

New Installations Only

The following instructions can be used to install, setup, and test the KeyesMail system. Step by step instructions will guide you through the process, without offering a lot of detailed explanations. Further information can be found in the KeyesMail manual, on each of the topics covered.

If you are installing an update to an existing KeyesMail system, please refer to the "Update Instructions". These can be found on our website.

___ Step 01 **Sign on as a Security Officer**

The following installation procedure will require that you have enough authority to be able to create subsystems, communication controllers and devices.

___ Step 02 **Restoring KeyesMail from a CD or Save File onto your iSeries or AS/400**

If you are installing this from our website, then you should have already copied a Save File (KM08SVF) into your QGPL library. If you have not done this, you can find the instructions in a README.TXT file located in the expanded .EXE file that you download.

1. Restore the programs from CD or Save File to the update library.

From a CD:

**Enter: RSTLIB SAVLIB(KM08LIB) DEV(device)
MBROPT(*ALL) RSTLIB(KMLIB)**

device is the name of the CD device. It is usually called OPT01.

From a Save File:

**Enter: RSTLIB SAVLIB(KM08LIB) DEV(*SAVF)
SAVF(QGPL/KM08SVF) MBROPT(*ALL)
RSTLIB(KMLIB)**

2. If the restore was successful, you can delete the Save File from QGPL, as follows:

Enter: DLTF FILE(QGPL/KM08SVF)

___ Step 03 **Install the KeyesMail Data library**

This step will create a library that will contain all your KeyesMail data. Before the KeyesMail Data library can be installed you must change your library list. Your KeyesMail Program library must be the current library. Also, if you have installed KeyesFax on your system, the KeyesFax library (KFLIB) should also be included on your library list. This will allow the two systems to share phonebooks and dictionary files.

In each of the steps below substitute the correct library names.

1. Change your current library to the KeyesMail Program library.
Enter: CHGCURLIB *kmlib*
2. If you have the KeyesFax system, make sure that the KeyesFax library, usually called KFLIB, is in your library list.
Enter: ADDLIBLE *kflib*
3. Update the KeyesMail Data library, we suggested that you call it KMDATA.
Enter: KMINSTALL *kmdata*

___ Step 04 **Enter your KeyesMail License number**

The KeyesMail system will not function unless the system is activated with a license number. The license number is based on your i5, iSeries or AS/400 serial number, the logical partition that you are running in, and the Version number that you have installed.

Your KM License number may have been sent to you in an e-mail message, if not you may call Computer Keyes to get it. Before you call, you will need the serial number of your iSeries, and the logical partition number that you will be running it in. The KMLICENSE command described below will tell you what the serial number and logical partition numbers are.

1. Switch your current library to your KeyesMail Program library, usually called KMLIB.
Enter: CHGCURLIB *kmlib*
2. Start up the program that will record your KM License.
Enter: KMLICENSE
3. Key your KM License number in the field provided, then press Enter.

___ Step 05 **Change your Library List to include the KeyesMail libraries**

Your KeyesMail Program library (KMLIB) and your KeyesMail Data library (KMDATA) must be on your library list in order for you to run the KeyesMail programs. You may permanently add the libraries to the user portion of the system's library list or temporarily add them to your own library list whenever you want to use the system.

Your library list should have the following libraries on the list, in the order specified:

- KMLIB
- KFLIB (*If you have KeyesFax on your system*)
- KMDATA
- PKZIP (*If you want to compress or encrypt attachments*)

To Permanently add the libraries to the library list:

Use these instructions so that each time a user signs onto the iSeries these libraries are automatically on their library list.

1. The User Library List in an iSeries System value.
Enter: WRKSYSVAL QUSRLIBL
2. You will be placed on the *Work with System Values* screen for changing QUSRLIBL.
3. Select option **2** (Change) to access the *Change System Value* screen for changing QUSRLIBL.
4. Add your KeyesMail and KeyesFax libraries to the list, in the order shown above.

