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Webmail System
User Guide

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Welcome and Introduction

Thank you for choosing Excalibur Technology to handle your e-mail services. Like many other Excalibur services, we have strived to bring you the best possible e-mail solution. There are many enhancements and features to our web based e-mail system that you will not find on any other service. Our Webmail system provides an easy way for you to access your e-mail messages from anywhere in the world, using any Internet connected PC, using only a standard web browser such as Internet Explorer. There is no setup or configuration necessary to use the Webmail system, simply open a web browser and login with your username and password! It is that simple! Of course, you can always configure and use a POP3 e-mail program such as Microsoft Outlook to download and read your mail. Our Webmail interface is not meant to replace your POP3 program, it is simply an enhancement when you are away from your mail computer system and need quick and easy access to your messages. For more information on configuring POP3 clients, please see our website. Please read this entire manual to familiarize yourself with all of the options that are available to you.

System Requirements

- Any Internet-ready computer system or device capable of displaying DHTML graphics and running JavaScript
- An Internet connection
- Excalibur Hosting Service
- Your domain name, username, and password

Warranty and Disclaimer

This manual, the webmail interface, and all features are provided “as is” at no cost to our users. If you do not wish to use the webmail interface, please use a POP3 e-mail client such as Microsoft Outlook, Windows Live Mail, or Mozilla Thunderbird. No warranty or guarantee as to the performance of this system is made by Excalibur Technology Corp. We are not responsible for any accidental, incidental, or consequential damages that arise from using this system. You assume any and all risk involved by using this system.

Getting Started

How to Access Webmail

Starting the Webmail interface is extremely simple. Open any web browser and type the following line into the address bar: http://webmail.example.com where example.com is your unique domain name such as excaltech.com. Make sure that you ***do not type www*** when you enter the address as this will cause an invalid URL error. When you successfully type the URL, you will see the login screen, similar to below.

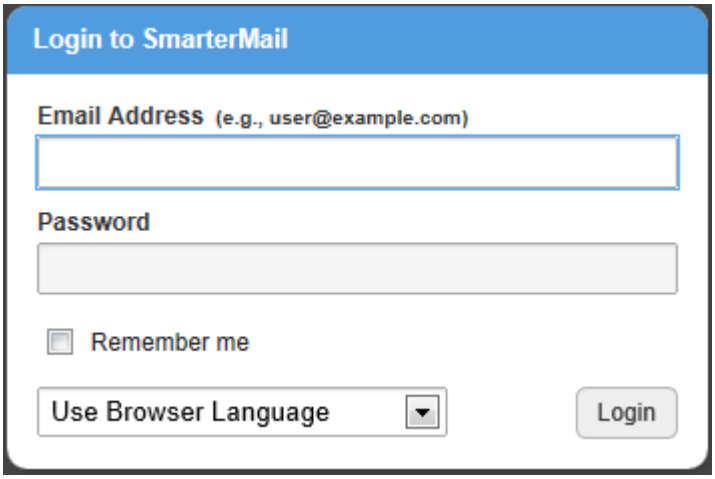


Figure 1 – Webmail Login Screen

In the Email Address box, enter your e-mail address. For example, if it is user@example.com, you would enter user@example.com. In the Password box, enter your mailbox password. If you do not have either of these pieces of information, please see your company e-mail administrator or call Excalibur Technology for additional help.

Once your information is entered, click the Login button to continue.

Main Webmail Screen

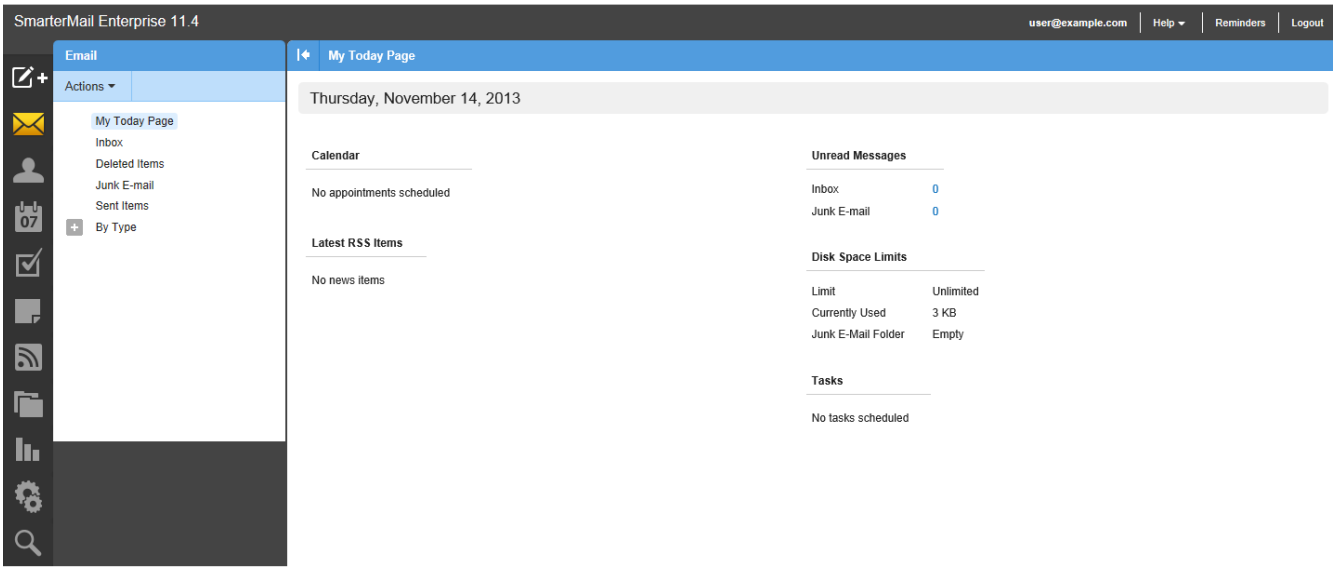


Figure 2 – The Today Page

Once you have successfully logged into the Webmail system, you will see a screen similar to the screen in figure 2.

Each of these sections will be described in detail in the coming pages.

Email

The email section is probably the most important part of the Webmail interface. From this page, you can create a new e-mail, go to your inbox, view deleted items, view drafts, view your sent items and view your "Today" page. Depending on your settings, when you log-in, you will see either your inbox or your "Today" page. Your "Today" page shows any appointments for today, any news items, how many unread messages you have, how much disk space is available and how much is used, and any scheduled tasks for today.

Creating a New Message

When you click on “New Message”, a window should pop-up similar to figure 3:

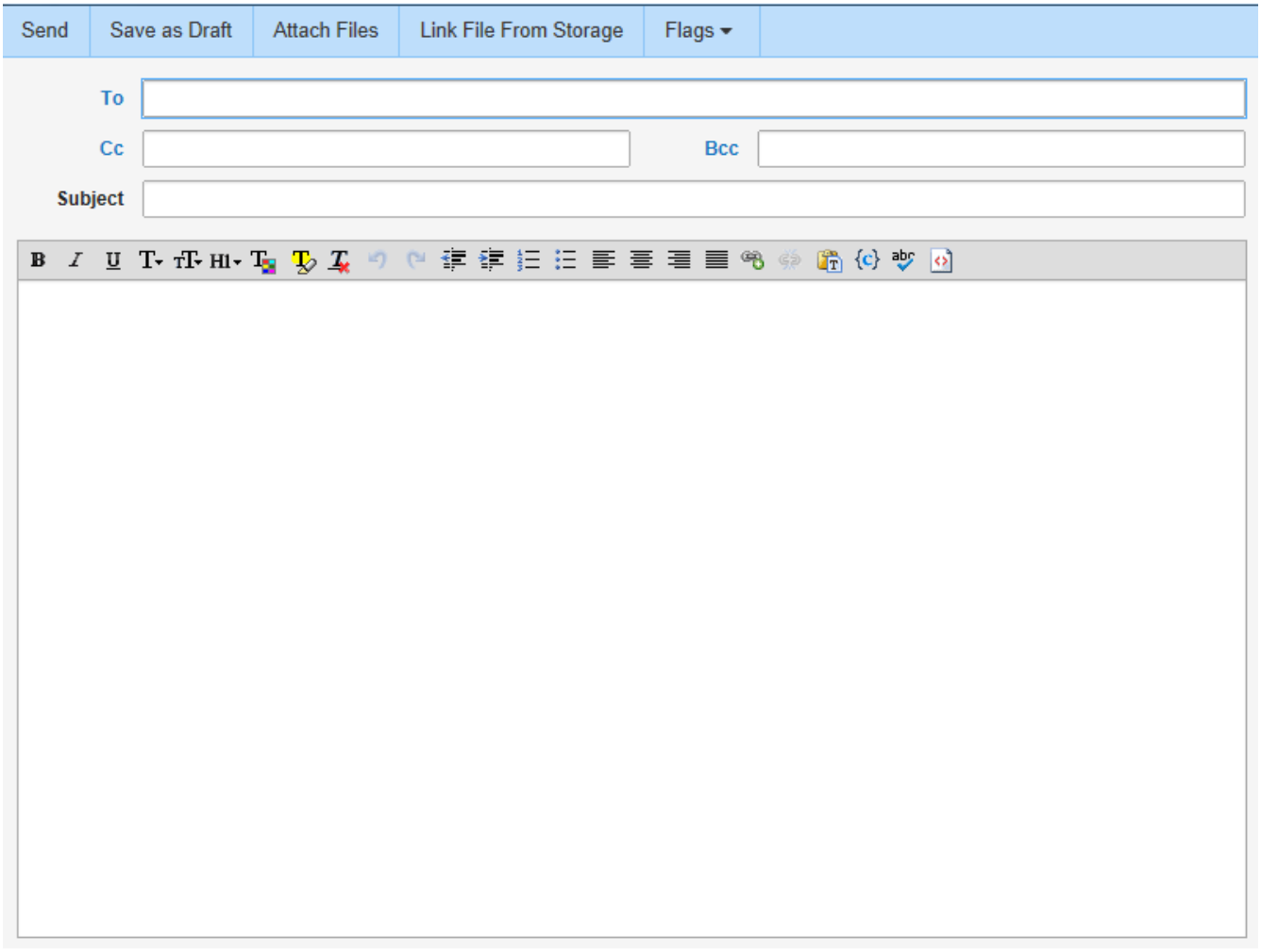


Figure 3 – New Email Popup Box

If no window appears, check that your pop-up blocker didn’t block it.

From this window, you can create a message and send it, save it as a draft to e-mail at a later time, or cancel creating a message.

There are three parts to creating a message, namely Compose, Options, and Attachments. These are explained in detail below.

Compose

"Compose" is where you actually create the e-mail. Here, you can specify the recipient of the e-mail, and any carbon copy (Cc) and/or blind carbon copy (Bcc) recipients. You can also enter the subject and body of your e-mail. Fill in the To, Cc, Bcc: and subject lines as you would any e-mail message, separating multiple addresses using a comma (,). If you wish to pick names from your online address book, click the "To", "Cc", or "Bcc" text.

Options

The "Flags" tab lets you choose the message importance and allows you to request a read receipt, as seen in figure 4.

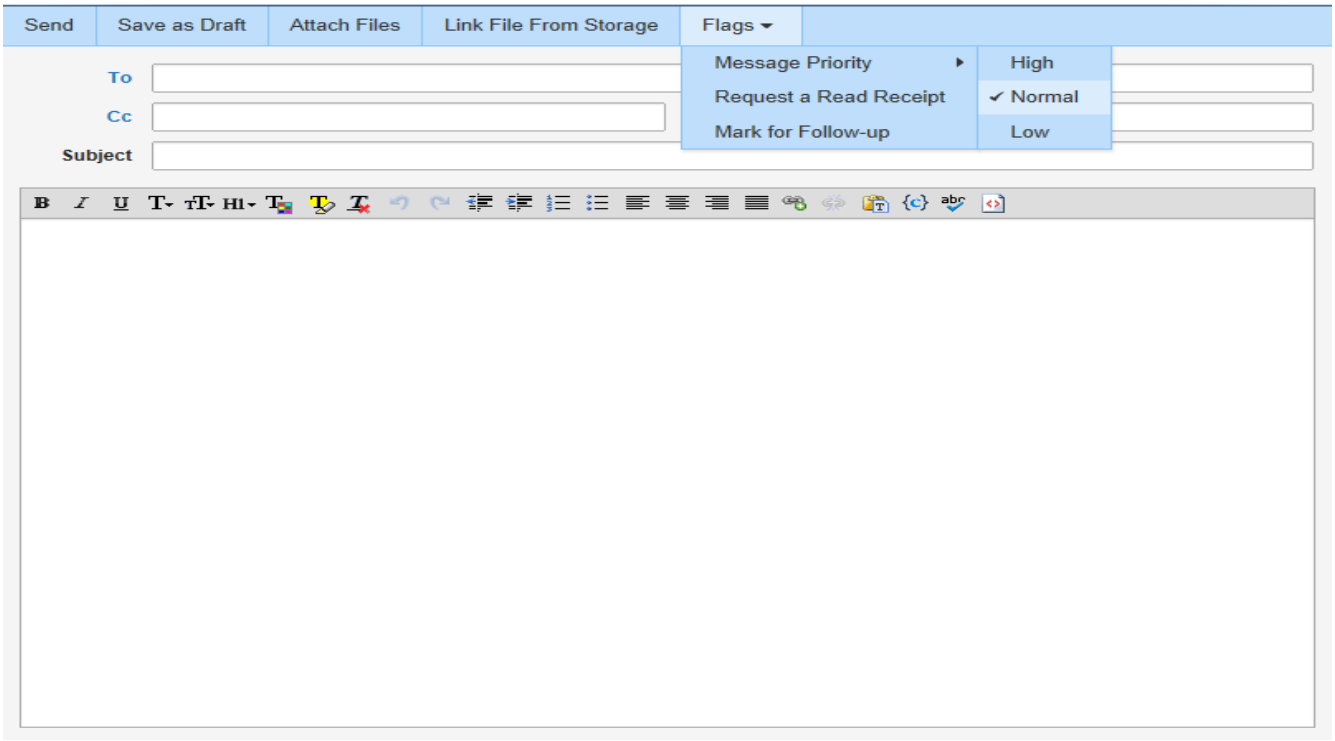


Figure 4 – New Email Options Tab

Attachments

The "Attachments" tab lets you add files to your e-mail. This is discussed in more detail in the "Attaching Files to Messages" section below.

Spell Checking Email Messages

If you wish to spell check your e-mail message before you send it, click the Spell Check button. ( ) Once you click the Spell Check button, the Spell Checker will run.

If no spelling errors are found, a message box will notify you of this. However, if there are any misspelled words, you'll see a screen similar to figure 5.

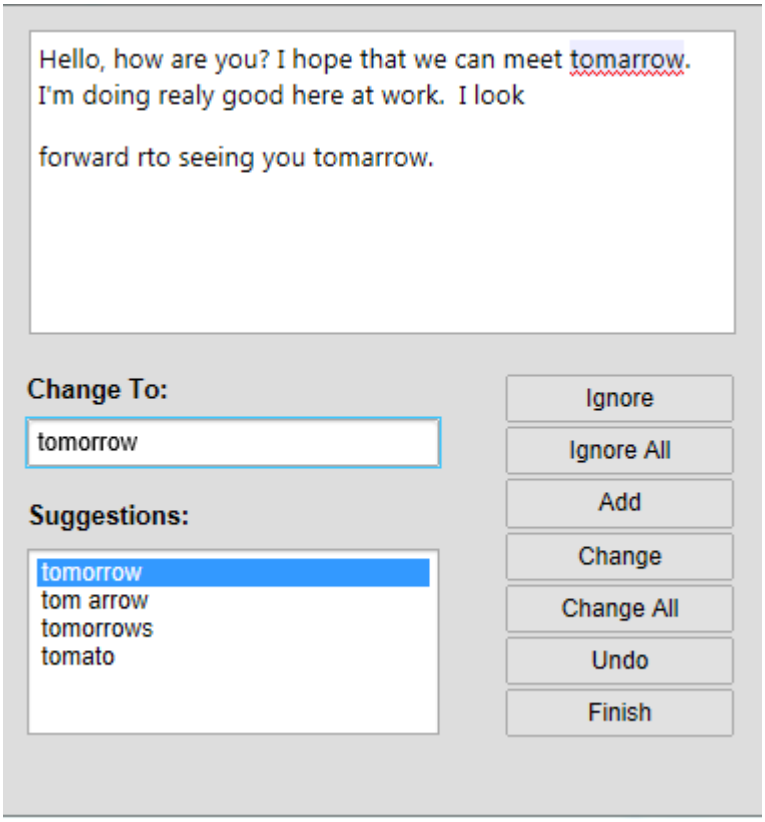


Figure 5 – Spellchecking in the Compose Message Window

To change any word, select the correct spelling in suggestions and click change.

