syncmymail™

Control Panel Manual

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1 Introduction

This guide contains detailed instructions on how to configure hosted services within Control Panel and how to set up customers and users ith those services.

It also provides helpful tips and information on how to navigate around the Control Panel user interface and use the features that Control Panel offers.

1.1. Logging on to the Control Panel User Interface

How to login to Control Panel

1. Browse to http://cp.syncmymail.com
2. Enter your User Name and Password and select Login.

   Most often the user name that you will use will be your UPN. This is usually your primary e-mail address.

   The Password field is case-sensitive.
3. Control Panel allows a user to change their password at login. Select Change Password to display the password reset feature.
4. Enter a new password that meets the system's security requirements. Re-enter the new password to verify and select Login. The new password will be saved against the user's account.

Control Panel's Security Requirements for new passwords

For the security of all users, password policies exist within Control Panel which govern the type of passwords that can be used.

A new user password must conform to the following requirements:

- Must be a minimum of 7 characters long
- Must contain 2 of the following 4 character types:
  - Lower Case (e.g. lower case)
  - Upper Case (e.g. UPPER CASE)
  - Numbers (e.g. 1, 2, 3)
  - Symbols (e.g. @, $, !)
- In addition to the above password requirements there is usually a requirement that your password cannot be too close to a password that you have already used. For example, in the past you may have a password like “Passw0rd1” and every time you changed the password you would increase the number e.g. to “Passw0rd2”. While this made it easier to remember what your password was, it is also regarded as a high security risk. The system will verify your new password to ensure that it is not a password that you have used before.

If a user name and/or password are entered incorrectly three times, the user account may become "locked out". When an account is locked out, the system will not allow the end-user to log-on even when entering the correct user name and password. The user account will unlock automatically after ten minutes at which point you can re-attempt to log-on.

If a user has forgotten their password, they must contact their System Administrator who will be able to reset it for them.

Password Expired

For the majority of users, a password will be associated with an expiration date. When the user attempts to log onto Control Panel, the system will navigate them to the Password screen where they are required to add their old password and their new password.

The Change Password screen can be accessed using the "Change Password" icon on the Control Panel Menu bar.

Multiple Language Options

On the Control Panel Login screen, an additional field called "Language" may appear if the Control Panel system has been configured to support multiple languages. The default language is normally configured to English.

To select a different language, select the language drop down list and select the required language. Only languages that have been configured within Control Panel will appear in the drop down list. The selected language will be remembered next time the user logs onto Control Panel using the the same computer.

1.2. Navigating around the Control Panel User Interface

The Control Panel User Interface is made up of different web pages that relate to specific functions and services. The availability of these pages are dependent on the end-user's security permissions and the services that have been provisioned to the user or customer.

Icon	Description
	Home: Navigates the user back to the Home Page
	Customer Management: Allows the user to complete customer management tasks including: New Customer; Edit Customer; View Customer Hierarchy
	User Management: Allows the user to complete user management tasks including: New User; Edit User, Bulk User Import; Manage Locations & Departments
	Services: Allow Service Administrators to complete service related admin tasks including: Exchange - Manage distribution groups / contacts / public folders; Citrix Application Groups; Security Groups
	Reporting: All users to request and view available Reports. The availability of the reports will be dependent on the user's security permissions
	Operational Support: Allow Administrators to configure specific system settings including: Branding & Content Management; Services, Web Services & Servers, User Security Permissions
	Help: This icon links to your Service Provider's Support Site.
	Change Password: Allows the user to change their password.
	Logout: Will close the user's Control Panel session and navigate to the Control Panel Logon page.

1.3. Provisioning Status Indicator

The Provisioning Status Indicator allows users to monitor the progress of their individual provisioning requests.

Some provisioning requests can take a considerable amount of time to change from one status to another due to:

- the complexity of the request
- the number of requests that the system is processing

Status Descriptions:

Status	
	Not Provisioned Item has a) never been provisioned or b) has been de-provisioned.
	Queued Request submitted to the Provisioning Engine. Item has been queued for provisioning or de-provisioning.
	Provisioning In Progress The provisioning engine is working on the request.
	Provisioned Item successfully provisioned.
	Pending Changes Item requires further configuration before it can be provisioned. This status can appear when copying an existing user's services.
	Provisioning Failed An error occurred while processing the provisioning request. Select the item to view it's configuration properties and the provisioning error description.

1.4. Types of Users

Control Panel supports different user security access levels. These security access levels are linked to different icons, allowing easy identification of a user's role when reviewing a list of users.

User Descriptions:

User Icon	Description
	Enabled User Includes Standard User / Partial User Administrator / Partial Service Administrator.
	Customer Service Administrator Full Service Administrator.
	Customer User Administrator Full User Administrator.

	Customer User and Service Administrator These users have Full User and Full Service Administration security rights. When a new customer is created, the first user added to the customer will automatically inherit this role.
	Account Disabled The user role has been disabled and the user can no longer log onto the system or hosted services. The user's services remain provisioned to the user's account.
	Account Expired The user's system account has expired and the user can no longer log onto the system or hosted services. The user's services remain provisioned to the user's account.
	Remote Active Directory User The user's details, including password, are saved and managed on a remote Active Directory Forest. The user's password cannot be updated on the Control Panel user interface.

2 User Management

The Users screen displays all users within a selected organization. To navigate to the Users screen, select the User Management icon on the Control Panel Menu Bar.

Users that have been assigned with the User Administrator role will be able to access the web pages. A Partial User Administrator role also exists which has restricted access to some of the user functions.

Within User Management, the following features can be used:

- Add a New User
- Export all users' information
- Import a group of new users / existing users from Microsoft Excel
- Amend existing users details
- Apply a change to multiple users

Users are sorted in alphabetical order using the UPN Name.

The "Users" table can be filtered using specific filter criteria. The "Advanced User Search" allows the end-user to search for a specific user.

When a user is selected, a new iframe will appear for the user displaying the available user functions and the current status of the user's account.

Key to User Service Symbols:

Symbol	Description
	Number of Services that have been provisioned to a user. If selected, Control Panel will navigate directly to the Provision User Services screen for that specific user.

	Drop down information bar. If selected, all services provisioned to that user will be listed. If a service is selected, Control Panel will navigate to the service's User Set-up iframe for the user where the service properties can be viewed.
	No services provisioned to the user.
	Service Provisioning Error has occurred and is outstanding. Select the icon to display the impacted service. Select the Service to navigate to the service's User Set-up iframe to view the Provisioning Error title and description.

2.1. User Functions

The User Functions screen allows the end user to perform user specific actions on a specified user.

To access User Functions screen

1. Select the User Management icon on the Control Panel Menu Bar and select "Users".
2. Select the required user, the User Functions screen will appear.

The following user functions are available:

Function	Description
Services	Manage and configure the user's services.
Edit User	Amend user's properties (User details, Email Addresses & Account Settings)
Disable / Enable	Disables the user's account. If a user is disabled, Enable function will be displayed.
Impersonate	Impersonate an user and navigate through Control Panel as that user.
Delete	Deletes the user's account from the system.
Copy User	Creates a new user, using an existing user's details, including the user's configured services as a base input.
De-Provision	User will no longer be able to use the services.
Provision	Provisions the user with Control Panel, the user will become fully enabled.

Generic information regarding the user's account will appear under the "Account Status" section.

2.1.1. Disable / Enable

Disabling a User

1. Navigate to the customer's Users page.
2. Select the user to display the available user functions.
3. Select "Disable". The user will become disabled and will appear with a <> icon on the Users screen.

When the user is disabled, they will not be able to access any of the services that have been provisioned to their user account and will not be able to log-on to the Control Panel system.

The user's services cannot not be managed by a User Administrator whilst the user is disabled.

Enabling a User

When a user has been disabled, the disable option will be replaced with "Enable" on the User Functions screen.

1. Navigate to the customer's Users page.
2. Select the user to display the available user functions.

3. Select "Enable". The user's account will become enabled again. The user will be able to access all the services that have been provisioned to the user account and log onto the Control Panel system.

2.1.2. Delete

The Delete function will permanently remove the user from Control Panel user interface.

To delete a user from the Control Panel system, the user status must be de-provisioned. The delete function will not be available until the user is de-provisioned.

1. Navigate to the customer's Users page.
2. Select the user to display the available user functions.
3. Select "Delete".
4. The system will verify that "you want to delete this user?". Select Yes . The user will be deleted from the Users screen.

Note:
If only one user exists within a customer/organization, the "delete" function will remain disabled even when the user's status is de-provisioned.

2.1.3. De-provision

Warning!!

The de-provision function will delete the user's account and remove the user from all of it's provisioned services. User information such as the user's Exchange mailbox will be permanently deleted.

1. Navigate to the customer's Users page.
2. Select the user to display the available user functions.
3. Select "De-Provision".
4. The system will verify that "Do you want to de-provision this user?". Select "Yes". The user will no longer be able to use any of its provisioned services or be able to log onto the Control Panel interface.

The user's provisioning status on Control Panel will change to grey (de-provisioned). To remove the user completely from the system, select the "Delete" function.
Once a user is de-provisioned, the only user functions available to manage this user are: Edit / Delete / Provision.

A de-provisioned user's details can be used to copy and create a new user.

De-provisioning a User versus Disabling a User

De-provisioning a user may appear similar to disabling a user however it is NOT, with two very important differences:

- Disabling a User disables the user’s Active Directory account whereas de-provisioning a user deletes the user’s Active Directory account.
- Disabling a user does not remove any services from the user whereas de-provisioning permanently removes all services from the user

***** If in doubt, do not de-provision! *****

2.1.4. Edit User

To amend an existing user's details, the "Edit User" function should be used.

