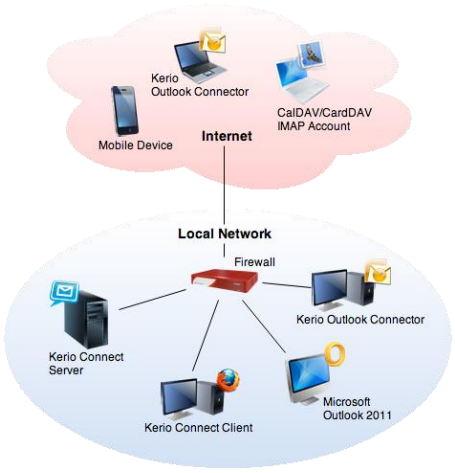
Quick Installation Kerio Connect

Introduction

This article provides a guide to deploying Kerio Connect. We'll use this scenario as an example:



In this example:

- Kerio Connect is installed on a dedicated server (the operating system does not host other services).
- There is a dedicated Internet connection with a static IP address and adequate bandwidth
- A single email domain is used (example.com), and the server's internet hostname is mail.example.com
- User accounts are authenticated against a local Kerberos domain (example.local).
- The same email access policy is applied to both the local network, and Internet based accounts.
- Secure connections (SSL) are required for all types of mailbox access.
- A signed SSL certificate is installed.
- Spam and virus filters are enabled and configured
- All processed email is archived.
- All data (including configuration) is backed up nightly.
- Mail retention and size-limit policies are applied.
- The organization has several meeting rooms, which are scheduled and managed as resources in Kerio Connect.
- A read-only contact directory (global address list) and a calendar of the organization's events and holidays are maintained.
- There are several mailing lists for various teams within the company.
- There are also several email aliases that are sorted automatically into public folders .
- A variety of mobile devices are used to wirelessly synchronize mailbox data.
- Mailboxes are managed from desktop operating systems using the recommended groupware applications.
- The company uses instant messaging for real-time communication and presence.
- Data is migrated from an existing email hosting provider to Kerio Connect.

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Selecting a deployment type

Kerio Connect is available as a 32- or 64-bit software application for recent versions of Microsoft Windows, Mac OS X, and Linux.

For VMware environments using ESX or ESXi, consider the Kerio Connect virtual appliance edition.

For a detailed list of supported platforms, refer to the system requirements (click Tech Specs).

Features and functionality are identical across platforms, so you can choose any deployment type which works best in your environment.

Installing or upgrading Kerio Connect

Once you select a deployment option and prepared the operating system, you are ready to install Kerio Connect. See Installing Kerio Connect.

By default, Kerio Connect regularly checks for new versions. When an update is available, the administrator is notified when logging in. To complete an update, download the complete installation package and run the installer. See Upgrading Kerio Connect.

Accessing Kerio Connect

After installation, Kerio Connect configuration is managed through a web interface, which is accessed by the server name or IP address, followed by**/admin** (for example, http://mail.example.com/admin).

A web interface (Kerio Connect client) provides end users with a number of tools including mailbox access. To access the client, they enter the server name or IP address into the address field of a supported web browser. See Accessing Kerio Connect.

Creating and viewing public folders

Public folders allow multiple users to share the same content, including calendars, contacts, tasks, notes, and email.

Since the information can be accessed by multiple users, you assign access rights to individual folders. For security reasons, users are typically given read-only access to public folders. Any user can be designated as a public folders administrator (under **Accounts** → **Users**).

Public folders are accessed and managed from any of the supported applications, including Microsoft Outlook and the Kerio Connect client.

In our example, we log into the Kerio Connect client as the admin user to create new public email folders called **Orders**, **Faxes**, and **Jobs**. We also create two calendar folders called **Events** and **Holidays**. These folders are created in the **Calendar** section by clicking the arrow next to **Public folders**and selecting **New calendar**. In the **Contacts** view we see a **Contacts** folder, which contains the contact information of users published from the user directory, and a folder called **Resources**, containing the three folders we created: **Orders, Faxes, Jobs**.

For more information, see Creating public folders and Viewing public folders.

Configuring email domains

Domains are managed in Kerio Connect administration under **Configuration** → **Domains**.

