



# eXo Collaboration User Guide

## Version 2.1.1

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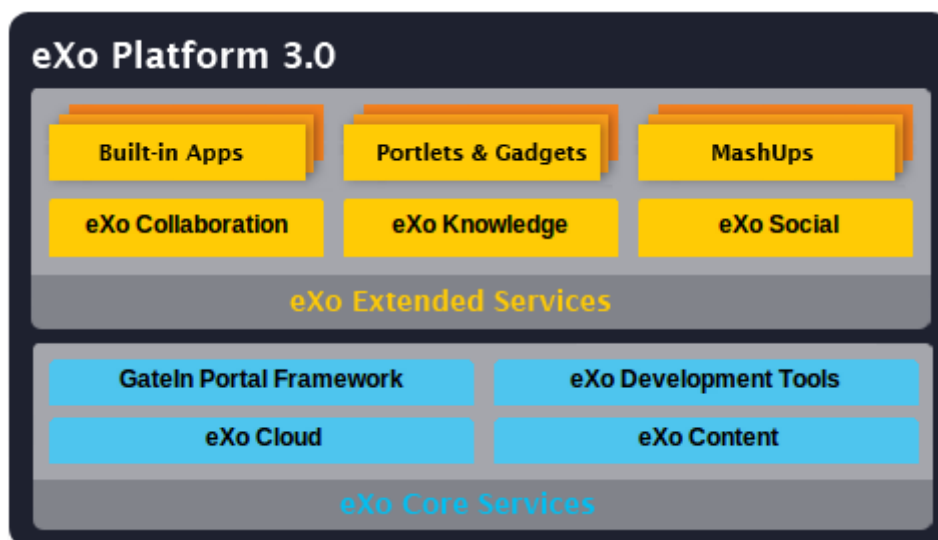
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# 1 Preface

## 1.1 Overview

Beginning as an Open Source project in the year 2002, eXo is well-known as the industry's first Java portlet container. With the aim of dominating the potential portal market through robust and easy-to-use applications, eXo Project succeeded in attracting consumers in the whole world. eXo actually opened the floodgates to various options in many markets, and customers have been choosing eXo as the best method for their success.

The eXo Platform™ software is a powerful Open Source corporate portal and content management system. Users of the platform have a customized single point of access to the company's information system and resources.



The foundation for eXo Platform 3.0 is eXo Core Services, a powerful set of REST-based services for rapid website development, content management and gadget-based development and deployment. eXo Extended Services are also a part of the eXo Platform 3.0 running on top of eXo Core Services to enable easy development of rich, user-centric web applications.

eXo Collaboration is one of eXo Core services, it provides productivity tools to extend your java applications. eXo Collaboration offers intuitive and powerful Address Book, Calendar, Chat and Mail functionality as a seamless extension to your portal-based application.

## 1.2 About this document

The intended reader of this manual is users of eXo Collaboration. This manual will explain all the

basic and advanced features of all the applications that eXo Collaboration provides, including Address Book, Calendar, Chat and Mail. It gives an in depth examples and easy explanation of using these applications.

This user guide will:

- Define some basic concepts used in the applications.
- Guide step by step to do the basic actions for all the applications. For example, using Chat application, users can create an account, add/remove contacts, send instant message to other contacts, create chat room, send files, etc; or for Address Book application, users will know how to create, edit, manage & share contacts.
- Each application will be addressed in dedicated chapter.

## **1.3 References & related resources**

### **Related Documents**

- [eXo GateIn Guide 3.2](#)

### **Info & Support**

#### **Information**

- [eXo Home Page](#)
- [eXo Wiki](#)

#### **Support**

- [Forums](#)
- [FAQ](#)

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## 2 Collaboration Address Book

### 2.1 Get started

#### 2.1.1 What is Collaboration Address Book?

Collaboration Address Book is a contact manager that allows you to all the contact information (contact name, company name, address, email, phone number, etc). Moreover, the integration of Address book and other applications in eXo Collaboration helps you to improve group productivity when you have to work in collaborative environment. . You can use contacts' information stored in your Address Book to use in Chat friend list, Calendar or Mail.

#### 2.1.2 What you can do with Collaboration Address Book?

Address Book is simple to use but offers wide range of features. With Collaboration Book, you can:

- ✓ Create Public, Group and Private address books
- ✓ Share Address book and contacts
- ✓ Search and manage multiple contacts easily
- ✓ Import/Export contacts or address book quickly
- ✓ Use Tags to mark important contacts and manage contacts without headaches
- ✓ View and print contacts' information in form of vCard.

#### 2.1.3 Access to Address Book

In Collaboration, you can quickly access to applications via the chat bar located at the bottom of screen. Each Collaboration application is represented by an icon. By clicking this icon you can go to the corresponding application.

To access to Address Book, click the Address Book icon  right from the Chat bar:



## 2.1.4 Address Book interface

Before starting to use Address Book, you should familiarize your self with the interface which has six basic components:

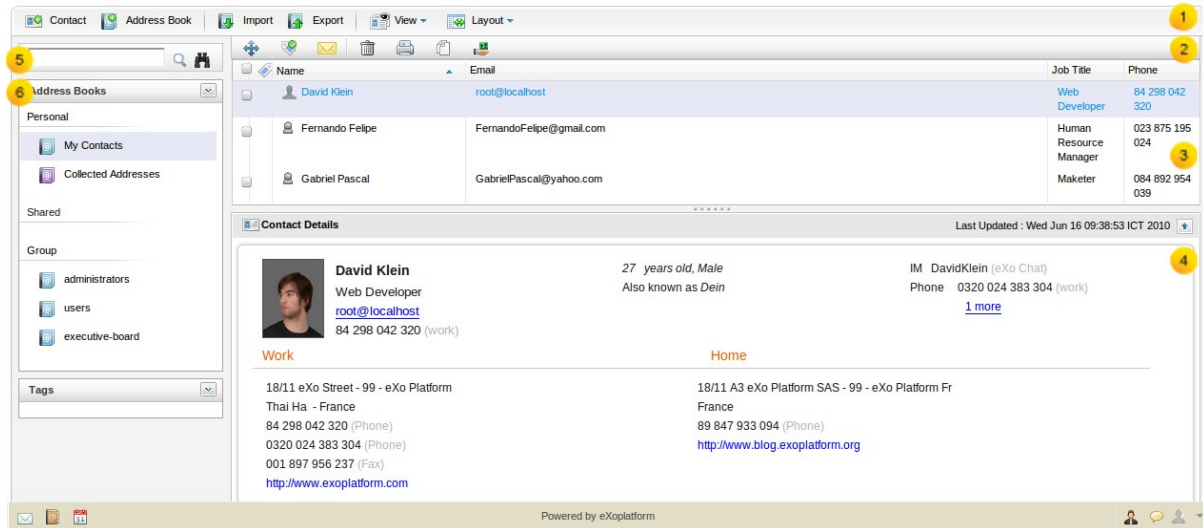


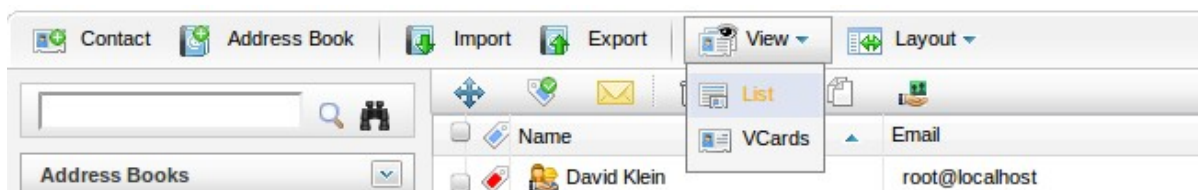
Illustration 1: The main screen of the Address Book application

### Details

1	The <b>Tool bar</b> which allows you to add new contact/address book, import/ export address book, view and customize layout.
2	The <b>Action bar</b> which allows you to taking basic actions such as move, delete, copy, print, add tag selected contacts
3	The <b>Contact list</b> which shows all contacts in a specific address book
4	The <b>Contact view panel</b> which displays detail information of the selected contact
5	The <b>Navigation panel</b> which contains search panel, address books list and tags list
6	The <b>Search panel</b> which allows you to do the quick and advanced search to find contacts.

## 2.1.5 Contact view modes

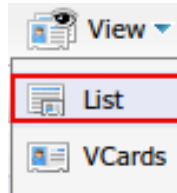
This function allows personalizing your contact view from many different view types, available for selecting. At present, your contacts can be viewed in 2 modes: List or Vcards.



### 2.1.5.1 List View

The list view displays all contacts in list panel and detailed information of the selected contact in Contact view panel. To view contacts by list view, do as follows:

In Main tool bar, click **View** icon then select **List** in the menu:



The contacts are displayed in the list below:

	Name	Email	Job Title	Phone
<input type="checkbox"/>	David Klein	root@localhost.tmp	Web developer	–
<input type="checkbox"/>	Fernando Felipe	FernandoFelipe@gmail.com	Manager	01 736 587 348
<input type="checkbox"/>	Gabriel Pascal	GabrielPascal@hotmail.com	Marketer	–
<input type="checkbox"/>	Mathew Pette	MathewPette@yahoo.com	Seller	34 4 587 986 438



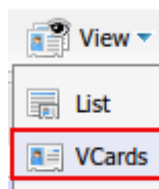
<b>Contact Details</b>		Last Updated : Tue Apr 27 12:53:41 ICT 2010	
			
<b>Gabriel Pascal</b> Marketer			
<b>Profile</b>			
Gender : Male		Birthday : 02/05/1981	
		Email :  GabrielPascal@hotmail.com	

Illustration 2: The List View form

### 2.1.5.2 vCards View

Vcard is a file format standard for electronic business cards. It is a powerful new means of Personal Data Interchange (PDI) that is automating the traditional business card. In Collaboration Address Book, you have the option to view your contact details in form of vCard.

Click  **View** in the toolbar then select **VCards** in the menu:



The contact details will be displayed like the illustration below:

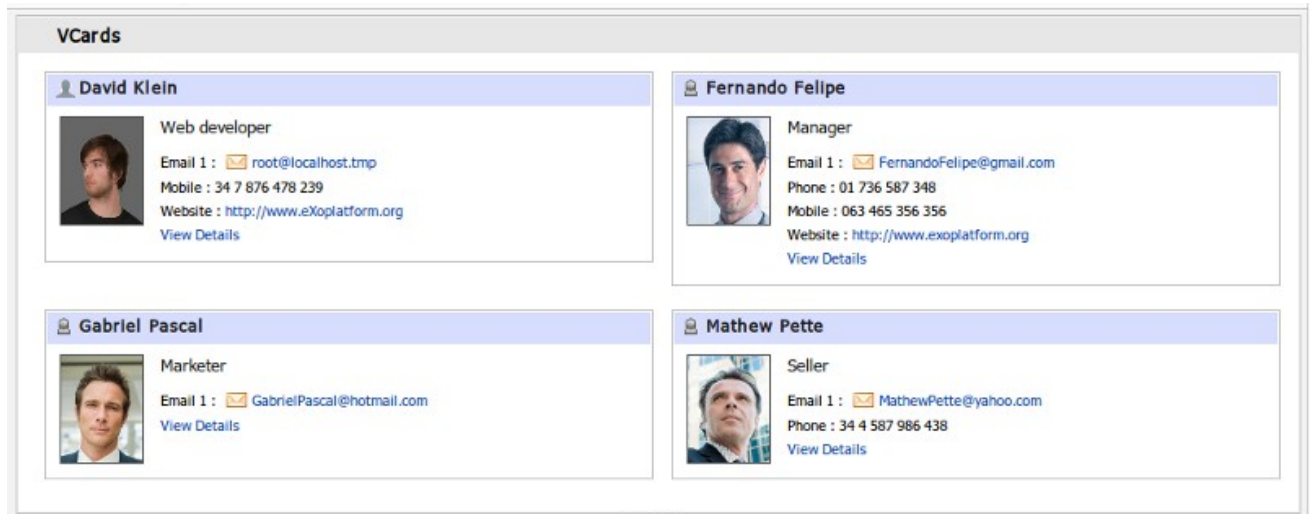
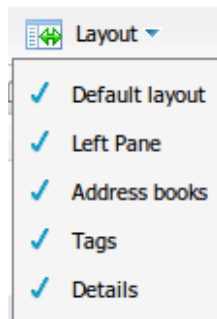


Illustration 3: The vCards View form

## 2.1.6 Change the layout

Collaboration Address Book layout can be customized. You can hide or unhide specific parts of Address Book interface.

- ✓ To change the layout, simply click **Layout** button on the main tool bar then select the layout you want in the drop-down menu.



## 2.1.7 Default Address Books

By default, there are 3 categories of address books in Address Book:

**Personal address book** is the address book that can only be viewed by you.

- **My contacts** is the default personal address book which contains your default contact matching with your registration information.
- **Collected Address book** contains all email contacts updated automatically during using Mail application. For example, when you receive an email sent from a new sender address which is not in your address book, this address will be automatically added to the Collected Address book.

**Shared address book:** This address book can be shared with other users. In Address Book, it is

stored in the Shared list. The shared address book can be viewed and updated by shared users if they are granted edit permission.

**Group address book:** This address book is shared by group and can be viewed by members in that group. In Address Book, the group address book contains default contacts of the other users in different groups and can be viewed only.


## 2.2 Address Book Management

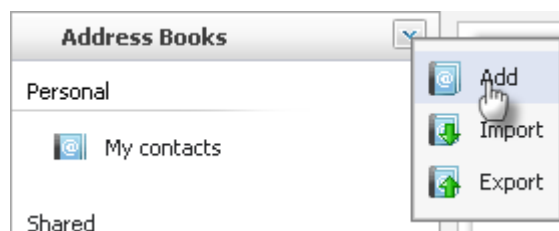
### 2.2.1 Create new address book

- ✓ To create an address book, do as follow:

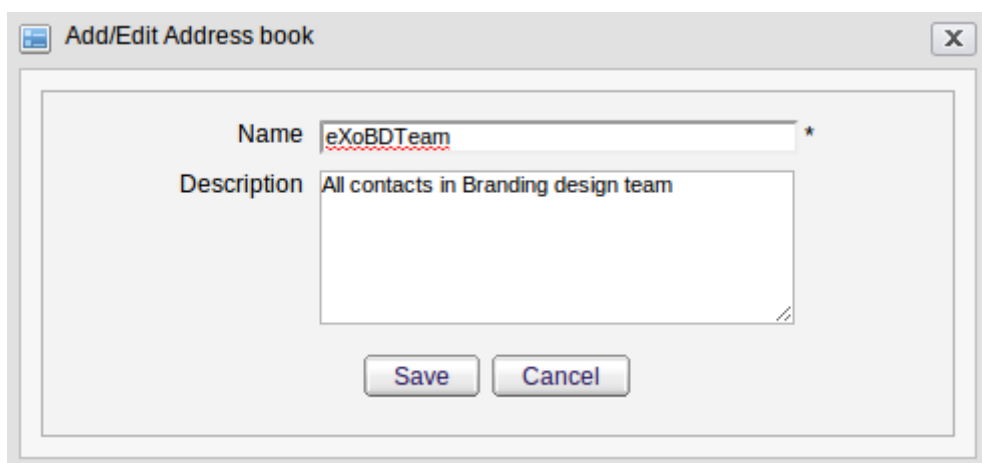
**Step 1:** Open the **Add Address book** form. There are three ways to do this step:

**The 1<sup>st</sup> way:** Click the  **Address Book** button on the main tool bar.

**The 2<sup>nd</sup> way:** Click the  icon in the Address Book bar and select **Add** in the drop-down menu:



The Add/edit Address book form will appear:

The image shows a dialog box titled 'Add/Edit Address book'. It has a close button (X) in the top right corner. Inside the dialog, there are two fields: 'Name' and 'Description'. The 'Name' field contains the text 'eXoBDTeam' and has a red dashed underline. The 'Description' field contains the text 'All contacts in Branding design team'. At the bottom of the dialog, there are two buttons: 'Save' and 'Cancel'.

**Step 2:** Type the name and description for your new address book, then click **Save** to finish.



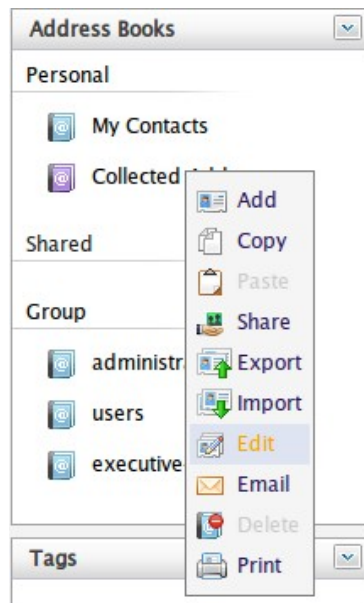
You can also create a new address book from the Collaboration Mail

## 2.2.1 Edit an address Book

This function allows you to edit information of selected address book.

- ✓ To edit an address book, do as follows:

**Step 1:** Right click on an existing address book and select **Edit** in the drop-down menu:



**Step 2:** The Add/Edit Address Book form will be displayed. Make changes to your address book then click **Save** to accept changes or **Cancel** to exit the form without changes.



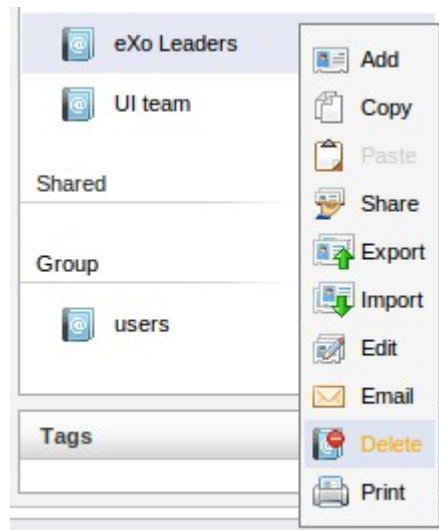
You can only edit a personal address book or a shared address book in case you have the edit permission.  
You can not edit a group address book.

## 2.2.2 Remove an address book

This function allows removing an address book from the address book list.

- ✓ To remove an address book, do as follows:

**Step 1:** Right click on an existing address book, and then select **Delete** in the menu:



**Step 2:** Click **OK** in the confirmation message to accept deleting the address book or click **Cancel** to abort.



- You cannot delete your default and group address book.
- You can delete your personal address book which is added by yourself flexibly.


## 2.2.3 Export an address book

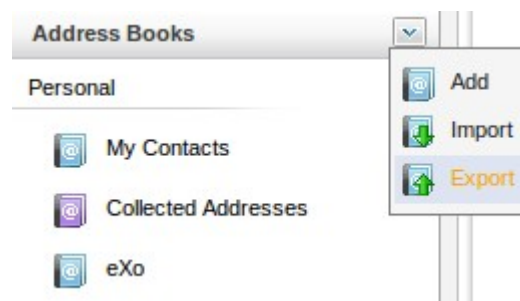
This function allows exporting one or more address books into a separate file in your computer in order to make it easy to backup your address book or import it into another address book application.

- ✓ To export an address book, do as follows:

**Step 1:** Open the **Export Address Books** form. There are two ways to do this step:

**The 1<sup>st</sup> way:** Click the Export button  in the main tool bar

**The 2<sup>nd</sup> way:** Click the  icon in the Address Books bar and select **Export** in the menu:



The **Export Address Books** form will appear with a list of all existing address books:

<input type="checkbox"/>	Name
<input type="checkbox"/>	My Contacts
<input type="checkbox"/>	Collected Addresses
<input type="checkbox"/>	eXo
<input type="checkbox"/>	executive-board
<input type="checkbox"/>	administrators
<input type="checkbox"/>	users

Total pages: 1

Name  \*

Export format **x-vcard**

**Export All** **Export Selected** **Cancel**

Illustration 4: The Export Address Books form

**Step 2:** Select the address book which you want to export by selecting its corresponding check box (you can select the top checkbox to select all)

**Step 3:** Enter a file name for the **Name** field

**Step 4:** Select format for the imported file (e.g x-vcard)

**Step 5:** Click the **Export All** button to start exporting all the address books or click the **Export Selected** button to export the selected ones only.

A download pop-up window will appear. Depend on what browser you are using, the download pop-up window may show differently.

## 2.2.4 Share an address book

This feature allows you to share your personal address books with specific user groups. The shared address book will be displayed in the shared address book list of your selected groups or users and can be viewed, exported, added, edited or deleted (if the shared user has the edit permission on it). The shared address book is distinguished from the other address books by a



hand symbol:

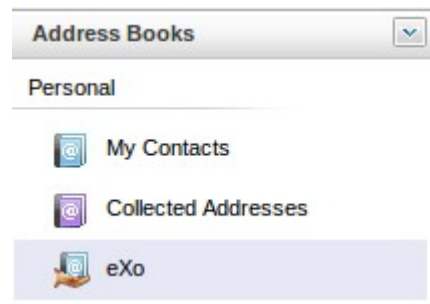


Illustration 5: The shared address books

- ✓ To share a personal address book, do as follows:

**Step 1:** Right click on the address book you want to share and select **Share** in the drop-down menu:



The **Share address book** form will appear:

Shared to	Can edit?	Actions
Empty data		

Address book: My Contacts

User

Group

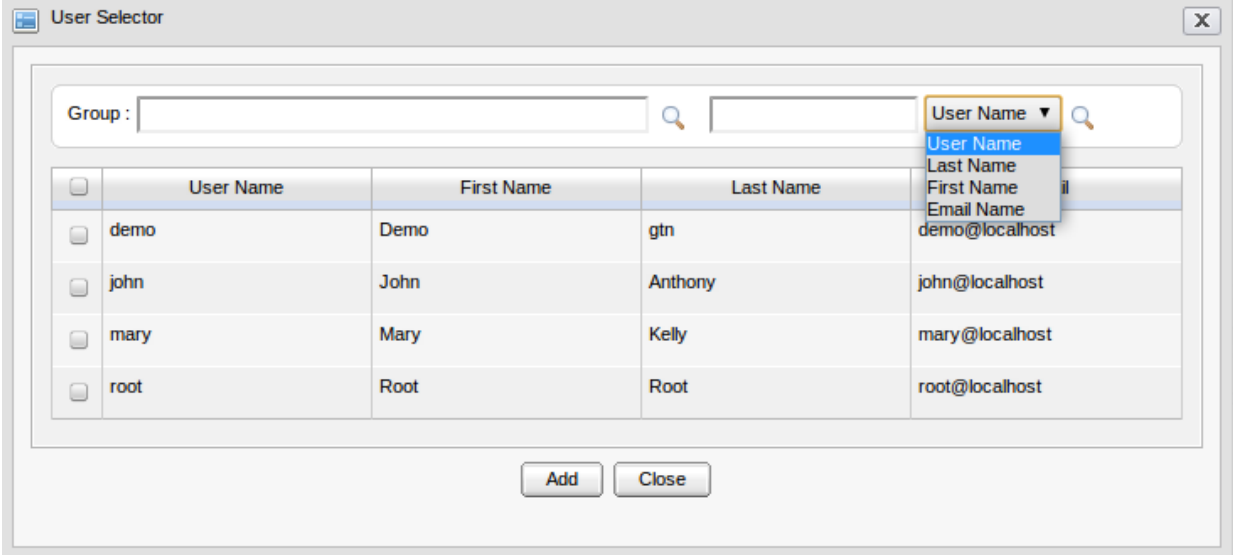
Can edit? ☐

Save Close

**Step 2:** Select users/group to share.

- ✓ To select Users for sharing:

Click the  icon, the **User Selector** form appears:




The screenshot shows the 'User Selector' dialog box. It has a title bar with a close button (X). Inside, there's a 'Group:' label followed by a search input field with a magnifying glass icon. To the right of this is a dropdown menu currently showing 'User Name' with a search icon. Below these is a table with four columns: 'User Name', 'First Name', 'Last Name', and 'Email'. The table contains four rows of user data. Each row has a checkbox in the first column. At the bottom of the dialog are two buttons: 'Add' and 'Close'.

<input type="checkbox"/>	User Name	First Name	Last Name	Email
<input type="checkbox"/>	demo	Demo	gtn	demo@localhost
<input type="checkbox"/>	john	John	Anthony	john@localhost
<input type="checkbox"/>	mary	Mary	Kelly	mary@localhost
<input type="checkbox"/>	root	Root	Root	root@localhost

**Illustration 7: The User Selector form**

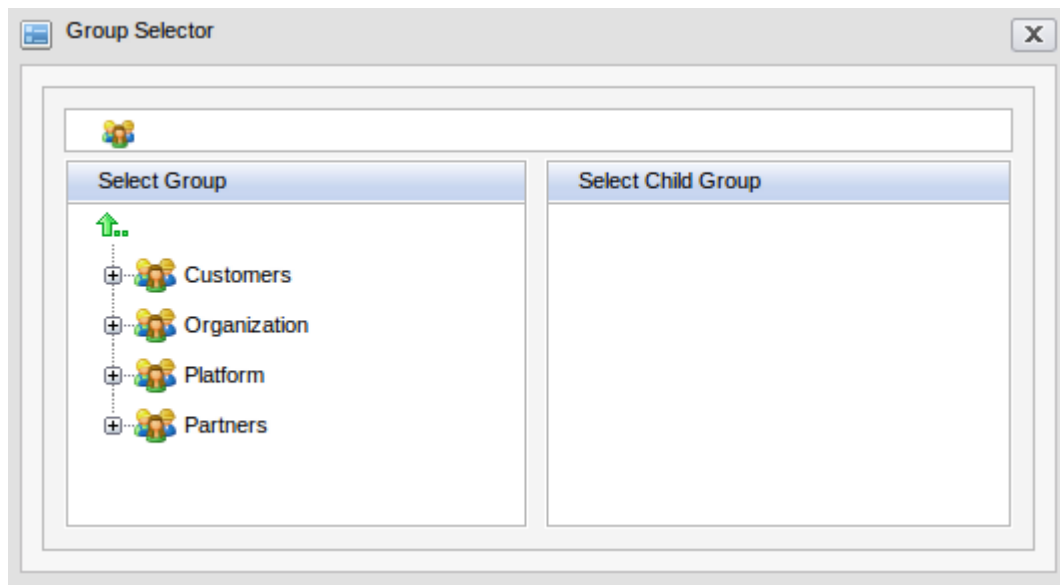
Select user(s) to share by clicking on the corresponding check-box(s).

You can also select specific user(s) by User name, Last name, First name, Email. Type key words in the search box, select the search criteria and then click the  icon to search.

Click the **Add** button to add selected users to the shared list or click the **Close** button to close this form.

- ✓ To select a group for sharing:

Click the  icon, the **Group Selector** form will appear:

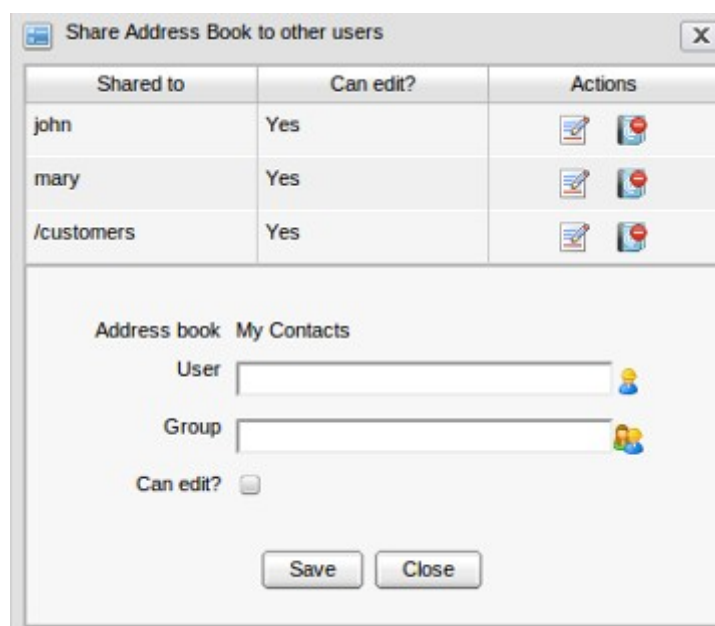




**Illustration 8: The Group Selector form**

**Step 3:** Select groups in the left panel to view sub-groups in the right panel, and then select a sub-group. After selecting User/group to share, click **Save** to accept sharing with the selected user/group or click **Close** to quit the sharing form.

You can select the “**Can edit?**” check box if you want to grant edit permission on this address book to the selected user/group. The user/group(s) having edit permission can view export, import, add, edit and delete the shared address book while the user/group does not have edit permission can view and export only.

After sharing, the shared users/groups will be updated into the Share list with detailed information like the illustration below:



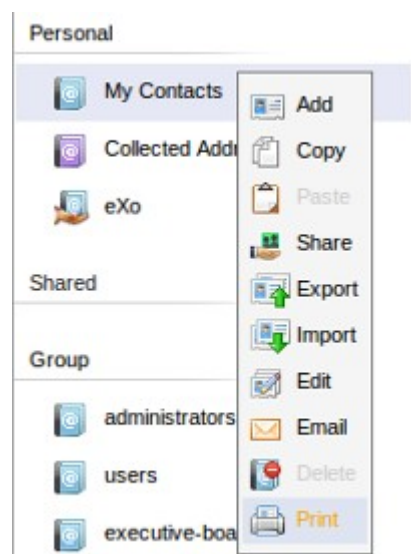
You can click the **Edit** icon  to change the edit permission of corresponding user/group or click the icon  to remove specific user/group from the Share list.

## 2.2.5 Print an address book

This function allows you to print summary information of contacts in form of visit cards. You can print all contacts of an address book at the same time.

- ✓ **To print address book, do as follows:**

**Step 1:** Right click on the address book which you want to print and select **Print** in the drop-down menu:



The print preview page will appear:



Illustration 9: The vCards Print Preview form

**Step 2:** Click the **Print** button to start printing or the **Close** button to exit the preview print dialog.

## 2.3 Contact management

A contact is a person or an organization you've added to your contact list. By adding a person as a contact, you can easily check out the person's or the organization's profile (name, address, email and phone number). In this section, you will know how to implement actions related to contact.

### 2.3.1 Add a new contact

This function allows you to add new contacts to personal address books and shared address books (if you have the edit permission).

- ✓ **To add a new contact, do as follows:**

**Step 1:** Open the **Add Contact** form. There are 2 ways to do this step:

**The 1<sup>st</sup> way:** Click the  button on the main tool bar .

**The 2<sup>nd</sup> way:** Right click on an address book (for example My Contacts), and click **Add** in the menu.

**The 3<sup>rd</sup> way:** You can also create a new contact from the Mail portlet.

The **Add/Edit Contact** form will appear:

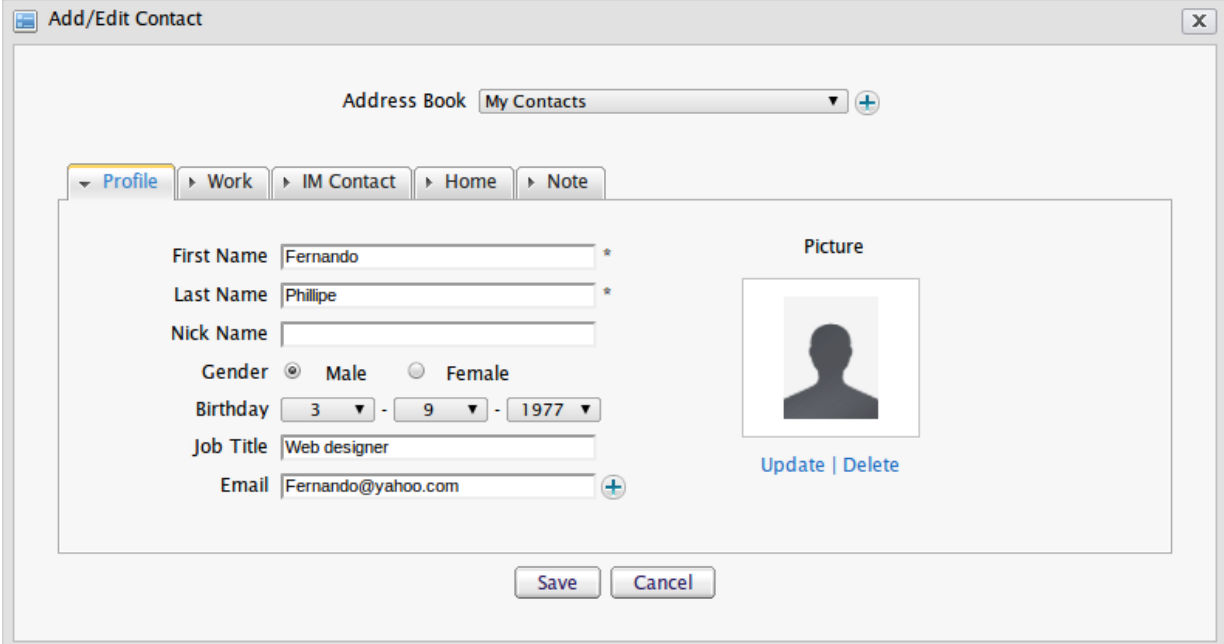


Illustration 10: The Add/Edit Contact form

**Step 2:** Input information into the Add/Edit Contact form.

**Step 3:** Click **Save** to accept adding a new contact.

Details of Add/Edit Contact form:

- ✓ The **Profile** tab:

select address book

create new address book


add new email address

change avatar



delete avatar

Illustration 11: The Profile tab of the Add/Edit Contact form

If you want to change picture (avatar) for the contact, click the **Update** link to upload photo from your computer. To remove your uploaded image, simply click the **Delete** link below your avatar picture.

Click the icon  at the **Email** field if you want to adding more email addresses for the contact. When it is clicked, more Email address fields will appear:

Email

Add new email address by clicking the icon  or remove by clicking the icon .

- ✓ The **Work** tab:

Address Book: My Contacts

Profile Work IM Contact Home Note

Address  
City  
State/Province  
Postal Code  
Country  
Phone  
Phone (secondary)  
Fax  
Mobile  
Web Page

Save Cancel

**Illustration 12: The Work tab of the Add/Edit Contact form**

The IM Contact tab contains information about chat nick. (IM stands for instant message).

The default one is Chat. You can click the  icon to choose other kinds of mail service.

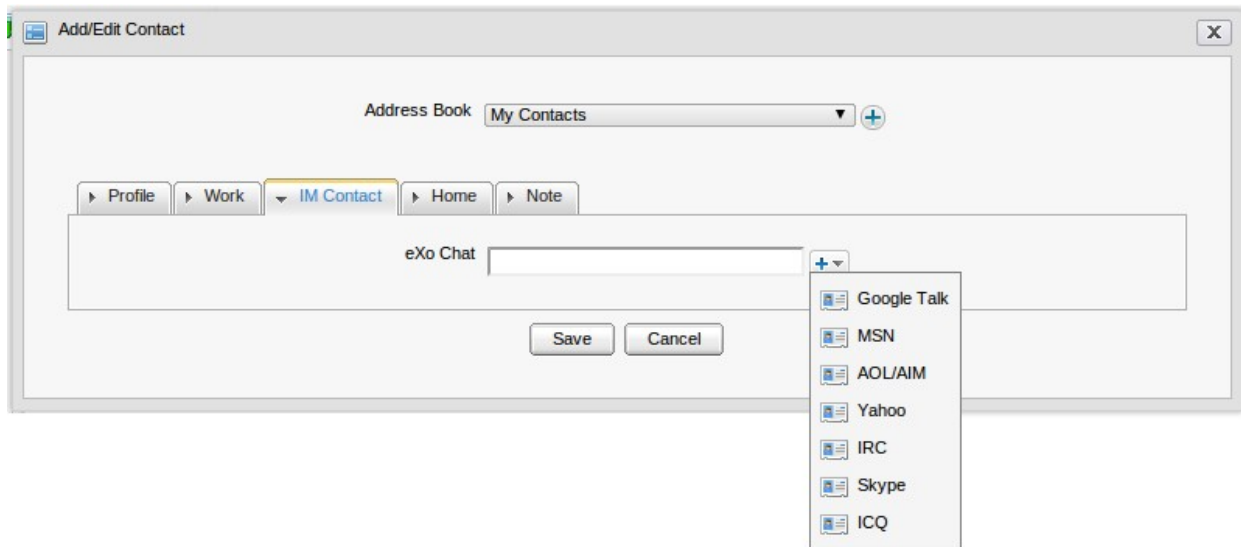
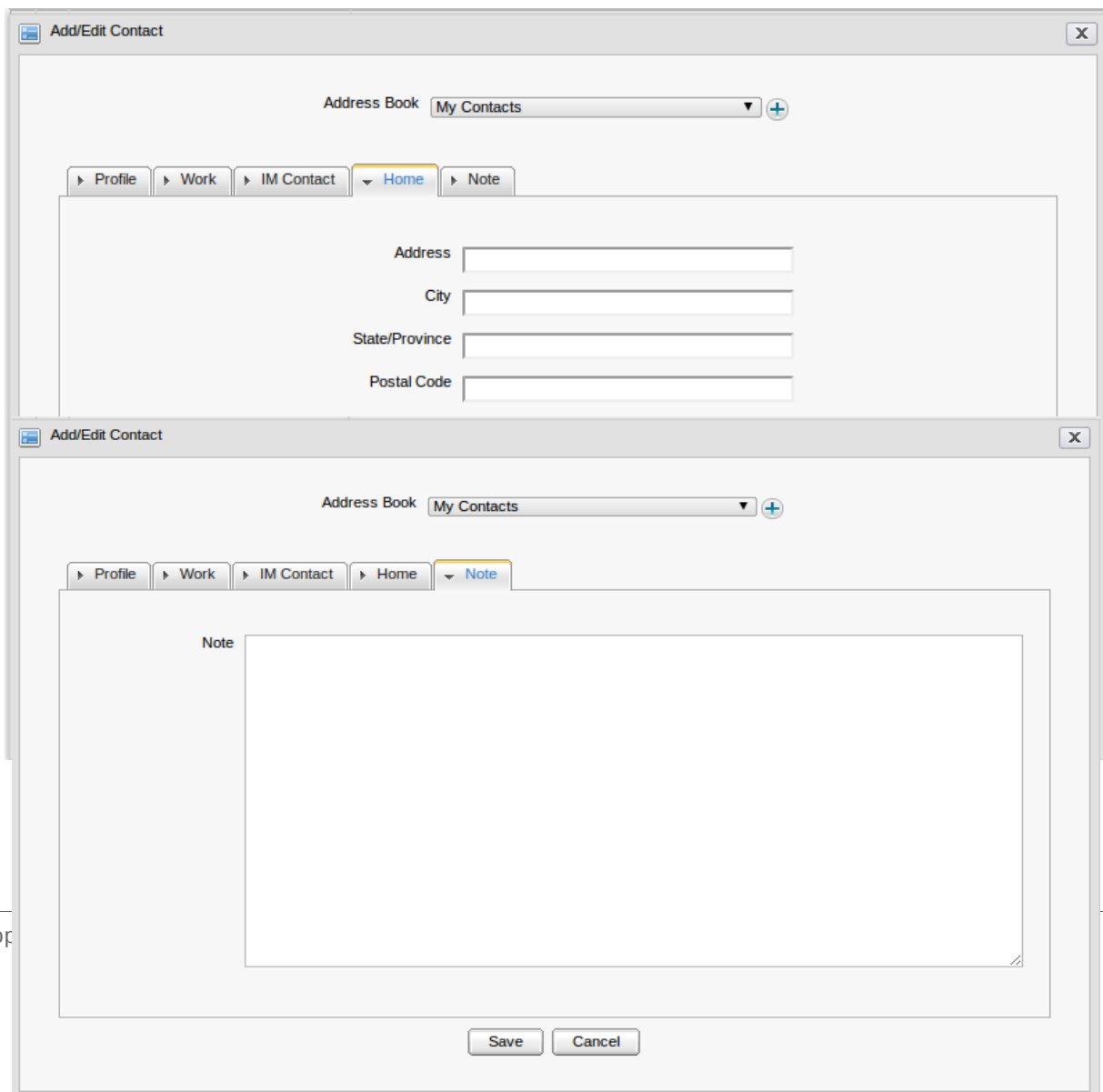


Illustration 13: The IM Contact tab of the Add/Edit Contact form

- ✓ You can add further contact information in the **Home** tab and **Note** tab:





## 2.3.2 Edit contact information

This function allows you to make changes to the information of selected contacts. You can only edit a contact of the personal or shared address books (if you have edit permission).

✓ **To edit a contact, do as follows:**

**Step 1:** Right-click an available contact in list, and then select **Edit** in the drop-down menu.

The **Edit Contact** form will appear with current information :

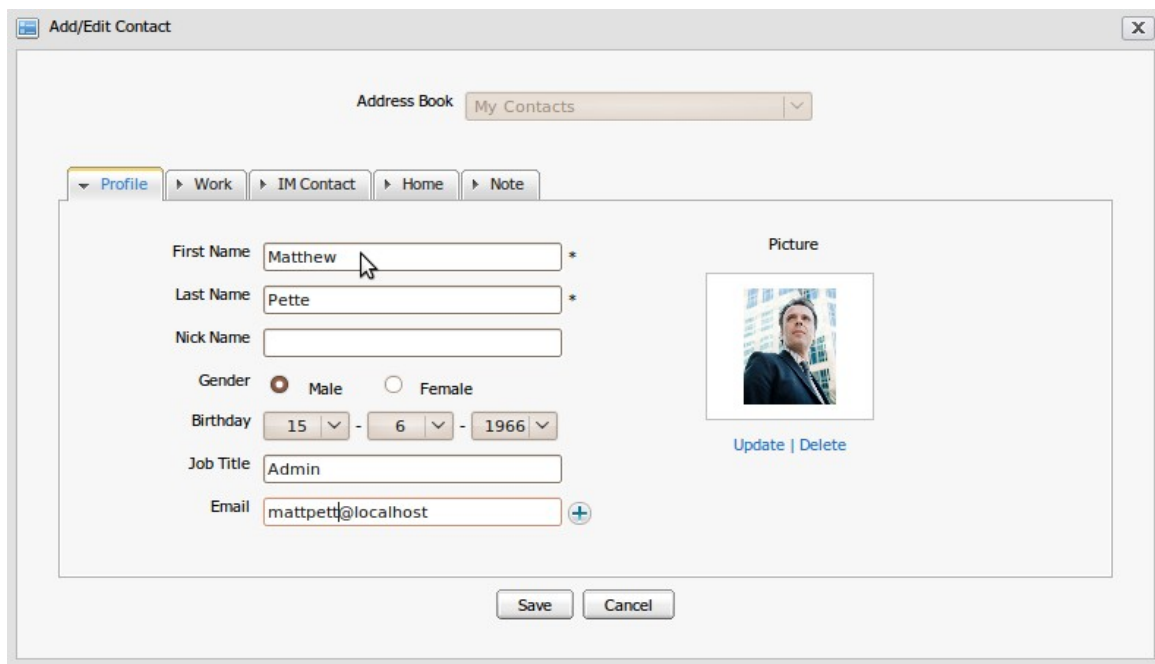


Illustration 14: The Add/Edit Contact form with full filled information, available for editing

**Step 2:** Change information of the current contact. You can change all information, avatar of your expected contact

**Step 3:** Click **Save** to accept changes.



You can also edit an address book from Mail portlet

## 2.3.3 Delete a contact

This function allows deleting existing contacts. You can only delete a contact of personal or shared address books (if you have edit permission).

There are two ways to delete a contact:

**The 1<sup>st</sup> way:**

**Step 1:** Right click on a contact of address book which is opening and then select

**Delete** in the menu.

**Step 2:** Click **Delete** on the confirmation message form to delete the selected contact or click **Cancel** to quit.

**The 2<sup>nd</sup> way:**

**Step 1:** Select check box(s) in the first column to select one or more contacts and

click the **Delete** icon  on the action bar.

**Step 2:** Click **Delete** on the confirmation message form to delete the selected contact(s) or click **Cancel** to quit.




*You can also delete an address book from Collaboration Mail.*

## 2.3.4 Copy/paste a contact

You can copy one or more contacts to another address book:

**The 1<sup>st</sup> way:** Right click on a contact/an address book and select **Copy** in the drop list menu:

**The 2<sup>nd</sup> way:** Select the contacts that you want to copy by selecting check-box in the first column, and then click the **Copy** icon  on the action bar.

**The 3<sup>rd</sup> way:**

**Step 1:** Right click on an address book which has one or more contacts and select **Copy** in the menu.

**Step 2:** Select a destination address book for coping your selected contacts by right - clicking on the destination address book and select **Paste** in the drop-down menu.



*You can copy contacts of all address books but you can only paste contacts into personal and shared address books (if you have edit permission).*

## 2.3.5 Move a contact

This function allows you to move one or more contacts from one address book to another one.

- ✓ To move a contact, do as follows:

Select **Move** function by two ways:

**The 1<sup>st</sup> way:** Right click on a contact and select **Move** in the drop-down menu

**The 2<sup>nd</sup> way:** Select contact you want to move by selecting check-box in the first

column then click the **Move** button



on the action bar.

The **Move contact** form will appear:

**Illustration 15: The Move Contact form**

Move contacts by right clicking on the destination address book which you want the contact is moved to. After moving successfully, the form will be automatically closed.

You also can click **Cancel** to exit the form without moving.

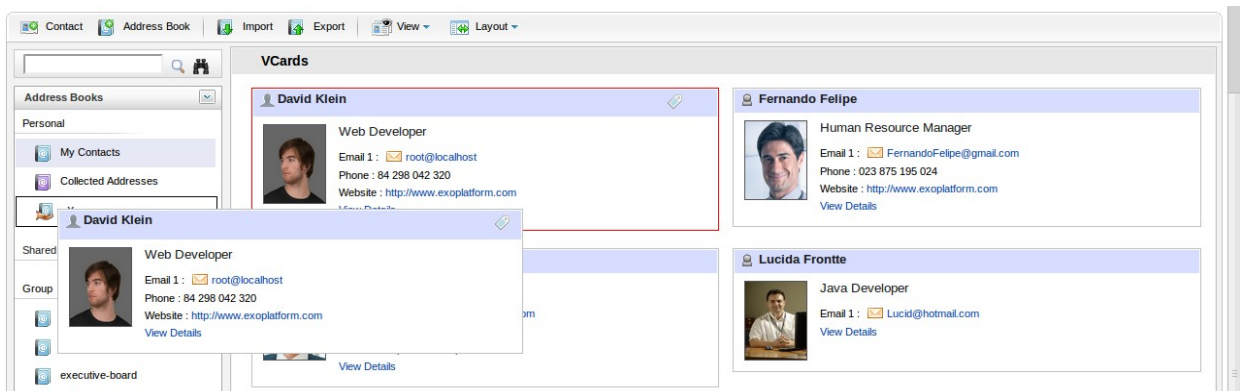
**The 3<sup>rd</sup> way:** Move contacts by using drag and drop feature. You can drag and drop one or more contacts at the same time.



*You can only move contacts of personal or shared address book if you have the edit permission. You cannot move default contact or contacts in the address book which you do not have edit permission and contacts in public address book.*

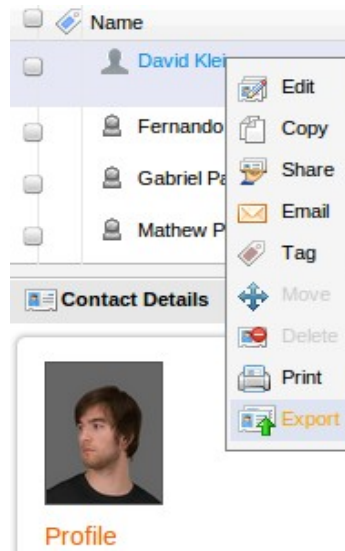
## 2.3.6 Export contacts

This function allows you to export one or more contacts into a file to be used in another application.



✓ To export a contact, do as follows:

**Step 1:** Right click on one contact in the contact list or click on a specific address book name then select the **Export** item in the menu:



The **Export Contacts** form will appear:

A screenshot of the 'Export Contacts' form. The form has a title bar 'Export Contacts' with a close button. Inside, it shows 'Address book : My Contacts'. Below this is a table with columns 'Name' and 'Email'. The table contains three rows of contacts, each with a checked checkbox in the first column. Below the table, there is a 'Total pages: 1' label and navigation buttons. There is a 'Name' input field with an asterisk. Below that is an 'Export format' dropdown menu set to 'x-vcard'. At the bottom are three buttons: 'Export all', 'Export only selected', and 'Cancel'.

Illustration 16: The Export Contacts form

**Step 2:** Select the contact which you want to export by selecting its check box.

**Step 3:** Enter a file name and select the export format.

**Step 4:** Click **Export all** to export all contacts in all pages or click the **Export only selected** button to export selected contacts.


## 2.3.7 Import contacts

This function allows you to import one or more contacts from your computer to a selected address book in Collaboration Address Book.

