The College of New Jersey

Zimbra™ Collaboration Suite User Guide Part 1

Getting Started

Zimbra™ Collaboration Suite is a full-feature messaging and collaboration application offering reliable, high-performance email, address book, calendar, and web document authoring capabilities. This Advanced Web Client User Guide provides in introduction to many of the **Zimbra Web Client** features. Please refer to the **Help** in the Web Client for more information about these features.

- Your account may not include all the features mentioned. Check with your system administrator to see which features are enabled for your account.
- If you are using the standard Web Client, many of the advanced Web Client features, such as drag and drop, right-click and HTML editing are not supported.

This guide describes the advanced Zimbra Web Client features. Many of the same features are available for the standard Zimbra Web Client but are not accessed as described in this guide. If you use the Standard Web Client, refer to the Help that is available on the Web Client.

Navigating your Web Client mailbox

Your Web Client mailbox combines email, calendar and address book tools under one easy log in.

The **Web Client** is designed to work within an internet browser. Microsoft Internet Explorer, Mozilla Firefox, and Macintosh Safari are three of the most popular. Not all browsers are supported, so check with the Help Desk if you have questions.

Some general guidelines when using the Web Client within a browser:

- Do not use the browser's **Back** button. This will take you out of the Web Client.
- To log out, click Log Out. If you browse to a different site without logging out first, your session may remain active.
- Do not use the browser's **Reload** or **Refresh** buttons. Doing so will download the client and start your session over.

Logging in and logging out

Two versions of the web client are available: **advanced** and **standard**.

Advanced Web Client offers the full set of web collaboration features. This Web Client works best with newer browsers and the faster internet connections.

Standard Web Client is a good option when internet connections are slow or users prefer HTML-based messaging for navigating within their mailbox.

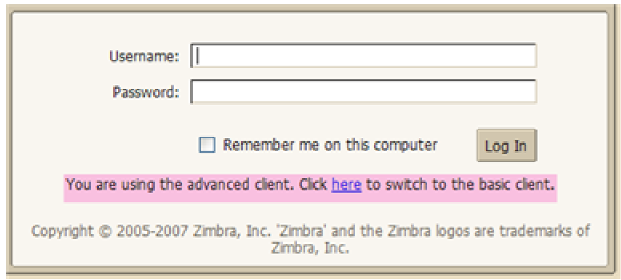
- Note: Many of the Web Client features described in this book do not apply to the basic Web Client.

You must log in and be authenticated in order to use the Web Client

Logging in

Open a browser window and enter the URL provided by the Help Desk.

When the log in dialog appears, you can log in to the advanced Web Client or, before you enter your name and password, you can click on the **Click here to switch to the basic web client** link.



If you check the **Remember me on this computer** checkbox, you do not have to log into the Web Client every time you restart the browser during a day. If you do not log out your session will remain active until the session expires or until your session times out.

When the log in screen appears, type your user name and password. You may be required to type your full email address as the user name.

Logging out

To prevent others from logging in to your email account, you should always use the **Log Out** link, located in the upper right of the Web Client page to close your session.

Forget your password?

If you forget your password, contact the Help Desk.

or conversation.

Using Folders

Folders can be used to store your mail messages. You can move items from one folder to another by dragging and dropping or by clicking **Move** from the right-click button on the mouse. You can move items from one folder to another by checking the message or contact and then select the folder from the **Move to** list.

Creating custom folders

You can create custom folders. Custom folders can be created inside other folders, including the system folders.

You cannot create two folders with the same name within the same parent folder. For example, you cannot have two folders named Shopping under your Inbox folder, but you could have one folder named Shopping under your Inbox folder, and another one with the same name under the Sent folder.

To create a new folder:

1. From the toolbar, click the arrow on the **New** button (New) and select **Folder**, or right-click in the Overview pane in the folders list and select **New Folder**. A **Create New Folder** dialog opens.
2. Type a folder name.
3. Select where to place the new folder. Click **Folders** to have the folder at the top level or choose a location from the list of existing folders. Your new folder is placed within the selected folder.
4. Click **OK**.

> To create a folder tied to an RSS or ATOM feed, check **Subscribe to RSS/ ATOM feed**, then enter a URL. The feed is automatically sent to the folder in your **Mailbox**.

Renaming folders

You can rename user-defined folders by right-clicking on the folder and choosing **Rename Folder**. Folder names can have any character except colon (:), forward slash (/), or double quotes (“”). System folders cannot be renamed.

Deleting folders

You can delete custom folders. You cannot delete system folders.

When you delete a folder, its contents are moved to the **Trash**. You can recover contents from the **Trash** by dragging and dropping them to another folder.

Creating Filters

Mail filters are defined from the **Options>Mail Filters** tab. Mail filtering allows you to define a set of rules and corresponding actions to apply to incoming email.

You can filter your incoming email messages to sort them into folders, automatically tag them, forward them, or discard them. When an incoming email message matches the conditions of a filter rule, the corresponding actions associated with that rule are applied. For example, you could define a filter rule to identify email coming from your immediate supervisor and move it to a folder called **From My Boss** or to automatically move messages from a specific address to the **Trash** folder.

