

K@bi Software

Kubi Client 1.0 for Lotus Notes

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Welcome to Kubi Client

Kubi Client is the first Collaborative Email solution that combines the power of collaboration software with the familiarity and ease-of-use of Email. Kubi Client makes it easy for Email users to spontaneously share documents, discussions, contacts, and tasks in organized team spaces without leaving your Notes Client.

How Do I Get Started?

Kubi Client is simple to download and use and provides all the functionality your team needs to collaborate. It takes only a few steps to get your team up and running:

Create a new Kubi Space.

Send Email invitations to new members.

New team members download Kubi Client and accept your invitation.

Your team starts using your Kubi Space to share documents and ideas.

How Do I Learn More?

Visit the [Kubi Software web site](#) to experience the Kubi interactive tutorial.

Working with Kubi Spaces

Kubi Spaces are where your team shares documents, discussions, contacts, and tasks, all within your familiar Notes Email application. A Kubi Space contains all the participants who'll collaborate on a particular project, as well as all the folders and data they'll share. In addition to the folders Kubi provides, you continue to use your Notes Inbox and Calendar just as you always have.

Creating a Space

When you create a Space, you automatically become the [Space Leader](#).

To create a Space in Notes:

1. Open the **Kubi Home** database.
2. Click **Add/Remove** in the folder list under **Kubi Home**.
3. Type a name for your Space and click **Create the Space**.

Kubi automatically creates a new database containing one folder of each type (Team, Tasks, Documents, Discussion, Contacts, and Trash) for the new Space.

Deleting a Space

When you delete a Space from your computer, you can no longer participate in it. If you want to rejoin the Space, ask the Space Leader to re-invite you.

When you delete a Space, Kubi automatically removes you from the Space's Team folder and marks the Space .NSF file read-only.

To delete a Space:

1. Open the **Kubi Home** database.
2. Click **Add/Remove** in the folder list under **Kubi Home**.
3. Pick the Space you want to delete and click **Remove**.
4. Notes doesn't automatically remove the icons from your Workspace. Delete them manually.

The Kubi Home Page

Kubi Home gives you a quick overview of recent activity in your Spaces . Kubi Home contains links to all the Spaces you participate in, recent activity for all your Spaces, and a link that takes you to a page where you add and remove Spaces. The Recent Activity list shows you what's new in all the Spaces you participate in. When a new participant joins or when a new document, discussion message, task, or contact is added or updated, it automatically appears in the Recent Activity list in Kubi Home. Items stay in the Recent Activity list for seven days. You can view and sort recent activity by date, participant, or Space.

Working with Folders

Kubi organizes your Space into a series of folders, just like the ones your Email system uses to organize related documents. You can manipulate Kubi folders just as you do any other Notes folders - the key difference is that all folders in your Kubi Space are synchronized and can be accessed by all the Space's participants.

Creating Folders

You create Kubi folders the same way you create any other folder in Notes, with the **Create > Folder** command. You can create as many folders as you like and nest them under other folders.

Tips for Naming Folders

If you try to give a folder a name that already exists, Kubi adds a number, starting with 2, to the end of the folder name. For example, Kubi creates the name Sales Reports 2 when a folder named Sales Reports already exists in the Space.

Deleting Folders

To keep your Kubi Space uncluttered, Space Leaders can delete duplicate folders or folders that participants no longer find useful. You can't retrieve deleted folders, so delete folders only when you're sure that your team no longer needs them and you've backed up the data. When you delete a folder in your Kubi Space, any folders it contains are automatically deleted, too. You delete a Kubi folder just as you would any other folder in Notes or Outlook. Kubi moves deleted folders to your Deleted Items folder in Outlook or to your Trash folder in Notes.

The Team folder is protected and can't be deleted. Space Leaders can delete any other type of folder.

Copying Within a Space

You can copy items and folders within your Space the same way you copy any other items and folders in Notes. The participant who copies an item is displayed as the author of the new item, even if they didn't create the original.

You can't copy items to a different type of folder. For example, you can't copy a posting in the Discussion folder to the Contacts folder.

Copying Across Spaces

You can copy items and folders from one Kubi Space to another with some restrictions:

- You can't copy the Team folder to another Space.
- If you move an item or folder to a folder that doesn't belong to Kubi, for example, if you move a document to your personal Inbox, Kubi removes the item or folder from the Space, which means that other participants can no longer access or update it and it is no longer synched by Kubi.
- Before you copy an item to another Space, consider whether you'll give people access to something they weren't intended to see in the first place. For example, suppose you belong to both the Senior Management Space and the Midwest Sales Team Space. Participants in the Senior Management Space most likely share sensitive information, like salary data, that wouldn't be appropriate for all members of the Midwest Sales Team to see.