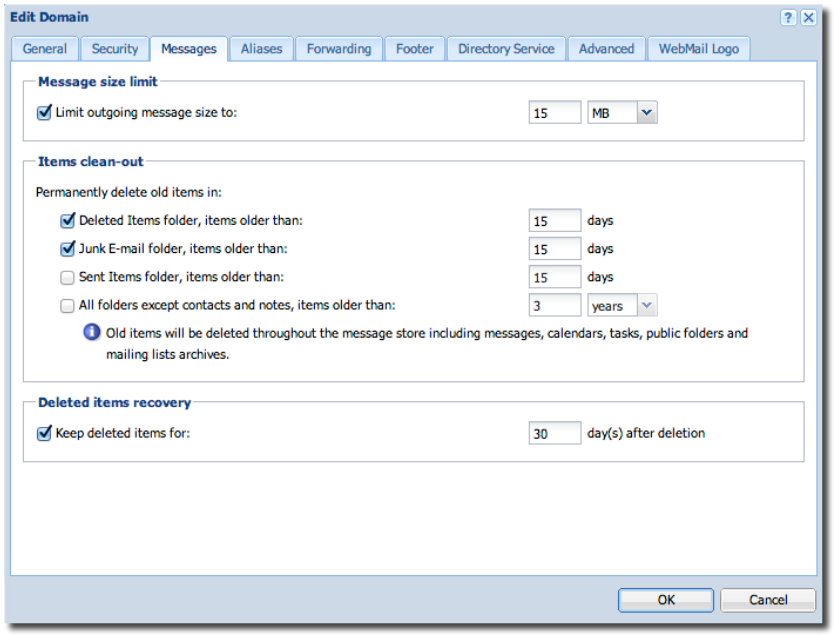
In our example, the Internet hostname is mail.example.com, and the email domain name is example.com.

Additional (per domain) options include aliases, footers, retention policies, and password policies.

We apply the following policies to the example.com domain:

- Messages that have been deleted within the last 30 days can be recovered.

- Deleted items, or messages flagged as spam will be automatically deleted after 15 days.
- Outgoing messages are restricted to a maximum of 15 MB.



Connecting to a directory service

To simplify user management and password controls, we map user accounts and passwords with a local directory server. This means joining the local operating system of Kerio Connect to the Kerberos domain.

We install an extension to the directory server, which allows Kerio Connect to store user properties in the directory server's hierarchy of information (schema).

Kerio Connect schema extensions are available for **Microsoft Active Directory** and **Apple Open Directory**.

After installing the schema extension, we configure Kerio Connect to authenticate against the directory server. These settings are located in the properties of each email domain (such as example.com), under the **Directory Service** and **Advanced** tabs.

For details on configuring directory services, see Connecting Kerio Connect to a directory service.

Creating user accounts and aliases

Users are managed in the **Accounts** → **Users** section of the administration.

We add users as local accounts managed by the Kerio Connect configuration, or as mapped accounts from a Directory Service.

See Creating user accounts in Kerio Connect.

User contact details are published to the **Public Contacts** folder (global address list) where they are accessed by supported applications and mobile devices.

Aliases allow incoming email to be delivered to a single or to multiple mailboxes. They can also be redirected to an external email address or delivered into a designated public folder. Aliases are configured per domain in the **Accounts** → **Aliases** section.

In this example, we have the alias postmaster@example.com, which we deliver to the mailbox for the admin account. We also have the aliases**Faxes**, **Orders**, and **Jobs**, which we deliver to corresponding public folders.

For details on configuring aliases, see Creating aliases in Kerio Connect.

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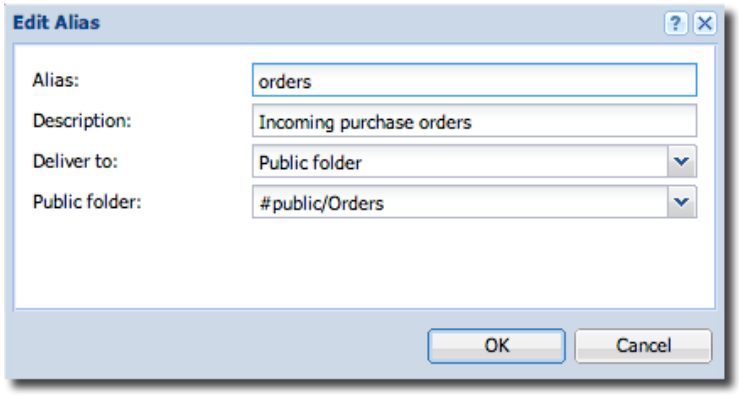


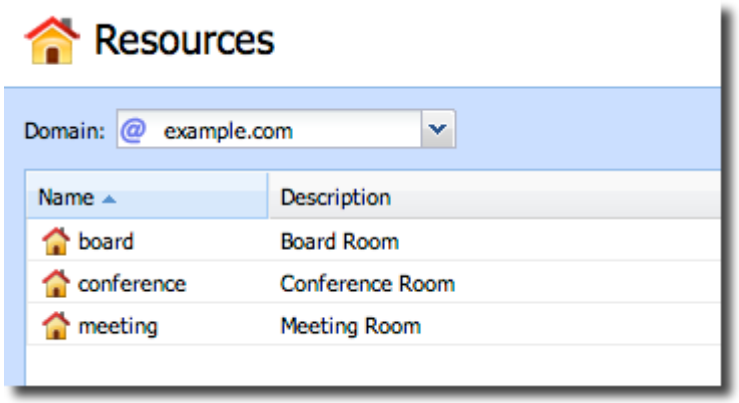
Configuring resources

Resources are configured per domain under **Accounts** → **Resources**.

In the example.com domain, we configure three resources. These resources appear as contacts in a public folder called **Resources**.

Users can access availability information and schedule (reserve) resources from any of the supported calendaring applications.

For more information, see Configuring resources in Kerio Connect.



Creating mailing lists

To improve communication between teams, we create mailing lists, which are defined in **Accounts** → **Mailing Lists**.

In the example.com domain, we create three lists:

- marketing-team
- sales-team
- support-team

Users join the list by directing a blank email to <*mailing_list_name*-subscribe>@<*domain*> (e.g. sales-team-subscribe@example.com).

Each mailing list has several options, including policies for posting, replies, subscription, and moderation.

See Creating mailing lists in Kerio Connect.

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Securing Kerio Connect

In our example, Kerio Connect is behind a firewall, and a policy allows remote access to all secure Kerio Connect services.

Firewall policies

To enable remote access to services, we ensure that certain ports are allowed by the firewall.

See Services in Kerio Connect.

Encryption

All connections to Kerio Connect are secure (encrypted). To enforce this policy, we choose the option **Require encryption connection**, located in**Configuration → Security**.

For more on security policies in Kerio Connect, see Securing Kerio Connect and How to configure security options of the SMTP server.

Certificates

Since users are connecting securely via Secure Sockets Layer (SSL), we obtain a trusted certificate to ensure the authenticity of the mail server's Internet hostname (mail.example.com). A trusted certificate can be configured from **Configuration -> SSL Certificates** (**New Certificate Request**). This generates a request that must be authorized and signed by a Certificate Authority (CA). The signed certificate is installed using the option **Import Signed Certificate from CA** and then the certificate is set as active.

See Configuring SSL certificates in Kerio Connect.

Authentication with DKIM

To improve the reliability of mail delivery, we sign messages using **DomainKeys Identified Mail** (DKIM). This requires special Domain Name System (DNS) configuration, which is set up on the authoritative DNS server for the email domain (example.com). DKIM is enabled in **Configuration → Domains** (then we edit the selected domain).

For details on DKIM configuration, see Authenticating messages with DKIM and Configuring DNS for DKIM.

Configuring virus and spam control

Antivirus

For added security, all processed messages are scanned by an integrated antivirus engine powered by Sophos. If licensed, the feature is enabled and does not require any special configuration.

For more on the Sophos antivirus feature, see Antivirus control in Kerio Connect.

Spam control

Kerio Connect integrates an anti-spam technology called SpamAssassin, which evaluates the content of incoming email and assesses a score. If the score exceeds a defined threshold, it is automatically sorted into the recipient's junk email folder. SpamAssassin is designed to improve its accuracy over time, based on observation of scanned messages, and feedback from users. Any user can help to train the spam filter by moving messages between their junk folder and the inbox.