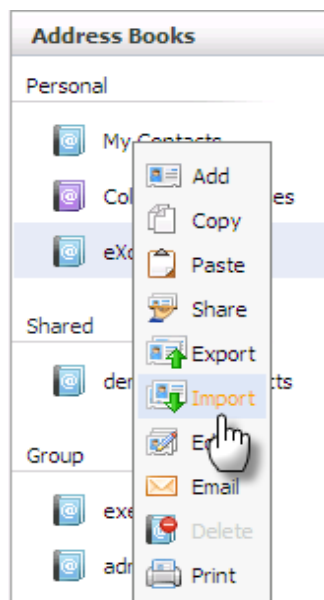
- ✓ **To import contacts, do as follows:**

**Step 1:** Select the **Import** function. There are by 3 ways to do this step:

**The 1<sup>st</sup> way:** Click  **Import** on the main tool bar.

**The 2<sup>nd</sup> way:** Click the icon  on the navigation panel and then select **Import** in the menu.

**The 3<sup>rd</sup> way:** Right click on a personal or shared address book which you have edit permission and select **Import** in the drop-down menu:



The **Import contact** form will appear:

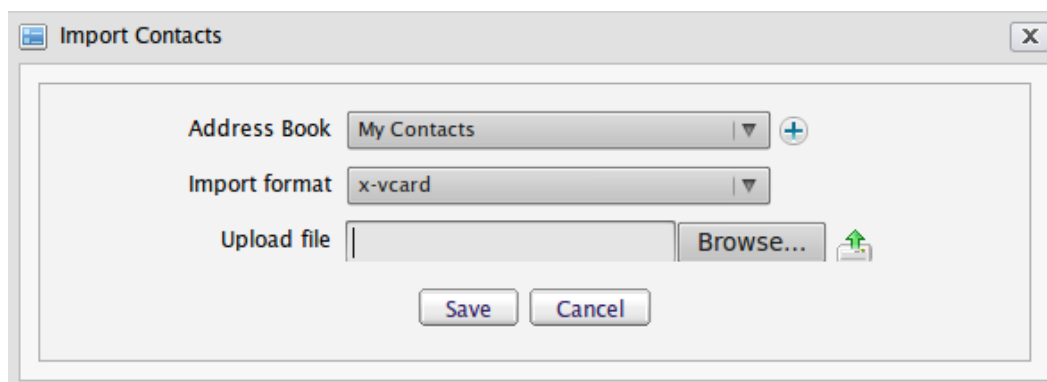


A screenshot of the 'Import Contacts' dialog box. It has a title bar with a close button. Inside, there are three main sections: 'Address Book' with a dropdown menu set to 'My Contacts' and a plus icon; 'Import format' with a dropdown menu set to 'x-vcard'; and 'Upload file' with a text input field, a 'Browse...' button, and a file upload icon. At the bottom, there are 'Save' and 'Cancel' buttons.

Illustration 17: The Import Contacts form

**Step 2:** Select an address book that you want to import contacts to. You can also quickly

create new address book by clicking 

**Step 3:** Select the file format in the **Import format** field.

**Step 4:** Browse to the contact file in your computer and click the **Upload** icon  next to the **Browse...** button to upload the selected file.

**Step 5:** Click the **Save** to accept importing contacts in the selected file or click **Cancel** to quit.



*You can only import contacts to personal or shares address books if you have edit permission.*

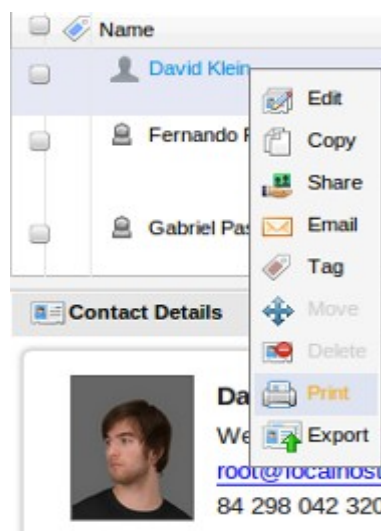
## 2.3.8 Print contacts

Print function allows you to print information of the selected contacts. You can print one or more contacts at the same time.


- ✓ To print one contact, do as follows:

**The 1<sup>st</sup> way:**

**Step 1:** Right click directly on a contact in the contact list and select **Print** in the drop-down menu:



The single contact print preview will appears with the detailed information:

	<b>David Klein</b> Web Developer root@localhost 84 298 042 320 (work)	27 years old, Male Also known as Dein	IM DavidKlein (eXo Chat) Phone 0320 024 383 304 (work) 89 847 933 094 (home)
<b>Work</b> 18/11 eXo Street - 99 - eXo Platform Thai Ha - France 84 298 042 320 (Phone) 0320 024 383 304 (Phone) 001 897 956 237 (Fax) http://www.exoplatform.com		<b>Home</b> 18/11 A3 eXo Platform SAS - 99 - eXo Platform Fr France 89 847 933 094 (Phone) http://www.blog.exoplatform.org	
<b>Note</b>			

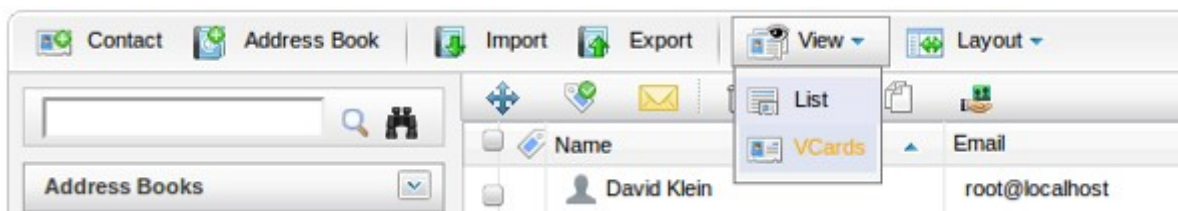
Print Cancel

Illustration 18: The Single contact print preview

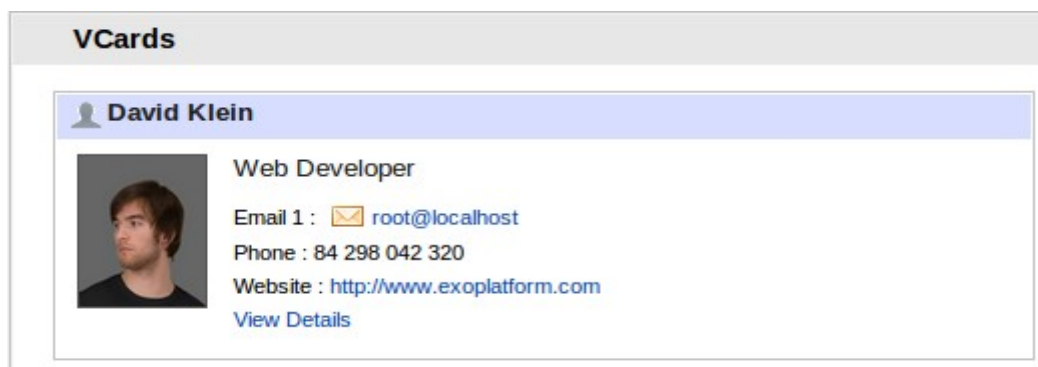
**Step 2:** Click the **Print** button to continue printing or click the **Close** button to quit the Contact print preview form.

**The 2<sup>nd</sup> way:**

**Step 1:** Click **View** in the main menu, and then select Vcard like below:



The contacts will be displayed in the Vcard view:



**Step 2:** Click **View Details** to open the contact in detail pop up. The pop up is shown with **Print Preview** button that allows you to view and print the contact like the 1<sup>st</sup> way.

✓ **To Print multi-contacts:**

**Step 1:** Select contact(s) you want to print by selecting its corresponding check box(s) ,

and then click the **Print** icon  on the action bar:



The multiple contacts print preview will appear with summary information:



**Step 2:** Click the **Print** to print selected contact(s) or the **Cancel** to quit without printing.

## 2.3.9 Share contacts

This function allows you to share contact(s) with one or more users, groups. The shared user/group(s) may have view permission or edit permission on the shared contacts.

- **View permission** allows other users to view, copy, export, print, move and delete but cannot delete your shared contacts. The shared users cannot make changes on the information of the shared contacts if they have view permission only. However, they can move and delete shared contacts.
- **Edit permission** allows other users to view, copy, export, print, move and delete and also edit the shared contacts.

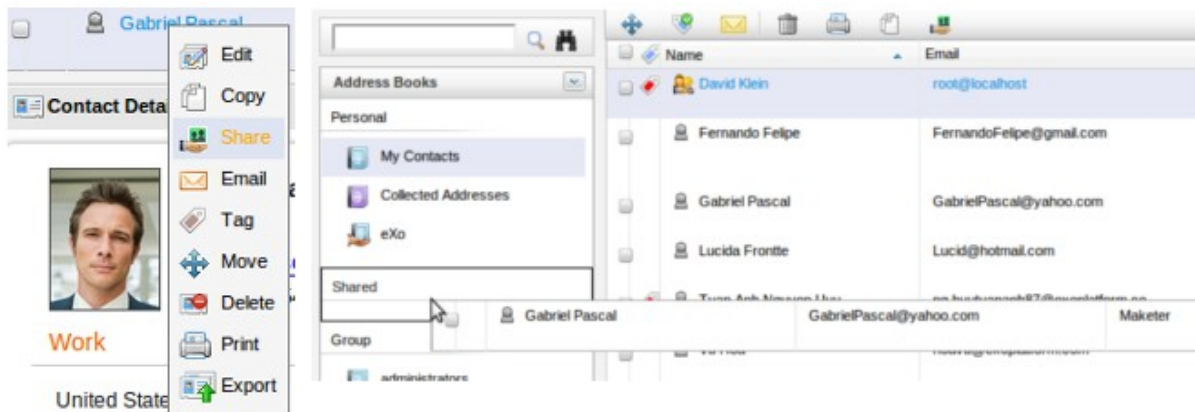


*The shared users can move or delete the shared contacts from their Address Book only. The original shared contact still exists in the other shared user's contact view. The shared contact is only deleted completely and no longer sharing with all shared if the creator/author of the shared contact removes it.*


- ✓ **To share contact with other users, do as follows:**

**Step 1:** Right click on one contact you want to share and select **Share** in the menu or drag and drop this contact to **Shared Address** book in the **Address Book** panel:





The **Share contact to other users** form will appear:

**Step 2:** In the **Share contact to other users** form, click the **select user** icon  to open the **User Selector** form:

	User Name	First Name	Last Name	Email
<input type="checkbox"/>	demo	Demo	gtn	demo@localhost
<input type="checkbox"/>	john	John	Anthony	john@localhost
<input type="checkbox"/>	mary	Mary	Kelly	mary@localhost
<input type="checkbox"/>	root	Root	Root	root@localhost


Illustration 19: User selector form

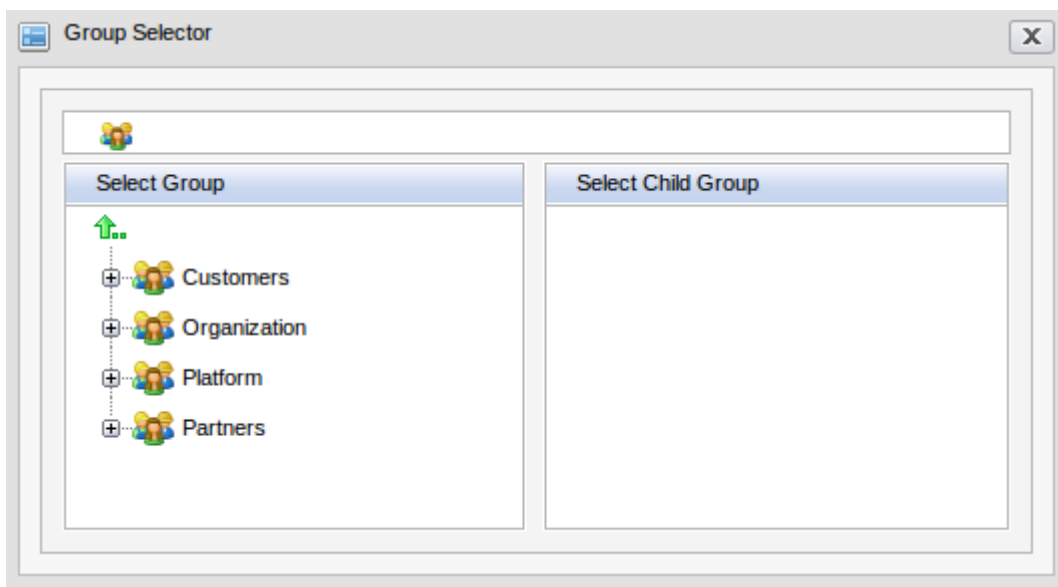
**Step 3:** Select user by selecting its check box then click **Add**.

Select the 'Can edit?' check box if you want to grant edit permission. User in Group having edit permission can view export, import, add, edit and delete the shared contact while the others do not have edit permission can view and export only.

Click **Save** to share your contact(s) with selected user(s).

- ✓ To share a contact with groups:

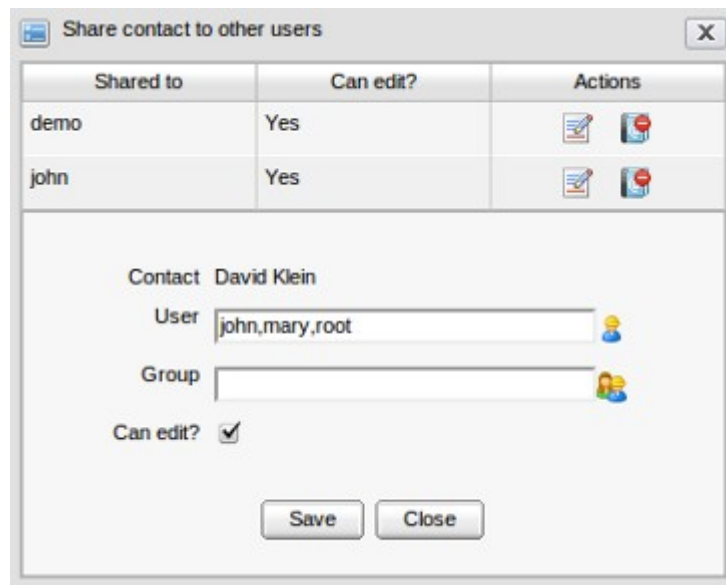
**Step 1:** In the **Share contact** form: click the **select group** icon  by **Group** field.  
The **Group Selector** form will appear:



**Step 2:** Select the group path from the left panel. The group corresponding with the path will be shown at the right panel and available for selecting. The selected group will be displayed in the Group field.

**Step 3:** Click **Save** to accept sharing with the selected users or click **Cancel** to quit.

After sharing, the shared users/groups will be updated into the Share table in the **Share Address book to other users** form :



In the **Actions** column, you can click the icon to change the 'Can edit' right of specific user/group(s) or click the icon to remove specific user/group from the **Share** table. If you want to delete specific user/group, click on the delete icon corresponding to it and click **OK** on the delete confirmation message.

## 2.3.10 Send mail to a contact

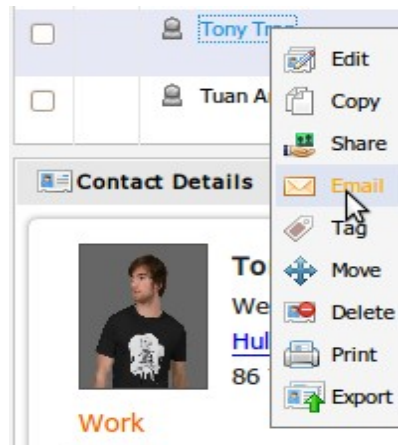
This function allows you to send a mail directly to one or more contacts in your address book. To take this action, you firstly need to:


1. Add at least one account in Collaboration Mail.
2. Have the email address of the contact which you want to send mail.
3. Email address of the selected account will be used to send mail to a contact.

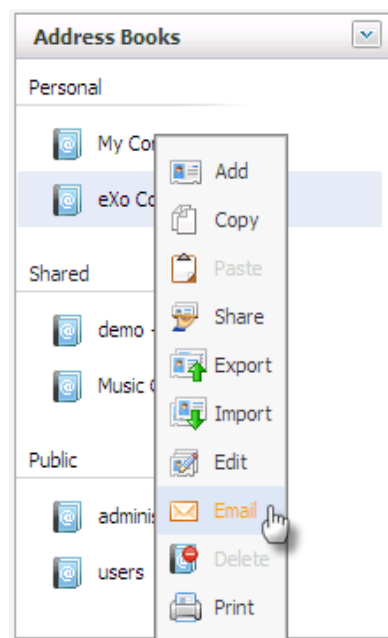
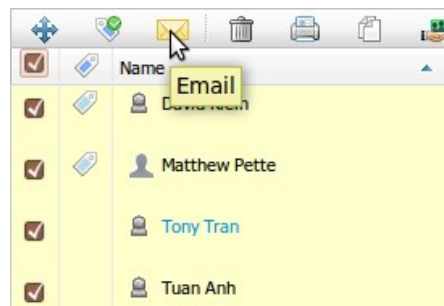
✓ **To send mail to a contact:**

**Step 1:** Select the **Email** function. You can do this steps in different ways:

**The 1<sup>st</sup> way:** Right click on the contact which you want to send a mail to and select **Email** in the drop-down menu:



**The 2<sup>nd</sup> way:** Select the contact(s) that you want to send mail by selecting its check box(s) in the first column, and then click the **Email** icon  on the action bar:



**The 3<sup>rd</sup> way:** Right click on the address book and select **Email** in the menu:

**The 4<sup>th</sup> way:** Click on email address of a contact when viewing contact in details.

After selecting the Email function, the **Send mail** form will appear:

Illustration 20: The Send mail form

**Step 2:** Input the receivers' email address.

Besides, the auto complete contacts function allows filtering and listing the receive email address according to your alphabet input.

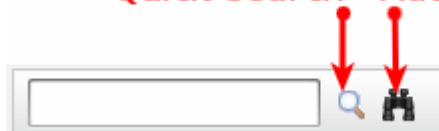
Illustration 21: The auto complete feature

**Step 3:** Input the subject and the message content.

**Step 4:** Click the **Send Mail** button to send your message to the selected contacts.

### 2.3.11 Search contacts

The search contact function allows finding contacts easily and quickly. There are two search



types: **Quick search** and **Advanced search**.

### 2.3.11.1 Quick search

This function allows you to do a quick search with specific keyword in all your contacts. All contacts having text matching with your search term will be displayed in the **Search Result** dialog.

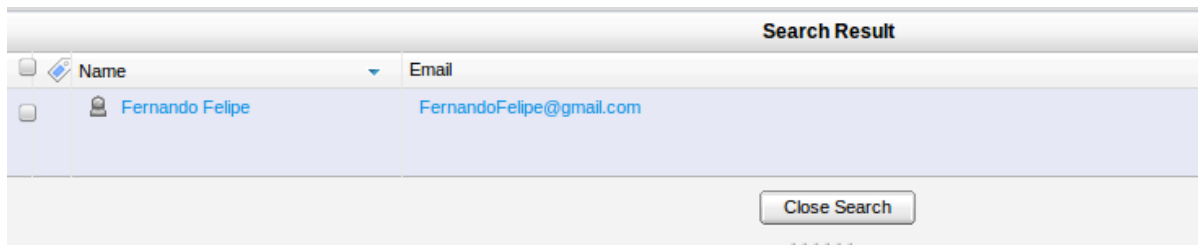
Do as follows:

**Step 1:** Enter the search term in the **Search** box :



**Step 2:** Click the **Search** icon 

The search result(s) will be displayed in the right panel:



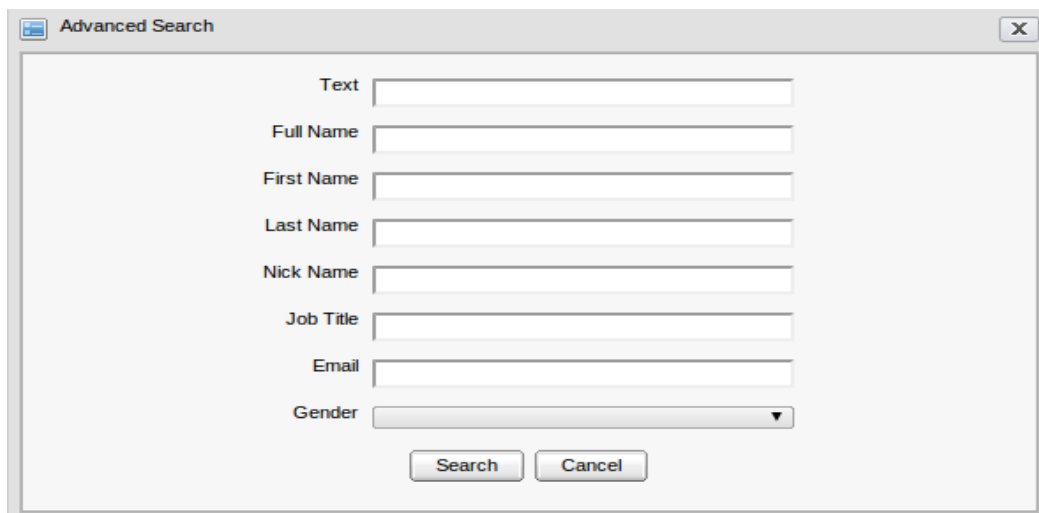
Name	Email
Fernando Felipe	FernandoFelipe@gmail.com

### 2.3.11.2 Advanced search

When you want to refine your search further, you can use the Advanced Search. This function allows you to conduct a search using a variety of criteria and enables you to limit the search results.

**Step 1:** Click the **Advanced Search** icon  next to the search box.

The **Advanced Search** form will appear:



Advanced Search

Text

Full Name

First Name

Last Name

Nick Name

Job Title

Email

Gender

Search Cancel

Illustration 22: The Advance Search form

In this form, you can set the search criteria by :

- Simple text
- Full name
- First Name
- Last name
- Nick Name
- Job title
- Email
- Gender

**Step 2:** Define your search criteria

**Step 3:** Click the Search button to do search. All contacts which satisfy your criteria will be shown in the **Search Result** dialog.

## 2.4 Tag

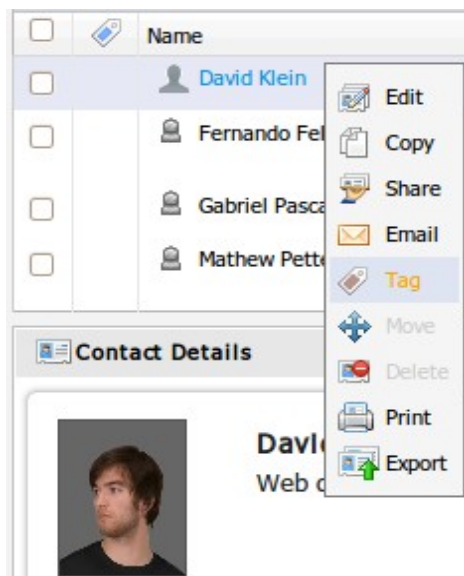
Collaboration Address Book allows assigning tags to specific contacts. Tags are used as labels which help you filter or categorize your contacts from different address books. A single contact can be assigned to many tags at a time.


### 2.4.1 Tag a contact

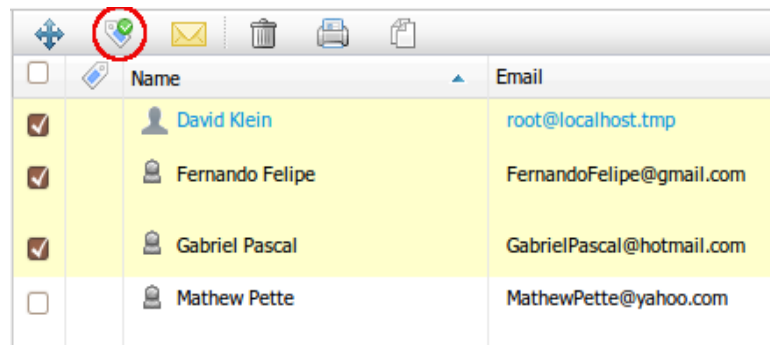
✓ **To tag a contact:**

Open the Add/Remove Tag by one of following ways:

**The 1<sup>st</sup> way:** Right click on the contact which you want to tag and select **Tag** in the drop-down menu.

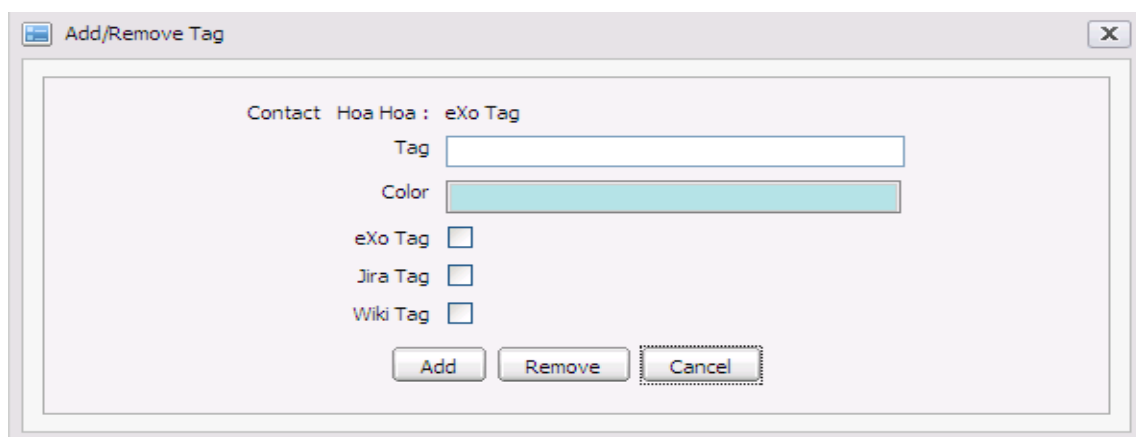


**The 2<sup>nd</sup> way:** Select the contact you want to tag by selecting its corresponding check box, then click the **Tag** icon  on the action bar:



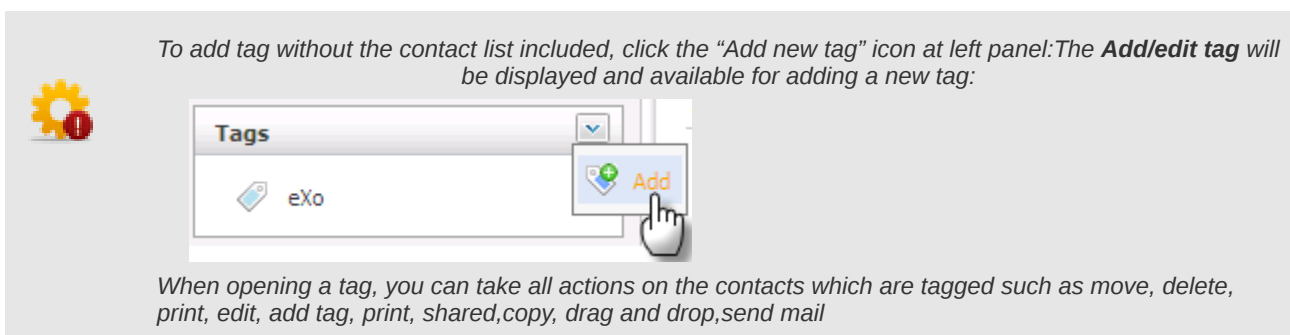
	Name	Email
<input checked="" type="checkbox"/>	David Klein	root@localhost.tmp
<input checked="" type="checkbox"/>	Fernando Felipe	FernandoFelipe@gmail.com
<input checked="" type="checkbox"/>	Gabriel Pascal	GabrielPascal@hotmail.com
<input type="checkbox"/>	Mathew Pette	MathewPette@yahoo.com

The 3<sup>rd</sup> way: Drag and drop contacts to specific tag in the Tag list in the left panel.  
The **Add/Remove Tag** form will appear:



Contact Hoa Hoa : eXo Tag  
 Tag   
 Color   
 eXo Tag ☐  
 Jira Tag ☐  
 Wiki Tag ☐  
 Add Remove Cancel

In the Add/remove Tag you can add new tag, remove assigned tags or assign new tag to contact.



To add tag without the contact list included, click the "Add new tag" icon at left panel: The **Add/edit tag** will be displayed and available for adding a new tag:

When opening a tag, you can take all actions on the contacts which are tagged such as move, delete, print, edit, add tag, print, shared, copy, drag and drop, send mail

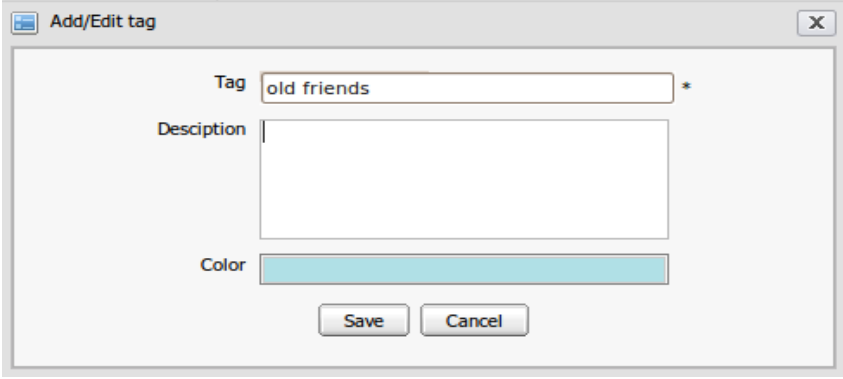
## 2.4.2 Edit a tag

- ✓ To edit a tag, do as follows:

**Step 1:** Right click on a tag in tag space and select the **Edit** item in the menu.

The **Edit tag** form will appear:



A dialog box titled "Add/Edit tag" with a close button (X) in the top right corner. It contains three input fields: "Tag" with the text "old friends" and an asterisk, "Description" which is empty, and "Color" which shows a light blue color swatch. At the bottom are "Save" and "Cancel" buttons.

**Step 2:** Make changes to the tag.

**Step 3:** Click **Save** to accept changes or **Cancel** to quit.

### 2.4.3 Delete a tag

- ✓ To delete a tag, do as follows:

**Step 1:** Right click on tag name in tag space and select **Delete** item in the menu

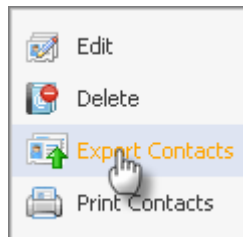
**Step 2:** Click **OK** in the confirmation message to accept deleting tag or click **Cancel** to quit.

### 2.4.4 Export contacts having a same tag

This function allows exporting contacts that have same tags into a file that can be used in other address book applications

- ✓ To export contact in tag, do as follows:

**Step 1:** Right click on a tag and select **Export contact** in the drop-down menu:



The **Export Contacts** form will appear:

	Name	Email
<input type="checkbox"/>	David Klein	DKlien@hotmail.com
<input type="checkbox"/>	Matthew Pette	mattpett@localhost

Total pages: 1

Name  \*

Export format: x-vcard

Export all Export only selected Cancel

**Step 2:** Select contacts that you want to export by selecting corresponding check boxes

**Step 3:** Enter a file name for the **Name** field and select the export format

**Step 4:** Click **OK** to accept exporting or click **Cancel** to exit the form.

A download pop-up window will appear. Depend on what browser you are using, this window may display differently.

## 2.4.5 Print contacts having same tag

This function allows printing all contacts which have same tag. You can chose contacts in specific tag to be printed.

✓ **To print contacts in one tag, do as follows:**

**Step 1:** Right click on a tag assigned to contacts that you want to print and select **Print contacts** in the drop-down menu. The contact print preview form appears with detailed contact information.

**Step 2:** Click the **Print** button to continue printing or the **Close** button to exit the Contact print view form.

## 3 Collaboration Calendar

### 3.1 Get started

#### 3.1.1 What is Collaboration Calendar?

The Calendar portlet of eXo Collaboration is a robust web based agenda. This application allows you to schedule appointments and meetings, establish recurring activities, create multiple calendars as well as share calendars with others. With Collaboration Calendar, it is easy to keep track of all important events/tasks and collaborate with others – all in one place.

#### 3.1.2 What you can do with Collaboration Calendar?

Collaboration Calendar is simple to use but offers wide range of features:

- ✓ Create multiple personal calendars, manage calendar easily with calendar groups.
- ✓ Quickly create an event or a task.
- ✓ Create events and tasks in details, classify events with event categories easily.
- ✓ Create all-day events.
- ✓ View other attendees' availability schedules.
- ✓ Create recurring events easily.
- ✓ Get reminders via email .
- ✓ Share calendars with others.
- ✓ Import/Export calendars.
- ✓ Publish your calendars with RSS, CalDAV.

### 3.1.3 Access to Calendar portlet

When you had an account, you can access to Calendar portlet and use all its feature. To access to

Calendar, you can click on Calendar icon  right from the Chat bar:



or you can go to your Space and click on Calendar portlet:



### 3.1.4 Calendar interface

Calendar interface has six basic components:

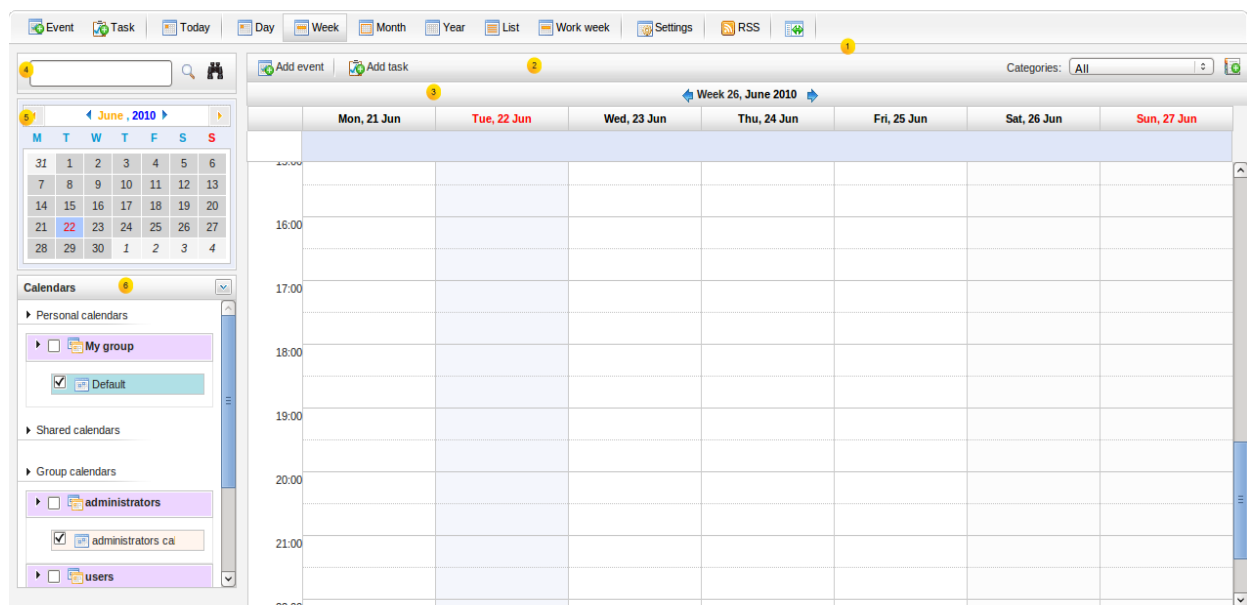









Illustration 23: The main screen of Calendar portlet

Details:

Indicator	Meaning
	The <b>Tool bar</b> where you can find the most used actions in Calendar: Add Event/Task, change view mode, etc
	The <b>Action bar</b> that allows adding more detail events/tasks and adding new categories
	The <b>Calendar view panel</b> that displays all event/task(s) in the selected calendar at the current time.
	The <b>Search Panel</b> that allows searching event/task in calendar.
	The <b>Mini Calendar</b> that allows quickly viewing event/task in the selected day. You can chose to show or hide this Mini Calendar
	The <b>Calendar list</b> that shows the personal calendar, shared calendar and group calendar.



*In Platform, by default, the left panel of Calendar is hidden. To show this panel, click  on the tool bar and select **Toggle Left Panel**.*


## 3.2 Manage Calendar Groups

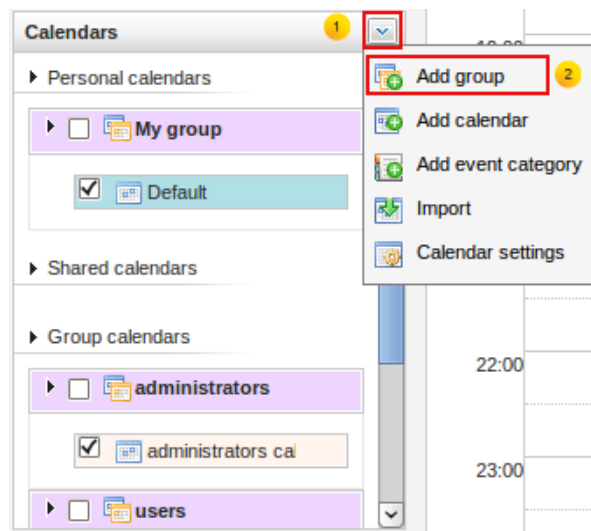
The calendar groups allows you to categorize your calendar types easily. One calendar group may contain one or more calendars added by yourself. By default, Calendar provides a group in Personal calendars category named 'My group'.

### 3.2.1 Add a new calendar group

This function allows adding new calendar groups in Calendar which allows organizing and personalizing calendars in your own way.

✓ **To add a new calendar group, do as follows:**

**Step 1:** Click the **Calendar Options** icon  at the right of the calendar list panel to open the menu then select **Add group** in the menu:



The **Calendar groups** form will appear:

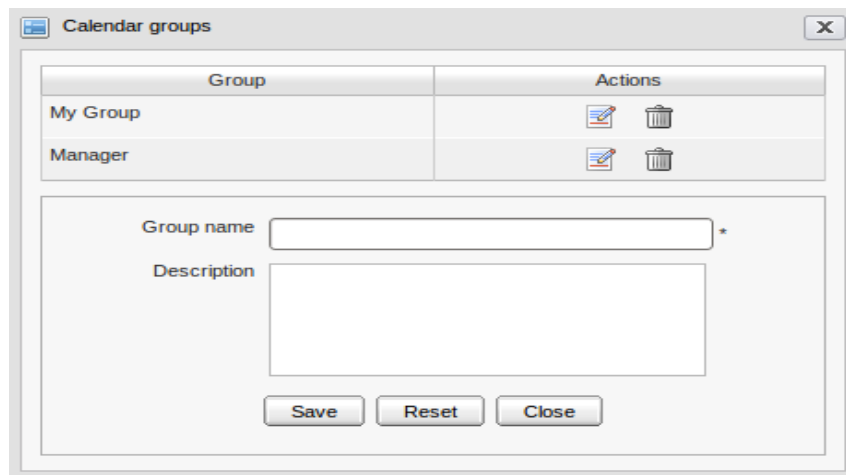
The 'Calendar groups' form is a window with a title bar. It contains a table with two columns: 'Group' and 'Actions'. The first row shows 'My group' with edit and delete icons. Below the table, there are two input fields: 'Group name' with the value 'Manager' and an asterisk, and 'Description' with the value 'Manager's calendar'. At the bottom are three buttons: 'Save', 'Reset', and 'Close'.

Illustration 24: The Calendar groups form

**Step 2:** Input values in the form.

**Step 3:** Complete adding a new calendar group by clicking **Save**.

After creating a new calendar group, the new created group will appear in the calendar list of the **Calendar groups** form. The **Calendar groups** form lists all the group that you can be directly edited or deleted.



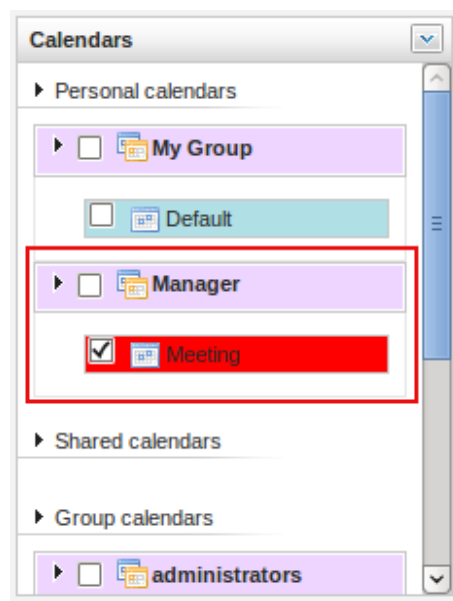
Group	Actions
My Group	
Manager	

Group name  \*

Description

Illustration 25: The Calendar Groups form

Empty calendar groups that do not have any calendars inside it, are not displayed under the **Personal Calendars**, but when they are added a calendar, they will be displayed as the illustration below with the group "Manager".



*In eXo Social , after you create a Space for a group, a Group Calendar with the same name with your group Space will be created automatically. Notice that this is for Platform only.*


### 3.2.2 Edit a calendar group

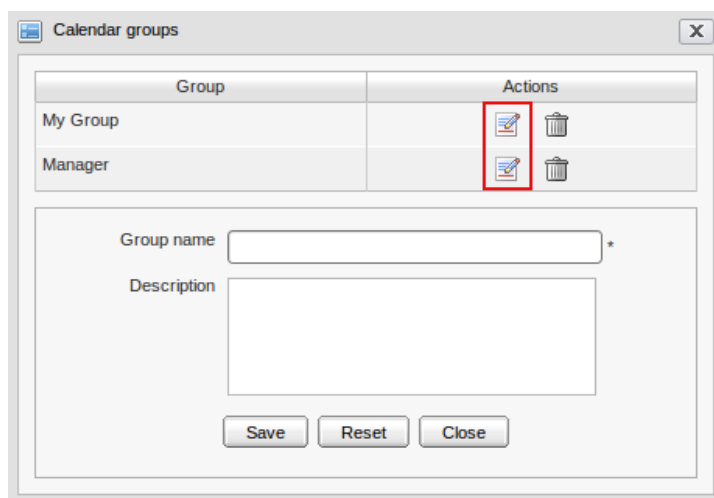
This function lets you change the name and the description of a selected group.

- ✓ To edit a calendar group, do as follows:

**Step 1:** Open the **Calendar groups** form by one of following ways:

- **The 1<sup>st</sup> way:** Do the same as adding a new calendar group to open the **Calendar**

**Groups** form → click the **Edit** icon  corresponding to the group that you want to edit.

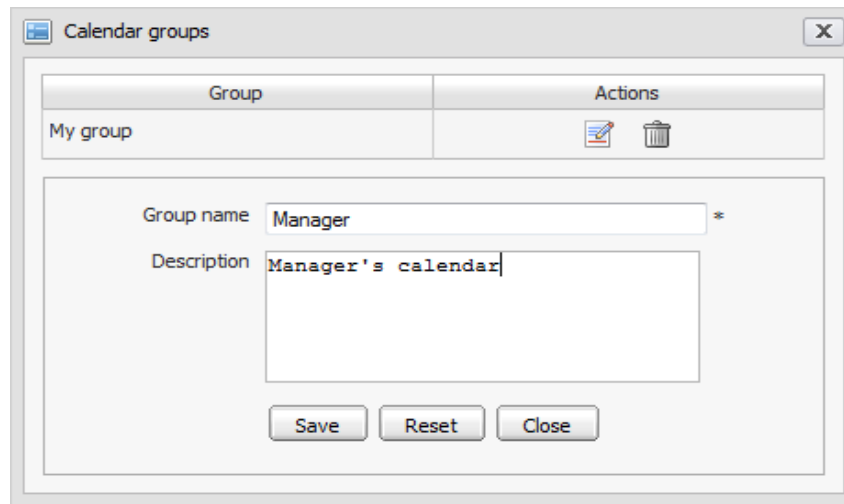




- **The 2nd way:** Right-click on the group name which you want to edit and select **Edit** in the drop-down menu:



The **Calendar groups** form will appear:





Group	Actions
My group	 


Group name  \*

Description

**Step 2:** Type group name and description for the calendar group.

**Step 3:** Complete editing the calendar group by clicking **Save**.




When adding a new calendar to a calendar group, you can also add new a calendar group by clicking the icon  that corresponds to **Group** fields.

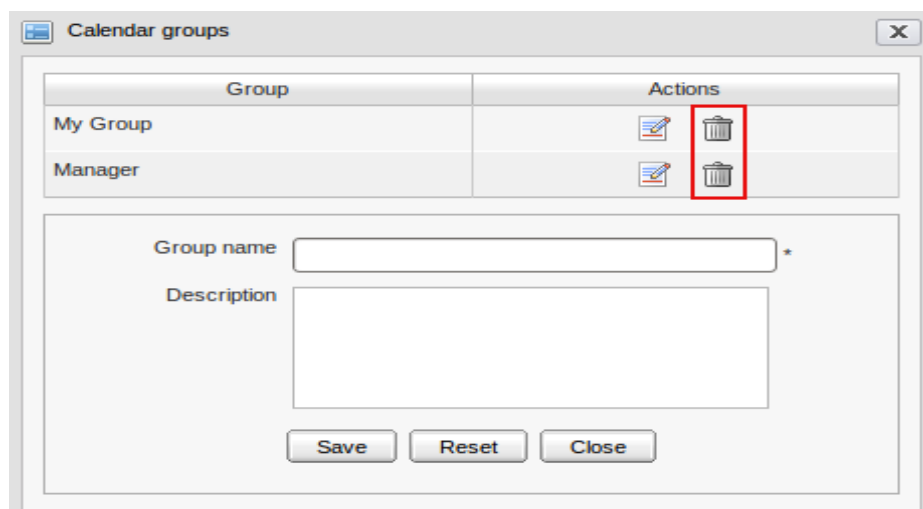
### 3.2.3 Delete a calendar group





This function allows removing calendar groups. When a calendar group is deleted, all calendars inside it are also deleted.

✓ **To delete a calendar group, do as follows:**

**Step 1:** Open the **Calendar groups** form.

**The 1<sup>st</sup> way:** Do the same as adding a new calendar group to open the **Calendar Groups** form . Click the **Delete group** icon  corresponding to the group that you want to delete.

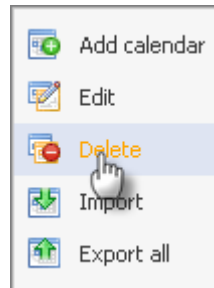


Group	Actions
My Group	 
Manager	 

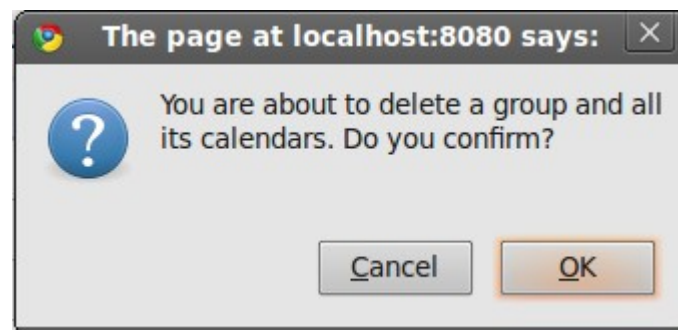
Group name

Description

**The 2nd way:** Right-click on the name of the group which you want to delete and select **Delete** in the drop-down menu:




The confirmation message will appear :



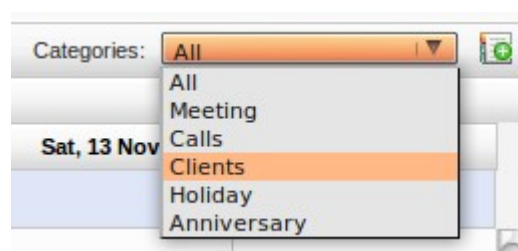
**Step 2:** Click **OK** to accept deleting the group or click **Cancel** to quit without deleting. The selected calendar group will be removed from the **Group** table. Besides, the deleted group and all its calendars will not be displayed in the calendar list panel.



When adding a new calendar to a calendar group, you can also add new a calendar group by clicking the  icon that corresponds to **Group** fields.

## 3.3 Manage Categories


Categories are used to classify events and tasks. For example, you could use a 'Meeting' category for all meetings with your colleagues or customers in your company. By default, Calendar provides 5 available categories: Calls, Meeting, Holiday, Clients, Anniversary. You can add and view events/tasks in default categories. In addition, you also can edit, delete default categories or create new categories by yourself.

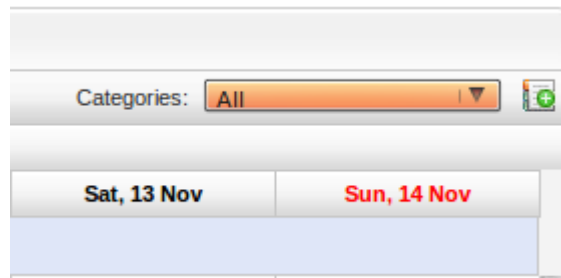


### 3.3.1 Add a new category

This function is used to create new categories in Calendar.