The details for copying across Spaces are the same as for copying within the same Space.


Working with Participants

Participants are the people who collaborate in a Kubi Space. All participants have one of two roles:

- **Space Leader** When you create a Space, you automatically become the Space Leader. (You can't assign leadership of a Space to someone else.) Space Leaders are the only participants who can invite and remove participants. Space Leaders can also edit and delete any items in their Space.
- **Participant** All participants invited by the Space Leader have the same rights in a Space. All participants can add items to a Space. Only the participant who added an item can edit or delete it.

Viewing a List of Participants

The Team folder shows a list of all the participants in your Space. You can sort the list of participants by name or Email address by clicking the heading of the column to sort by.

 **Note:** Participants who withdraw or are removed from the Space do not appear in the Team folder. Only active participants and invitees (including those who declined the invitation) appear in the list.

Inviting Participants to a Space

If you are the Space Leader, you invite people to participate in a Kubi Space by sending an invitation Email that asks them to:

- Download Kubi Client (if it's not already installed on their computer).
- Join the Space by clicking the Accept button in the invitation.


As soon as you invite someone to a Space, they are added to the Team folder with a status of Invited. Their status changes to Active when they accept the invitation.

To invite someone to a Space:

1. Open the Team folder.
2. Click **Invite New User**.
3. Enter the Email addresses of the people you want to invite. Remember that Kubi is integrated with your Email program, so you can use your Address Book to pick people you want to invite.

When you invite a Notes user to a Space, make sure you send the invitation to the correct address. If the **Internet mail address** (located on the Basics tab in the user's Location document) differs from the mail address that you send the invitation to, Kubi can't initialize the Space on the user's computer because the certificates that Kubi uses for encryption and identity management are associated with the mail address that the invitation is sent to. Kubi notifies you by Email that the addresses didn't match. Re-send the invitation to the correct mail address, which is specified in the notification message Kubi sends back.

4. Click Send Invitation(s).


 **Important:** Don't add images or attachments to Kubi invitations you send out.

Accepting an Invitation to Join a Space

You join a Kubi Space by accepting the invitation Email sent by the Space Leader.

To accept an invitation to a Space:

1. Open the invitation Email.
2. If you haven't already installed Kubi on your computer, click the link to install Kubi and follow the instructions on the download page that appears.
3. Once you've installed Kubi, an Accept button automatically appears in the invitation Email. Click it.

 **Note:** An invitation to a Kubi Space never expires. If you want to join the Space, just not right now, you can leave the invitation Email in your Inbox until you're ready to accept. Keep in mind that if you let too much time pass before accepting, the Space Leader might assume you don't want to join the Space and withdraw your invitation.

Declining an Invitation

If you've been invited to a Space but don't want to join, click the **Decline** button in the invitation Email. Kubi notifies the Space Leader that you declined.

Withdrawing an Invitation

The Space Leader can withdraw any invitation that has not yet been accepted. When you withdraw an invitation, Kubi sends the invitee an Email notification that you've withdrawn the invitation and removes the invitee from the Team folder.

To withdraw an invitation:

1. Open the Team folder.
2. Double-click the participant in the list.
3. Click the **Uninvite** button.

Removing a Participant from a Space

People may leave your team or may simply not want to participate in a Space any longer. Participants can withdraw from a Space themselves or the Space Leader can remove them. Only Space Leaders can remove other participants from a Space.

When you remove a participant from a Space, Kubi automatically:

- Locks the .NSF file for the Space on the participant's computer. The participant can no longer access any data in the Space.
- Removes the participant's name from the Team folder.
- Sends the participant Email notification that they were removed from the Space. No other participants are notified.

To remove a participant from a Space

1. Open the Team folder.
2. Click the participant's name in the list.
3. Click the **Uninvite** button.
4. When Kubi asks if you really want to remove the Space from the participant's computer, click **OK** to remove the participant or **Cancel** to leave them in the Space.

Withdrawing from a Space

If you decide you don't want to participate in a Space anymore you can withdraw from it. When you withdraw from a Space, Kubi automatically:

- Removes your name from the Team folder.
- Removes the Space from your computer by moving the Space to the Kubi Client Deleted Items folder. You can get the deleted data back by moving it from the Deleted Items folder to another folder or Kubi Space, though you're better off doing some planning prior to withdrawing from a Space. Decide if the Space contains any items you'll still need to refer to after you've left the Space and copy them before you withdraw.

! **Important:** If the Space Leader withdraws from a Space, the Space remains active but no other participants can ever be invited to it.