This function should be used when a User Administrator needs to reset a user's password or unlock their user account.

1. Navigate to the customer's Users page.
2. Select the user to display the available user functions.
3. Select "Edit User".
4. The User Properties are displayed. Make the necessary changes.

User Details

UPN - The user's User Principal Name. Can be used for logging onto the different systems.

Username - cannot be edited after the user is created.

First Name - User's first name

Last Name - User's surname

Display Name - The user's display name. This will be displayed within Control Panel and provisioned services

Additional User Properties - Select the link to edit other user properties including the user's address, telephone contact numbers, organizational information.

Password Reset

The user's password can be reset to a new password if they have forgotten their old password.

Account Settings

Under "Account Settings", the user's account setup can be changed. If the user has locked themselves out of the Control Panel system, the User Administrator can unlock the account by enabling the "No" radio button for "Account Locked".

Any security changes to the user's account can made by selecting "Advanced Options" with additional roles being added to the existing user's profile.

Email Addresses

Additional email addresses can be added or removed from the user.

Remember to select "Update" to save the email changes before selecting "Provision".

5. Select "Provision' to save the changes.

2.1.5. Impersonate

Impersonating a user, allows you to see what the user can access / view within the Control Panel user interface. It is a good tool to use when troubleshooting an end-user's system problem. To impersonate another user, you must have Full User Administrator security rights.

1. Navigate to the customer's Users page.
2. Select the user to display the available user functions.
3. Select "Impersonate".

   The impersonation will take immediate effect and the Control Panel system will navigate directly to the Home Page for the impersonated user. The Control Panel screen will display the impersonation details on the top right, between the Control Panel Menu Bar and the main window.

   To return to your own user account, select your Display Name or select the logout icon on the Control Panel Menu Bar. Control Panel will navigate back to the web page that you were at before you impersonated the user.

Note:

When impersonating a user, you cannot impersonate another user. This is true even if the user that you are impersonating has the right to impersonate users.

2.1.6. Copy User

The Copy User function allows Full User Administrators to create new users using an existing user's profile. The default details that are copied from the original user are user account settings and the configuration of services.

1. Navigate to the customer's Users page.
2. Select the user that you want to copy to your new user.
3. Select "Copy User".
4. The New User wizard will appear under the original's user name.

   Under "Account Settings" the account and security configurations that are set on the original user's profile, will appear on the new user's account. These settings can be overridden.
5. A new section called "Copy Services" will appear, displaying the services that the original user is already provisioned to.
6. Enter the new user's details
7. Under the heading "Copy Services", de-select any services that you do not want to be provisioned to the new user.
8. Select "Provision" to save the changes. The user and the selected services will be provisioned.

For some services (e.g. SQL Hosting), additional configuration is required and the service will appear on the User Services screen with a blue provisioning status. These services need to be manually provisioned before the user can access them.

Note:

- When provisioning Hosted Exchange to a new user via Copy User function, the primary email address will default to the new user's
- If populated, the values in additional user properties "Title" and "Web Page" will be copied across to the new user.

2.1.7. Provision

Provisioning an existing user

The "Provision" function allows an enabled user and its associated services to be re-provisioned. In most cases, this function is used:

- if something is not working as expected for the user.
- to ensure that the user has been provisioned correctly.

A disabled user can be re-provisioned, but will remain disabled until the "Enable" function is selected.

1. Navigate to the customer's Users page.
2. Select the user that you want to copy to your new user.
3. Select "Provision". The user and it's attached services will be re-provisioned.

Provisioning a de-provisioned user

Provisioning a de-provisioned user can be done by:

- The "Edit User" function

- The "Provision" function

For both functions, the "Password Reset" section will be fully expanded and a new password must be specified before selecting "Provision".
The re-provisioned user will not be assigned to any services.

2.1.8. Account Status

The Account Status section displays information about the user’s account and password status.

The data displayed is cached and any recent changes to the user may not be reflected on the screen immediately. Selecting will query the user's current account status and re-display it.

Account Locked:

"Account Locked" is displayed when the user's account is locked. If a user has had three failed attempts at logging on to Control Panel, their account will become locked. To unlock an account, select "Edit User" and reset the Account Locked settings under "Account Settings".

The user account will unlock automatically after ten minutes at which point the user can re-attempt to log on.

Password Expiry Date:

Displays the user's password expiry date when the expiry date has been met. The first time that the user attempts to log on to the system after the expiry date has passed, Control Panel will request a Change of Password

Account Expiry Date:

Displays the account expiry date at all times if the user has been set up with an account that has a defined end date. When the date has been passed, the user will not be able to log on to Control Panel and their provisioned hosted services.

2.2 User Services Management

Provision a User to a Service

1. Select the User Management icon on the Control Panel Menu Bar and select menu option “Users”. All users listed in your selected customer will be displayed.
2. Select the required User.
3. Select the “Services” function. The “User Services” screen will appear. All services that have been configured and enabled to the selected customer will appear.

   There is one exception, the DNS service which is a customer only service and no users can be provisioned to this service.
4. Select the required service and configure the user's service settings.
5. Selecting “Service Settings” will display the advanced service properties for that particular service. These properties will vary between the different services and for some simple services, no properties may exist.
6. Select “Provision” to add the user to the service. The user will be provisioned with the service and will be able to access the hosted application.

Additional menu options may appear on the user's Control Panel Menu Bar that relate to the provisioned service.

Services cannot be provisioned to a user when the user has been disabled or de-provisioned.

De-provision a User from a Service

The "User Services" screen is also used to de-provision an user from a service.

1. Select the required service. The service's provision statues will be green (Provisioned).
2. Select "Deprovision". The provisioning icon's status for the service will change to grey (De-provisioned).

   The user will be de-provisioned from the service and will no longer be able to access the hosted application.

   Any Service menu options that were related to the service will be removed from the Control Panel Menu Bar when the user re-enters the Control Panel user interface.

Further information on provisioning users to specific services

For simple services, selecting "Provision" will set up the user with access to that specific service. Other services require additional information to be selected.

To view what additional information is needed before a particular service can be provisioned to a user, click on one of the links below:

BlackBerry
CRM
CRM 4.0
Exchange
File Sharing
Office Communications Server 2007
SharePoint
Windows Web Hosting

2.2.1. Exchange

Hosted Exchange Service manages the exchange environment for your company. Users are able to access their email using the advanced email and collaboration services that are available in Microsoft Exchange.

Control Panel supports Microsoft Hosted Exchange Servers 2003 and 2007.

Exchange packages are controlled by Service Access Levels.

The maintenance of the server and environment is done for you by your Service Provider.

Add Exchange Service to a User

1. Select the User Management icon from the Control Panel Menu Bar and select menu option "Users". The users screen will appear.
2. Select the user that you want to provision Exchange to.
3. Select "Services".
4. Select Hosted Exchange Service.

5. Select the required Service Access Level (SAL). The Service Access Level will determine the Exchange package that will be allocated to the user. Service Access Level's configurations are created and managed by your Service Provider.

If appears beside a Service Access Level, the maximum number of users that can be assigned to the level has been met. No additional users can be assigned to that Service Access Level.

Overriding the Default Inbox Limit (MB)

Your Service Provider may have provided you with access to override the default package setting - Inbox Limit (MB) so that mailbox limits can be set for individual users:

- Select the Service Access Level.
- Tick property " Inbox Limit (MB)" and amend the value.
- Select "Apply Changes".

6. Select the type of Reply email address for the user.

   If System e-mail address is selected, a drop down list will become activated and display the user's primary email address and if selected, all customer enforced email addresses that have been assigned to the user. Select one email address from the list.

   If Custom e-mail address is selected, the primary email address becomes editable and any customised email address can be entered.

7. The Control Panel Control Panels supports the administration of advanced Exchange features (add to distribution lists; mail forwarding & manage mailbox rights).

   To configure these advanced features, click on "Advanced Options".

8. To hide the user's details from the published Global Address List, select "Service Settings", enable the "Hide From Address" property and add a tick.
9. Select "Apply Changes" to save the change.
10. Select "Provision" to apply the Exchange service to the user.

Advanced Exchange Settings for a User

The Advanced Option feature on the User Exchange Service iframe, allows the Administrator to:

- Assign users to Distribution Groups.
- Set up email forwarding, where all mail will be forward to another email account.
- Manage Mailbox rights (permissions), by allocating multiple users to view and manage the user's mailbox within Outlook.

Distribution Groups

The distribution groups feature allows the administrator to assign the user to existing Distribution Groups. The user can be assigned to multiple Distribution Groups.

1. Select folder tab "Distribution Groups".
2. The Control Panel Control Panel will display all of the customer's distribution groups (including non-mail enabled groups). Check the distribution groups that the user will become a member.

3. To remove a user from a distribution group, un-check the selected group.
4. All Distribution Group changes will be saved when "Provision" is selected.

Email Forwarding

The email forwarding feature allows the administrator to define a mailbox that all incoming mail should be automatically forwarded to. This feature may used when the user's name has changed and directing all email to the users new email account.

Only one email forwarding address can be saved on the original users's profile.

The Control Panel Control Panel ensures that only email-enabled objects can be set up as a forwarding address.

1. Select folder tab "Email Forwarding"
2. Search for the proposed email account by adding the first characters of the user's name in the Forward Member field. To complete a "wildcard" search and retrieve all of the customer's email-enabled objects (Users / Contacts / Distribution Groups & Public Folders), leave the Forward Member field blank.

   Select "Find".
3. Control Panel will display the results from the Forward Member search and will list the mail-enabled objects and their email addresses.
4. Select the required forwarding email address, only one object can be selected at any time.
5. If there is a requirement to save a copy of all forwarded emails in the original user's mailbox, enable "Deliver message to both forwarding address and mailbox".
6. All Forwarding Address changes will be saved when "Provision" is selected.

Exchange Mailbox Permissions

The Control Panel Control Panel allows User Administrators to configure users with various mailbox permissions.

The mailbox permissions that can be assigned to a user are:

- Full Permission - The delegated user can open and read the original user's mailbox. Send As permissions are not automatically applied. Any mail that is managed by the delegated user (send reply / forward mail) will have the delegated user's details populated in the "From Recipient" field.

- Send As - The delegated user can send out mail with the original user's mail details appearing in the "From Recipient" field. From the target audience's perspective, it will appear that the email has come direct from the original user and any responses will be sent direct to that user's inbox.

- Receive As - on it's own, this permission will not allow a user to enter the designated mailbox and take delivery of incoming mail. The permission is normally applied to a user, where the delegated user will log onto a mailbox using a custom application.

Multiple permissions can be assigned to a user at any given point of time.

1. Select folder tab "Mailbox Permissions".
2. Enable the mailbox security permissions that are to be applied to a delegated user(s).
3. Select "Find" to search for mail enabled users.
4. Select the user(s) that are to be assigned with the permissions. Select "Add".
5. The selected users will be granted the additional mailbox permissions when "Provision" is selected.

To add an additional permission to an existing delegated user, enable the permission and re-select the user in the Member Search feature. The user will be updated with the additional mailbox permission.

To remove a mailbox permission from a user, you must remove all permissions from the user, by enabling the user and selecting "Remove".

Troubleshooting

An online error message that may arise when adding new mailbox rights:

"Unable to retrieve the mailbox owner permissions.

Server was unable to process request. ---> Could not find the AD object '<reference number>' using the sAmAccountName. ---> Object reference not set to an instance of an object."

This error can appear when navigating to the Mailbox Rights tab. The existing mailbox owner has been removed from the Active Directory and no longer exists. It is recommended that you removed the entry from the table using the "Remove" function. You can continue to add and provision new owners to the mailbox.

Exchange User Summary

Once a user has been provisioned with Exchange, they will be able to view their user information on Control Panel to assist with configuring Outlook and mobile devices.

1. Click on the Services icon on the Control Panel Menu Bar and select menu options "Exchange" >> "Summary".

E-mail Addresses

The user's email addresses will be listed. Their primary email address will be display in bold font.

Outlook Web Access – https://owa.syncmymail.com

Outlook Web Access allows users to send and receive emails via a web browser. This is useful when the user is frequently out of the office i.e. working from home, traveling. Control Panel displays the fully qualified URL which will point to the Outlook Web Access server.

Outlook Mobile Access

Control Panel displays the URL that points to the Outlook Mobile Access server.

Entourage 2008 Settings

Entourage is an email client and personal information manager developed by Microsoft for Mac OS 8.5 and higher users. Control Panel displays the user settings for using Entourage 2008.

Windows Mobile 5 Device and Pocket PC 2003 Settings

The configuration details for setting up a user's PDA with exchange are displayed. By selecting "Configure my device", detailed user notes on how to configure PDA are available.

iPhone Profile Setup

Downloads the user's iPhone profile onto their desktop.

Outlook Download Profile

To set up a user with Exchange, there are options that need to be specified within the user’s Outlook Profile. This settings ensure that the user connects to the correct Exchange Server or uses the right address for the http:// connection.

The user's Outlook Profile needs to be updated on the computer that they use. In environments where Exchange is not hosted, these settings are usually updated by an experienced system administrator, with a good working knowledge of the exchange environment.

However as your Exchange service is hosted, the Control Panel user interface will generate and download the settings automatically onto the end user's computer.

Customer Service Administrators can impersonate a provisioned user and configure the exchange settings to the user's client machine on their behalf.

AutoLogon Tool

This is an optional tool that can be downloaded onto the user's computer. The user's username and password is encrypted and stored in the registry. Whenever the Outlook application starts the Autologon tool logs the user onto the Exchange Server.

Downloading a user's Outlook Profile File

1. Select the Services icon on the Control Panel Menu Bar and select menu options "Exchange" >> "Outlook Configuration".
2. Select the connection protocol and cached mode for the user.

   A connection protocol is a specific method that your Outlook application will use to connect to the Exchange server. The number of connection protocols that are available for you to use will be dependent on the Exchange user package that you have been assigned with.

   The Exchange Cached Mode takes a copy of your mailbox and stores it on your local computer. This copied mailbox is updated regularly with the exchange mail server. If the connection from your local computer and the mail server stops, you will still be able to access the data that has been copied over.
3. Under the option "Outlook Profile Setup", select "Download".

   The "PRF Only" option allows the user to view their specific Outlook setting in technical detail. Using this option, the user requires access to the computer's command prompt.
4. Select "Run".
5. Select "Run".
6. The Control Panel AutoLogon for Microsoft Outlook Setup Wizard will appear on screen. Select "Next".
7. The set-up tool will default with Auto-Logon selected for install. De-select the Auto-Logon tool if you do not want the tool to be installed with the Outlook Profile File and select "Next".
8. Enter and confirm the user's password and select "Next".
9. The set-up tool will confirm the folder settings where the program's shortcuts will be saved. Select "Next" to accept the changes or "Browse" to amend the folder details.
10. The Wizard will confirm the set-up settings. Select "Install".
11. The Wizard will install the Exchange Profile and start the Outlook application. Click "Finish" to exit the wizard.

    If Auto-Logon was installed, a icon will appear in the bottom right hand corner of the desktop.

Setting delegated user permissions in Outlook

Granting "Full Mailbox Access" to a user does not mean that user can send emails (send on behalf) from that mailstore. Additional permissions need to be granted to the delegated user.

There are two ways that additional mailbox permissions can be applied to a user:

- Via Outlook, individual users can set specific mailbox permissions to other users.
- Via Active Directory Users and Computers, contact your Service Provider to set the required permissions.

Setting mailbox permissions via Outlook

1. Start Outlook.
2. Select Tools.
3. Select Options.
4. Select the "Delegates" tab and click on Add.
5. All objects that exist with the user's Global Address List will appear. Select and add the user(s) that are to be granted with a specific mailbox permissions. Select OK.
6. Grant the permissions to the user(s). To allow a delegated user to send emails from the mailbox, the permissions should be set to either "Author" or "Editor" for "Inbox" permissions.
7. Select OK.
8. Select OK to close the "Options" dialog. The delegated user can now send and reply to e-mails that are in the original user's mailbox.

Configuring to another user's mailbox in Outlook

After a user has been assigned with delegated mailbox rights, they need to configure the mailbox to their own Outlook account.

1. Start Outlook.
2. Select "Tools".
3. Select "Options".
4. Select the "Mail Setup" tab and click on Email Accounts.
5. Select "Change...".
6. Select "More Settings" and click on the "Advanced Tab". Select "Add..".
7. Enter the mailbox's User Name. Select "OK".
8. Select "OK", Outlook may display a warning message that states that you must log-out of Outlook for the changes to take effect. The user's Outlook Folder List will be updated with the user's mailbox.

   Select "Next >" to capture all changes.
9. Select "Finish".
10. Select "Close".
11. Select "OK". The mailbox has been added to the user's Outlook account and the delegated user should now be able to manage all e-mails in the selected user's mailbox.

    If there are problems with managing / sending e-mails, verify that the correct email permissions have been applied to your user account.

Configuring Outlook - "From Button"

In order for a user to "Send As' another user, their Outlook profile must be configured to show a From: button. By default, Outlook does not show the From: button.

In order to configure a user's Outlook profile to show the From: button:

1. Log-on to Outlook
2. Select "Options"
3. Select "Show From"
4. The user's Outlook screen will be updated, displaying the From: button

2.2.2. BlackBerry

SyncMyMail allows you to enable a BlackBerry device to access your Hosted Exchange mailbox.

Note
Before you can provision BlackBerry to a user you must have provisioned Hosted Exchange to the user.

Add BlackBerry Service to a User

1. Select the User Management icon on the Control Panel Menu Bar and select menu option “Users”. All users listed in your selected customer will be displayed.
2. Select the required User.
3. Select the “Services” function.
4. Select the “BlackBerry” service to configure the user’s service settings.
5. Enable the required Service Access Level. The service access level determines where the user’s BlackBerry will be saved in the Hosted environment.
6. Select the required IT Policy from the drop down list.
7. Enter the handheld PIN number for the end-user’s device. This is a eight character PIN.
8. Enter a password that the user will use to activate their device. Confirm the password.
9. Optional, enter a time period for the activation password to remain valid (1 - 720 hours).
10. Select “Provision”.

Depending on the configured BlackBerry service settings, an email may be sent to the user, advising them of their email address, activation password and when the password will expire.

Provisioned User's BlackBerry details

After a User has been provisioned with BlackBerry Service, the customer's User Administrator can select and manage the user's BlackBerry account.

Request a Device Wipeout

1. Select Kill Handheld
2. Select "Provision" to complete the device wipeout. The BlackBerry service will remain provisioned to the user.

Amend User's BlackBerry Account Settings

1. **Clear PIN:** If selected, the user will no longer be able to access emails using the handheld device.
2. **Clear Statistics:** If selected, the user's BlackBerry Information is deleted from the BlackBerry Enterprise Server.
3. **Clear Filters:** If selected, the user defined filters will be removed from the user's BlackBerry Account.

4. Select "Provision" to capture any amendments to the account settings.

BlackBerry User Information

1. Select "BlackBerry User Information" lick. The user's current BlackBerry information is listed.

2.2.3. CRM

Customer Relationship Management provides the end-user with the tools to create and manage a customer database. It supports and can enhance the sales, marketing and customer service processes that are required to support customers.

The service delivers a fast, flexible solution that drives consistent, measurable improvements in every business process, enabling closer relationships with customers and helping to achieve new levels of profitability.

Control Panel supports CRM by adding and managing user profiles onto the system.

Control Panel supports CRM versions 3.0 & 4.0 .

CRM 3

Add CRM 3 Service to a User

1. Select the User Management icon on the Control Panel Menu Bar and select menu option "Users". All users listed in your selected customer will be displayed.
2. Select the required User.
3. Select the "Services" function.
4. Select CRM Service to configure the user's service settings.
5. Enable Service Access Level – "Full".
6. Select the "Business Unit" that the user will be added to from the drop down list.

   The configuration of Business Units is managed in CRM. A user can only be assigned to one Business Unit.

   Once the user is provisioned with CRM, the Business Unit can not be amended in Control Panel. This rule still applies after the user has been de-provisioned from CRM on Control Panel as the CRM user account has become disabled on CRM for auditing purposes.

   A user's Business Unit can be amended in CRM by authorised System Administrator.
7. The "Security Roles" table will be populated with all security roles that have been configured a) to the selected Business Unit and b) made available for selection by your Service Provider.

   A user can be provisioned to multi security roles in CRM. Use the right hand scroll bar to view and select the user's CRM security role(s).

   The security role for a user can be amended after the user is provisioned with CRM. De-select and select the new role and select to save the changes.
8. Select the "Site" to which the user will belong to. This field is optional and will default to "None" when no site is selected.

   A user can only be assigned to one site.The user's site can be amended after the user is provisioned with CRM.
9. Select the "Team" that the user will belong to. This field is optional.

   A User can be provisioned to multi teams in CRM. Use the right hand scroll bar to view and select the CRM Teams. The assigned Team can be amended after the user is provisioned with CRM.

10. Select “Provision”. The user will be provisioned with CRM and assigned with a CRM licence.

TroubleShooting

The following error Messages that may arise when provisioning a user with CRM:

"Failed to Create / Update User. The maximum number of user licences has been reached"

This error can appear after "Provision" is selected. The user cannot be enabled on CRM as all CRM user licences have been assigned to users. De-provisioning a user from CRM will "release" a licence.

"Code: 0x80042f09. Description: The user has not been granted any licences or the user has not been assigned any roles.. Type: Platform. Failed to retrieve the business units"

The above error can appear after select the CRM service. The Business Unit Table will not be populated with any information from CRM. This error due to insufficient credentials saved on the CRM web service. Contact your Service Provider to update the web service.

Disable CRM 3 Service for a User

Once a user has been added to the CRM system, it cannot be removed. This is due to CRM's auditing system, where it tracks all contacts that have been made to a customer, including who completed the transaction.

Control Panel allows the end-user to de-provision users from the CRM service, removing the user from the assigned CRM licence and disabling the user account on the CRM server. The CRM user account will not be deleted from the server, even when the user has been deleted off the Control Panel system.

The Business Unit cannot be amended after the user is de-provisioned from CRM.

The CRM licence that has been made "available" can be assigned to another user. A user's Business Unit can be amended in CRM by authorised System Administrator.

De-provisioning a User from CRM

1. Select the User Management icon on the Control Panel Menu Bar and select menu option “Users”. All users listed in your selected customer will be displayed.
2. Select the user that is to be de-provisioned from CRM.
3. Select the “Services” function.
4. Select the user’s provisioned CRM Service.
5. Select “Deprovision”. The user is de-provisioned from CRM on Control Panel. The user account on CRM is disabled.

CRM 4

Add CRM 4 Service to a User

1. Select the User Management icon on the Control Panel Menu Bar and select menu option “Users”. All users listed in your selected customer will be displayed.
2. Select the required user.
3. Select the “Services” function.
4. Select the "Customer Relationship Management 4.0" service (The Instance Name will appear after the Service Name) to configure the user’s service settings.

5. Select Service Access Level - "Full"
6. Select the "Business Unit" that the user will be added to from the drop down list. The configuration of Business Units is managed either in:

   - CRM 4.0.
   - Control Panel user interface when the CRM 4.0 service is provisioned to the customer.

   A user can only be assigned to one Business Unit.

   Once the user is provisioned with CRM 4.0, the Business Unit can not be amended in Control Panel. This rule still applies after the user has been de-provisioned from CRM 4.0 on Control Panel as the CRM 4.0 user account has become disabled on CRM 4.0 for auditing purposes.

   A user's Business Unit can be amended in CRM 4.0 by authorised System Administrator.

7. The "Security Roles" table will be populated with all security roles that have been configured a) to the selected Business Unit and b) made available for selection by your Service Provider.

   A user can be provisioned to multi security roles in CRM 4.0. Use the right hand scroll bar to view and select the user's CRM 4.0 security role(s).

   The security role for a user can be amended after the user is provisioned with CRM 4.0. De-select and select the new role and select to save the changes.

8. Select the "Site" to which the user will belong to. This field is optional and will default to "None" when no site is selected.

   A user can only be assigned to one site. The user's site can be amended after the user is provisioned with CRM 4.0.

9. Select the "Team" that the user will belong to. This field is optional.

   A User can be provisioned to multi teams in CRM 4.0. Use the right hand scroll bar to view and select the CRM 4.0 Teams. The assigned Team can be amended after the user is provisioned with CRM 4.0.

10. Select “Provision”. The user will be provisioned with CRM 4.0.

2.2.4. Office Communications Server (OCS)

Office Communications Server 2007 delivers streamlined communications for users so they can find and communicate with the right person, right now, from the applications they use most.

Add OCS Service to a User

1. Select the User Management icon on the Control Panel Menu Bar and select menu option “Users”. All users listed in your selected customer will be displayed.
2. Select the required user.
3. Select the “Services” function.
4. Select the “Office Communication Server 2007” service to configure the user’s service settings.
5. Enable the required Service Access Level. More than one service access level can exist for the OCS service. The service access level will determine the specific features that the user can use on the Office Communications Server.
6. Select “Provision” . The user will be provisioned with OCS.

2.2.5. Reporting

The purpose of the Reporting tool is to organize and present information in a report view using data that has been saved on Control Panel and to support the monthly billing process.

Control Panel Reports are delivered using Microsoft SQL Server Reporting Services from within the Control Panel web application. Data of Customer and Users is collated and processed using a combination of DTS packages and SQL databases to produce the reports.

By default, all users will have access to the Reports Menu. The user's security role will determine what reports will be displayed for selection. It is common for a user to have no access to view a report(s), the Reports Management screen will advise that no reports are available for selection.

Control Panel Default Reports

The Default Control Panel Reports that are available for use are:

Billing Reports:

Report Name	Description
Customer Billing Detailed Report	Objective of the Report: • Allows the Customer to view it's users and what services that they have been provisioned with. Available to User Administrators.

Exchange Reports:

Report Name	Description
Exchange Customer Usage Report	Objectives of the Report: • Allows the Customer to view its actual resource (MB) usage for Exchange Services. This includes Mailboxes and Public Folders. Report drill-down options are available, to view: • Customer Service Access Level Report - displays individual user's usage per Service Access Level. • Customer Public Folder Usage Report - displays sub-folder details and actual usage per sub-folder. Available to Exchange Service Administrators.

View a Report

1. Select Reporting icon on the Control Panel Menu Bar and select "Full screen report". A new browser window will be automatically opened with the "Report List" available.
2. Expand the report sub headings (Audit, Billing, Citrix, Exchange) and select the report that you want to view.
3. The Report Setup Page will be displayed with latest version of the report (yesterday's date).

   Note:

   The Control Panel user interface extracts the data from the Control Panel SQL Database, this may take a couple of minutes for the report to be produced.
4. The report's settings available for amending will be listed, amend if required.
5. Select the required Render type and Zoom % from the drop down lists and select "Generate".

6. The screen will refresh with a new report, defined by the amended settings. If you have selected a non HTML Render format, an File Download command prompt will appear.

Printing HTML Reports

Control Panel allows the end user to print the generated report direct from the user interface

1. Access the report as described above.
2. Select "Print".
3. The Internet Explorer Print function will appear configure print settings as required and select "Print".
4. The report will be printed at the selected printer.
5. To return to the main Report and Report Settings, select "Back".

2.2.6. SharePoint

Microsoft Windows SharePoint Services is designed to enable your company to publish a web site(s) that can be used to share documents and information with a wide variety of audiences in a controlled manner.

Control Panel supports Microsoft Windows SharePoint Versions 2 and 3.

Multiple SharePoint Sites can be provisioned to a customer. Each instance will include the site's URL within the Service Name.

Example: SharePoint Site URL address is http://aabc.devtest.local , the Instance Name will be displayed as SharePoint Service – aabc.devtest.local

Add SharePoint Service to a User

1. Select the User Management icon on the Control Panel Menu Bar and select menu option "Users". All users listed in your selected customer will be displayed.
2. Select the required user.
3. Select the "Services" function.
4. Select the SharePoint Instance, the URL for the site will be displayed as the Instance Name, to configure the user's service settings.
5. Select the relevant Service Access Level for the user:
   - Admins – This will provide the user with full administration rights to the SharePoint site. There must be at least one user with administration rights per SharePoint web site. The SharePoint Role "Administrator / Full Control" should be selected, allowing the user to have full access to all parts of the SharePoint site.
   - Users – This access level should be assigned to all users who are not administrators. Select the relevant SharePoint Role for the user.
6. Select either a Group and/or a Role Membership permission for the user, at least one membership must be selected. The site's Groups will only appear after the SharePoint site has been configured by the SharePoint Site Owner. If the SharePoint site had not yet been configured, only the role memberships will be displayed for selection and the Group Membership field will appear blank.

   Group Membership roles are only applicable to SharePoint version 3 sites.

   These membership roles will determine the level of access the user will have within the SharePoint site.
7. Select "Provision".

SharePoint Roles

SharePoint Roles control the different permissions that a user can perform within a SharePoint Site. The roles are managed within the SharePoint site by a Site Administrator.When a SharePoint site is created, four default SharePoint Roles are created. Additional roles can be added to a SharePoint Web site and will be fed through to the Control Panel UI for selection.

A user can be assigned to multiple SharePoint roles.

Default SharePoint Roles

Default SharePoint Roles		
SharePoint Ver.2.0	**SharePoint Ver.3.0**	**Description**
Reader	Read	Has read only access to the Web Site.
Contributor	Contribute	Can add content to existing document libraries and lists.
Web Designer	Design	Can create lists and document libraries and customize pages in the Web Site.
Administrator	Full Control	Has full control of the Web Site.

Note:

The above roles can be different depending on the roles created by your Administrator.

Add SharePoint Service to an External User

The purpose of SQL Authenticated SharePoint sites is to allow non-Control Panel / AD users to have access to the site. Control Panel users can still be added to the site via the Control Panel user interface but a username/password must be specified for the user.

The following SharePoint options will only be available if the SharePoint site has been provisioned as SQL Authenticated.

Add New Users to SharePoint

1. Navigate to the WSS site, and login as a site owner.
2. Click on the "Site Actions" button, and in the drop-down, select "Site Settings" This will load the Site Settings page, and you should see a new link in the "Users and Permissions" column called "Create User".
3. Clicking on the "Create User" link will take you to the CreateUser.aspx page. This will allow you to create a new user in authentication provider repository database and also on the current site (configured as a reader at first which you can change later).
4. Enter the basic information to create a new user such as first name, last name, login, email, and password.

   The default setting is for the page to create a random password for you and automatically -mail it to the user, so the site owner will never see it. You can un-check this option and specify a desired password which will also be e-mailed to the user.

How to access the SharePoint Site

Once a User has been provisioned with the Sharepoint service they should be able to browse the SharePoint site in the same way as any other web site. In the following example we have used the URL (https://aabc.devtest.local).

1. Enter the SharePoint site name in the address bar of your internet browser, and select GO or hit the Enter key on your keyboard

2. Once the site loads, the site will ask the user to Enter their UPN and password to access the web site. Enter these details and select OK
3. SharePoint will verify the UPN and password. If these are valid, the Home Page of the SharePoint Site will appear

SharePoint Sub-sites

Within a SharePoint Web Site, sub sites can be created and managed by the Site Administrator. These sub-sites will use the main site's URL as the first part of their URL.

Example: https://SyncMyMail.sharepoint.local/sales.

As part of the sub-site set-up process, the Site Administrator can manage the users who will have access to the sub-site, selecting the users from all users that have been provisioned to the main SharePoint Web Site.

SQL Authenticated Users - Change of Password

This applies to SQL Authenticated users only

To change your password, complete the following steps:

1. Click on the Welcome <user> drop-down, and select the option to change your password.
2. Clicking on this link in the drop-down will take you to the CreatePassword.aspx page.

   This page allows you to enter your old password, enter a new password, and confirm that new password. The password is then immediate changed, and the next time you log in, you must use your new password.

2.3. User Search

2.3.1. User Filter

The User Filter Tool Bar appears on the "Users" page. It allows the end-user to filter the User table.

1. Select the keyword to filter on from the drop down list. The keywords that are:
   - Userid
   - UPN
   - Firstname
   - Last Name
   - Location
   - Department
2. Select the alphabetic letter that you want the keyword to start with. The screen will automatically refresh, applying the filter to the Users table.

   At the top left hand side of the Users table, Control Panel will confirm how many users were found after the filter was applied.

   If more than 20 users exist in the table, Page Navigation buttons will appear at the top right of the Users table. Select these icons to navigate through the Users.
3. To list all Users, select "View All".

2.3.2. Advanced User Search

The Advanced User Search Tool Bar appears on the "Users" screen and allows the end-user to define the their user searches using additional user parameters.

More than one parameter can be selected to complete the User Search.

Select "Search" after the parameters are selected.

User ID
Enter an alphabetical letter to list all users where their User ID starts with the specified character

UPN
Enter an alphabetical letter to list all users where their UPN starts with the specified character

First Name
Enter an alphabetical letter to list all users where their First Name starts with the specified character

Last Name
Enter an alphabetical letter to list all users where their Last Name starts with the specified character

Service
Select from the drop down list of configured services. All users that are provisioned to the selected service will be listed

Access Level
Select from the drop down list of Service Access Levels. All users attached to the selected Service Access Level Security Group will be listed

Account Status

Select the expand arrow to view additional user account status options that can be applied in the user search:

- Account must be locked
- Account must be disabled
- Account must be expired

Password Expiry

Select the expand arrow to view additional Password expiry options that can be applied in the user search:

- Password must be expired
- Password must never expire
- Passwords expire in xx days

Additional Options

Select the expand arrow to view additional search options that can be applied in the customer search:

Location
Select from the drop down list of configured Locations. All users that are saved to the specified Location will be listed.

Department
Select from the drop down list of configured Departments. All users that are saved to the specified Department will be listed.

2.3.3. Smart User Search

The Smart Search functionality is available throughout the Control Panel user interface in the “User Management” Tool Bar.

Using Smart Search to search for a specific User

1. Select the search “Filter”:
   - Name – select this filter if you know the User's Name.
   - UPN – select this filter if you know the user's UPN.
2. Start entering the User's Name/ UPN in the Search field.

   Control Panel will automatically display all users within the selected customer that match the values that have been entered in a drop down list. The user's UPN will be is displayed in brackets depending on the search filter selected.

   The drop down list will continue to refresh with matched results if more characters are entered in the input field.
3. Select the required User from the drop down list and select “Go” . The screen will be updated with the selected user’s details.

2.4. Multiple User Provisioning

The Control Panel Control Panels allows user administrators to complete a specific transaction on multiple users.

1. Select the User Management icon on the Control Panel Menu Bar and option "Users".
2. Search for the customer users that are to be amended, using the Customer Management search function.
3. Select the eapand arrow for the "Multi User Selection" Tool Box. The box will expand and display all of the user functions that can be applied to multiple users. The Users table will be updated with a new column of check boxes.

Multiple User Functions	Description
Select All Users	All users attached to the customer will be selected.
Clear All Users	All users attached to the customer will be de-selected.
Services	Provision a service (basic version) to all selected users.
Disable	Disable all selected user's accounts. Press PF5 to refresh the screen and the user icons.
Enable	Enable all selected user's accounts. Press PF5 to refresh the screen and the user icons.
Provision	Provision all selected users.
De-Provision	De-provision all selected users.
Delete	Delete all selected users.

4. Check the required users.
5. Select the required function. A bulk provisioning request will be generated for all users.

   For the "Services" function, the Control Panel will navigate to "User Services - Multiple Users" screen.

   All of the services will appear with a blue provisioning status.

   Select the service that you want to provision to the users, complete the necessary changes and select "Provision". The service provisioning status will change from blue to green. If "De-provision" is selected the provisioning status will change from blue to grey.

   Note:

Only generic service settings can be selected when provisioning to multiple users such as Service Access Levels. To configure specific service settings that only apply to an user, use the User Services screen.

2.5. Bulk User Import

The Bulk User Import functionality can be used to:

- Create and provision a large number of new users in a single transaction
- Import bulk changes to existing users. For example - Organizational restructure

The process is a three phase approach, which involves saving a system generated template in Excel, inputting the necessary data and importing the template back into the Control Panel System.

The Bulk User Import functionality is a fast way to create and update multiple users within a customer, however it does not support the provisioning of services to a user. To add services to a user, use the user function "Services".

By default, the Bulk User Import processing occurs in the front end of the system however Control Panel allows Bulk User Import to complete it's processing in the back-end of the system. This will depend on your Service Provider's configuration but can easily be identified by the number of functions available on the Bulk User Import Page

Warning!!

To ensure that the functionality works effectively, do not rename the Excel Template column headings or leave blank rows between user accounts.

The functionality is compatible with Excel versions 2000, 2003 & 2007.

Download Excel Templates (Bulk User Import processing completed in the front end of the system)

1. Select the User Management icon on the Control Panel Menu Bar and select option "Bulk User Import".
2. Select the template that you want to download and use:

   "**New Users Template**" - for a blank excel template that you can new users to

   "**Existing Users Template**" - for a populated excel template containing all of the customer's existing users information

   Hint:

   If you are not sure of the data inputs for a new user, download the Existing User Template and add the new users under the existing users data, referring to the existing users data for type of data that should be inputted.
3. Select either "Open" or "Save". The template file must be saved before importing it back into Control Panel.

Download Excel Templates (Bulk User Import processing completed in the back end of the system)

1. Select the User Management icon on the Control Panel Menu Bar and select option "Bulk User Import".
2. Select the template that you want to download and use:

   "**New Users Template**" - for a blank excel template that you can new users to

   "**Generate Template**" - for a populated excel template containing all of the customer's existing users information. The excel spreadsheet will not be generated straightaway. Control Panel will generate the Excel spreadsheet in the back end environment and advise the user to return to the screen after a couple of minutes to see if the file is ready for download.

After several minutes, return to the Bulk User Import screen, Control Panel will advise whether the file is ready with a Generate status and a date/time stamp.

Select "**Existing Users Template**" to open/save the template in Excel.

Hint:

If you are not sure of the data inputs for a new user, download the Existing User Template and add the new users under the existing users data, referring to the existing users data for type of data that should be inputted.

3. Select either "Open" or "Save . The template file must be saved before importing it back into Control Panel.

Add User Information to Excel Spreadsheets

To assist with data input, Row 1 of the spreadsheet is populated with the data items, additional help comments for a data item are marked with . Move your mouse over the column's heading to view the additional comments.

1. Add new users to the spreadsheet, do not leave blank rows between Row 1 and users. For the user's account details, select a value from the cell's drop down list. For New Users, ensure that a password is entered.
2. If amending existing users, change the appropriate details for the impacted users. Users that do not require editing can either be left on the spreadsheet or deleted from the template.

   Note:

   The Location & Department values must be present on Control Panel if changing these values. If the values are not present on Control Panel, the user will be assigned to the default setting - Unassigned.

3. Save all changes made to the Excel spreadsheet. Close the spreadsheet.

Import Updated Excel Template into Control Panel and provision the changes

1. Re-select the User Management icon on the Control Panel Menu Bar and select option "Bulk User Import".
2. Select "Browse" and locate the saved Excel file.
3. Add a description (optional) to help identify the file and select "Upload".
4. Control Panel will verify the specified file and refresh the screen with the file's details. The Bulk User Import list will expand as more files are uploaded onto Control Panel.
5. Select the request to review the import details.

   The function "Download " can be used to download a copy of the uploaded file. This function can be used to create customized templates

   The function "Delete" will delete the file from the Bulk User Import File list when it is no longer required.

6. Select "Import" to validate the user information.
7. The Bulk User Import screen will appear listing all New Users to be added to the Control Panel system.

   If changes have been made to existing users, select the "Existing Users" radio button to display all existing users.

   Any validation errors will be highlighted with a . Hover over the icon to view detailed information for the error

   By default, all users will be selected for user import. De-select users that you do not want to be imported on to Control Panel. Un-edited users that remain selected will be re-provision but no changes will be made to the user

8. Select "Save" to complete the user import and update Control Panel with the latest changes.

Control Panel will navigate back to the Bulk User Import List. Select "View" to view detailed information regarding the provisioning request.

The bulk User import is a fast way to import create and update multiple users in both database and Active Directory, it does not give the users any services. To apply users services to a User you will need to use the Control Panel Administration interface, click here to view how to add User services.

2.6. Email Configuration

Control Panel allows the User Administrator to effectively report and manage user accounts.

On the Email Configuration screen, the User Administrator can configure two Control Panel generated outputs. These are:

- Email Expiry Report - A daily report that is automatically sent to a Customer's User Administrator listing the number of users per account status
- Email Notification Report - A email that is sent to all users within a Customer where their password is set to expire within a defined number of days. A summary report is sent to a Customer's User Administrator

Both reports can be configured at the same time on the screen.

Configuring the Email Expiry Report

The Email Expiry Report assists the User Administrator with managing user accounts where:

- Passwords have been set to not expire
- User Accounts where the user's password has expired
- User Accounts that are locked due to unsuccessful log-on attempts
- User Accounts that have been disabled

The report's configuration can include one or multiple selection of these conditions. The report is generally produced overnight, the exact timing is set by your Service Provider.

For security reasons, the report will only advise the number of users that have met the specified condition. To identify the user's name, a advanced search must be performed on the Users screen.

1. Select the User Management icon on the Control Panel Menu Bar and option "Email Configuration".
2. Select "Yes" for the Email Expiry Report. This will enable all of the user account conditions that can be applied to the report.
3. Select the required conditions, at least one must be selected, that you want to be applied to the report by selecting "Yes".
4. For the condition "Users with passwords that expire in..", select "Yes" and specify the number of days.
5. Specify the user administrator's email address that the report will be sent to on a daily basis.
6. If you want to send the report to more than one User Administrator, create a Exchange Distribution Group and add the Distribution Group's email address to the setting.
7. Select the language that the report will be printed in from the drop down list.
8. Select "Save". The report will be produced at the next scheduled point of time.

Configuring the Email Notification Report

The Email Notification Report consists of an email being sent to any user whose password is due to expire within the configured number of days. The Control Panel system runs a daily process that collates the impacted users before sending an email to the users. The email notification will be sent to the user's primary email address.

In addition , a summary report is generated and sent to the configured User Administrator's email address. The report will list:

- All users where the Password Email Notification was sent successfully to their primary email address
- All users where the Password Email Notification was not sent because no email address was configured

The email and report is generally sent to the users overnight, the exact timing is set by your Service Provider.

A user will continue to receive the daily email until a) they change their password or b) their password expires.

1. Select the User Management icon on the Control Panel Menu Bar and option "Email Configuration".
2. Select "Yes" for the Email Notification Report.
3. Select "Yes" for condition "Users with passwords that expire in.." and specify the number of days.
4. Specify the user administrator's email address that the Email Notification Summary Report will be sent to on a daily basis.
5. If you want to send the report to more than one User Administrator, create a Exchange Distribution Group and add the Distribution Group's email address to the setting.
6. Select the language that the emails and report will be printed in from the drop down list.
7. Select "Save". The user email and report will be produced and distributed at the next scheduled point of time.

2.7. Locations & Departments

The Location and Department screens allow the Customer User Administrator to add and manage Locations and Departments for the customer. These screens are available under the User Management icon on the Control Panel Menu Bar.

The customer's users can be assigned to a Location and/or Department using the Edit User feature.

Reseller Administrators cannot add Locations/Departments directly to their sub customers. To do this, the sub customer's user administrator must be impersonated.

2.7.1. Locations

A customer can be set up with a structured organisational structure using Locations and Departments.

Once Locations and Departments have been configured for a customer, its users can be assigned to the different categories. By assigning users to Locations and Departments will determine where the user's Active Directory details will be stored.

Add Locations to a Customer

1. Select the User Management icon on the Control Panel Menu Bar and menu option "Locations and Departments".
2. The Locations screen will appear by default. If the Departments screen appears, select "Locations" in the "Related Pages" tool box.
3. By default, the Location "Unassigned" will appear. Select "Add" to create a new location.
4. Enter the new Location's name and select "Add".

5. The new location has now been added to the Customer. When creating/editing a user, the Location drop down list will include the new location. Users can now be assigned to the location.

Edit an existing Location

1. To edit an existing Location, navigate to the Locations Tab.
2. Select "Edit" beside the Location Name that is to be amended.
3. Complete amendments in the text box and select "Update" to save the changes. The Location Name has now been amended.

Delete an existing Location

A location can only be deleted from the Control Panel system when no users are attached to it and the "Delete" option is displayed.

1. To delete an existing Location, navigate to the Locations Tab.
2. Select "Delete" beside the Location Name that is to be deleted.
3. The system will confirm that "you are sure you want to delete this record?". Select "OK". The Location is deleted from the system and will not appear in the drop down list on the User Properties Tab.

To identify what users are assigned to a location, use the Advanced User Search tool box and "Advanced Options" on the Users screen.

2.7.2. Departments

A department can be configured to multiple locations when assigned to a user.

Example:

User One has been assigned to Location A and Department Z
User Two has been assigned to Location B and Department Z

Add Departments to a Customer

1. Select the User Management icon on the Control Panel Menu Bar and menu option "Locations and Departments".
2. The Locations screen will appear by default. Select "Departments" on the "Related Pages" Tool Bar to navigate to the Department's screen.
3. By default, the Department "Unassigned" will appear. Select "Add" to create a new department.
4. Enter the new Department's name and select "Add".

   The new department has now been added to the Customer. When creating/editing a user, the Department drop down list will include the new department. Users can now be assigned to the department.

Edit an existing Department

1. To edit an existing Department, navigate to the Departments Tab.
2. Select "Update" beside the Department Name that is to be amended.
3. Complete amendments in the text box and select "Update" to save the changes. The Department Name has now been amended.

Delete an existing Department

A department can only be deleted from the system when no users are attached to it and the "Delete" option is displayed.

1. To delete an existing Department, navigate to the Departments Tab.
2. Select "Delete" beside the Department Name that is to be deleted.
3. The system will confirm that "you are sure you want to delete this record?". Select "OK". The Department is deleted from the system and will not appear in the drop down list on the User Properties Tab.

To identify what users are assigned to a department, use the Advanced User Search tool box and "Advanced Options" on the Users screen.

2.8. Create a New User

A new user can be added to Control Panel via three different options:

- New User wizard
- Copy User
- Bulk User Import

Creating a New User via New User wizard

1. Select the User Management icon on the Control Panel Menu Bar and select "New User"

   Alternatively, from the "Users" screen, select "New User"

2. Add the user's UPN (User Principle Name), inputting the user name and selecting a domain from the drop down list.

   This is an alternative log-on name which can be used instead of the Username.

   Control Panel will auto populated the "Username". The value can be manually overridden before the user is saved to the customer.