To create new categories, do as follows:

**Step 1:** Click the  icon at the right corner of the action bar:



The **Event categories** form will appear :

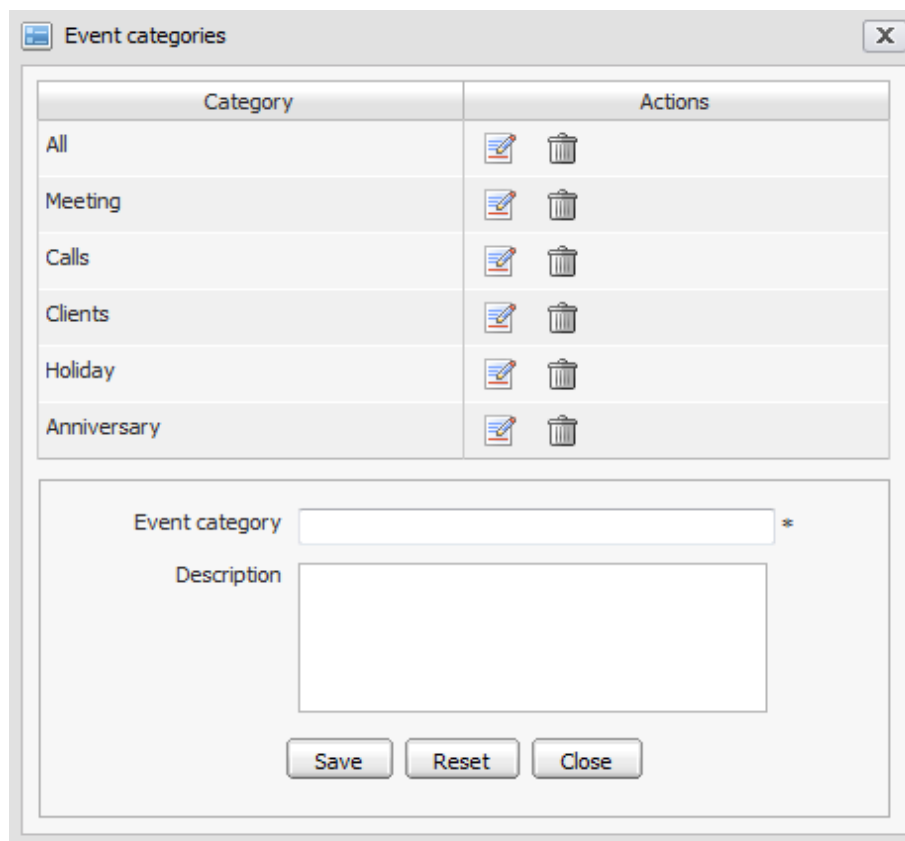


A screenshot of a window titled 'Event categories'. It contains a table with two columns: 'Category' and 'Actions'. The table lists six categories: 'All', 'Meeting', 'Calls', 'Clients', 'Holiday', and 'Anniversary'. Each category has two action icons: a pencil (edit) and a trash can (delete). Below the table is a form with two fields: 'Event category' (a text input field with an asterisk) and 'Description' (a larger text area). At the bottom of the form are three buttons: 'Save', 'Reset', and 'Close'.

Illustration 26: The Event categories form

**Details:**

<b>Event category</b>	The name of the category. This name will appear in the category list.
<b>Description</b>	The description of the category. This description only appears when you edit the category in this form.
<b>Save button</b>	To accept saving a new category.
<b>Reset button</b>	To set blank entry for all inputted fields.
<b>Close button</b>	To exit the <b>Event categories</b> form without adding new.
	This button is used to edit a category corresponding to it.
	This button is used to delete a category corresponding to it.

**Step 2:** Enter category name and its description then click **Save** to finish.


The new created category will appear in the category list box.

### 3.3.2 Edit/Delete a category

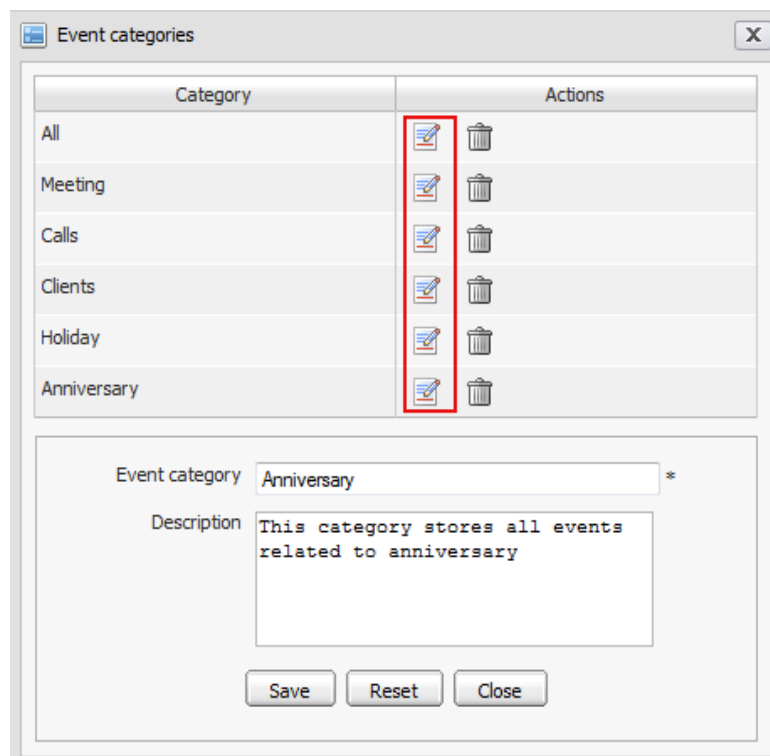
This function allows changing name and description of a selected category.

✓ **To edit/delete a category, do as follows:**


**Step 1:** Click the  icon in the action bar. The **Event categories** form will be displayed.

**Step 2:** Click the **Edit** icon  corresponding to the category that you want to edit.

The properties of the selected calendar group will be shown.



**Step 3:** Make changes to the category then complete editing by clicking **Save** to complete .

Click the  icon if you want to delete category. The deleted category will be removed from the **Category** table in the form and the categories list box.

## 3.4 Manage Calendars


After being created, a calendar will be categorized in the group of your choice. It can be added tasks/events, edited, deleted, exported and shared with the other users. There are three types of calendar: personal calendars, shared calendars and group calendars.

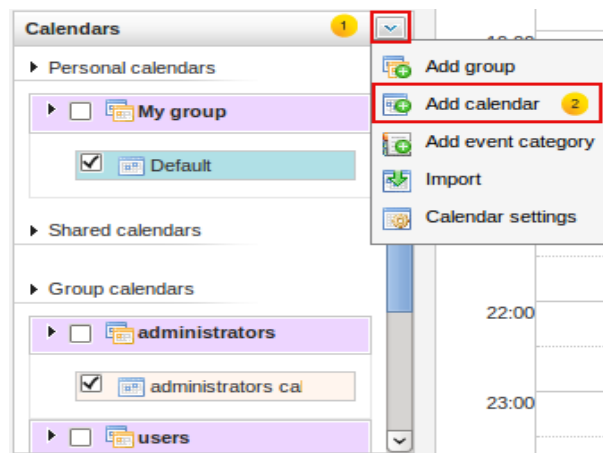
### 3.4.1 Add a new calendar

This function allows adding new calendars. All created calendars will be listed under the **Personal calendars** category on the left navigation panel.

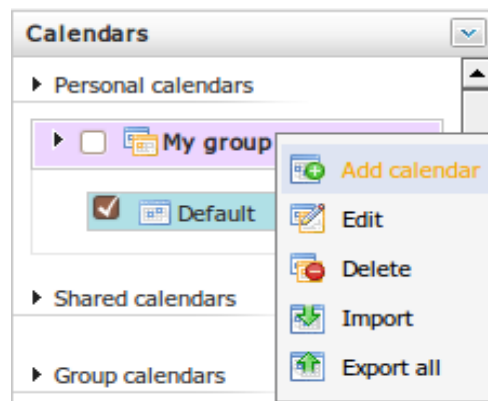
- ✓ **To create a new calendar, do as follows:**

**Step 1:** Open the **Calendar** form. You can do this step in 3 different ways:

**The 1<sup>st</sup> way:** Click the **Calendar Options**  icon at the top right of the calendar list and then select the **Add calendar** item in the drop-down menu:



**The 2<sup>nd</sup> way:** Right-click on the name of the calendar group which exists in the list of **Personal Calendars** and then select **Add calendar** in the drop-down menu:




The **Calendar** form will appear:

Illustration 28: The Calendar details tab of the Calendar form

Details:

■ The **Calendar details** tab:

<b>Display name</b>	The name of the calendar. This field is required
<b>Description</b>	The brief description of the calendar
<b>Groups</b>	The group contains your calendar. The group can be chosen in the existing group list or quickly add a new group by clicking the  icon at the right Groups combo box. The <b>Calendar group</b> form that allows adding a new group directly in the <b>Calendar</b> form will be displayed.
<b>Country(Language)</b>	The location for the calendar
<b>Time zone</b>	The displayed time zone for the calendar activities. You can

	personalize your calendar time zone.
<b>Color</b>	The displayed color for the calendar activities. You can personalize it.
<b>Save button</b>	To accept saving a new calendar

■ The **Groups** tab:

The screenshot shows a window titled 'Calendar' with a close button (X) in the top right. Inside, there are two tabs: 'Calendar details' and 'Groups'. The 'Groups' tab is active. It contains a table with three rows of group information:

Group	Show in groups	Editable by
/platform/administrators	<input type="checkbox"/>	[Text Field] [User Icons]
/platform/users	<input type="checkbox"/>	[Text Field] [User Icons]
/organization/management /executive-board	<input type="checkbox"/>	[Text Field] [User Icons]


At the bottom of the form are three buttons: 'Save', 'Reset', and 'Cancel'.

Illustration 29: The Groups tab of the Calendar form

The **Groups** tab allows sharing the calendar with the other groups/users.

To share a calendar, check the check box(es) corresponding to a group(s) that you want to share. Users in the checked groups will be able to view this calendar. Besides, you can define who can edit the calendar in each group.

- ✓ To grant the edit permission to individual users in a group, follow these steps:

1. Click the  icon at the right of the **Edit permission** column.
2. Select a user in the group . For example: select **john** in the **administrators** group.

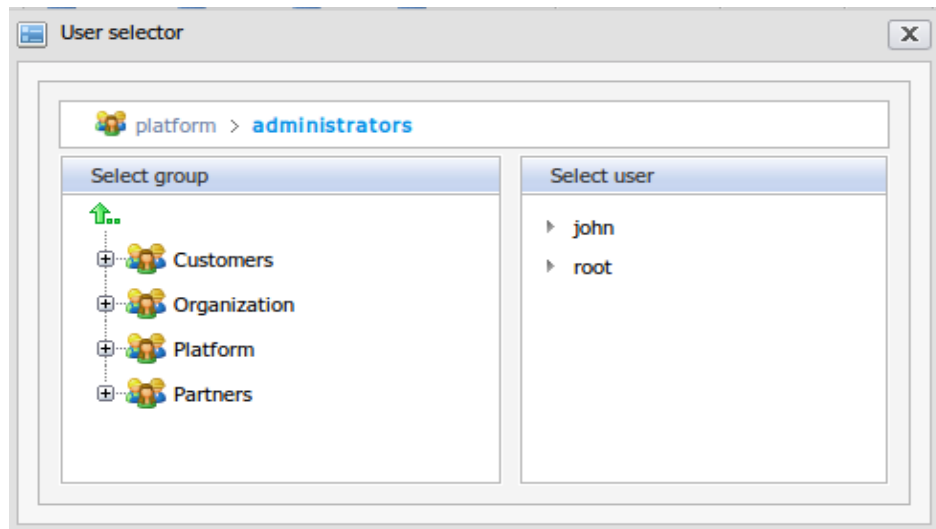



Illustration 30: The User selector form

- ✓ To grant the edit permission to a membership type in group, follow these steps:
1. Click the  icon at the right of Edit permission column.
  2. Select a membership in the group. For example: select the manager role in the administrators group.

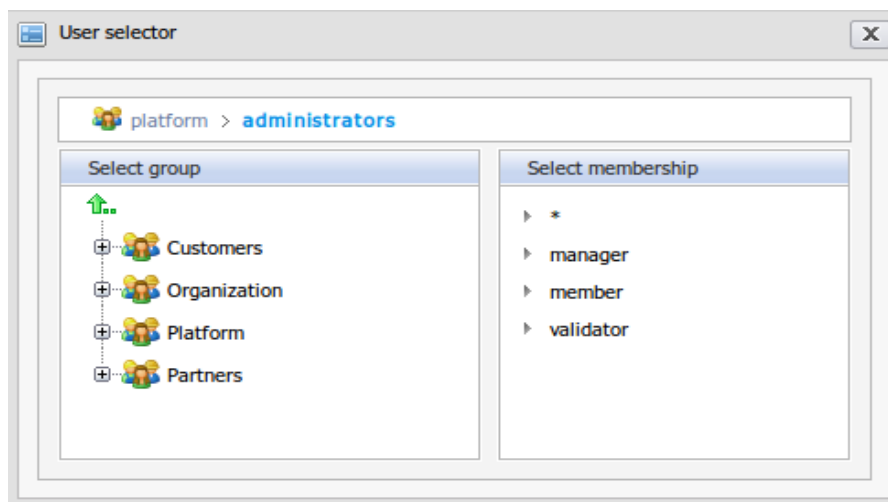


Illustration 31: The Select Membership in the User Selector form

**Step 3:** Enter values in the **Calendar** form.

**Step 4:** Complete adding a new calendar by clicking **Save**.

The new added calendar will appear in the calendar list.



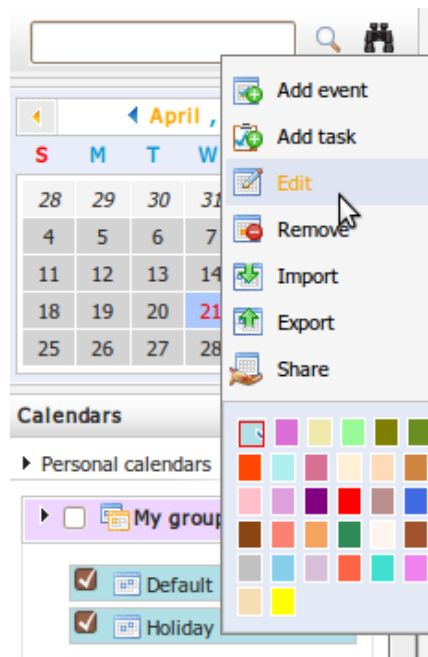


When you fill values in the Group tab, the calendar will appear in the Group calendars category. All members of the corresponding groups will be able to view that calendar. If you don't want your calendar to be a public one, leave the Group tab empty.

### 3.4.2 Edit a calendar

- ✓ To edit a calendar, do as follows:

**Step 1:** Right-click on the name of the calendar (e.g: Holiday) to open the drop-down menu and click **Edit**:



The **Calendar** form will appear with all current n formation, available for editing.

- With personal calendar: (this calendar is not shared with any one. When adding a new calendar, all the fields in the Groups tab are blank). There is only one tab. It is **Calendar details** tab:

Calendar

Calendar details

Display name  \*

Description

Groups  +

Country (Language)

Time zone

Color

Private URL

Public URL *This calendar is not public access. [Enable Public Access](#)*

Save Reset Cancel

Illustration 32: Calendar form

- With group calendar: (this calendar is shared with the users who belong to the shared group). There are 2 tabs: the **Calendar details** and the **Groups** tab:

Calendar

Calendar details Groups

Display name  \*

Description

Country (Language)

Time zone

Color

Private URL

Public URL *This calendar is not public access. [Enable Public Access](#)*

Save Reset Cancel

Illustration 33: The Calendar form

**Step 2:** Change the values in the **Calendar** form as you want.

**Step 3:** Complete editing the calendar by clicking **Save**.



You can edit any personal calendar. In addition, you can also edit a shared or group calendar when you have the edit permission on it. For instance, when you right click on the calendar's name that you do not have the edit permission, the **Edit** item will be disabled in the drop-down menu.

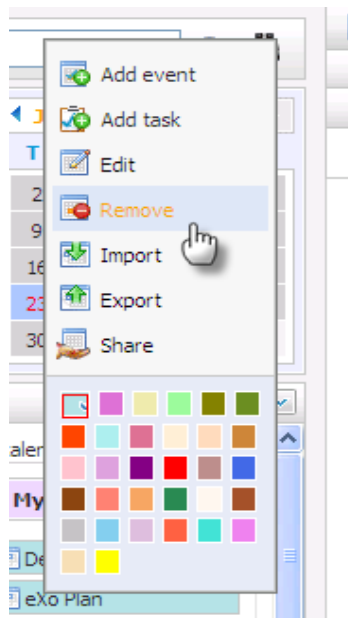
The Edit permission on a calendar allows you to add, edit or delete events/tasks which exist in that calendar.

### 3.4.3 Remove a calendar

This function allows removing a calendar and all events/tasks stored inside it.

- ✓ To remove a calendar, do as follows:

**Step 1:** Right-click on the name of the calendar to open the drop-down menu, then click **Remove**:



**Step 2:** Complete removing a calendar by clicking **OK** in the confirmation message.

The removed calendar will not be displayed in the calendars list panel. All events/tasks inside that calendar will also be removed.



If you do not have the edit permission on the shared calendar, removing a shared calendar means that you only remove it from your calendar list list. Other users can still work on it in their calendars list.

### 3.4.4 Share a calendar

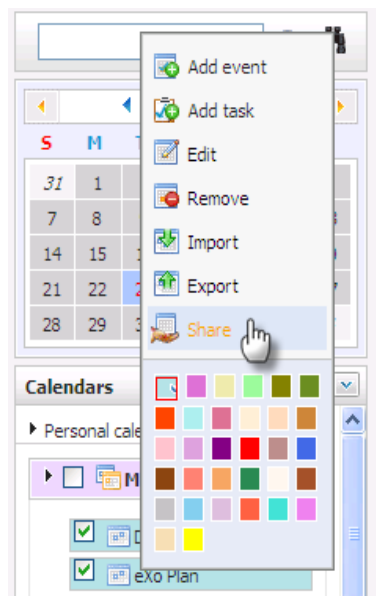
This function allows you to share your calendar with other users so that they can participate in all activities on these calendar.

The permissions in a shared calendar are set into two levels:

- **View permission:** allows you (shared user) to view a calendar and its events/tasks, but you cannot change any information. It means that you cannot add/edit/delete events/tasks; edit, import and export calendars.
- **Edit permission** allows you (shared user) to view, import and export a calendar or add, edit, delete events/tasks inside the shared calendar, export the shared calendar. However, you cannot edit it.

✓ **To share a calendar, do as follows:**

**Step 1:** Right click on the name of the calendar to open the drop-down menu, then select the **Share** item:



The **Share calendar** form will appear:


**Illustration 34: The Share calendar form**

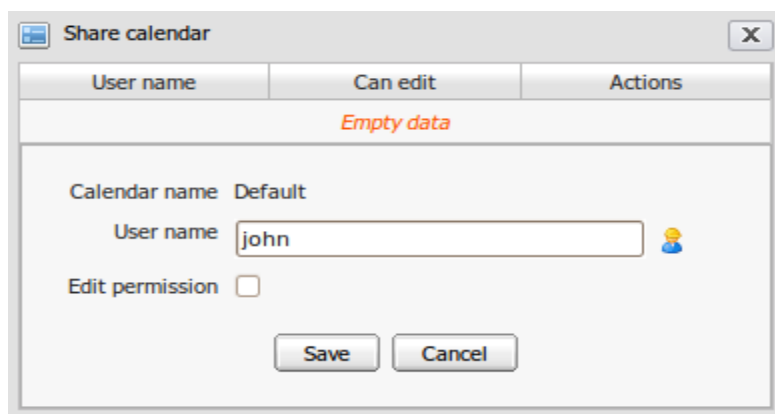
**Details:**

<b>Calendar name</b>	The name of the calendar that you choose to share
<b>User name</b>	The name of the users who you want to share your calendar with
<b>Edit permission</b>	This option allows granting edit permission on the calendar to selected user

**Step 2:** Select users to share.

**To select users for sharing, do the following :**

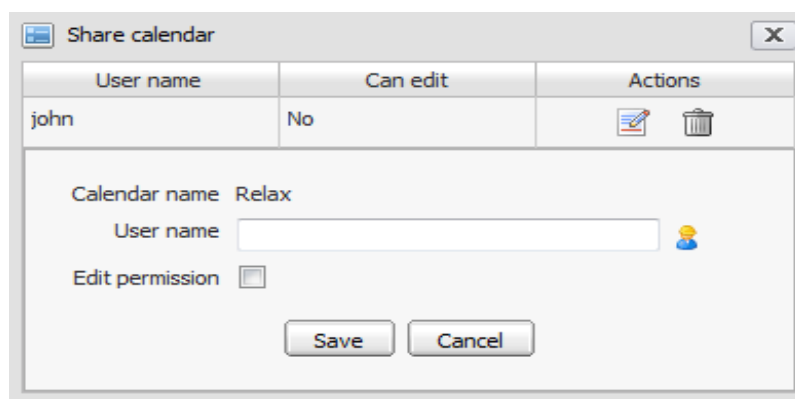
1. Click on the  icon at the right of the **User name** field.
2. Select users that you want to share. For example, select **John** in **/platform/administrator** group or you can manually input in the **User name** field. The Shared users will be displayed in the **User name** field.





**Step 3:** Check the **Edit permission** check box if you want to share the edit right with the selected users.

**Step 4:** Click **Save** to complete sharing the calendar.

After sharing a calendar successfully, the shared users will be displayed in the Share table below:



- To change the **Edit permission** of a shared user by clicking the **edit** icon 
- To delete a shared user from the shared table by clicking the **Delete** icon  corresponding to the shared user. The deleted shared users will not be able to view the shared calendar any more.

### 3.4.5 Change the calendar color

When you have many calendars display on the screen, it will be hard to recognize what calendar is for what activities. If you have to work with a few calendars, it's helpful to assign colors to distinguish your calendars from one another.

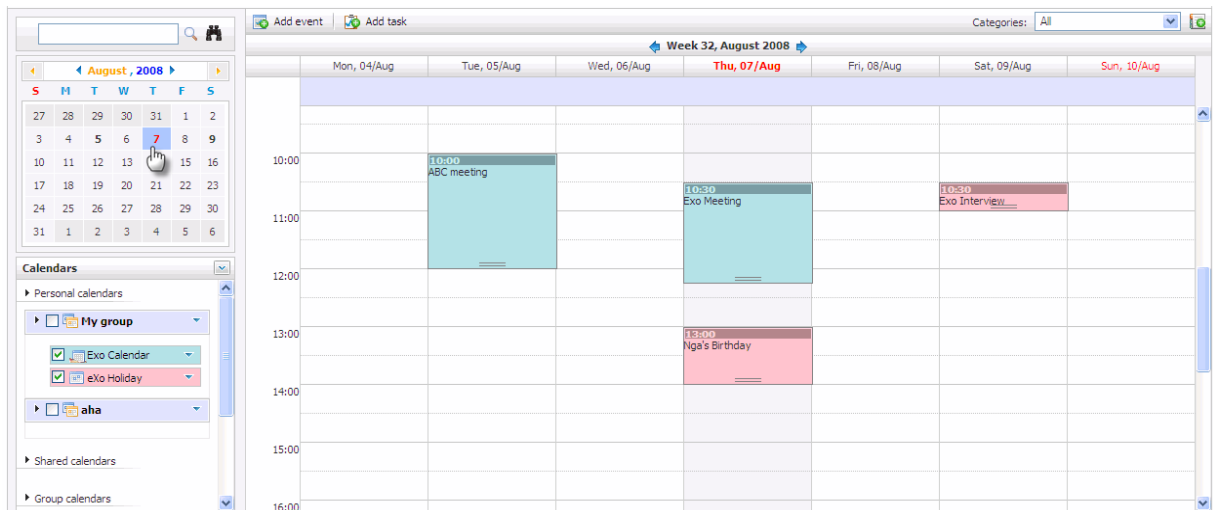
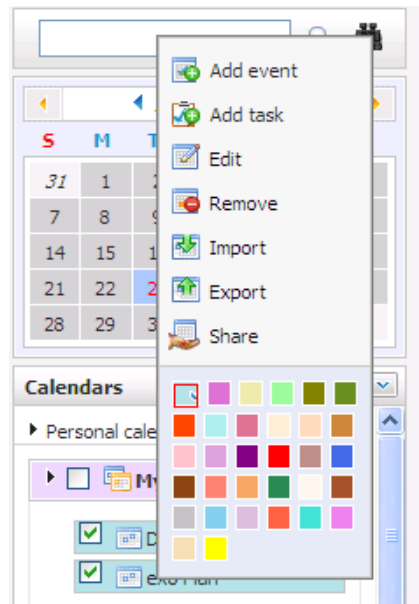


Illustration 35: The Calendar view panel with different events/tasks on different calendars

- ✓ To change calendar color, do as follows:

**Step 1:** Right-click on the name of the calendar to open the drop-down menu and then select a color for your calendar from the color palette. There are 32 colors available:



**Step 2:** Change color by selecting the specific color area. After being changed a color, the calendar will be displayed with your new selected color.

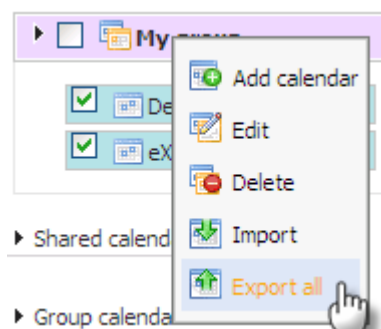
### 3.4.6 Export calendars

This function allows exporting a calendar to a separate file on your computer. You can only export the calendar which has at least one event inside it. You also can export any calendar types including personal, shared and group calendar if you have the edit right.

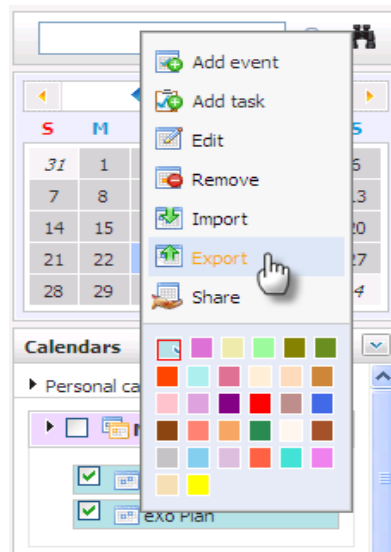
✓ **To export calendars, do as follows:**

**Step 1:** Open the **Export Calendars** form by two ways:

**The 1<sup>st</sup> way:** Right-click on the name of the calendar group to open the drop-down menu, then select **Export all** in the menu:



**The 2<sup>nd</sup> way:** Right-click on the name of the calendar and select the **Export** item in the menu:



The **Export calendars** form will appear:

A screenshot of the 'Export calendars' dialog box. It has a title bar with a close button. Inside, there is a 'File name' text field, an 'Export format' dropdown menu set to 'iCalendar(.ics)', and a 'Relax' checkbox which is checked. At the bottom are 'Save' and 'Cancel' buttons.

Illustration 36: The Export calendars form

**Step 2:** Enter a name in the file name field.

**Step 3:** Select a type of the export format in the list box. For instance, iCalendar (.ics)

**Step 4:** Select the calendar you want to export by checking its check box.

**Step 5:** Click **Save** to accept exporting the selected calendars.



*You can export personal, shared and public calendar which you have the edit permission*

*You can only open the file if you have an application installed on your computer that supports the format of the exported file.*

### 3.4.7 Import calendars


This function allows importing one or more calendars in a file from your computer to a selected

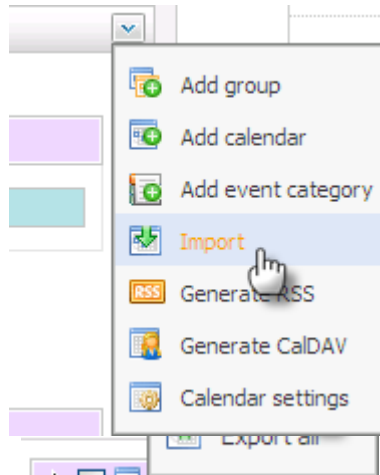


calendar group in Calendar.

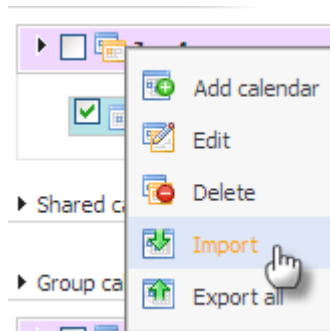
- ✓ **To import calendar, do as follows:**

**Step 1:** Open the **Import Calendars** form:

**The 1<sup>st</sup> way:** Left click the  icon at the right top of the calendar list and then select the **Import** item in the menu:



**The 2<sup>nd</sup> way:** Right-click on the name of the calendar group to open the drop-down menu and then select the **Import** item:



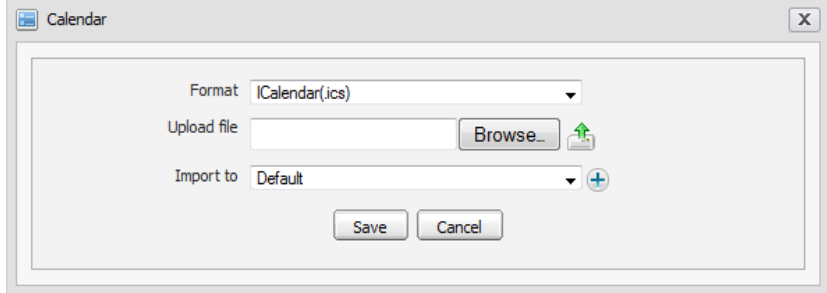



**The 3<sup>rd</sup> way:** Right-click on the specific calendar in the calendar list and select the **Import** item in the menu.

The **Calendar** form will appear:

Illustration 37: The Import calendars form


Details:

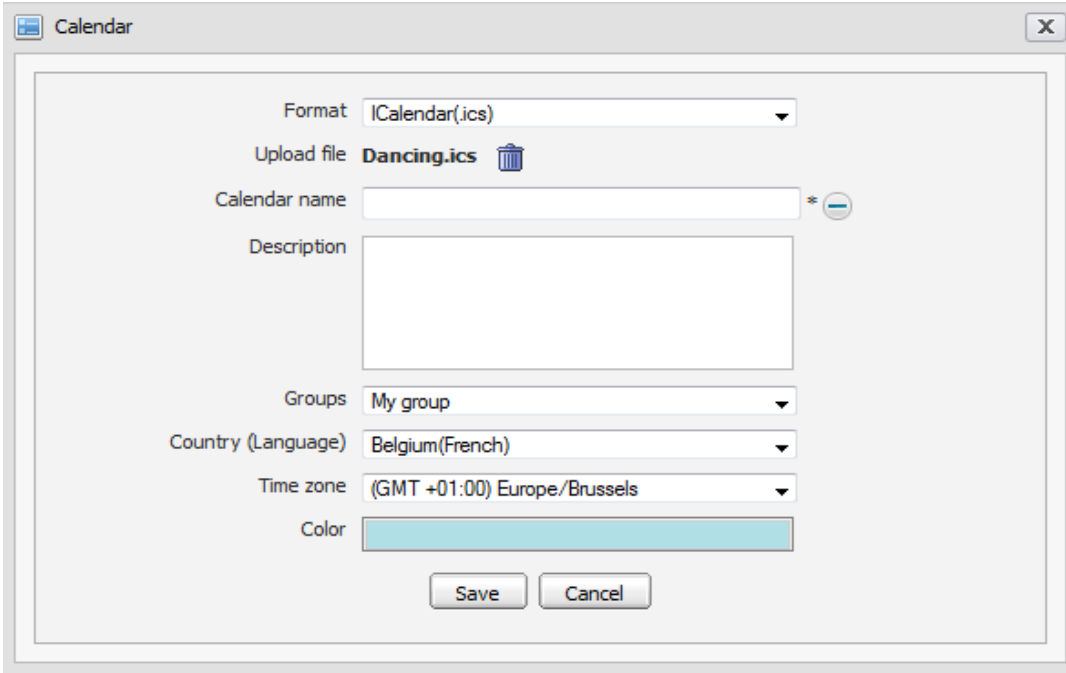
<b>Format</b>	The format of the imported file. There are 2 options: *.ics and *.csv
<b>Upload file</b>	The path of the upload file
<b>Browse button</b>	To select the uploaded file from your local computer
	To start uploading the selected file.
<b>Calendar name:</b>	The display name of the imported calendar.
	This icon is used to unhide a form used to import an uploaded file to existed calendar:
	
	You can click  icon to import the uploaded file to new calendar.

<b>Description</b>	The brief description about the imported calendar.
<b>Groups</b>	The group that the imported calendar belongs to.
<b>Country</b>	The country of the imported calendar.
<b>Time zone</b>	The time zone of the imported calendar.
<b>Color</b>	The color of the imported calendar.

**Step 2:** Select a type of the import format. For example: ICalendar(.ics)

**Step 3:** Click the **Browse...** button to select a file in your computer and then click on the

**Upload** icon  to upload the selected file.



**Step 4:** Type calendar name, description, language, groups, etc for imported calendar.

**Step 5:** Click **Save** to accept importing calendar with the selected file .



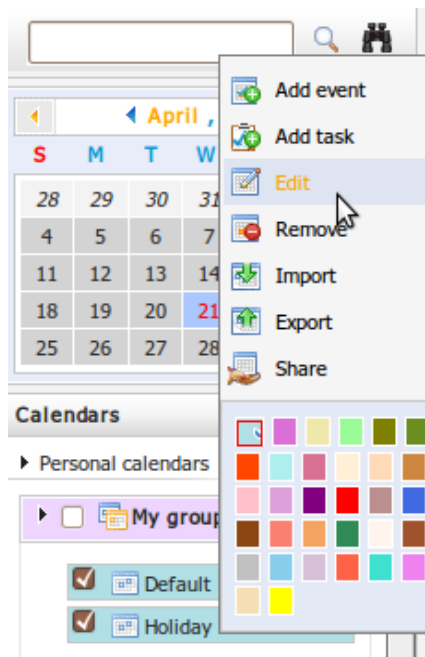
*You can only import calendar to a personal calendar. At present, Collaboration Calendar only supports \*.ics and \*.csv format.*

### 3.4.8 iCal

iCal is a personal Calendar application in Calendar portlet. It contains a link that allows downloading a file having all the events and tasks in a calendar and also allows the creator of the calendar to be for personal use or share with other users.

- ✓ **To access to iCal support, do as follows:**

**Step 1:** Right-click on the name of a calendar that you want to access to iCal (e.g: Holiday) and then click Edit in the drop-down menu:



The **Calendar** form will appear with a **Calendar Details** tab for the personal Calendar:

Calendar

Calendar details

Display name: Holiday \*

Description:

Groups: My group

Country (Language): Belgium(French)

Time zone: (GMT +01:00) Europe/Brussels

Color:

Private URL: **ICAL**

Public URL: This calendar is not public access. [Enable Public Access](#)

Save Reset Cancel

**Step 2:** You can use the Calendar for your own need with **Private URL** or share it to other user with **Public URL**.

**Private URL:** ICal is used for personal usages. It means that you, the creator of the calendar can download it to your computer and use any calendar applications which support .ics format to open it. You can also import it into another calendar.

1. Click the **ICAL** icon in the **Calendar** form:

Calendar

Calendar details

Display name: Holiday \*

Description:

Groups: My Group

Country (Language): Belgium(Dutch)

Time zone: (GMT +01:00) Europe/Brussels

Color:

Private URL: **ICAL**

Public URL: This calendar is not public access. [Enable Public Access](#)

Open

Save Reset Cancel

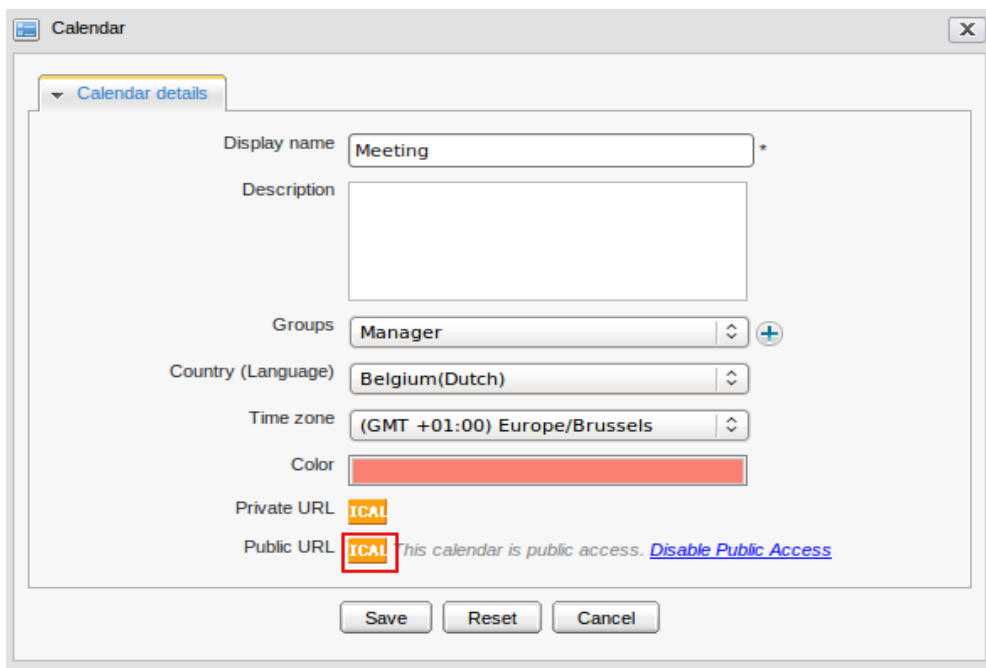
2. Click **OK** on the pop-up that appear to accept downloading the calendar.

Now, you can use any desktop applications which support the .ics file format to directly view the events and tasks on that application.

**Public URL:** Public Url link allows you share your calendar with other users. They must use a calendar application which supports the .ics file to open and directly view the events and tasks in the calendar on that application, or they can import the your calendar into their calendar. By default, Public Url is empty and it is only accessible when public access is explicitly enabled.

To get the public Url, do as follows:

1. Click "Enable Public Access" .

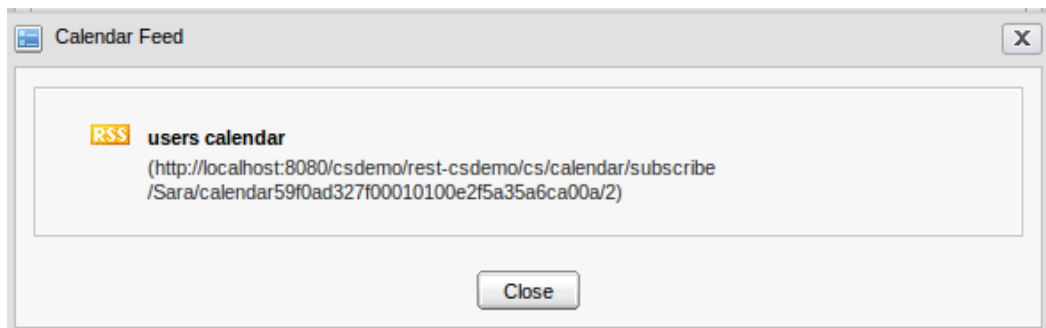


The screenshot shows a 'Calendar' dialog box with a 'Calendar details' tab. The fields are as follows:

- Display name: Meeting
- Description: (empty text area)
- Groups: Manager
- Country (Language): Belgium(Dutch)
- Time zone: (GMT +01:00) Europe/Brussels
- Color: (red color bar)
- Private URL: ICAL
- Public URL: ICAL *this calendar is public access.* [Disable Public Access](#)

Buttons at the bottom: Save, Reset, Cancel.

2. Click the **ICAL** icon, a **Calendar Feed** form will pop up:



The screenshot shows a 'Calendar Feed' dialog box with the following content:

**RSS users calendar**  
(<http://localhost:8080/csdemo/rest-csdemo/cs/calendar/subscribe/Sara/calendar59f0ad327f00010100e2f5a35a6ca00a/2>)

Close

You can use the link provided in this form to send to other users. They can use this link to download your calendar and import to any calendar application that supports .ics format.

## 3.5 Manage Events

On your calendar, events are for scheduling things at specific times. You can invite people to events, such as a business meeting, and people can also invite you to events. In a corporate environment, you can use an event to schedule the use of a resource, such as a conference room, or presentation.

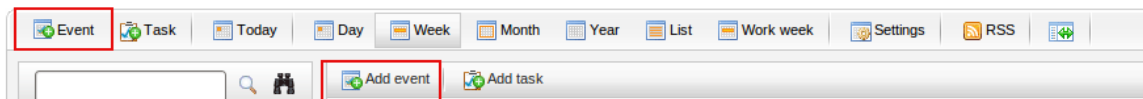
### 3.5.1 Add a new event

This function allows adding a new event in Calendar portlet.

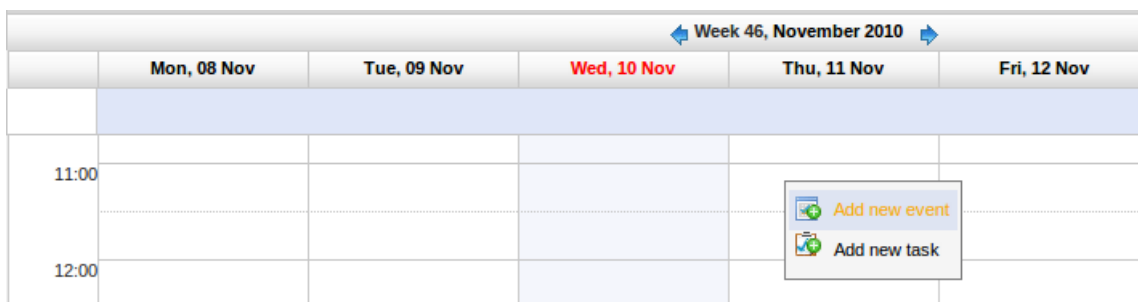
- ✓ **To add a new event, do as follows:**

**Step 1:** Open the **Add Event** form.

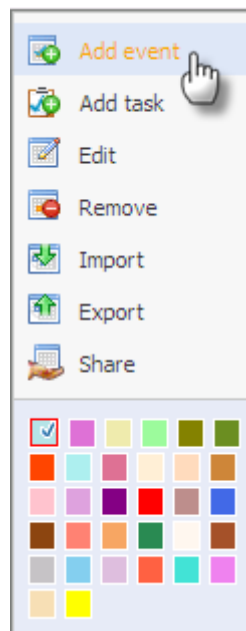
**The 1<sup>st</sup> way:** On the tool bar, click the **Event** icon for the **Quick add event** or the **Add Event** icon for detail one.



- **The 2<sup>nd</sup> way:** Create an event directly on the calendar view panel by right-clicking on it and select the **Add new event** item in the drop-down menu or left-click directly at the date/time you want to add a new event or drag/drop on calendar view panel to add an event with a specific time.



- **The 3<sup>rd</sup> way:** Create an event directly at the calendars selector level by right-clicking on the calendar name and select the **Add Event** item in the menu:



The **Quick add event** form will appear:

**Illustration 38: The Quick add event form**

Details:

<b>Event Summary</b>	The event title. This field is required.
<b>Description</b>	The detailed description of the event.



<b>From</b>	The starting date/time of the event.
<b>To</b>	The ending date/time of the event.
<b>All day</b>	This option allows setting the event duration to be all day or not. If you don't check this option, you have to define the starting date/time and ending date/time. By default, the starting date and ending date is the current date.
<b>Calendar</b>	The calendar will include the event
<b>Event Category</b>	The category will include the event.
<b>More details button</b>	To show the event in more detail that allows defining more properties for the event

**Step 2:** Fill values to all the required fields

**Step 3:** Complete adding a new task by clicking **Save**. The added task will be displayed when viewing the calendar in which it is stored.

You can finish at step 3, but if you want to add more details to your event, click the **More detail** button. The **Event** form will be displayed with 4 tabs :

Detail, Reminders, Participants, Schedule


The screenshot shows a web-based form titled "Add/edit event" with a close button (X) in the top right corner. Below the title bar are four tabs: "Detail" (selected), "Reminders", "Participants", and "Schedule". The "Detail" tab contains the following fields:

- Event summary:** A text input field containing "Rock party" with an asterisk (\*) indicating it is required.
- Description:** A large text area for additional details.
- Location:** A text input field.
- From:** Two input fields for date and time, showing "12/02/2010" and "19:00".
- To:** Two input fields for date and time, showing "12/02/2010" and "23:00".
- All day:** An unchecked checkbox.
- Priority:** A dropdown menu set to "None".
- Repeat:** A dropdown menu set to "No repeat".
- Calendar:** A dropdown menu set to "administrators calendar".
- Event Category:** A dropdown menu set to "All" with a plus icon (+) to the right.
- Attachments:** A plus icon (+) to add attachments.

At the bottom of the form are two buttons: "Save" and "Cancel".

**Illustration 39:** The Detail tab of the Add/Edit event form

- The **Detail** tab contains basic information of an event:



<b>Event Summary</b>	The event title. This field is required.
<b>Description</b>	The brief description of the event.
<b>Location</b>	The location where the event will take place.
<b>From</b>	The start date/time of the event.
<b>To</b>	The end date/time of the event.
<b>All day</b>	All day option allows setting the event duration to be all day or not..If you don't check this option, you have to define the start date/time and end date/time. By default, the start date and end date is current date.
<b>Priority</b>	The priority level of this event: None, Normal, High and Low
<b>Repeat</b>	The repeat time or recurring time for the event, such as weekly team meeting, monthly report... There are many options available: No repeat, Daily, Working days, Weekend, Weekly, Monthly, Yearly.
<b>Calendar</b>	Chose the calendar that will include the event.
<b>Event Category</b>	Chose the category of the event. .
	Click this icon to open the <b>Event categories</b> dialog.
<b>Attachments</b>	The list of attached files to the event. The attachment may be a spreadsheet or a presentation needed for the event.


- The **Reminders** tab:

The reminder function is used to remind users who will take part in the event. A reminder includes the summary information about the event such as a title, time, a place where that event will happen, etc.

Illustration 40: The Reminders tab of the Add/Edit event form

Details:

<b>Send mail before event starts in</b>	The interval time (in every # minutes) that the reminder will be repeated before an event starts.
<b>Repeat</b>	The check box allows setting the email reminder of the event repeat or not.
<b>Also send reminders to</b>	The list of email addresses to which the reminder will be sent. The default value is the email address of the current user.
<b>When event starts in next</b>	The interval time (in every xxx minutes) the pop up reminder will be repeated before the event starts.
<b>Repeat</b>	The check box allows setting the event's pop up reminder repeat or not.
	To add more emails.
	To delete emails.

To add more emails , in the **Select email** form, click on the  icon. The **Select an email** form will appear:

<input type="checkbox"/>	Name	Email
<input checked="" type="checkbox"/>	John Anthony	john@localhost
<input type="checkbox"/>	Mary Kelly	mary@localhost
<input type="checkbox"/>	Demo gtn	demo@localhost
<input type="checkbox"/>	Kaka Lele	th4nhc0n89@yahoo.com
<input type="checkbox"/>	Aha Nguyen	th4nhc0n9@yahoo.com
<input type="checkbox"/>	Root Root	root@localhost.vn
<input type="checkbox"/>	Minh Duc	minhduc@gmail.com
<input type="checkbox"/>	Quynh Lien	quynhlien.84@gmail.com
<input type="checkbox"/>	Hoa Hoa	hoahoa@yahoo.com
<input type="checkbox"/>	John Lee	johnlee@yahoo.com

Illustration 41: The Select an email form

Email addresses are available in the list and can be selected by checking the corresponding checkboxes.

The **Address books** and the **Search** function allow filtering and searching the expected email result.

Click the **Add** button to add the selected emails to the **Also send reminders to** fields or click the **Replace** button to replace existing emails by the selected emails or click **Cancel** to close this form.




- After adding email addresses, the email addresses of the selected contacts are displayed in the **Also send reminders to** field of the **Reminders** tab.
- When the Remind by email function is used, the notification email about the event will be sent at the defined time expectedly.
- When the Show a notification pop up is used, the notification pop up about the event will appear when using Calendar at the defined time expectedly.

- The **Participants** tab: This tab allows you to select other users who will join in your event.

Illustration 42: The Participants tab of the Add/Edit events form

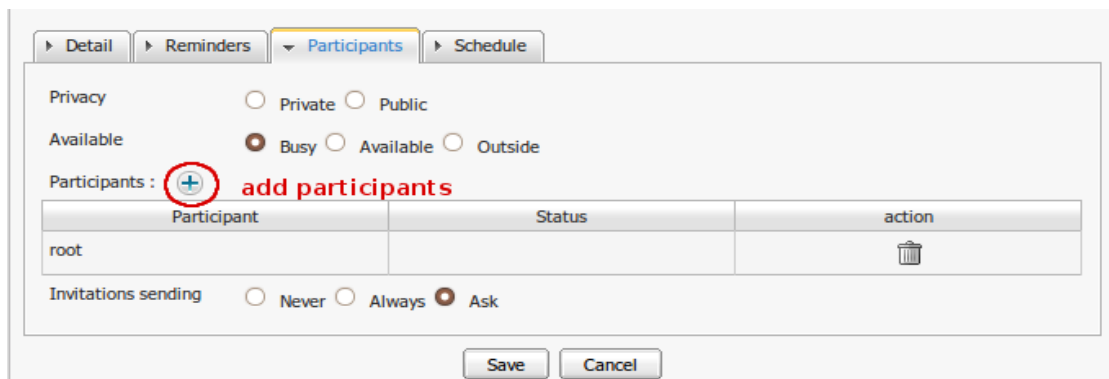
Details:

<b>Privacy</b>	The privacy of the event. An event may be public or private. The default value of this field is 'Private'. (At present, public or private has informative meaning only. There is no effect)
<b>Available</b>	The status of participants. There are 3 options: Busy, Available and Outside. If participants select <b>Busy</b> or <b>Outside</b> , the time the participant takes part in the event/task will be in red when viewing the event/task schedule. If they select <b>Available</b> , the time the participant takes part in the event/task will be in white.
<b>Participants</b>	<p>The list of participants (If the <b>Send an invitation</b> option is selected, they will receive invitation via email ). You can click on the  icon to add more participants. The <b>Participant</b> table lists all users taking part in the event and their status. The status may be <b>Yes</b>, <b>No</b> or <b>Pending</b> depending on the invitation confirmation of the participant: Yes, No or May be.</p> <ul style="list-style-type: none"> <li>• If Yes, the status will be <b>Yes</b>: It means that the users accept joining the event</li> <li>• If No, the status will be <b>No</b>: It means that the user will not join the event</li> <li>• If the participant has not confirmed whether he/she participate or not or answer with 'May be' option, the status is <b>Pending</b>: It means that the invitation is pending for the user's approval .</li> </ul> <p>The <b>Action</b> column allows deleting the participant in the list.</p>
<b>Invitations sending</b>	<p>This option will be loaded by default with the value defined in the Calendar Settings. There are 3 options that can be reselected:</p> <ul style="list-style-type: none"> <li>✓ <b>Never</b>: The event invitation will not be sent to any participant.</li> <li>✓ <b>Always</b>: The event invitation will always be sent to the participants.</li> </ul>

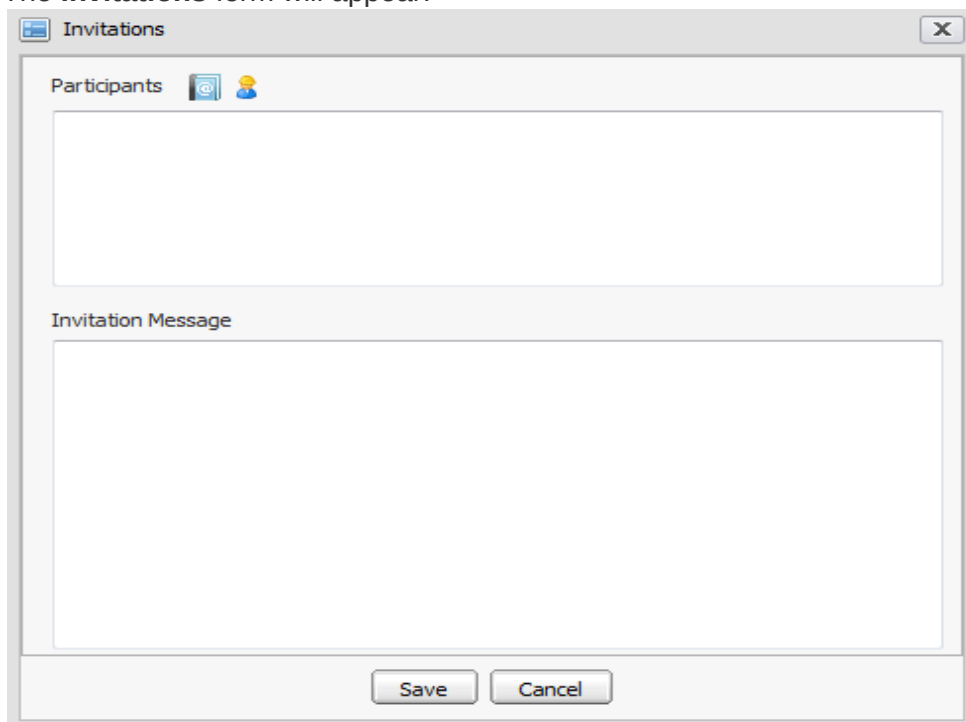
- ✓ **Asked:** There will be a confirmation message which confirms that whether you want to send the invitation or not.

- ✓ **To select users to participates in invite box, do as follows:**

**Step 1:** click the  icon.




The **Invitations** form will appear:



**Illustration 43: The Invitations form**

In details, the Invitations form includes **Participants** information and the content of the **Invitation Messages**.

**Step 2:** The participants can be added from the Address Book by clicking the  icon


<input type="checkbox"/>	Name	Email
<input checked="" type="checkbox"/>	John Anthony	john@localhost
<input type="checkbox"/>	Mary Kelly	mary@localhost
<input type="checkbox"/>	Demo gtn	demo@localhost
<input type="checkbox"/>	Kaka Lele	th4nhc0n89@yahoo.com
<input type="checkbox"/>	Aha Nguyen	th4nhc0n9@yahoo.com
<input type="checkbox"/>	Root Root	root@localhost.vn
<input type="checkbox"/>	Minh Duc	minhduc@gmail.com
<input type="checkbox"/>	Quynh Lien	quynhlien.84@gmail.com
<input type="checkbox"/>	Hoa Hoa	hoahoa@yahoo.com
<input type="checkbox"/>	John Lee	johnlee@yahoo.com

Illustration 44: The Select Address form`

To select participants, select the check box corresponds to users that you want to invite.

To search the desired users, enter a keyword and click the search icon.

**Address books** filter and the **Search** function allow filtering and searching expected user result. Click the **Add** button to add the selected users to the **Participants** table or click the **Close** button to close this form.

The participants can be also selected from the user picker by clicking on the  icon

Email addresses are listed and they can be selected by selecting the corresponding check box(s).

<input type="checkbox"/>	User Name	First Name	Last Name	Email
<input checked="" type="checkbox"/>	demo	Demo	gtn	demo@localhost
<input type="checkbox"/>	john	John	Anthony	john@localhost
<input type="checkbox"/>	mary	Mary	Kelly	mary@localhost
<input type="checkbox"/>	root	Root	Root	root@localhost

Illustration 45: The Select users form

Group and Search function allow filtering and searching the expected mail result..

**Step 3:** Click the **Add** button to add selected emails to the **Participants** table or click the **Close** button to close this form.

After adding a user, the selected user name is displayed in the **Participants** table of the **Participants** tab.

■ The **Schedule** tab:

**Illustration 46: The Schedule tab of the Add/Edit events form**

This tab allows you to check the availability of the participants in a defined slot of time (by default, it is the start and end time of the event which you define in the detail tab). You can easily detect the schedule conflicts to manage the alternate meeting time that works best for all of the participants.

The selected users in the **Participants** field of the **Participants** tab will be displayed in participant list of the **Schedule** tab.

✓ **To add participants:**

**Step 1:** Click the **Add attendee** icon  on left panel

**Step 2:** The Select users form appears that allows selecting the attendees.

✓ **To delete participants:**

**Step 1:** Select the participant's name that you want to delete by ticking on User check box

and then click the **Remove attendee** icon  on left panel

**Step 2:** The selected participants are deleted from the participant list of the **Schedule** tab and **Participants** tab



✓ **To apply selected date:**

**Step 1** Add any users to participants list. For example, add **john** and **root** who attends to other events.

**Step 2:** Check the **Apply selected date** check box. It means that selected date From/To in the left panel is applied

**Step 3:** Availability time of user **John** and user **root** are shown below:

The screenshot shows the 'Add/edit event' dialog box with the 'Schedule' tab selected. At the top, there are tabs for 'Detail', 'Reminders', 'Participants', and 'Schedule'. Below the tabs, there is a section for 'Apply selected date' with a checkbox, 'From' and 'To' date fields, and an 'All day' checkbox. The main area is a calendar grid for February 23, 2010, showing hours from 00 to 23. A vertical red line is positioned at 09:00. Below the calendar, there is a 'Participants' list with checkboxes for 'john' and 'root'. At the bottom right, there are checkboxes for 'Available' (white) and 'Busy' (red). At the bottom center, there are 'Save' and 'Cancel' buttons.

You can select the slot of time to check visually by moving mouse in time panel. The selected period will become green and the corresponding time will be displayed in 'From' and 'To' fields of the **Detail** tab.

After you fill in needed fields, you can complete adding a new event by clicking **Save**. The confirmation message will appear:

The screenshot shows a 'Confirm' dialog box with a message: "The event will be saved and invitations sent. Do you confirm?". At the bottom, there are two buttons: 'Save and Send' and 'Save'.

**Illustration 47: The Confirm form**

Click **Save and Send** to save and send an invitation. Click **Save** to accept adding a new event.

The added event will be displayed when viewing the calendar in which the event is stored. Since eXo Collaboration is integrated with eXo Social, you will see the event updated in your Activity Stream of your Space or Group Space.

Activity Stream of Jack



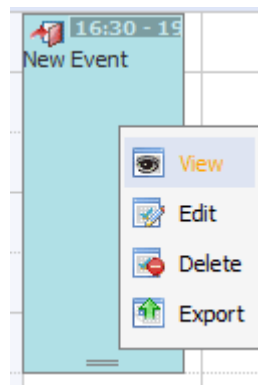
**Jack**  
The following event has been updated: Rock Party  
[More info](#)  
Description: Annual Rock fest for all rock fans!!  
Location: Rex Restaurant  
Start time: Nov 5, 2010 8:30:00 PM CET  
End time: Nov 5, 2010 10:15:00 PM CET  
less than a minute ago \* [Comment](#) | [Like](#)

[Refuse](#) [Accept](#)

The event will be updated in your Activity Stream the brief information about the event like description, location, start time and end time. You can even refuse or accept participating in this event directly in Activity Stream without going to Calendar portlet.

### 3.5.2 View event details

To view an event of a specific calendar with more details, directly right-click on the event in the Calendar View Panel and select the **View** item in the menu:



The **Preview** form will appear:

**Preview**

From: 02/24/2010 16:30  
To: 02/24/2010 19:30  
[Assessment.odt](#) (31.69 KB)  
[ModernTech.odt](#) (10.44 KB)

**New Event**  
Location:  
Event repetition: No repeat  
Description: Event for you  
Reminder: [email](#)  
Privacy: Public  
Availability: Busy  
Invitation email:  
Participants: root  
john

Illustration 48: The Preview event form

At the **Preview** form, if the event includes attachments, you can download any attachment by directly clicking on the title of the attachment,

### 3.5.3 Edit event details

This function allows making changes to an existing event.

- ✓ **To edit an event, do as follows:**

**Step 1:** Open the **Add/ Edit** form by right- clicking on the event that you want to edit and select the **Edit** item in the menu:



The **Add/Edit event** form is displayed and full filled with all information event, available for editing like adding a new event:

**Illustration 49: The Add/edit event form**

**Step 2:** Modify information of the selected event by following the steps like creating a new event.

**Step 3:** Complete editing by clicking **Save** to accept saving changes.



- When editing you can add/ remove the attachment files or download them by directly click on the titles
- If you only want to change the starting date and time of the event, you can also use the dragging and

*dropping feature to edit the time for the event directly on Calendar view panel.*

- You can only edit events in personal, shared and group calendars which you have edit permission.

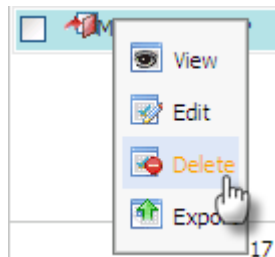
### 3.5.4 Delete an event

This function allows removing events from a calendar.

- ✓ To delete an event, do as follows:

The 1<sup>st</sup> way:

**Step 1:** Right-click on the event that you want to delete then click **Delete** in the menu:



**Step 2:** Complete deleting the event by clicking **OK** in confirmation message that appears.

The 2<sup>nd</sup> way:

**Step 1:** Choose the **month** view and all the events / tasks are listed in the Calendar View Panel view, → Check to the check box(es) in front of the event name → click the

 **Delete checked** icon on the action bar:

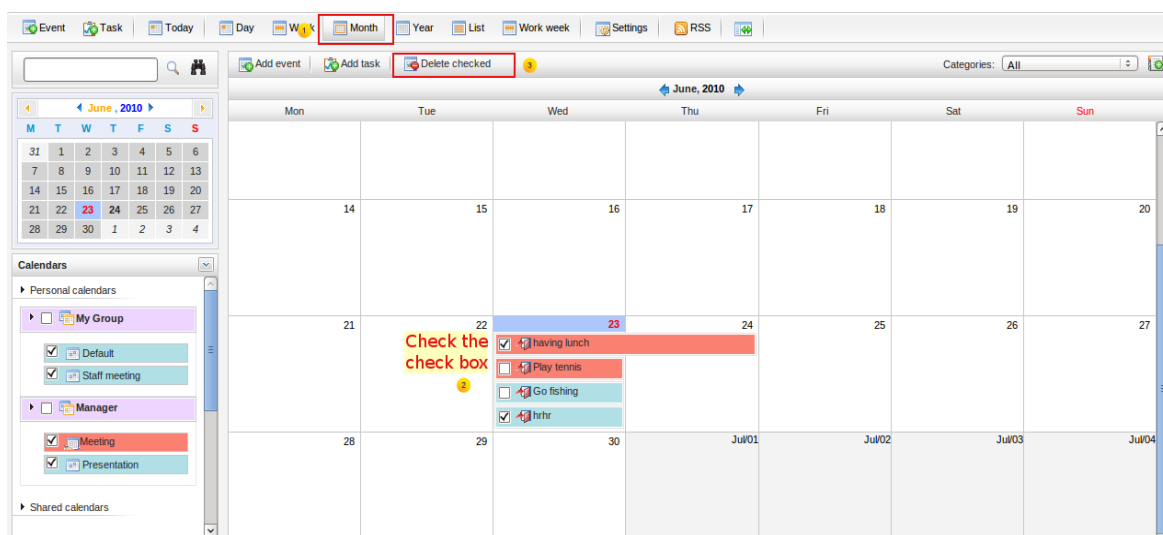


Illustration 50: The Month View of the Calendar panel

**Step 2:** The confirmation message will appear, click **OK** to accept deleting the selected

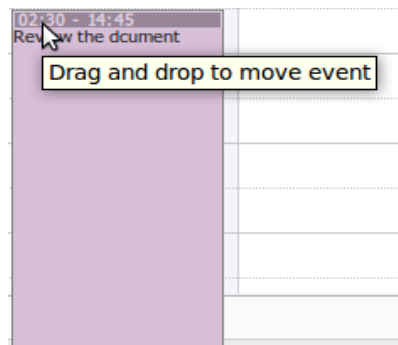
event or click **Cancel** to exit deleting the event



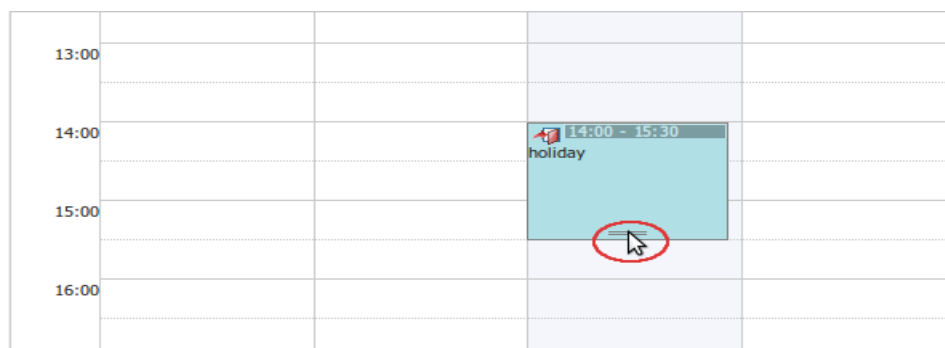
*You can only delete events in the personal, shared and group calendars which you have edit permission.*

### 3.5.5 Drag and drop an event

The dragging and dropping feature helps you change the starting date and time of an event more conveniently. You only need to click on the event, drag it and drop it on another new day, new time area in the Calendar view panel.



To change the event duration (in day view, week view and working view only), use your mouse and the control at the bottom of the event.



- According to the features of the Calendar panel view, the drag and drop feature can be applied to the date and time differently.
- In Day view, all events are shown in a day, you can change the time of the event in one day only.
- In Week and Work Week view, all events are shown in a week, you can change both the event time and the event date.
- In Month view, all events are shown in a month, you can change the event date only.

You can also change more events at the same time by ticking on their check boxes and using the drag and drop feature.



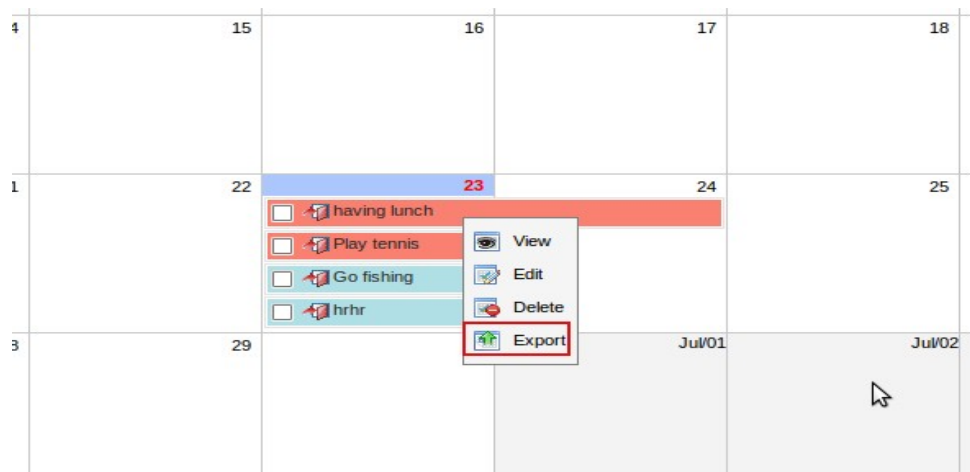
*You can only drag and drop events in the personal, shared and group calendars which you have edit permission. For example, if you drag and drop an event which you do not have edit permission, a warning message shows that you are not allowed to edit this event/task.*

### 3.5.6 Export an event

This function allows exporting one event into a separate file on your computer.

✓ To export an event, do as follows:

**Step 1:** Right-click on the event that you want to export and select **Export** in the menu:



The Export calendars form will appear like the illustration below:

**Step 2:** Enter a name into the File name field to export.

**Step 3:** Click **Save** to accept exporting the event.

**Step 4:** There will be a pop-up appear to allow saving the exported file. Click **OK** to save the exported file into your local computer.



*In fact, exporting an event means exporting a calendar with one event only. Therefore, the exported file format and the way to export an event is similar with the way to export a calendar with multiple events and tasks.*

### 3.5.7 Import an event

This function allows importing an event into a specific calendar.

In fact, importing an event means importing a calendar with one event only. Therefore, the way to import an event is similar with import a calendar.

You can see 3.4.7 Import Calendar for details.

## 3.6 Manage Tasks

Just like events, tasks also appear on your calendar, but you can't invite people to them. You can see a list of your tasks and set status for them as completed, in progress or canceled task. For example, you can create a task like clean your room, or write a report due on a certain date.

### 3.6.1 Add a new task

This function allows adding a new task in Calendar.

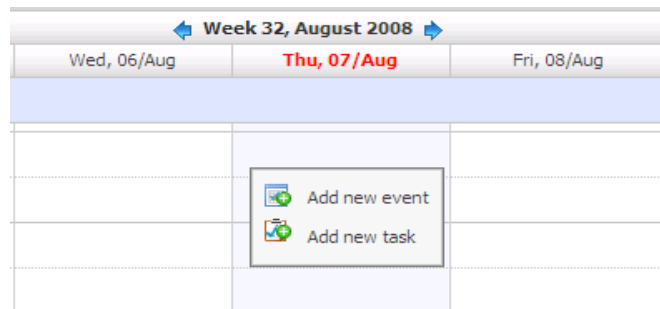
- ✓ **To add a new task, do as follows:**

**Step 1:** Open the **Add task** form. You can do this step by three ways:

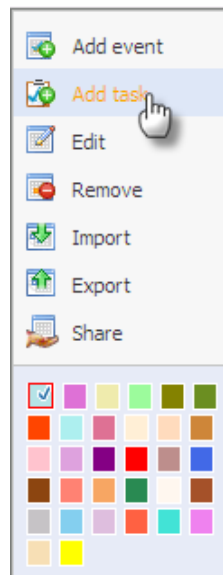
- **The 1<sup>st</sup> way:** Click the **Task** icon for the **quick add task** or the **Add Task** icon for the **detail add task** on the tool bar:



- **The 2<sup>nd</sup> way:** Create a task directly on the calendar view panel by right-click on it: and select **Add new task** item in the drop list menu :



- **The 3<sup>rd</sup> way:** Create an event directly at the calendars selector level by right clicking on the calendar name and select **Add Task** item in the menu:



The **Quick add task** form will appear:



**Quick add task**

Task

Note

From

To

All day ☐

Calendar

Task category

Illustration 51: The Quick add task form

Details:

<b>Task</b>	The name of the task.
<b>Note</b>	The note of the task.
<b>From</b>	The starting date/time of the task.
<b>To</b>	The ending date/time of the task.
<b>All day</b>	<b>All day</b> option allows setting the duration of the task to be all day or not. If you don't check this option, you have to select the starting date/time and ending date/time. By default, the starting date and ending date is the current date.
<b>Calendar</b>	The calendar will include the task.
<b>Task category</b>	The category will include the task.
<b>More details</b>	To show the event in more details that allows defining more properties for the task

When the **More detail** button is clicked or add task by clicking the Add detail task button on the menu bar, the Add/Edit tasks form is displayed with two tabs (Detail and Reminders) which allows defining task in more details:


- The **Detail** tab allows defining detail task information.



The screenshot shows the 'Add/Edit tasks' window with the 'Detail' tab selected. The form contains the following fields and controls:

- Task name:** A text input field with an asterisk (\*) indicating it is required.
- Note:** A large text area for a description.
- Task delegations:** A text input field showing 'root' and a '+' icon to add more delegations.
- From:** A date/time input field showing '02/23/2010'.
- To:** A date/time input field showing '02/23/2010'.
- All day:** A checkbox.
- Priority:** A dropdown menu currently set to 'None'.
- Calendar:** A dropdown menu currently set to 'Outgoing'.
- Task Category:** A dropdown menu currently set to 'Holiday' with a '+' icon to add more categories.
- Task status:** A dropdown menu currently set to 'Needs action'.
- Attachments:** A '+' icon to add attachments.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

**Illustration 52: The Detail tab of the Add/Edit tasks form**

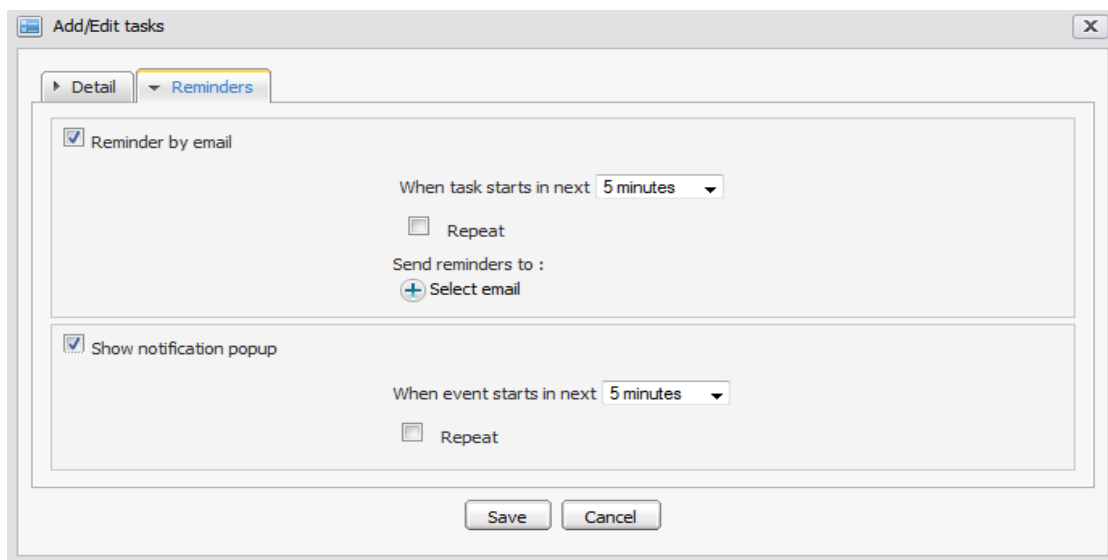
Details:

<b>Task name</b>	The name of the task.
<b>Note</b>	The notice or description of the task
<b>Task delegations</b>	The user(s) to whom you would like to delegate the task. You can manually input or click the  icon to select users from the <b>Select users</b> form
<b>From</b>	The start date/time of the task
<b>To</b>	The end date/time of the task
<b>All day</b>	All day option allows setting the task to be all day or not.
<b>Priority</b>	The priority level of the task.

<b>Calendar</b>	The calendar will include the task.
<b>Task Category</b>	The category will include the task that can be selected from the existing tasks or added a new one by clicking the  icon to open the <b>Event categories</b> form.
<b>Task status</b>	The status of the task. This field can be set to: Need action, In Process, Completed or Canceled.
<b>Attachments</b>	The list of the attached files to the task. The attachment may be a spreadsheet or a presentation needed for the task. To attach file, click the  button


The **Reminders** tab: The reminder function is used to remind users who will take part in the task. A reminder includes the summary information about the task such as title, time, place where the task will happen, etc.

The **Reminder by mail**:



**Illustration 53: The Reminders tab of Add/Edit tasks form**

Details:

<b>When task starts in next</b>	The interval time(in every xxx minutes) that the reminder will be repeated before the task starts and a mail reminder is sent before the event starts.
<b>Repeat</b>	This option allows setting the reminder to repeat or not for an event The interval time(in every xxx minutes) that the reminder will be repeated before the task starts.
<b>Send reminders to</b>	The list of email addresses to which the mail reminder will be sent. The default value is the email address of current user. You can click on the  icon to

select emails from the **Select email** form.

Name	Email
<input type="checkbox"/> John Anthony	john@localhost
<input type="checkbox"/> Mary Kelly	mary@localhost
<input type="checkbox"/> Demo gtn	demo@localhost
<input type="checkbox"/> Kaka Lele	th4nhc0n89@yahoo.com
<input type="checkbox"/> Aha Nguyen	th4nhc0n9@yahoo.com
<input type="checkbox"/> Root Root	root@localhost.vn
<input type="checkbox"/> Minh Duc	minhduc@gmail.com
<input type="checkbox"/> Quynh Lien	quynhlien.84@gmail.com
<input type="checkbox"/> Hoa Hoa	hoahoa@yahoo.com
<input type="checkbox"/> John Lee	johnlee@yahoo.com

Total pages: 1

Add Replace Close

- Email addresses are available in the list, can be selected by ticking on its check box(s).
- Group and Search function allow filtering and searching expected mail result..
- Click the **Add** button to add selected emails to 'Send reminder to' fields or click the **Replace** button to replace existing emails by the selected emails or click **Cancel** to close this form.

After adding email addresses successfully, the email addresses of the selected contacts are displayed in the 'Send reminders to' field of the **Reminders** tab.

When Remind by email function is used, the notification email about the task will be sent at the time like its definition expectedly.

When the Show a notification pop up is used, the notification pop up about the task will appear when using Calendar at the defined time expectedly.

**Step 2:** Complete all the field in this form

**Step 3:** Click **Save** to accept creating a new task or **Cancel** to quit this form.

### eXo Collaboration and Space integration:

In your Social Space, you can see your created tasks shown in **My Tasks** gadget.

**My Tasks** [Show all](#)

- ☐ 10:00 PM Clean my room
- ☐ 10:30 PM Complete reviewing docs


You can check the check-box(es) to complete the corressponding task(s) quickly without going to Calendar portlet. There will be a confirmation message , click **OK** to complete your

selected task or **Cancel** to quit.

✓ **To configure My Tasks gadget, do as follows:**

Hover mouse over the **My Tasks** gadget to show the configuration button:



Click on  button, you will see the current settings of this gadget:

Base url	<input type="text" value="/calendar"/>
Subscription url	<input type="text" value="/portal/rest/private/cs/calenda"/>
Number of items is displayed	<input type="text" value="10"/>
Date time format	<input type="button" value="AM/PM"/>
Calendar	<input type="button" value="defaultCalendarName"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

My Tasks	Show all ▾
----------	------------

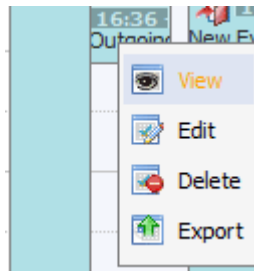
Base url	The url that points to Calendar portlet
Subscription url	The url that points to service from which you will get data from
Date time format	The time format : AM/PM or 24h
Calendar	The calendar from which this gadget will get your tasks data



*Note that eXo Social and eXo Collaboration integration is only in Platform and not available in standalone eXo Collaboration.*

## 3.6.2 View task details

To view details of a task of a calendar, right-click on the task in the Calendar View Panel and select View item in the menu:



The **Preview** form will be displayed below:

Outgoing activities	
Status	Needs action
Priority	None
Start date	02/23/2010 16:36
Due date	02/23/2010 16:51
Delegated to	
Reminder	
Note	Outgoing far from Hanoi

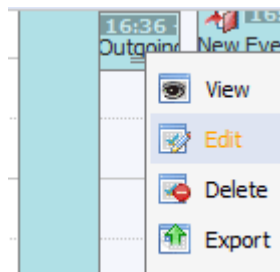
At the **Preview** form, if the task includes attachments, you can view the attachment by clicking on the title of the attachment, a pop up will be displayed, available for saving the attachment file into your local disk.

### 3.6.3 Edit task details

This function allows making changes to existing tasks.

- ✓ To edit a task, do as follows:

**Step 1:** Right click on the task you want to edit and select **edit** item in the menu.



The **Add/Edit tasks** form will be displayed and full- filled with all task information, available for editing like below:

**Step 2:** Modify the information of the selected task by following the steps as you create a new task then complete editing by clicking **Save**.



- When editing the task, you can add, remove the attachment files or download them by directly click on their titles
- If you only want to change the starting date and time of the task, you can also use drag and drop feature to edit the time for the task directly on Calendar view panel.
- You can only edit tasks in personal, shared and group calendars which you have edit permission

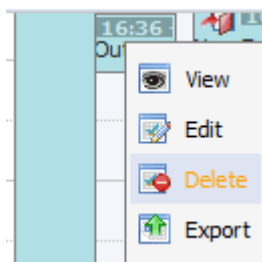
### 3.6.4 Delete a task

This function allows removing task from a calendar.

- ✓ **To delete a task, do as follows:**

**The 1<sup>st</sup> way:**

**Step 1:** Right-click on the task you want to delete then click **Delete** in the menu:



**Step 2:** Complete deleting by clicking **OK** on the confirmation message that appears.

**The 2<sup>nd</sup> way:**

**Step 1:** Choose the **month** view and all the events / tasks are listed in the Calendar View Panel view, → Check to the check box(es) in front of the event name → click the



icon on the action bar:

**Step 2:** A confirmation message will appear. Click **OK** to accept deleting the selected task or click **Cancel** to escape deleting task.



*You can only delete tasks in the personal, shared or group calendars that you have edit permission.*

### 3.6.5 Drag and drop a task

Like dragging and dropping an event, the drag and drop is a feature to change the starting date and time of a task. You only need to click and hold your mouse on the task, drag and drop it to a new day and a new time area in Calendar view panel.

- To change task duration (in day view, week view and working view only), use your mouse and the control at the bottom of the tasks.
- According to the features of Calendar panel view, the drag and drop feature can be applied to the date and time differently.
- In Day view, all tasks are shown in 1 day, you can change the task time in one day only.
- In Week and Work Week view, all tasks are shown in 1 week, you can change both the task time and date.
- In Month view, all tasks are shown in 1 month, you can change the task date only. You can also change more tasks at the same time by checking on their check boxes and using the drag and drop feature.



*You can only drag and drop tasks in the personal, shared and group calendars which you have edit permission. If you drag and drop the task that you do not have edit permission, you will receive a warning message informs that you are not allowed to edit this event/task'.*

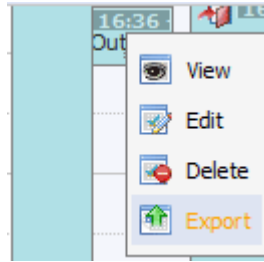
### 3.6.6 Export a task

This function allows exporting one task to a separate file on your computer.

To export a task, do as follows:

**Step 1:** Right click on the task that you want to export and select **Export** in the menu:





The form to export task will appear:

A screenshot of a dialog box titled 'Export calendars'. It contains a 'File name' text input field, an 'Export format' dropdown menu currently set to 'iCalendar(.ics)', and a 'Relax' checkbox which is checked. At the bottom are 'Save' and 'Cancel' buttons.

**Step 2:** Enter a file name to export

**Step 3:** Click **Save** to accept exporting the task.

A pop up that allows saving the exported file will appear:

**Step 4:** Click **OK** on that pop up to save the exported file into local disk.



*Exporting a task means exporting a calendar with one task only. Therefore, exported file format and the way to export a task is similar with the way to export a calendar with multiple events and tasks.*

### 3.6.7 Import a task

This function allows importing a task from your local computer into a specific calendar.

In fact, importing a task means importing a calendar with one task only. Therefore, the way to import a task is similar to the way to import a calendar.

You can see 3.4.7 for details.

## 3.7 Search events/tasks

This function allows finding existing events/tasks according to specific search conditions easily.

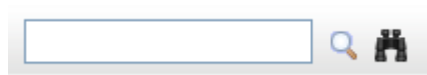
There are 2 search type: Quick Search and Advanced Search

### 3.7.1 Quick Search

This function allows you to do a quick search with specific keyword in all your events/tasks. All events/tasks having the text matching with your search team will be displayed in the search result form.

To do a quick search, do as follows:

**Step 1:** Enter a word in the **Search** field at the top of the mini calendar:



**Step 2:** Click the **Search** icon 

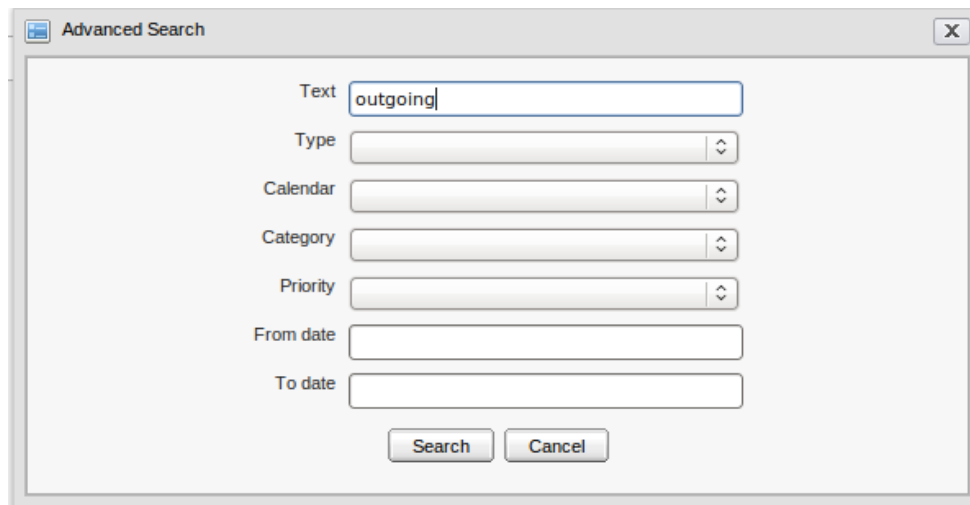
### 3.7.2 Advanced Search

Advanced Search allows you to make a search with multiple criteria.

✓ **To perform an Advanced search, do as follows:**

**Step 1:** Click the **Advanced Search** button  in the search area.

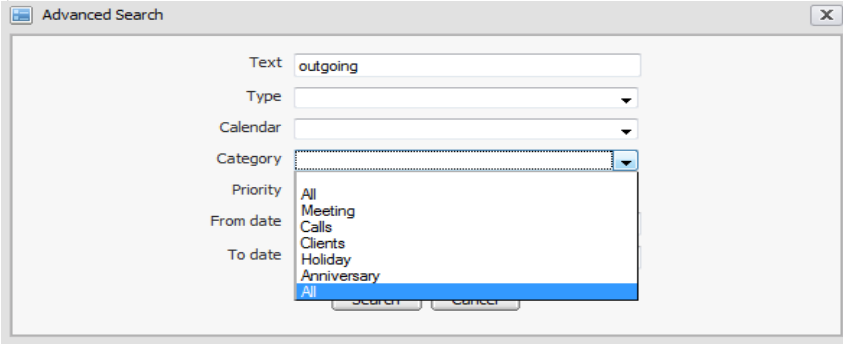
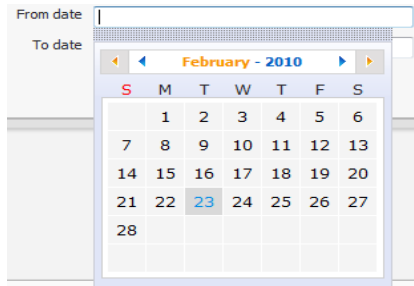
The **Advanced Search** form will appear like the illustration below:



**Illustration 54: The Advanced Search form**

In this form, you can input your search criteria:

<b>Text</b>	This field allows defining the search term or keyword for searching
<b>Type</b>	This field allows defining search type criteria. There are 3 options: leave Blank for searching both events and tasks, Event for searching event only and Task for searching task only
<b>Calendar</b>	This field allows defining the calendar in which the search action is done. All your calendars

	including personal, share and public calendars will be shown in the calendar drop list box, available for selecting.
<b>Category</b>	<p>This field allows defining the category criteria of event/task. All categories are listed in Category drop list box, available for selecting. Only event/tasks having category matching category criteria are shown in search result form.</p> 
<b>Priority</b>	<p>This field allows defining the priority criteria. There are many options: leave <b>blank</b> for searching all, <b>High</b> for searching event/task having high priority, <b>Normal</b> for searching event/task having normal priority and <b>Low</b> for searching event/task having low priority.</p>
<b>From date:</b>	<p>This field allows defining 'From date' criteria. Only the event/task(s) having 'To date' greater than or equal entered 'From date' are listed in the search result form. You can manually input or select date from Calendar selector tool.</p> 
<b>To date:</b>	<p>This field allows defining 'To date' criteria. Only the events/task having 'From date' less than or equal to entered 'To date' are listed in search result form. You can manually input or select date from the Calendar selector tool.</p>

## Step 2: Define some search criteria in the Advanced Search form

**Step 3:** Click the **Search** button to launch the search. All events/tasks matching with your criteria(s) will be listed in the search result form.

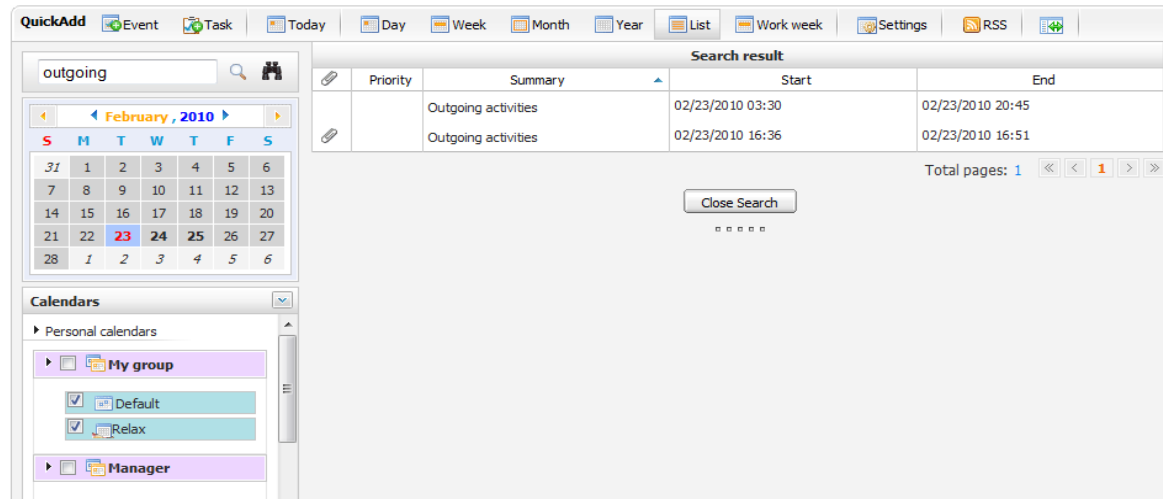


Illustration 55: The Search result form

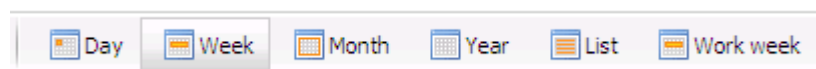


At the search result form, you can also view, edit or delete event/task by right click on it and select action in menu pop up.

## 3.8 Calendar Views

This feature allows you to select how your calendar is displayed: one Day, Week, Month, Year, List and Work Week. By default, the Week view is selected when the calendar is opened at the first time. You can change your view from the main tool bar to make it easy for you to see activities in your calendar. However, changing the calendar view from the main tool bar only has effect for current session. In the next time, you go to Calendar portlet, the view will be back to what has been set in your calendar settings.

To change your calendar view, select one view type on the main tool bar.