To withdraw from a Space:

1. Open the Team folder from the Space you want to leave.
4. Double-click your name in the list.
5. Click **Withdraw**.
6. When Kubi asks if you really want to withdraw, click **OK** to withdraw from the Space or **Cancel** to remain a participant.

Security in Kubi Client

Information in your Space stays up-to-date and secure. Kubi automatically synchronizes Kubi Spaces, ensuring that all team members have the same information available on their own computers, whether they are Microsoft Outlook or Lotus Notes users. Kubi leverages the existing proven and ubiquitous SMTP messaging delivery infrastructure to deliver data between users. Kubi security uses Public Key Infrastructure (PKI) for every Kubi user and data is encrypted during transmission using standard 168 bit key encryption.

Certificates

Kubi Client uses personal certificates with private keys to verify the identities of Space participants and to encrypt information shared by Space participants. Each participant receives one certificate. Your certificate is automatically created and Emailed to your computer when you install Kubi Client. You don't have to do anything to enable the certificate, but you do need to be connected to the Internet to receive it.

Virus Prevention

Kubi Software takes virus prevention seriously. Kubi Client protects your team by restricting certain types of files: Kubi will not replicate a file or an item with files attached that have Level 1 or "unsafe" file extensions. This includes URLs that link to web sites. Kubi checks for Level 1 file extensions both when you send and receive items.

For more information, see [Microsoft Knowledge Base Article 262631](#). Although this article addresses Outlook security issues, it contains the list of unsafe file types that apply to both the Notes and Outlook versions of Kubi Client.

If Kubi detects restricted documents, it immediately notifies you by displaying a message. Restricted documents appear in the Documents folder on your local computer but Kubi does not replicate them to other participants' computers.

Working with Contacts

Use the Contacts folder in your Kubi Space to share and organize contacts related to your project. When you create a Kubi Space, the contacts folder is empty, but any participant can create new contacts or copy personal contacts to share with the rest of the team. All participants see all contacts created in their Space's Contacts folder. You can't mark a contact you create in a Space as private, so create private contacts only in your own Notes Name and Address Book.

To create a new contact:

1. Open the Contacts folder.
2. Click New Contact.
3. Create contacts in Kubi just as you normally do in Notes. Click Save & Close when you're finished.

Working with Tasks

Use the Tasks folder to create and manage task lists related to your project. All participants see all tasks created in their Space's Tasks folder. You can't mark a task you create in a Space as private, so create private tasks only in your own Notes To Do list.

To create a new task:

1. Open the Tasks folder.
2. Click New To Do Item.
3. Create a task in Kubi just as you normally do in your Notes To Do lists. Click **Save & Close** when you're finished.

Working with Discussions

Use the Discussion folder to post project-related messages to your team. Any participant can respond to your posting.

Your Space can contain as many Discussion folders as your team needs and any participant can [create](#) a new Discussion folder.

To start a discussion:

1. Open the Discussion folder.
2. Click **New Topic**.
3. Enter the information you want to post.
4. Click **Save & Close**.

To respond to a topic:

1. Select the topic.
2. Click **Reply to Topic**.
3. Enter the information you want to post.
4. Click **Post**.

Tips for Entering Information in Discussion Postings

When you create discussion topics and replies:

- Don't paste document links into discussion postings. Other participants can see the links but won't be able to access the documents; instead, they'll see the Notes message, "The database was not found." To share documents with your team, post them to the Documents folder in your Space.
- Don't copy messages from the Inbox view to a Kubi Discussion folder. Instead, create a new discussion posting and copy and paste the text from the mail message to the body of the discussion posting.

Editing and Deleting Discussion Postings

The only people who can edit or delete a discussion posting in a Space are the participant who created the posting and the Space Leader. To delete a topic or a response, select the message and then click the Delete Topic button. When you delete a topic, all its responses are automatically deleted, too. Deleted postings are moved to the Trash folder in Notes.

Copying and Moving Discussion Postings

When you move or copy a main topic to another folder, all its responses are automatically moved or copied, too. In Notes, you can't move or copy responses to a main topic unless you move the main topic, as well.

Working with Documents

Use the Documents folder to post documents you want to share with other team members. Only participants who belong to a Space can see documents posted the Documents folder, so you have control over who sees your team's files.

Share spreadsheets, word-processing documents, and slide presentations - anything your team needs. Remember that participants must have a software program, plug-in, or viewer that lets them view the document you post, so try to use file types that most people can view easily. For instance, suppose you create diagrams and drawings in a program like Microsoft Visio or Adobe Illustrator. Unless you know that the rest of your team also uses the program, don't share documents saved in the program's native format. Instead, save the documents in a format that everyone can view, like .JPG or .PDF, before you post them to your Kubi Space.