Each incoming message is tested against your filter rules at the time that the email is delivered and the filter actions are applied to matching messages at that time.

- Filter rules are not case-insensitive, meaning that the rules ignore capitalization.
- Three of the comparison methods for filter conditions are **Contains**, **Matches**, and **Is**. These options appear for some items such as the **Subject** line.
- Wildcards can be used in comparisons that use the **Matches** comparison operator. The two wildcard characters are **asterisk (*)** and **question mark (?).**

To create or edit a new filtering rule:

1. Click the **Options** tab and then open the **Mail Filters** tab and click **New Filter**.
2. The **Add Filter** dialog displays.
3. In **Filter Name** type the name for the rule.
4. In the **If the following conditions are met** area, choose a grouping preference.
    - **Any conditions** means that if any of the conditions in the filter are met, apply the action.
    - **All conditions** mean that all of the conditions in the filter must be met in order to apply the filter action.

➡ You can also create a new filter from an email message. Right-click on the message, choose **New Filter**. The **Edit Filter** dialog displays with **From**, **To**, and **Subject** set with this information from the email message. If the filter conditions are correct, give the filter a name and click OK.

About Zimlets

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

- Click on the URL in a message to launch a browser window to go to that URL. Hover above the URL to see a preview of the site.
- Right-click on a phone number to make a call from your computer soft phone, 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 from the Overview pane.

If you do not see Zimlets listed in your Overview pane, your system administrator has disabled them.

Setting Your Preferences

Your default user preferences are configured when your account is created. These options define how your **Mailbox**, **Address Book**, and **Calendar** applications work. You can also set up your **Mail Identities** and POP accounts and select a theme for your mailbox.

You can change the settings from the **Options** tab. If the option described here is not visible in your view, the preference is not available for your account.

You can set preferences in the following tabs.

General

- You can choose to automatically include the **Junk** folder and **Trash** folder in any searches. By default these folders will not be searched.
- To always show the search string in the **Search** text box, check **Always Show Search String**. When this is enabled, the search text box displays the search query that produced the list of items that display in the Content pane.
- Set which text editor you want as the default, either HTML or plain text.
- Set the default font settings to be used when using HTML to compose in **Mail**, **Documents** and **Calendar**. You can define the font style, size and color to use as your default style. Arial, 12 pt black is the default.
- If **Change password** is displayed, you can change your password from this tab. If you have trouble changing your password, contact the Help Desk for the password rules.

  Contact your system administrator if you do not have this option and want to change your password.
- Select the **UI Theme** to define the background color for the **Mailbox** interface.

Mail

- Select how you want to group your email, by conversation or message. If you have the **Conversation** feature, **Conversation** is the default.
- Select how many items (messages or conversations) to display per page. The default is to display 25 items per page, but you can select 10, 50, or 100 items per page.
- The search defined in the **Initial mail search** field defines the search to execute when you log in. The default search is your Inbox. When you log in, the results of your Inbox display. You can change this field to have another folder, tag, or a **Saved Search** displayed when you first open the Web Client. See **Query Language Description** for the syntax.
- Polling interval is how often your computer checks for new email. The default is every 5 minutes. The minimum length of time is defined by the Help Desk.

- Set whether to show the Reading pane when viewing email. The default is to always show the Reading pane.
- By default, the **Save copies of messages to sent folder** is enabled. Copies of messages you send are saved to your Sent folder.
- Specify whether to reply to incoming email with a vacation message saying that you are out of the office, and what the message should say. This is also sometimes referred to as an out-of-the-office auto-reply.
- Enable and specify an address to send notifications that you have received new email.
- Specify an address to forward your email to. You can have the original email deleted from your mailbox.
- Specify whether to view email as HTML, for messages that have been formatted as HTML. Turning this off causes email to be displayed as plain text, showing the HTML tags themselves rather than applying them as markup.
- Configure **If I send a message that I then receive** to handle messages that you send that include your address as one of the recipients of the message, or that go an address such as a mailing list that includes you.
- **Always compose in new window** opens a new **Compose** window, separate from your mailbox, when you compose a message. You can view and navigate your mailbox while the Compose pane is open.

Mail Identities

You can create different **Mail Identities** to manage different roles in your job and personal life from one account.

Identity Options. Used to set up your **Mail Identity**.

Signature.

- Specify the placement of the signature in your email messages: either add the signature below all messages in the email, or have the signature added at the end of your composed, replied to, or forwarded text.
- Enter the signature that should appear on your email messages.
- Specify whether to automatically add a signature to all outgoing email messages. You can create a signature and not enable it. When you compose a message, an **Add Signature** button displays in the compose tool bar. When you click it, your signature is added to your message.

Advanced. The advanced tab is used to configure how you would like reply to and forward messages. The default style is defined in the **Default Identity** configuration. When you create new identities, you can use the same settings as the **Default Identity** or you can set different preferences.

- Select the **Reply/ Forward** format to use to compose the message. Choose either to compose using the same format as the original received message, using plain text, or using HTML.

- Specify whether to prefix each line with > or **|** for the previous email messages that are forwarded or replied to, if you chose to quote original text.
- Select whether to include the original text in the body of your reply message. You can choose to include original text, not include the text, include the text as an attachment, include the text in the body with a prefix that you choose, or include only the most recent message. (In other words, it will quote only what was written by the person who sent the message, and not previous text.)
- Specify how to include the original text of a message when you forward a message, in the body of the message, in the body with a prefix, or as an attachment.

POP Accounts

Instead of logging in to each of your POP email accounts, you can check your POP accounts for email messages directly from the Web Client. When you set this up, you can organize where the messages will be saved and create a **Mail Identify** to be used when you reply to or forward a message received from the POP account.

Mail Filters

Use this tab to define your mail filtering rules.

Address Book

- Enable the feature to automatically add addresses to your **Address Book** when you send email. If this is enabled, addresses are saved to your **Email Contacts** folder.
- Enable to use the **Global Address List** when auto completing addresses.
- Select whether you would prefer to view **Contacts** as a list or as business cards.
- Select the number of **Contacts** to display per page. The default is 25.
- Import contacts to your **Contacts** list. The file to import must be in a comma-delimited format (.cvs).
- Export your **Contacts** list. The file exports in a coma-delimited format (.cvs).

Calendar

- Select how you would like to view your **Calendar**. The default is by work week.
- Specify which day of the week should be the first day of the week in your calendar.
- If you travel between time zones, you may want to select to show the time zone list in the appointment view.
- If you create many appointments without attendees, check **Use the QuickAdd** dialog.
- A mini-calendar is displayed in **Calendar**. You can enable mini-calendar to be visible from any view.

- Set the number of minutes before an appointment to be reminded. The default is five minutes.

Shortcuts

Keyboard shortcuts let you use the application without going to the mouse. A large number of shortcuts is available. You can also create custom shortcuts by assigning numeric aliases to folders, tags, and **Saved Searches**.

- The **Shortcut** list shows all the existing keyboard shortcuts.
- The **Mail Folder Shortcuts** tab is used to create a shortcut to quickly go to your email folders and to move a message to that folder. You select the folder and assign a number to it. For example, if you assign **3** to the Inbox folder: From anywhere in your mailbox, typing **v3** will move you to the Inbox. Selecting an item and typing **3**, will move the item to the Inbox.
- The **Saved Search Shortcuts** tab is used to create shortcuts to quickly access **Saved Searches**. You select a **Saved Search** and assign a number to it. For example, if you assign **3** to your favorite search, then from anywhere in your mailbox, you can type **s3** to quickly run that search.
- The **Tag Shortcuts** tab is used to create shortcuts to quickly access all items with a specific tag or apply a tag to a message or contact. You select a tag and assign a number to it. For example, a tag called **Followup** is assigned 3. From anywhere in your mailbox, you can type **y3** to see all items marked with **Followup**. Select an item and type **t3** to tag that item with **Followup**.

You can assign any number, but it cannot be repeated within a shortcut tab.

Restoring default options

On each of the **Options** tabs except for the **Filter Rules** section, the **Restore Defaults** button resets any changes you have made to your user preferences, to the default system settings that were in effect when you first logged in to your new account. You must click **Save** in order to commit these changes.

> This reset feature does not affect changes to passwords.

Mailbox quotas

In order to keep disk and resource usage to a manageable level, the Help Desk may enforce quotas to limit the amount of disk space your mailbox can consume.

The display banner under your name in Web Client shows a bar showing how much of your quota you have used.

If you are over quota, the following things may happen:

- You receive a notification.
- Your email interface may display a notification when you log in.

- Email sent to you may be returned (bounced), along with a notification that your mailbox is full.

To reduce the size of your mailbox, you can do the following:

- Delete old messages that are no longer needed.
- Look for messages with large file attachments and delete those. Save the file attachments locally if you want to preserve them.
- Empty the Trash folder.

  The Web Client also supports automatic purging of messages that are over a certain number of days old. Your email administrator sets the policy for when messages are purged, how old they have to be, and which folders are purged.

Subscribing to a RSS/ATOM feed

You can subscribe to Web sites that provide your favorite RSS (Really Simple Syndication) and podcast feeds to send updated information directly to your mailbox.

You create a folder for each RSS feed.

To subscribe to a RSS/Atom feed:

Before proceeding, find out the URL for the RSS.

1. From the toolbar, click the arrow on the **New** button (New) and select **Folder**, or right-click in the Overview pane in the folders list and select **New Folder**. A **Create New Folder** dialog opens.
2. Type the folder name and check **Subscribe to RSS/ ATOM feed**. The **URL** field displays.
3. Enter the RSS URL from the web site to the **URL** field.
4. Click **OK**.

The folder is created in your Overview pane. Open the folder to access the link. To update the content, right-click and select **Reload** in the folder.