Any misspelled words that occur multiple times (such as "tamarrow") will have both "Ignore" and "Ignore All" in the list. When you choose a new word to replace the misspelled word.

When you're done spellchecking, the window will close and return you to your message.

Attaching Files to Messages

If you wish to attach files to your e-mail, click the Attach Files tab at the top of the New Message window, as seen in figure 6.

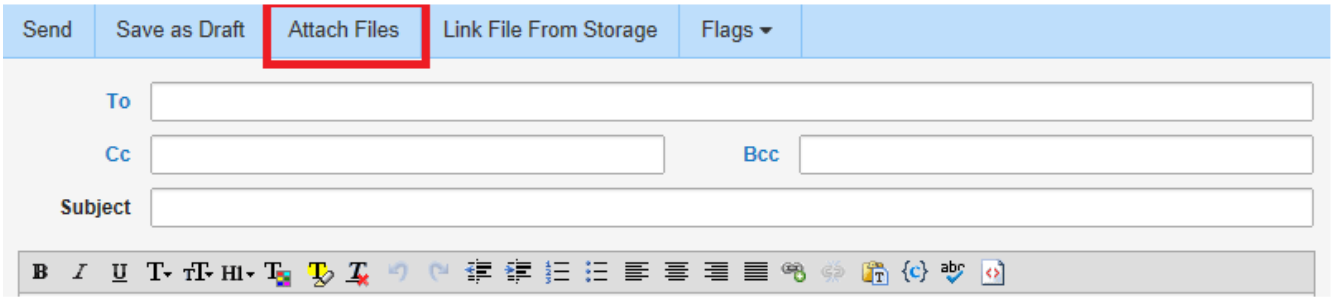


Figure 6 – The Attachments Tab of the New Message Window

Once you click Attach Files, this will bring up a standard file browsing window on your computer (This feature may not work on all systems or all browsers). Browse to the file you wish to attach and click the Open button. There will be a delay as the file is copied from your computer to the Webmail server. The larger the attached file, the longer the delay will be.

Note: File attachments must be less than 10 Megabytes in total size. To send larger file attachments, use a POP3 mail client such as Outlook.

Attached files will show on the bottom of the message. If you wish to remove the attachment click the ( ) to the right of the file.

Sending Mail

When you have finished editing and spell checking your message and have attached any files to the message, you are now ready to send it through the Internet to the intended recipient(s).

To send your message, click the Send button.

If you wish to save your e-mail message for later editing instead of sending it, click the Save to Drafts button. This will place a complete copy of your message in your Drafts folder for later editing and sending.

To cancel sending your messages and abandon any changes you have made, click the Cancel button.

Checking your Inbox

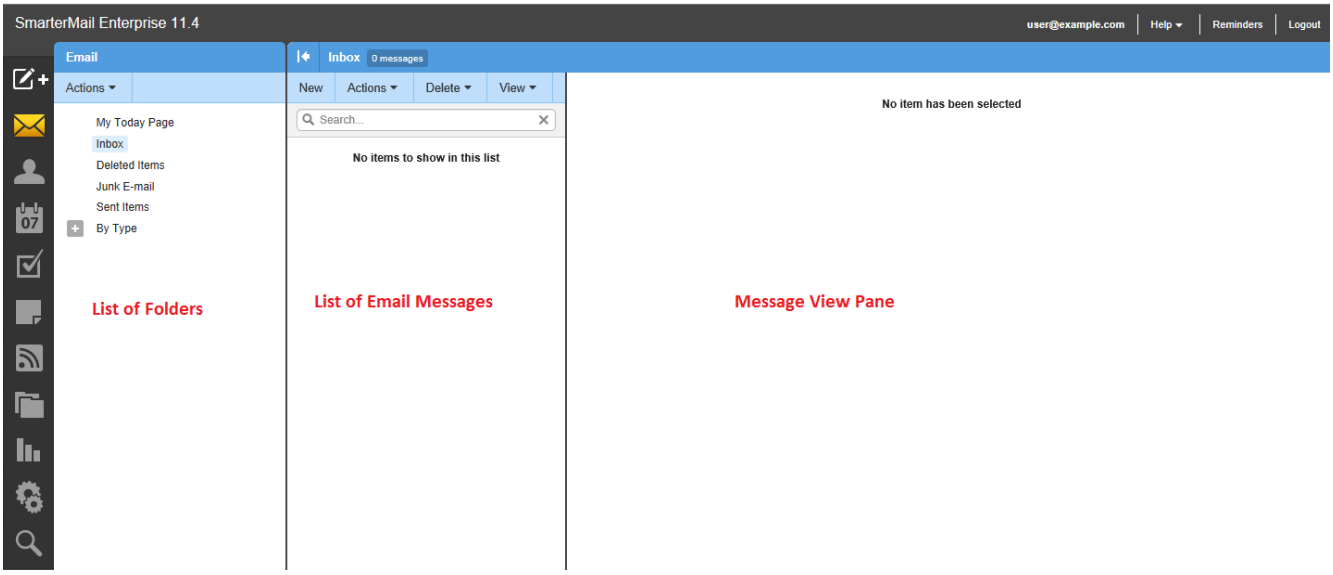


Figure 7 – The Inbox and a Displayed Message

When you first view your inbox, the first message will be selected in the list of e-mail messages and depending on your account settings, the message view pane may show the contents.

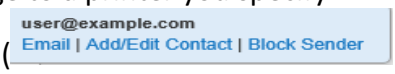
Each line represents a unique message. Information displayed about each message includes the address or name (of the sender), e-mail subject, the date and time the message was sent, and the total size of the message. E-mails are initially sorted by date and time with the newest messages being displayed at the top of the list. Messages which have not been read will appear in bold text. Messages which have been read and retained will be displayed in normal text.

Reading Email

To read an e-mail message, simply click the desired e-mail. The mouse cursor will become a pointing finger indicating that you may click the message. Once you click an e-mail message, the contents of the message will appear in the Message View Area.
Your message along with several options will be displayed in the Message View Area. Use the scrollbar on the right hand side of the screen to scroll and view the entire e-mail message, if necessary.

The Message View Area displays options relating to the message, as follows:

- Reply – Send a reply e-mail to the sender. Opens a new e-mail window and copies the current message into the message.

- Reply All – Same as Reply but sends the message to everyone who received the original message.
- Forward – Same as reply but does not add any e-mail addresses automatically to the outgoing message. This allows you to send the message to another e-mail recipient.
- Print - Allows you to print the message to a printer you specify
- Clicking the person opens a screen (

), allowing you to add the sender to your webmail address book.

