



# eXo Collaboration User Guide

## Version 2.1

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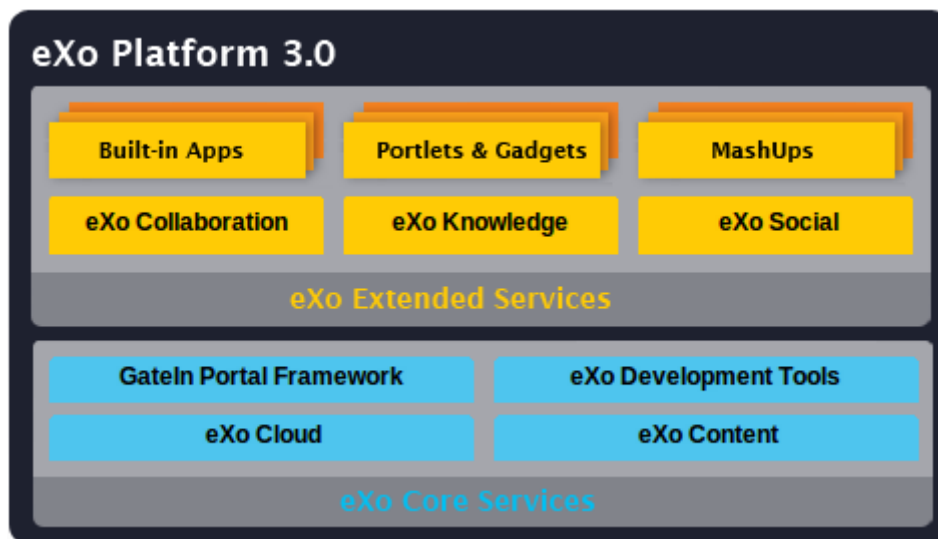
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# 1 Preface

## 1.1 Overview

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 a set of applications designed to help people involved in a common task achieve their goals and enhance the productivity in corporate environment. These applications are 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 applications in eXo Collaboration: 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 eXo Collaboration applications.
- Guide step by step to take advantage of all features in eXo Collaboration.

### About the structure of this user guide:

This user guide contains 4 main chapters. Each chapter is dedicated to a Collaboration application. You can use these quick links below to jump to the desired section.

- [Learn how to use eXo Collaboration Address book](#)
- [Learn how to use eXo Collaboration Chat](#)
- [Learn how to use eXo Collaboration Calendar](#)
- [Learn how to use eXo Collaboration Mail](#)

## 1.3 References & related resources

### Related Documents

- [eXo GateIn User Guide 3.1](#)

### Information

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

### Support

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

### Download

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- [eXo Development tools](#)
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## 2 eXo Collaboration Address Book

### 2.1 Get started

#### 2.1.1 What is eXo Collaboration Address Book?

Collaboration Address Book is a contact manager that allows you to organize all the contact information (contact name, company name, address, email, phone number, and more). More importantly, because it's part of eXo Collaboration, you can use the contact information in other Collaboration applications, such as eXo Collaboration Mail, Calendar and Chat. The integration of Address book and other applications in eXo Collaboration really helps you improve group productivity when you have to work in collaborative environment.

#### 2.1.2 What you can do with eXo 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 Address Book

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

To access Address Book, click  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:

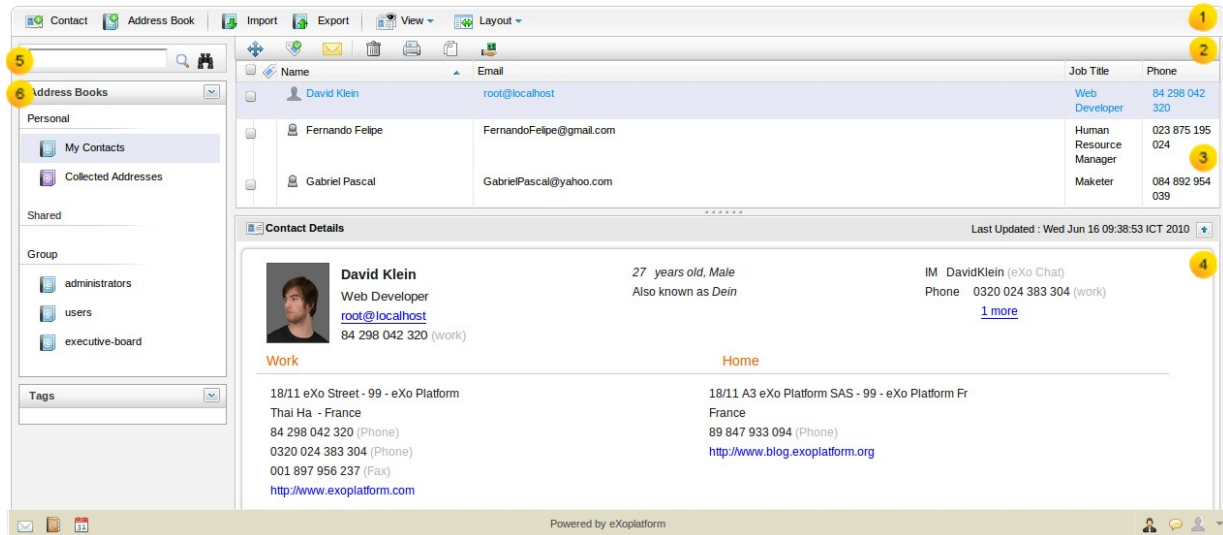


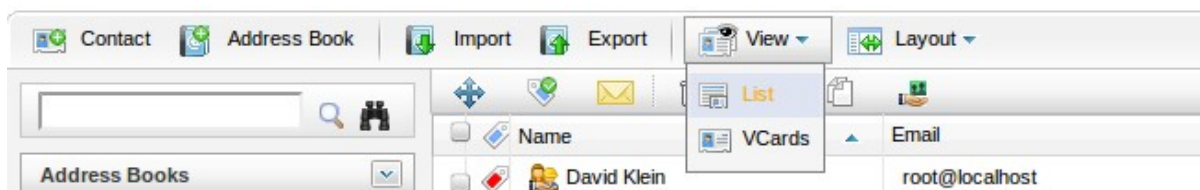
Illustration 1: The main screen of the Address Book application

### Details

1	The <b>Toolbar</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 pane</b> which displays detail information of the selected contact.
5	The <b>Navigation pane</b> which contains search pane, address books list and tags list.
6	The <b>Search pane</b> which allows you to do the quick and advanced search to find contacts.

## 2.1.5 Contact view modes

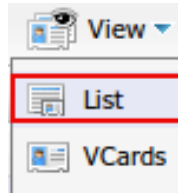
This function allows personalizing your contact view from many different view types, available for selecting. At present, your contacts can be viewed in 2 modes: List or vCards.



### 2.1.5.1 List View

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

On Main toolbar, click **View** icon then select **List** in the drop-down menu:




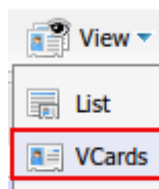
The contacts are displayed in the list below:

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** on the toolbar, then select **vCards** in the drop-down menu:



The contact details will be displayed like the illustration below:

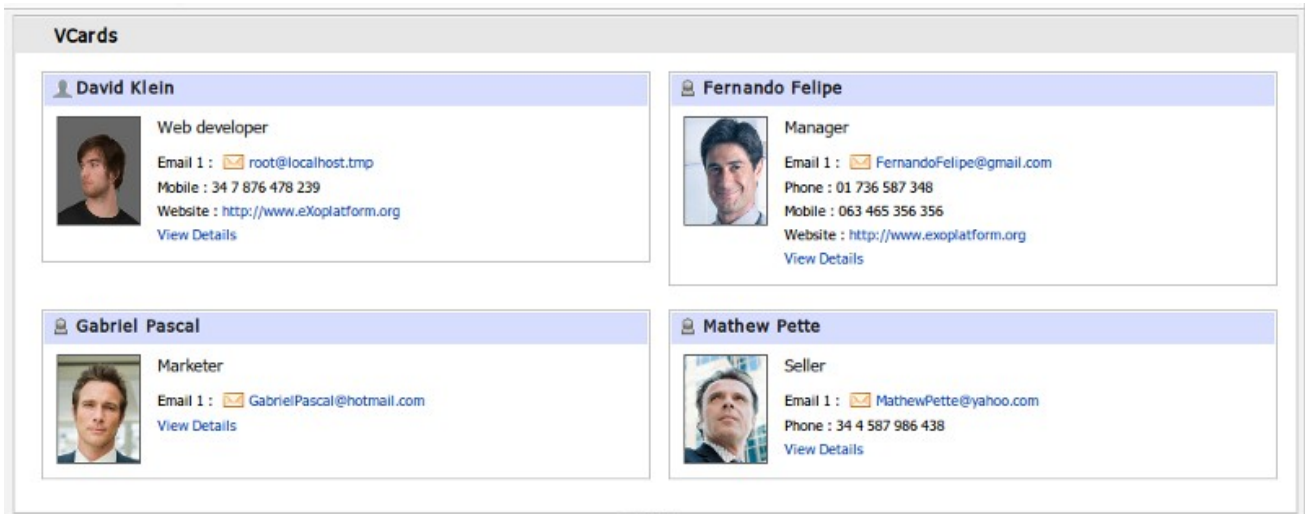
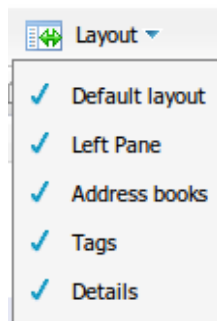


Illustration 3: The vCards View form

## 2.1.6 Change 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 toolbar 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 be viewed by its creator.

- **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 does not exist 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

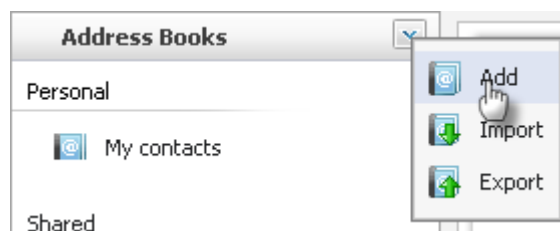
### 2.2.1 Create new address book

- ✓ To create an address book:

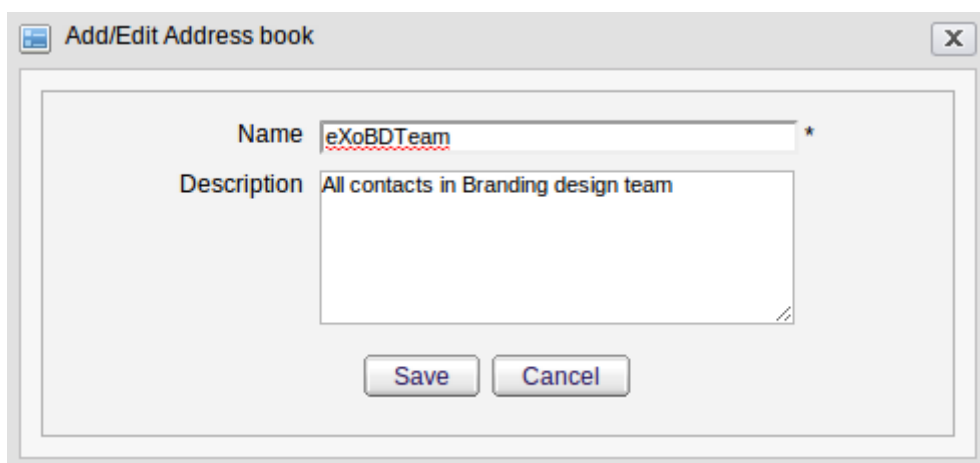
**Step 1:** Open the **Add Address book** form. There are three ways to do this step:

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

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



The **Add/Edit Address book** form will appear:

A screenshot of the 'Add/Edit Address book' dialog box. It has a title bar with a minus, maximize, and close button. Inside, there are two fields: 'Name' with the text 'eXoBDTeam' and a red dashed underline, and 'Description' with the text 'All contacts in Branding design team'. At the bottom, there are 'Save' and 'Cancel' buttons.

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

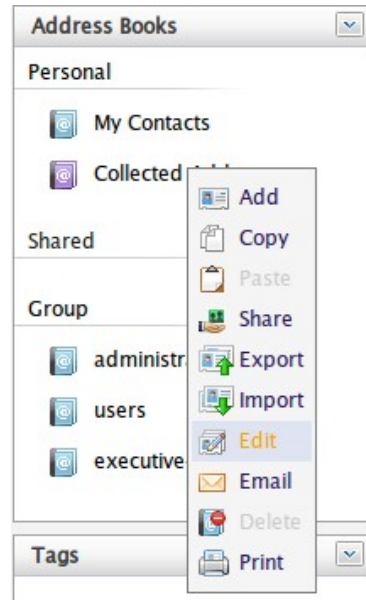


*You can also create a new address book from the eXo Collaboration Mail*

## 2.2.1 Edit an address Book

- ✓ To edit an address book:

**Step 1:** Right-click 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.

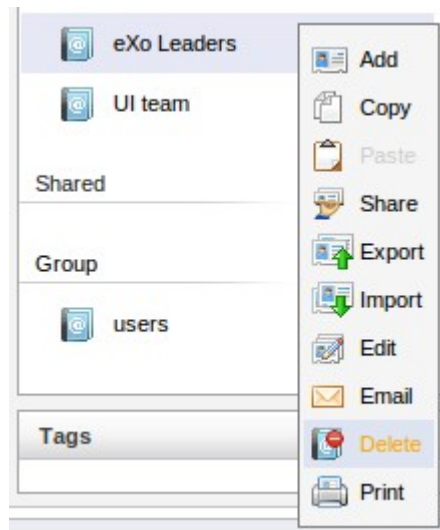


You can only edit a personal address book or a shared address book if you have the edit permission. You can not edit a group address book.

## 2.2.2 Remove an address book

- ✓ To remove an address book:

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



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



- You can not 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

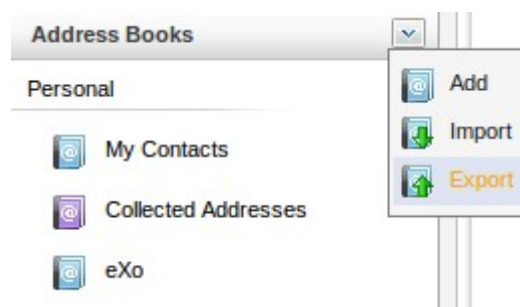
This function allows exporting one or more address books into a separate file to backup your address book or import it into another address book application.

### ✓ To export an address book:

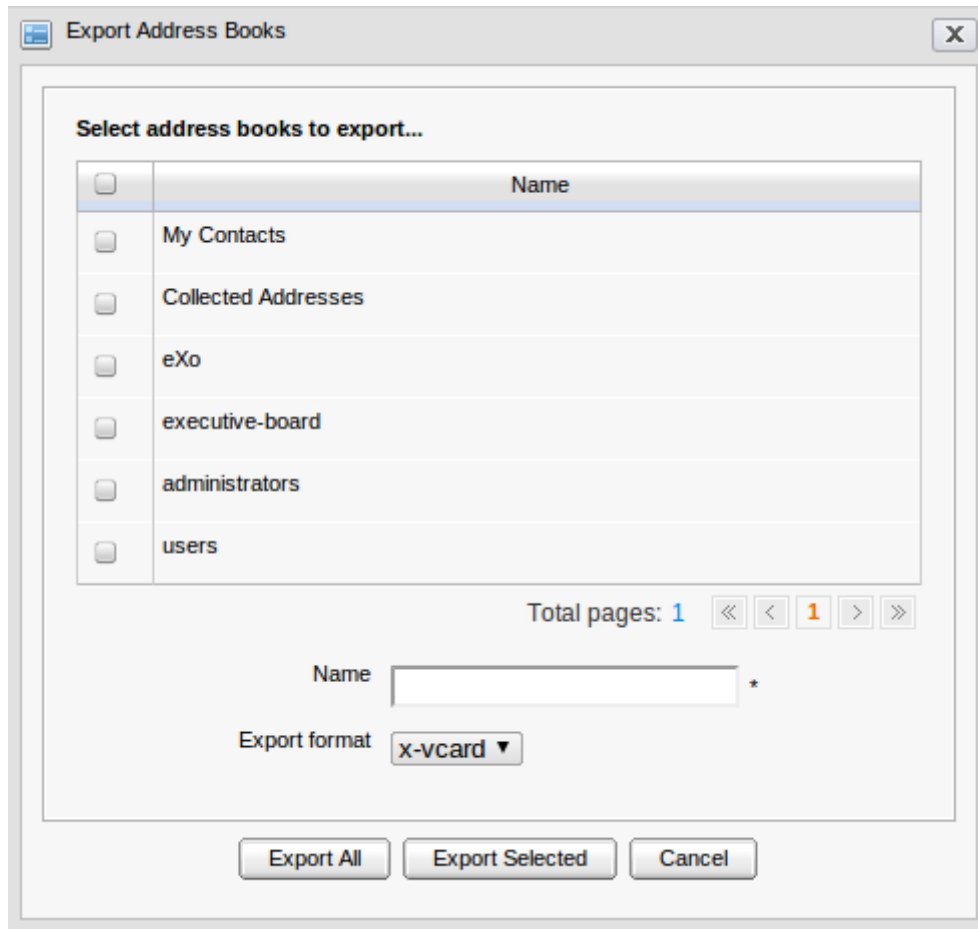
**Step 1:** Open the **Export Address Books** form. There are two ways to do this step:

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

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



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



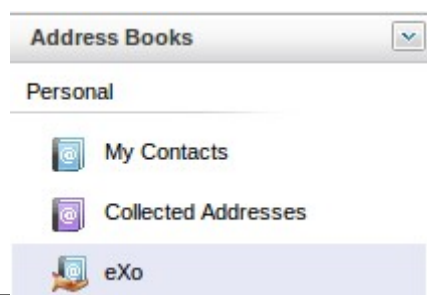
**Step 2:** Select the address book which you want to export by selecting its corresponding checkbox (you can select the top checkbox to select all).

**Step 3:** Enter a file name and select the export format for the imported file (for example, x-vcard)

**Step 4:** Click **Export All** to start exporting all the address books or click **Export Selected** to export the selected ones only.

## 2.2.4 Share an address book

This feature allows you to share your personal address books with specific user groups. Other users can view, export, add, edit or delete an shared address book (if they has the edit permission on it). The shared address book is distinguished from the other address books by a hand symbol:





✓ **To share a personal address book:**

**Step 1:** Right-click the address book you want to share and select **Share** in the pop-up menu:



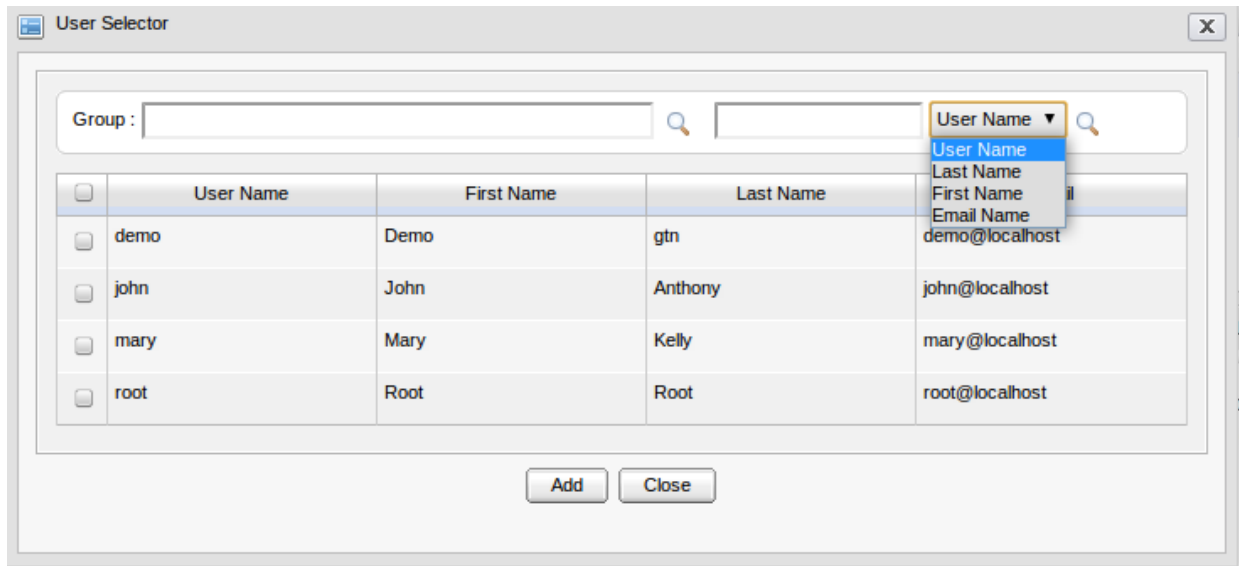
The **Share address book** form will appear:

A screenshot of the 'Share Address Book to other users' dialog box. The dialog has a title bar with a close button. It contains a table with columns 'Shared to', 'Can edit?', and 'Actions'. Below the table, it says 'Empty data'. There are two input fields: 'User' and 'Group', each with a user icon to its right. Below these fields is a 'Can edit?' checkbox. At the bottom are 'Save' and 'Close' buttons. Two red callout boxes with white text point to the user and group icons: 'Share with user' points to the user icon, and 'Share with group' points to the group icon.

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

✓ **To select Users for sharing:**


Click the  icon. The **User Selector** form appears:



The User Selector dialog box contains a search bar at the top with a 'Group' label and a search icon. Below the search bar is a table with columns: User Name, First Name, Last Name, and Email Name. The table lists four users: demo, john, mary, and root. Each user has a checkbox in the first column. A dropdown menu is open over the 'User Name' column, showing options: User Name, Last Name, First Name, and Email Name. At the bottom of the dialog are 'Add' and 'Close' buttons.

	User Name	First Name	Last Name	Email Name
<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

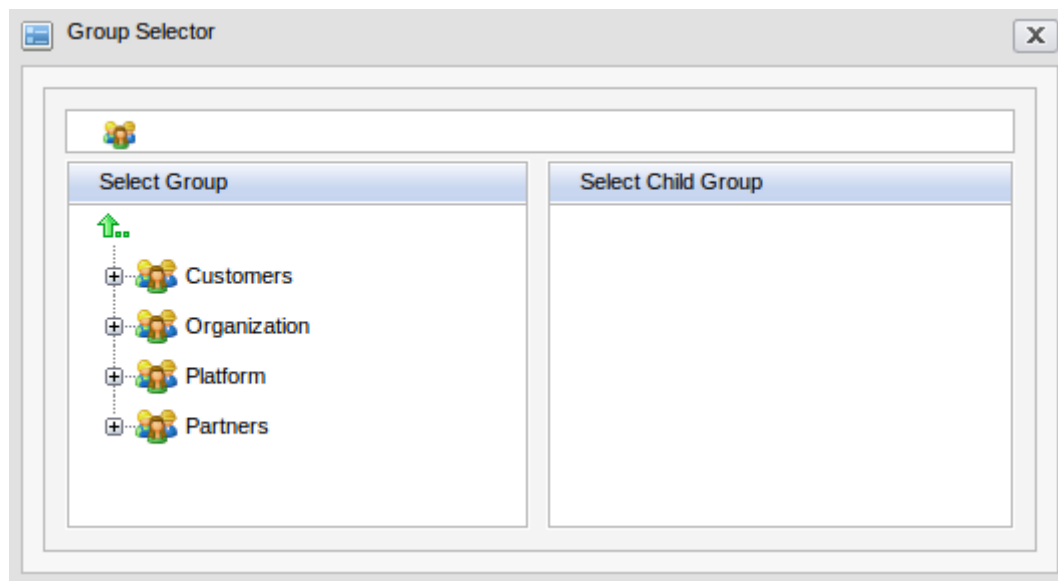
Select users to share by clicking on the corresponding checkboxes.

You can also select specific users by User name, Last name, First name, Email. Type the search term in the search box then click the magnify icon  to search.

Click the **Add** button to add selected users to the shared list,

✓ **To select a group for sharing:**

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



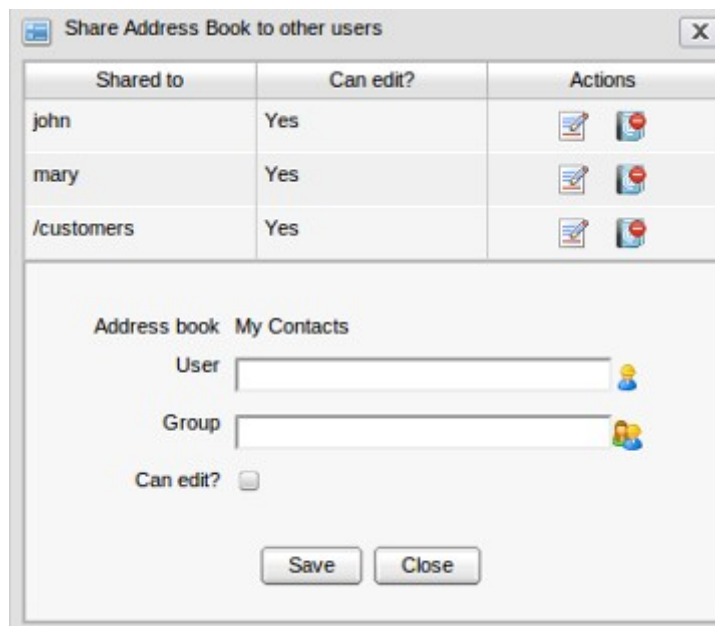
The Group Selector dialog box has two panes. The left pane, titled 'Select Group', shows a tree structure with a green arrow icon at the top. The tree has four items: Customers, Organization, Platform, and Partners, each with a group icon and a plus sign. The right pane, titled 'Select Child Group', is currently empty.

**Step 3:** Select a group in the left pane then select its child group in the right pane.

**Step 4:** Click **Save** to accept sharing with the selected user/group.

Check the “**Can edit?**” checkbox if you want to grant edit permission on this shared address book to the selected user/group. The user/groups with the Edit permission can view export, import, add, edit and delete the shared address books.

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



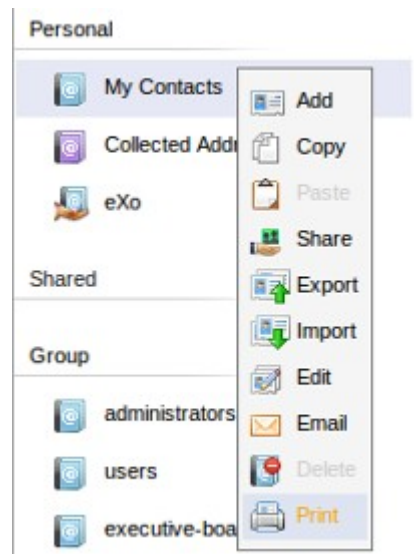
You can click the **Edit** icon to change the edit permission of corresponding user/group or click the **Remove** icon to remove specific user/group from the Share list.

## 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 an address book:

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



The print preview page will appear:



Illustration 4: The vCards Print Preview form

**Step 2:** Click the **Print** button to start printing.

## 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:**

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

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

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

**The 3<sup>rd</sup> way:** You can also [5.4.1.4.2 Add a new contact from eXo Collaboration Mail](#).

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

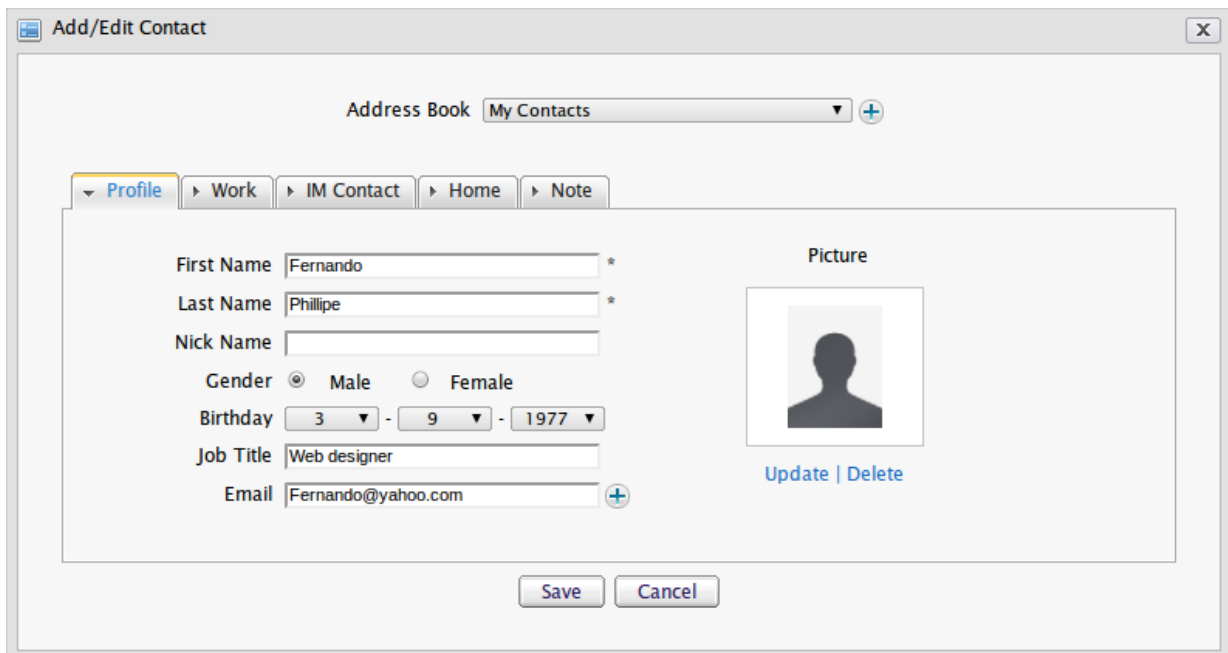


Illustration 5: The Add/Edit Contact form

**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


change avatar



delete avatar

add new email address

Illustration 6: The Profile tab of the Add/Edit Contact form

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


Click the icon  at the **Email** field if you want to adding more email addresses for the contact:

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

- ✓ The **Work** tab:

The screenshot shows the 'Add/Edit Contact' window with the 'Address Book' dropdown set to 'My Contacts'. The 'Work' tab is selected, showing a form with the following fields: Address, City, State/Province, Postal Code, Country, Phone, Phone (secondary), Fax, Mobile, and Web Page. At the bottom are 'Save' and 'Cancel' buttons.

Illustration 7: The Work tab of the Add/Edit Contact form

- ✓ In the IM Contact tab you can enter information about contact chat identity. (IM stands for instant message). The default text messaging (chat) service is eXo Chat. You can click the  icon to select other services.

The screenshot shows the 'Add/Edit Contact' window with the 'IM Contact' tab selected. The 'eXo Chat' field is visible. A dropdown menu is open, showing a list of chat services: Google Talk, MSN, AOL/AIM, Yahoo, IRC, Skype, and ICQ. At the bottom are 'Save' and 'Cancel' buttons.

Illustration 8: The IM Contact tab of the Add/Edit Contact form

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

The screenshot shows the 'Add/Edit Contact' dialog box with the 'Home' tab selected. The 'Address Book' dropdown is set to 'My Contacts'. The 'Home' tab is highlighted in blue. The form contains the following fields:

- Address
- City
- State/Province
- Postal Code
- Country
- Phone
- Phone (secondary)
- Fax
- Website

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

The screenshot shows the 'Add/Edit Contact' dialog box with the 'Note' tab selected. The 'Address Book' dropdown is set to 'My Contacts'. The 'Note' tab is highlighted in blue. The form contains a large text area for the note, with a 'Note' label to its left. At the bottom, there are 'Save' and 'Cancel' buttons.



## 2.3.2 Edit contact information

You can update information of selected contacts whenever you want. You can only edit a contact of the personal or shared address books (if you have edit permission).

✓ **To edit a contact:**

**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 of selected contact:

Illustration 9: The Add/Edit Contact form with full filled information, available for editing

**Step 2:** Make changes as you wish then click **Save** to accept..



You can also [5.4.14.3 Edit a contact in eXo Collaboration Mail](#)

## 2.3.3 Delete a contact

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

You can delete a contact in a number of ways:

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

**Step 1:** Right-click a contact you want to remove then click **Delete** in the pop-up menu.

**Step 2:** Click **Delete** on the confirmation message that appears.

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

**Step 1:** Select multiple contacts by checking their corresponding checkboxes then

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

**Step 2:** Click **Delete** on the confirmation message that appears.



You can also [5.4.14.4 delete a contact in eXo Collaboration Mail](#).

## 2.3.4 Copy/paste a contact

If you would like to have contacts stored in different address book, the copy/paste feature should be useful. You can easily make the copies of contacts from an address book to store in another.

**The 1<sup>st</sup> way:** Select the multiple contacts to copy by checking their corresponding

checkboxes, then click the **Copy** icon  on the action bar.

**The 2<sup>nd</sup> way:** Copy all contacts of an address book by right-clicking on that address book then select **Copy** in the pop-up menu.

Right-click the destination address book that you want to move selected contacts to and click **Paste** in the pop-up 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

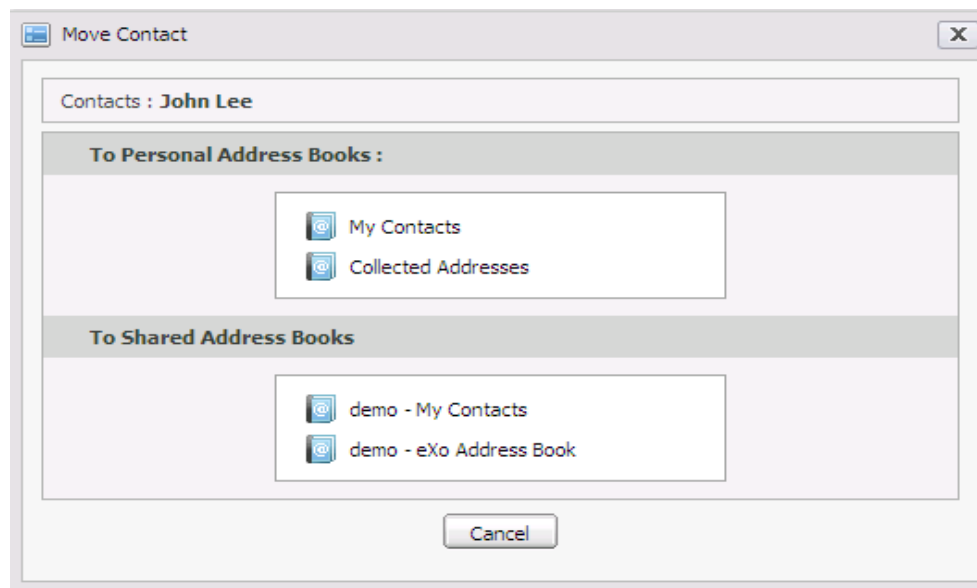
This function allows you to move one or more contacts from one address book to another.

✓ **To move a contact:**

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

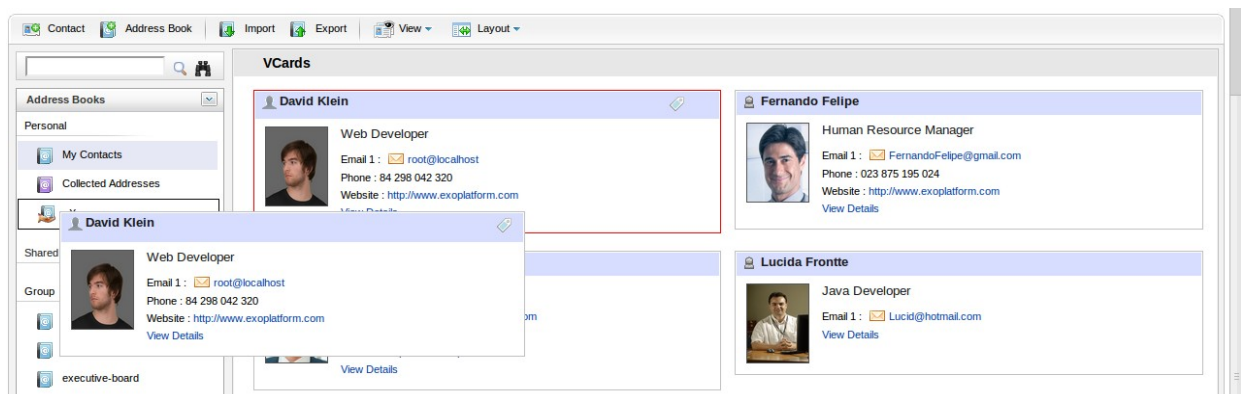
**The 2<sup>nd</sup> way:** Select contact you want to move then click the **Move** button  **Move** on the action bar.

The **Move contact** form will appear:



Click the destination address book where the contact will be moved to.

**The 3<sup>rd</sup> way:** Use drag and drop to move one or more contacts to the new address book.



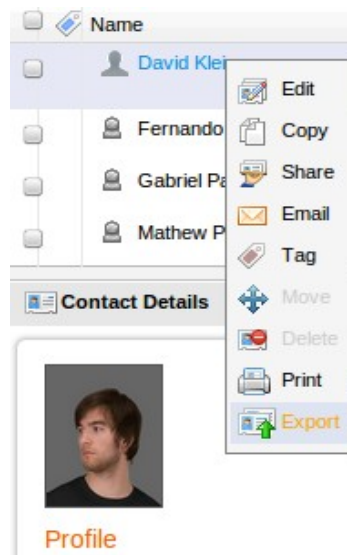
You can only move contacts of personal or shared address book if you have the edit permission. You cannot move contacts in the address book which you do not have edit permission or contacts in public address book.

## 2.3.6 Export contacts

This function allows you to export one or more contacts into a file to be used in another address book applications. These exported contacts will have the same information in all address book you use. You can export a single contact or multiple contacts flexibly.

### ✓ To export a contact:

**Step 1:** Right-click contacts or address book, then select **Export** in the pop-up menu:



The **Export Contacts** form will appear:

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

**Step 2:** Select contacts to export by selecting corresponding checkboxes.


**Step 3:** Enter the 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.

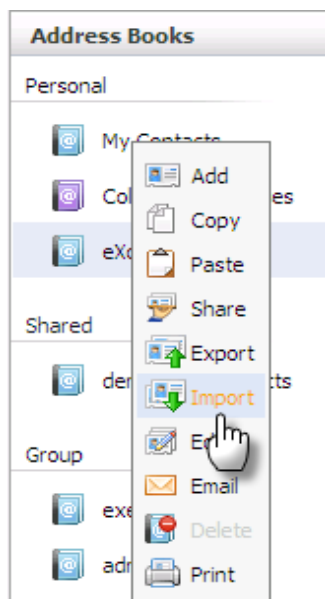
## 2.3.7 Import contacts

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

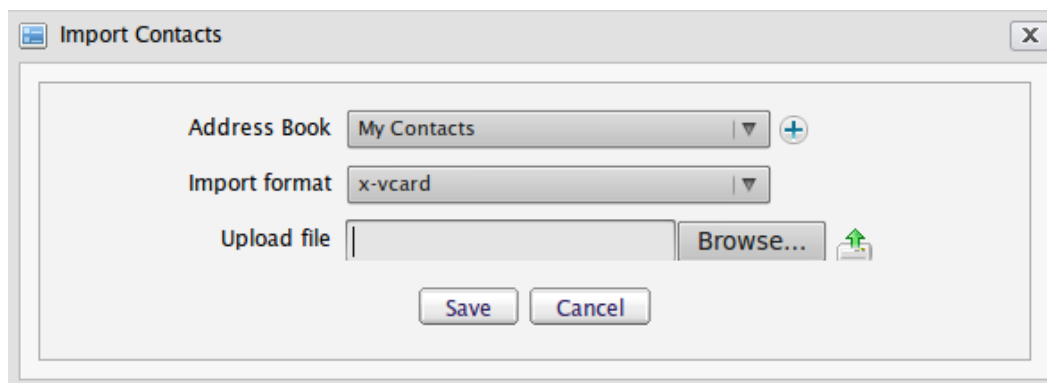
✓ **To import contacts:**

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


**The 2<sup>nd</sup> way:** Right-click a personal or shared address book which you have the Edit permission, then click **Import** in the pop-up menu. By this way, you can quickly select the destination address book that will import contacts:




The **Import contact** form will appear:

A screenshot of the 'Import Contacts' dialog box. It contains the following fields and buttons:

- Address Book:** A dropdown menu showing 'My Contacts' with a '+' icon to its right.
- Import format:** A dropdown menu showing 'x-vcard'.
- Upload file:** A text input field followed by a 'Browse...' button and a file upload icon.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

**Step 1:** Select an address book that you want to import contacts to or click  to quickly create new address book.

**Step 2:** Select the file format in the **Import format** field.

**Step 3:** Browse to the file in your computer and click the **Upload** icon  to upload the selected file.

**Step 4:** Click **Save** to complete.



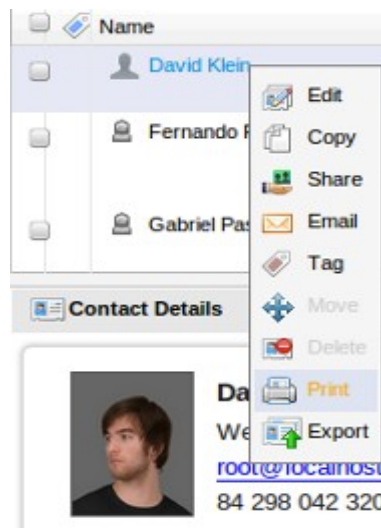
*You can only import contacts to personal or shares address books if you have edit permission.*

## 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:

**Step 1:** Right-click a contact you want to print then click **Print** in the pop-up menu:



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



**David Klein**  
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)

**Work**

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

**Home**

18/11 A3 eXo Platform SAS - 99 - eXo Platform Fr  
France  
89 847 933 094 (Phone)  
http://www.blog.exoplatform.org

**Note**

Print


Cancel


Illustration 10: The Single contact print preview

**Step 2:** Click the **Print** button to print.

When you are in vCards view, the process is quite different. Firstly, you have to click **View Details** to display the detailed information. After that, click **Print** to print the selected contact.

**VCards**









**David Klein**  
Web Developer  
Email 1 :  root@localhost  
Phone : 84 298 042 320  
Website : http://www.exoplatform.com  
[View Details](#)

✓ **To print multi-contacts:**

**Step 1:** Select contacts you want to print by selecting their corresponding checkboxes, and

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



☒

☒

☒

☒

Name

David Klein

Fernando Felipe

Gabriel Pascal

**Print**

The multiple contacts print preview will appear with summary information:



**Step 2:** Click **Print** to print selected contacts.

### 2.3.9 Share contacts

This function allows you to share contacts with other users or 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.

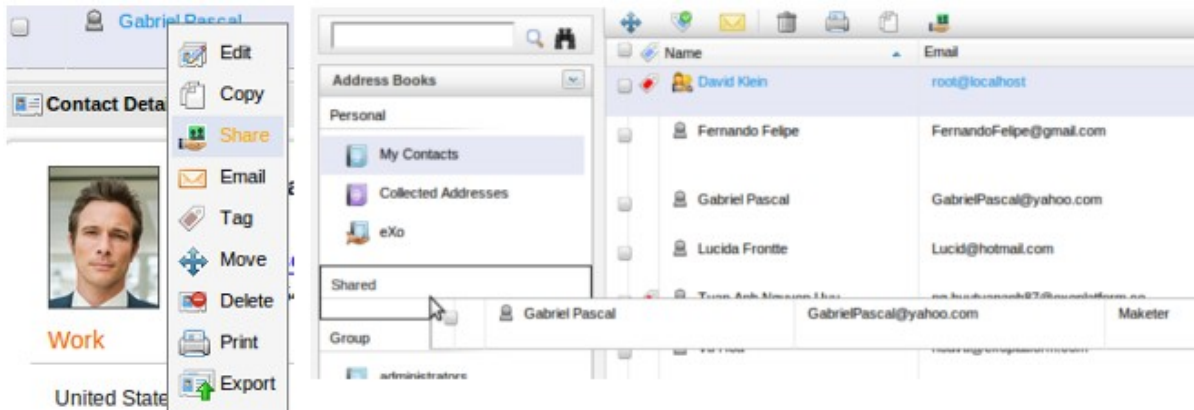


*The shared users can move or delete the shared contacts from their Address Book only. The original shared contact still exists in the other shared user's contact view. The shared contact is only deleted completely and no longer sharing with all shared if the creator/author of the shared contact removes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

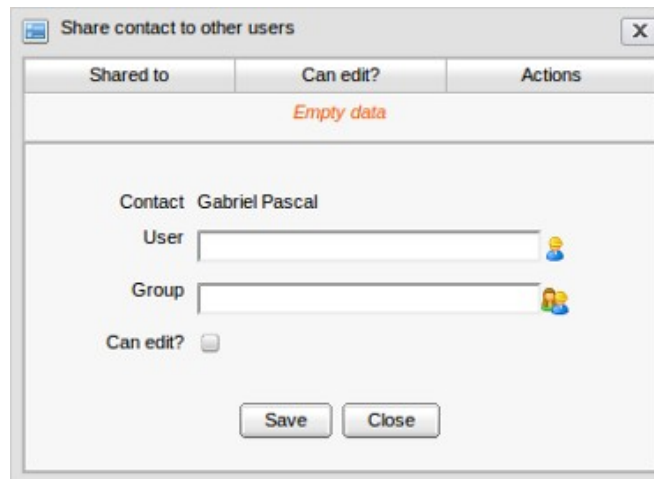
✓ **To share contact with other users:**

**Step 1:** Right-click the contact you want to share and click **Share** in the pop-up menu. You can also drag and drop this contact to **Shared Address** book in the **Address Book** pane:



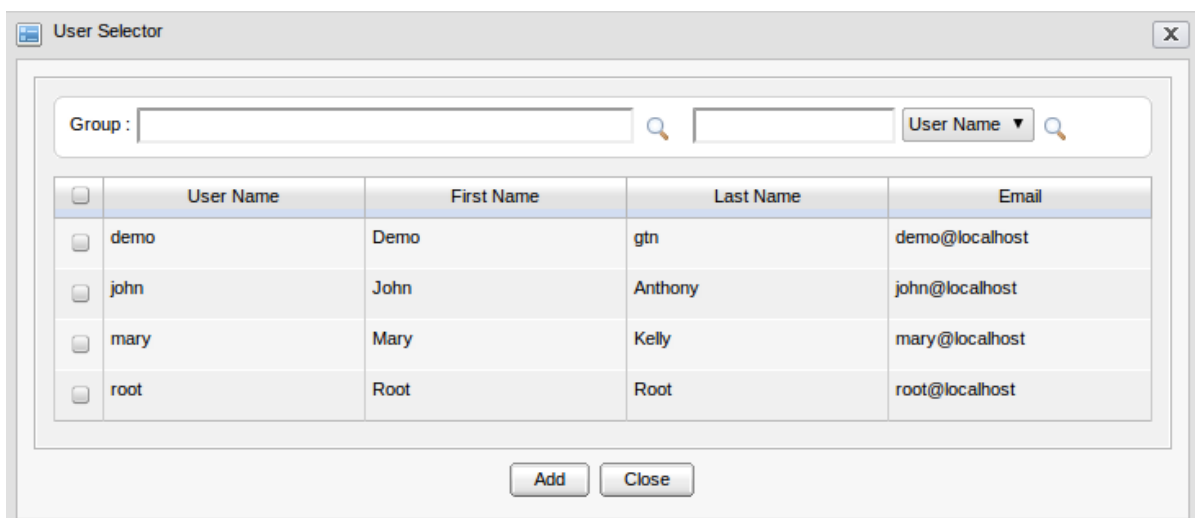


The Share contact to other users form will appear:



## Step 2:


- ✓ To select users that you want to share, click the user icon  :

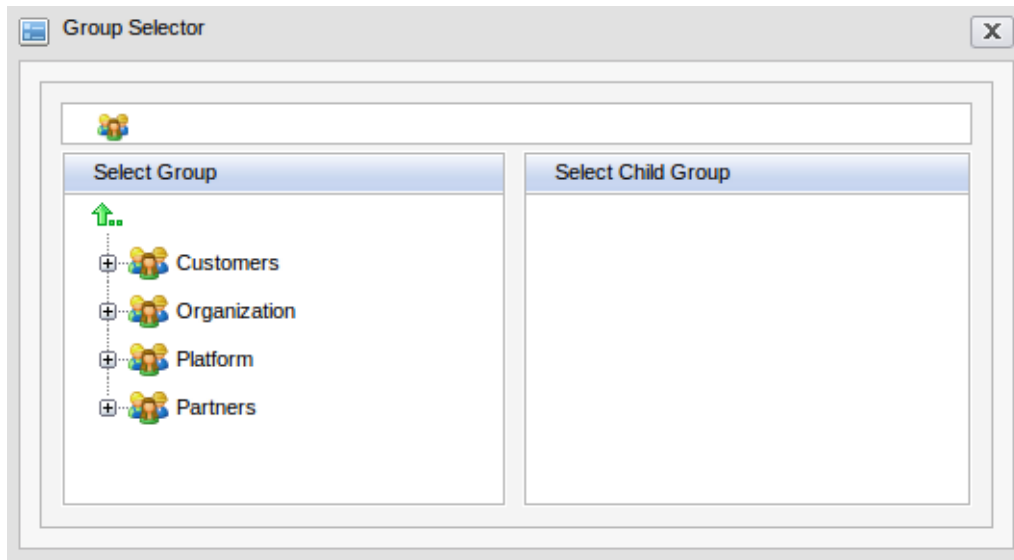


	User Name	First Name	Last Name	Email
<input type="checkbox"/>	demo	Demo	gtn	demo@localhost
<input type="checkbox"/>	john	John	Anthony	john@localhost
<input type="checkbox"/>	mary	Mary	Kelly	mary@localhost
<input type="checkbox"/>	root	Root	Root	root@localhost

Illustration 11: User selector form

Select user to share then click **Add**.

- ✓ To share a contact with groups, click the group icon . The **Group Selector** form will appear:

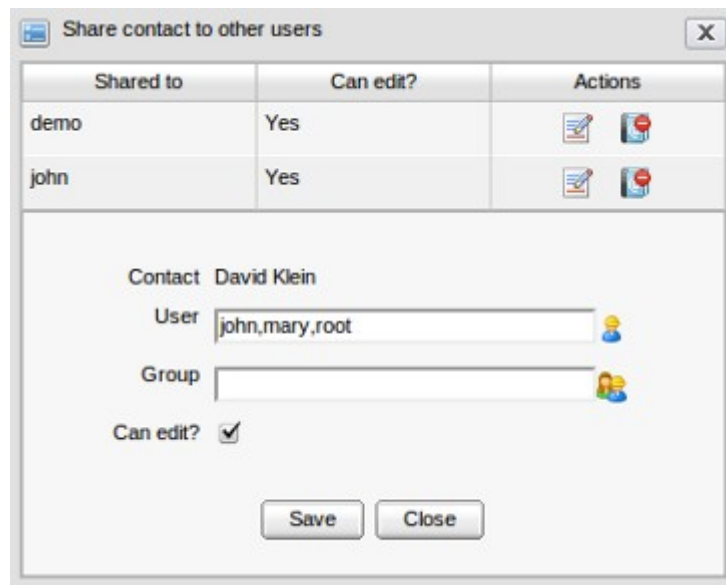


Select the group from the left pane, then select its child group in the right pane.

**Step 3:** Click **Save** to accept sharing with the selected users.

Select the 'Can edit?' checkbox 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.

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



Click if you want to change the edit right of specific user/group(s). Click icon to remove the corresponding user/group.

### 2.3.10 Send mail to a contact

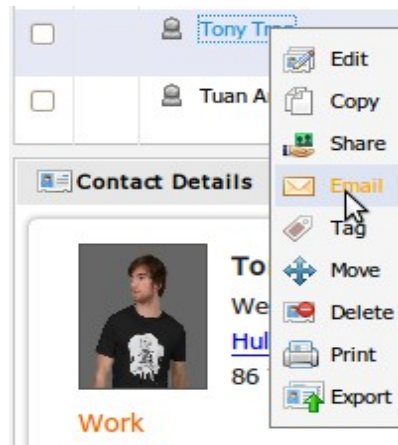
This function allows you to send a mail directly to one or more contacts in your address book. To take this action, you firstly need to:


1. Add at least one account in eXo 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.

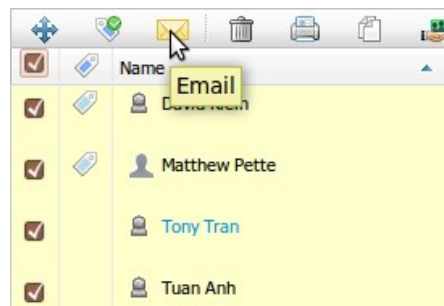
✓ **To send mail to a contact:**

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

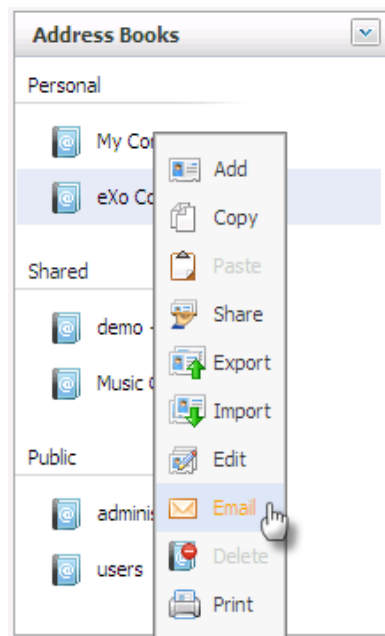
**The 1<sup>st</sup> way:** Right-click the contact which you want to send a mail to and select **Email** in the drop-down menu:



**The 2<sup>nd</sup> way:** Select the contacts that you want to send mail by selecting the corresponding checkboxes, then clicking the **Email** icon  on the action bar:



**The 3<sup>rd</sup> way:** Right-click the address book and select **Email** in the pop-up menu. By this



way, you will send mail to all contacts in that address book.

After follow one of these above method, the **Send mail** form will appear:

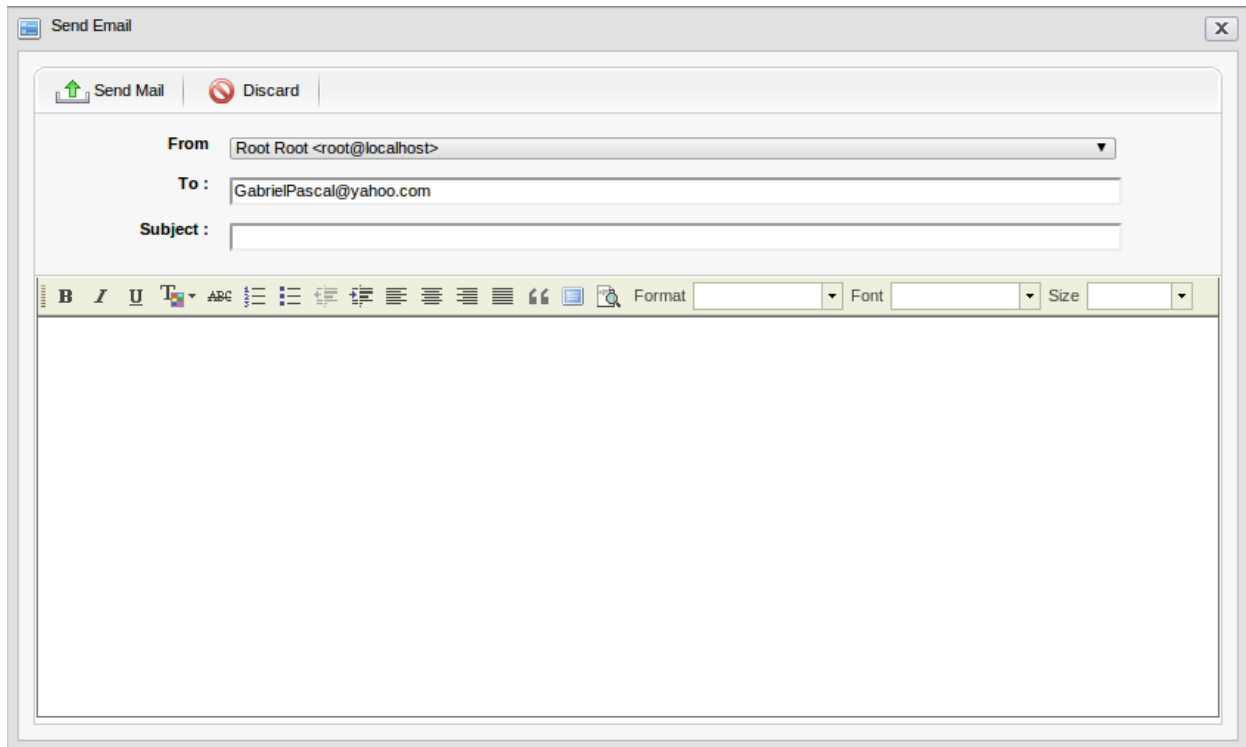
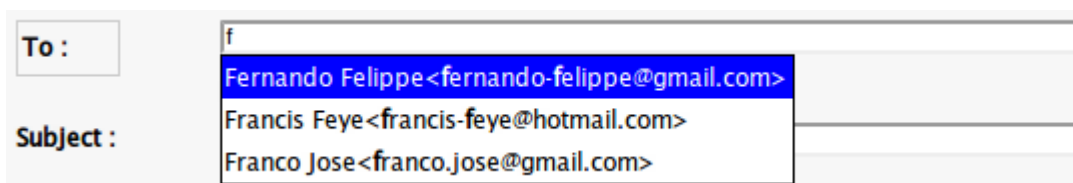


Illustration 12: The Send mail form

**Step 2:** Input the recipient email address if needed.

When the mail address you're typing matches one or more addresses in your eXo Collaboration Address book, the list of matching mail addresses will appear as a pop-up and you can click to select the address you want.



**Step 3:** Enter subject and content of your message.

**Step 4:** Click the **Send Mail** button to send.

### 2.3.11 Search contacts

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

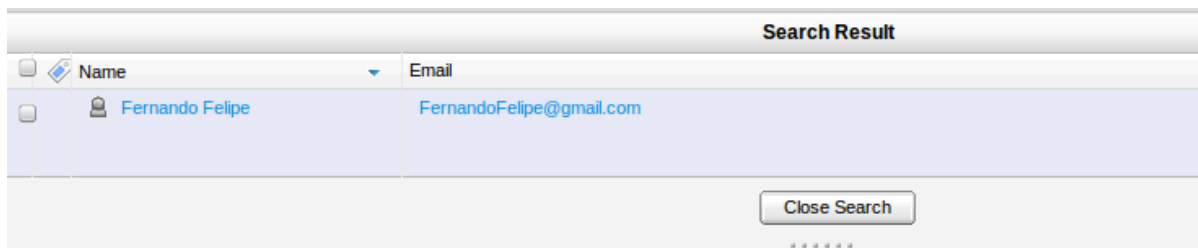
**To do a quick search:**

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



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

The search results will be displayed in the right pane:



### 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.

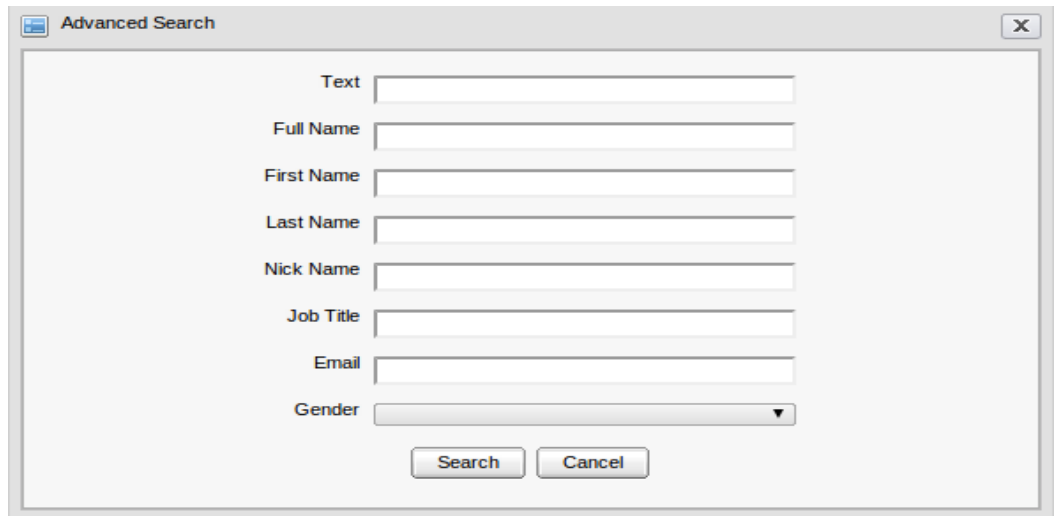


Illustration 13: The Advance Search form

The **Advanced Search** form will appear:

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 search. All contacts which satisfy your criteria will be shown in the **Search Result** dialog.

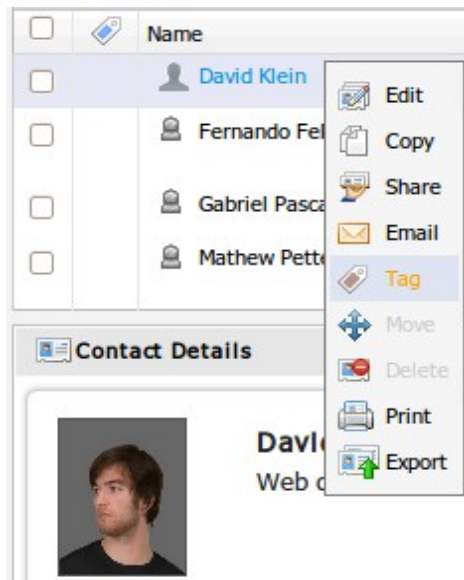
## 2.4 Tag


Tags are used as labels which help you filter or categorize your contacts from different address books to make it easy to retrieve them later. Collaboration Address Book allows assigning tags to specific contacts. A single contact can be assigned to different tags at the same time.

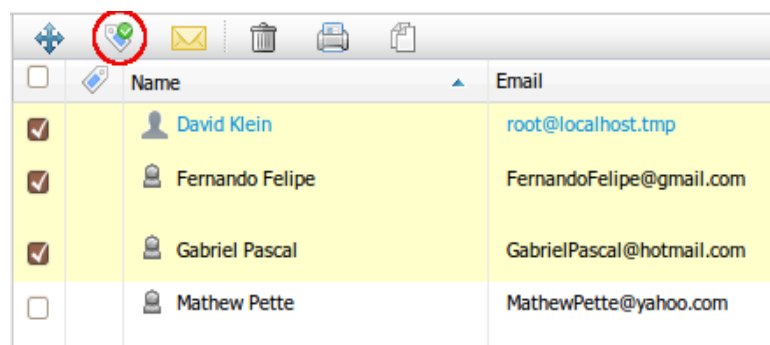
### 2.4.1 Tag a contact

- ✓ **To tag a contact:**

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



**The 2<sup>nd</sup> way:** Select the contacts by selecting their corresponding checkboxes, then click the **Tag** icon  on the action bar:



**The 3<sup>rd</sup> way:** Drag and drop contacts to specific tag in the Tag list in the left pane.

After following one of these above methods, the **Add/Remove Tag** form will appear:

A screenshot of the 'Add/Remove Tag' dialog box. It has a title bar with 'Add/Remove Tag' and a close button. The main area contains a label 'Contact Hoa Hoa : eXo Tag'. Below it are two input fields: 'