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Worklife 365

Worklife 365 SOHO support guide

Version 1.0

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Contents

Setup

1 How to import a PST files

How to import a PST files into Outlook 2007

1. Log into Outlook 2007 with the correct user profile.
2. Click on **File > Import and Export**.
3. Select **Import from another program or file** and click **Next**.

4. Select **Personal Folder File (.pst)** from the list and click **Next**.
5. Click **Browse** and navigate to the location of the pst file you wish to import, then click **Next**.
6. To import the entire pst file, select the **Archive Folders** folder from the list and ensure that **Include subfolders** is ticked. If you want to replicate the folder structure of the pst file in the mailbox you are importing into, select **Import items into the same folder in:** and ensure that the current mailbox is shown in the field. Click on **Finish** to import the items.
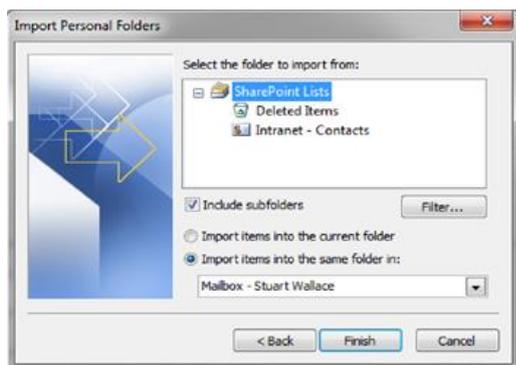
Importing PST to Outlook 2010

1. Log into Outlook 2010 with the correct user profile.
2. Click on **File > Open > Import**.
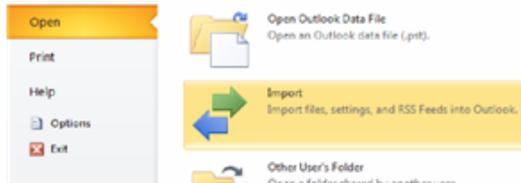
3. Select Import from another program or file and click Next.

4. Select Outlook Data File (.PST) from the list and click Next.

5. Click Browse and navigate to the location of the .PST file you wish to import. Click Next.

6. To import the entire PST file, select Outlook Data File folder from the list and ensure that Include subfolders is ticked. If you want to replicate the folder structure of the PST file in the mailbox you are importing into, select Import items into the same folder in: and ensure that the current mailbox is shown in the field.

7. Click on **Finish** to import the items.

2 Installing and configuring Outlook for Mac 2011 with WorkLife365

Installing Outlook for Mac 2011

This guide presumes you have downloaded the latest version of Outlook for Mac 2011.

Outlook_for_Mac_2011_English.ISO can be downloaded from the Software section of the Documentation Downloads page in the control panel

1. Run **Outlook_for_Mac_2011_English.ISO**. The installer will then mount.

2. Double-click the **Office Installer** icon. Click **Continue**.

3. The Software License Agreement will be displayed. Click **Continue**.

4. You will be asked to agree to the Software License. Click **Agree**.

5. The installation type will be displayed (i.e. standard). Click **Install**.

6. You will be prompted for your name and password. Enter the **username** and **password** for your local computer account and press **OK**.

Note: you may have to close certain applications for the installation to complete.

7. Once the installation process has completed, click **close**.

Configuring Outlook for Mac & WorkLife365 Email

Once you have successfully installed Outlook for Mac 2011 you can configure your WorkLife365 Email account.

1. Launch Outlook for Mac 2011 clicking on the   icon in the App Dock.
2. From with Outlook navigate to the tool bar and select: **Tools > Accounts**.
3. When prompted in the Accounts pane select **Exchange Account**.
4. You will then require your WorkLife365 Email user information on hand to setup your account.

Note: Your user name can be found by logging into the WorkLife365 control panel and clicking on Exchange. Now click on Mailboxes and then the name of the user. The Windows domain\username will be displayed here.

The following format should be used when entering your Exchange account information.

E-mail address: example@example.com
Method: User name and password
User name: SSP\username
Password:

5. Once all the account details have been entered, tick the **Configure automatically**.
6. Click **Add Account**. Outlook for Mac 2011 will then attempt to connect to the specified mailbox.
7. You will then be prompted to verify that you wish to access the information directly from the server. Tick **Always use my response for this server** and then click **Allow**.
8. If Outlook for Mac 2011 is unable to connect using the settings provided you will be prompted for further information. This is because you do not have an Auto discover record setup in DNS for your email domain. In the Server field enter: **oa.email.star.co.uk**.
9. Click on **Add Account**.
10. When the connection is successful, the icon next to the account name in the left hand column will turn green to indicate the connection to the WorkLife365 Email Exchange Platform has been made. You can then close the Accounts pane and return to the main Outlook window.

If this icon remains orange, then the connection cannot be made or the details entered were not correct. Check your network connection and make sure that the details entered are correct.

3 IM client installation guide

Function

By installing Microsoft Office Communicator and Microsoft Office LiveMeeting you will be installing the underlying applications that will deliver:

- Instant Messaging
- Screen Sharing
- Presence
- File Transfer

- Audio and Video Calls
- Web Conferencing

Configuration

This configuration guide presumes you have downloaded the latest version of Microsoft Office Communicator 2007 R2 Vnn.exe" installer from the Star downloads area (or similar). The installer contains all the required software to install Microsoft Office Communicator 2007 R2 client and Microsoft LiveMeeting.

Before beginning the deployment of Microsoft Office Communicator you should ensure or be aware of the following to ensure a smooth installation process.

- You are running 32-bit or 64-bit version of Outlook 2007 or Outlook 2010.
- You are fully up to date by using **Microsoft updates**.
- You have your default user profiles for WorkLife365 Email (Hosted Exchange/Star Business Email) associated with Office Communicator (see separate guide for help with this).
- You will be asked a few questions when running the installer, make sure you answer these correctly to successfully install Microsoft Office communicator 2007 R2 client and Microsoft LiveMeeting.

To start the installation process make sure Outlook is closed and up to date. Download **Microsoft Office Communicator 2007 R2 Vnn.exe** from the Software section of the Documentation Downloads page. The script file can be found in Microsoft Office Communicator 2007\OCS Client\Automated Client Install folder.

1. Run Install Office Communicator.wsf .
2. Acknowledge the silent install message by clicking **OK**.
   You will then be prompted with a number of questions:
   "Do you want to install Microsoft Communicator Client?"
   "Do you want to install Microsoft LiveMeeting?"
   "Do you want to install Microsoft LiveMeeting for Outlook?"
   Click **Yes** to install. If you select **No**, the installation will be cancelled.

3. You will then be prompted with "Is your version of Outlook 32bit?" Select **Yes** if your version of Outlook is 32-bit. If you are unsure if you have 32-bit or 64-bit select **Yes**.
4. Insert the WorkLife365 IM account user name (**e.g.name@domain.com**)
5. A window confirming what will be installed will appear. Click **OK** to continue. Clicking **Cancel** will cancel the whole installation process. Installation of the requested applications will start.

NOTE: This is a silent install. You will only be advised of the status of installation when the installation process has completed.

6. Acknowledge installation of the requested applications have installed correctly and click **OK**.
7. The Microsoft Office Communicator client will now open preconfigured with the username automatically populated. Enter your password, tick **Save my password** if required and click **Sign in**.

   NOTE: When you first sign into Office Communicator you may find a few errors reported. As long as you have set Outlook up correctly, Office Communicator will connect to your mailbox and use the free/busy information. This may take a few minutes to complete.

8. Your user list will appear (if this is the first time you have used Office Communicator you will need to add users – please see the WorkLife365 IM Quick Start Guide).Microsoft Office Communicator will now start communicating with Outlook and your WorkLife365 Email hosted mailbox.
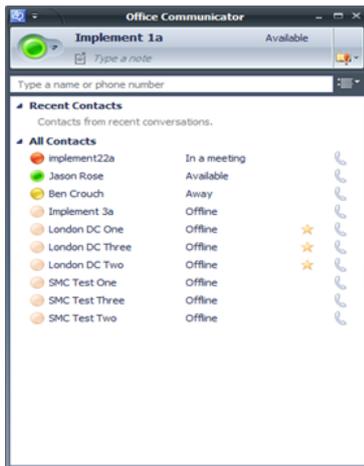
9. Open Outlook. A confirmation window will appear stating LiveMeeting for Outlook has been installed. Click **OK**, exit and reopen Outlook.

10. You have now completed the installation and setup of Microsoft Office Communicator 2007 R2 client, integration with your WorkLife365 Email (Star Business Email/Hosted Exchange) mailbox and Microsoft LiveMeeting.

If any part of the installation has failed you can rerun the install script or manually run each MSI (installer). The installers are located in the directory "Files" which is located in the same directory as **Install Office Communicator.wsf** script. The following list details the installers:

Communicator.msi - Office Communicator 2007 R2 client
LMAddinPack_x64.msi - LiveMeeting for Outlook (64-bit only)
LMAddinPack_x86.msi - LiveMeeting for Outlook (32-bit or 64-bit)
LMConsole.msi - Microsoft LiveMeeting Conferencing

4 Adding new and existing users to WorkLife365 IM

Function

Adding a new user to the WorkLife365 IM and WorkLife365 Conference services will give users access to:

- Screen/desktop sharing
- Audio & Video conference (3 or more party) calls
- Web conferencing via Live Meeting

Configuration – new user

To enable a new user follow the below configuration guide.

1. Login to https://worklife365.claranetsoho.co.uk and click Office Communications in the top navigation bar.

This will display a list of all current users who have the Office Communicator 2007 service.

	ID ⌃	Display name	Login	Sign-in address	User profile	Phone Number	Extension	Status
	1196408	Test User	test.user@mydomain.com	Testocs@mydomain.com	WorkLife IM			● Ready

2. To add the WorkLife365 IM and WorkLife365 Conference services to both new and existing accounts, click **Add New Mailbox**, then select either new or existing user. If you're adding services to an existing user, skip to step 4.

3. To add a new user, fill in the details show below.

Main

Display name
Login   @ mydomain.com ▾
Password
Confirm password

4. Enter the SIP sign in name for that user. This will default to their email address, and it is recommended that you don't change this to prevent confusion. Select the appropriate profile for the user from the drop down. Click **Next**.

General

Sign-in address   SIP: @ mydomain.com ▾
User profile   WorkLife IM Basic ▾

<< Back   Next >>   Cancel

5. You will automatically navigate to the summary page. On the summary page, check the details are correct then click **Finish**.

Configuration – existing WorkLife365 IM basic user

If a user already benefits from WorkLife365 IM basic.

6. Navigate to **Office Communications** in the top navigation bar. This will display a list of all current users who have the Office Communicator 2007 service.
7. Click the user you wish to upgrade.
8. Click **Edit** and change the user profile to WorkLife365 IM. Then click **Submit**.
9. The user should have access to the new features within an hour.

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5 How to configure Outlook 2007 manually using RPC over HTTP

1. From Start > Control Panel, select Mail and click Show Profiles.
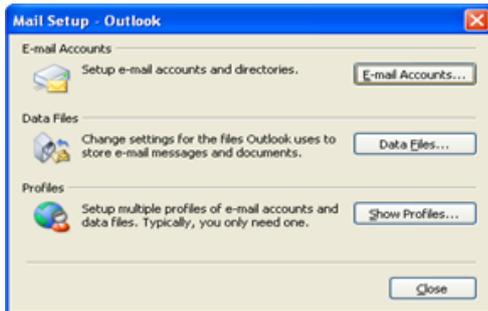
2. Click Prompt for a profile to be used and click Add.

3. Name your email profile and click **OK**.
4. Outlook Email accounts screen will appear. Tick the **Manually configure server settings** box. Click **Next**.
5. Select **Microsoft Exchange**. Click **Next**.
6. Enter **exvs01.ssp.local** in the **Microsoft Exchange Server** field. Tick **Use Cached Exchange Mode**.
   Enter your email address in the **User Name** field. Click **More Settings**.
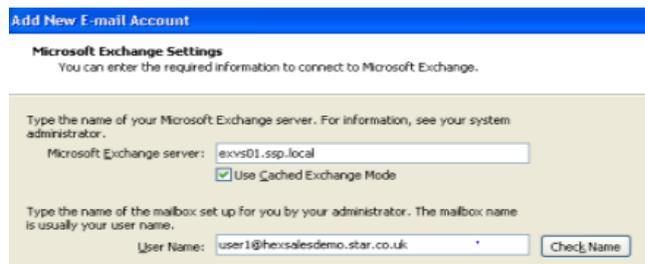
7. After a few seconds you may get an error dialog, this is normal. Click **OK**.


8. If the following dialog appears click **OK**.

9. On the following window select the Connection tab. Tick Connect to my Exchange mailbox using HTTP. Click Exchange Proxy Settings button.

10. On Exchange Proxy Settings window enter oa.email.star.co.uk next to https://. Select On fast networks and On slow networks. Under Proxy authentication settings change drop down menu from NTLM Authentication to Basic Authentication. Click OK. On the next window click OK.
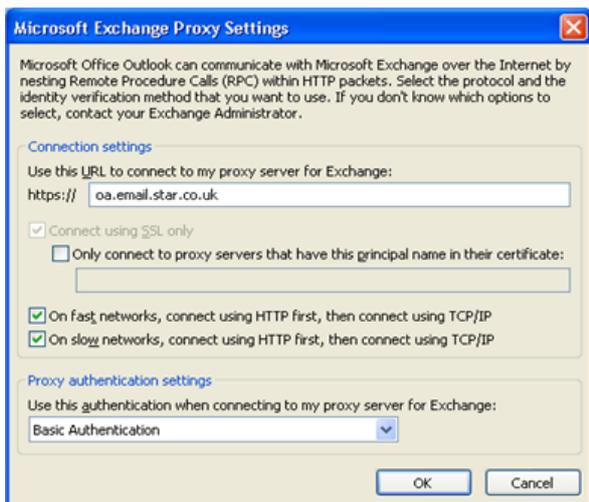
11. On E-mail Accounts window click **Check Name**. You will be asked to enter your user name and password. Enter your email address as the **User Name**. Click **OK**.

12. You should see the following (Microsoft Exchange Server and User Name will be underlined). Click **Next**.
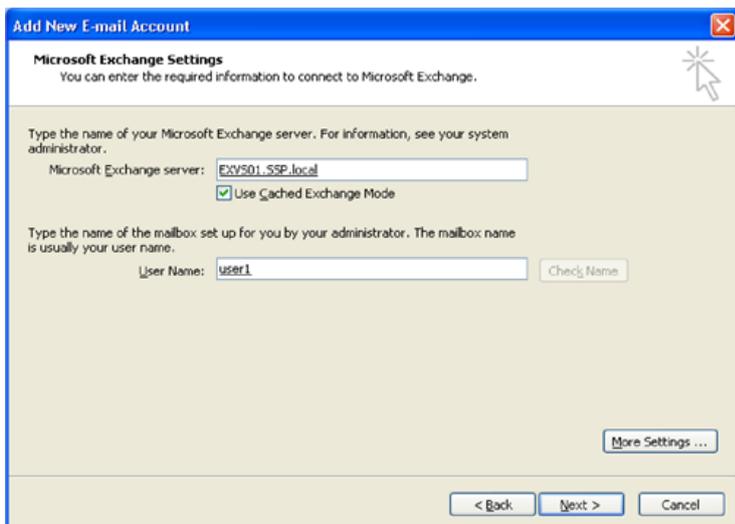
13. Your account has now been set up. Click **Finish**.

6 How to bulk upload users to the WorkLife365 control panel

Mailboxes

1. Login to the WorkLife365 control panel,
2. (**https://worklife365.claranetsoho.co.uk)** with your admin credentials.
3. Click on the **Mailboxes** link in the **Exchange** section.
4. Click **Import Mailboxes**.

	ID ^	Display name	Login	E-mail address
	Mailboxes	Contacts	Distribution Lists	Storage Usage Report	More Services

➕ Add New Mailbox   ➕ Import Mailboxes   ✖ Delete

1 total | Show Search

☐	ID ^	Display name	Login	E-mail address
☐	2395030	Test User	test@sohoworklife.co.uk	test@sohoworklife.co.uk

5. You will see the below screen. Here you can download a sample CSV from this section of the control panel. There is also a link to the format document which explains each field in the CSV file in more detail. Fill out the required fields for each of your users and then save the file in the .csv format.

Import Mailboxes   📄 Edit Help box ❓ Help

Create multiple mailboxes at once by information provided in the comma-separated-values format (CSV file).
The process of importing mailboxes is as simple as following:
   - Prepare CSV file with mailbox data (see below format description and sample CSV file);
   - Specify CSV file path below and click Next to validate its contents;
   - Review validation results and perform necessary corrections;
   - Select importing options and click Finish to import mailbox data;
   - Review importing summary. Newly created mailboxes will be fully functional and can be used by users after they get Ready status.

Import Source

CSV file   [Choose file] No file chosen

Separator   [Comma   ▼]

Encoding   [Auto-detect ▼]

Help

Format description   View ⤷

Sample CSV file   Download

[Next >>]   [Cancel]

6. Once you have saved the .csv file to your local machine, click the Browse button in the WorkLife365 control panel to navigate to the file. Click Next. A validation screen will appear. If errors occur, they can be corrected in the control panel. Click Finish to complete the import. Depending on the number of items you are importing, it may take several minutes for the creation process to complete.

Distribution Lists

Distribution lists can also be imported in bulk.

1. Login to the WorkLife365 control panel, **https://worklife365.claranetsoho.co.uk** with your admin credentials.
2. Click on the **Exchange tab** then **Distribution Lists** tab
3. Click the **Import Distribution Lists** button
4. Follow the instructions to download the sample CSV file, fill this in and save it in the .csv format
5. You are able to specify the members of each distribution list in the csv file, so it is advisable to create your mailboxes first before the distribution lists.
6. Click **Browse** to locate your saved file, and then click **Next**. A validation screen will appear. If errors occur, they can be corrected in the control panel. Click **Finish** to complete the import. Depending on the number of items you are importing, it may take several minutes for the creation process to complete.

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Contacts

External email contacts can also be imported in bulk.

1. Login to the WorkLife365 control panel, **https://worklife365.claranetsoho.co.uk** with your admin credentials.
2. Click on **Exchange** tab then **Contacts** tab
3. Click the **Import Contacts** button
4. Follow the instructions to download the sample CSV file, fill this in and save it in the .csv format
5. Click **Browse** to locate your saved file, and then click **Next**. A validation screen will appear. If errors occur, they can be corrected in the control panel. Click **Finish** to complete the import. Depending on the number of items you are importing, it may take several minutes for the creation process to complete.

Important information

Note that you cannot use the CSV import function to update the details of existing users or other Exchange objects (distribution lists or contacts) in the control panel. Therefore, if you have a large number of objects to import, it is best to include as much information as you can in the original CSV files. If information needs to be added or updated after the objects have been created in the control panel, then this will have to be done manually for each object.

7 How to grant permission to a mailbox & view it in OWA & Outlook 2007

Granting Delegate Access

1. Log in to the control panel (**https://worklife365.claranetsoho.co.uk**) with admin credentials.
2. Click on **Exchange** then **Mailboxes**.
3. Find the mailbox that you wish to grant access to in the list, and click on the name of the mailbox.

4. Click on the **Permissions** tab.

5. Click on the **Grant permissions** button.
6. Select the appropriate user or users from the list by ticking the box next to their name. All users selected will be granted Full Access to the mailbox. Once you've made the selections, click on the **Submit** button in the bottom right hand corner of the screen.
7. You will then be shown a list of the users you selected.

8. To remove permissions for a user from a mailbox, select the tick box next to the user name on the above screen, then click on the **Revoke Permissions** button on the right hand side.
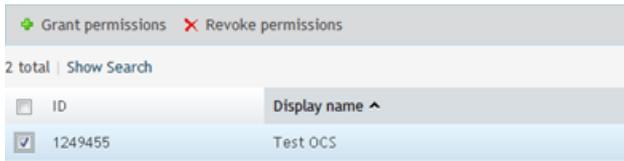
How to open additional mailboxes in OWA

1. To access Outlook Web Access go to **https://oa.email.star.co.uk/owa**
2. Select the appropriate choice from **This is a public** or shared computer or **This is a private computer** then enter your email address and password for your Exchange email account and click **Log on**.
3. Once logged in, click on your username in the top right hand corner of the window, which will open a small window where you can enter the name of additional mailboxes:
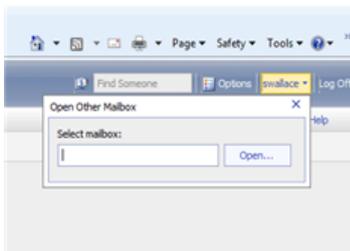
4. Enter the name of the mailbox, which in this case is demo. This will then open the mailbox in an additional browser window. From here you can view all the mails in the mailbox.
5. If you see the below message, then you have not been granted the correct permissions in the control panel to allow you to view this mailbox. Check your permissions and then try again.
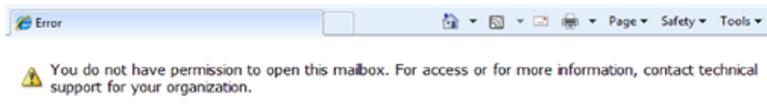
How to open additional mailboxes in Outlook 2007

1. Open your Outlook 2007 client.
2. Right-click on the top folder item, which should be in the form of **Mailbox –** *username* and select **Properties for Mailbox –** *username*.
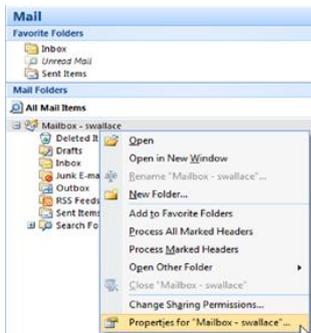
3. On the window that appears, click the **Advanced** button in the bottom right corner.
4. Another window will open. Click on the **Advanced** tab.

5. Click on the **Add** button and in the box that appears, type the email address of the mailbox you wish to add. Click on **OK**.

6. You will then see the mailbox in the list. If necessary you can add another mailbox. When finished, click on **OK** and then **OK** again to return to your main Outlook screen.

7. You will then see the mailbox at the bottom of your list of mail folders.

8. This will add the additional mailboxes to your profile, so they will always appear when you open Outlook. To remove additional mailboxes, follow the above procedure, however at step 4, click on the name of the mailbox you wish to remove in the list and click the **Remove** button.
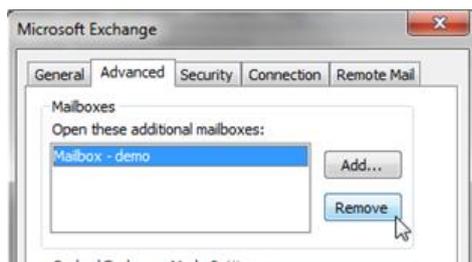
8 How to create and import public folders

How to create and import public folders

1. Log into the control panel **https://worklife365.claranetsoho.co.uk** with admin credentials.

2. Click on the **Exchange** tab, then click **More Services > Public Folders**. This will show a list of all your public folders created in or imported into the WorkLife365 control panel

3. To create a public folder, click the **Add New Public Folder** button.

Parallels Panel > Exchange >

Public Folders

Root public folder of the organiz

➕ Add New Public Folder ➕

1 total | Show Search

4. Select the appropriate parent folder. If you haven't setup any public folders previously, the only choice will be . Select an appropriate name for the folder, the maximum size, and the default role that all users will be given to it. It is recommended that you leave the default permission as **Reviewer** - specific permissions can be amended later. The **All Exchange Users** group is automatically given the default rights to this initial folder. You can also choose whether or not the folder will be mail-enabled, i.e. whether you can email content directly to it.

Note: Mail-enabling a folder does not use up one of your mailbox allocations; however the size limit will be deducted from your overall Exchange disk space limit.

Add New Public Folder

Fill properties of the public folder being created. Please note that it will not b

General

Public Folder Name	Public folder
Items Type	Mail Items
Size Limit	200 ✕ MB
	Available mail storage size: 251,876 MB; Ma
Default Role	Reviewer ▾
	Select a role that all mailbox users in your Exchange users' system distribution list, so the public folder details.

Mail-Enabled

☐ Mail-Enabled

<< Back | Finish | Cancel

When you are happy, click **Finish** to apply the settings.

5. The public folder creation task will run. Click on **Refresh** to check the status.
6. Once you have created at least one public folder, you are able to click on its name in the list, which will take you to a screen where you can amend its settings (see below), such as adding permissions, adding email aliases, changing size limits and adding it to a distribution list. Some of these settings are only visible when the public folder is mail-enabled.

Note: If you want to grant Send As rights to a mail enabled public folder for a specific user, the public folder must have the Show in address book option ticked.

Note: Permissions can ONLY be controlled through the control panel. Permissions to a WorkLife365 public folder cannot be granted or changed from Outlook or OWA.

Parallels Panel > Exchange > Public Folders >

Test

General	Permissions	Limits

General

Public Folder Name	Test
Items Type	Mail Items
Default Role	Contributor

Mail-Enabled

Mail-Enabled	⊙ No

Edit | Delete

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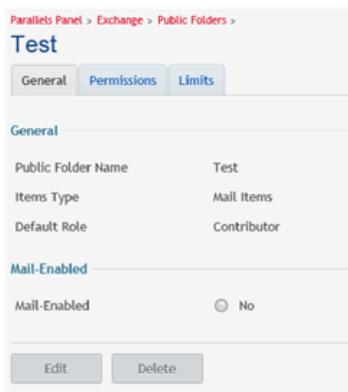
7. You will then be able to view the public folder in Outlook by clicking the **Folders** option in the bottom left of the Outlook screen.

Outlook 2007:

Outlook 2010:

8. The public folder structure will then be visible at the bottom of your list of email folders. The root folder will have a name with the format, P00100xxxx

How to create a new service user in the WorkLife365 control panel

1. Log in to the WorkLife365 control panel(https://worklife365.claranetsoho.co.uk/single.html) with your WorkLife365 admin credentials. Once logged in, you will see the home page as shown below.

2. Click on the **Users** tab.
3. Click **Add New Service User**
4. Enter the user details. Tick the boxes in the **Services** section to add these to the user account, e.g. to create a mailbox tick the Exchange box. If you have Sharepoint, OCS or Dynamics CRM in your subscription, you can tick the relevant boxes to grant the new user access to these as required. Click **Next**.
5. Depending on which services you ticked you will be taken through the setup screens for each in turn. There is more detailed documentation available for each WorkLife365 service. The most common setup screens are shown below. Click **Next** on each to progress

6. A summary screen will appear. Confirm all details are correct and then click **Finish**.
7. The status of the account creation will follow. Review the details and continue.
8. Account creation has now completed.

9 How to connect an Apple iPhone to a WorkLife365 account

Note: Please note that if you are running v4.0 of the iPhone operating system on your iPhone, you should upgrade to a later version - v4.0.1 or v4.0.2. This is because of a known issue with v4.0 of the software which causes synchronisation issues with Exchange. See the below link for more information:

http://support.apple.com/kb/TS3398

Features

ActiveSync is included with the latest versions (v2.0 and later) of the iPhone software. This means you can now do even more with your Hosted Exchange mailbox using your iPhone.

Features include:

Push email

Push contacts

Push calendar

Global Address List (GAL) support

Device configuration

Remote wipe

Microsoft Exchange features that are NOT supported on the iPhone include:

• Folder management
• Task synchronization
• Creating meeting invitations
• Flagging messages for follow-up
• Setting an "out of office" auto reply message
• Opening links in email to documents stored on
SharePoint servers

For those who have an original iPhone, an update is available for download that will add ActiveSync to your phone by upgrading the software and firmware to version 2.0.

Note: It is assumed that your iPhone is running software version 2.0 prior to your going forward with these steps. If your iPhone is not running version 2.0 of the software, you will need to update the device via iTunes prior to proceeding.

Steps

The first step is to ensure that ActiveSync access is switched on for the specific user who wishes to use their iPhone to access their email. To do this, log in to the control panel with administrator privileges and click on **Exchange > Mailboxes**.

Click on the name of the user that you want to setup, and on the General tab in the Mailbox Access section, ensure that Active Sync is ticked.

The rest of the steps are taken on the iPhone itself.

Click the **Mail** icon on the home screen to start email configuration.

Click **Microsoft Exchange**. The mail settings screen will appear.

Fill in the details as below:

Email: The user's email address

Domain: Leave this blank

Username: The user's email address

Password: The user's email account password

Description: Hosted Exchange

If the Autodiscover service is not configured then the iPhone will prompt for the server address which is oa.email.star.co.uk.

You will then be prompted for which mailbox features you want to synchronise with the iPhone. **Note that if you do choose to sync Contacts and Calendars, all existing contact and calendar information on the iPhone will be overwritten.**

Tap **Done** and the iPhone will finalize the configuration and return you to the **Mail, Contacts, Calendars** menu while your iPhone communicates with the server.

Note that by default, only 3 days' worth of email is synchronized. To synchronize more, go into Settings, then Mail, Contacts, Calendars, select your Exchange account, and tap on Mail days to sync.

Troubleshooting

10 How to view another user's mailbox or mail folder in Entourage 2008

Once a user has been given Full Mailbox Access to the mailbox in question, they will need to make the following changes in Entourage:

1. Click on **Tools > Accounts**, and then click the **Exchange** tab on the right.
2. Select your Exchange account then select **Edit** or double-click its name.
3. Click the **Delegate** tab, then click the **Advanced** button at the bottom of the page in the **Users I am a delegate for** section.

4. This will show the below screen. Fill in the information as indicated below:
5. **Name:** Enter the display name of the delegate mailbox.
   E-Mail Address: Enter the user's e-mail address
   Server Address: Enter the same server address you use to connect to your account in Entourage. It can be found on the 'Account Settings' tab under 'Exchange server address'. You will need to substitute your email address with the email address of the user you are a delegate for. The format should be **oa.email.star.co.uk/exchange/DelegateEmailAddress**. You will need to tick the box labelled **Requires a secure connection (uses SSL)**.
6. When you select **OK** on both menus you will be taken back to your main screen. You should have a new item under your mailbox with the name of the delegate mailbox and you should be able to access their mailbox.

View another user's folder

If you have been granted access to another user's folder, e.g. their inbox or calendar, then you can open this via Entourage as follows.

1. Within Entourage, click on the **File** menu and select **Open Other User's Folder**.
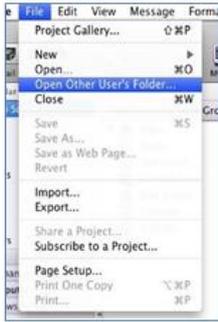
2. You will see the below screen. Click the icon to the right of the **User** field to view your address book.
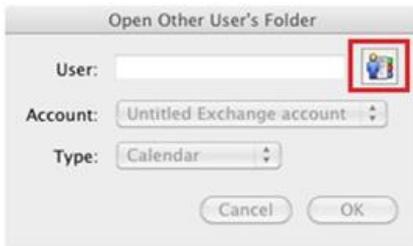
3. On the Select User window, click the **Advanced** button in the bottom left hand corner.
4. In the **Advanced Settings** window, enter the user details in the format shown below. Click **OK**.

5. The folder that you have permissions to view will then show in your list of folders on the left side of Entourage.

11 Recovering deleted items

Recovering Deleted Items in Outlook 2010

When you delete an item from your mailbox, it is automatically transferred to the **Deleted Items** folder. From here you can then choose to empty this folder. Alternatively, you can bypass the above step by selecting the item you want to delete, holding down the **Shift** key and then pressing **Delete**.

In both cases, you can recover items for a period up to 45 days from when they were deleted. After this time the items will not be recoverable.

To recover the items, see the following steps:

1. To recover items, including the **Deleted Items** folder, select the folder from which the item was deleted, i.e. if you **Shift + Delete** an item from the **Inbox** folder, select the **Inbox** folder to recover it.
2. Click on **Folder** on the Ribbon bar and select **Recover Deleted Items**:
3. The **Recover Deleted Items** window opens. At the top it shows which folder you are attempting to recover items from (in the below example, it is the **Deleted Items** folder). You can either Select All items 🔳, or you can select multiple specific ones. You can then choose either the Purge Selected Items icon ✕ which will permanently delete the selected items, or the Recover Selected Items icon 📨 .
4. If you select Purge Selected Items you will see the below warning, confirming the permanent delete.
5. If you select the **Recover Selected Items** icon, this will restore the items to the folder that they were deleted from originally,
6. i.e. in the below example the item selected will be restored to the **Deleted Items** folder.
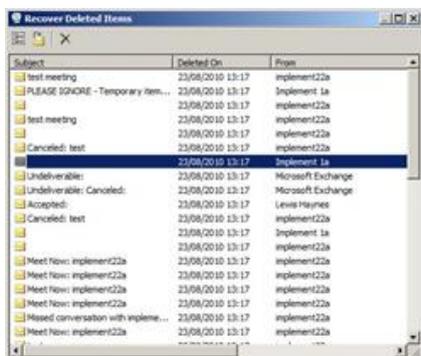
The Recover Deleted Items tool is available on any folder or subfolder in your mailbox. It is not available on any shared mailboxes that appear in your Outlook client.

Recovering Deleted Items in OWA

The ability to recover deleted items from OWA is also available, however only items that were emptied from the **Deleted Items** folder can be recovered. As with the full Outlook 2010 client, only items deleted within the last 45 days are recoverable.

1. Log in to OWA and select Options from the menu in the top right hand corner
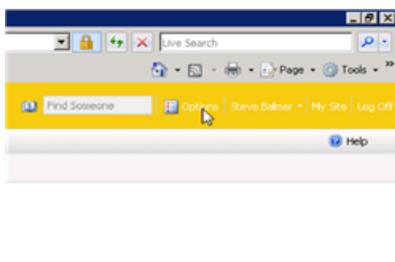
2. In the left hand pane, click on **Deleted Items**.
3. In the **Recover Deleted Items** section, you will see those items that can be recovered, and you have the option to either **Recover to Deleted Items Folder** or **Permanently Delete** the items you select.

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4. Selecting **Recover to Deleted Items Folder** will move the selected items to the **Deleted Items** folder within your mailbox.

12 <u>How to export</u> to a PST file from Outlook

1. From within Microsoft Outlook 2007 select **Import and Export** from the **File** menu.
2. This will open the **Import and Export Wizard** screen. Select **Export to a file** and click on the **Next** button.
3. Select **Personal Folder File (.pst)** and click on the **Next** button.
4. You will then see the below screen where you can select the folders to export from. To export your entire mailbox, select **Mailbox - *username*** at the top of the folder list, and make sure that the **Include subfolders** box is ticked. If the email account you are exporting from is not a Microsoft Exchange account then the top level folder may be called **Personal Folders**.

5. On the **Export Personal Folders** screen click the **Browse** button to select the location and filename of the pst file which will be created. If you have selected to export to an existing pst file, choose the relevant option from the 3 regarding handling duplicate items. Click **Finish** when done.
6. You will then be prompted to enter a display name for the pst file, and whether you want to set a password to protect it. Click on **OK** to start the export process. Depending on the size of your mailbox, this process may take some time.

13 How to view and update Mailbox size limits

Total disk space allocated to your organisation

The following steps show how you can view the amount of disk space that has been allocated to your organisation.

1. Log into the WorkLife365 control panel https://worklife365.co.uk with admin credentials.
2. Click the **Exchange** tab and then the **Storage Usage Report** tab. This will show you the below summary page of your organisation's resource allocation and usage. At the top you can see the total space assigned

to your organisation for mailboxes and public folders. Click the **Update Usage Info** button to ensure the latest information is displayed.

Amend user's mailbox size

1. Click the Mailboxes link in the Exchange section on the home page of the control panel. This will show you an overview of all current mailboxes in your organisation and their size, as well as showing the maximum mailbox size that has been set.

2. Click the Display name of the mailbox you wish to modify. Click the Limits tab.
3. Click the Edit button at the bottom of the page.
4. You can change the size at which the user will get a warning, and also the size at which they will no longer be able to send mails (they will however, still be able to receive them). There is a short description below each field explaining its usage.

You can also change the maximum mailbox size for each user. As mailbox space is assigned across your entire organisation, if you have reached the limit of your storage space, the administrator could decrease one user's mailbox size in order to free up space that could then be allocated to another mailbox. The control panel will display the amount of mail storage space still available to you, below the Size limit field. The maximum mailbox size allowed by the control panel is also displayed here.

Troubleshooting issues with increasing mailbox limits

If you try to increase a particular mailbox size limit and get a warning message in the control panel, it may be that you have run out of allocated disk space. To check this, log in to the control panel, click on the Exchange tab and then click the **Storage Usage Report** tab.
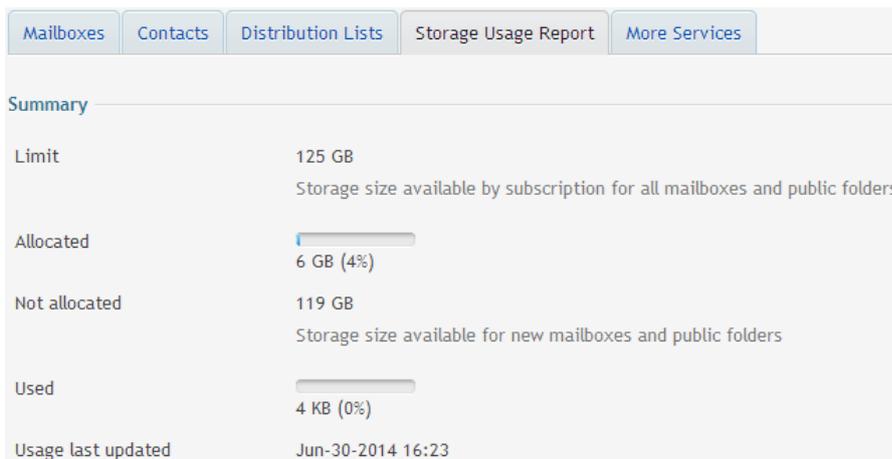
The **Allocated** line shows how much of your Exchange disk space has been allocated to existing mailboxes and public folders, regardless of the actual usage. The allocation of storage space is not dynamic, i.e. once you set a limit on a mailbox, that amount of disk space is fixed for that mailbox and cannot be used by another, even if the actual used size of the mailbox is well below the limit set.

Therefore if the **Allocated** amount is near to, or at 100%, you won't be able to increase a mailbox size limit, even though the actual usage value (as shown in the **Used** line) may appear to show you have plenty of space. The amount of space available to allocate to mailboxes and public folders is shown in the **Not Allocated** line.

To resolve this, you will need to decrease the mailbox allocation for a mailbox (or several) in order to be able to allocate more space to another mailbox. Alternatively, you can contact your Claranet SOHO **sales representative** to order more WorkLife365 Exchange disk space.

In some cases the **Storage Usage Report** page indicates that you have enough free space (as shown in the **Not Allocated** line) but you see the following error message when trying to allocate the required amount to a mailbox:

This indicates that the mailbox store on the Exchange server that the specific mailbox resides on is full. In this case, please log a support request.

Importing public folders

Once you have created at least one public folder you are given the option to **Import Existing Folders** in the **Public Folders** section of the control panel. This allows you to import public folders that have been manually created within Outlook or OWA. This method can also be used to import public folders that were created and migrated from another email   platform.
Note: Only users with the Publishing Author permission level or higher are able to create public folders within Outlook or OWA.

1. Clicking on the **Import Existing Folders** button will display a warning message.

Note: In addition to changing all Owner permissions to Publishing Editor, all other existing permissions will be replaced with the permissions of the parent folder, therefore you may have to manually add permissions to each folder once the import has completed. Once imported, folder permissions can ONLY be administered through the control panel. Click on OK to proceed.
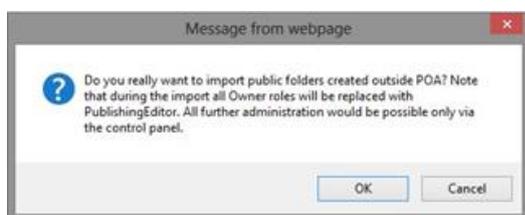
2. After clicking **OK**, the below message is displayed at the top of the screen.

3. Click on the **Refresh** link in the top right hand corner to view the imported folders. You may need to click this link a few times before the displayed list is up to date. Folders are displayed with different levels of indentation to represent the folder hierarchy.
4. To delete public folders, tick the box next to the folder that you wish to delete and click the **Delete** button to the right of the screen. You must have Owner rights to the folder in order to delete it from the control panel.

Note: You cannot delete a folder if it has sub-folders. You must delete the sub-folder first before you are able to delete   the   parent   folder.
The control panel displays the following message at the top of the screen. Click the **Refresh** link to display the updated list.
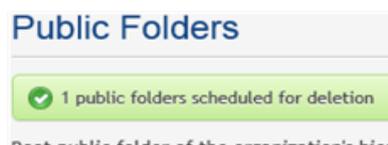
If a user is the owner of a public folder that has previously been imported into the control panel, that user will be able to delete the folder from their Outlook or OWA client, but this change won't be replicated in the control panel, i.e. the folder will still show in the control panel. The folder will have to be deleted from the control panel using the above method.

We therefore recommend that Publishing Editor is the highest permission level that you grant to users, as this will enable them to perform all required tasks. See the below screen shot of the message displayed on the control panel when you click the **Import Existing Folders** button.

14 Recovering Deleted Items from Outlook 2007 and Outlook Web Access

Within Outlook 2007 and OWA, there is a built-in function to allow the recovery of deleted items in the event that they were deleted accidentally. This document will describe how to recover these items, first when using the Outlook 2007 client, and then when using OWA.

Recovering deleted items from Outlook 2007

When you delete an item from your mailbox, it is automatically transferred to the **Deleted Items** folder. From here you can then choose to empty this folder. Alternatively, you can bypass the above step by selecting the item you want to delete, holding down the **Shift** key and then pressing **Delete**.

In both cases, you can recover items for a period up to 45 days from when they were deleted. After this time the items will not be recoverable. To recover the items, see the following steps:

9. To recover items, including the **Deleted Items** folder, select the folder from which the item was deleted, i.e. if you **Shift + Delete** an item from the **Inbox** folder, select the **Inbox** folder to recover it.
10. Click on **Tools** on the menu bar and select **Recover Deleted Items:**
11. The **Recover Deleted Items** window opens. At the top it shows which folder you are attempting to recover items from (in the below example, it is the **Deleted Items** folder). You can either **Select All** items , or you can select multiple specific ones. You can then choose either the **Purge Selected Items** icon which will permanently delete the selected items, or the **Recover Selected Items** icon .
12. If you select **Purge Selected Items** you will see the below warning, confirming the permanent delete:
13. If you select the **Recover Selected Items** icon, this will restore the items to the folder that they were deleted from originally, i.e. in the below example the item selected will be restored to the **Deleted Items** folder.
14. The **Recover Deleted Items** tool is available on any folder or sub-folder in your mailbox. It is not available on any shared mailboxes that appear in your Outlook client.

Recovering deleted items from Outlook Web Access 2007

The ability to recover deleted items from OWA is also available, however only items that were emptied from the **Deleted Items** folder can be recovered. As with the full Outlook 2007 client, only items deleted within the last 45 days are recoverable.

15. Log in to OWA and select Options from the menu in the top right hand corner.
16. In the left hand pane, click on **Deleted Items**.
17. In the **Recover Deleted Items** section, you will see those items that can be recovered, and you have the option to either **Recover to Deleted Items Folder** or **Permanently Delete** the items you select.
18. Selecting **Recover to Deleted Items Folder** will move the selected items to the **Deleted Items** folder within your mailbox.

15 End users - Grant permissions to view and send as a mailbox

The following sections explain how a user can grant access to their mailbox for other users. Grant permissions to view your mailbox

1. Log into the WorkLife365 control panel, https://worklife365.claranetsoho.co.uk with your user credentials.
2. Click the **Exchange Mailbox** tab, and then click on the Permissions section. Click the **Grant permissions** button.
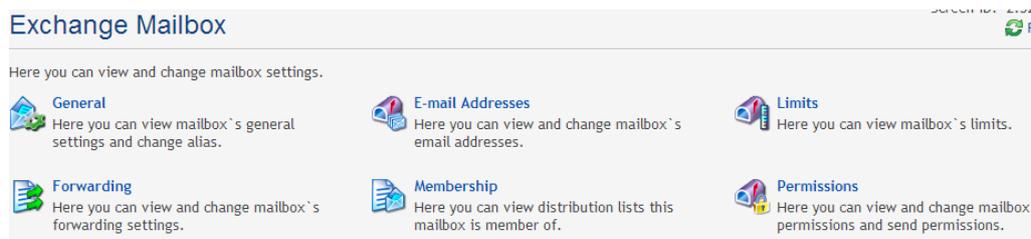
3. Select the user(s) or Distribution List(s) you wish to grant access to your mailbox by ticking the box next to the name. Click **Submit**.
4. The list will then display the users and Distribution Lists which have been granted mailbox access.
5. To remove permissions, tick the box next to the name and click the **Revoke permissions** button.

Grant permissions to send as your mailbox

1. Log into the WorkLife365 control panel, https://worklife365.claranetsoho.co.uk with your user credentials.
2. Click the **Exchange Mailbox** tab, and then click on the user you want to change permissions for. Click on the **Permissions** section, then click on the **Send permissions** tab.

3. Click the **Grant permissions** button.
4. For the user(s) or Distribution List(s) you wish to grant send permissions to this mailbox, select **Send-As** or **Send On Behalf** from the Send Permission drop down menu to the right of their name. Click **Submit**.
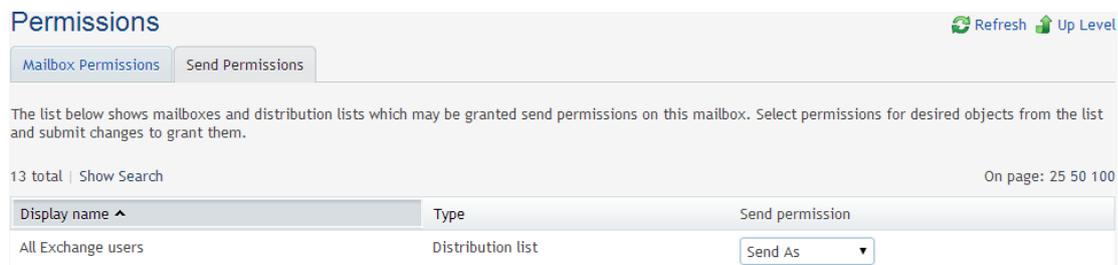
Granting delegate access to your mailbox with Outlook 2007

1. Open your email account via Outlook. You will not be able to grant delegate access via Outlook Web Access
2. Click on **Tools > Options**.
3. This will show the below window. Click on the Delegates tab.
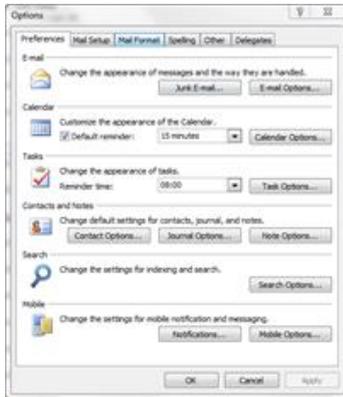
4. Click on the Add button next to the Delegates pane (as shown below).

