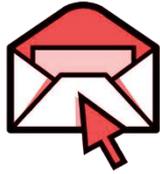


**Zimbra User Training
for
Thomas Jefferson
National Accelerator
Facility**

Agenda



Zimbra Overview and Mail



Address Books



Calendars



Briefcase

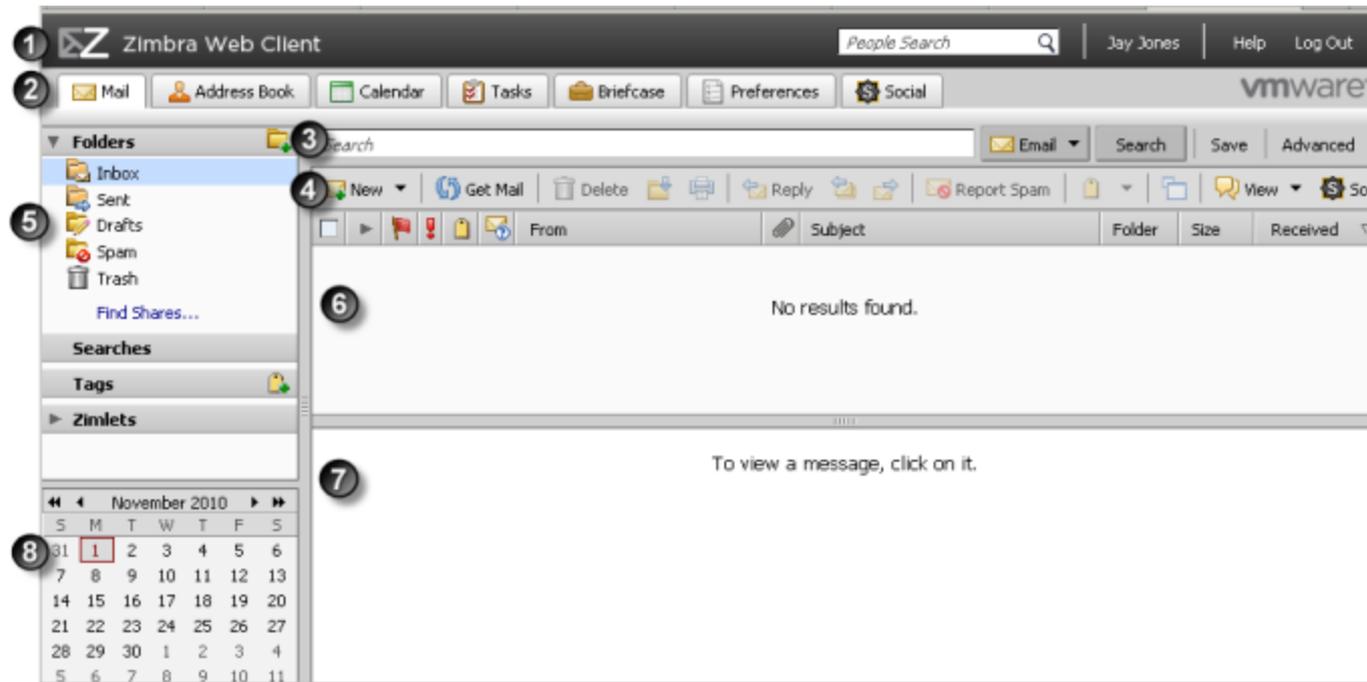


Preferences

Concepts & Terminology

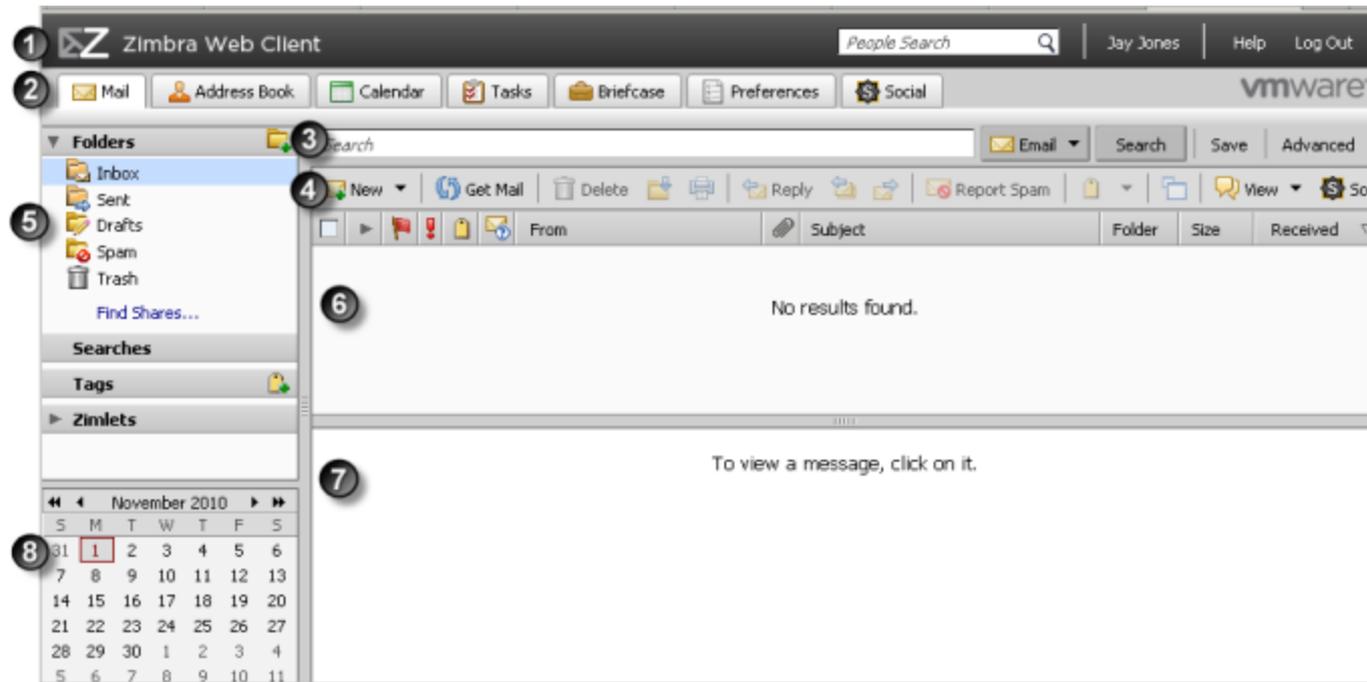
- Zimbra Web Client (ZWC)
<https://zimbra.jlab.org>
- Zimbra Desktop Client (ZDC)
- Unified Inbox
- Global Address List (GAL)