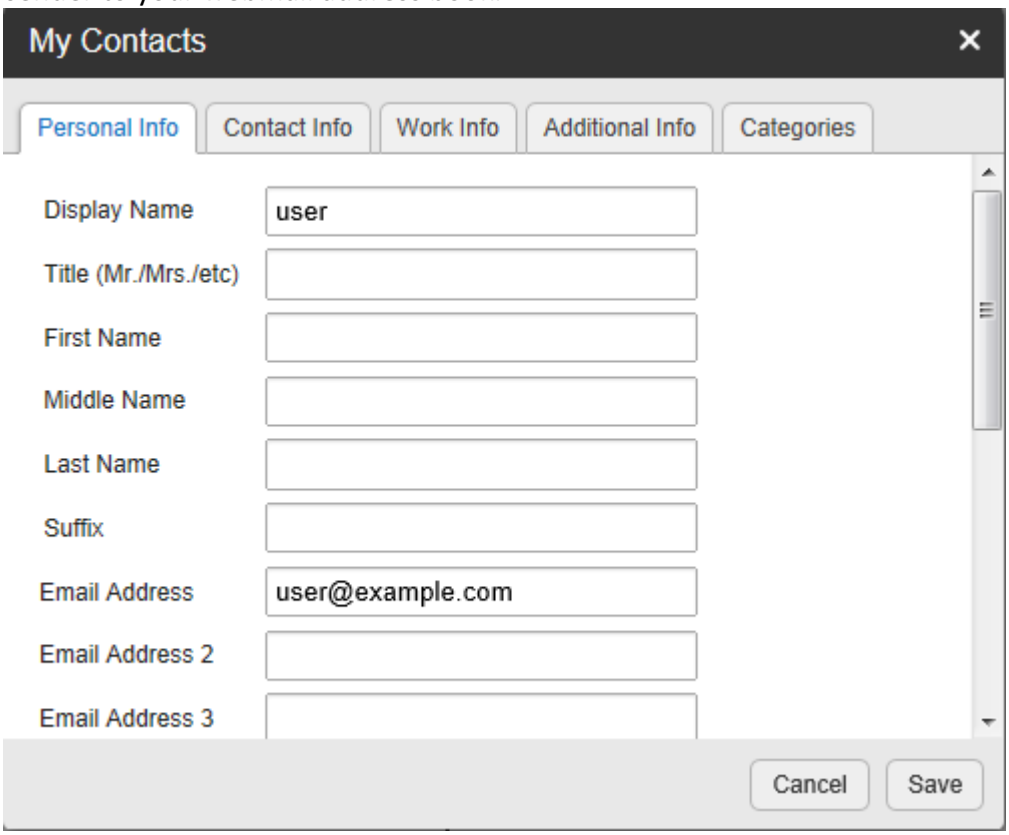


Figure 8 – Adding a Contact to Your Address Book

You can either save the contact, or cancel. Further details related to Contacts will be explained later in this manual. In order to continue working in the system, you will need to save or cancel in order to close the mini-window.

When you are done reading your e-mail message, click another mail message or use one of the Toolbar icons to start another task.

Selecting Messages

To select a message or multiple messages for deletion or filing, simply click the message and the background color of the message will change, indicating that the message has been selected. To select multiple messages, use the control key to select them individually, or use the shift key to select a range. Alternatively, you can use the checkbox next to each item to select individual items, or the checkbox above the list to select or deselect all items. You can then use an Icon such as Mark, Move, or Delete to affect all selected items.

Toolbar Icons

From left to right, the icons at the top of the screen are:

- **New** - Click this button to create a new email message.
- **Actions** - Click this button and select the appropriate option to mark messages, move messages, forward multiple messages or block/unblock senders.
- **Mark** - Click this button and select the appropriate option to mark the selected message(s) as read, unread, follow-up, no follow-up, spam, or not spam.
- **Read** - Marks the selected message(s) as read and changes the status indicator appropriately.
- **Unread** - Marks the selected message(s) as unread and changes the status indicator appropriately. This can be useful for reviewing messages at a later time.
- **Follow-up** - Marks the selected message(s) for follow-up and changes the color of the follow-up flag appropriately. Alternatively, users can click on the flag icon next the message to mark it for follow-up.
- **No follow-up** - Removes the selected message(s) as being marked for follow-up and changes the color of the follow-up flag appropriately. Alternatively, users can click on the flag icon next to a message marked for follow-up to remove the follow-up flag.
- **Spam** - Marks the message as spam and moves it to the Deleted Items folder.
- **Not Spam** - Marks the selected message(s) as not spam and automatically adds the email address to your trusted senders list.
- **Move** - Moves the selected message(s) to any available folder. *Note: You can also drag-and-drop messages to an available folder.*
- **Forward** - Forwards the selected message(s).

- **Block Sender** - Prevents the sender of the selected message(s) from sending any more messages to the account. When you block a sender, a new Internal Blocked Senders Content Filter is created. Any user you block is added to that list, and their email is, by default, deleted. You can edit the action taken for this filter, should you so desire.
- **Unblock Sender** - Allows the sender of the selected message(s) to begin sending messages to the account again by removing the address from the Internal Blocked Senders content filter.
- **Delete** - Click this button and select the appropriate option to delete, undelete, purge deleted messages, or delete all messages in a folder.
- **Delete** - Moves the selected message(s) to the Deleted Items folder.
- **Undelete** - Retrieves deleted messages from your Deleted Items folder provided the system hasn't been purged yet.
- **Purge Marked as Deleted** - Permanently deletes the messages in your Deleted Items folder.
- **Delete All Messages in Folder** - Moves all of the messages within a selected folder to the Deleted Items folder. This option takes the same action as delete, except that it will perform the delete operation on every email in the folder, regardless of whether the message is checked or not. This option is most useful in folders like Junk E-Mail or Deleted Items.

Search

Click in the search box to search in the folder selected, as seen in figure 9.

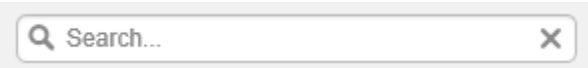


Figure 9 – The Search Bar

Contacts

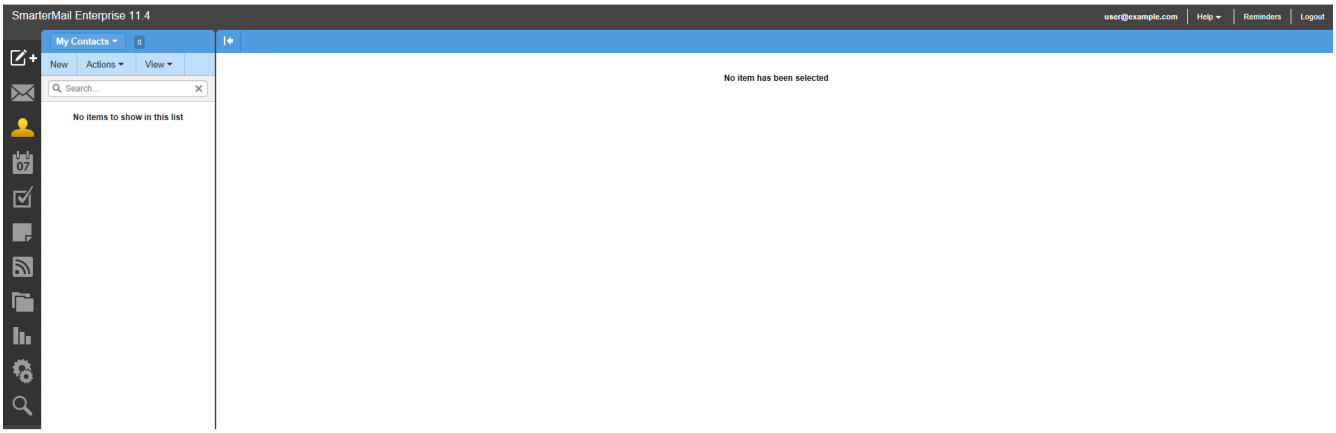


Figure 10 – The Contacts Screen

To add a new Contact, click the “New” button, which will bring up a screen similar to figure 11.

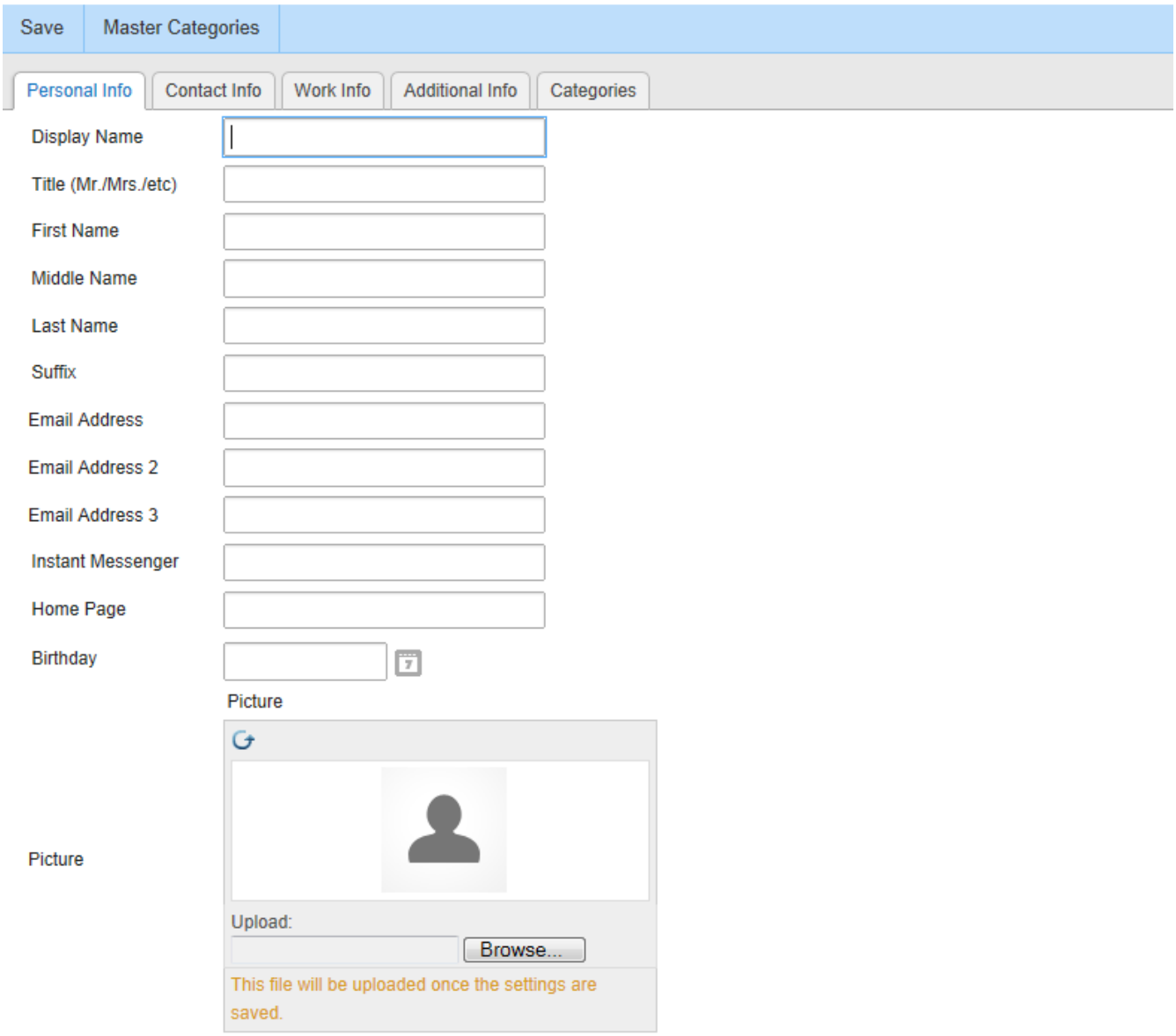


Figure 11 – The Add Contact Screen

To edit a contact's information, select the contact using the checkbox and click "Edit" in the toolbar.

To delete a contact(s), you would select the contact (or contacts) that you want to delete, and click "Actions" in the toolbar then select "Delete".

Calendar

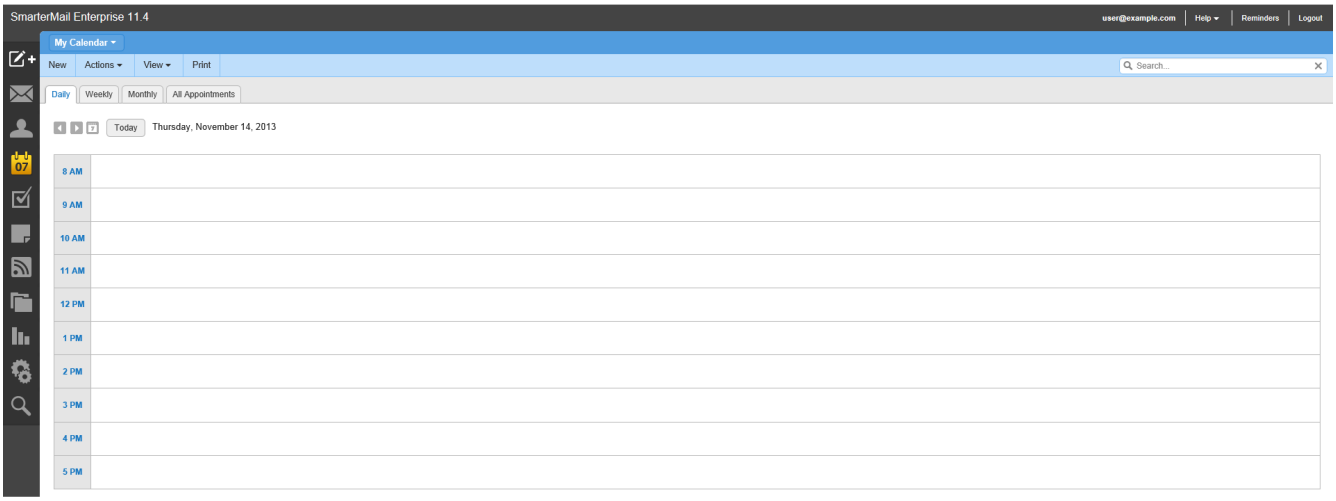


Figure 12 – The Calendar Screen

In the Calendar section, you can set-up and manage appointments in webmail. To create a new appointment, click the "New" button in the toolbar. This will cause a pop-up to appear (figure 13).

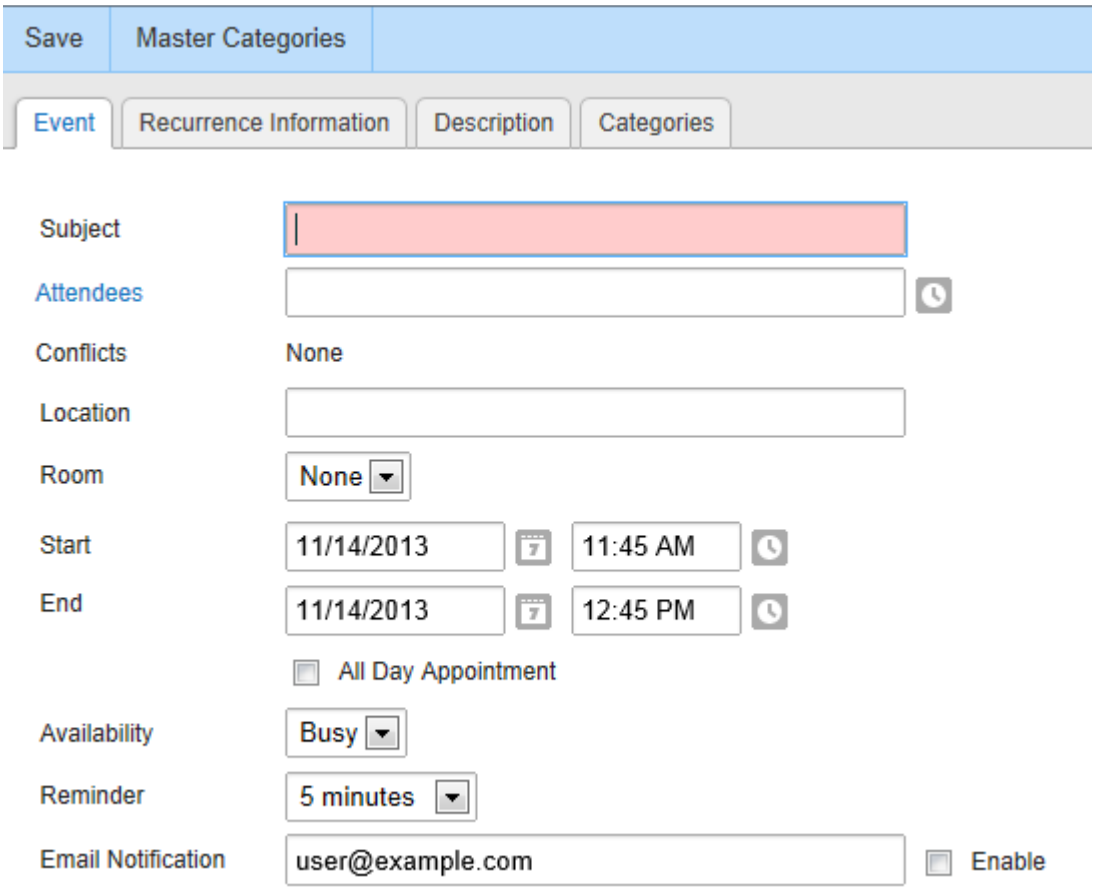


Figure 13 – The New Appointment Screen

In this window, you provide a subject, attendees, a location and time for the appointment, and can set a reminder to be sent before the appointment to any e-mail address. The Attendees can be added from your contact list in webmail, and the "Availability" box allows you to check a person's availability if they have shared their calendar and allowed you the appropriate access.

The other tabs allow you to specify how often the appointment repeats, give a description to the appointment, and assign it to one or more categories based on the "Master Categories" that you set-up. "Master Categories" are discussed in further detail later.

Tasks

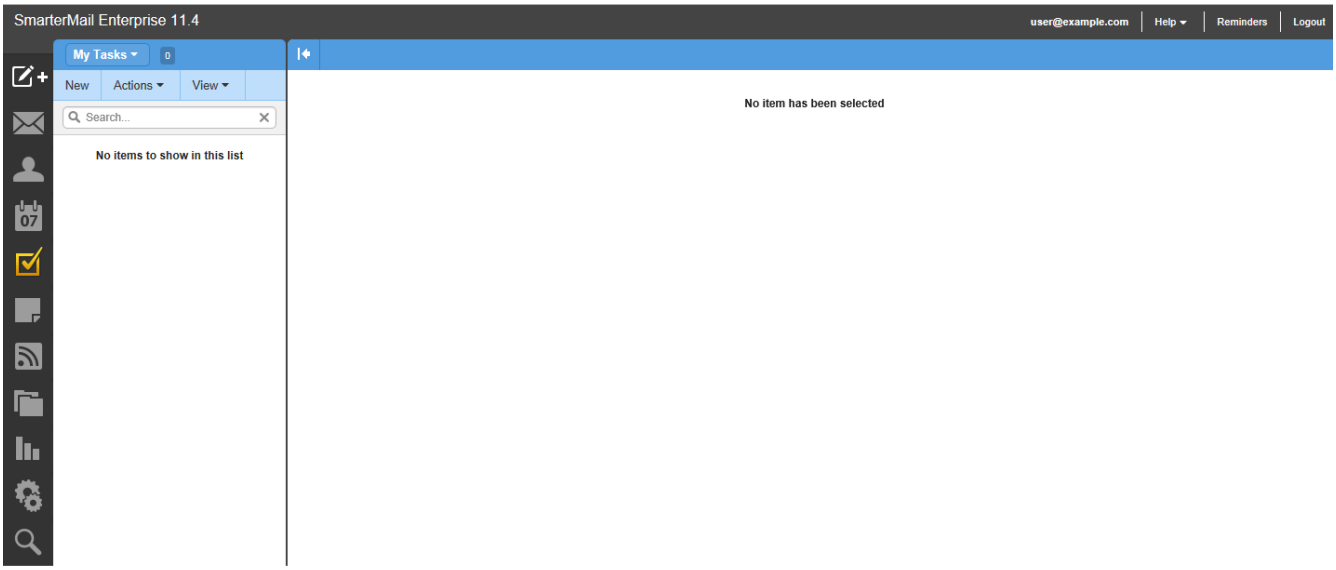


Figure 14 – The Tasks Screen

Inside the “Tasks” component, you can create tasks. When adding or editing a task, a pop-up window will show (figure 15).

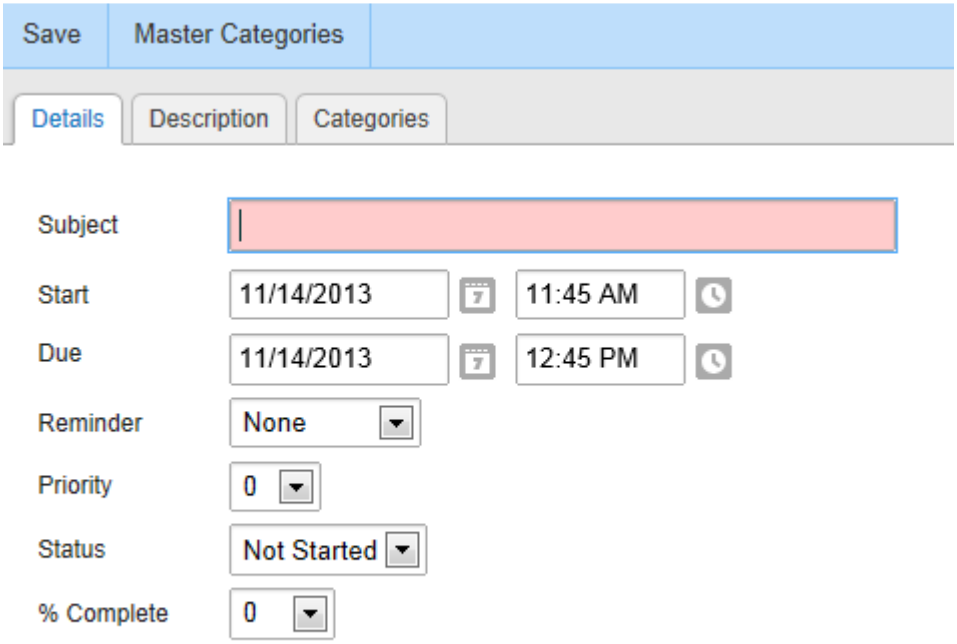


Figure 15 – The New Task Window

In this window, you specify a subject for the task, when it should be started, when it’s due, when to get a reminder, its priority, status and % complete. The description tab allows you to give further information about the task. You can also categorize it using the “Master Categories” button at the top to add named categories and the “Categories” tab to select categories from the list. “Master Categories” is discussed in further detail later.