To Temporarily add the libraries to your library list:

Use these instructions if you have not added the libraries to your permanent User Library List.

From any command screen;

Enter: ADDLIBLE *kmdata*

Enter: ADDLIBLE *kflib* (If it exists)

Enter: ADDLIBLE *kmlib*

___ Step 06 **Create the KeyesMail Subsystem**

The KeyesMail programs run in its own subsystem, called KMAIL, with its own job queues, job descriptions, message queues, etc. All of the objects needed will be created in the KeyesMail Data library.

1. Be sure that the KeyesMail Program and Data libraries are on your library list. If not, use ADDLIBLE to add the libraries.
2. Create the KeyesMail Subsystem.

Enter: CRTKMLSBS

___ Step 07 **Selecting a Mail Server**

The selection of a mail server is the most important step to a successful installation. You have a number of different options available to you, depending on your existing hardware configuration.

Network Mail Server:

You can connect KeyesMail to any available mail server running on a network that your iSeries or AS/400 is connected to. This would include an Exchange Server, a Notes Server, a Domino Server, or any other mail server running on your network.

Using this type of connection is the best and easiest connection to define and use. You would simply define additional POP3 mailboxes on the network mail server for each of the 5250 terminals on the iSeries that you wish to be able to receive mail. KeyesMail will act like a POP3 mail client to get its mail from the existing mail system. Sending mail from KeyesMail through the existing mail system will not require any additional mailboxes on the network mail system.

iSeries Mail Server:

You can connect KeyesMail to the iSeries mail server, if your iSeries has an Internet connection. The iSeries SMTP and POP3 mail servers can be used to supply KeyesMail with mail for any of your 5250 terminals.

KeyesMail will be able to retrieve the mail from as many of the iSeries mailboxes that you wish to define. Sending mail from KeyesMail will not require any iSeries mailboxes.

Dial up an ISP:

If you do not have access to another mail server and do not have an Internet connection, you can have KeyesMail dial-up an Internet Service Provider and use the ISP's mail server. This is the least expensive approach to providing mail to everyone on your iSeries. KeyesMail can periodically dial up your ISP, retrieve mail for everyone in the company, then distribute that mail to both 5250 terminals and to any PC mail clients that are on the iSeries TCP/IP network.

When selecting an ISP, it is important for you to find one that will offer you the service that you want for the best price. Smaller, local ISP's are usually the best ones to try first. Most companies have been able to meet all their mail needs for under \$50/month.

The first step is to register a domain name for your company, then ask if your ISP can create a single mailbox that will service everyone in your company (domain). They need to be able to route all e-mail addresses (regardless of what is to the left of the @ character) into a single POP3 mail account. This will keep the cost down.

KeyesMail will retrieve all the mail, from that single POP3 domain mail account, and route each message to the individual mailboxes that you define on the iSeries.

Setting up your Connection

If you will be using a dial-up connection, you will need to refer to the KeyesMail User's Guide for instructions on how to do this. The following instructions can be used if you have a network connection to a mail server or to the Internet.

The KeyesMail System Setup screens allow you to define how often the system will do mail runs. For each mail run the system will send all the mail that has a status of "Out Box", and retrieves any mail available from the mail server in the defined mail accounts.

There are two different places in KeyesMail that you can define a mail account. A domain mail account is a mail account that contains all the mail for your entire company (domain). This is defined in the KeyesMail System Setup screen, as shown in this section. Individual or personal mail accounts are defined on the User Setup screens, as shown in the next section.

Step 08 Define a KeyesMail Connection

Mail is sent out using an SMTP mail server. Inbound mail is retrieved from a POP3 mail server.