To share a document:

1. Open the Documents folder.
2. Click New Document.
3. Click Attach Document.

You'll see the same familiar Notes interface you use to attach a document to an Email message. Pick a document to share and, optionally, pick a category. Click **Save & Close** when you're finished.

Editing and Deleting Documents

The only people who can edit or delete a document that's shared in a Space are the participant who posted it and the Space Leader. You delete a shared document the same way you delete an Email message; simply click the document and press the Delete key. Deleted documents are moved to the Trash folder in Notes.


Guidelines for Document Size

Email servers and providers limit the size of documents that can be attached to an Email message, which limits the size of documents that you can share in your Space. The size limit varies, depending on your Email server and provider, but try to keep document size to under a few megabytes (MB). If a document is too large, it can't be delivered. Kubi doesn't explicitly notify you that the document was not delivered, but instead returns a Non Delivery Report Email to the Systems folder, under Failed System Messages.

Restricted Documents

Kubi Client protects your team by restricting certain types of files. Kubi will not replicate files or items with files attached that have Level 1 or "unsafe" file extensions. This includes URLs to web sites. Kubi checks for Level 1 file extensions both when you send and receive items. For more information, see [Microsoft Knowledge Base Article 262631](#). Although this article addresses Outlook security issues, it contains the list of unsafe file types that apply to both the Notes and Outlook versions of Kubi Client.

If Kubi detects restricted documents, it moves them to a System Messages folder named Quarantined Files and immediately notifies you by displaying a message.

 **Tip:** If you need to share a file of a restricted type and you're sure it's virus-free, save it in a .ZIP file and share that file in the Documents folder.

Troubleshooting

This section contains answers and workarounds for problems you might have while working with Kubi Client. If you have a problem or question, especially if it's related to how Kubi interacts with your system, look here first.

Can I run Kubi Client on two different computers?

Yes, you can run Kubi Client on any number of computers as long as you use the same Email address on all of them.

Exchange and Domino Email Servers: First, install Kubi Client on one computer and accept an invitation to a Space. Then, install Kubi Client on your other computer. All the Spaces you participate in are automatically synchronized on the second computer. When you accept invitations to new Spaces, they are automatically available on both computers, regardless of which one you were using when you accepted the invitation.

POP3 Email Servers: Follow this procedure:

1. Open your Email client (Notes or Outlook) on the original computer where Kubi Client is installed.
2. Click the **About Kubi...** button.
3. Write down the secret key displayed in the About Kubi dialog box.
4. Install Kubi Client on the second computer.
5. When Kubi prompts you, type the secret key and click **OK**.
6. Ask the Space Leader for each Space you participate in to re-invite you to the Space. Accept the new invitations from the second computer.

POP3 servers can't keep track of your Spaces so whenever you join a Space, you'll need to accept the invitation on both computers. If you create a Space, you'll also need to send an invitation to yourself and accept the invitation on the computer you were not working on when you created the Space.

I'm getting a new computer. How do I move Kubi to it?

If you're using the same Email address on the new computer, simply download Kubi Client to the new computer. Once you've downloaded Kubi to the new computer, all the spaces you currently participate in are automatically available.

I have two Windows profiles on my computer and each has a different Email address. Can I use Kubi with both?

Yes, but you need to use a different Inbox for each Email address. You'll also need to have your Space's leader send an invitation to each of your Email addresses. Each instance of Kubi installed on your computer processes only those messages for its associated Email address and certificate ID.

You cannot use Kubi if your inbox is set up to receive messages for more than one Email address at once, for example, if you set up Notes on your work PC to receive messages for both your company Domino account and a personal account that you have through your home broadband service.

Can I switch to another Location or Notes ID?

If you want to change your Location or Notes ID, you must re-install Kubi Client after you make the change. You cannot use Kubi with multiple Notes IDs or mail files.

My company is changing my Email address. Is this a problem?

This shouldn't pose a problem if only the Email alias used inside the company changes.

I've recently noticed a Project Timeline folder in my Space. How did it get there?

Kubi Spaces on Microsoft Outlook can contain Project Timeline folders where participants view and edit key project milestones. If you participate in a Space with Outlook users and one of them invites you to a Timeline Event, Kubi adds a Project Timeline folder to your Space. Timeline Events also appear in your personal Notes Calendar.

How do I stop Kubi Email messages from getting downloaded to my handheld device?

If you use a handheld computer, like a Palm, Blackberry, or Pocket PC, you'll want to create a filter so that Kubi collaborative messages and invitations don't get downloaded to your handheld. The procedure for creating a filter is different for each type of handheld, but all filters should filter out any Email message whose subject line begins with either of the following strings:

- [Kubi Invitation]
- [Kubi]