from the reminder drop down.

> 📝 **Note:** To turn off all reminders permanently, go to **Action** menu **Manage User Options (on page 26) > Calendaring (on page 33)** and uncheck the **Enable Reminders** checkbox.

- **Make this private**. Not checked by default. This option allows an appointment to not display with your shared users.

- **Make this a recurring appointment** (on page 68). Check this option to display all the possible recurring cycles.

- **Recurrent Pattern**. Select Daily, Weekly, Monthly or Yearly.

- **Range of Recurrence**. Select when the recurring appointment should end.

- **Description**. This is a read only field, and only appears for display when editing appointment. Currently only Outlook has capability to update this text box.

Related Topics

Editing an Appointment (on page 67)

Recurring Appointments (on page 68)

Editing an Appointment

Changing an existing appointment

To change an existing appointment double click on the appointment. The **Appointment** page is displayed.

From within this page the following properties can be changed:

- **Subject**
- **Location**
- **Priority**
- **Status**
- **Start Time**
- **End Time**
- **Reminder**
- **Make this private**
- **Make this a recurring appointment** (on page 68)

Save and Close. Saves appointment. Located in the toolbar at the top of the page of the Appointment Properties.

Cancel. Press to cancel changes to appointment and exit.

Delete. Delete an existing appointment.

Related Topics

Adding an Appointment (on page 65)

Recurring Appointments (on page 68)

Recurring Appointments

Recurring appointments are appointments which occur more than once (daily, weekly, monthly and annually).

To create a recurring appointment, check the checkbox **Make this a recurring appointment** on the Appointment dialog page.

Appointments can be repeated daily, weekly, monthly or yearly.

- **Recurrence Pattern**. Specify the type of repetition needed for the appointment. e.g. Once a week, daily, monthly.
- **Range of Recurrence**. Controls the recurrence of the appointment.

> **Note:** The selection made for **Recurrence Pattern**, will control the display for **Range of Recurrence**, which controls the appointment repetitiveness.

Related Topics

Adding an Appointment (on page 65)

Editing an Appointment (on page 67)

Meeting Requests

Calendaring allows a user to send emails for requesting a user to attend a meeting or event. When a meeting request is sent to someone, they will receive an email containing all of the information regarding the event, similar to the Outlook request.

Through Outlook a meeting request email will be received that allows the following response:

- **"Accept"** will return an "Accepted" email response to the originator of the meeting request, and will also update the user's calendar.
- **"Tentative"** will return a "Tentative" email response to the originator of the meeting request, and will also update the user's calendar.
- **"Decline"** will return a "Declined" email response to the originator of the meeting request, and will remove the meeting request from the user's calendar.

> **Note:** If a meeting was originally scheduled without a Meeting Request, the user can always edit the event to send out an updated Meeting Request later.

> ⚠️ **Warning:** Client computers that do not have their DayLight Savings checkbox set (manual clock setting), and are in a Time Zone that uses Day Light Savings will have problems with their appointment conversions, when Day Light Savings turns on or off.

Related Topics

Creating Meeting Requests (on page 69)

Updating Meeting Requests (on page 71)

Canceling a Meeting Request (on page 71)

Creating Meeting Requests

Calendaring allows a user to send emails for requesting a user to attend a meeting or event. When a meeting request is sent to someone, they will receive an email containing all of the information regarding the event, similar to the Outlook request.

Creating a Meeting Request

1 From the **Main** page select the link for **Calendars**. Next, select the specific **Calendar** for the Meeting Request.
2 From the **List Actions** dropdown select **Create Meeting Request**, a new page will display the dialog for a new **Meeting Request**.
3 Upon completion of entering all meeting request information below, click **Send.**
4 This will generate the appropriate email to all users being asked to attend your Meeting.

Enter Meeting Request Information

- **Make this a meeting request**. This option will be checked when accessed via the **List Action > Create Meeting Request.**

- **"Required"**. Click this button to open the Contacts dialog to add email addresses for the **New Meeting Requests,** or enter the email address(es) manually.

- **"Optional"**. Click this button to add contacts that are for users that have the option to attend but is not required to attend. or manually enter the email address(es).

- **Subject**. Required. Enter a description for the appointment into the Subject field.

- **Location**. Optional. Enter location of meeting.