1. Be sure that the KeyesMail Program and Data libraries are on your library list, as described on a previous page.

2. Display the KeyesMail Menu.

Enter: GO KMMENU

3. Start item **21** *Work with KeyesMail Connections*.

Work with KeyesMail Connections
KMLOutQ Process:

Type option, press Enter.
1=Start 2=Change 3=Copy 4=End(Normal) 7=Cancel(Immed) 8=Remove

Cntn	Current/Previous activity
Opt # STS	
—	Use F6 to add a new connection

F3=Exit	F5=Refresh	F6=Add new Call	F9/F10 Start/End KMLOutQ
F12=Cancel	F13=KMail Jobs	F14=MsgQ	F15=JobQ
F20=Work w/Hdwr	F21=Work w/TCP	F22=Work w/Cntn Scripts	

4. Use option **3** to copy an existing connection to the new number. If no connections exist use **F6** to create a new one.
5. Use option **2** to define the new connection information. The **Help** key may be used to get additional information about each parameter.

Sample Network Connection

You can define a KeyesMail connection directly to your own iSeries, if you have activated the IBM SMTP and POP3 mail servers. More commonly, you can define a connection to a network mail server, if your iSeries is connected to the network.

KeyesMail System Setup	
Type choices, press Enter.	
KeyesMail connection number >	<u>1</u> 1, 2, 3, 4, 5, 6, 7, 8
Text description 'use quotes' >	'Network connection'_____
Organization/'Company name' >	'Company Name'_____
Connection type >	<u>1</u> (Dialup/Intranet/Continuous)
Time zone >	*SYS (hrs from Universal time)
Domain name 'use quotes' >	'company.com' (key in quotes)
SMTP Server 'Name' or Address >	'smtp.iprovider.net' (Outbound mail)
POP3 Server 'Name' or Address >	'pop3.iprovider.net' (Inbound mail)
SMTP Authentication:	
User/Account 'use quotes' >	*NONE_____
Password 'use quotes' >	*SAME_____
Domain mail account #1:	
User/Account 'use quotes' >	*NONE_____ (individual accts)
Password 'use quotes' >	*SAME_____ (are coded in User Setup)
Domain mail account #2:	
User/Account 'use quotes' >	*NONE_____
Password 'use quotes' >	*SAME_____
Check mail start time >	<u>0800</u>
Check mail end time >	<u>1700</u>
Time between checks >	<u>010</u> (minutes 5-240)
Off hours time between checks >	<u>2</u> (hours 0=no check)
Redial attempts >	<u>0</u>
Connection timeout >	<u>01</u> (minutes)
Communication timeout >	<u>045</u> (seconds)
Max mail size auto retrieved >	<u>15000</u> (Kbytes)
Max mail size manual retrieved >	<u>25000</u> (Kbytes)
Lowest priority starts send >	<u>N</u> (L,N,H ''=none)
System Phonebook >	<u>PHONEBOOK</u>
Phonebook Name Heading >	<u>CONTACT</u>
Phonebook Company Heading >	<u>COMPANY</u>
Phonebook E-mail Heading >	<u>E-MAIL</u>
SMTP Port (usually 00025) >	<u>00025</u>
POP3 Port (usually 00110) >	<u>00110</u>
Default System Language >	<u>AMERICAN</u>
(Also available: British, Danish, French, German, Italian, or Spanish)	
Expire rejected passwords >	<u>Y</u> (Y,N)
Default paper size >	<u>S</u> (S)tandard, (L)egal, (A)4
Disable PING connection test >	<u>N</u> (Y,N)
Text or Image based PDF's >	<u>I</u> (T,I)
Encode PDF text streams >	<u>Y</u> (Y,N)
Batch Conversion Run Priority >	<u>50</u> 20-99, Default 50

Step 09 Creating a KeyesMail Mailbox

In order to test the system you will need to create at least one mailbox. These instructions will create a mailbox for you. This mailbox can be set up to be used for both sending and receiving mail.

The first mailbox, that you create, should be called POSTMASTER. This mailbox will be used as a "catch-all" default mailbox. It will be used for any user that does not have their own KeyesMail mailbox.