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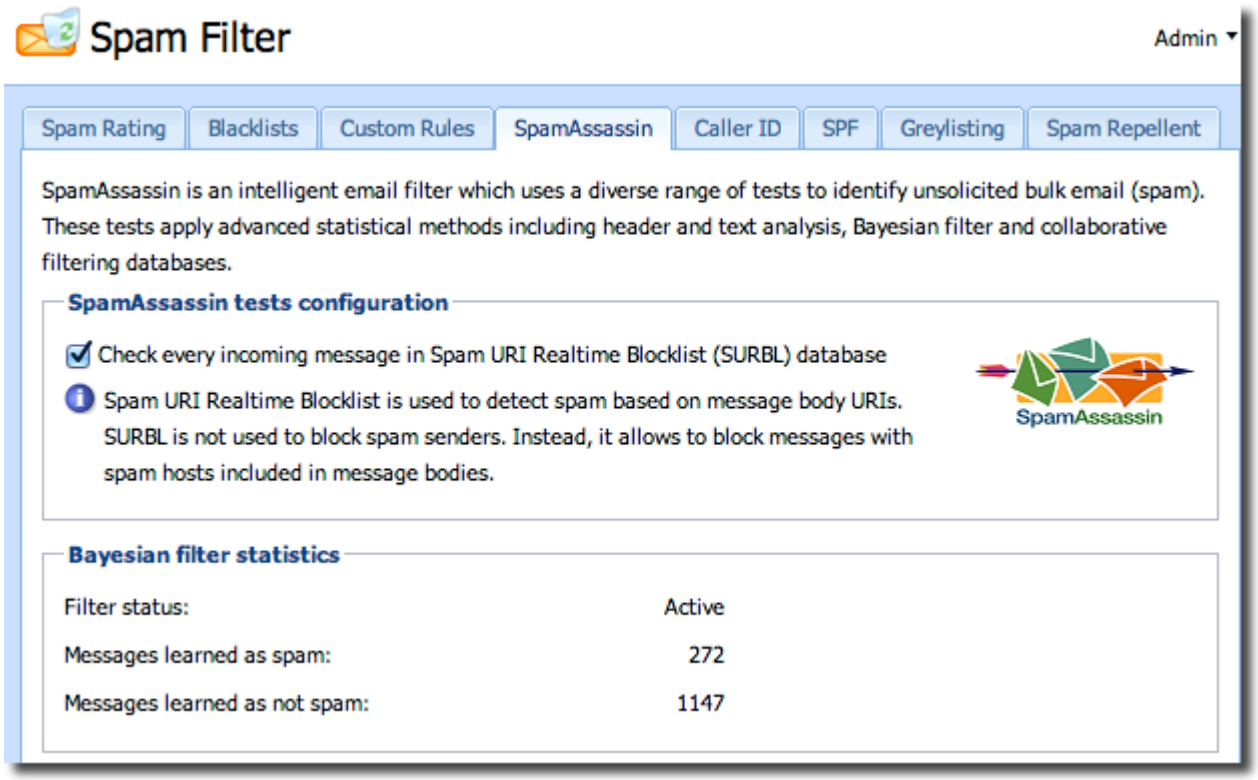
In addition to SpamAssassin, Kerio Connect includes several other spam controls, including blacklists, greylisting, custom rules, and Sender Policy Framework (SPF).

For more information, see Configuring spam control in Kerio Connect.



Archiving email

Archiving can be enabled under **Configuration** → **Archiving and Backup** → **Archiving**.

This allows the administrator to keep a duplicate of every message, so that if a user deletes an email, the copy of the message can be retrieved from the archive.

Privileged users are assigned the right to access the archive, which appears as a separate folder tree in the Kerio Connect client.

To distribute the workload of disk activity, or to preserve space on the mail store volume, you can choose a separate location for storing the archived messages.

See Archiving in Kerio Connect.

