

K@bi Software

Kubi Client 1.0 for Microsoft Outlook

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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, tasks, and project events in organized team spaces without leaving Email.

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:

1. Create a new Kubi Space.
2. Send Email invitations to new members.
3. New team members download Kubi Client and accept your invitation.
4. 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, tasks, and project events, all within your familiar Outlook 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 Outlook 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:

1. Click the **Create a New Kubi Space** button on the Kubi toolbar.
2. Type a name for your Space, choose the folders you want the Space to contain, and click **OK**.

You can always add more folders later by clicking the **Add** link at the top of the Folders list on your Space's home page.

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.

To delete a Space:

Delete the top-level project folder for the Space. When you delete a Space, Kubi automatically:

- Moves the Space to the Deleted Items folder in Outlook or the Trash folder in Notes.
- Removes you from the Space's Team folder.

Home Pages

Home pages give you a quick overview of your projects, including recent activity and unread items. There are two types of home pages:

- Kubi Home contains links to all the Spaces you participate in, recent activity for all your Spaces, and your Outlook Inbox. (Only you see your Inbox; other participants can't see it.) You can jump to one of your Spaces, create a new Space, or work with your Email from the Kubi Home page. Click the Kubi Home folder or shortcut to display the Kubi Home page.
- A Space's home page contains links to all the folders in the Space and recent activity for the Space. You can create and access items and folders and create new folders from a Space's home page. Click the Space in the My Spaces list on the Kubi Home page to display that Space's home page.

Recent Activity


In addition to providing an overview of your Space's folders, home pages also include Recent Activity lists that show you what's new in the Space, or, if you're on the top-level Kubi Spaces home page, in all the Spaces you participate in. When a new participant joins or when a new document, discussion message, timeline event, task, or contact is added or updated, it automatically appears in the Recent Activity list in your home page. Items stay in the Recent Activity list for seven days. Kubi displays the Recent Activity list in all Spaces; you can't remove it from the home page.

By default, the Recent Activity list is displayed in a flat view, with all entries at the same level.

Click the **Group** link at the top right of the Recent Activity list to display the list in a tree view, with all entries organized by folder and, if applicable, by Space. Click a Space or folder name to expand or contract its recent activity list.

Customizing Home Pages

The Space Leader can customize the Space's home page by choosing which folders are displayed on the page and how these folders are arranged. When the Space Leader customizes the appearance of the project home page, these changes are replicated to all participants.

 **Note:** Only Space Leaders can customize a home page, but any participant can [add a folder](#) to a Space

To customize a Space's home page:

1. Click the name of the Space in the Kubi toolbar to go to the Space's home page.
2. Click **Customize this page...** at the top of the page.
3. Pick the folders to display in your Space.
4. Under **Show folder content in this order**, click the arrows to move folders up or down and right or left on the home page.

Working with Folders

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


Creating Folders

Any participant can create new folders in a Space.

1. Click the name of the Space in the Kubi toolbar to go to the Space's home page.
2. At the top of the Folders list, click **New**.
3. Type a name for the folder and select the type of items the folder will contain.

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.

4. Click **OK**.

 **Tip:** This procedure creates top-level folders in a Space. To turn a folder into a sub-folder, click it in the Outlook Folder List and drag it to another folder.

Deleting Folders


To keep your Kubi Space uncluttered, Space Leaders can delete duplicate folders or folders that participants no longer find useful. 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 Outlook. Kubi moves deleted folders to your Deleted Items folder.

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

Copying and Moving Within a Space

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

You can copy items to and from any type of folder. If you copy an item to a different type of folder, Outlook automatically converts the copied item to the type of item that the destination folder expects. For example, if you copy a message from your Inbox to your Space's Contacts folder, Outlook creates a new Contact form for the message's author.

 **Note:** Nesting in discussion threads might not be preserved if you copy or move them to other folders.

Copying and Moving Across Spaces

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

- You can't move the Team folder to another Space.
- While you can move an entire Space to another folder, Kubi strongly recommends that you don't.
- 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 move or 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 and moving across Spaces are the same as for copying and moving 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, Email address, or participant status 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 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 Participant.
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.
4. Click Send.


 **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 install Kubi and 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 to Join a Space

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 **Withdraw Participant from Project** 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:

- Removes the Space from the participant's computer. The Space is permanently deleted and 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 **Remove Participant** 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.
2. Double-click your name in the list.
3. Click **Withdraw**.
4. 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](#).

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

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 Outlook Contacts folder.

To create a new contact:

1. Open the Contacts folder.
2. Click **New Contact**.
3. Kubi leverages the functionality of Outlook's Contacts folder, so you create contacts in Kubi just as you normally do in Outlook.
4. (Optional) To assign the contact to a category, click the Categorize button in the Kubi toolbar.

Kubi takes advantage of Outlook's category functionality so you can easily find, sort, filter, or group contacts. See your Outlook Help to learn how to work with categories.

To switch to a different view:

1. Open the Contacts folder.
2. Click one of the following standard Outlook views in the **Display** drop-down list.
 - **Address Cards** lists contacts on individual cards with one mailing address and business and home phone numbers.
 - **Phone List** lists contacts in a list with company name, business phone number, business fax number, and home phone number.
 - **Categorized** lists contacts in a list grouped by categories and sorted by the names the contacts are filed under within each category.



Note: You can use the Outlook **View** menu to further customize the view.

Sharing your personal contacts

Copying your personal contacts to your Kubi Space couldn't be easier: In your Outlook Contacts folder, select the contacts you want to share and hold down the **CTRL** key while you drag them to the shared contacts folder in your Kubi Space.

Contacts you copy to a Kubi Space are not connected to the originals you copied them from; editing a copied contact doesn't change the original, just as editing the original doesn't change the copy in your Kubi Space.

Importing and exporting contacts

If you have contacts in a file, like a CSV file, you can import them into your shared Contacts folder, just as you'd import them into your personal Outlook Contacts folder. See your Outlook Help if you need to learn about importing and exporting contacts.

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. Enter the information you want to post.
3. Click **Post**.
4. (Optional) To assign the posting to a category, click the **Categorize** button in the Kubi toolbar.

Kubi takes advantage of Outlook's category functionality so you can easily find, sort, filter, or group contacts. See your Outlook Help to learn how to work with categories.

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**.

To switch to a different view:


1. Open the Discussion folder.
2. Click one of the following views in the **Display** drop-down list.
 - **Threaded** nests topics and responses so you can easily follow the conversation.
 - **Flat** lists topics and responses at the same level.
 - **Grouped** lists topics grouped by subject.
 - **Categorized** lists topics and responses grouped by categories.



Note: You can use the Outlook **View** menu to further customize the view.

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 Deleted Items folder.

 **Tip:** To edit a posting, right click it and then click **Edit** in the menu that appears.

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. When you move or copy a reply to a main topic, all its responses are automatically moved or copied, too.

Posting Email Messages to a Discussion Folder

Kubi lets you save Email messages to Discussion folders so Space participants can easily reference them later on. Click the **New Email** button in the Kubi toolbar. The Outlook Message form that appears includes a **Make Available In** drop-down list below the **Subject** field. This list contains the names of all the Discussion folders in the Spaces you participate in. Pick the folder where you want to share the message and then compose the message as usual. When you click **Send**, Outlook sends the message to the recipients plus the folder you picked.

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 **Add Document**.
3. Select the document to add and then click **Open**.
4. (Optional) To assign the document to a category, click the Categorize button in the Kubi toolbar.

Kubi takes advantage of Outlook's category functionality so you can easily find, sort, filter, or group contacts. See your Outlook Help to learn how to work with categories.

To switch to a different view:

1. Open the Documents folder.
2. Click one of the following views in the **Display** drop-down list.
 - **Flat** lists all documents at the same level.
 - **Grouped** lists documents grouped by subject.
 - **Categorized** lists topics and responses grouped by categories.

 **Note:** You can use the Outlook **View** menu to further customize the view.

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 the document 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 Deleted Items folder.


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](#).

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.

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 Outlook Tasks folder.

To create a new task:

1. Open the Tasks folder.
2. Click **New Task**.
3. Kubi leverages the functionality of Outlook Tasks lists, so you create, assign, and track tasks in Kubi just as you do in Outlook. See your Outlook Help to learn more about tasks.

To switch to a different view:

1. Open the Tasks folder.
2. Click one of the following views in the **Display** drop-down list.
 - **Flat** lists tasks sorted by owner.
 - **Assigned To** lists tasks assigned to participants, sorted by the task owner's name and due date.
 - **Categorized** lists tasks grouped by categories, sorted by due date within each category.

 **Note:** You can use the Outlook **View** menu to further customize the view.

Working with Project Timelines

If you're using Kubi with Microsoft Outlook, your Space can contain a timeline where participants view and edit key project milestones.

All participants see all entries created in the Space's Project Timeline folder. You can't mark an entry you create in a Space as private, so create private entries only in your personal Outlook Journal.

To create a new event in your Project Timeline:

1. Open the Project Timeline folder.
2. Click **New Timeline Event**.
3. Enter information about the project milestone and then click **Save and Close**.

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 Outlook on your work PC to receive messages for both your company Exchange account and a personal account that you have through your home broadband service.

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.

Can I access my Kubi Spaces with Outlook Web Access?

No, not in Kubi Client. You will be able to access your spaces with Outlook Web Access in Kubi Server, because the data is stored on your company's Exchange server.

How do my Outlook rules affect Kubi?

If you created a rule in Outlook that moves all incoming messages larger than a specified size to another folder, Outlook might move Kubi collaboration messages out of your Inbox before Kubi can process them. If Kubi can't process collaboration messages, information in your Spaces won't be up to date. You can either delete the rule or modify it so that any Email message whose subject line begins with either of the following strings remains in your Inbox:

- [Kubi Invitation]
 - [Kubi]
-

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]
-

Kubi messages don't appear in the correct Outlook form anymore

To fix this problem:

1. In Outlook, choose Options from the Tools menu.
2. Click the Other tab.
3. Click Advanced Options, Custom Forms, Manage Forms, Clear Cache.
4. Close all the option windows.
5. You'll need to re-send the message or restart Outlook for this fix to take effect.