1. Start item **31 User Setup** from the KeyesMail menu.
2. Add the mailbox called POSTMASTER, by entering this on the top line.

Work with KeyesMail Users				
Options:	2=Setup	3=Copy	4=Delete	5=Authorization List
				Position to: _____
Option	Mailbox	Name		
	<u>POSTMASTER</u>	Enter new Mailbox here to add		
-				
-				
-				
-				
-				
-				
-				
		Bottom		
F3=Exit	F10=Routing Entries	F12=Cancel	F15=Browse User Profiles	
F17=Top	F18=Bottom			

3. Enter the appropriate information as shown on the following screens to set the mailbox up for the first mail run test.

Step 10 User Setup Screen

Each time you add a new mailbox, the system will preset some of the fields to default values.

1. You should not have to change any of the information this is preset for this mailbox, except for the *Name* and the *Return address* fields.

WRKKMU	User Setup	Date
user-id	Mailbox: POSTMASTER	
Time		
<i>Type choices, press Enter.</i>		
Name	Company Name _____	
Department	_____	
Return address	mail-id@domain.network _____	
Restrict to Local Network	<u>N</u> Yes, No	
Restrict Attachments	<u>P</u> Yes, No, Partial	
Mail Notification		
Delivery mode	<u>N</u> (N)=Normal, (B)=Break, ()=none	
Return read receipts	<u>_</u> (N)=Never, (A)=Always, ()=Ask first	
Send failed e-mail msgs	<u>N</u> (Y)=Yes, (N)=No	
Personal Language	_____ Leave blank to use	
Personal Phonebook	_____ the default system	
Name heading	<u>CONTACT</u> values -----	
Company heading	<u>COMPANY</u>	
E-mail heading	<u>E-MAIL</u>	
Routing entries: MAIL-ID		
F3=Exit F12=Cancel		More...

WRKKMU	Personal Setup	Date
user-id	Mailbox: POSTMASTER	
Time		
Personal Mail Account		
Acct User-Id	_____	
Acct Password	<u>*None</u>	
Connection Number	<u>_</u> 1, 2, 3, 4, 5, 6, 7, 8	
Remove from Server	<u>_</u> Days (' '=Today, N=Never)	
Auto Forward	<u>_</u> Yes, No	
Forward to Address	_____	
Auto Reply member	_____	
Mail purge delay	<u>07</u> Days	
Max Sign-on attempts	<u>5</u> 0-99 (0=None allowed)	
Spam Filter On	<u>N</u> Yes, No	
Signature text:		

F3=Exit F12=Cancel		Bottom

Sending a Test Message

We are now ready to create and send a message. This step will have you create a piece of mail and send it to an address outside your iSeries. For the best and fastest results, try to select an address that you will have ready access to, so that you can see the results.

___ Step 11 **Creating an E-mail Message**

1. Choose item **1** from the KeyesMail menu and press **Enter**.

This will start the *Work with KeyesMail* program where you can control all of your e-mail messages. If this is your first time, it will probably be empty.

```
WRKKML                      Work with KeyesMail                      Date
user-id                                                              Time
By: Date                    Mailbox> POSTMASTER                Position to: _____

Options: 2=Change  3=Copy  4=Delete  5=Open  6=Print  7=Rename  8=Move
          9=Reduce  H=Hold  S=Spam

Category> In Box
Opt  Subject                    To/From                    Status  Size  PSAN  Date
_   KeyesMail brochure  Fr Kristine Kujala <sale *New  21  Y   060715

Bottom
F3=Exit    F5=Refresh    F6=Create new mail    F10=Expand    F11=View 2
F12=Cancel F17=Top      F18=Bottom

Move the cursor to a column and press Enter to change the sort.
```

2. Press F6 to create a new mail message.

The system will create a unique member name in your mailbox, then it will open the new member with the *Message Editor* program.

Step 12 Addressing your E-mail

1. For new mail members, the system will automatically open the *Recipient Addresses* window for you.

Recipient Addresses

To "Person's Name" <test-address@host.network> _____
CC _____
BC _____

Bottom

F3=Exit F12=Cancel F16=Add/Remove @ (no send) character
F17=Mailboxes F18=AddrList F20=Phonebook
Clear or move CC (Carbon Copy) and BC (Blind Copy), as desired.

2. Enter the selected test address on the *To* row and press **Enter**.
3. Press the **Enter** key again and the *Recipient Addresses* window will close.

Step 13 Keying the Message

Create a simple test message, as shown below:

```
EDTKML      Mailbox: POSTMASTER  Member: M071515432      Outbound

  Sent:
  To>      Person's Name <test-address@host.network
  Subject:  Test E-mail message
  Attach>
  Options>  Normal, From: "Company Name" <account-id@host.network>
  Status:   Created                      Category: In Box
  Errors:
  Message:
* . . . 1 . . . 2 . . . 3 . . . 4 . . . 5 . . . 6 . . . 7 . . .
  Person's name,

  This is a test message. Please reply to this message so that I know that
  you have received it.

  Your name

F1=Functions>      Full-Roll  Insert  Bottom
F3=Exit  F4=Adjust  F6=Insert/OvrTyp  F10=Top  F11=Bottom  F24=More Keys
```

Step 14 Sending the Mail to "Out Box"

After creating your test e-mail message, it is time to mail it.

1. Press the **F2** (Send) key.
The message line at the bottom of the screen will give you the following instructions:
Send? Press Enter to mail this message, or F12=Cancel
2. Press **Enter** to send the mail.
The *Message Editor* will check the recipient addresses, using the routing tables, to see if any of the addresses are actually internal mailboxes defined in the KeyesMail system. All internal recipients will be sent the message immediately.
If there are any external addresses, the message will be prepared for transport over the Internet and its Status will be changed to "Out Box". Messages with a status of "Out Box" will be sent through the Internet, to its destination, on the next mail run.
3. Press **F3** (Exit) and you will be returned to the KeyesMail Menu.

The Final Test

If all the previous steps have been completed, you are now ready to actually send and optionally receive your mail.

Step 15 Doing a Mail Run

Starting the KeyesMail connection will activate the entire system and start doing mail runs at the prescribed intervals.

1. Start item **21** *Work with KeyesMail Connections* from the KeyesMail menu.
2. Use option **1** to start the connection.
3. You can watch how the systems connects to the mail server then sends and receives mail, using **F5** (Refresh) periodically.

If the mail run is successful:

- Any mail that has a status of "Out Box" will be sent.
- Any mail in the POP3 mailboxes that you defined will be received.
- The final message will read "Completed run at ...".

Diagnosing a failed run:

If the mail run was not successful, the final message will read "Failed run at ...". You can find out what went wrong by reading the KeyesMail Messages (Option 5 from the KeyesMail menu).

The failure messages will start with KMSMTP (...) or KMPOP3 (...) failed, then it will give you the reason. Each cause of the failure will be listed in a separate message. Read each message that the failed mail run produced until you find and correct the causes.

Note: The most common reason for a failed outbound mail run is a server that has not been configured to relay mail for the iSeries. If this is the case you can look in item 12 *View Failed Mail History* to see the reason for each recipient that fails.

The most common reason for a failed inbound mail run is an incorrect password for one of the mailboxes. If this is the case you will see the message: *KMPOP3 (PASS) failed for (User-Id) reason ...*. This message points out which mailbox has the incorrect password. Remember, the password is case sensitive and must exactly match what the mail server expects.

End of testing:

This concludes the installation, setup, and testing. If you have not been able to complete these instructions, please contact Computer Keyes for assistance. We would be happy to help you.

The KeyesMail User's Guide contains more detailed information so that you can set up additional mailboxes or connections as you need them. You may also want to set up and start some of the KeyesMail Servers. These would allow PC mail clients to retrieve mail from the iSeries.