5. This will display your organisation's global address list. Select the user or users to whom you wish to grant permission to your mailbox from the list, then click on the **Add** button at the bottom of the window. Alternatively you can double-click on a name in the list to add them. Once you have selected all the users you wish to grant delegate access to, click on the **OK** button.
   You will then be presented with the following window, where you can select from the dropdown menus the level of access to each area of your mailbox. Select the appropriate permission level for the delegate and click on **OK**. You can also check the boxes to email the settings to the delegate, and if you want the delegate to view items marked as private in your calendar.
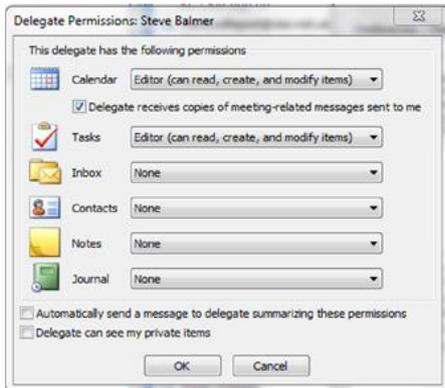
6. Once you have set the permission levels for all the users that you selected, you will then see a summary listing as shown below. You can select additional features related to meeting messages at the bottom of this window, or you can add other delegates. To change the permission level or remove a delegate from the list, click the user name and then click the appropriate button on the right hand side. Click on **OK** to apply the changes.
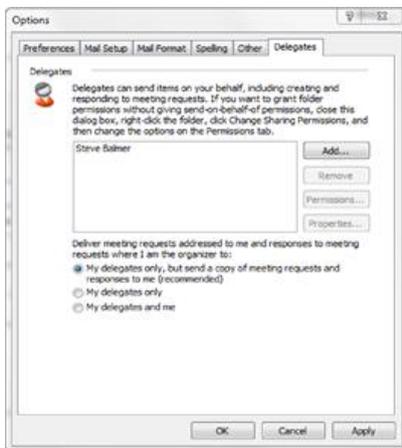
7. The delegate can then view the relevant folder in their Outlook client by clicking on **File > Open > Other Users Folder.**
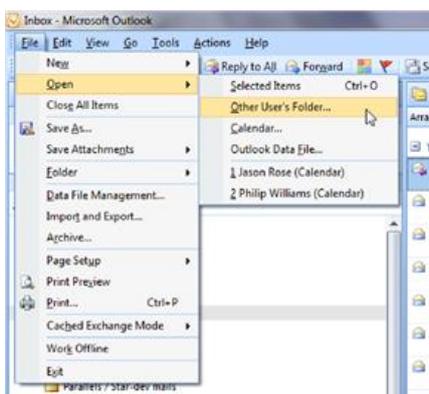
8. Type in the users name, select the folder to which you have been granted permission, and then click **OK**.
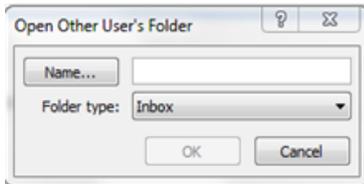
19. To view the folder in Outlook Web Access, open your browser and enter the following URL, substituting the text in italics with the appropriate details:

https://oa.email.star.co.uk/owa/*otherusersemailaddress*/?cmd=contents&f=*otherusersfolder*

You will be prompted to provide your details for your email account, and the specified folder will then open in the browser window.

Granting Delegate access to your mailbox

1. Open your email account via Outlook. You will not be able to grant delegate access via Outlook Web Access
2. Click on **File > Info > Account Settings > Delegate Access**.

3. Click on the **Add** button next to the Delegates pane (as shown below).

4. This will display your organisation's global address list. Select the user or users to whom you wish to grant access to your mailbox, then click the **Add** button at the bottom of the window. Alternatively you can double-click on a name in the list to add them. Once you have selected all the users you wish to grant delegate access to, click the **OK** button.
5. You will then be presented with the following window, where you can select from the drop-down menus the level of access to each area of your mailbox.
6. Select the appropriate permission level for the delegate and click on OK. You can also check the boxes to email the settings to the delegate, and if you want the delegate to view items marked as private in your calendar.
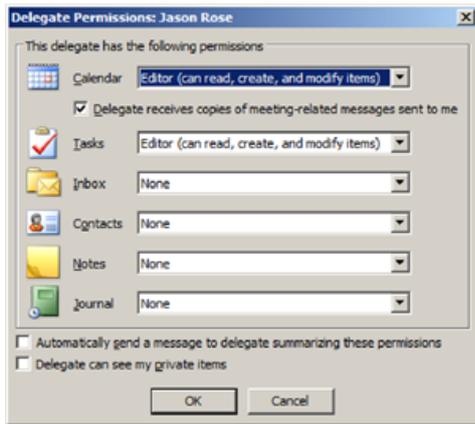
7. Once you have set the permission levels for all the users that you selected, you will then see a summary listing as shown below. You can select additional features related to meeting messages at the bottom of this window, or you can add other delegates. To change the permission level or remove a delegate from the list, click the username and then click the appropriate button on the right hand side. Click on **OK** to apply the changes.

8. The delegate can then view the relevant folder in their Outlook client by clicking **File>Open>Other Users Folder**.
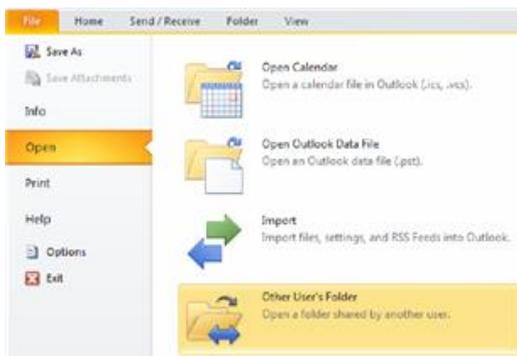
9. Type in the user's name, select the folder to which you have been granted permission, then click **OK**.

10. To view the folder in Outlook Web Access, open your browser and enter the following URL, substituting the text in italics with the appropriate details:

https://oa.email.star.co.uk/owa/*otherusersemailaddress*/?c md=contents&f=*otherusersfolder*

You will be prompted to provide your details for your email account, and the specified folder will then open in the browser window.