Notes

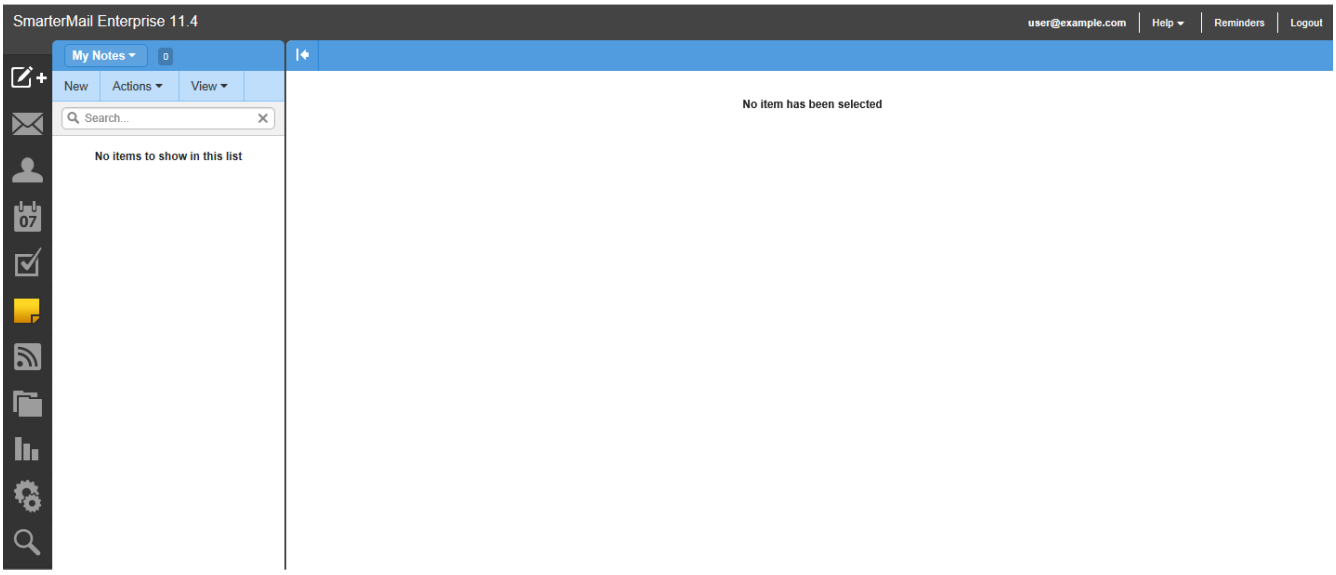


Figure 16 – The Notes Screen

The “Notes” section enables you to add personal notes. You can give different notes different colors, perhaps using each color for a different category of note. When adding or editing a note, you’ll see the screen shown in figure 17.

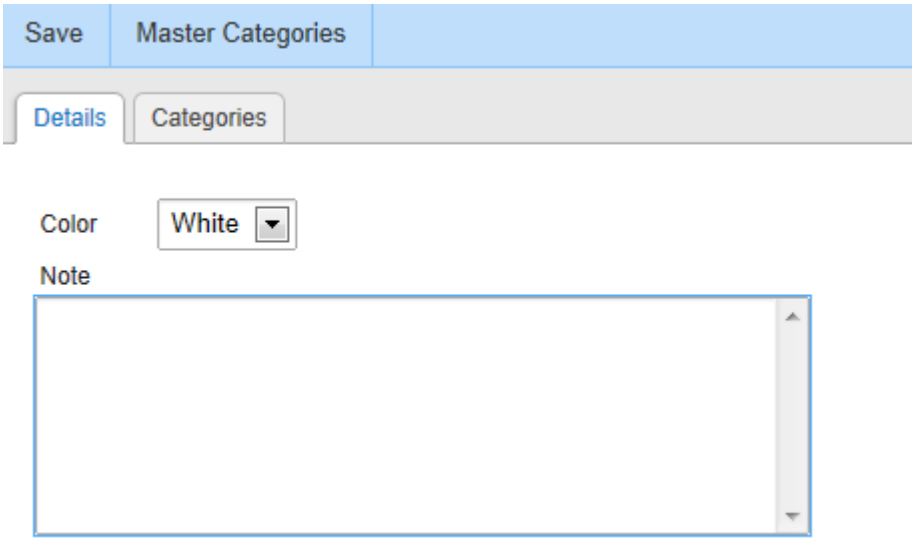


Figure 17 – The New Note Window

The Details tab allows you to enter your note and choose a color for it. The Categories tab lets you choose a category from the note, based on the Master Categories that have been set-up. “Master Categories” is discussed in further detail below.

Master Categories for Contacts, Calendar, Tasks and Notes

The “Master Categories” lets you add categories in one location to set for any item. That is, Master Categories that you add in Contacts also show in Calendars, Tasks, and Notes. You can type each category on its own line, or enter multiple categories separated by a comma.

RSS Feeds

RSS feeds allow people to automatically be notified when a website contains new posts or entries.

Actions - Click this button and select the appropriate option to create a new folder, rename a folder, or delete a selected folder. Using folders makes it easy to keep your news items organized. For example, create folders for technology items, politics, business or other categories.

File Storage

Allows users to upload files to the mail server and share them by sending out links to those files.

Actions

- **Edit** - Edits the sharing settings for the selected file.
- **Delete** - Permanently removes the selected file(s) from the server.
- **Upload** - Uploads a new file to the server.
- **Download** - Downloads the selected file(s).

Reports

The webmail system includes reports, and you can create your own reports. This is an advanced feature which is outside the scope of this document. Please refer to the online help or call the Excalibur Technology Help Desk for additional information.

My Settings

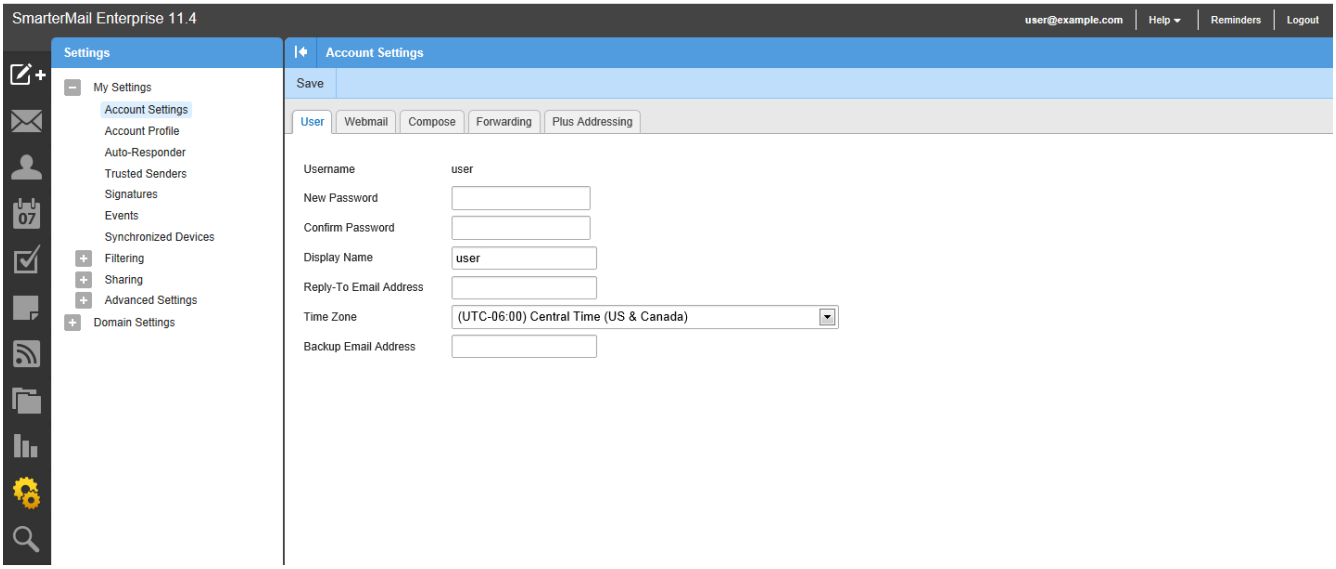


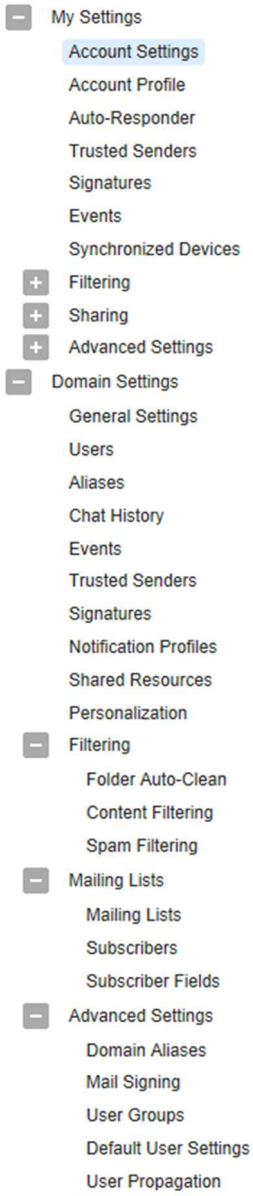
Figure 18 – The Settings Screen

The “Settings” area allows you to customize your Webmail experience.

There are two main categories, “Settings” and “Events.”

Account Settings

The Account Settings section has the following sub-sections:



User

This section allows you to change your password, display name, Reply-To e-mail address and Time Zone. It also allows you to disable greylisting. Greylisting is an anti-spam tool that pretends your mailbox is temporarily down. A spammer will not resend a message. A real e-mail server will.

Webmail

This section has various options that let you set-up defaults for your Webmail account. You can change your Initial Page to be your Inbox instead of your Today Page, change how e-mails are displayed (HTML vs. text), set sorting, Delete Action(where the message goes when delete is pressed).

Compose

This section allows you to set-up defaults related to writing (composing) new e-mails. You can change the default font used, how often the system automatically saves your e-mail draft, the Spell Check dictionary to use, and other functions.

Forwarding

This page allows you to automatically forward e-mails to another e-mail address and optionally delete them.

Plus Addressing

This feature allows you to automatically filter e-mails sent to you without creating rules. For instance, if you want to sign-up for a newsletter, you can sign-up for the newsletter with the e-mail address of user+newsletter@example.com (if your normal e-mail is user@example.com). Then, when an e-mail is sent to user+newsletter@example.com, the e-mail will be moved into a "newsletter" folder due to the +newsletter in the e-mail address. This folder will be on the same level as your Inbox folder.

You can also use backslashes in the e-mail address to further filter e-mails into subfolders. For instance, you can use user+newsletter/Excalibur@example.com to sign up for a newsletter and have the e-mail go into an Excalibur folder inside of your newsletter folder. In order to have the subfolder be inside of your inbox folder, you can use user+inbox/newsletter@example.com.

You have 3 options for what to do with the e-mail, and whether you want the feature enabled. Your 3 options are “Move to Folder,” “Move to Folder (if Exists),” and “Leave in Inbox.” “Move to Folder” will move the e-mail to the specified folder, creating the folder if necessary. “Move to Folder (if Exists)” will move the e-mail to the specified folder if it exists, or leave it in the Inbox if the folder does not exist. “Leave in Inbox” will leave the e-mail as-is.

Account Profile

The Account Profile section allows you add details about yourself. The four subsections are Personal Info, Contact Info, Company Info, and Additional Info.

- Personal Info has your Display Name, Title, Name, E-mail Address, Other E-mail Address, Instant Messenger, Home Page, and Date of Birth.
- Contact Info allows you to set-up other contact information. You can enter phone numbers, fax numbers, a pager number, and mailing/ snail-mail address.
- Company Info allows you to specify your Company Name, Job Title, Department, Office, Mailing Address, and Website.
- Additional Info allows you to provide any information that doesn’t fit elsewhere.

Auto-Responder

This section enables you to automatically send a prewritten response when an email message is received. They are commonly used to notify senders that the recipient is out of the office or on vacation.

Signature

This section enables you to create a default signature for your outgoing e-mails. Instead of typing a signature on every e-mail, you can create one here and it will be automatically used. This signature is only used on e-mails you compose in webmail. So, if you’re using Outlook or another POP3 client, you may need to create your signature there also, depending on your company policies.

Events

The "Events" section allows you to respond to various events that occur. Some events include when you receive an e-mail, when you send an e-mail, and when your disk space usage is at a certain level. When you send an e-mail, you might want to add the person you send the e-mail to your Trusted Senders list. Instead of doing so manually, you can use an event to automatically do so. You can set-up an event so that when your mailbox is getting full, you are sent a notification by e-mail to any e-mail address you select, or by using a Notification Profile. (Notification Profiles are covered earlier in this manual).

Filtering

Folder Auto-Clean

Folder Auto-Clean lets you set limits on how much of your disk space is used by your Junk E-mail, Sent Items and Deleted Items folders. By setting limits, these folders will not become full, which means your account will not become full.

- The options you have are "Use default settings" or "Override settings for this account."
- If you decide to override settings, the "Folders" tab will allow you to add rules to individual folders, and edit or delete rules you have created.
- When adding a rule, you choose the Folder to auto-clean and whether to clean it based on size or date. If you choose to clean it based on size, you specify the size before and after the auto-clean. This will allow you to keep specified folders a certain size. If you choose to clean it by date, you enter the number of days to keep an e-mail before deleting it from the specified folder. This will let you automatically remove old e-mails.

Content Filtering

Content filtering allows you to specify rules for incoming e-mails. This allows you to automatically treat e-mails based on criteria you specify, which can help your mailbox stay organized.

- The first step is to choose which criteria type(s) you want to use. These include "From Address," "Containing Word," "To Address," "Attachments," and "Other." You can choose multiple criteria in order to better organize e-mails. That is, e-mails from an individual with a specific subject can be treated one way, and e-mails from that same individual with a different subject can be treated differently, if you set-up two filters.
- After choosing your criteria type(s), you specify the value(s) to check for each criterion.
- Finally, you give your rule a name and specify an action to take. The actions include Delete Message, Bounce Message, Move Message, Prefix Subject, Add Header, Copy Message, and Reroute Message.
    - Delete message deletes the message. You'll never see it in your Inbox, and it is not recoverable, so be careful when using it.
    - Bounce message sends a response to the sender that the e-mail has been

bounced.
- The message is delivered to you unless you also choose to delete it, or if your set-up has bouncing disabled.
- Move Message moves the message to a specified folder. If you set this up and later delete the folder, the folder will be re-created when the filter matches.
- Prefix subject allows you to add text in front of the subject, which can help you find e-mails later, as they'll all have a similar subject.
- Add header adds an e-mail header to your e-mail. You will not see it unless you view the headers, but it can be useful to filtering in Outlook and other e-mail clients if you're using them.
- Copy message forwards the message to the given address and delivers it to you.
- Reroute message sends the message to the given address, but does not deliver it to you.

Spam Filtering

Spam filtering enables you to specify actions to take on possible spam.

- You can use the default settings, or override settings for your account.
- The Trusted Senders is unique to each account and can be changed regardless of the setting you choose in the Options tab. Trusted Senders can be either an e-mail address, such as user@example.com, or a domain name, such as excaltech.com. Any e-mail from those addresses will bypass spam filtering.
  - If you choose to override settings, in the Action tab, there are three spaces to fill in; based on the probability the e-mail is spam.
  - The actions you can take are "No Action," "Delete Message," "Move to Junk E-mail Folder," and "Add Text to Subject."
  - The three settings are individual, so you might decide to delete messages with a High Probability of being spam, send those with a Medium Probability to the Junk E-mail, and add text to the subject for those with a Low Probability.

Sharing

- **Shared Resources**
  Shared resources let you share your contacts, calendar, tasks, notes, and folders with other users in your domain. That way, larry@domainname.com can see the calendar for user@example.com, etc.
- To add a new shared resource, click "New". You then choose what you want to share and click "Next"
- After choosing what to share, you specify what users or groups you want to share it with,

and what access they have. The levels of access are “None,” “Read-Only,” and “Full Control” for all resources except for your calendar, which has an additional level of “Availability Only.” “Availability Only” means that the users or groups can view when you’re available and when you’re not, but cannot view your appointments.

Domain Settings

This is an advanced feature which is outside the scope of this document. Please refer to the online help or call the Excalibur Technology Help Desk for additional information.

Reminders

Clicking this link opens a pop-up window with a list of reminders. The reminders are based on events you’ve set-up in the “Calendar” and “Tasks” sections of webmail. You can snooze items for up to 3 days, dismiss all reminders, dismiss selected reminders, or close the window. You can also view reminders that you snoozed on.

Logout

This link logs you out of webmail.

Help

This page displays additional on-line help. This is useful if you are away from this copy of the manual and need immediate help.

When you click the “Help” link on any screen, you can find out more information regarding the page you’re on, browse topics, search the Online Help for more help, or close the Help prompt and continue working in the webmail system.