- **Calendar**. Default set to personal calendar. This drop down allows an appointment to be created within a different calendar.

> 💡 **Tip: Action > Manage User Options (on page 26) > Calendaring (on page 33) > Default Calendar** allows you to control the default calendar setting.

- **Status**. Used by IMail Collaboration users, sharing calendars.
- Free.
- Tentative.
- Busy.
- Out of Office.
- Canceled.

- **All Day Event**. Not checked by default. Option to set an appointment takes uses the full day.
- **Start**. Specify a date and time for the appointment using the drop-down menu.
- **End.** Specify date and time appointment will end using the drop-down menu.
- **Duration**. Length of appointment.

- **Reminder**. Set By default. This option will not display when the user option for disabling reminders has been activated. This option controls the reminder generated for the appointment 15 minutes prior to its start. If you do not wish to be reminded, uncheck the Reminder checkbox. If you want to be reminded earlier than 15 minutes prior to the start of the appointment, select a different number of minutes from the reminder drop down.

- **Make this private**. Not checked by default. This option allows an appointment to not display with your shared users.

- **Make this a recurring appointment** (on page 68). Check this option to display all the possible recurring cycles.
- **Recurrent Pattern**. Select Daily, Weekly, Monthly or Yearly.
- **Range of Recurrence**. Select when the recurring appointment should end.

Related Topics

About Meeting Requests (on page 68)

Updating Meeting Requests (on page 71)

Updating Meeting Requests

Updating Meeting Requests

1   From the **Main** page select the link for **Calendars**. Next, select the specific **Calendar** to locate the **Meeting Request**.
2   Select **"Meeting / Appointment"** by double clicking.
3   Modify meeting data, **Subject, Location, Start Time**, and any other information necessary, and click **"Send"**.
4   This will generate an **"Updated"** Meeting email messages to all users attending your Meeting.

> **Note: Outlook 2000 has a known issue** when receiving meeting requests, of not recognizing meeting requests when Reminder is turned on. Be sure to uncheck **reminder** if Outlook 2000 is being used.

Related Topics

Creating Meeting Requests (on page 69)

Canceling a Meeting Request (on page 71)

About Meeting Requests (on page 68)

Canceling a Meeting Request

Canceling a Meeting Request

1   From the **Main** page select the link for **Calendars**. Next, select the specific **Calendar** to locate the **Meeting Request**.
2   Select **"Meeting / Appointment"** by double clicking.
3   Once the Meeting / Appointment is open, click **Delete**.
4   This will prompt a pop-up asking for confirmation of deletion, click **OK.**
5   A second pop-up will now appear, asking if a cancelation email should be sent out to all attendees.
6   Click **"OK"** to send out cancelation notices

    "OR"

    Click **"Cancel"** to delete with meeting without sending notifications.

> **Note: Outlook 2000 has a known issue** of not recognizing meeting requests when the Reminder is turned on.   Be sure to uncheck **reminder** if Outlook 2000 is being used.

Related Topics

Creating Meeting Requests (on page 69)

Updating Meeting Requests (on page 71)

About Meeting Requests (on page 68)

Tasks

In This Chapter

Use Tasks for personal or work-related projects, assignments or to-do lists to track through completion.

Related Topics

Public Folders and Shared User Folders (on page 13)

Permissions for Shared Folders (on page 14)

Managing Tasks

When you open your Tasks, a preview of your tasks displays. You can search, view or edit any task entry as needed. Synchronizing using IMail Collaboration will allow all Outlook Tasks to be viewed, tracked and updated with the Web Client.

Tasks

Add (on page 74). To create a new task within the selected task folder.

Delete All. To permanently remove all contacts displayed.

> **Note:** Marking a task as complete can easily be identified by the Task description being crossed out.

Task Options

- **Sort By**. Set to Due Date by default. This selection drop down allows tasks to be sorted as you need. Options are by Start Date, Due Date, Status, Priority, Subject, and Percent Completed.
- **Display Completed Items**. Not checked by default. Checking this option will include all completed tasks.
- **Only Display Current Tasks**. Checked by default. Unchecking this option will display all open tasks.

- **Search Task**. This search feature can locate tasks by the subject. The search is instant and begins to narrow your contact content as you type.