- **Day view:**

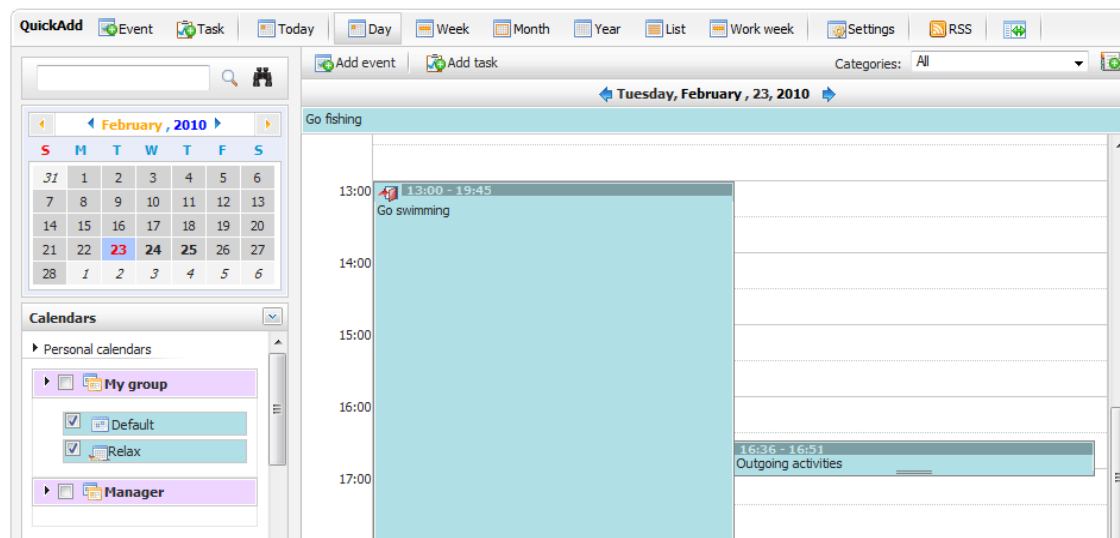


Illustration 56: The Day View

- **Week view:**

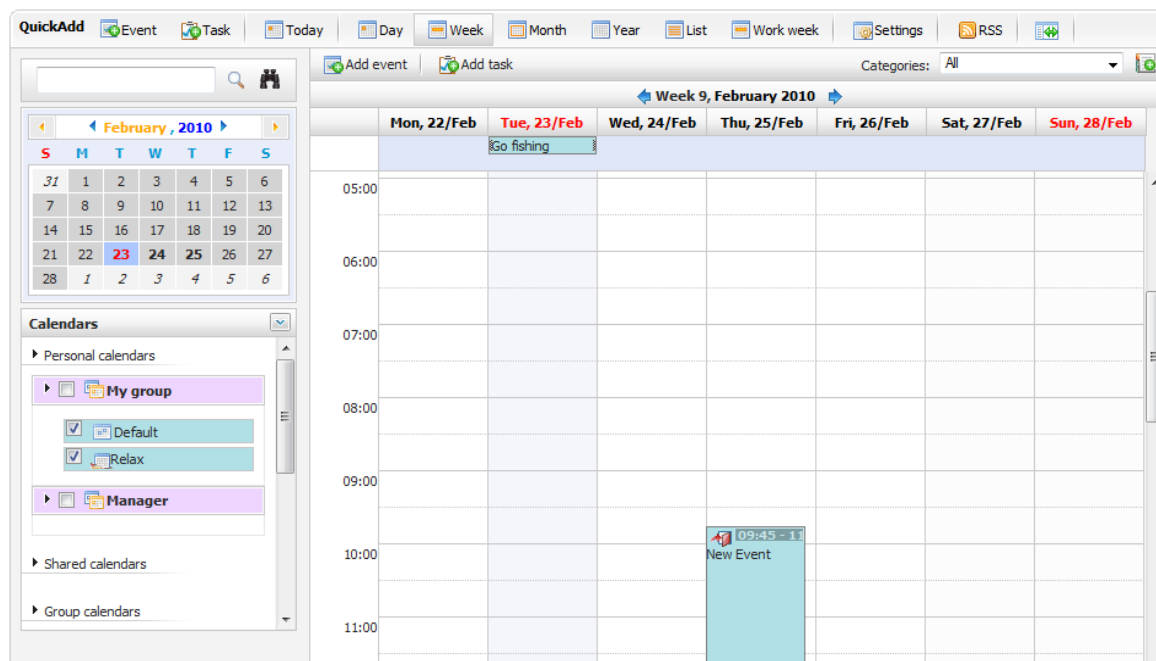
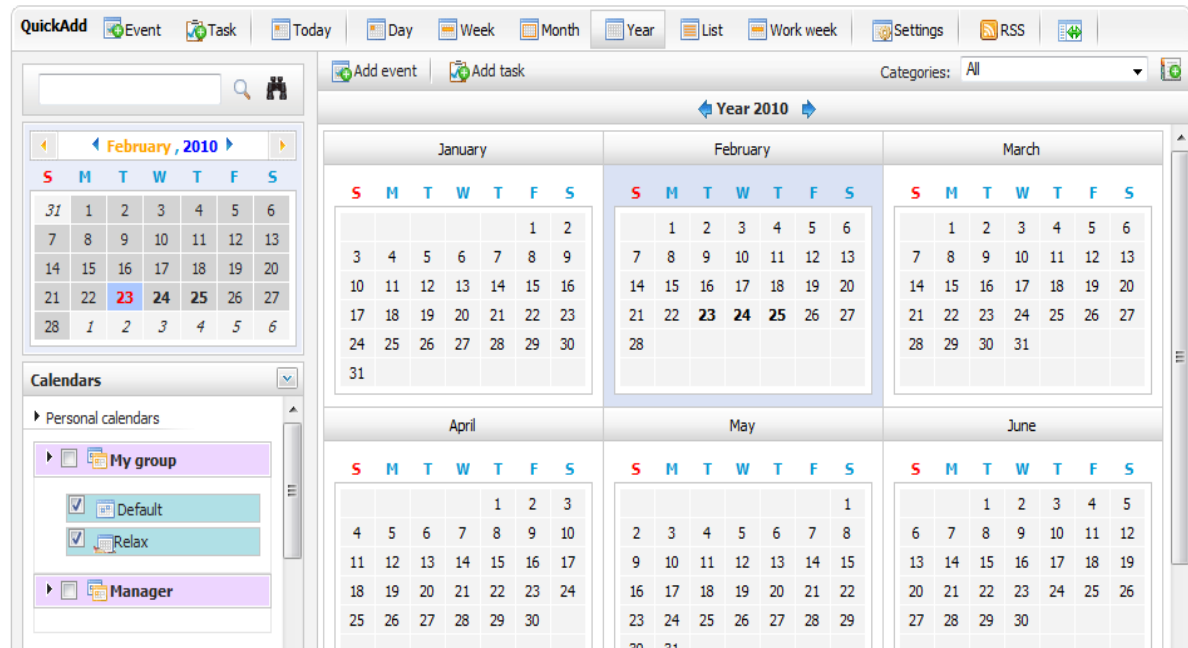


Illustration 57: The Week View

- **Year view:**



**Illustration 58: The Year View**

- **List view:**

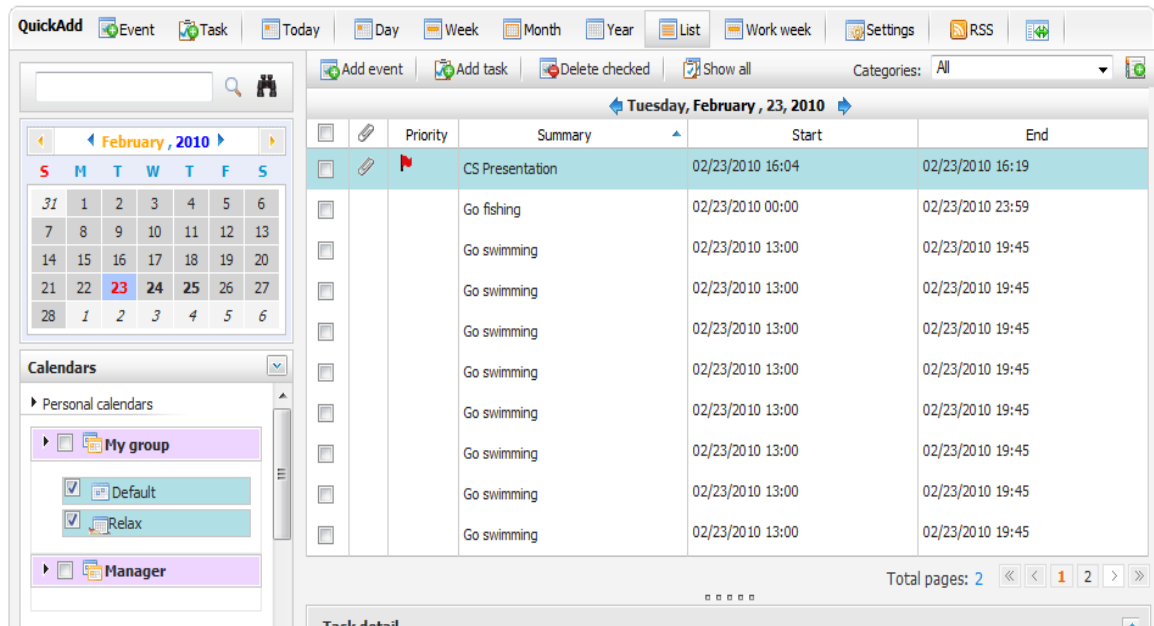


Illustration 59: The List View

- Work week view:

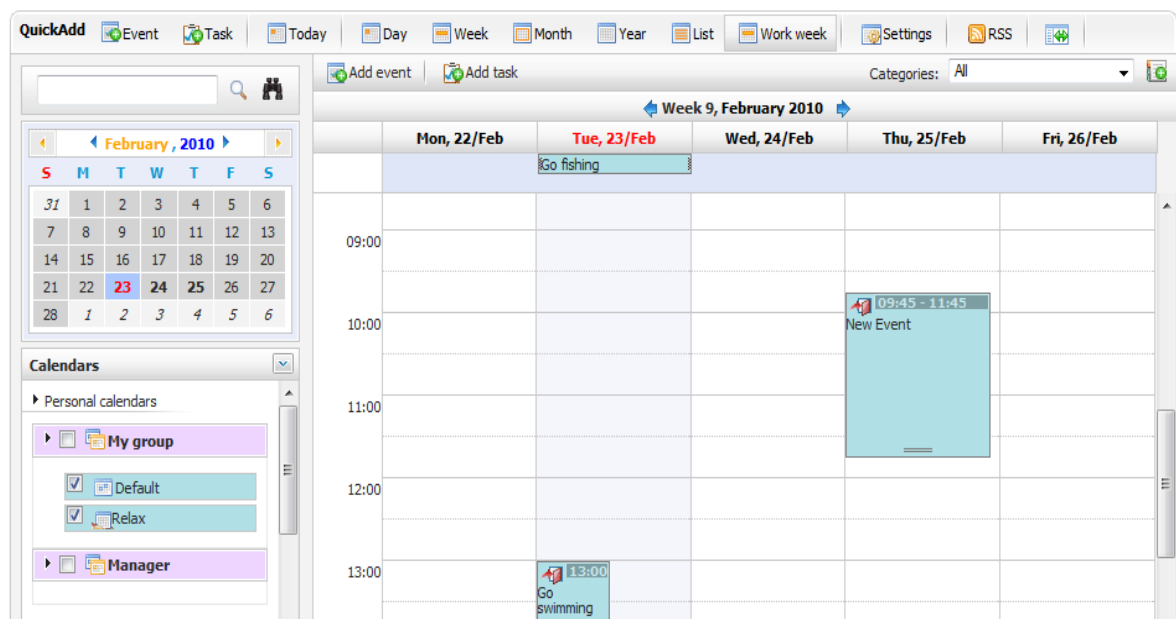


Illustration 60: The Work Week View

- Month view:

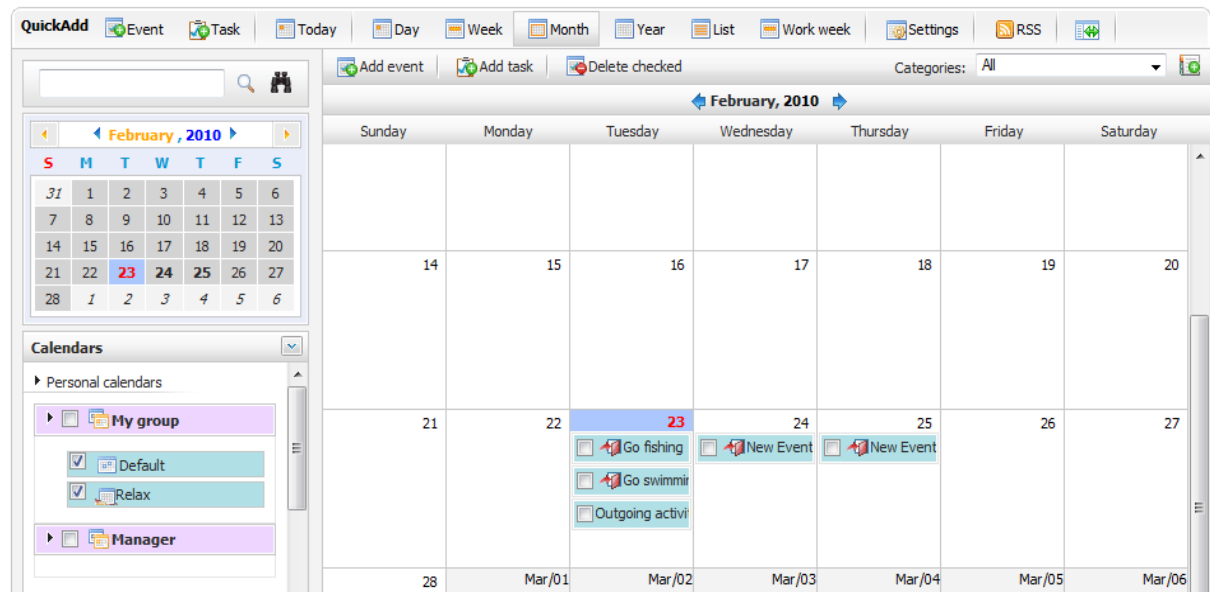


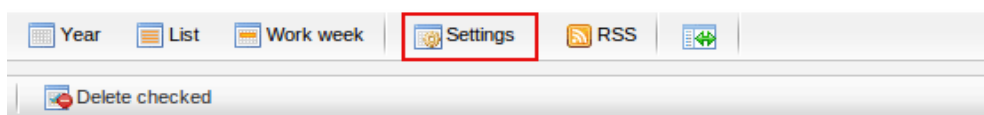
Illustration 61: The Month view


## 3.9 Calendar Settings

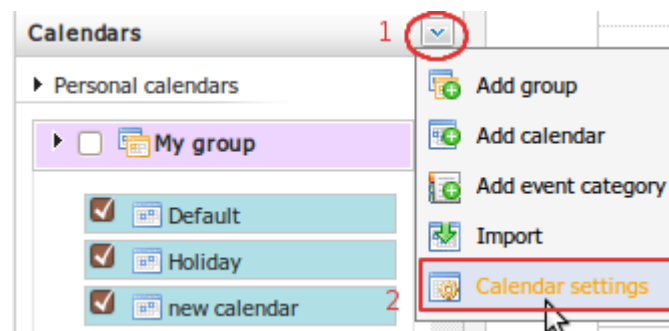
This function allows personalizing your calendar view according to available features. Calendar brings you a wide range of custom settings to set your own calendar.

- ✓ To access the Calendar settings, do as follows:

**The 1<sup>st</sup> way:** Click the  on the main tool bar.



**The 2<sup>nd</sup> way:** Left click on the  icon and select **Calendar settings** in the menu:





The **Calendar settings** form will appear:

- The **Settings** tab includes:

**Illustration 62: The Setting tab of Calendar settings form**

#### Details

<b>View type</b>	The view type of Calendar View Panel. You can define the default view type when you start the Calendar portlet (day, week, month, year, list or working view)
<b>Time interval(in minutes)</b>	The value (in minute) to define the precision of time intervals. In Day view, Week view or Work Week view, the time 'ruler' will be displayed with the interval likes its definition.
<b>Date format</b>	The date format for the date displayed in Calendar such as Starting date, Ending date of event/task.
<b>Time format</b>	The time format for the time displayed in Calendar such as the time in Starting date, Ending Date, the time displayed in Calendar View Panel.
<b>Country(Language)</b>	The default geographical location displayed in Calendar portlet.
<b>Time Zone</b>	The default Time zone displayed in Calendar portlet.
<b>Week start on</b>	The first day of the week displayed in Week view or Work Week view
<b>Show working times</b>	This option allows setting working times when viewing calendar. The working time can be defined by selecting Starting and Ending time.
<b>Send event invitations</b>	When creating an event, you can invite the participants by sending an invitation email. This option is to set by default value for the send event invitations function.

There are 3 options:

- **Never:** The event invitation will not be sent to any participant.
- **Always:** The event invitation will always be sent to the participants.
- **Asked:** There will be a confirmation message to ask whether you want to send the invitation or not.

#### ■ The **Displayed calendars** tab:

This tab allows you to define the calendars which will be displayed when you open Calendar by simply ticking on its check boxes.

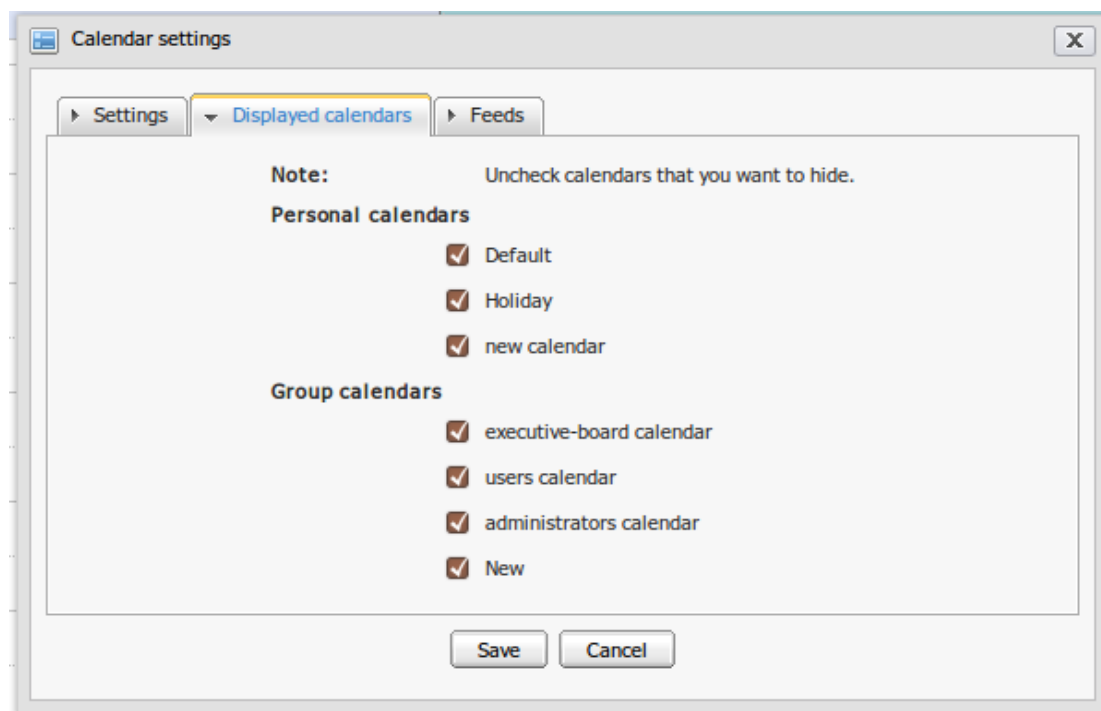


Illustration 63: The Displayed calendars tab of Calendar settings form

## 3.10 Generate RSS

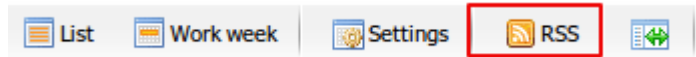
This function allows you to publish your calendar as a RSS feed. It will build an URL that help you keep track of all events via a RSS reader.

#### ✓ To generate RSS in a calendar, do as follows:

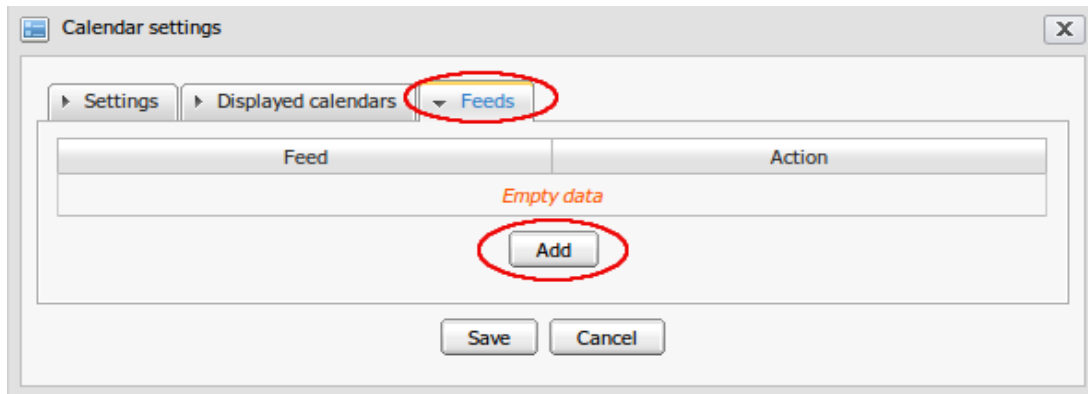
##### Step 1:

- **The 1<sup>st</sup> way:** Open the Calendar settings form, then chose the Feeds tab.
- **The 2<sup>nd</sup> way:** Click directly on the **RSS** icon from the **Toolbar** to directly open the

**Feeds** tab in the **Calendar settings** form:



The **Feeds** tab in the **Calendar settings** form appears like the illustration below:





**Step 2:** Click the **Add** button to add a new feed.

The **Edit Feed** form will be displayed:

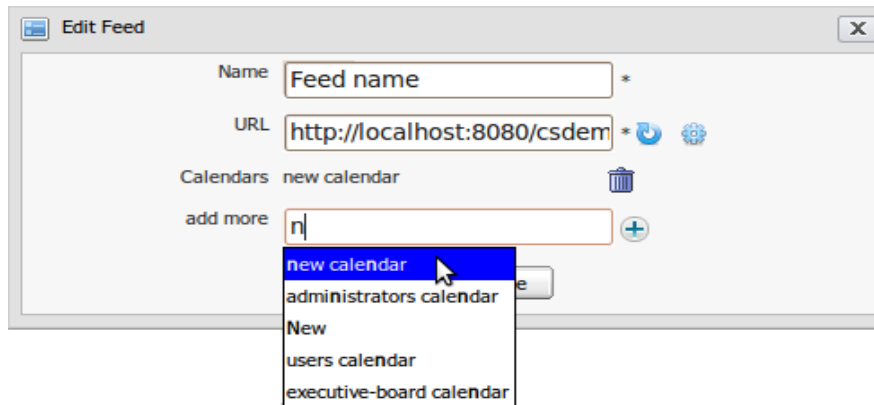
Illustration 64: The Edit Feed form

Details:



<b>Name</b>	The name of the feed. This is a required field
<b>URL</b>	The link of the feed. This is a required field
	Reset the RSS link.
	Generate the RSS link.
<b>Calendars</b>	The name of the calendars.
<b>Add more</b>	Add the name of the calendar that you want to get RSS feed

**Step 3:** Input the name of RSS in the Name field

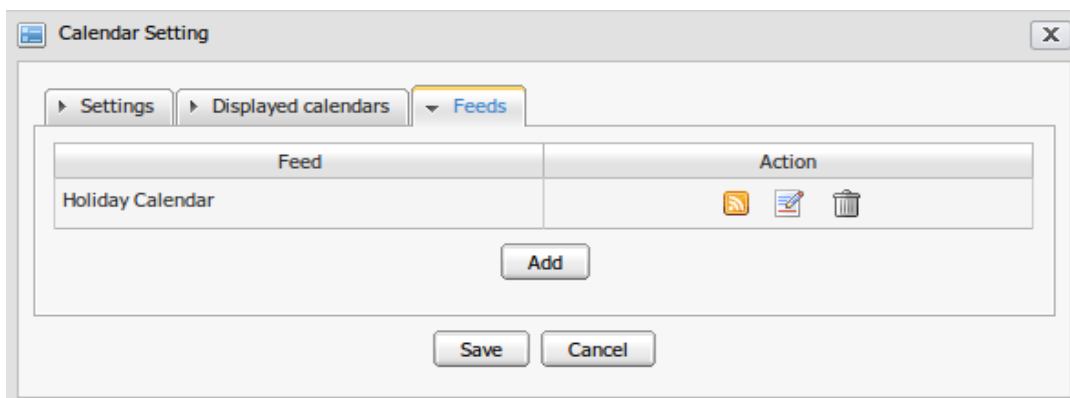
**Step 4:** Input the name of calendar that you want to get RSS feed in the **add more** field.



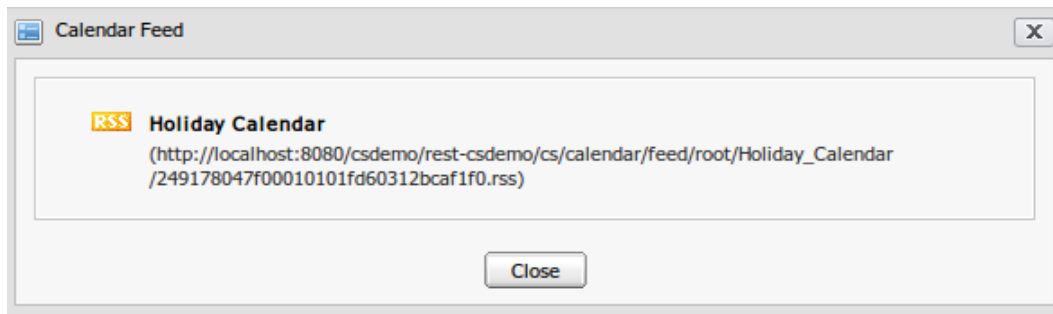
The auto-complete function will help you input the information faster.

**Step 5:** Click the  icon to add more calendars. You also can delete an added calendar by clicking on the  icon corresponding to the calendar name.



**Step 6:** Click **Save** to accept generating the feed or **Cancel** to quit this form. A message will appear to inform that you have generated the feed successfully, just click **OK**. After clicking **OK**, the created feed will be listed like the illustration below:



- You can get the RSS link by clicking on the  icon:



Copy and paste this address link into any calendar product which supports the Rss format (For instance: Mozilla Sunbird application). Then you can view directly in that application.

- You can edit the calendar RSS by clicking on the  icon or delete it by clicking on the  icon.

## 4 Collaboration Chat

### 4.1 What is Collaboration Chat?

Chat is an portlet of eXo Collaboration – an extension of eXo Platform. In Platform you can chat with other users quickly with an easy-to-use integrated Chat portlet. Sending instant messages in Collaboration Chat is as easy as type and click. Besides, this Chat portlet also provide you the ability to create chat room and add contacts from your Collaboration Address Book to your friend list .

In eXo Platform, there is a chat bar at the bottom of the page, where you can access to the Chat portlet as well as other Collaboration applications.



### 4.2 What you can do with Collaboration Chat?


With Collaboration Chat, you can:

- ✓ Set up password-protected chat rooms in just seconds
- ✓ Invite a client, colleague, or vendor to chat, collaborate, and make decisions.
- ✓ Add contacts in Collaboration Address Book to your friends list
- ✓ Join multiple chat rooms

### 4.3 What is a Chat room?

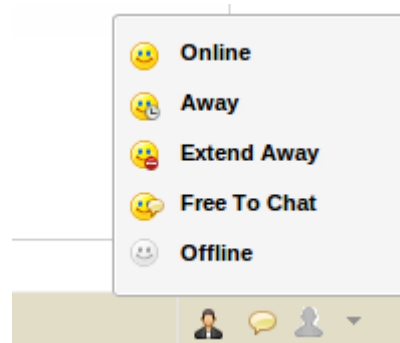
A chat room is a place where people with similar interests can meet and communicate with each other. People can often enter an un-moderated chat room without any verification of who they are. With Chat portlet of eXo Collaboration, you also create a chat room and invite other users join your room. In this way, you can organize and manage your group activities efficiently. It's convenient in corporate environment when you can communicate in multiple chat rooms, each may have different topics and members.

### 4.4 Set your status






When you signed in Chat, by default, your logged-in status is Online and other Chat members will see the online  icon appending to your account name.

- ✓ **To change the online status, do as follows:**

**Step 1:** Click on the account icon in the quick chat bar at the bottom right corner:





**Step 2:** Select one status in the status list.

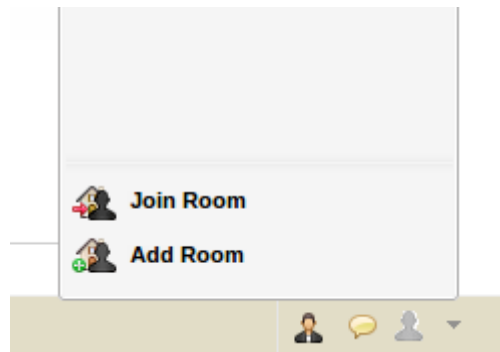
- **Online:** This status means you are available to communicate, other users can contact you by sending instant messages. Your contacts will see the  icon next to your account.
- **Away:** This status means you are away from computer. Other users still can send instant messages to you. Your status icon will change to  icon.
- **Extend Away:** This status means you are away from computer for an extended period of time. Other members will see the  icon next to your account.
- **Free to Chat:** This status means you are free to chat with everyone. The  icon is appended to your account.
- **Offline:** Other users will see the  icon appending to your account. With this status, you are invisible to other users. That means everyone will see you as offline though you are online.

## 4.5 Create a chat room

Collaboration Chat makes your communication with the other contacts easier by letting you create a new chat room. A group of up to 30 users can join a room to talk together. Chat rooms are used to handle group discussions, and everyone sees what the others type in, although other people can decide to break off and have their own keyboard chat.

✓ **To create a new room, do as follows:**

**Step 1:** Click the  **Add Room** button on the action bar in the Chat portlet or click on the  icon and select **Add Room** in the pop-up menu.



The **New Room** form will appear:

Illustration 65: The New Room form

Details:

<b>Name</b>	The name of the room. This field is required
<b>OK button</b>	To accept adding a new room.
<b>Cancel button</b>	To exit/close the <b>New Room</b> form



**Step 2:** Type the room name into the **Name** field of this form.

**Step 3:** Click **OK** to accept creating a new room.

After creating a new room, a **Room Configuration** form will appear. This form allows you to configure some information related to the created room:

The screenshot shows a 'Room Configuration' dialog box with a 'General' tab selected. The fields are as follows:

- Name:** A text field containing 'exo'.
- Persistent Room:** An unchecked checkbox.
- Presence Broadcast:** A list box with 'moderator', 'participant', and 'visitor' selected.
- Who is:** A list box with 'anyone' selected.
- Room Desc:** A text area containing 'eXoers'.
- Max Users:** A dropdown menu set to '30'.

At the bottom, there is a 'Show Security' link and 'Ok' and 'Cancel' buttons.

Illustration 66: The General panel of the Room Configuration form

**General:** This area contains all general information of the created room

<b>Room name</b>	The name of a created room. You cannot change value for this field.
<b>Persistent Room</b>	A persistent room is one that does not get closed when there are no members in it. Check this check box if you want to create a persistent room.
<b>Presence Broadcast</b>	The groups that will be received an message about the status changes of the chat room's members.
<b>Who is</b>	Users that correspond to the selected groups in "Presence Broadcast" will receive the inform message.
<b>Room Desc</b>	The brief description of the chat room.
<b>Max users</b>	The maximum number of users that can join the chat room.

**Security:** This area includes all security information of the created room. To show Security information, click on **Show Security:**

The screenshot shows a 'Room Configuration' dialog box with a 'Security' tab selected. The 'Public Room' checkbox is checked. Other options like 'Members Only', 'Allow Invites', 'Reserved nick', 'Password Protected Room', and 'Moderated Room' are unchecked. The 'Room Admins' and 'Room Owners' text boxes both contain the text 'Root Root'. The 'Ok' and 'Cancel' buttons are at the bottom.

**Illustration 67: The Security panel of the Room Configuration form**

Details:

<b>Public Room</b>	This option is to allow publishing the created room or not. It means after the room has been created, all users can join this room.
<b>Member Only</b>	This option is to publish a room for members of the created room only
<b>Allow Invites</b>	This option is to allow room's members to invite other users to join the room
<b>Reserved nick</b>	This option is to prevent anonymous users from joining the room. If this option is checked, only registered users can enter the room.
<b>Password Protected Room</b>	This option is to change the public room to a locked, secure protected room accessible only to specific individuals with the right password
<b>Password</b>	The password is used to protect the room. This field is shown only when the 'Password Protected Room' option is selected.
<b>Moderated Room</b>	This option is to require whether approve/reject the created room or not.
<b>Room Admins</b>	This option is to select the administration of the created chat room.

<b>Room Owners</b>	The email address of room's creator.
--------------------	--------------------------------------

**Step 4:** Enter values in the **Room Configuration** form.

**Step 5:** Click **OK** in **Room Configuration** form to accept setting values or click **Cancel** to quit without creating a new room.

After creating a new room, there will be a **Conversation** window opened but in locked status. With this status, both the creator and other members cannot join this room to chat.

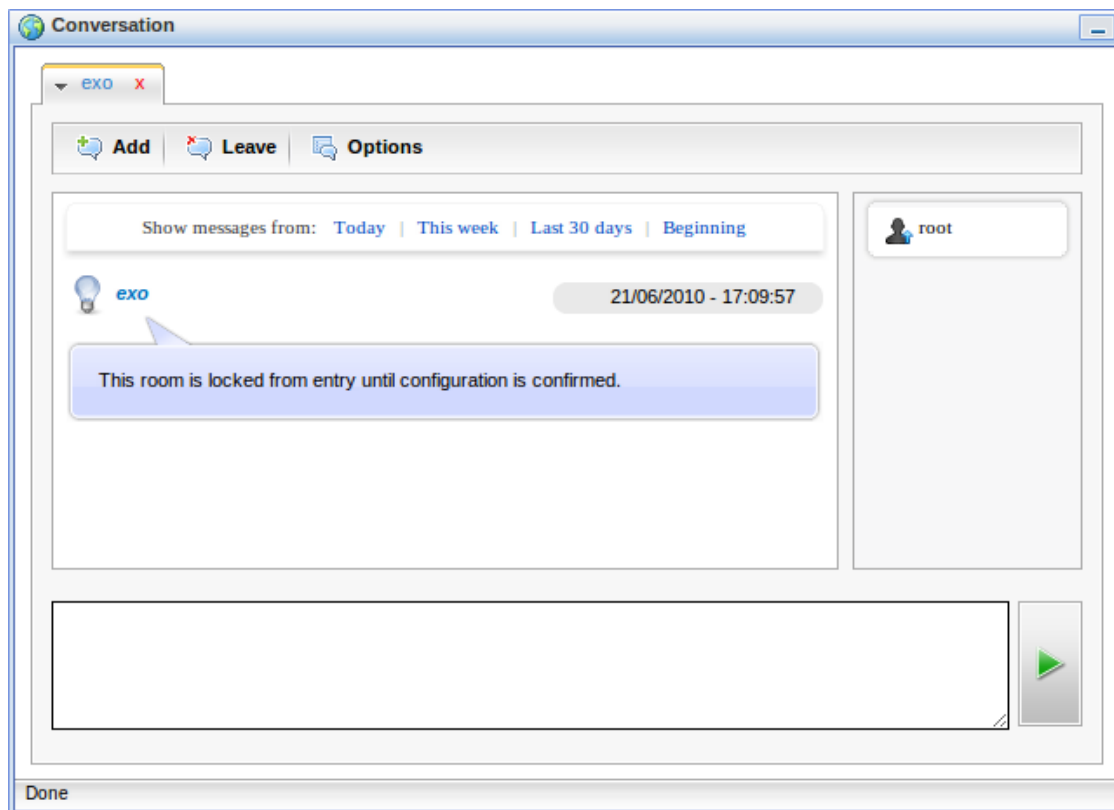




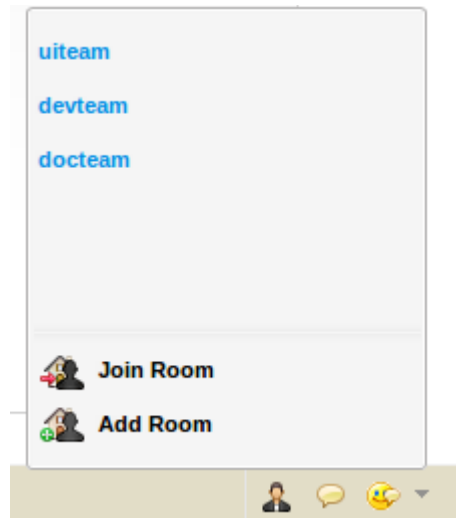
Illustration 68: The Conversation window

Until your room configuration is completed, members can enter the chat room.

## 4.6 Join a room

- ✓ To join a room, do as follows:

**Step 1:** Show the **Join Room** form by clicking the  **Join Room** button on the action bar or click on the  icon and select **Join Room** in the pop-up menu:



The **Join Room** form will appear:

A screenshot of a 'Join Room' dialog box. The dialog has a title bar with a close button (X). Inside, there is a table with two columns: 'Name' and 'Room Desc'. The table contains three rows of data. Below the table, there are three buttons: 'Refresh', 'Join Room', and 'Cancel'.

	Name	Room Desc
<input type="radio"/>	exo	eXoers
<input type="radio"/>	ielts	ielts
<input type="radio"/>	genetic	genetic

Illustration 69: The Join Room form

**Step 2:** Select one room in the list by checking the radio button.

**Step 3:** Click the **Join Room** button to join the selected room. Click the **Refresh** button if you want to clear the selected rooms.

The **Conversation** window of the selected room will appear:

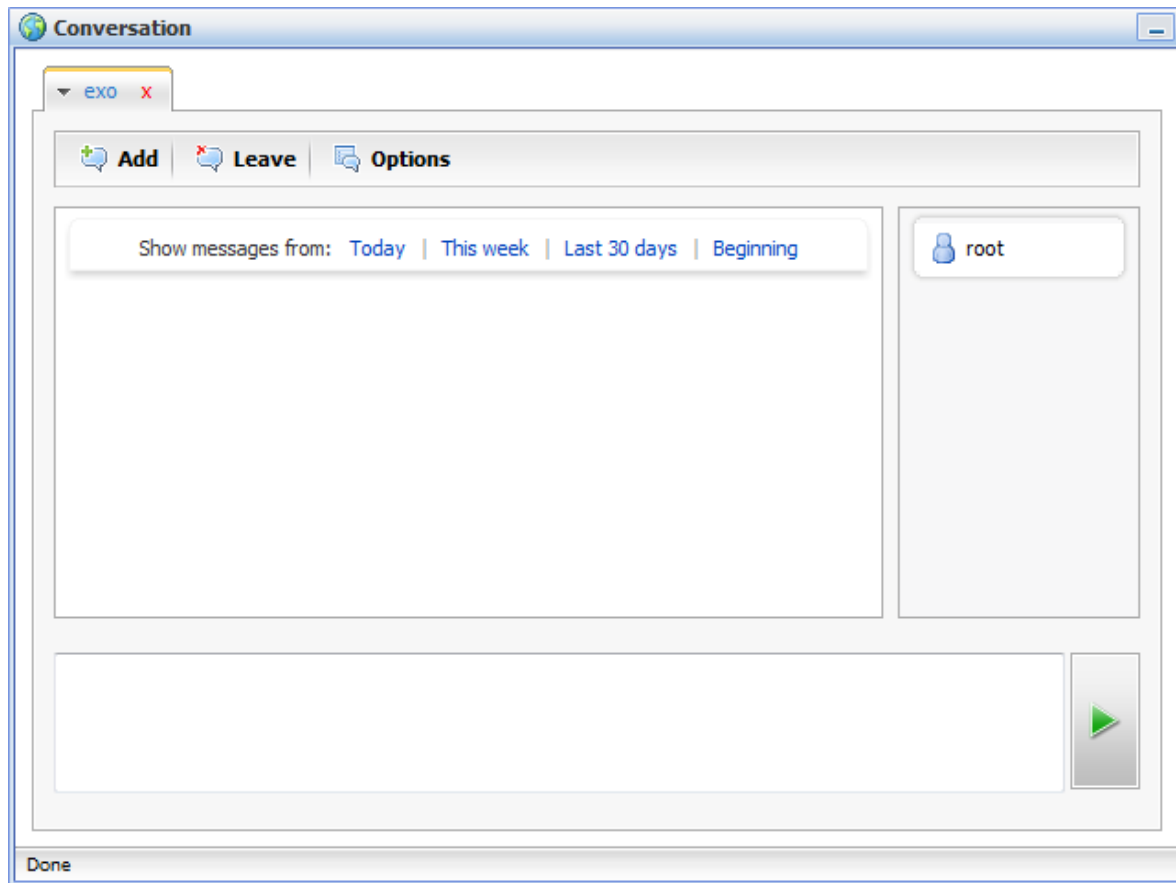


Illustration 70: The Conversation window after joining a room



*You can join several chat rooms at the same time. Each chat room will be displayed in its own tab and you can easily navigate between different rooms.*

## 4.7 Initiate a new text chat

Send messages in Collaboration Chat is as simple as type and click so you will find it easy to start conversation.

- ✓ **To send instant messages, do as follows:**

**Step 1:** Click the contact name you want to chat with in the contact list or join a chat room.

The Conversation window will appear:

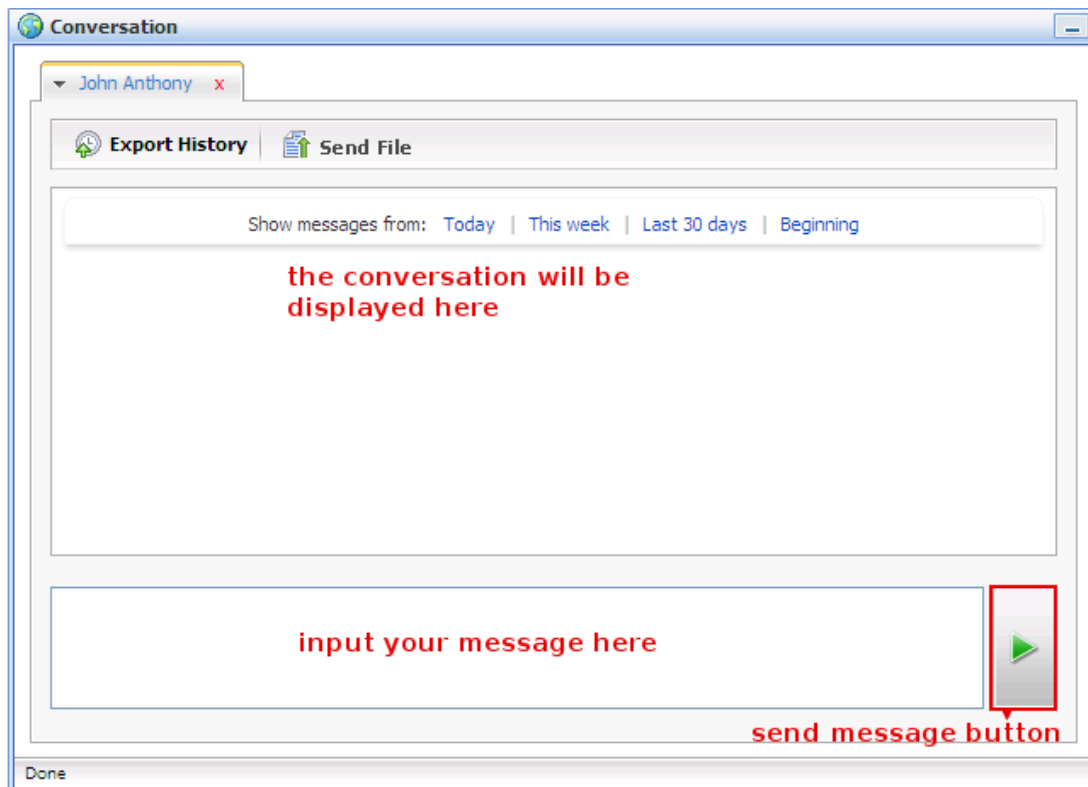
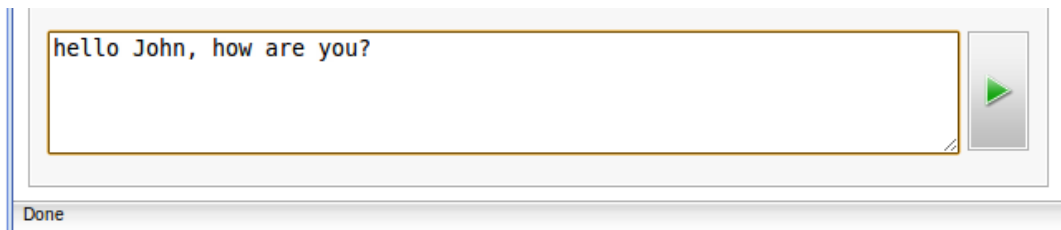



Illustration 71: The Conversation window when starting chat with the other contact

**Step 2:** Type the message that you want to send into the message input box:



**Step 3:** Press the **Enter** key on your keyboard or click the send button (  ).  
The selected contact will receive the message that you have typed in the conversation area.

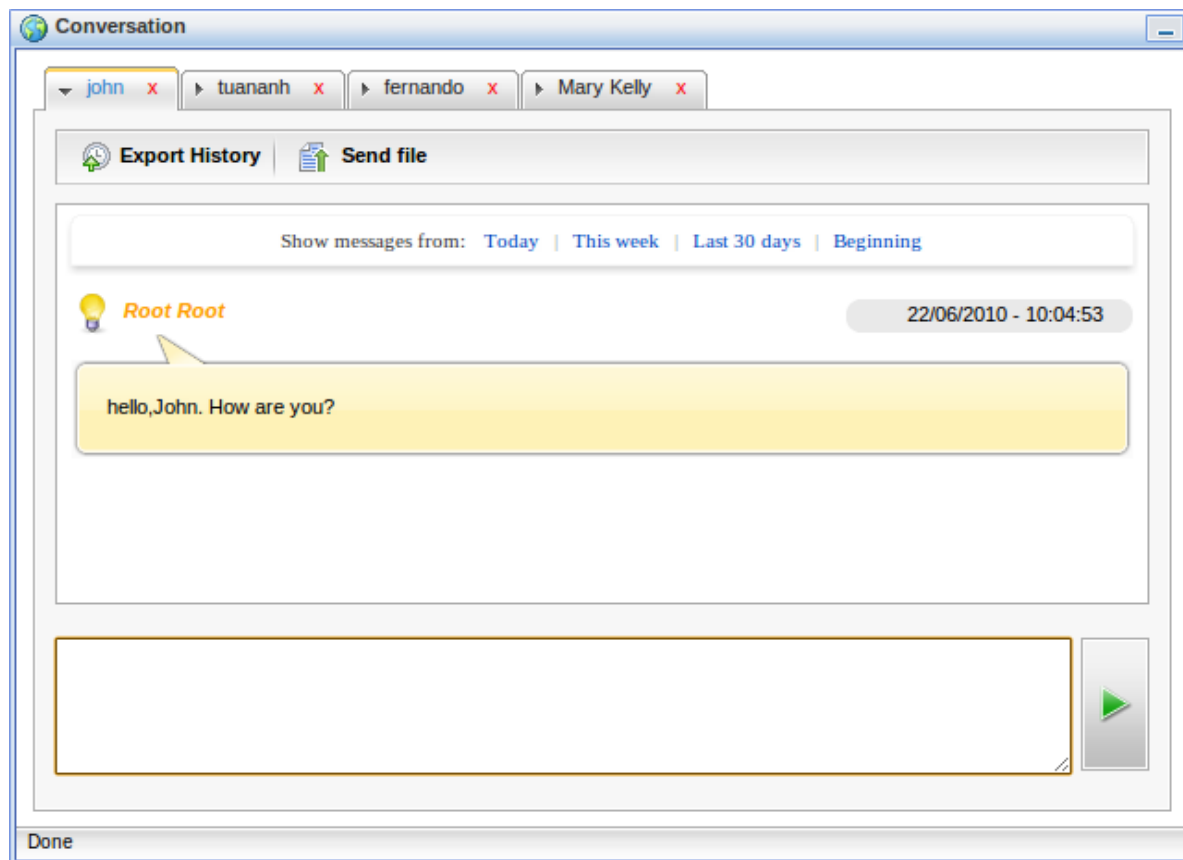




Illustration 72: The Conversation window after sending a instant message

You can click the icon  on the right corner of the Conversation window to minimize this window to the chat bar. To restore the window, click the minimized window  on the chat bar.




*When you send message to offline contacts, whatever information you send to them will be presented to them at the time of their next login.*

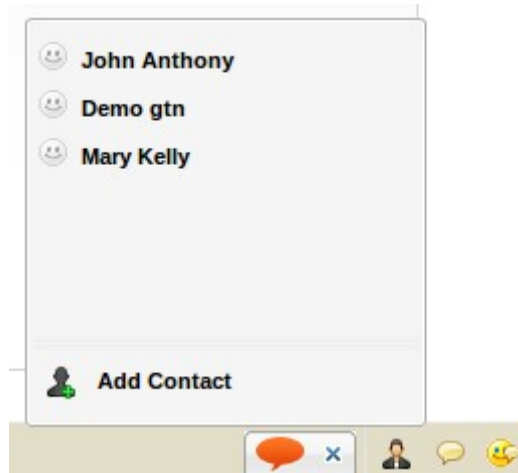
*You can chat with several contacts at the same time. Each conversation is displayed in its own tab. You can switch between tabs to follow different ongoing conversations.*

## 4.8 Add a contact to friend list

This function is used to add a contact into your friend list. You can easily search other contacts in your Collaboration Address Book and add them to your friend list.

- ✓ To add a contact to your friend list, do as follows:

**Step 1:** Click  on the chat bar and click on  **Add Contact** in the pop-up menu.



The **Add Contact** form will appear:

<input type="checkbox"/>	First Name	Last Name	UserName
<input type="checkbox"/>	Demo	gtn	demo
<input type="checkbox"/>	John	Anthony	john
<input type="checkbox"/>	Mary	Kelly	mary

Illustration 73: The Add Contact form

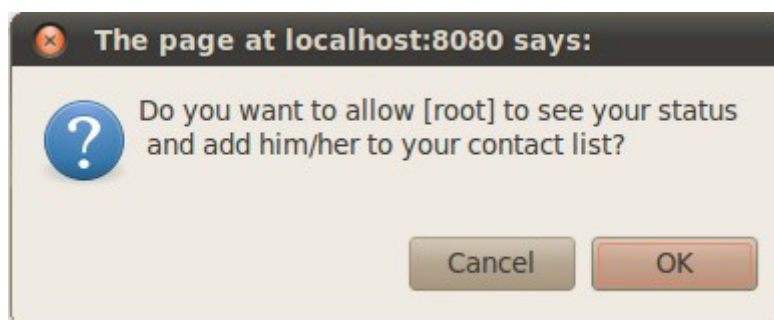
**Step 2:** Select one or more contacts in the account list by selecting the corresponding check boxes. You can also search for specific contact by typing the information related to the contacts you want to search in the search box. All contacts that match with the key words will be shown:



	First Name	Last Name	UserName
<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Demo	gtn	demo

**Step 3:** Click the **Refresh** button to clear the selected contacts or click the **Add contact** button to add contacts into your friend list.

The contact that you want to add, will receive a your request message:



**Step 4:** If he/she accepts, you will receive a confirmation message.




Click **OK** to accept the request .

After adding contacts successfully, the added contacts will be shown in your friends list.

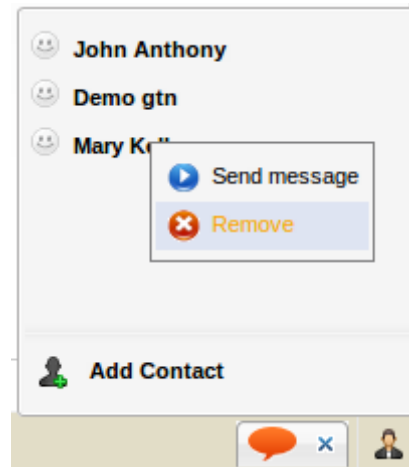
## 4.9 Remove a contact

This function allows you to remove a contact from your friend list.

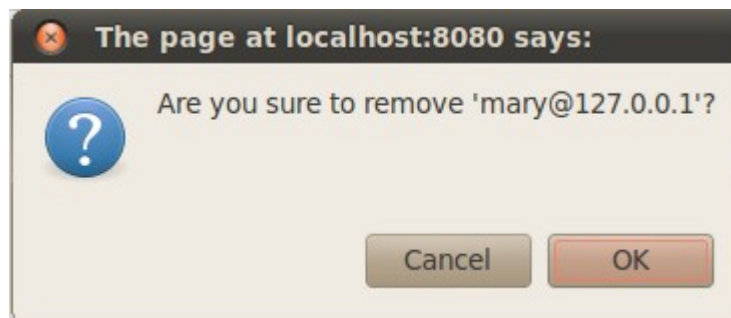
- ✓ To remove a contact, do as follows:

**Step 1:** Click the  **Add Contact** button on the action bar to show your friend list. Right

click on the contact that you want to remove from your friend list and select **Remove** in the pop-up menu:



There will be a confirmation message.




**Step 2:** Click **OK** to accept removing the selected contact or click **Cancel** to quit the message.

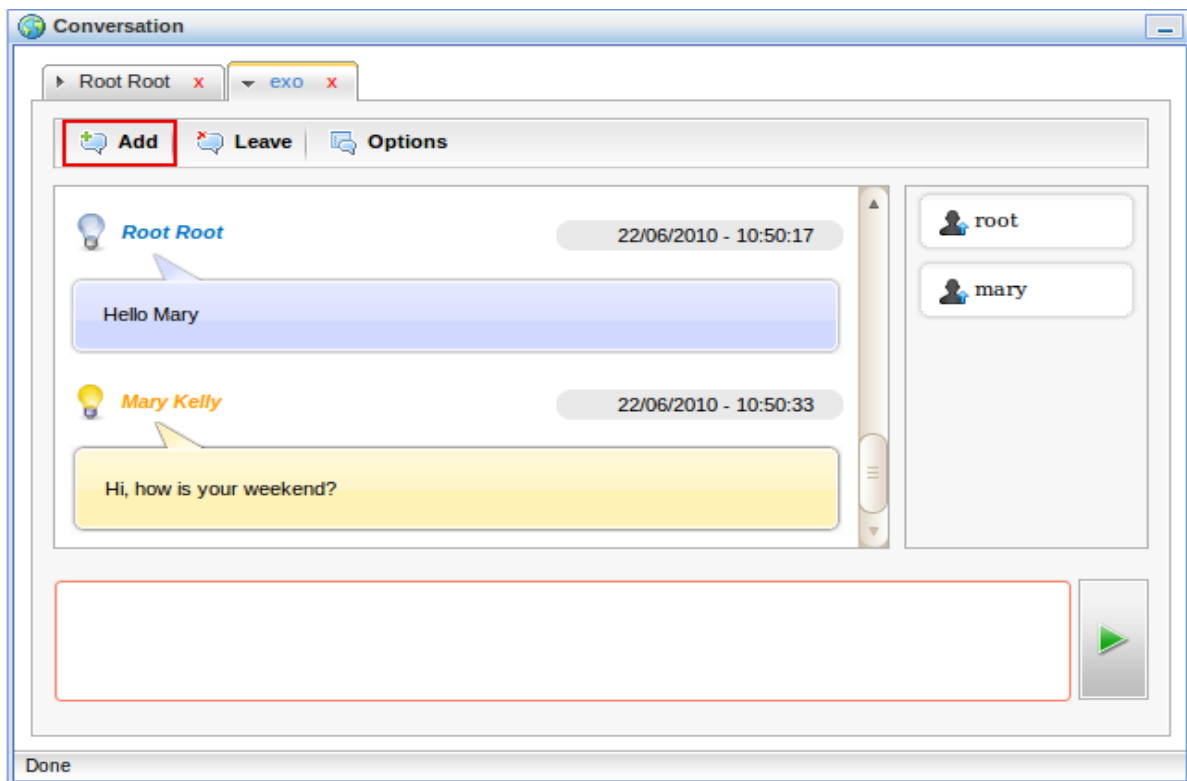
## 4.10 Add contacts to a room

This function is used to add contacts to the chat room where you was already in, so the added contacts will be able to join this room to communicate.