Navigating the Zimbra Web Client



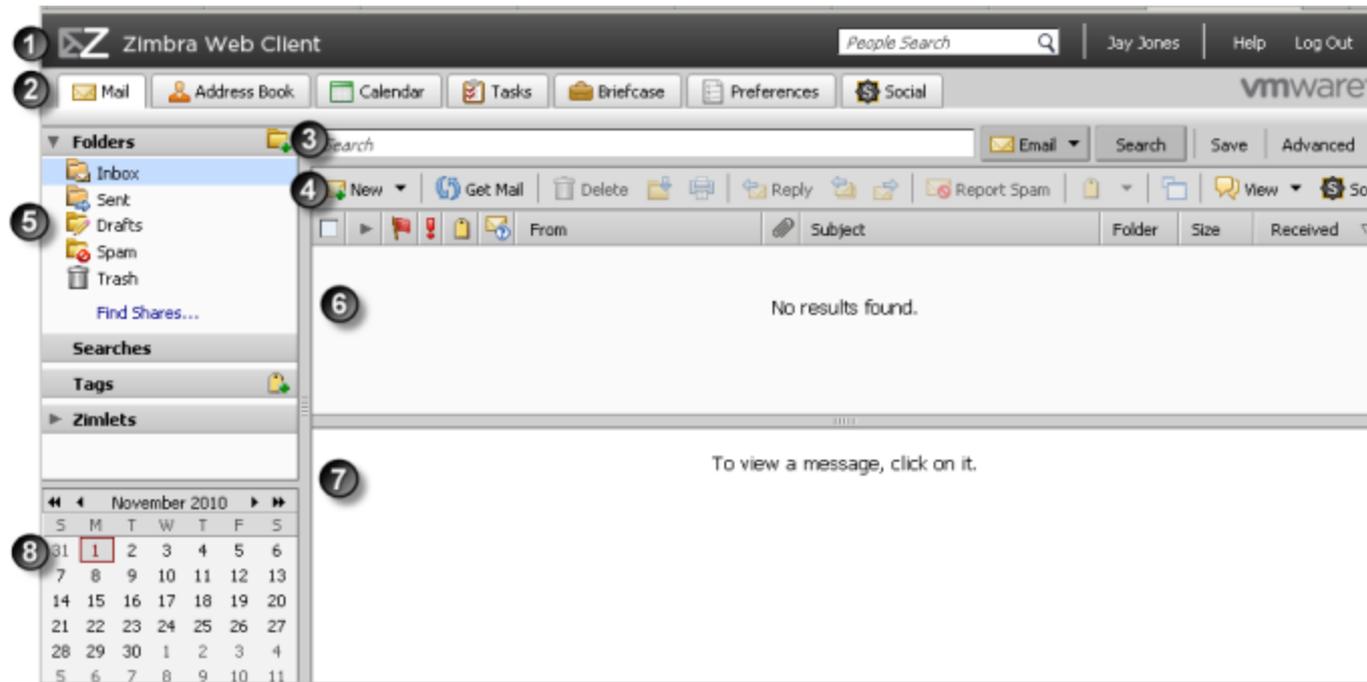
- 1. Header.** This area includes People Search to search your company directory, your name, the Help and Log Out links.
- 2. Application Tabs.** The applications that you can access are listed in the tabs on this row.

Navigating the Zimbra Web Client



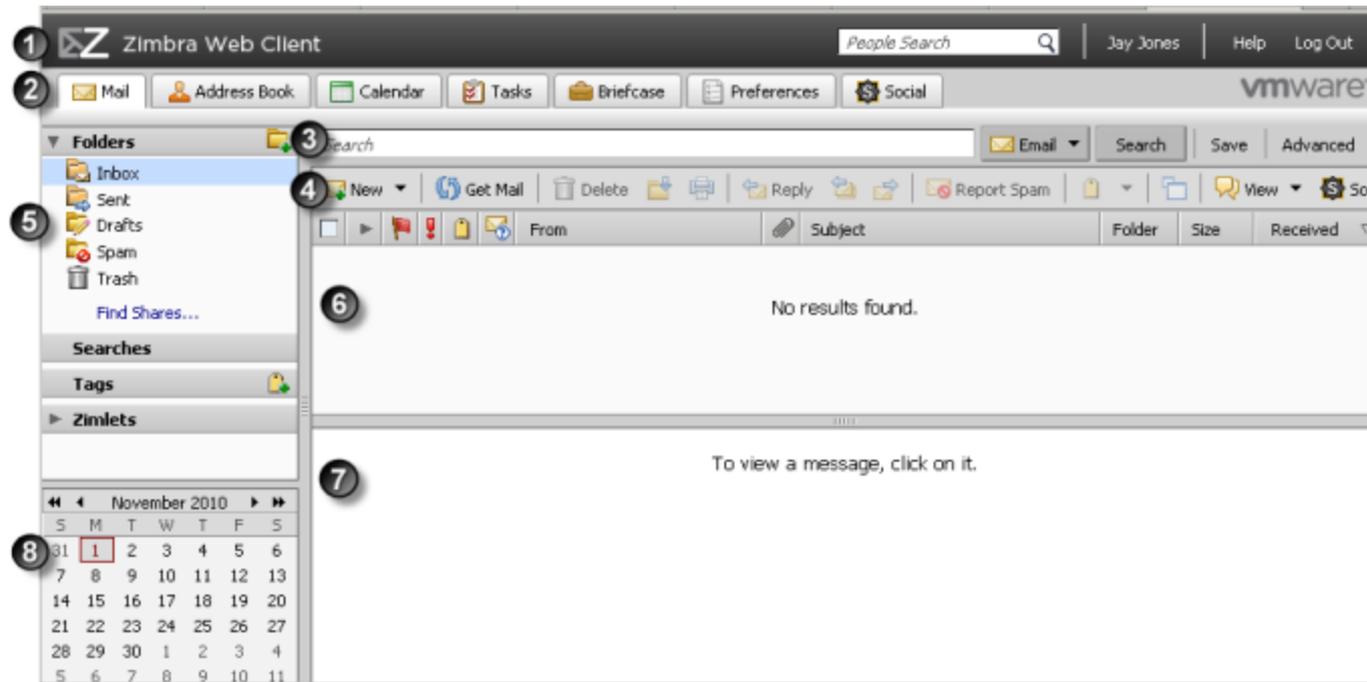
- 3. Search Bar.** Search & Advanced search are displayed in this area. You can also save searches from here.
- 4. Toolbar.** Shows actions available for the application you are currently using. In this example, the Mail application toolbar is displayed.

Navigating the Zimbra Web Client



5. Overview Pane. Displays your Folders, Saved Searches, Tags, Zimlets, and more. The contents of the overview pane change with each application.

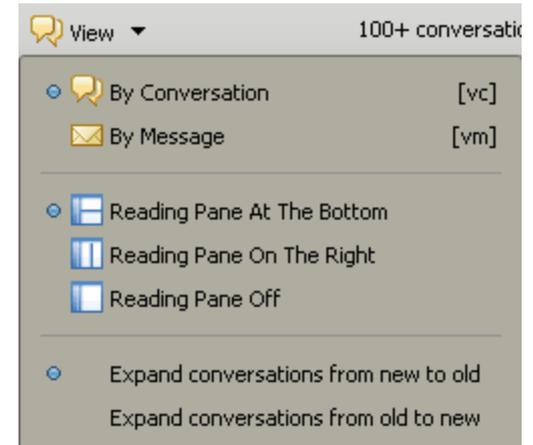
Navigating the Zimbra Web Client



- 6. Content Pane.** The content of this area changes depending on what application is in use.
- 7. Reading Pane.** The Reading Pane is used to preview messages.
- 8. Mini-Calendar**

Viewing Your Email

- You can view your email messages independently or as conversations
- The Reading Pane can be displayed at the bottom, displayed on the right, or turned off.



Composing Email

The screenshot displays the SpecialAI webmail interface. At the top left is the logo "specialai Special Applied Intelligence". A search bar contains "People Search". The user name "Homer Simpson" and "Log Out" link are on the top right. A navigation bar includes "Mail", "Address Book", "Calendar", "Tasks", "Briefcase", and "Preferences".

The left sidebar contains sections for "Folders" (Inbox, Chats, Sent, Drafts, Junk, Trash), "Searches", "Tags", and "Zimlets". Below this is a calendar for August 2012, with the 20th highlighted. At the bottom left is a "Buddy List".

The main content area shows a search bar and a toolbar with "New", "Get Mail", "Delete", "Translate", "Reply", "Spam", and "View" buttons. A dropdown menu is open over the "New" button, listing options: Message [nm], Contact [nc], Contact Group, Appointment [na], Task [nk], Chat [nh], Document [nd], Folder [nf], Tag [nt], Address Book, Calendar [nl], Task Folder, and Briefcase. The main area displays "No results found." and "To view a message, click on it."

Address Book



Address Book is where you can store contact details. By default a **Contacts** and an **Emailed Contacts** address book are created in Address Book. You can create additional address books and share them with others.

- Create multiple address books
- Add contacts to any of your address books
- Share contact lists
- Apply tags to contacts
- Import/Export address books

Address Books

- Your personal address books
 - Contacts (sync'd to your phone)
 - Emailed Contacts
- Global Address List (GAL)
 - Controlled by your Administrator

Creating Contacts

The screenshot displays the SpecialAI software interface for creating a contact. The top bar includes the SpecialAI logo, a search bar, and buttons for 'Contacts', 'Search', 'Save', and 'Advanced'. The user profile 'Homer Simpson' is visible in the top left. The main menu includes 'Mail', 'Address Book', 'Calendar', 'Tasks', 'IM [Beta]', 'Documents', and 'Briefcase'. The 'Address Book' menu is open, showing options like 'New Address Book', 'Contacts', 'Emailed Contacts', 'Trash', 'Buddy List', and 'Tags'. The contact form is titled 'LastName, FirstName' and has tabs for 'Personal', 'Work', 'Home', 'Other', and 'Notes'. The form fields include: Last, First, Middle, Job Title, Company, Address Book (set to 'Contacts'), and File As (set to 'Last, First'). Below this is the 'Email and Instant Messaging' section with three rows of 'Email' and 'IM Address' fields. At the bottom is the 'Add Photo' section with an 'Add New Photo' button. A calendar for June 2009 is visible in the bottom left corner.

SpecialAI
Special Applied Intelligence

Homer Simpson

Contacts

Mail Address Book Calendar Tasks IM [Beta] Documents Briefcase

Save Cancel Delete

LastName, FirstName

Personal Work Home Other Notes

Last: Job Title:

First: Company:

Middle: Address Book:

File As:

Email and Instant Messaging

Email: IM Address:

Email 2: IM Address 2:

Email 3: IM Address 3:

Add Photo

June 2009

S	M	T	W	T	F	S
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Viewing Contacts

The screenshot displays the SpecialAI web interface. At the top, the logo "SpecialAI Special Applied Intelligence" is on the left, and a "People Search" box is in the center. The user name "Homer Simpson" is on the right, along with "Help" and "Log Out" links. Below this is a navigation bar with buttons for Mail, Address Book, Calendar, Tasks, Briefcase, and Preferences. The main interface is divided into several sections:

- Address Books:** A sidebar on the left with a tree view containing "Contacts", "Emailed Contacts", and "Trash". Below this are sections for "Searches", "Tags", and "Zimlets".
- Calendar:** A small calendar at the bottom left shows the month of August 2012, with the 20th highlighted.
- Contacts View:** The main area shows a search bar and a toolbar with "New", "Edit", "Delete", "Print", and "Forward" options. A dropdown menu is open, listing actions like "Message", "Contact", "Contact Group", "Appointment", "Task", "Chat", "Document", "Folder", "Tag", "Address Book", "Calendar", "Task Folder", and "Briefcase".
- Contact Details:** The contact "Ned Flanders" is displayed with a profile picture, name, and location "Contacts". Below this, the email address "savior@simpsonsdidit.com" is shown.

At the bottom right, there is a "Buddy List" icon and the text "[IM beta]".

Company Address Book

Within your organization, you may not always know the correct mail address to use. For example Joe Smith at Acme could variously be **joe@jlab.gov**, or **jsmith@jlab.gov**, or even **js123@erl.jlab.gov**

- Open a new message by clicking from the menu.
- Click **To:**. An address selection dialog appears.
- From the **Show names from** list on the right, select either **Contacts, Personal and Shared Contacts** or **Global Address List** to search.
- Enter a name or portion of a name in the Search box on the left, and then click **Search**. A list of names and email addresses appears on the left.
- Double-click a name to add it to the recipients list on the right.

Calendar

The Zimbra Calendar lets you track and schedule and share your appointments, meetings and events

- Create and manage multiple calendars
- Create appointments, meetings, and events
- Delegate permission to view or manage your calendars
- See attendee's free/busy schedules, show our free/busy schedule

Calendar: Create A New Event

To create a new Calendar appointment click New. This will open a new event for you to populate and review resource availability.

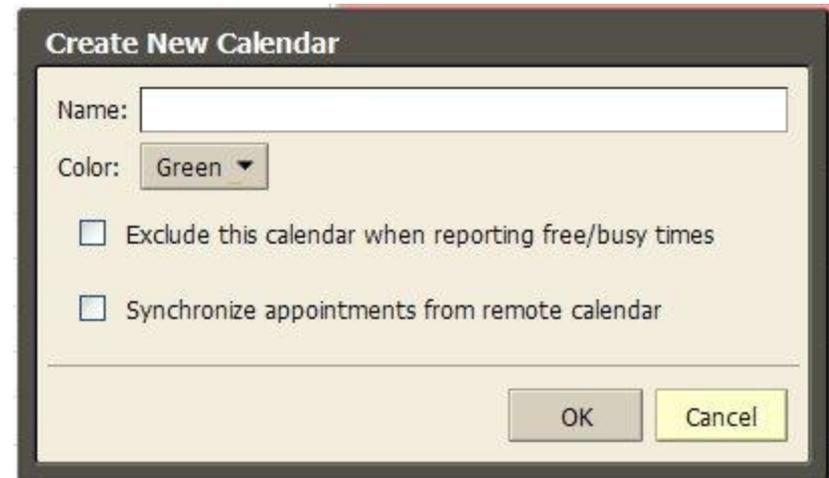
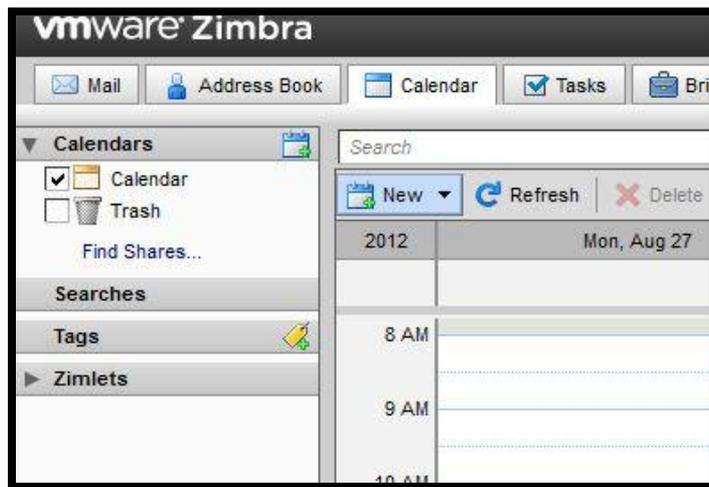
The screenshot displays the VMware Zimbra web interface for creating a new calendar event. The main window title is "vmware Zimbra" and the user is logged in as "Birch Shambaugh". The navigation bar includes "Mail", "Address Book", "Calendar", "Tasks", "Briefcase", "Preferences", and "picnic lunch". The event form is titled "picnic lunch" and includes the following fields:

- Subject:** picnic lunch
- Attendees:** Paul Letta, Kelvin Edwards
- Location:** TestLab 204
- Start:** 8/30/2012, Noon
- End:** 8/30/2012, 12:45 PM
- Repeat:** None
- Reminder:** 5 minutes before
- Display:** Busy, Calendar, Private

The "Scheduler" section shows a grid for resource availability from August 12 to August 12. The grid includes columns for days and rows for attendees: bks@z.jlab.org, letta@z.jlab.org, kelvin@z.jlab.org, and tt204@z.jlab.org. The event is shown as a blue bar from 8 AM to 12:45 PM on August 30. A legend at the bottom indicates status colors: Free (white), Non-working (light gray), Busy (blue), Tentative (light blue), Unknown (yellow), and Out of Office (purple).

Creating Calendars

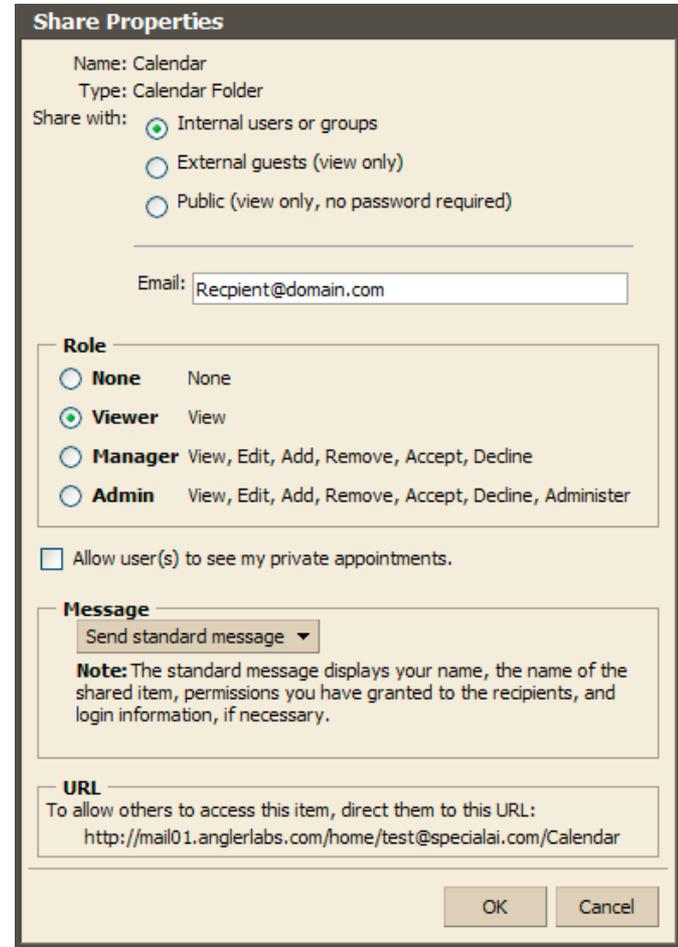
- Select the Calendar tab.
- In the Calendar Overview pane click  or on the toolbar  click the arrow and select **Calendar**.



Calendar: Sharing

To share your Calendar:

1. Right-click on the calendar to share and select Share Calendar.
2. On the Share Properties dialog select whom to share with



Share Properties

Name: Calendar
Type: Calendar Folder

Share with:

- Internal users or groups
- External guests (view only)
- Public (view only, no password required)

Email:

Role

- None** None
- Viewer** View
- Manager** View, Edit, Add, Remove, Accept, Decline
- Admin** View, Edit, Add, Remove, Accept, Decline, Administer

Allow user(s) to see my private appointments.

Message

▼

Note: The standard message displays your name, the name of the shared item, permissions you have granted to the recipients, and login information, if necessary.

URL

To allow others to access this item, direct them to this URL:
<http://mail01.anglerlabs.com/home/test@specialai.com/Calendar>

Importing your iCal calendar

You can import your iCal calendar to an existing calendar ,or create a new calendar and import the .ics file to it.

- Go to **Preferences>Import/Export**.
- In the **Import** section **File** field, browse to locate the calendar .ics file to import.
- Select the destination for this file. Select an existing calendar or create a calendar to import the file. Click **OK**.
- Click **Import**.
- Click **OK**.

Briefcase



Securely upload, share and manage important files from any computer.

- upload documents, spreadsheets, presentations, images, pdf files from your computer or network
- save attachments received/sent to a Briefcase folder
- create different briefcase folders to organize files
- share the briefcase folder with others

Creating Briefcase folders

- Click the Briefcase tab.
- Select Briefcase from the New list on the toolbar.
- The Create New Briefcase dialog displays. Type a **unique** name for the new Briefcase folder.
- Select the folder hierarchy. You can create a new top-level briefcase, or you can place it under an existing briefcase.
- Click OK. The new briefcase displays in the Overview pane.

Sharing in Zimbra

WHAT CAN I SHARE?



Mail



Calendars



Address Books



Documents



Briefcase

Preferences

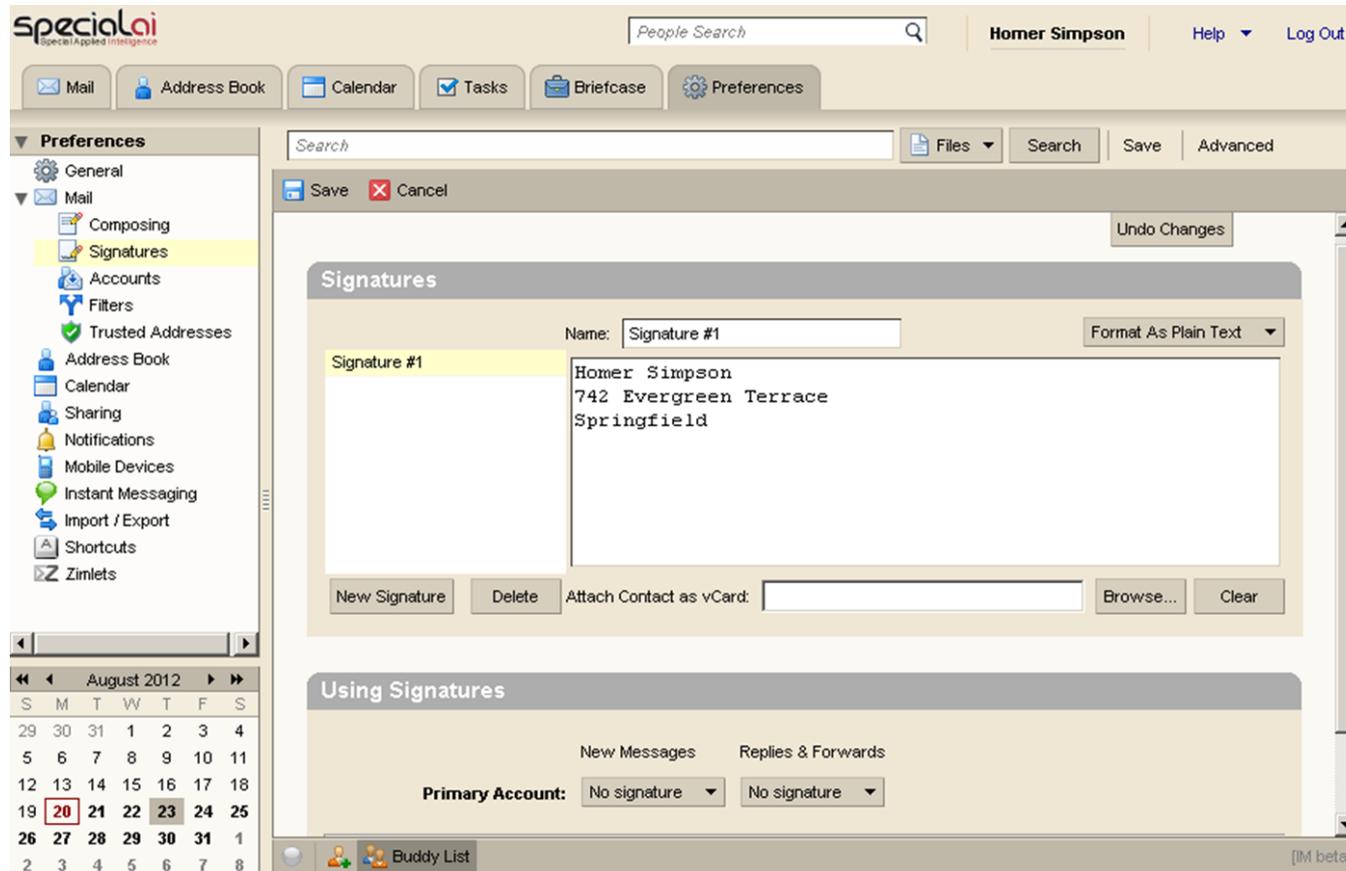


The preferences section allows you to set and configure many different aspects of your Zimbra web client to optimize your experience.

- General
- Mail
- Composing
- Signatures
- Address Book
- Accounts
- Mail Filters
- Sharing
- Notifications
- Mobile Devices
- Shortcuts
- Zimlets

Preferences: Signatures

Preferences tab from the Primary application
menu > signatures sub-tab



Preferences: Auto-reply

The screenshot shows the SpecialAI web interface. At the top, there is a search bar with the text "People Search" and a magnifying glass icon. To the right of the search bar, the user's name "Homer Simpson" is displayed, along with "Help" and "Log Out" links. Below the search bar, there is a navigation bar with icons for "Mail", "Address Book", "Calendar", "Tasks", "Briefcase", and "Preferences". The "Preferences" icon is highlighted.

The main content area is titled "Preferences" and has a search bar. Below the search bar, there are buttons for "Files", "Search", "Save", and "Advanced". The "Mail" category is selected in the left sidebar. The "Auto-reply" section is expanded, showing the following options:

- When a message arrives:**
 - Play a sound (requires QuickTime or Windows Media plugin)
 - Highlight the Mail tab
 - Flash the browser title
 - Show a popup notification (requires Yahoo! BrowserPlus)
- Forward a copy to:**
 -
 - Don't keep a local copy of messages
- Send a notification message to:**
 -
- Send auto-reply message:**
 -
- Start On:**

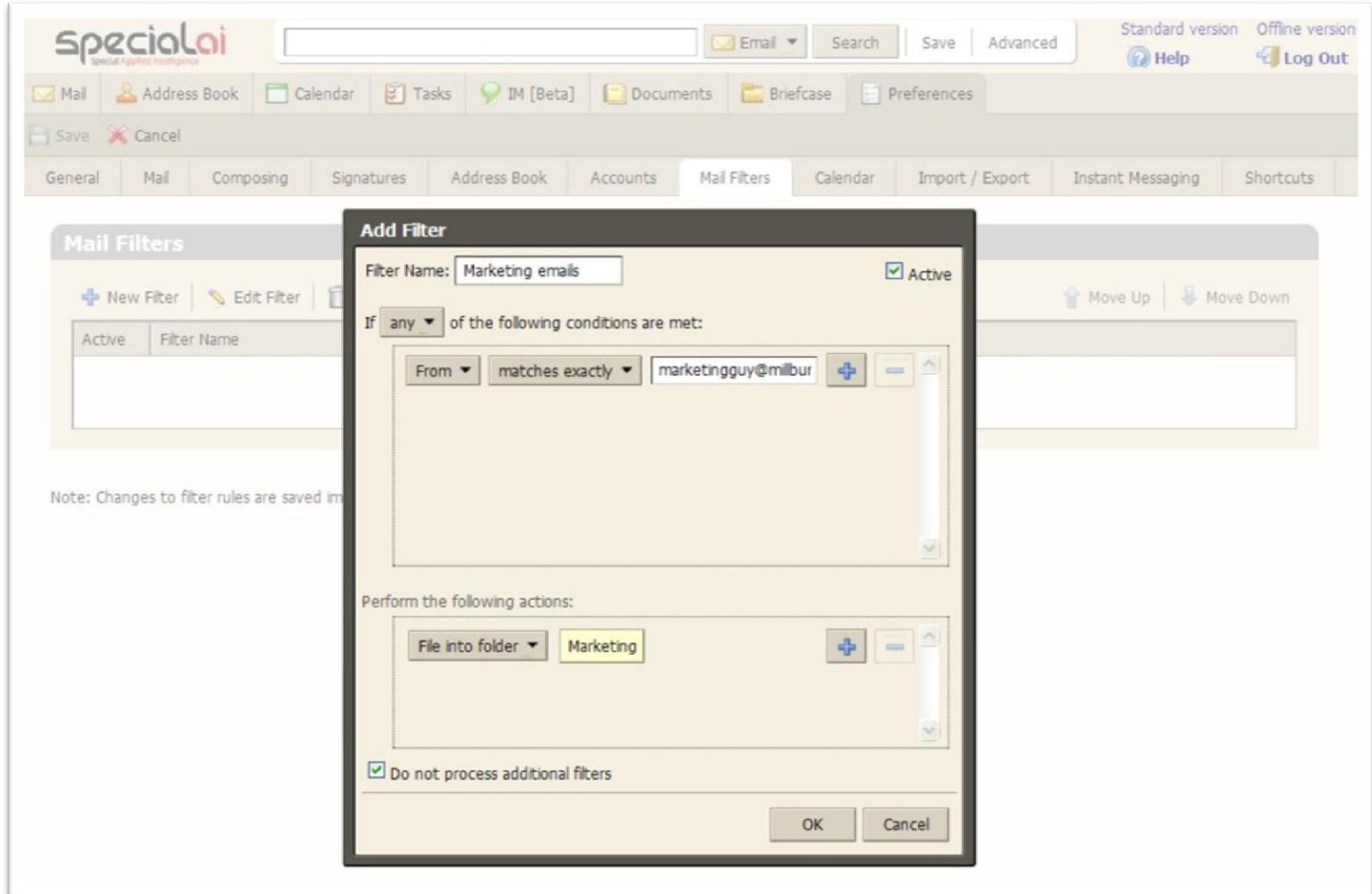
At the bottom of the dialog, there are "Save" and "Cancel" buttons. The "Buddy List" is visible at the bottom of the main interface.

The left sidebar contains a list of preferences categories: General, Mail, Composing, Signatures, Accounts, Filters, Trusted Addresses, Address Book, Calendar, Sharing, Notifications, Mobile Devices, Instant Messaging, Import / Export, Shortcuts, and Zimlets. The "Mail" category is currently selected.

At the bottom left, there is a calendar for August 2012. The dates are as follows:

S	M	T	W	T	F	S
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

Preferences: Filters



The screenshot shows the SpecialAI web interface with the 'Preferences' tab selected. The 'Mail Filters' sub-tab is active, displaying a dialog box for adding a new filter. The dialog box is titled 'Add Filter' and contains the following elements:

- Filter Name:** A text input field containing 'Marketing emails' and a checked 'Active' checkbox.
- Conditions:** A section labeled 'If any of the following conditions are met:' containing a single condition: 'From' matches exactly 'marketingguy@milbur'.
- Actions:** A section labeled 'Perform the following actions:' containing a single action: 'File into folder' Marketing.
- Additional Options:** A checked checkbox labeled 'Do not process additional filters'.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

The background interface includes a top navigation bar with 'SpecialAI' logo, search, and user options. A secondary navigation bar contains icons for Mail, Address Book, Calendar, Tasks, IM [Beta], Documents, Briefcase, and Preferences. Below this is a tabbed menu with 'Mail Filters' selected. The main content area shows a table for existing filters and a 'New Filter' button.

Preferences: Personas

The screenshot shows the SpecialAI web interface. At the top, there is a search bar with 'People Search' and a user profile for 'Homer Simpson'. Below this is a navigation bar with icons for Mail, Address Book, Calendar, Tasks, Briefcase, and Preferences. The Preferences window is open, showing a sidebar with various settings categories. The 'Accounts' section is selected, displaying a table of accounts and a 'Primary Account Settings' panel.