To Display Task Information

After selecting a **Tasks** folder, click the **Task Name** to display the task detail information.

Related Topics

Add/Edit a Task (on page 74)

Recurring Tasks (on page 75)

Add/Edit a Task

Creating a Task

1 Click on **"Tasks"** from the folder tree on the left.
2 Click on **"Tasks Folder"** to display your personal tasks.
3 On the **Tasks** page, click the **Add** button to open and display a new tasks information page.

Task Information

Save. Click to save the **Task**.

Cancel. Click to cancel the **Task** and clear the page.

- **Subject**. Required. Enter a name for the task.

- **Priority**. Set to Normal by default. Use the Low, Normal and High Priority settings to assist in tracking your task progress.

- **Status**. Set to Not Started by default. Status options are listed along with valid Percentages allowed.

Status	Percent Completed
Not Started	0
In Progress	1-99
Completed	100
Waiting on someone else	0-100

Deferred	0-100

- **Date Completed**. Not set by default. Setting the Status to Completed will automatically mark the current date for completion. Change this date as needed.
- **Percent Complete**. Set to zero by default. Percentage Completion assists in tracking your task progress.
- **Total Work**. Set to zero by default. Used for estimating total billable hours.
- **Actual Work**. Set to zero by default. Used for actual work to be billed.
- **Mileage**. Optional. Needed for Billable mileage.
- **Billing Information**. Optional. Needed only for Billable data tracking.
- **Company**. Optional. Needed for Billing data.

- **Start**. Optional. Specifying a Start date will automatically set the same day to the Due Date.
- **Due**. Optional. The Due date will be pre-filled with the Start date, change this date as needed.
- **Reminder**. Set to 15 minutes by default.

- **Make this private**. Not set by default. Designed for user's sharing Tasks, this allows you to control what will not be shared, when marked as private.

- **Make this a recurring item**. Not recurring by default. Checking this option will make the task recur based on a regular interval, select the options for the frequency interval wanted.
- **Description**. This is a free format textbox allowing you to enter information pertaining to this task.

Related Topics

Managing Tasks (on page 73)

Recurring Tasks (on page 75)

Recurring Tasks

Recurring Tasks are slightly different than recurring appointments, in that occurrences all share the same information. Updating information on one task will update all occurrences.

To create a recurring task, check the checkbox **Make this a recurring item** on the Task dialog page.

Tasks can be repeated daily (everyday or just weekdays), weekly, monthly or yearly.

- **Recurrence Pattern**. Specify the type of repetition needed for the appointment. e.g. Once a week, daily, monthly.

- **Range of Recurrence**. Controls the recurrence of the appointment.

Note: The selection made for **Recurrence Pattern**, will control the display for **Range of Recurrence**, which controls the appointment repetitiveness.

Related Topics

Add/Edit a Task (on page 74)

Managing Tasks (on page 73)

Notes

Create and manage your **Notes** to synchronize with Outlook from your Web Client.

To Add a Note

1   To create a new note click on **Action > Create New > Create New Note**

- OR -

2   Select the **Notes** folder from your navigation panel and a new tab will open display all existing notes for the selected folder.

3   Click **Add Note** from the top tab menu.

4   A **New Note** pop up dialog will appear. Enter your note.

5   Click **Save** to add the note, or

6   Click **Cancel** to clear the page without saving.

Related Topics

RSS Feeds

What is RSS?

RSS (Really Simple Syndication) is a format for delivering regularly changing web content. Millions of web users around the world use it to keep up with their favorite websites. Many people describe RSS as a "News Feed" that you can subscribe to.

Adding an RSS Feed

Adding a new RSS feed only requires the RSS feed "URL" to setup and begin use.

1   Right click on   **RSS Feeds** from the navigation panel.
2   Select **Add**. A pop-up dialog opens.
3   Enter a description along with a valid "URL" of the RSS feed you want to create, and click **Save**.

-- OR --

1   Select   **Action > Create New >   Create New RSS Feed.**
2   A pop-up dialog opens.
3   Enter a description along with a valid "URL" of the RSS feed you want to create, and click **Save**.

CHAPTER 10

Websites

Website "URL's" listed within your navigation panel cannot be modified or updated by Web Client users. All Website "URL's" are controlled and configured by your IMail Administrator.

Index