   The Username must be a unique. If the Username already exists on the system, Control Panel will display an error message when "Provision" is selected.

   The Username field will automatically be populated with the UPN name. The Username can be amended.

   The Customer's ShortName will appear beside the Username as "_<CustomerShortName>". If a user attempts to log-on an application, they must include the Customer ShortName.

   The Username cannot be amended after the user has been created on the system.

3. Enter the user's "First Name" and "Last Name". The "Display Name" will be automatically populated with these values and can be manually overridden.
4. Optional, select "Additional User Properties" to add non mandatory user information.
5. Allocate the required "Location" and "Department" for user from the available drop down lists. These values are configured at individual Customer level and will vary. The default setting is "Unassigned" and the user will be saved with these settings if not other values are available.
6. Enter the user's contact details - address and contact phone numbers.
7. Enter the user's organizational and general details

   If required, add values to the two Custom Fields. The name of these data fields may change depending on your Service Provider's configuration.

If required, enter the user's email address. This email may be an external email address that is not managed by Control Panel.

It is recommended to use this field if:

- The user does not use the Exchange Service, and
- The user's email address needs to be saved so that it can be used in other services (e.g. SharePoint) or
- Saving a secondary email address for contacting the user

8. Under the sub heading "Password Configuration", enter a "Password" and re-enter the password again to verify.

   Control Panel will create an audit record on the SQL database, recording the date that the password was changed and who requested the reset.

9. Optional, expand the "Account Settings" section to configure the user account settings;

   "Set Password to never expire" - This option will be displayed if the user's Customer has been configured to allow users to have a password that never expires. If "Yes" is selected, Control Panel will not request the user to reset their password at regular intervals.

   "Change Password at Logon" If "Yes" is selected, the new user will be prompted to change their password when they log-on to Control Panel for the first time. The user will not be able to use any services that they have been provisioned to until they change their password.

   “Account Disabled” - If "Yes" is selected, the user's account will be disabled and the user will not be able to access any services that they have been provisioned to.

   “Account Locked” - This field will always default to "No".

   “Account Expires” - If "End of" is selected, the screen will refresh and display a calendar. Select an end date for the user's account.

   If an end date is selected, Control Panel will automatically disable the user's account on the next calendar day and they will not be able to access Control Panel or any related services. Leave setting as "Never" if the user's account does not need to expire.

   This setting does not define the Password Expiry date (expiry date for current password). This is configured by your Service Provider on the domain's Group Policy

   “Password expires” - Read only value. The date when the user's password will expire the user will be requested to change their password when they log-on to Control Panel.

10. The user will automatically be assigned with standard user rights, with access to service-related web pages granted when the user is provisioned with a service. To assign Advanced user permissions (Administration rights), select "Advanced Options".

    A user can be assigned to either a) a common administration role or b) a customized role, using a combination of the existing roles:

    - To select a common administration role, select a role from the drop down list
    - To create a customized role, check and select the roles that the user will be assigned to

11. Optional, expand "Email Addresses" section to add an email address for the user. If no email address is added, Control Panel will add the UPN as a default. This will be set as the user's primary email address and will be used by the Control Panel system to send any system generated emails to the user.

    To add an additional email to the user, select "Add" and input the new email name. Select the required domain from the drop down list. The list should contain all domains that have been configured to the customer.

    Select "Primary Address", if the new email address will be the user's primary email address. The primary email address flag can not be assigned to multiple email addresses.

    Select "Update" to save changes.

All remaining email addresses, where Primary Address flag is not set, are called email aliases. An unlimited number of email aliases can be assigned to a User.

12. Select "Provision" to save the user to the customer. Control Panel will automatically navigate to the User Services screen.

3 Service Administration Features

3.1. Exchange

3.1.1. Public Folders

Exchange Public Folders are set up when Hosted Exchange is provisioned to a customer. A root public folder will be created for the customer. The naming format of the root folder will be dependent on the Service Provider's configuration settings but may appear in the format of either a) the primary domain name or b) short name of your company.

The Public Folder screen is available to all Full Customer Service Administrators when Hosted Exchange is provisioned to a customer. The screen provides end-users with the ability to create, manage and delete sub-public folders. The public folders will be displayed in Outlook under the Public Folder Menu. Public Folders can be mail enabled, allowing users to send email directly to the Public Folder.

Full Customer Service Administrator have access to manage Public Folders in Outlook.

The Public Folder screen is split into three tabs:

- Folder Management
- Mail
- Permissions (only available to Exchange 2007 users)

A) Folder Management

Create a Public Folder

1. Select the Services icon on the Control Panel Menu Bar and select menu options “Exchange” >> “Public Folders”. The “Public Folders” screen will be displayed.
2. Select the Root Public Folder Name, the Public Folder Management Tab will appear.

   The root public folder is created when the exchange service was provisioned to the customer and normally appears as the Customer Short Name.

   The root public folder cannot be deleted or renamed.
3. Enter the new sub-folder's name.
4. Select “Create”. The Public Folder tree structure will refresh and the new sub-folder will appear.

Rename a Sub Public Folder

The Root Public Folder cannot be renamed.

1. Select the Public Folder that is to be renamed.
2. Enter a new folder name.
3. Select "Rename" . The Public Folder tree structure will refresh and the new amended sub-folder's name will appear.

Delete a Sub Public Folder

The Root Public Folder cannot be deleted. It will only be deleted when Hosted Exchange is de-provisioned from the customer.

1. Select the Public Folder that is to be deleted.
2. Select "Delete".
3. Select "OK". The Public Folder Folder tree structure will refresh and the deleted folder will be removed from the directory structure.

B) Mail

Mail Enable a Public Folder

All Public Folders can be mail enabled, where emails can be sent directly to the Public Folder. Each public folder can have one primary email address and multiple email aliases.

1. Select the Public Folder that is to be mail enabled.
2. Navigate to the "Mail" tab.
3. Select "Enable Mail". The Public Folder email address table will appear.
4. Select "Add".
5. Enter a email address for the Public Folder and select "Update"
6. Select "Save Emails" to capture the changes. The Public Folder is now mail enabled and "Send As" / "Hide from Address Book" permissions can be configured on the public folder (only applicable to Exchange 2007)

Disable a Mail Enabled Public Folder

1. Select the required Public Folder.
2. Navigate to the "Mail" tab.
3. Select "Disable Mail". The Public Folder is now non-mail enabled.

C) Permissions

This Tab will only be displayed if the customer has been provisioned with Exchange 2007. Permissions applied will only be configured to the selected public folder. The permissions will not be inherited by any sub-folders of that public folder.

Remove a Public Folder Email Address details from the Global Address List

The Control Panel Control Panel allows the Exchange Service Administrator to control whether the public folder's email address details are displayed on the Global Address List in Outlook.

1. Navigate to the "Permissions" Tab.
2. Enable the "Hide from Address List" option.
3. Select "Save Permissions" to save the changes. The Public folder will not appear in the customer's Global Address List.

Note:
If a Public Folder is set to "Hide from Address List", any users that have been given "Send As" permissions to the Public Folder will not be able to send mail using the Public Folder's email address. The following error message appears:

"You are not allowed to send this message because you are trying to send on behalf of another sender without permission to do so. Please verify that you are sending on behalf of the correct sender, or ask your system administrator to help you get the required permission."

Restrict the Public Folder's incoming mail to users within it's organization

Public Folders can be configured to only accept incoming email that is sent from users who are within the public folder's customer organization. This prevents the public folder from being inundated with external "spam" email.

1. Navigate to the "Permissions" Tab.
2. Enable the "Senders require authentication" option.
3. Select "Save Permissions" to save the changes.

Apply "Send-As" permissions to a public folder

A Public Folder can be assigned with "Send As permissions where the assigned user can send out an email with the Public Folder's email details appearing as the "From Recipient". From the target audience's perspective, it will appear that the email has come direct from the Public Folder and any responses will be sent direct to the Public Folder's inbox.

To enable 'From" option in Outlook, select here

1. Navigate to the "Permissions Tab".
2. Select "Find" to search for all mail enabled users. Select the user(s) that will be able to send email using the Public Folder's email address.
3. Select "Add". To remove an existing user from the "Send As" Permission list, select the user and click "Remove".
4. Select "Save Permissions" to capture the changes.

3.1.2. Contacts

Control Panel provides end-customers with the ability to add external contacts to their company's Global Address Lists. Users are able to amend the Contact's details and assign them to company distribution groups.

Provisioned Exchange users are able to view the Contact's details on the Global Address List in Outlook Client and send emails to them.

The Exchange Contacts screen is available to all Full Customer Service Administrators when Hosted Exchange is provisioned to a customer.

Create a Contact

1. Select the Services icon on the Control Panel Menu Bar and select menu options “Exchange” >> “Contacts”. The “Contacts” screen will be displayed.
2. In the Contact Management Tool Box, select "New Contact".
3. Enter the Contact's details. Fields marked with an * are mandatory.
4. Select "Save" . The Contact will be listed on the Exchange Contact screen.

Amend an existing Contact

1. Select the Services icon on the Control Panel Menu Bar and select menu options “Exchange” >> “Contacts”. The “Contacts” screen will be displayed.
2. Select the Contact that you what to amend.

3. Update the Contact Details screen with the required changes. Select "Save".

Delete a Contact

1. Select the Services icon on the Control Panel Menu Bar and select menu options “Exchange” >> “Contacts”. The “Contacts” screen will be displayed.
2. Select the Contact that you what to remove from Control Panel and the company's Global Address List.
3. Select "Delete". The contact will be deleted from the customer.

3.1.3. Distribution Groups

A Distribution Group allows a collection of users, contacts and other distribution groups to be aggregated within a single group and associated with one email address. An email is sent to the one email address, Distribution Group email address, but is received by all users/contacts that are attached to that specified Distribution Group.

Control Panel provides end-customers with the ability to create and manage Global Distribution Groups. All Exchange users will have access to view their customer's Distribution Groups on Outlook under Global Address List.

A Distribution Owner can be assigned to a group, this can be either a exchange enabled user or a security group. The Distribution Owner has permissions to add/remove group member via Outlook. This is an optional feature.

Multiple Distribution Groups can exist with a Customer's Global Address List and users can be assigned to more than one Distribution Group. Users can be added to a Distribution Group via Distribution Groups Screen or when provisioning a user with Exchange.

The Distribution Groups screen is available to all Full Customer Service Administrators when Hosted Exchange is provisioned to a customer.

- Create a Distribution Group
- Distribution Group Advanced Features
- Manage Users in a existing Distribution Group
- Delete a Distribution Group

Create a Distribution Group

1. Select the Services icon on the Control Panel Menu Bar and select menu options “Exchange” >> “Distribution Groups”. The “Groups” screen will be displayed.
2. Select "New Distribution Group" from the Group Management Tool Box.
3. Enter a "Group Name" for the Distribution Group. Ensure Group Type for "Distribution" is enabled.
4. Select "Save".
5. Select "Find" to list all users. By entering a user name, the search will be narrowed.
6. Select the users/contacts that are to be added to the Distribution Group. Users are marked with icon, contacts are marked with icon, public folders are marked with icon and existing distribution groups are marked with icon.
7. Select "Add". The selected users/contacts will appear under the sub heading "Existing Group Members".
8. Select "Add" to create a email address for the Distribution Group.
9. Enter an email address and select the required domain from drop down list.
10. Select "Update" to save email changes.

Note
The Email Name value automatically populates the Mail Alias field. This field can be overridden.

11. For Exchange 2007 users only, an additional field will be displayed under "Mail Alias" called "Senders - Require Authentication". Enable this field if you want to prevent messages that originate from outside of your organization from being delivered to the distribution group

12. Select "Save". The new Distribution Group will be displayed on the Distribution Group Page and will appear in the Global Address List on Outlook.

Advanced Settings

To add a Distribution Group Owner or/and apply Send As Permissions to the Distribution Group, select "Advanced Settings"

a) Distribution Group Owner

The Distribution Group Owner will have permissions to add/remove members from the distribution group in Outlook.

1. Under heading "Group owner (managed by)", select "Find" to list all Outlook enabled users and Security Groups. By entering a user name or a set of characters, the search will be narrowed.
2. Select the required user / Security Group that is to be assigned to the Distribution Group.
3. Only one security group or user can be assigned as a Group Owner at any given time.
4. To change the owner to a new user, select the distribution group and select a different user / Security Group. This will replace the existing Group Owner's details with the new user.

   The changes will be captured when "Save" is selected.

b) Send-As Permissions

Existing exchange users can be set up with Send As permissions for a specific Distribution Group. This allows a user to create and distribute an email with the "From Recipient" field populated with the Distribution Group email address e.g.) IT Helpdesk.

1. Under heading "Send-As Permissions", select "Find" to list all Outlook enabled users and Security Groups. By entering a user name or a set of characters, the search will be narrowed.
2. Select the user(s) that will be able to send email from the Distribution Group's mailbox. Multiple users can be configured to one Distribution Group.

   The changes will be captured when "Save" is selected.

Manage Users in a existing Distribution Group

1. Select the Distribution Group
2. To add additional users/contacts, select "Find" and select the user/contact. Select "Add". User will appear under Existing Group Members
3. To remove a user from a Security Group, select the user and select "Remove".
4. Select "Save" to save Distribution Group changes

Delete a Distribution Group

1. Select the Distribution Group.

2. Select "Delete".

   The Distribution Group will be removed from the Distribution Group Page and the customer's Global Address List.

3.1.4. Mail Disclaimers

Applicable to Hosted Exchange 2007 only

The Exchange Service Administrator has the ability to create and manage the company's email disclaimer. Once configured, the email disclaimer will appear on all of the company's users outgoing email.

To create a mail disclaimer

1. Select the Services icon on the Control Panel Menu Bar and select menu options “Exchange” >> "Mail Disclaimer”. The “Mail Disclaimers” screen will be displayed.

2. Enter a "Name" for the disclaimer message.
3. Enter the company's "Disclaimer". The Control Panel displays a sample disclaimer template when selecting the Help icon.
4. Select the formatting settings for the paragraph. After changing a setting, the disclaimer content will updated to reflect the changes made.
5. Select the "Placement" settings:

   Append - The disclaimer will be inserted at the bottom of the message thread.

   Prepend - The disclaimer will be inserted above the text of the latest message.

   Note:

   Exchange does not verify and check whether previous disclaimers have been added to the message.
6. Select the "Behavior" settings for the disclaimer when it cannot be inserted into the original message.

   Wrap - The original message is enclosed into a new message envelope with the disclaimer being inserted into the new message.

   Ignore - Allow original message to continue unmodified. No disclaimer is added.

   Reject - If the disclaimer can't be inserted into the original message, the message is rejected and Exchange will not deliver the message. The sender of the message receives a notification explaining why the message wasn't delivered.
7. Enable the "Separator" line. The disclaimer will be clearly separated from the main email text with a horizontal separator line.
8. Specify whether the disclaimer should only appear on email messages that are sent to external users (users that are not attached to the organization unit). If this field remains unchecked, the mail disclaimer will appear on all email messages that are sent to external and internal users
9. Select "Save" to capture the changes. The disclaimer details will be sent to the provisioning engine.

3.1.5. Resource Mailboxes

Applicable to Hosted Exchange 2007 only

Resource mailboxes represent resources that may be utilized in meetings. For example: Meeting Rooms, Overhead Projector and flipcharts.

By allocating these resources with a mailbox, users can include them in meeting requests, creating an effective resource management tool and reducing the risk of resources being double booked. When a meeting is booked with a resource mailbox, the invitee will receive an "Auto Accept" from the resource. Within the resource mailbox, the invite will be automatically directed to the "Delete Items" folder.

All users within a customer will be able to manage the customer's resource mailboxes via Outlook & OWA.

Exchange Service Administrators are granted the access to create, amend and remove resources from the customer's organisational unit.

Add a Resource Mailbox

1. Select the Services icon on the Control Panel Menu Bar and select menu options “Exchange” >> "Resource Mailboxes”. The “Resources” screen will be displayed.

2. Select "New Resource Mailbox" which is located in the "Resource Management" Tool Box.
3. Enter the "Display Name" for the Resource. This will appear in user's address list when selecting resources.
4. Select either "Room" or "Equipment":
   - Room Resource Mailboxes are assigned to a meeting location.
   - Equipment Resource Mailboxes are not room specific.

   Note:

   Once a resource type has been provisioned to a Resource, it cannot be amended. To change the type, the resource mailbox must be de-provisioned before a change can be made.
5. Select "Provision" to save the changes.

3.1.6. Mailbox Export & Import

The User Interface allows Exchange Service Administrators to import and export Exchange mailboxes. This process involves the mailbox being saved as a PST file and saved on a FTP server for export/import.
To access the Mailbox Import & Export screen, select from the main Control Panel Menu Bar - Services >> Exchange >> Mailbox Import/Export.

The screen will display the user's FTP logon details for logging onto the server where the exported mailboxes will be saved to. This directory will also contain the Import folder where mailboxes that are to be imported onto a Control Panel user should be saved.

The screen is split into two sections:

- Export Mailboxes - select this link to export any of your users mailboxes
- Import Mailboxes - select this link to import an mailbox PST file into an existing Exchange user's mailbox

Export Mailboxes

The Export Mailbox feature, exports the data from a user's mailbox so that it can be imported into another.

1. Select "Export Mailboxes". All users that are provisioned with an Exchange mailbox will be displayed.
2. Select the users whose mailboxes are to be exported into a .PST file by checking the Export box. Alternatively click on "Select All" to select all users that are displayed on the current page or "Select Collection" to select all user mailboxes that are attached to the Customer.

3. Select "Export Mailboxes". The export process will commence and the date & time of the request will be inserted beside the user in the Last Export field. To view how the process is progressing select "Refresh Status". Do not select F5 as this will collapse the Export Mailboxes section.
4. Once the mailbox(es) have been exported successfully to the FTP server, the provisioning status will change to green
5. The exported mailbox will appear on the FTP server under folder "MailboxExport". Depending on the system configuration settings, the .PST file may have been compressed into a .ZIP file.

Import Mailboxes

The Import Mailbox feature, imports an external data file (.PST) into a user's existing mailbox. Before proceeding with the import, ensure the incoming file is stored on the FTP server under folders "MailboxImport" or "MailboxExport".

1. Select "Import Mailboxes". All users that are provisioned with an Exchange mailbox will be displayed.
2. Select the user(s) whose mailbox will be updated with the external data file by selecting "Edit". A drop down list will appear for the user in the "Import File" column and the "Import" box will be automatically checked for the user.
3. Search and select the relevant import file that is to be added to the user's mailbox and select Update.
4. Select "Import Mailboxes". The table will be updated and the date & time of the import will be displayed beside the customer in the Last Import field. To view how the import process is progressing, select "Refresh Status".
5. Once the import file has been imported into the user's mailbox successfully, the provisioning status will change to green. When the user logs onto their email system, they will be able to view the additional emails that have been imported.