Accounts

Account Name	Status	Email Address	Type
Primary Account	OK	test@anglerlabs.com	Primary

Buttons: Delete, Add External Account, Add Persona

Primary Account Settings

Email address: test@anglerlabs.com
Account Name: Primary Account

Messages sent from this account have the following settings:

From: Choose the name that appears in the "From" field of email messages
Homer Simpson | test@anglerlabs.com

Reply-to: Set the "Reply-to" field of email messages to:
e.g. Bob Smith

Signature: [Manage your signatures ...](#)

Calendar: August 2012 (20th highlighted)

Buddy List: [IM beta]

Preferences: External Mail

The screenshot shows the 'External Account Settings' window in the SpecialAI application. The window has a dark grey header with the SpecialAI logo and a search bar. Below the header is a navigation bar with icons for Mail, Address Book, Calendar, Tasks, IM [Beta], Documents, Briefcase, and Preferences. The 'Accounts' tab is selected, showing sub-tabs for General, Mail, Composing, Signatures, Address Book, Accounts, Mail Filters, Calendar, and Import / Export. The main content area is titled 'External Account Settings' and contains the following fields and options:

- Email address:** example@gmail.com
- Account Name:** Gmail
- Account type:** POP3 IMAP
- Username of Account:** example@gmail.com
- Email Server:** mail.gmail.com
- Password:** [masked] Show password
- Advanced Settings:** Change IMAP port 993 (993 is the default) Use an encrypted connection (SSL) when accessing this server
- Test Settings** button
- Download messages to:** Inbox Folder: Gmail
- Delete messages on the server after downloading them
- Messages sent from this account have the following settings:**
 - From:** Choose the name that appears in the "From" field of email messages. Text: test test, dropdown: test@specialai.com
 - Reply-to:** Set the "Reply-to" field of email messages to: Text: e.g. Bob Smith, dropdown: Email Address
 - Signature:** Do Not Attach Signature

Preferences: Mobile

- The **Mobile Device** folder is available from the Preferences tab. This folder shows mobile devices you configured to sync with your ZWC account.
- From this folder, you can
 - Initiate a sync from ZWC to your device
 - Suspend a sync
 - Delete mobile devices you no longer use
- In addition, if your device is lost or stolen, you can wipe your device clean.

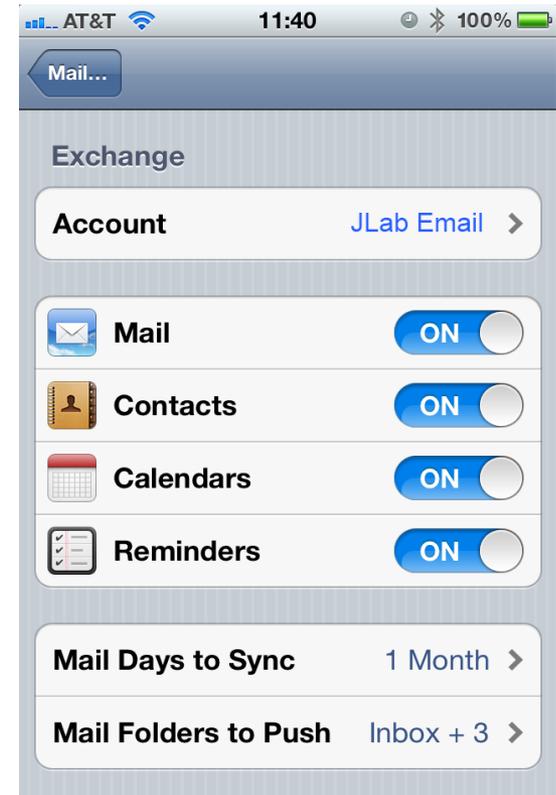
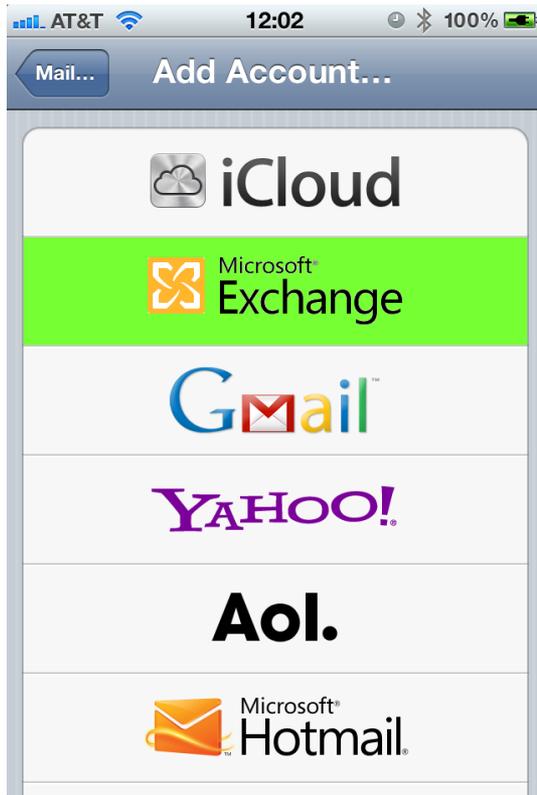
Preferences: Zimlets

Zimlets are small programs created as a mechanism to integrate third-party information and content with the Zimbra Web Client features. Zimlets let you interact with different content types in your email messages.

You can manage which Zimlets are displayed in your account from **Preferences > Zimlets**

- Click on the URL in a message to launch a browser window to go to that URL. Hover of the URL to see a preview of the site.
- Right-click on a phone number to make a call from your computer softphone, such as Skype or a Cisco VOIP phone.
- Right-click on a date within a message to see your calendar and to schedule a meeting without leaving the message.
- Right-click on a name, address, or phone number to update your address book.
- Other Zimlets may be available in your Overview pane..

Configuring Mobile Devices



Q & A