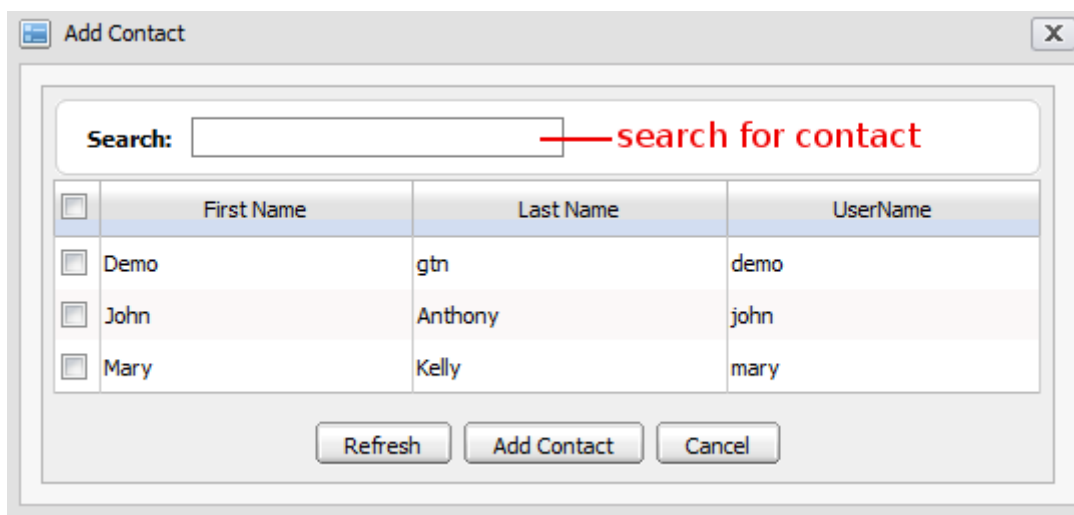
- ✓ **To add contact(s) to a chat room, do as follows:**

**Step 1:** Click the  **Add** button on the room conversation window .

The **Add Contact** form will appear:

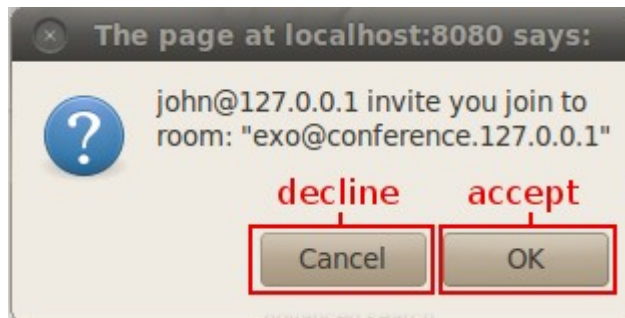


**Step 2:** Select contacts you would like to invite by checking the check boxes corresponding to the contact name. You also can do a quick search to display only the contacts that you want to invite:



Enter information related to the contacts that you want to find in the **Search** text . All contacts that match with the search term will be displayed in a result list.

The contact you want to add will receive a confirmation message like the illustration below:



After joining a chat room, the added contact can start the chat right away.

## 4.11 Leave a chat room

- ✓ To leave a chat room, do as follows:




Click the  **Leave** button on the room conversation window.

Your conversation window of this room will be closed and you will not receive any messages from the chat room.

## 4.12 Room Configuration

This function allows the owner of a room to configure the room's information to meet your needs. As you remember, you have to configure the chat room before you can create one. You are also able to update the room configuration after the chat room was created. If you are not the owner of the chat room, you do not have the permission to perform this action.

- ✓ To configure a chat room, do as follows:

**Step 1:** Click the  **Options** button in the **Conversation** form of the chat room. The **Room Configuration** form will appear.

**Step 2:** Set values for the fields in this form. For the descriptions, see [5.4 Create a new chat room](#).

**Step 3:** Click **OK** to accept the configuration or click **Cancel** to quit.




The chat room configuration is available only if you are the creator of that chat room. You can change the room owner in Room Configuration.

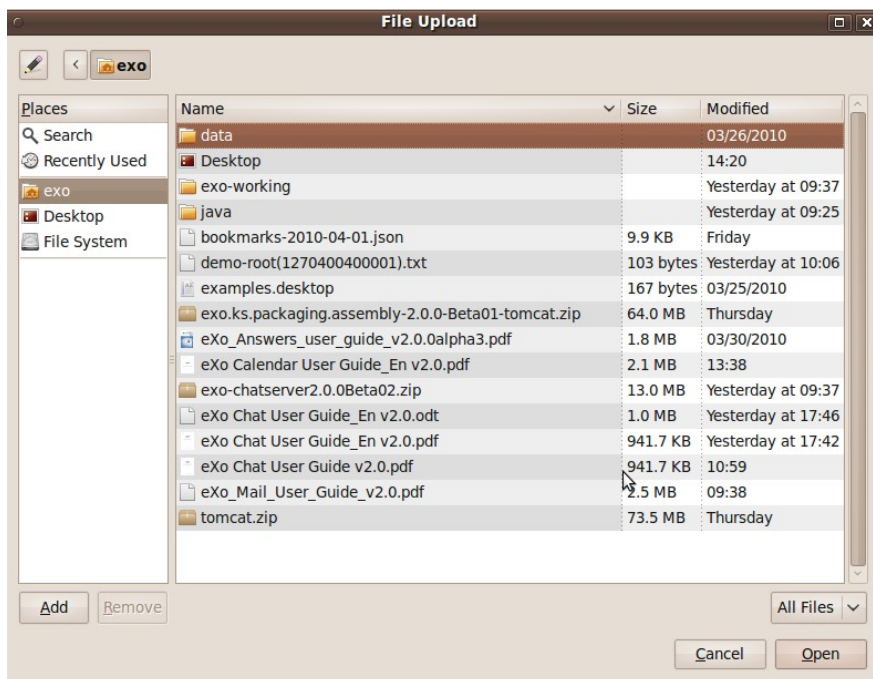
## 4.13 Send files

When you're instant messaging one of your friends on Collaboration Chat, there are times when you want to convey more information to them than you can realistically type in a real-time conversation. Perhaps you want to send them a digital photo of your holiday or documents needed for the coming meeting. Whatever you want your friend to see, Collaboration Chat can send it for you. Follow these steps to find out how.

- ✓ **To send file to a contact, do as follows:**

On the Conversation window, simply click the  **Send File** button in the chat window.

You will be prompted to select a file from your computer to send.



Send a file you want by selecting the file you want to send in the window that appears, clicking on it and then hitting "Open." Your file is now being sent. The receiver will have options to deny or accept the file transfer:



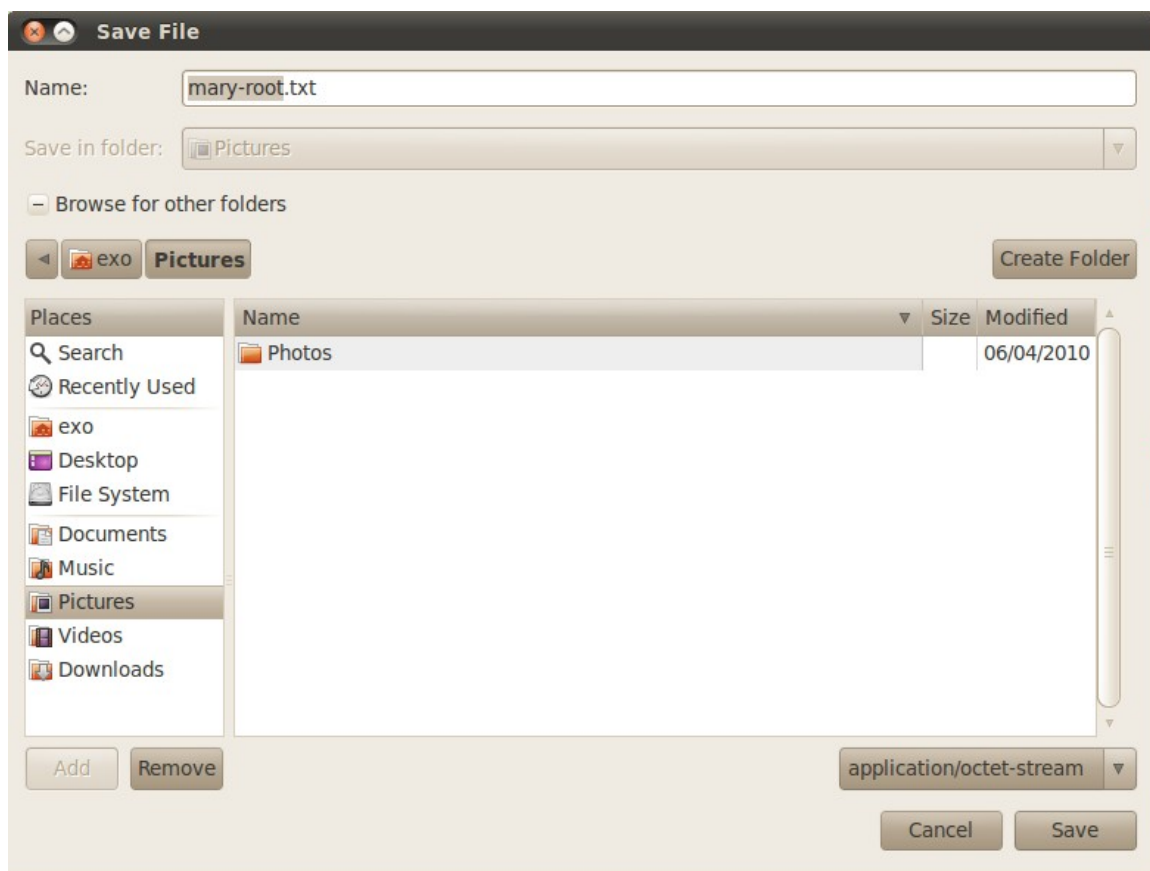
## 4.14 Export a chat history

Chat application can archive your chat and allows you to export and save your conversation history to your computer.

- ✓ To export a chat history, do as follows:

**Step 1:** Click the  **Export History** button on the Conversation window.

The pop up window will appear as below:



**Step 2:** Chose the location to save the file then click **Save** to save the exported file to your local computer or **Cancel** to abort the chat history export.

After exporting the conversation successfully, you will have a text file which log all of your conversation contents.

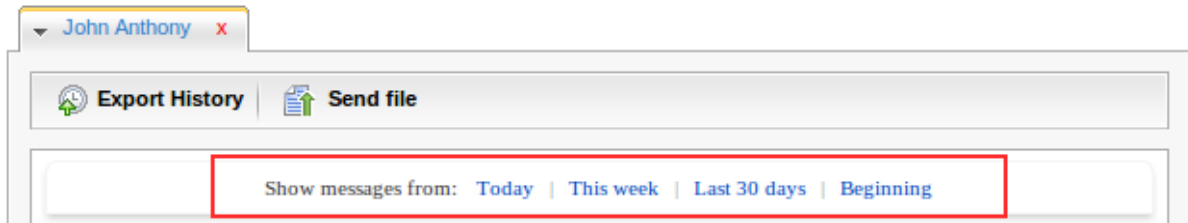
## 4.15 Show messages in a specific time

Your chat messages history can be shown in a specific time interval.: Today, This Week . Do as

follows:

**Step 1:** Select a contact that you want to show the message log.

**Step 2:** Select a time interval in some default time intervals provided in Collaboration Chat:



Details:

Currently, eXo Collaboration Chat show messages in the following time ranges:

- Today: To show all messages of the current date.
- This week: To show all messages of the current week.
- Last 30 days: To show all messages from last 30 days to the current time.
- Beginning: To show all instant messages from the beginning to the current time.

All messages with the created time and date will be shown in the Conversation window.

## 5 Collaboration Mail

### 5.1 Get started

#### 5.1.1 What is eXo Collaboration Mail?

eXo Collaboration Mail is a webmail application of eXo Platform. With the webmail, you can receive your emails whenever and wherever just by using a common web browser such as: Internet Explorer, Firefox or Safari, etc. Mail is smoothly integrated with other Collaboration modules such as Address Book and Calendar. This integration helps you to enhance the quality of group activities.

To go to the Mail portlet, click on the Mail icon  right from the Chat bar:



#### 5.1.2 What you can do with Collaboration Mail?

The Mail application provides many useful features to users as summarized below:

- ✓ User Interface is clean with drag-and-drop and right-click contextual menus.
- ✓ Users can create and use multiple accounts, so different email addresses can be displayed in the same web interface.
- ✓ Message tags will make it easier to find and sort archived content.
- ✓ Filtering function allows users to define rules to contain results as fast as possible.
- ✓ Rich Text Editor provides users with message display and composition.
- ✓ Many standard mail protocols, such as POP3, IMAP, SMTP, SSL are supported.
- ✓ Calendar Integration helps accepting received event invitations in one-click and creating new calendar events without having to leave the inbox.




## 5.2 Account Management

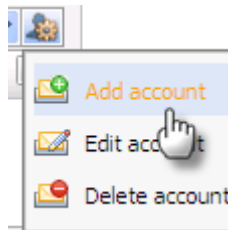
In order to get mails from the other mail service to Mail application of eXo Collaboration, you need to create an account in Mail which connects to your another email account like Gmail. Mail allows you to manage your account such as adding, editing, deleting accounts which may get mails from different mail services at one time.

### 5.2.1 Add an account

The function is used to add an account in Mail through step 1 to step 5.

- ✓ To add an account, do as follows:

Open the **Create a new account** form by clicking the icon  and then click **Add account** in the drop-down menu:



The **Create a new account** form will appear. You will finish adding your account after 5 easy steps:

**Step 1:** This step allows you to add basic information: **Account name** and **Description**.

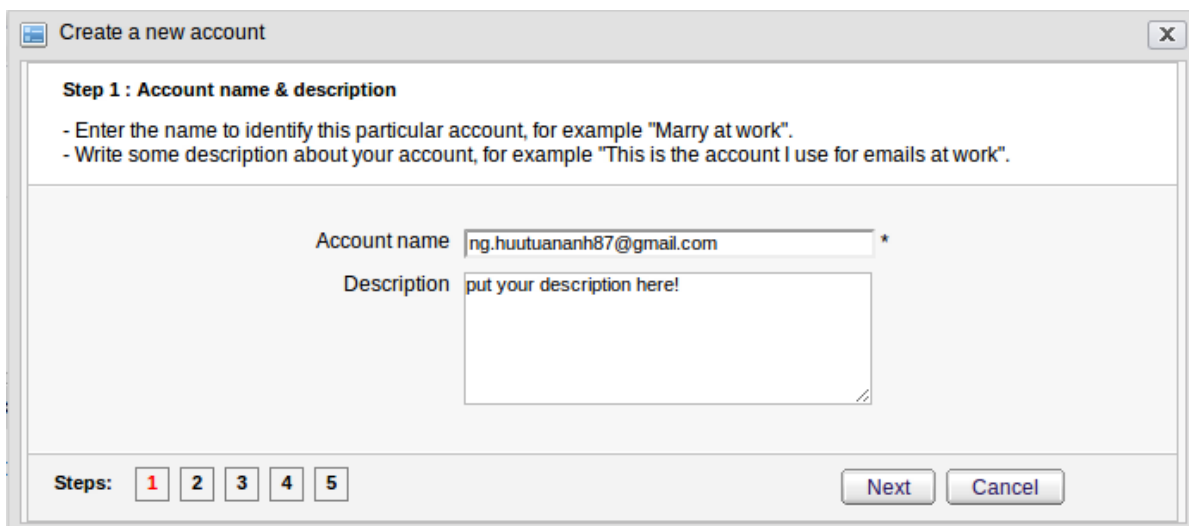
A screenshot of a web application window titled 'Create a new account'. The window has a close button (X) in the top right corner. The main content area is titled 'Step 1 : Account name & description'. Below the title, there are two instructions: '- Enter the name to identify this particular account, for example "Marry at work".' and '- Write some description about your account, for example "This is the account I use for emails at work".' There are two input fields: 'Account name' with the text 'ng.huutuananh87@gmail.com' and a red asterisk, and 'Description' with the placeholder text 'put your description here!'. At the bottom of the window, there is a 'Steps:' section with five numbered buttons (1, 2, 3, 4, 5), where button 1 is highlighted. To the right of the steps are 'Next' and 'Cancel' buttons.

Illustration 74: Step 1: Account name & description

Details:

<b>Account name</b>	The account name which will be displayed in the account list. (Required).
<b>Account description</b>	The account's brief description.

**Step 3:** Click **Next** to go to **Step 2**. The **Mail identify settings** form will be displayed:

**Create a new account**

**Step 2 : Mail identity settings**

- Mail identity is the name and email address used in your email correspondence. Each mail account has an identity, which is the information that identifies you to mail recipients when they receive your mails.

Your display name  \*

Email address  \*

Reply-to address

Signature

Steps: **1** **2** 3 4 5

**Illustration 75: Step 2- Mail Identity settings of the Create a new account form**

Details:

<b>Your display name</b>	The name to be displayed when you use the account. This name will be displayed together with user's email address when the user composes a new message. (Required).
<b>Email address</b>	The email address which corresponds to the account. It must be a correct mail address. (Required).
<b>Reply – to Address</b>	The email address that will receive all replies. (Not required).
<b>Signature</b>	The signature texts which are automatically inserted at the bottom of every message you send.

**Step 4:** Click **Next** or the number **3** to go to the **Step 3**. The **Server information** form is displayed.

**Create a new account**

**Step 3 : Server information**

- Select the type of mail service you are using.
- Enter the incoming and outgoing mail server, for example: mail.yourcompany.com
- If in doubt, ask your system administrator.

Service type:

Incoming mail server:  \*

Use incoming SSL: ☒

Outgoing mail server:  \*

Use outgoing SSL: ☒

Steps: 1 2 3 4 5 Back Next Cancel

**Illustration 76: Step 3 – Server information of the Create a new account form**

Details:

<b>Server Type</b>	Type of the mail server. There are two choices: POP3 (Post Office Protocol version 3) is a protocol to get email from a remote server or IMAP (Internet Message Access Protocol) which retrieves e-mail from a remote server over a TCP/IP connection. By default, 'pop3' is selected.
<b>Incoming mail server</b>	The incoming mail server of the email provider which you are using. In order to properly use, users need to configure this field. Each email provider has different incoming mail server. By default, the value of this field is 'pop.gmail.com'.
<b>Use incoming SSL</b>	The option allows using SSL (Secure Sockets Layer) or not. SSL is cryptographic protocol which provides secure communication on Internet such as web browsing, email, Internet faxing, etc. Incoming SLL allows using SSL to check incoming emails.
<b>Outgoing mail server</b>	The outgoing mail server of the email provider that corresponds to the incoming mail server. By default, the value of this field is 'smtp.gmail.com'.
<b>Use outgoing SSL</b>	This option is to use SSL to send mail in the Mail portlet.

**Step 5:** Click **Next** to go to **Step 4**. The Create a new account form is displayed:

**Create a new account**

**Step 4 : User name & password**

- Enter user name and password to connect on the mail server.

User name  \*

Password  \*

Save password ☒

Do not download all messages (IMAP only) ☒

Limit to messages arrived since

Steps: **1** 2 3 4 5

Back Next Cancel

**Illustration 77: Step 4- User name & password of the Create a new account form**

Details:

<b>User Name</b>	The email address which is used in Mail without logging in directly. (*Required).
<b>Password</b>	The password that corresponds to the email address in 'User name'. It will be used to archive your mail in 'User name' as you use it to sign in your mail. (*Required).
<b>Save password</b>	The option allows saving password or not. If this option is checked, each time when you check mails, you needn't enter a password again. If this option is not checked, there will be a message that requires you to enter your password anytime you check mail.
<b>Do not download all messages (IMAP only)</b>	The option allows checking mail from Image only or not.
<b>Limit to messages arrived since</b>	The date since then the emails are gotten.

**Step 6:** Click **Next** to go to **Step 5**, the **Verifying information** form is displayed:

**Create a new account**

**Step 5 : Verify information**

- Verify that the information below is correct before saving and exiting this wizard.

Account name ng.huutuananh87@gmail.com  
 Your display name Anh Nguyen  
 Email address ng.huutuananh87@gmail.com  
 Incoming mail server imap.gmail.com  
 Service type imap  
 New messages will be fetched from Inbox  
 Start downloading messages now ☒

Steps: 1 2 3 4 5

Back Finish Cancel

Illustration 78: Step 5- Verify information of the Create a new account form

The form will display all information you have inputted. In this step, you have to verify the information is correct.

Details:

**Start downloading messages now:**

The option allows getting messages automatically right after finishing creating a new account like the figure below. Otherwise, you have to do it manually.

**Step 7:** Click **Finish** to complete creating a new account, click **Back** to return to the previous step or **Cancel** to cancel creating a new account.


All your emails will be fetch automatically right after you created a new account if **Start downloading messages now** is checked.

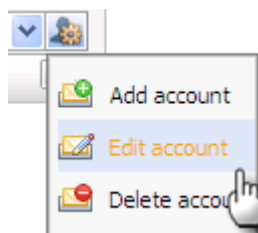
More actions View as Filter					
	Subject	Sender	Date & Time	Size	
1	[eXo Internal wiki] eXo Platform Product > DOC Sprints	wiki-int@exoplatform.org	Thu Oct 28 16:2	6.25 KB	
1	[JIRA] Created: (REL-635) PLF trial package	Philippe Aristote (JIRA)	Thu Oct 28 15:3	12.77 KB	
1	[exo-vn] Shoud not cut off A/C in M7	Long Viet	Thu Oct 28 14:0	7.43 KB	
1	Fwd: [exo-vn] Presentation about eXo fundamentals by Sören Schmidt on Tuesday 2	Aristote Philippe	Thu Oct 28 13:4	11.31 KB	
1	[exo-vn] Presentation about eXo fundamentals by Sören Schmidt on Tuesday 2 Nover	Long Viet	Thu Oct 28 13:3	12.77 KB	
1	[exo-vn] Presentation about JBoss Application Server - Administration by Julien	Long Viet	Thu Oct 28 13:3	12.00 KB	
1	[JIRA] Assigned: (DOC-419) Update document for CS 2.1.1	Nguyen Huu Tuan Anh (JIRA)	Thu Oct 28 09:2	12.59 KB	
1	ISMBINCOL Maintenance at 0PM CET - Jira News Update	Arnaud Héritier	Thu Oct 28 01:4	8.43 KB	


## 5.2.2 Edit account details

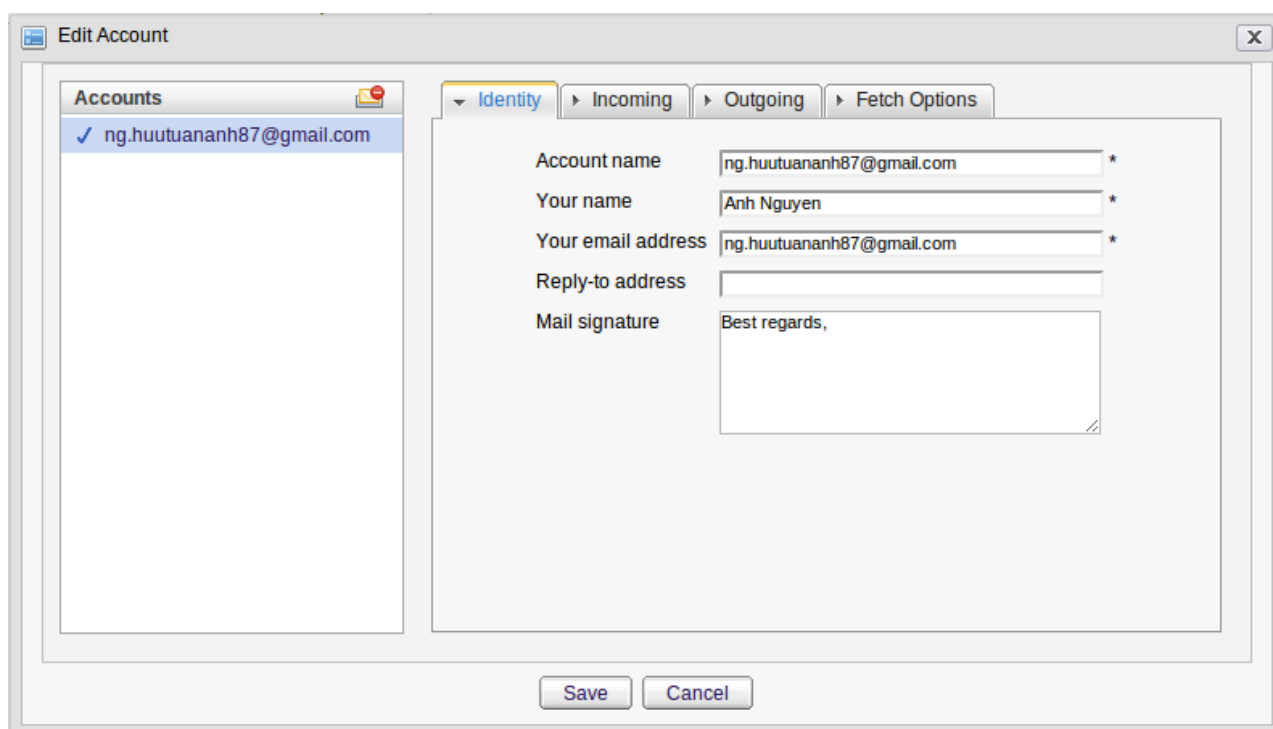
The function allows making changes to existing mail accounts. Do as follows:

**Step 1:** Open the **Edit account** form by two ways:

**The 1<sup>st</sup> way:** Open the **Edit Account** form by  clicking the icon on the left panel and select the **Edit account** item:



**The 2<sup>nd</sup> way:** Open the **Edit Account** form by clicking the icon  **Accounts** on the toolbar. The **Edit Account** form will appear:

A screenshot of a web application window titled 'Edit Account'. On the left, there is a list of accounts under the heading 'Accounts', with one account 'ng.huutuananh87@gmail.com' selected and marked with a checkmark. The main area of the window has several tabs: 'Identity' (selected), 'Incoming', 'Outgoing', and 'Fetch Options'. The 'Identity' tab contains several input fields: 'Account name' (filled with 'ng.huutuananh87@gmail.com'), 'Your name' (filled with 'Anh Nguyen'), 'Your email address' (filled with 'ng.huutuananh87@gmail.com'), 'Reply-to address' (empty), and 'Mail signature' (filled with 'Best regards,' in a text area). At the bottom of the form are 'Save' and 'Cancel' buttons.

**Illustration 79: The Identity tab of the Edit Account form**

The Identity tab contains basic information of the account such as account name, your name, your email address, reply-to address, mail signature, etc.

- The **Incoming** tab: contains some incoming settings information used to check/receive mails such as Server type, Sever name, Port, User name, Password.

The screenshot shows the 'Edit Account' dialog box with the 'Incoming' tab selected. On the left, a list of accounts shows 'ng.huutuananh87@gmail.com' with a checkmark. The main area contains the following fields and options:

- Service type: imap (dropdown)
- Server name: imap.gmail.com \*
- Port: 993 \*
- User name: ng.huutuananh87@gmail.com \*
- Password: \*\*\*\*\* \*
- ☒ Remember password
- ☒ Use secure authentication (SSL)

At the bottom are 'Save' and 'Cancel' buttons.

Illustration 80: The Incoming tab of the Edit Account form

- The **Outgoing** tab: contains some outgoing information used to send emails such as **Server name**, **Port**.

The screenshot shows the 'Edit Account' dialog box with the 'Outgoing' tab selected. On the left, the same account list is visible. The main area contains the following fields and options:

- Server name: smtp.gmail.com \*
- Port: 465 \*
- ☒ Use secure authentication (SSL)
- ☒ Enable SMTP authentication
- ☒ Use incoming server username/password
- Username: ng.huutuananh87@gmail.com \*
- Password: \*\*\*\*\* \*

At the bottom are 'Save' and 'Cancel' buttons.

Illustration 81: The Outgoing tab of the Edit Account form

When the **Enable SMTP authentication** is selected, other related field that allows defining the user name and password of the email used for sending mail will appear. If the **Use incoming server username/password** check box is selected, the incoming email address and its password are displayed and disabled. If the check box is not selected, the incoming email can be manually inputted.

- The **Fetch Options** tab: contains some advanced options to customize the way you want to check mail, the default folder to receive mail, etc.

**Illustration 82: The Fetch Options tab of the Edit Account form**

Details:

<b>Check mails automatically</b>	The option allows checking a mail automatically. You don not have to click the <b>Get email</b> button on the tool bar to fetch emails.
<b>Leave message on server</b>	The option allows leaving mails on server after checking mails or getting and deleting them on server. This option is for pop3 Server type only. In case the IMAP server type is used, it it will message as delete with the similar meaning.
<b>Do not download all messages</b>	Limit downloaded messages before a specific date time.
<b>Custom Inbox folder</b>	This option allows customizing the folder containing the arrived emails. By default, it is the <b>Inbox</b> folder.

**Step 2:** After you finish editing your account information, click **Save** to accept changes or **Cancel** to cancel the changes.



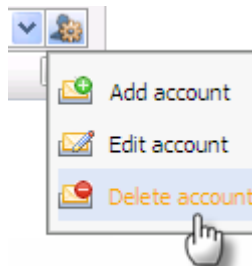
### 5.2.3 Delete an account

If you use multiple accounts then this function is useful to delete an account from your account list. There are two ways to perform this action:

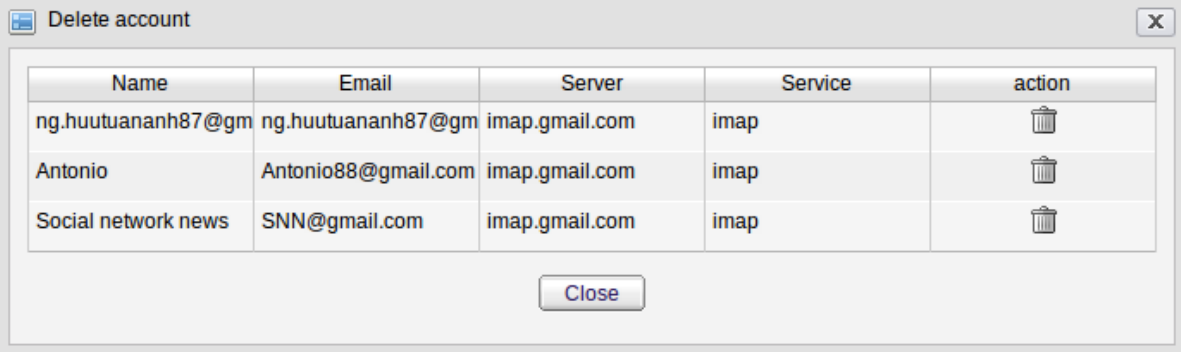
**The 1<sup>st</sup> ways:**




**Step 1:** Select an account that you want to delete from the account list then click the icon

 on the left panel and then click **Delete account** :




The **Delete account** form will appear:




Name	Email	Server	Service	action
ng.huutuananh87@gm	ng.huutuananh87@gm	imap.gmail.com	imap	
Antonio	Antonio88@gmail.com	imap.gmail.com	imap	
Social network news	SNN@gmail.com	imap.gmail.com	imap	



[Close](#)

Illustration 83: The Delete account form

**Step 2:** Click the **Trash** icon  corresponding to the account that you want to delete and click **OK** to confirm deleting.

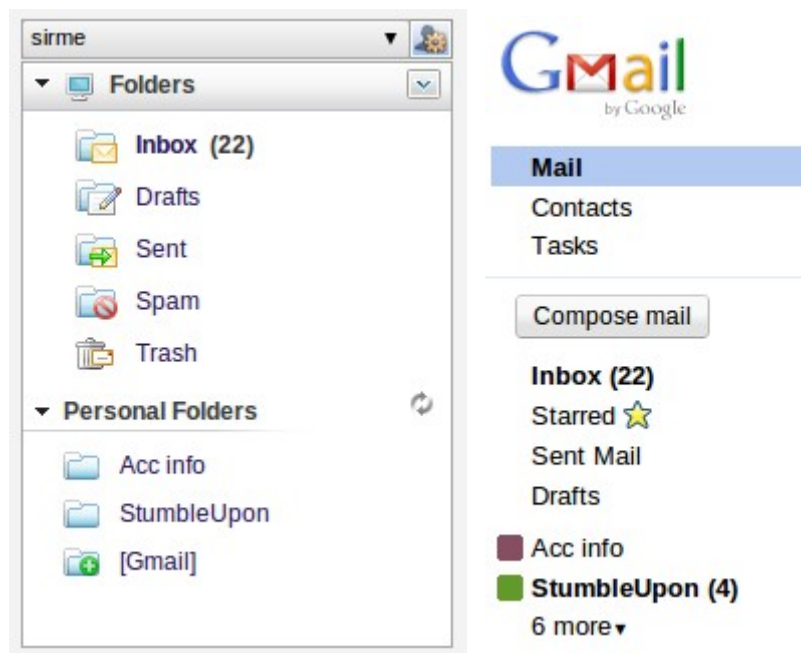
**The 2<sup>nd</sup> way:** You also can delete an account from the **Edit Account** form:

**Step 1:** Click the icon  on the left panel and then select the **Edit Account**. The **Edit Account** form will appear with the account list in the left panel.

**Step 2:** Select the account that you want to delete from the account list ( selected account will be marked by the icon  ) then click  to delete the selected account.

## 5.3 Folder Management

Folder helps you manage your messages more easily and flexibly. There are some default folders generated automatically after creating a new account: Inbox, Drafts, Sent, Spam, Trash and Personal Folders list. You personal folders are synchronized with the email server.



Details:

<b>Inbox</b>	This folder stores all incoming messages.
<b>Drafts</b>	This folder stores all messages which have been composed but not been sent yet.
<b>Sent</b>	This folder stores all sent messages.
<b>Spam</b>	This folder stores all messages suspected of being unwanted messages.
<b>Trash</b>	This folder stores all deleted messages.
<b>Personal Folders</b>	The list of the personal folders which corresponds to the created folders in the sever mail box.

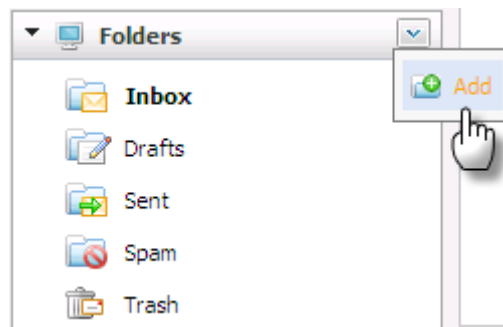
### 5.3.1 Add a new folder

The function is used to add a new folder in Mail.

- ✓ To add a new folder, do as follows:

**Step 1:** Open the **Add a new folder** form by clicking the arrow icon  on the **Folders**

bar and then select **Add** in the pop-up list:



The **Add a new folder** form will appear:

A screenshot of a small dialog box titled 'Add'. It contains a text input field labeled 'Folder name' with the text 'eXo news' entered. Below the input field are two buttons: 'Save' and 'Cancel'. The dialog box has a close button (X) in the top right corner.

**Step 2:** Type a **Folder name** then complete adding a new folder by clicking **Save**.



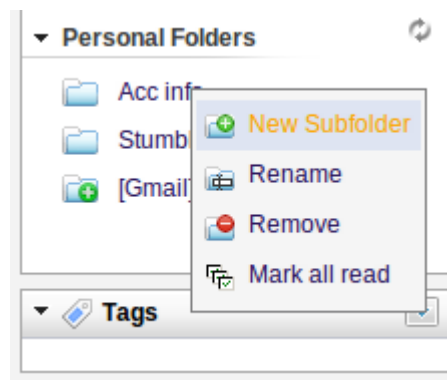
*The created folder will be saved and displayed in the Personal Folders section.*

### 5.3.2 Add a new sub-folder

The function is used to create new sub folders in a folder. You can only add new folders, personal folders except for the default folders (Inbox, Drafts, Sent, Spam, Trash).

✓ **To add a new sub-folder, do as follows:**

**Step 1:** Right-click the created folder that you want to add to and then select **New Sub-folder** in the pop-up list:



The **Add a new folder** form will appear.

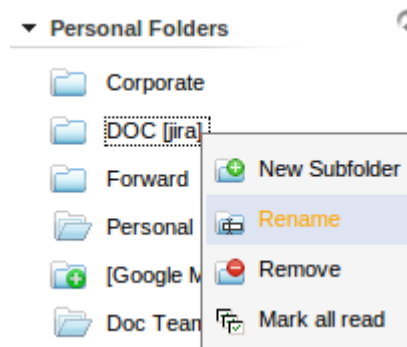
**Step 2:** Type a **Folder name** and click **Save** to finish.

### 5.3.3 Rename a folder

The function is used to change the folder's name. You can change names of all your personal folders which are created by yourself except the default ones.

- ✓ **To rename a folder, do as follows:**

**Step 1:** Right-click the folder which you want to rename and click **Rename** in the drop-down menu.



The **Rename folder** form will appear:

A screenshot of the 'Rename folder' dialog box. It has a title bar with a close button (X). Inside, it shows 'Current name DOC [jira]'. Below that is a label 'New folder name' followed by a text input field. At the bottom are two buttons: 'Save' and 'Cancel'.

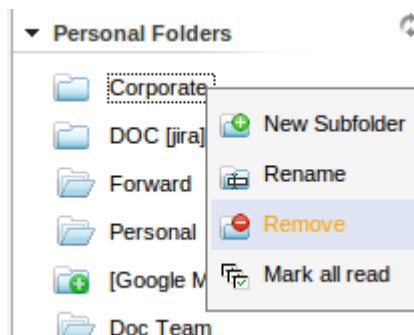
**Step 2:** Type a new name then click **Save** to finish.

### 5.3.4 Remove a folder

The function is used to remove a folder from your Personal Folders. When a folder is removed, its sub-folders are also removed.

- ✓ **To remove a folder, do as follows:**

**Step 1:** Right-click the folder that you want to remove and click **Remove** in the menu:

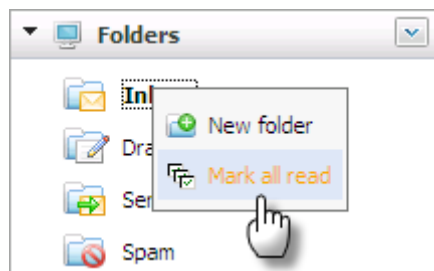


**Step 2:** Click **OK** in the confirmation message to confirm deleting.

### 5.3.5 Mark all messages as read

The function is used to mark all messages in a specific folder (default and personal folders) as read.

To take this action, right-click the folder that you want to mark as read and click **Mark all read** in the menu:



After being marked all as read, all unread messages inside the folder will be marked as read. All unread messages are changed from bold to normal font.


## 5.4 Mail Management

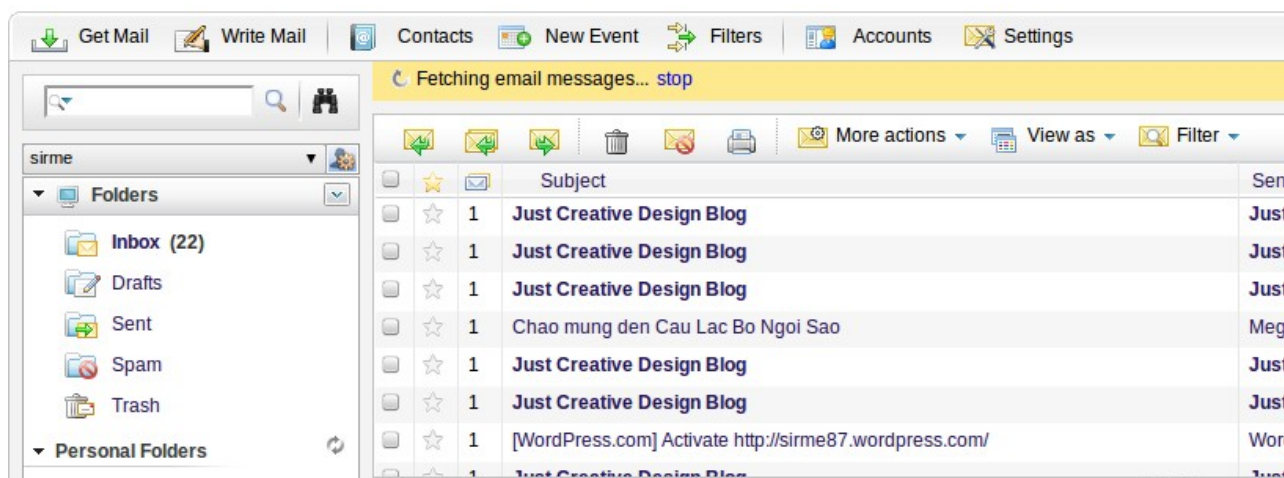
### 5.4.1 Get mails

This function is used to fetch incoming messages from the server.

- ✓ To check mail, do as follows:

**Step 1:** Click the folder that you want to check mail. If no folder is selected, the default folder that will be checked for new messages is the **Inbox** folder.

**Step 2:** Click the button  **Get Mail** in the toolbar. There will be an notification message with the content 'Fetching email messages'. You can click **Stop** to stop complete fetching. All arrived mails will be shown in the message list panel. Click the **Refresh** if you want to refresh fetching mails.





If you select **Check mails automatically** in your Fetch options then mail fetching will be performed automatically. See [here](#) to know how to configure the mail fetching.

## 5.4.2 Compose a message

This function is used to compose a new message.

- ✓ To start composing a message, do as follows:

**Step 1:** Click the button  on the toolbar to compose a message.

The **Compose a new message** form will appear:

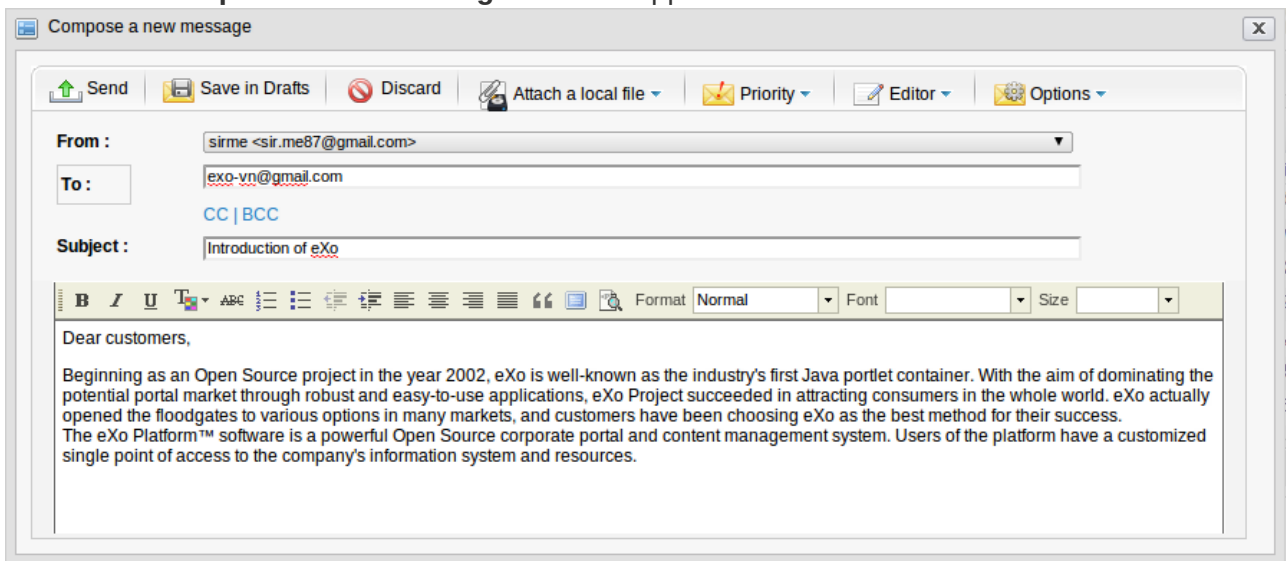
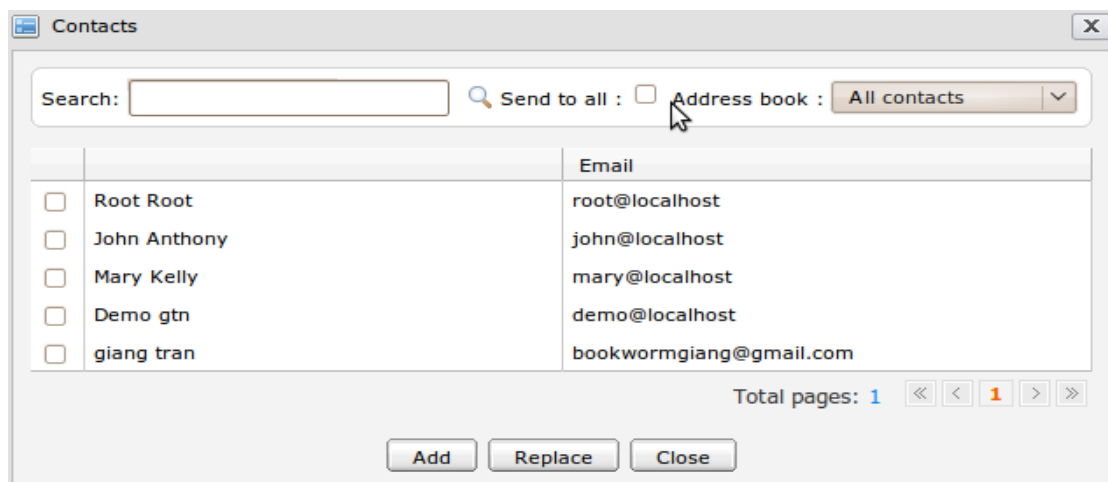


Illustration 84: The Compose a new message form

**Step 2:** Compose the message content.

Click the **To** button to open the **Contacts** form:

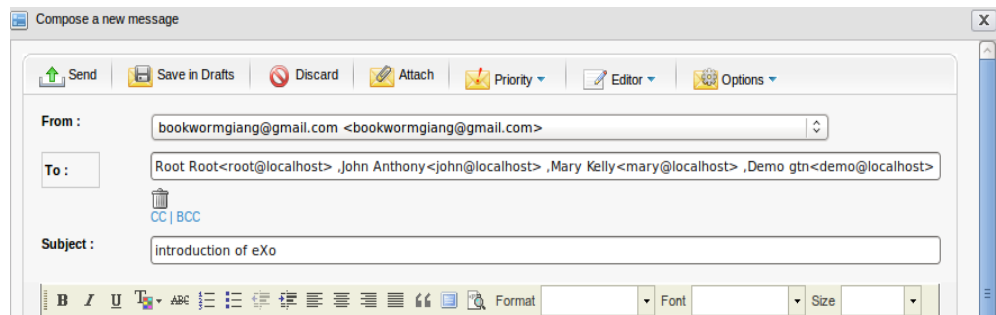


	Email
<input type="checkbox"/> Root Root	root@localhost
<input type="checkbox"/> John Anthony	john@localhost
<input type="checkbox"/> Mary Kelly	mary@localhost
<input type="checkbox"/> Demo gtn	demo@localhost
<input type="checkbox"/> giang tran	bookwormgiang@gmail.com

Illustration 85: The Select email form

Select the desired emails by checking their corresponding checkboxes. You can search for email addresses by typing the contact name in the search box. You also can choose a specific Address book to search by selecting an address book from the list.

Select **Send to all** option also if you would like to send mail to All contacts or specific groups. To do this, select your expected group in the address drop list, tick the **Send to all** check box and click the **Add** button.



If you don't want to send mail to any added group, you can click the delete icon corresponding to that group to remove.

Click the **Add** button to add the selected email addresses to 'To' field, click the **Replace** button to replace the current email addresses in the 'To' field with the new selected email addresses or click **Cancel** to quit.

Besides, the auto-complete allows filtering and listing the receiver's email addresses when you type the contact address.

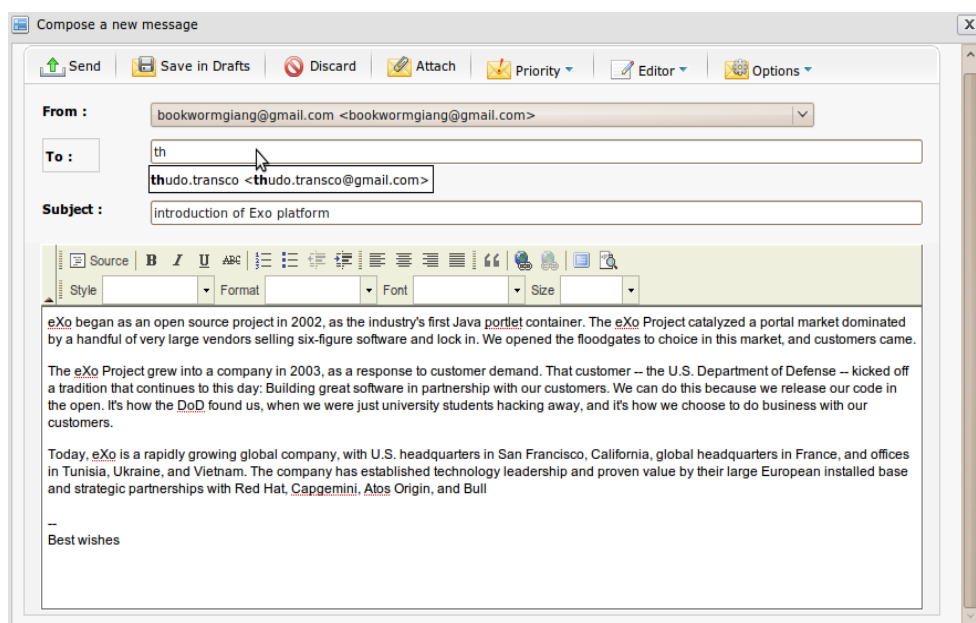
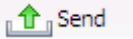
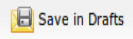

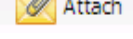


Illustration 86: The address list of the auto complete contact function

Details:

<b>Browse button</b>	<b>Subject</b>	The message's subject. A brief information about your email content
<b>CC BCC</b>	<b>CC   BCC</b>	You can use CC and BCC to send mail to more than one person easily and fast. The CC mails are public, all receivers can know to whom the mail is sent while the BCC mails are private to the sender and the BCC receivers. Using ' BCC' when you want 'To' and 'CC' users also receive this mail but do not know that you also send this email to others. Similarly, the receivers for 'CC' and 'BCC' fields can be selected from the <b>Select Address</b> form when you click <b>CC</b> or <b>BB</b> .
	 <b>Send</b>	To send the composed message
	 <b>Save in Drafts</b>	To save the composed message as a draft. Draft mail will be stored in <b>Draft</b> folder.
	 <b>Discard</b>	To exit the <b>Compose a message</b> form.
	 <b>Attach</b>	To attach a file to the composed message. ( See the attach file below)

The **Attach files** form is like below:

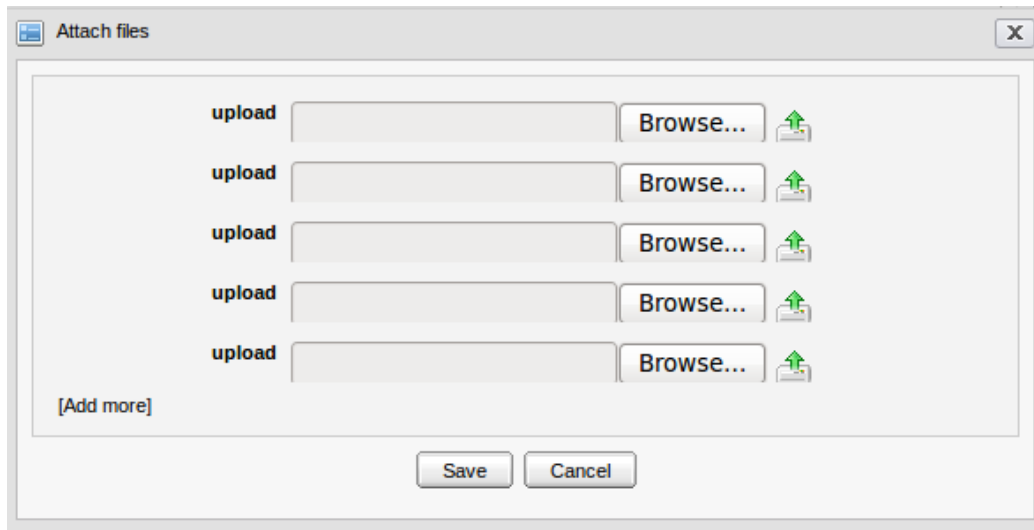




Illustration 87: Attach File form


Details:


<b>Browse button</b>	To select a file from your local computer.
	To upload the selected file.
<b>[Add more]</b>	To attach more files.

After being attached files, the attached files will be shown like below:




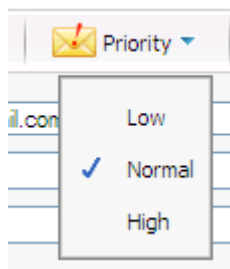
upload 21\_05\_10\_Annual\_Leave\_Announcement.pdf 


upload A level manual (EN).doc 

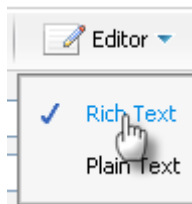
To remove the attached files, click the trash icon  corresponding to the attachment that you want to delete. If the attachment's check box is selected, it means the message will be sent with the selected attachment.


#### Set priority level for a message:

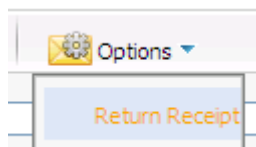
Click  Priority ▼ to set priority level for the composed message. There are three levels : Low, Normal and High. The message is sent with **High** priority that will be marked by the "!" icon in red. The message is sent with the **Low** priority will be marked by the "!" icon in gray. By default, the message is sent with the **Normal** priority.



 Editor ▼ : To change the text editor between Rich text and Plain text. With the Rich text editor, the message content can be composed with many format effects such as font style, color, size, etc. With the Plain text editor, the message can be composed with simple text only.



 Options ▼ : Currently, you only have the Return Receipt option that allows the sender to receive a notification mail to inform that the receiver already read your message. However, the sender only receives the notification in case the mail box of the receivers has



been configured in the Setting that allows notifying to the sender about the read message.


**Step 3:** Complete sending a mail by clicking the **Send Mail** button.

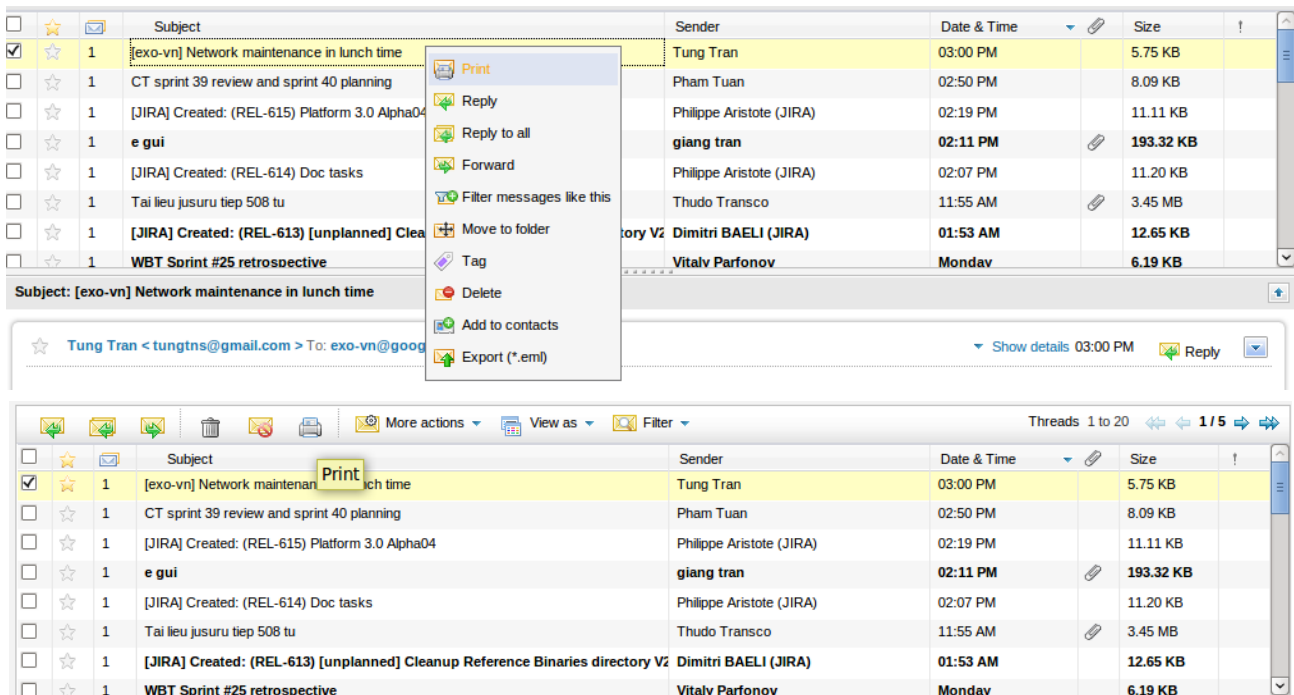


*After sending a mail, the sent mail will be saved in the **Sent** box. In case the receipt emails do not exist in the your Address Book, they will be added automatically to the **Collected Address** in the **Contact** portlet.*

### 5.4.3 Print

This function is used to print a specific message in the mail list.

**Step 1:** Right-click the message which you want to print and click **Print** in the menu. You also can select messages in the message list then click **Print** icon  on the action bar.



The Print preview form will be displayed with detail information available for printing:

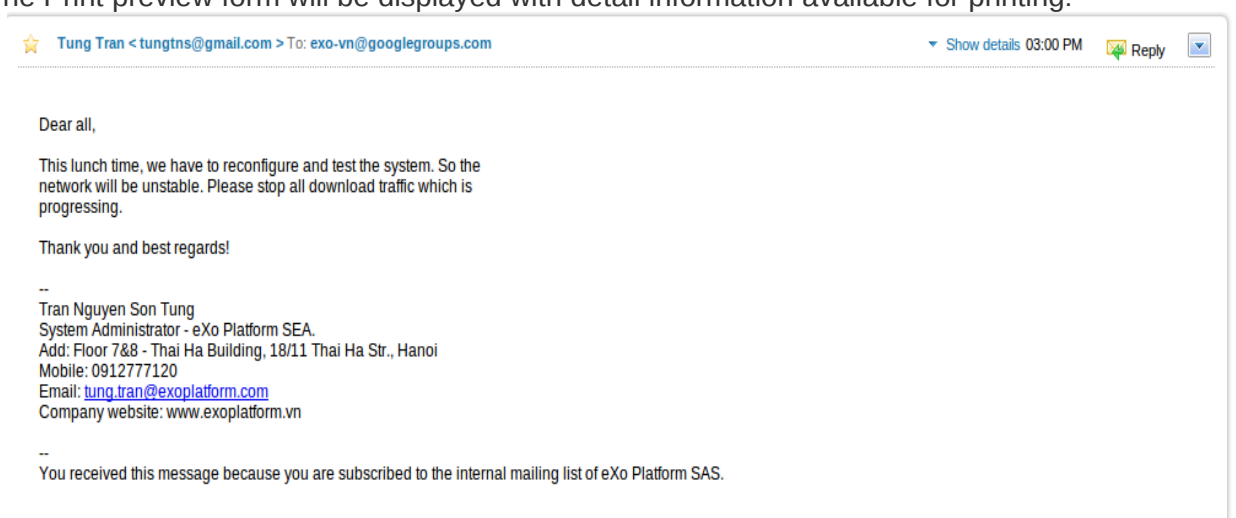
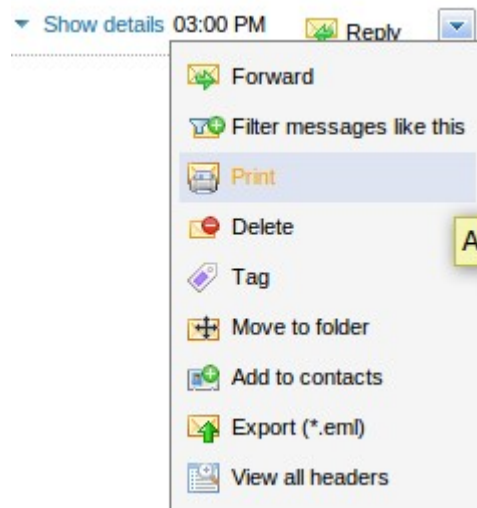


Illustration 88: The Print preview form

✓ To print a opened message:

Click the icon  at the right corner of message's content and click **Print** in the menu;




Click **Print** to accept printing or **Close** to quit the print preview form,

#### 5.4.4 Reply a message

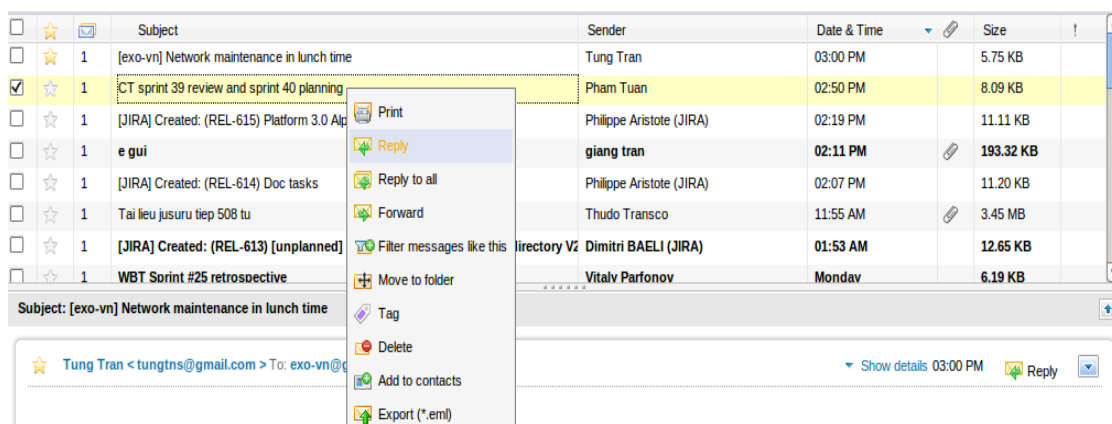
- ✓ To reply a message, do as follows:

**Step 1:** Open the **Reply** form by three ways:

**The 1<sup>st</sup> way:** Select the messages in list that you want to answer by selecting its check box(es) and then click the icon  in the action bar :



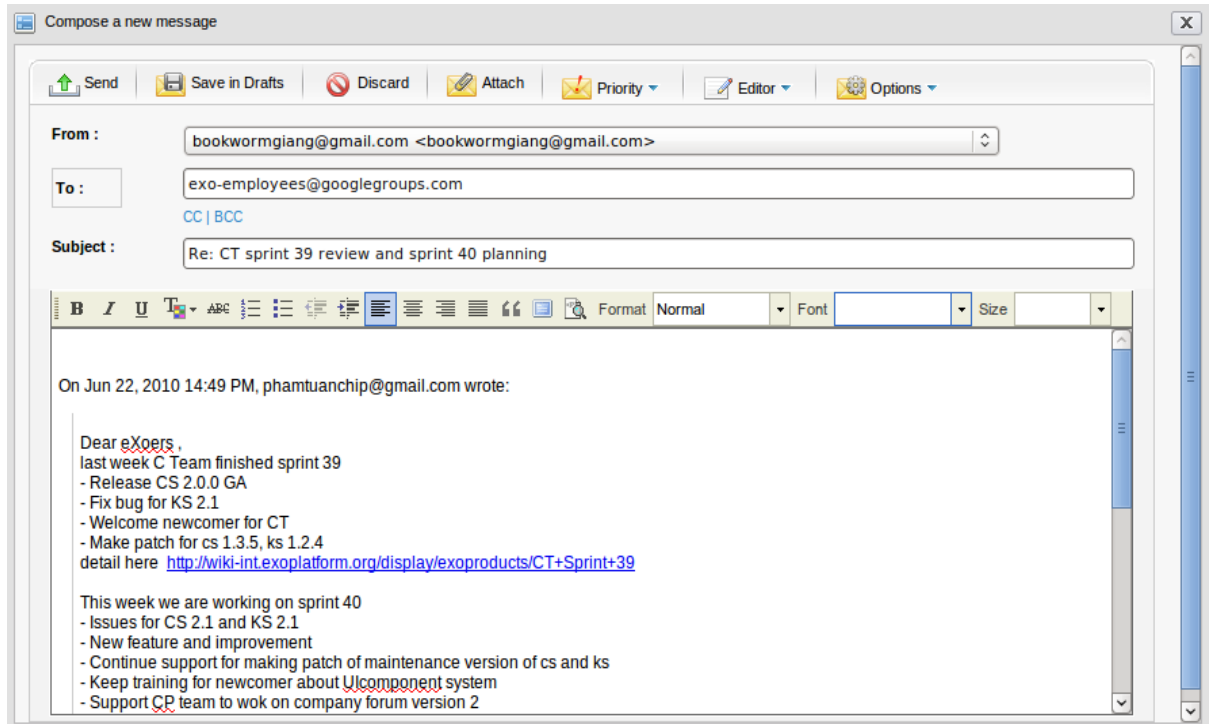
**The 2<sup>nd</sup> way:** Right-click the message you want to reply and select the **Reply** item in the drop-down menu:



**The 3<sup>rd</sup> way:** Open the message that you want to reply by clicking the message's name.

Then, select the icon  **Reply** upper the message's content.

The Reply form will appear in form of the **Compose a new message** with detailed information, available for replying to the sender.



Compose a new message

Send Save in Drafts Discard Attach Priority Editor Options

From: bookwormgiang@gmail.com <bookwormgiang@gmail.com>

To: exo-employees@googlegroups.com  
CC | BCC

Subject: Re: CT sprint 39 review and sprint 40 planning

On Jun 22, 2010 14:49 PM, phamtuanchip@gmail.com wrote:

Dear eXoers,

last week C Team finished sprint 39

- Release CS 2.0.0 GA
- Fix bug for KS 2.1
- Welcome newcomer for CT
- Make patch for cs 1.3.5, ks 1.2.4


detail here <http://wiki-int.exoplatform.org/display/exoproducts/CT+Sprint+39>

This week we are working on sprint 40

- Issues for CS 2.1 and KS 2.1
- New feature and improvement
- Continue support for making patch of maintenance version of cs and ks
- Keep training for newcomer about Ulcomponent system
- Support CP team to wok on company forum version 2

Illustration 89: The Reply form

**Step 2:** Compose the message content by inputting text into the text editor.


**Step 3:** Click the button  **Send** to send the reply message.

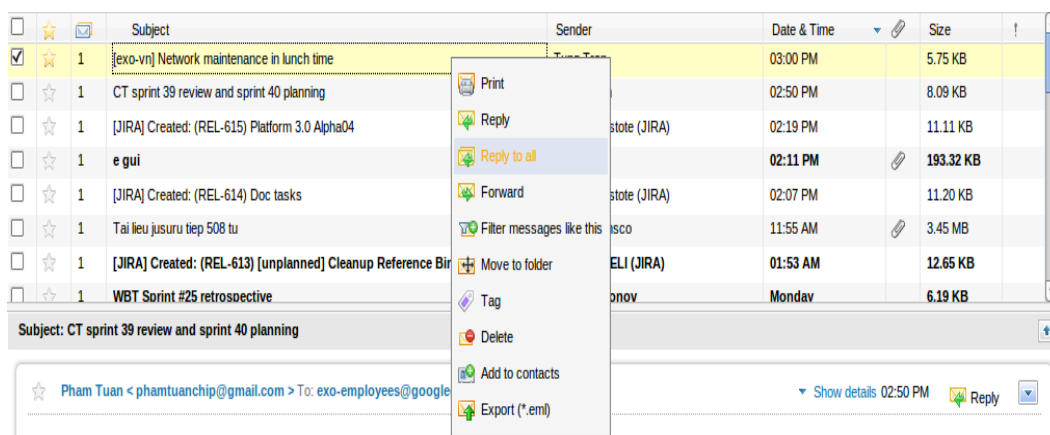
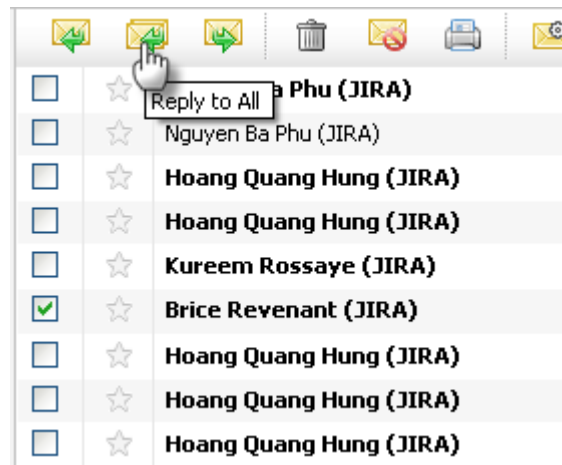
### 5.4.5 Reply messages to all related people

The function is similar to the Reply to sender function (in the 'To' field). However, the others who received the original mail (in field 'CC' or 'BCC') also receive this reply.

✓ **To reply to all, do as follows:**

**Step 1:** Select the message in the list that you want to reply to all by ticking on its

checkbox(es) and click the icon  or right-click the message which you want to reply to all and then click **Reply to all** in the menu.



Compose a new message will appear:

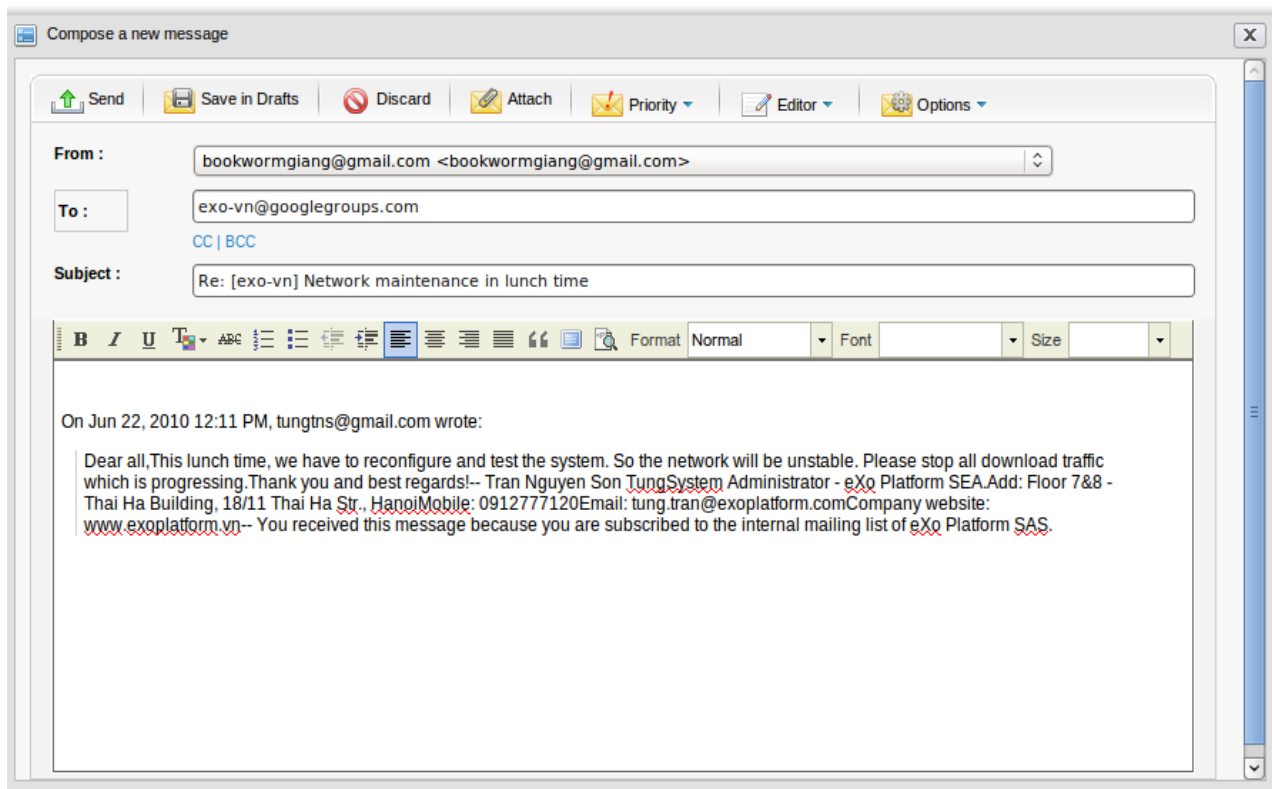
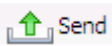




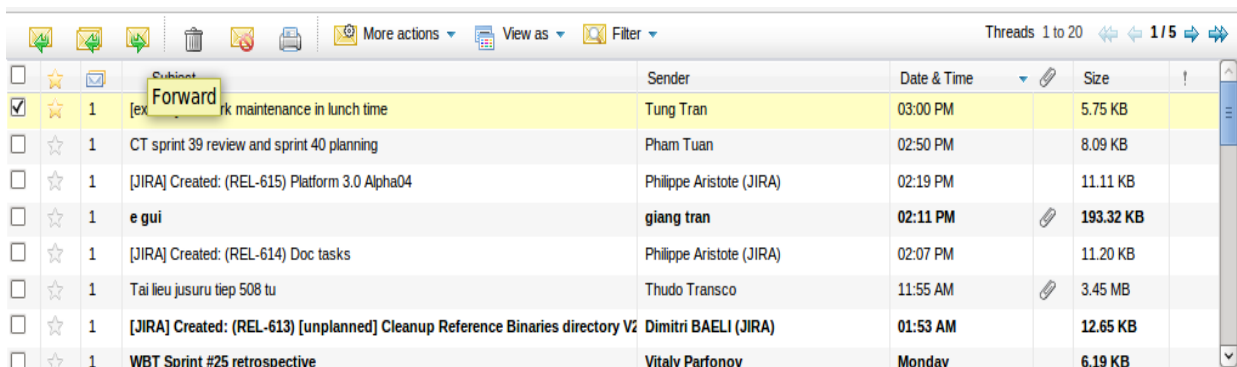
Illustration 90: The Reply to all form

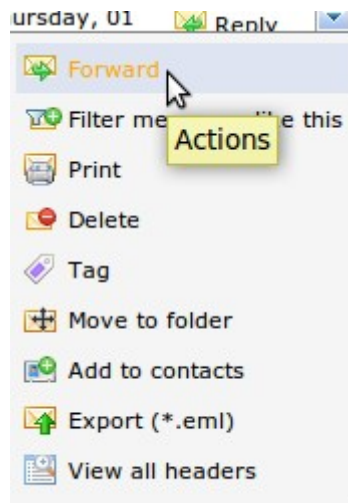
**Step 2:** Compose the message content by inputting text in the text editor then click the button  to send reply message.

## 5.4.6 Forward messages

The function is used to send your received message content to other users.

**Step 1:** Select the message which you want to forward and then click the icon  on the action bar. You can open the message which you want to forward, click  to show available related actions then click **Forward** in the menu:





The **Compose a new message** form will be displayed with the original contents of the message you want to forward.


A screenshot of the 'Compose a new message' form. The form has a toolbar with buttons for Send, Save in Drafts, Discard, Attach, Priority, Editor, and Options. The 'From' field is filled with 'bookwormgiang@gmail.com <bookwormgiang@gmail.com>'. The 'To' field is empty. The 'Subject' field is filled with 'Fwd: CT sprint 39 review and sprint 40 planning'. Below the fields is a rich text editor with a toolbar. The body of the message contains the following text:

----- Original Message -----  
Subject: CT sprint 39 review and sprint 40 planning  
Date: Tue Jun 22 14:49:34 ICT 2010  
From: Pham Tuan "phamtuanchip@gmail.com"  
To: exo-employees@googlegroups.com "exo-employees@googlegroups.com"

Dear eXoers ,  
last week C Team finished sprint 39  
- Release CS 2.0.0 GA  
- Fix bug for KS 2.1  
- Welcome newcomer for CT  
- Make patch for cs 1.3.5, ks 1.2.4  
detail here <http://wiki-int.exoplatform.org/display/exoproducts/CT+Sprint+39>

This week we are working on sprint 40  
- Issues for CS 2.1 and KS 2.1

Illustration 91: The Forward message form

**Step 2:** Compose or edit a message if needed then click the button  **Send** to forward the message.

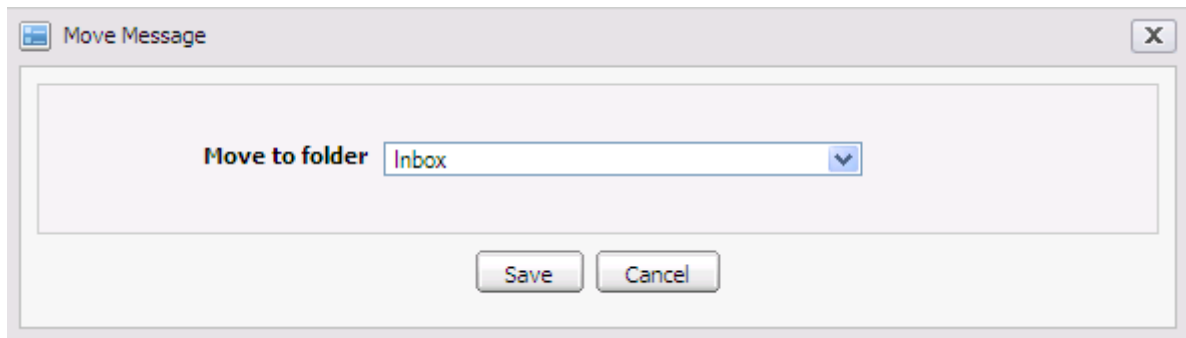
## 5.4.7 Move messages to folders

This function is used to move one or more messages to other folders.

- ✓ **To move messages to another folders, do as follows:**

**Step 1:** Select messages which you want to move by selecting its checkbox(es).

**Step 2:** Right-click these messages and click **Move to folder** in the menu.



**Step 3:** All existing folders are displayed in a list, select one for the destination folder.


## 5.4.8 Manage tags

Tags are used as labels which allows filtering or categorizing messages from different folders. They do all the work that folders do and give you an extra bonus: you can add more than one tag to an email message. After you add a tag to email messages, you can easily view all the messages that have the same tag(s) by clicking the tag name along the left side panel. A single message can be assigned to many tags. Using tags makes it easy for you to find your messages independently from the folder where you stored them.

You can easily create, edit, and delete existing labels. Followings will show you how:

### 5.4.8.1 Tag a message

- ✓ **To create a new tag:**

**Step 1:** Click the icon  on the **Tags** bar of right panel and click **Add a new tag** in the drop-down list. The Tag form will appear:



The 'Tag' dialog box contains the following fields and controls:

- Name:** A text input field containing 'Social network news' with a required field asterisk.
- Color:** A color selection box showing a green color.
- Description:** A text area containing 'mails from friends in social networks'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

Details:

<b>New name</b>	The new tag's name. (*Required)
<b>Color</b>	The tag's color.
<b>Description</b>	The tag's brief description.

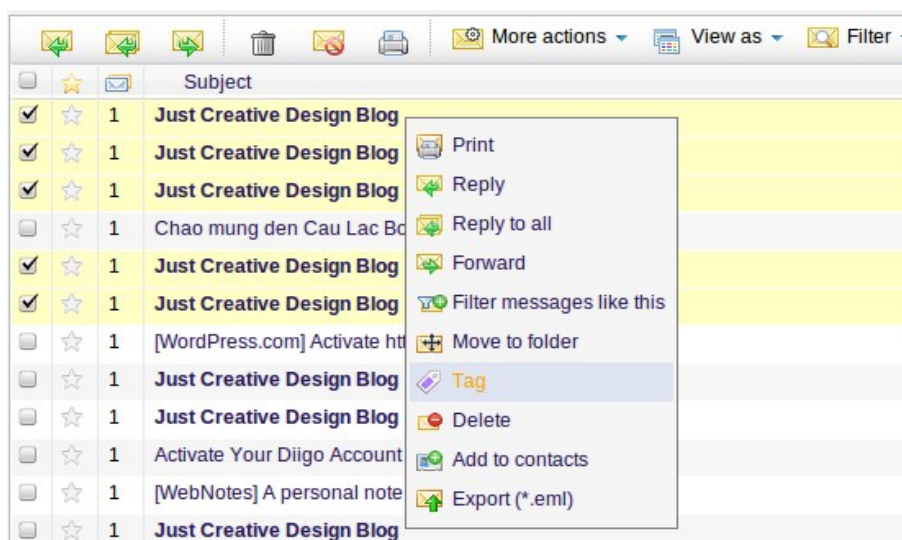
**Step 2:** Fill in required fields then click **Save** to finish.

A new tag will be updated at the tag list and now you can start adding this tag to any message.

- ✓ To tag message(s):

**Step 1:** Select message(s) by selecting its checkbox(es).

**Step 2:** Right-click one of the selected messages and click **Tag** in the menu. In other way, you also can click **More Actions** button the action bar and click **Tag** in the menu.



**Step 3:** The **Tag Message** form will appear:

Tag Message

Subject : Just Creative Design Blog no-tag  
 Subject : Just Creative Design Blog no-tag  
 Subject : Just Creative Design Blog no-tag  
 Subject : Just Creative Design Blog no-tag  
 Subject : Just Creative Design Blog no-tag

Tag name

Color

JCD blog news ☐  
 eXo tasks ☐  
 account info ☐

Add Remove Cancel

type here to add a new tag

or select from existing tags

Illustration 92: The Tag Message form

Details:

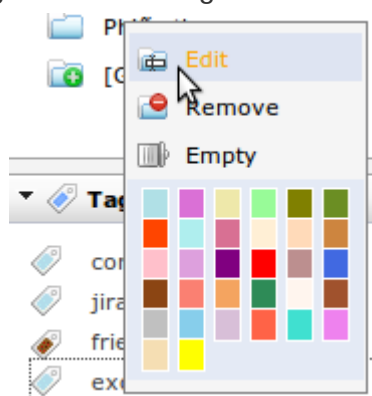
<b>Tag Name</b>	The tag's name. This field contains words and keywords which are used to describe the same messages.
<b>Choose Color</b>	The color of the tag
<b>Add button</b>	To accept adding message to a new tag.
<b>Remove button</b>	To remove tags in case messages were already tagged

**Step 4:** Name the new tag for the selected items or select from existing tags. Click Add to add tag(s) to selected items .

### 5.4.8.2 Edit a tag

- ✓ To edit an existing tag, do as follows:

**Step 1:** Right-click on a tag name in the tag list and click **Edit** in the menu:



The **Edit Tag** form will appear:

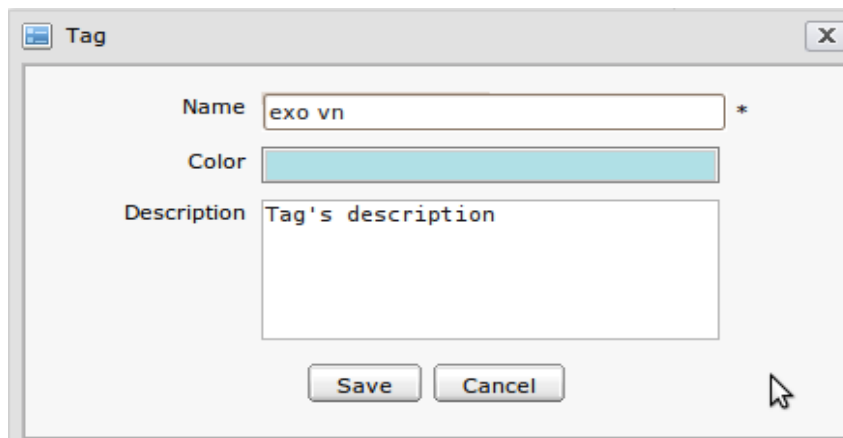


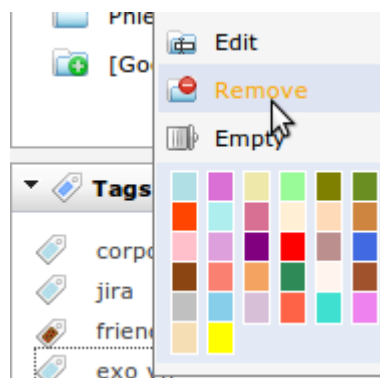
Illustration 93: The Edit tag form

**Step 2:** Make changes to the tag then click **Save** to save changes.

### 5.4.8.3 Remove a tag

- ✓ To remove a tag, do as follows:

Right-click the tag that you want to remove from the tag list and then select **Remove** in the drop-down menu:

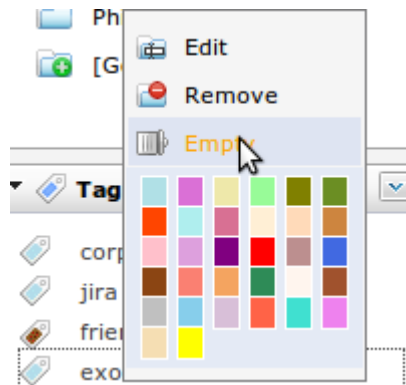


The selected tag will be removed from the tag list and it will also be removed from all messages to which this tag was assigned.

### 3.5.8.4 Empty a tag

This function is to untag all the messages that have same tag.

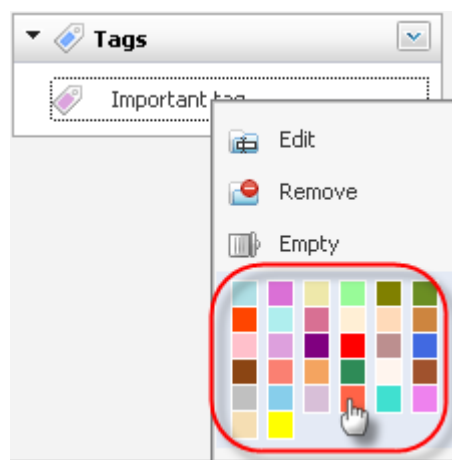
- ✓ To empty a tag, do as follows:



Right-click a tag that need to be emptied and select **Empty** in the drop-down menu: The selected tag will be removed from all messages. When you click the emptied tag, there will be no message shown in the message list panel.

#### 5.4.8.4 Change tag color


The function allows changing the color of a tag in the tag list by right-clicking the tag that you want to change and then select one color in the colors area. There are 32 available colors in the colors palette:



#### 5.4.9 Report a message as spam

The function is used to report message(s) in a specific folder as unwanted message(s).

✓ **To report an email as spam, do as follows:**

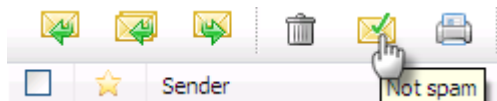
Select the messages which you want to report as spam then click the icon  on the action bar:



All the selected messages will be moved into the **Spam** folder. Go into the **Spam** folder to verify that the selected messages have been moved into it.

After reporting a message as spam, the messages from the sender who has been reported as spam will be moved automatically to the **Spam** folder.

- ✓ To move messages from Spam folder, do as follows:  
Select the messages which you want move from **Spam** folder then click **Not spam** icon on the action bar:



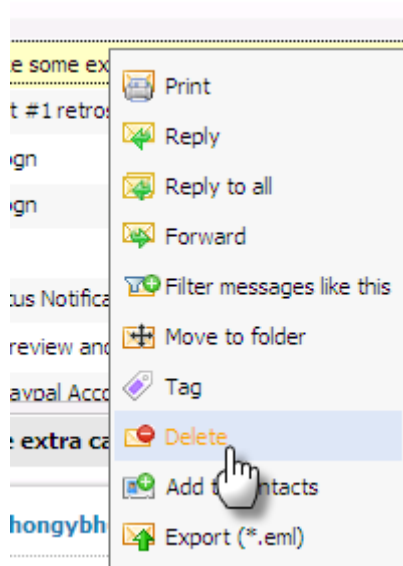
After reporting as 'not spam' successfully, the message from the sender who has been reported as not spam will be moved automatically to its original folder. Once a message was removed from **Spam** folder, all the messages from its sender will be received normally.

### 5.4.10 Delete a message

The function is used to delete messages permanently by moving messages from its folder to the **Trash** folder.

- ✓ To delete a message, do as follows:

Right-click the message which you want to delete and select **Delete** in the menu. You also can select messages and click trash icon from action bar:



### 5.4.11 Export messages

The function is used to export one message to a file with the \*.eml format.

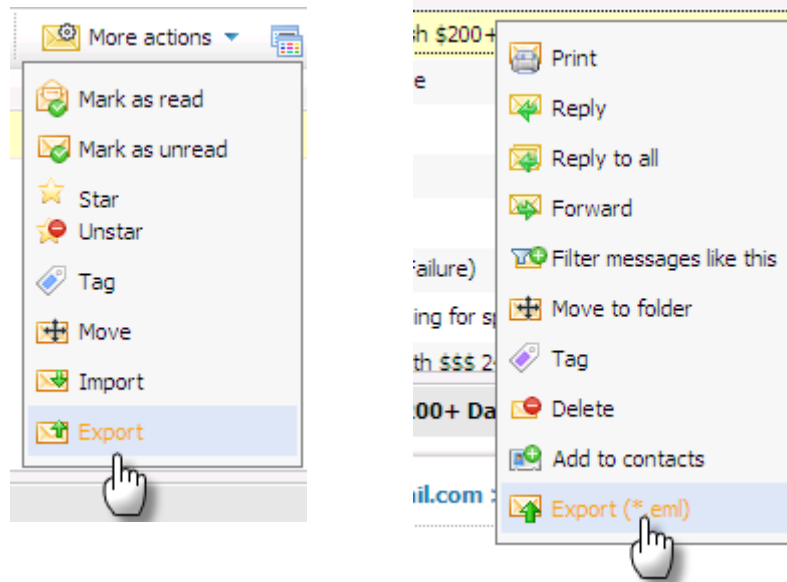
- ✓ To export a message, do as one of the following ways follows:

#### Step 1:

Right-click the message that you want to export to the file \*.eml and then select **Export**

in the menu.

Check the message to export by selecting its checkbox(es) and then select the **Export message** item in the **More Actions** menu:



The **Export Message** form will appear:

**Illustration 94: The Export Message form**

Details:

<b>File name</b>	The name of file which you want to export to. By default, the subject of the selected message will be used but you can change this name.
<b>Export format</b>	The format of the file which will be exported. By default, the type of file is *.eml.

**Step 2:** Click the **Export** button to accept the exporting file.

## 5.4.12 More actions

The section will show you how to take some extra actions related to messages.

#### 5.4.12.1 Mark a message as read

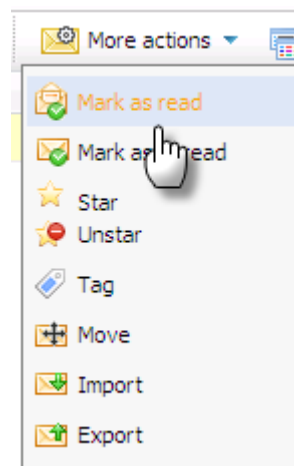
The function allows marking one or more messages as read by removing bold format of message.

- ✓ To mark message as read, do as follows:

**The 1<sup>st</sup> way:**

**Step 1:** Select messages to mark as read by selecting its checkbox(es).

**Step 2:** Select the **Mark as read** item in the **More Actions** drop-down menu on the action bar:



**The 2<sup>nd</sup> way:** This function is used to mark all unread messages in a specific folder.

**Step 1:** Right-click the folder which contains messages that you want to mark as read.

**Step 2:** Select **Mark all read** in the drop-down menu.

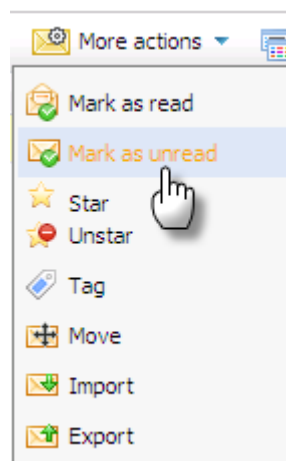
All selected unread messages will be marked as read.

#### 5.4.12.2 Mark a message as unread

- ✓ To mark a message as unread, do as follows:

**Step 1:** Select the messages which you would like to mark as unread

**Step 2:** Click **Mark as unread** in the **More Actions** menu on the action bar:



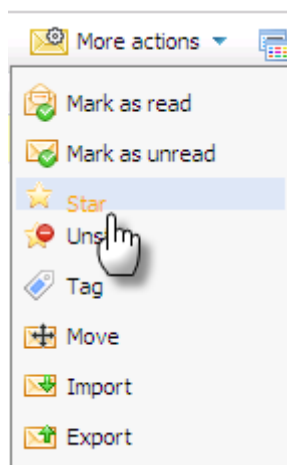
### 5.4.12.3 Star and unstar messages

The function allows you to assign a star to special messages or conversation to make them more outstanding than others so you easily follow these messages.

✓ **To star a message, do as follows:**

The 1<sup>st</sup> way:

**Step 1:** Select message(s) then click **Star** from the **More Actions** drop-down menu on the action bar:



The 2<sup>nd</sup> way:

In the message list panel, click the star icon next to the message you'd like to add a star.

After marking, the selected messages will be appended a icon ★ so that you can recognize them quickly:

<input type="checkbox"/>	★	Nguyen Thanh Cong (JIRA)	[JIRA] Closed: (CS-418) Do not show conversation of mess ( 1 )	Thursday	1.20 I	
<input type="checkbox"/>	★	Nguyen Thanh Cong (JIR	[JIRA] Closed: (CS-628) Error when view RSS URL a ( 1 )	Thursday	1.11	
<input type="checkbox"/>	★	Sergey Kabashnyuk (JIR	[JIRA] Resolved: (JCR-391) Anonymous logic ( 1 )	Thursday	1.00	
<input type="checkbox"/>	★	Luong Trung Hieu (JIRA)	[JIRA] Resolved: (CS-641) Imported file name is shown inv: ( 1 )	Thursday	1.39 I	
<input type="checkbox"/>	★	Nguyen Thanh Cong (JIRA)	[JIRA] Created: (CS-648) Unknown error in case ticking all / ( 5 )	Thursday	798 B	
<input type="checkbox"/>	★	Nguyen Thanh Cong (JIRA)	[JIRA] Updated: (CS-648) Unknown error in case tickin	Thursday	1.06 I	
<input type="checkbox"/>	★	Hoang Quang Hung (JIRA)	[JIRA] Work started: (CS-648) Unknown error in case	Thursday	1024	
<input type="checkbox"/>	★	Hoang Quang Hung (JIRA)	[JIRA] Work stopped: (CS-648) Unknown error in case	Thursday	1024	
<input type="checkbox"/>	★	Nguyen Thanh Cong (JIRA)	[JIRA] Closed: (CS-648) Unknown error in case ticking	Thursday	1.05 I	

Illustration 95: The messages with star view

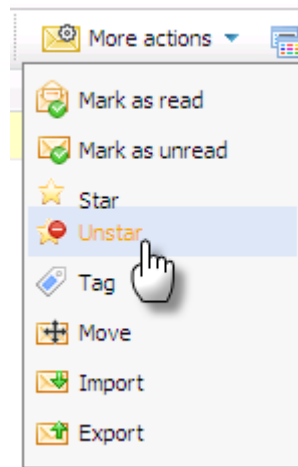
✓ **To remove stars from messages, do as follows:**

The 1<sup>st</sup> way:

**Step 1:** Check the starred messages by selecting its checkbox(es)



**Step 2:** Select **Unstar** in the **More Actions** menu on the action bar:



**The 2<sup>nd</sup> way:**

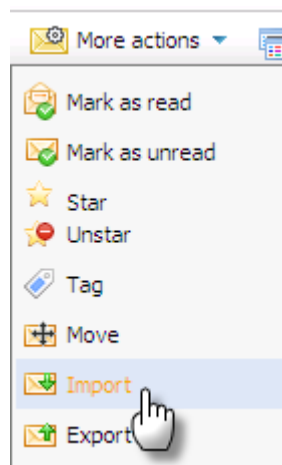
In the message list panel, click the star icon which corresponds to the message that you want to remove star.

#### 5.4.12.4 Import messages

The function is used to import messages from your computer to specific folder.

- ✓ To import messages, do as follows:

**Step 1:** Select the **Import message** in the **More Actions** menu on the action bar:



The **Import Message** form will appear:

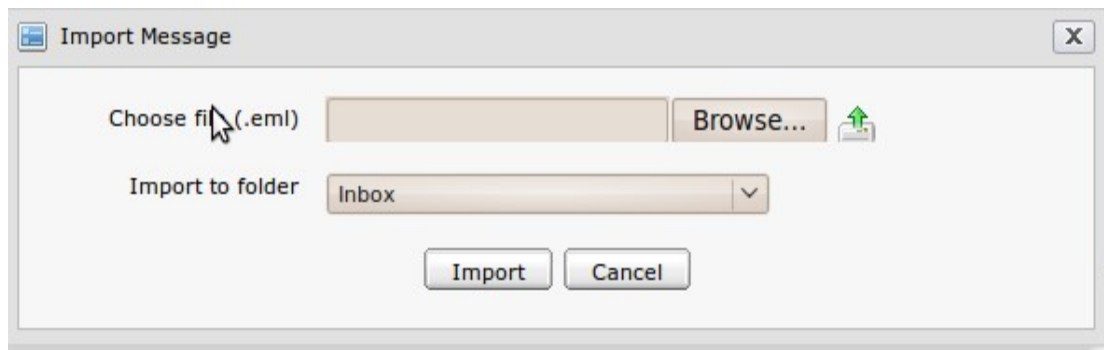
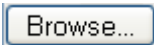



Illustration 96: The Import Message form

Details:

<b>Choose file (.eml)</b>	The name of the file which you want to import from your computer.
<b>Import message to folder</b>	The folder where the message will be imported.

**Step 2:** Click the button  to get one file .eml from the computer and then click the icon  to upload selected file.

**Step 3:** Complete importing by clicking the **Import** button.




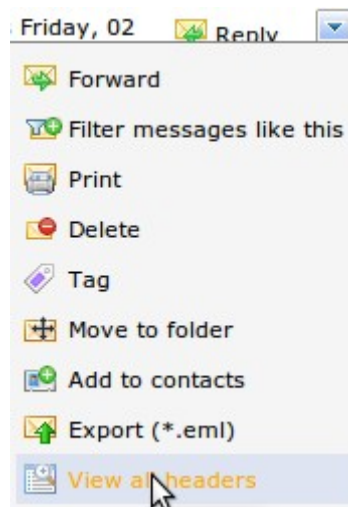
*By default, your imported file must be in the \*.eml format.*

#### 5.4.12.5 View full headers of a message

The header's information which is displayed by default, just includes: the sender's email address, the receivers' email addresses and the subject of the mail. If you want to view full headers of a mail, you can do as follows:

**Step 1:** Open the message which you want to view its full headers.

**Step 2:** Click the icon  on the right corner of message's content and select **View Full Headers** in the drop-down menu:



The **View message headers** pop-up will appear:

A screenshot of the 'All Message Headers' window. It displays a table with two columns: 'Key' and 'Value'. The table contains the following data:

Key	Value
MIME-Version	1.0
Return-Path	
Message-ID	<68534918.30619.1270160966524.JavaMail.jira@dom 12-31-39-00-0D-12>
Subject	[JIRA] Created: (REL-538) Automatize the tomcat packaging for IBM JVM
Content-Transfer-Encoding	7bit
To	giang.tran@exoplatform.com
Authentication-Results	mx.google.com; spf=neutral (google.com: 66.11.225.78 is neither permitted nor denied by best guess record for domain of jira@exoplatform.com) smtp.mail=jira@exoplatform.com
X-Spam-Level	
X-Spam-Status	No, score=0.4 required=7.0 tests=ALL_TRUSTED,AWL,BAYES_00, FH_DATE_PAST_20XX,HTML_MESSAGE,MIME_HTML_O autolearn=no version=3.2.5
X-JIRA-FingerPrint	86308e724d11bbb678aa3e4c45868136
Delivered-To	bookwormgiang@gmail.com
Received-SPF	neutral (google.com: 66.11.225.78 is neither permitted nor denied by best guess record for domain of jira@exoplatform.com) client- ip=66.11.225.78

Illustration 97: The Full Message Headers form

### 5.4.13 View and filter mails

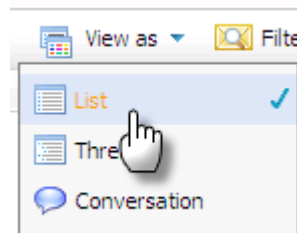
The function is used to view all mails in a specific folder according to some criteria that you want to

view.

### 5.4.13.1 View as

#### a) View as List

This view arranges the message as a list. To view messages according to this way, click **View as** and select **List** item in the menu pop ups:



The messages will be arranged:

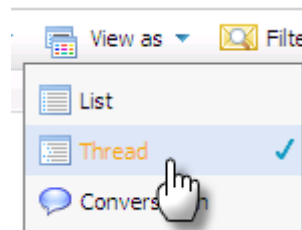
A screenshot of the email list view. The table shows a list of messages with columns for checkboxes, stars, subject, sender, time, and size. A red rectangle highlights the first seven rows of the message list.

<input type="checkbox"/>	☆	[JIRA] Updated: (DOC-300) Answers User Guide	Philippe Aristote (JIRA)	11:11 AM		13.87 KB
<input type="checkbox"/>	☆	Re: [exo-pm] New Forums	Thomas DELHOMENIE	05:01 AM		22.12 KB
<input type="checkbox"/>	☆	Re: [exo-pm] New Forums	Arnaud Héritier	04:50 AM		20.61 KB
<input type="checkbox"/>	☆	Re: [exo-pm] New Forums	Marwan Guetari	03:59 AM		20.11 KB
<input type="checkbox"/>	☆	Re: [exo-pm] New Forums	Arnaud Héritier	03:52 AM		19.51 KB
<input type="checkbox"/>	☆	Re: [exo-pm] New Forums	Arnaud Héritier	03:46 AM		19.65 KB
<input type="checkbox"/>	☆	Re: [exo-pm] New Forums	Benjamin Mestrallet	03:44 AM		17.22 KB
<input type="checkbox"/>	☆	Re: [exo-pm] New Forums	Marwan Guetari	03:43 AM		15.76 KB

Illustration 98: View message as list

#### b) View as Thread

This view arranges conversation as a tree structure. All replies are shown as sub-nodes. To change the view to thread view, click **View as** and select **Thread** in the pop-up menu:



The message and all of its replies will be displayed:

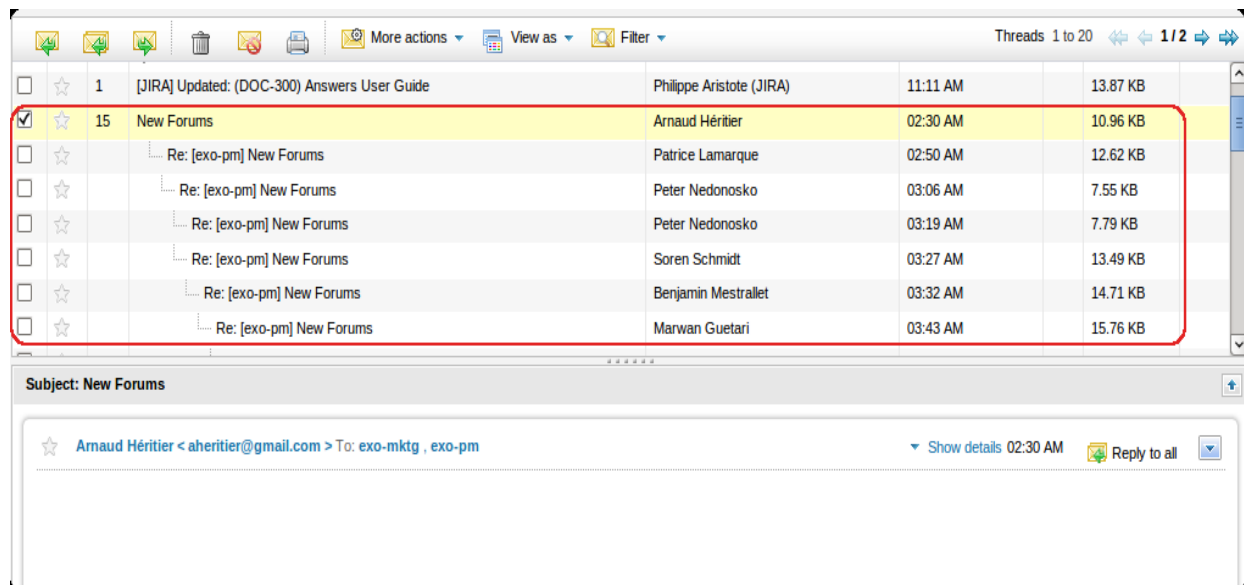
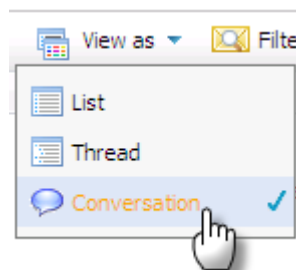


Illustration 99: View message as thread

### c) View as Conversation

With this view, the messages which are the replies of one mail will not be displayed in the messages list but on the message panel.

To view messages as conversation, click **View as** and select **Conversation** in the pop-up menu:



The mail and its replies will be displayed:

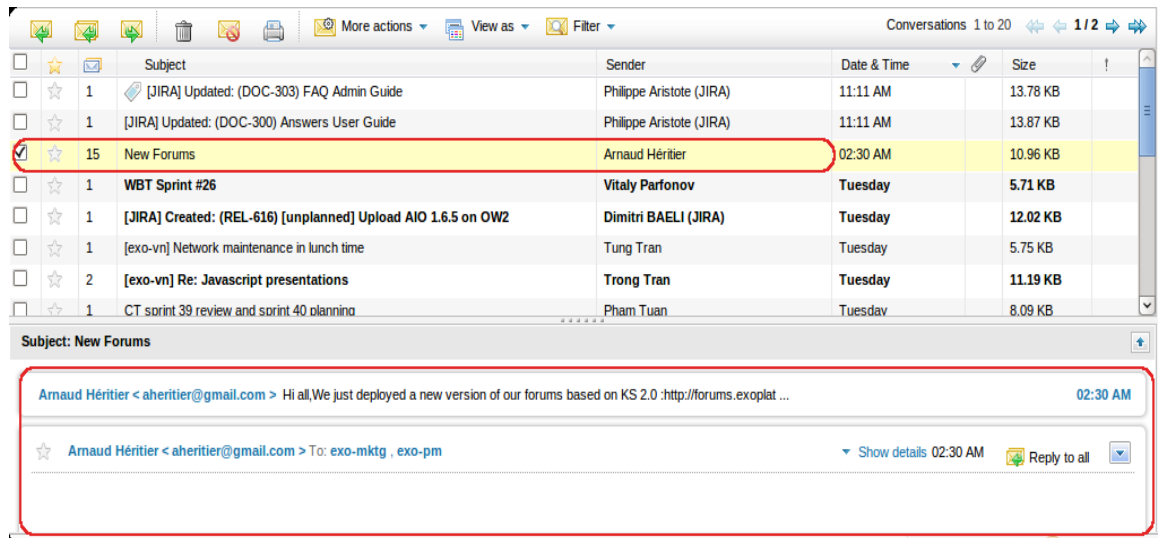


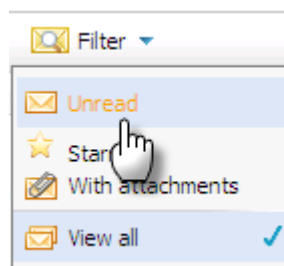
Illustration 100: View message as conversation

### 5.4.13.2 Filter messages

By default, the message list shows all of your received message in your inbox. Filtering message is useful when you want to view just some types of message in the message list.

Filter Unread messages

Click **Filter** and select **Unread** in the drop-down menu, only unread messages will be shown.



Filter star messages

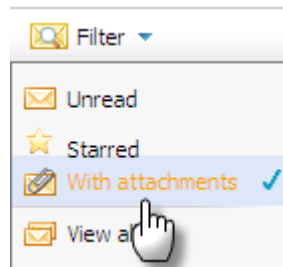
Click **Filter** and select **Starred** in the drop-down menu, only starred messages will be shown.



Filter message with attachments

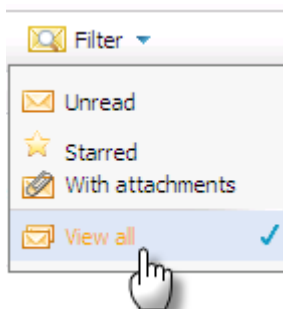
Click **Filter** and select **With attachments** in the drop-down menu, only messages with

attachments will be shown.



### View all messages

The function is used to view all types of messages in the list. Click **Filter** and select **View all** in the pop-up menu:



## 5.4.14 Manage filters


Filters allow setting up rules to apply for incoming messages. Filters allow incoming message that matching some criteria can be applying your pre-defined actions.

### 5.4.14.1 Add a new filter

The function is used to add a new filter.

Do as follows:

**The 1<sup>st</sup> way:** This way manually define condition for the new message filter.

**Step 1:** First of all, click the button  on the toolbar. The **Message Filter** form will appear:

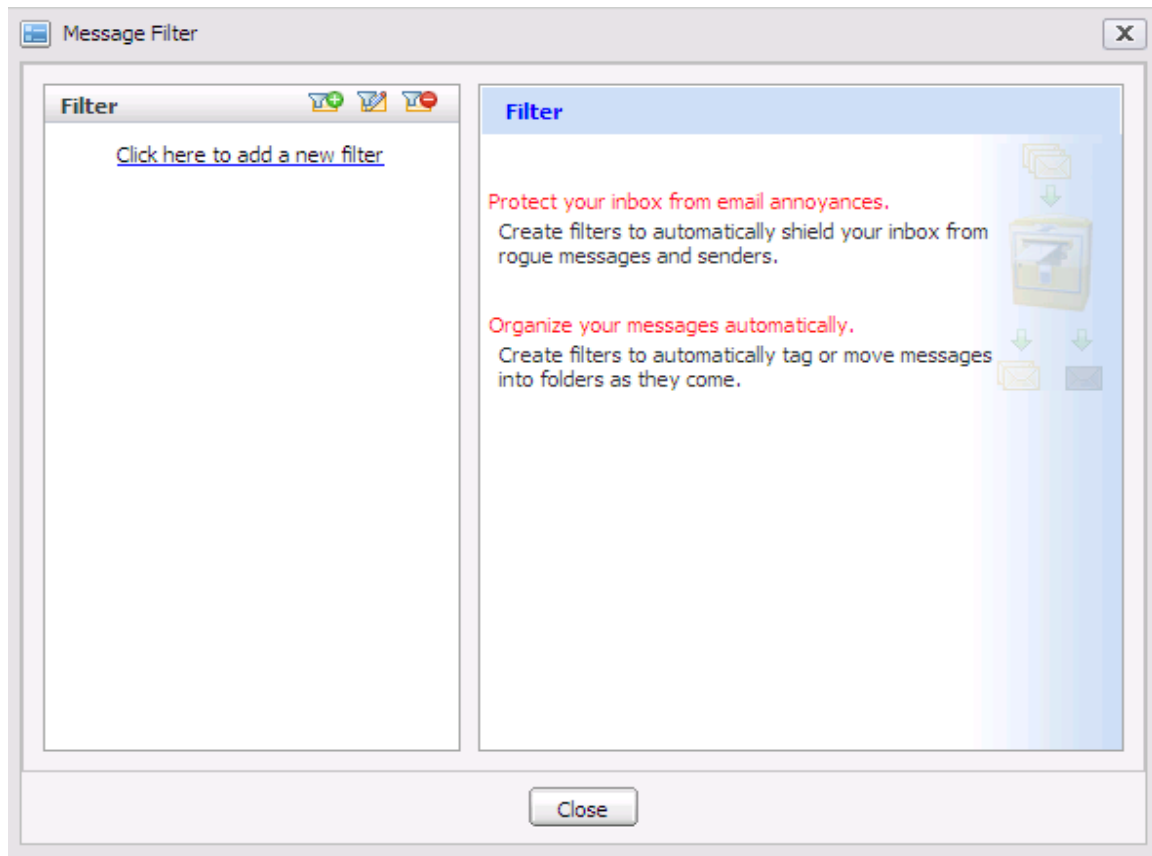



Illustration 101: The Message Filter form

**Step 2:** Click the icon  or press the "Click here to add a new filter" link to create a new filter.

The **Add/Edit Message Filter** will appear:



Illustration 102: The Add/Edit Message Filter form

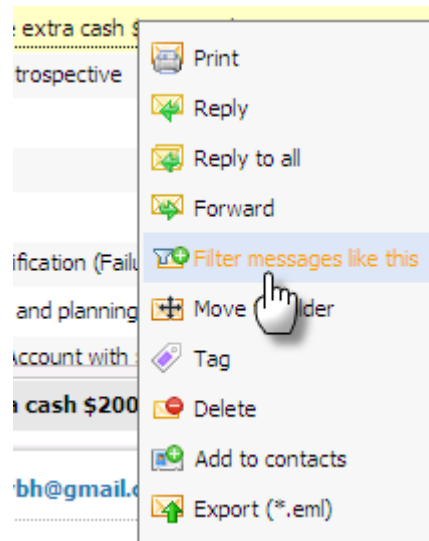
Details:

<b>Filter Name</b>	The filter's name. (Required).
<b>From</b>	This condition is to filter the email address of sender.
<b>To</b>	This condition is to filter the mail address of receiver.
<b>Subject</b>	This condition is to filter the subject of incoming messages.
<b>Body</b>	This condition is to filter the body of incoming messages.
<b>Move the message to folder</b>	The folder to which the messages satisfying with the filter will be moved.
<b>Apply tag</b>	The tag to which the messages satisfying with the filter will be applied
<b>Apply for all messages</b>	The option allows applying the filter to all current messages.
<b>Execute now</b>	To take the action immediately.

**Step 3:** Define your own rules for new filter.**Step 4:** Complete adding the message filter by clicking **Save**.

**The 2<sup>nd</sup> way:** This way allows creating a new filter from within message. The filter will get conditions of selected message and applied to its criteria.

**Step 1:** Select a message containing the criteria you'd like to include in your new filter.



The **Add/Edit Message Filter** form will appear with some pre-defined filter conditions basing on the current selected message:

A screenshot of the 'Add/Edit Message Filter' dialog box. The dialog has a title bar with a close button. Inside, there is a 'Filter Name' field containing 'dangthuy438x@gmail.com'. Below this is a section titled 'If all of the flowing rules are true ...'. It contains four rows of filter rules: 'From: contains' with value 'dangthuy438x@gmail.com', 'To: contains' with value 'exo-vn@gmail.com', 'Subject: contains' with an empty field, and 'Body: contains' with value 'Introduction'. Below this is a section titled 'Then ...'. It contains two actions: 'Move the message to folder:' with a dropdown set to 'WebServices', and 'Apply tag:' with a dropdown set to 'Social network news'. There is also an 'Execute now' checkbox which is unchecked. At the bottom are 'Save' and 'Cancel' buttons.

**Step 2:** Make changes to rules if needed then click **Save** to finish.

After creating a filter, the created filter will be displayed in the list. All messages which satisfies with filter rules will be effected. Messages will be moved into specific folder or tag, etc.


#### 5.4.14.2 Edit a filter

The function is used to make changes on a specific filter.

- ✓ **To edit a filter, do as follows:**

**Step 1:** Open **Message Filter** form by clicking the button  on the toolbar.

The **Message Filter** form will appear and list all exiting filters.

**Step 2:** Select the filter to edit and then click the icon  on the filter bar in the **Message Filter** form. The **Add/Edit Message Filter** form will be shown with detailed information, available for editing.

**Step 3:** Change the filter's condition.


**Step 4:** Complete editing by clicking **Save**.

#### 5.4.14.3 Delete a filter

The function is used to remove a filter from the filter list.

- ✓ **To delete a filter, do as follows:**

**Step 1:** Open the **Message Filter** form by clicking  on the toolbar.

**Step 2:** Select the filter you want to delete and then click the icon  on the filter bar in the **Message filter** form.

The selected filter will be removed from list.


### 5.4.15 Manage the Address Book

The Address book in the Mail application provides you with a list of contacts which can be retrieved for sending mail. This section will explain some additional actions related to the address book management.

#### 5.4.15.1 Add a new address book

This function is used to created new address books.

- ✓ **To add a new address book, do as follows:**

**Step 1:** Click the button  **Contacts** on the toolbar to go to the **Contacts** form:

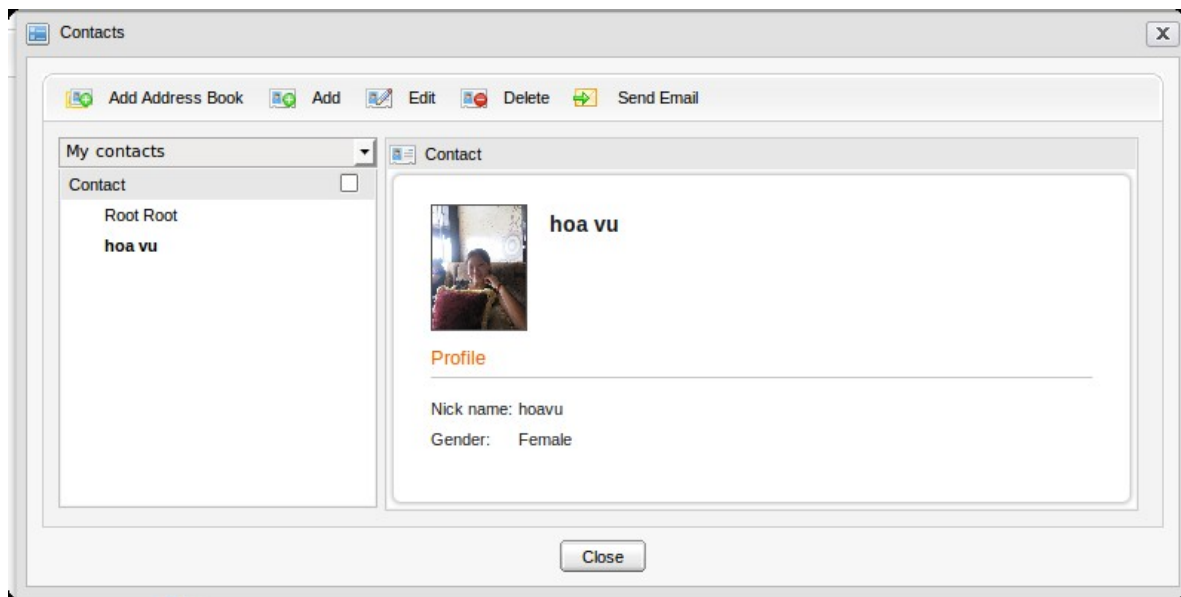


Illustration 103: The Address Book form

**Step 2:** Click the **Add Address Book** button to add a new address book. The **Add Address Book** form will appear:

The screenshot shows the 'Add Address Book' form. It has a title bar with the text 'Add Address Book' and a close button. The form contains two input fields: 'Name' and 'Description'. Below these fields are two buttons: 'Add' and 'Cancel'.

Illustration 104: The Add Address Book form

Details:

<b>Group name</b>	The name of the Address Book. (Required).
<b>Description</b>	The group description.

**Step 3:** Enter the name and description of new forum then click **Add** to finish.

### 5.4.15.2 Add a new contact

The function is used to add a new contact to a group.

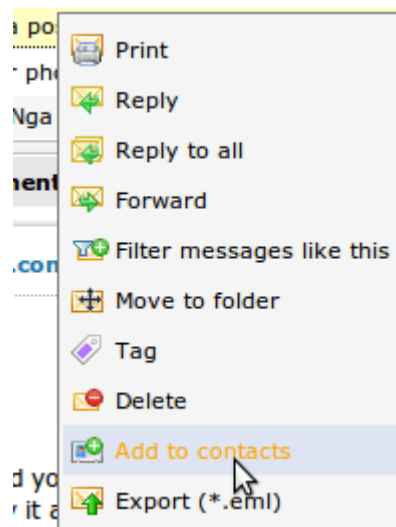
- ✓ To add the contact, do as follows:

**Step 1:** Open the Add new Contact form.


**The 1<sup>st</sup> way:** Click the button  **Add** on the **Contacts** form.

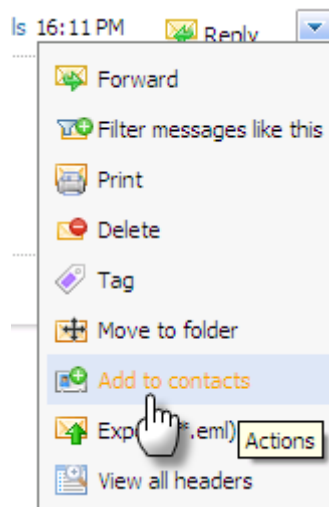
**The 2<sup>nd</sup> way:** This way is used to add the sender of a message to a specific group.

Right-click a message to add the sender to contacts list and then click **Add to contacts**.



**The 3<sup>rd</sup> way:** This way is also used to add a message sender to a specific group.




Open the message of the sender that you want to add to the contact list then click  at the right corner of the message's content. Select the **Add to contacts** item in the list:



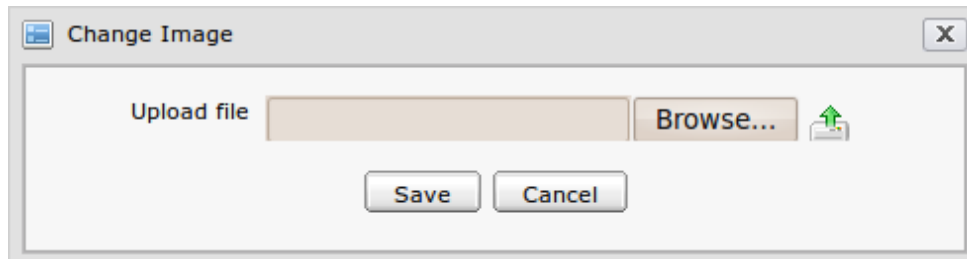
The **Add/Edit New Contact** will appear:

**Illustration 105: The Add new Contact form**

Details:

<b>Address Book</b>	The address book in which the contact is stored. You can select an address book from the list box or create new one by clicking the icon  .
<b>First Name</b>	The first name of the contact. With second and third way, value of this field is the sender's first name of this mail. (Required).
<b>Last Name</b>	The last name of the contact. With second and third way, value of this field is the sender's last name of this mail. (Required).
<b>Nick Name</b>	The nick name of the contact.
<b>Gender</b>	The gender of the contact.
<b>Birthday</b>	The birthday of the contact.
<b>Job Title</b>	The job's title of the contact.
<b>Email</b>	The email address of the contact. With second and third way, value of this field is the sender's email of this mail. The icon  is to add more email addresses for this contact. The icon  is to remove the added email.
<b>Change</b>	To change the current avatar.
<b>Delete</b>	To delete the current avatar and set it by default.

To add the picture to the contact, click the **Change** link to open the **Change Image** form:



Select the uploaded file from local computer by clicking the  button

Upload the selected file by clicking the  icon.

Click **Save** to accept saving the uploaded file.

**Step 2:** Input contact information, change or remove contact's picture by clicking Change/Remove link.

**Step 3:** Complete adding new contacts by clicking the **Save** button.


#### 5.4.15.3 Edit a contact

The function is used to edit a contact in a specific group.

✓ **To edit a contact, do as follows:**

**Step 1:** Open the **Contacts** form by clicking the button  **Contacts** in the main toolbar.

**Step 2:** Select the contact which you want to edit in the **Contacts** form.

**Step 3:** Click the button , the **Contact** form will be shown with detailed information.

**Step 4:** Change the contact 's information then click **Save** to finish.


#### 5.4.15.4 Delete a contact

The function is used to delete a contact from a specific group.

✓ **To delete a contact, do as follows:**

**Step 1:** Open the **Contacts** form by clicking the button  **Contacts** in the main toolbar.

**Step 2:** Select the contact which you want to delete in the **Address Book** form.

**Step 3:** Select the button , the confirmation message will be shown. Click **OK** to delete contact or click **Cancel** to quit.



*When you delete a contact which is tagged, it is still shown in tag. Only the deleted contact is removed completely from trash folder, the deleted contact is not shown in tag.*

### 3.5.15.5 Send an email

The function allows sending an email to the selected contacts.

- ✓ To send an email, do as follows:

**Step 1:** Select the contacts that you want to send an email.

**Step 2:** Click the button  .

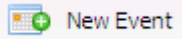
The **Compose a new message** form appears with the **To** field is input with all the selected emails.

**Step 3:** Compose the mail content and send it.

### 5.4.16 Add an event

The function interacts with the Calendar portlet which allows quickly adding new events into your calendar instead of directly going to Calendar portlet to do.

- ✓ **To add an event, do as follows:**

**Step 1:** Open the **Add event** form by clicking the button  on the main toolbar.

The **Add event** form will appear below:



**Add event**

Event detail | Reminders

Event summary \*

Description

Location

From 06/23/2010 15:45

To 06/23/2010 16:15

All day ☐

Priority None

Repeat No Repeat

Calendar Default

Event Category All

Attachments


Save Cancel

**Illustration 106: The Event detail tab of the Add event form**

Details:

The **Event Detail** tab contains basic event information:

<b>Event Summary</b>	The title of the event.
<b>Description</b>	The detailed description of the event.
<b>Location</b>	The location where the event will take place.
<b>From</b>	The start date/time of the event.
<b>To</b>	The end date/time of the event.
<b>All day</b>	The option allows selecting the duration of the task to be all day or not. If you don't check this option, you have to select the start date, time and end date. By default, the start date and end date is current date.
<b>Priority</b>	The priority level of the task.

<b>Repeat</b>	Interval time that you will be asked for a repeated reminder after every x minutes.
<b>Calendar</b>	The calendar in which the event will be stored.
<b>Event Category</b>	The category the event belongs to. To create a new Event category, click the plus icon  ,
<b>Attachments</b>	To add attached file to the events.

The **Reminders** tab: the reminder function allows you to remind about an event via a mail.

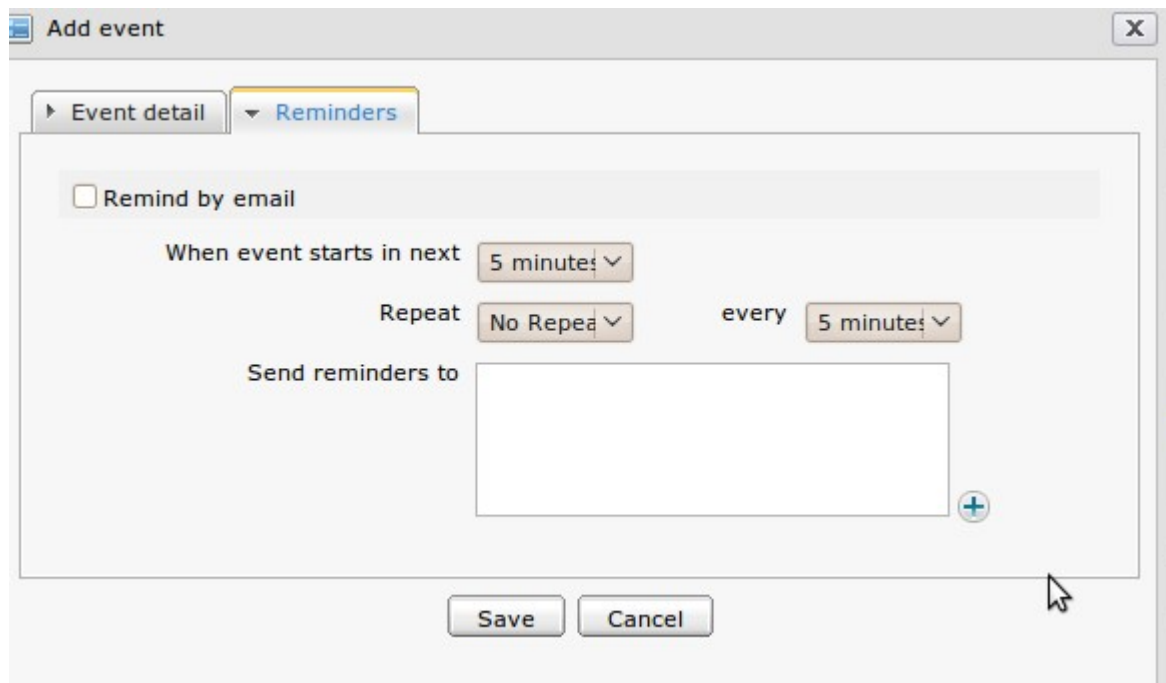



Illustration 107: The Reminders tab of Add event form

#### Reminder by mail:

<b>When event starts in next</b>	The time you will receive the mail reminder before event starts.
<b>Repeat</b>	The option allows setting reminder repetition mode or not for the event.
<b>every</b>	The interval time (in every xxx minutes) the reminder will be repeated before event stars.
<b>Send reminder to</b>	List of email addresses to which the reminder will be sent. The default value

is the email address of current user. You can input email address list or click  to select emails from the Select email form manually.

After adding email addresses successfully, the email addresses of selected contacts are displayed in the 'Send reminders to' field of the **Reminders** tab.

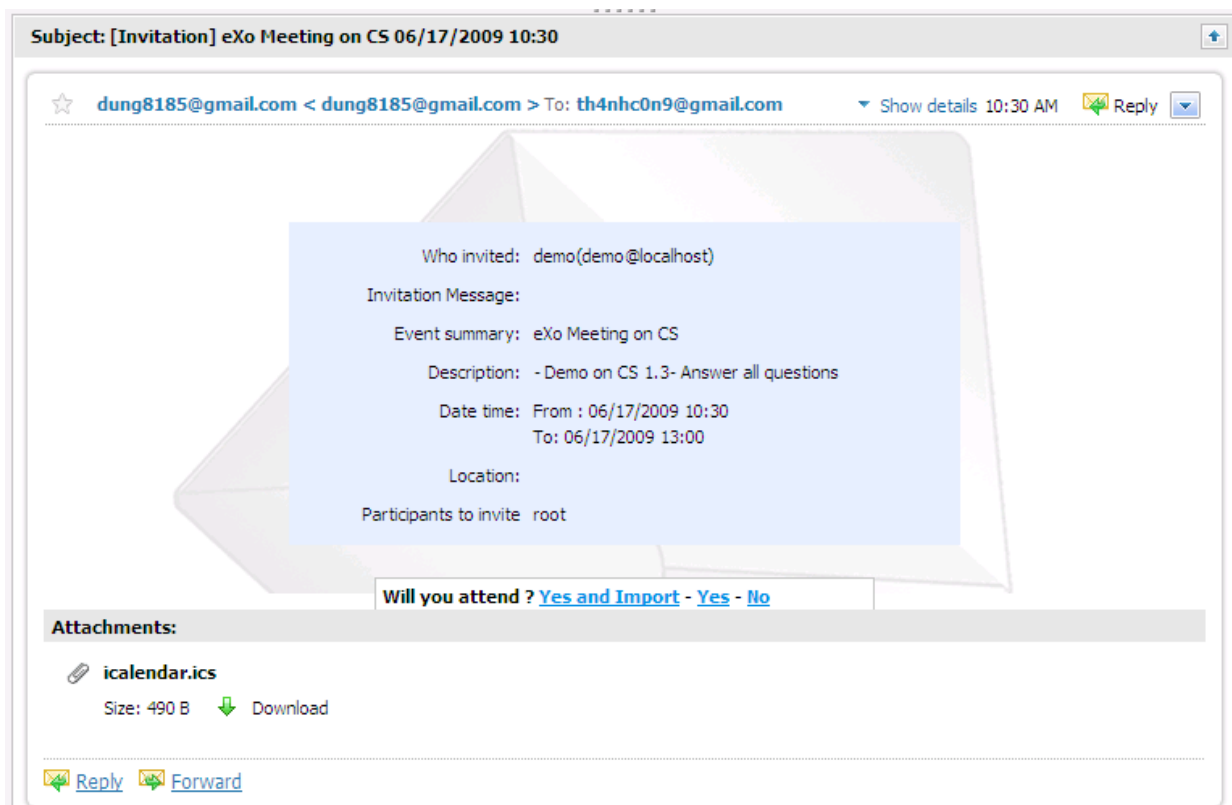
**Step 2:** Fill in the Add event form.

**Step 3:** Complete adding new event by clicking **Save** .



*This function supports adding new events into the Calendar portlet through Email portlet. (See Calendar User Guide ).*

When you receive an Invitation mail on taking part in a specific event, you can import an event directly in your calendar. The Invitation mail content is shown as below:



**Illustration 108: The content of an Invitation mail**

There are 3 options:

- The **Yes and Import** option means that you accept taking part in the event in the Invitation mail and import the event into your calendar to remind you about this event. The event will be imported directly into your **Default** calendar in the Calendar portlet.

- The **Yes** option means that you accept taking part in the event without importing it into your calendar.
- The **No** option means that you refuse taking part in the event in the Invitation mail.

## 5.4.17 Search


The function allows you to find mails. There are two types of searching: quick search and advanced search.

### 5.4.17.1 Quick Search

The function allows you to do a quick search with specific keywords in all your messages. All messages from the different folder having the text matching with your search term will be displayed in search result form. To do a quick search, do as follows:

**Step 1:** Enter a search term into the Search field:



**Step 2:** Click the  icon.

For example, quick search with “jira” term. All messages matching with “jira” term are listed in the search results form. The Search result form will be displayed:

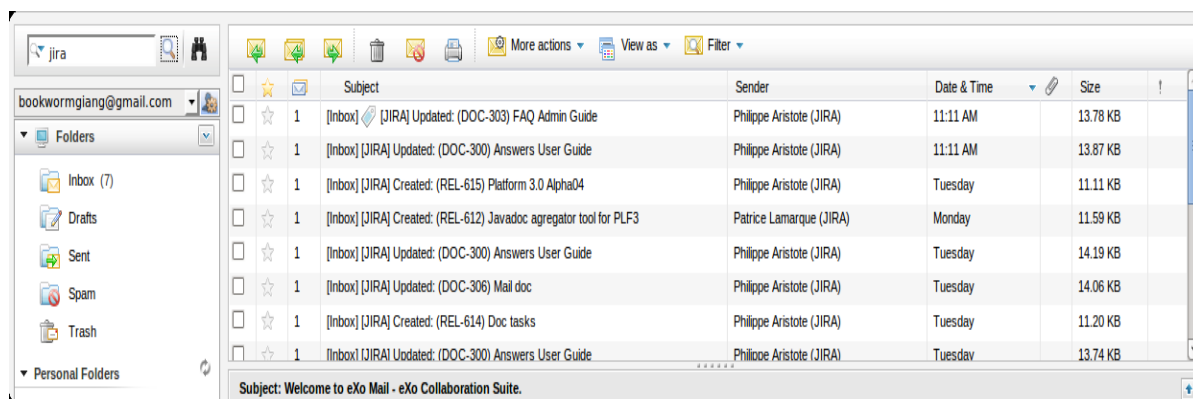



Illustration 109: Search results



- The default search is not done in the Spam and Trash folders.
- The messages in Spam and Trash folders can be searched by positioning explicitly into them.

### 5.4.17.2 Advanced Search

The Advanced Search allows you to specify precise search criteria. Do as follows:

**Step 1:** Click the icon  to the right of the search box.

The **Advanced search** form will appear:

**Illustration 110: The Advanced Search form**

In this form, you can set one, few or all criteria for your search.

Details:

Search in folder	The folder which you want to search in.
From	<p>The condition corresponding to the sender's name or mail addresses. There are some options:</p> <ul style="list-style-type: none"> <li>contains: includes the terms in search box.</li> <li>doesn't contain: do not include the term in search box.</li> <li>is: include exactly the term in search box</li> <li>is not: do not include exactly the term in search box</li> <li>starts with: starts with the term in search box</li> <li>Does not start with: do not start with the term in search box</li> </ul>
To	The condition corresponding to receiver 's name or mail address.
Subject	This condition which corresponds to the message subject.
Message	This condition which corresponds to the message content
Received before & Received after:	<p>The interval time when the search messages were receipted</p> <p><i>Has Star</i>: This option allows searching messages have star or not.</p> <p><i>Has attachment</i>: This option allows searching messages have attachment or not.</p> <p><i>Priority</i>: The priority of the search messages</p>

**Step 2:** Define the Search conditions.

**Step 3:** Click the **Search** button to launch the search.

All messages matching with your criteria will be listed in the search result form or click **Cancel** to quit.

## 5.4.18 Mail Settings

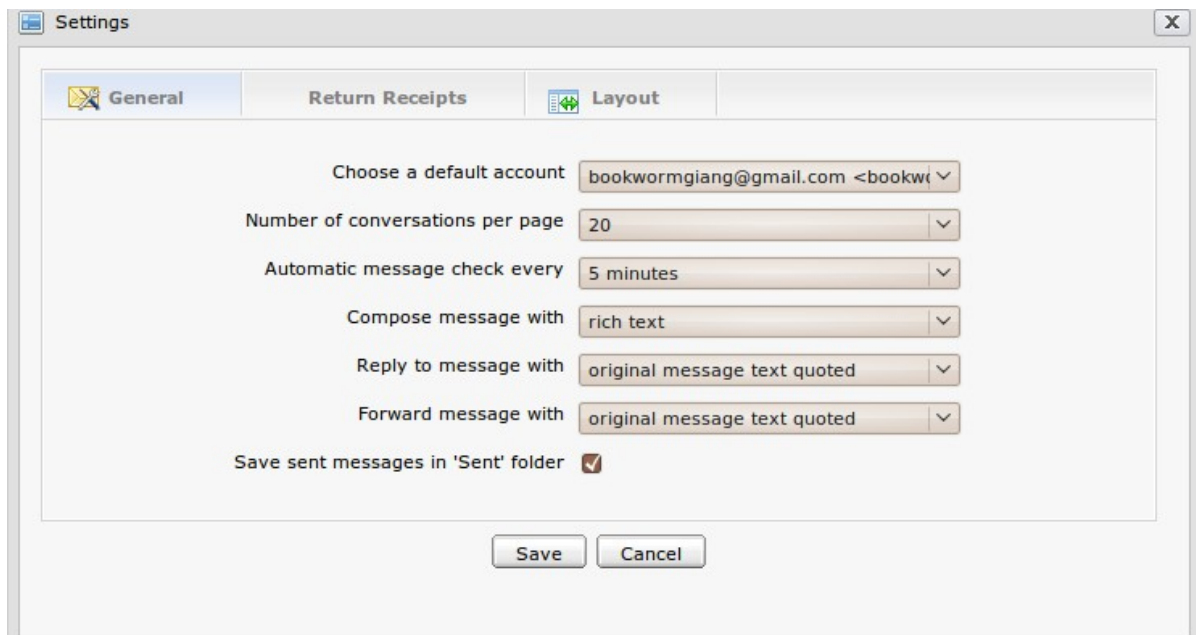
The function allows you to customize the behavior and layout of Mail for your own needs.

Do as follows:

**Step 1:** Click the button  on the toolbar.

The **Mail Settings** form appears with 3 tabs: General, Return Receipts and Layout.

The **General** tab contains basic setting information.



**Illustration 111: The General tab of the Mail Settings form**

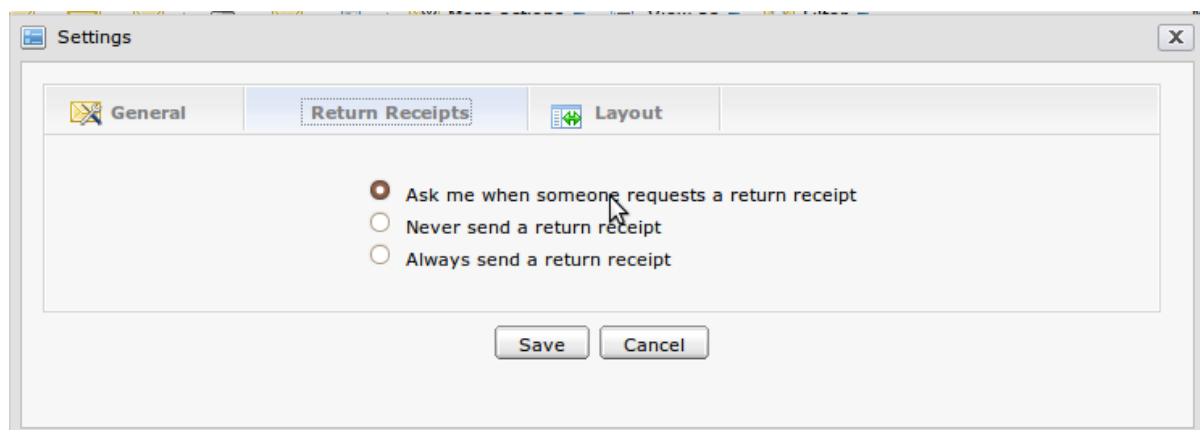
Details:

<b>Choose a default account</b>	The default account (including display name and email address) of the current user. User can select one of accounts in list.
<b>Number of conversations per page</b>	The number of conversations which will be displayed per page. The options including 10, 20, 30, etc or 70 message per one page in message list panel will be selected.
<b>Automatic message check every</b>	The interval time the system will check mail automatically. 5 minutes, 10 minutes, 20 minutes, 30 minutes or 1 hour will be selected. If 20 minutes is selected, after 20 minutes, the mail application will automatically get mail one time.

<b>Compose message with</b>	The default format of the message which is used when composing a message. There are 2 options: rich text and plain text. Rich text allows composing with some effects such font style, size, color, etc while the Plain text allows simple text only.
<b>Reply to message with</b>	There are two options. One allows replying message with attachment. Another allows replying with text only.
<b>Forward message with</b>	There are two options. One allows forwarding message with attachment. Another allows forwarding message with text only.
<b>Save sent messages in 'Sent' Folder</b>	The option allows saving sent messages in 'Sent' folder or not.

The **Return Receipts** tab allows setting the option for receipt notification.

For example, after reading a new mail in your Inbox, you can determine whether to send a notification to the sender or not to inform that you have read the message.



**Illustration 112: The Return Receipts tab of the Mail Settings form**

Details:

<b>Ask me when someone requests a return receipt</b>	This option allows you to receive an alert to inform that someone wants to receive your notification about the returned receipt.
<b>Never send a return receipt</b>	This option will ignore all requests for a return receipt from you.
<b>Always send a return receipt</b>	The option allows sending a returned receipt to anyone under request at all times.

The **Layout** tab allows personalizing the Mail layout. By default, the **Horizontal Split** type is set. Besides, you can select the **Vertical Split** or the **No Split**.

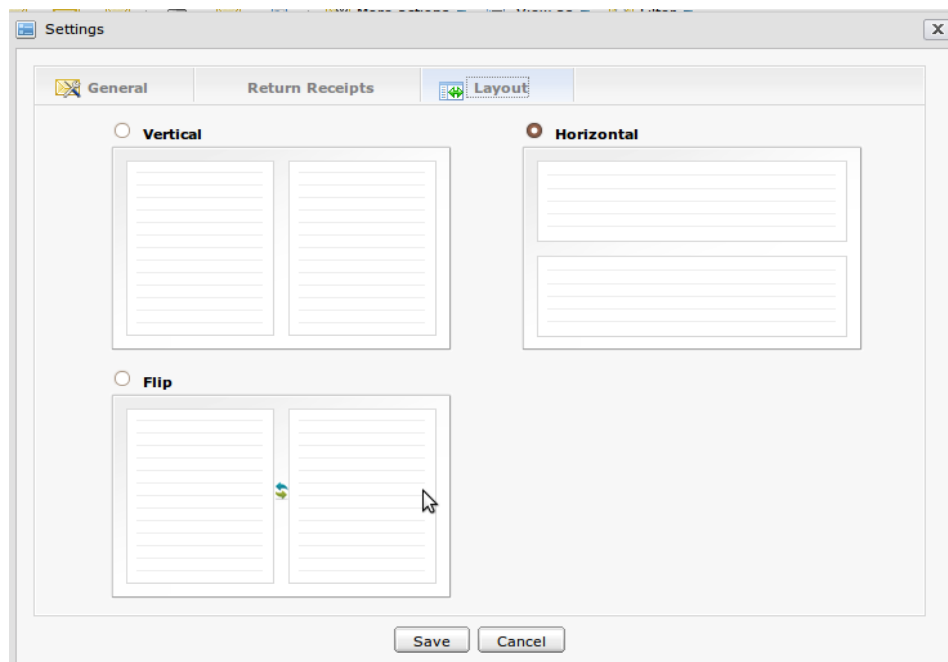


Illustration 113: The Layout tab of the Mail Settings form

**Step 2:** Change your Mail settings.

**Step 3:** Click the **Save** button to accept the changes.



## 6 Next steps

It is our hope that information stated above is valuable to you, our customers and users in the process of experiencing eXo Collaboration.

This user manual has provided a thorough explanation of features and terminologies within all the applications of eXo Collaboration.

You may have more questions or want to get involved in the eXo community. The following links can connect you with resources to learn more and contribute to the open source development process.

- Learn more about eXo Platform 3.0
- Video demos, tutorial and more in the eXo Resource Center
- Access another eXo documents in the eXo Wiki
- Ask question about the applications in the Forums

All users of eXo Collaboration and other eXo products are provided with technical support. We will answer all of your questions and listen to your wishes. If you have any problems installing or using eXo Collaboration, you can join *eXo Forum* where you will find very useful information and discussion about eXo products.