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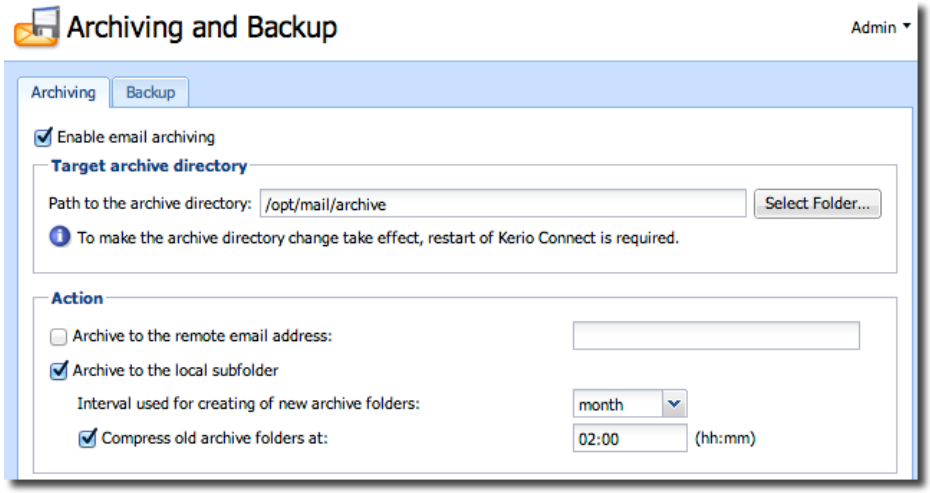

Configuring backups

Server backups can be enabled under **Configuration** → **Archiving and Backup** → **Backup**.

backups allow the administrator to keep a copy of the entire server configuration and user data.

The default backup schedule is nightly, and the server remains accessible during the backup process.

You can assign a separate storage location for backups, including a network volume or externally mounted device.

Recovery from a backup is managed with a command line utility, which allows you to recover anything from the server's configuration and data, such as a user's calendar.

For more information, see Configuring backup in Kerio Connect and Data recovery in Kerio Connect.

Synchronizing data with mobile devices

Users can choose to wirelessly manage their mailboxes using the Exchange ActiveSync protocol, which is supported by nearly all contemporary smartphones.

A slightly less widely adopted option includes a combination of protocols, including IMAP, CardDAV, and CalDAV.

Both synchronization options provide comparable functionality. Users with Apple iOS based devices have the option of a simplified setup, using a profile configuration tool that is accessed from the login page of the Kerio Connect client.

For details, see Synchronizing data with mobile devices.

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Accessing email from desktop applications

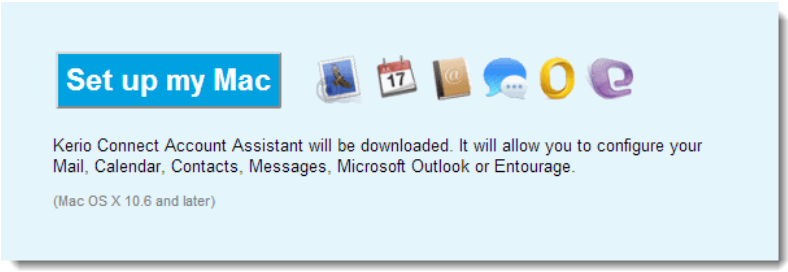
Users can choose to manage their mailbox from any standard desktop email application. However for extended groupware functionality we recommend one of the following:

- Kerio Connect client
- Microsoft Outlook with Kerio Outlook Connector
- Microsoft Outlook for Mac
- Microsoft Entourage
- Apple (Mail, Calendar, Contacts, Reminders)

To simplify the configuration of new accounts on Mac OS X, users can launch the Kerio Connect Account Assistant from the login page of the Kerio Connect client.

For Microsoft Outlook users on Windows , a special plug-in called the Kerio Outlook Connector is available.

For details on its installation and usage, see Installing Kerio Outlook Connector and Synchronizing Microsoft Outlook with Kerio Connect.



Configuring instant messaging

Instant messaging in Kerio Connect is based on the Extensible Messaging and Presence Protocol (XMPP) and enables users to send text messages and files in real time, view online status, and participate in group chats.

Mac OS X users can automatically configure the Apple Messages application using the Kerio Connect Account Assistant.

Windows users use the Pidgin application. See Configuring clients for instant messaging.

To simplify the initial setup of instant messaging programs, we configure a service record (SRV) for our email domain (example.com).

For details on DNS and general server configuration for instant messaging, see Configuring DNS for instant messaging and Configuring instant messaging in Kerio Connect.

Migrating data

In our example we migrate email data and folders from a hosted email service using a wizard-based utility (Kerio IMAP Migration Tool). Data is transferred using IMAP.

A separate utility (Kerio Exchange Migration Tool) is available for migrations from Microsoft Exchange Server.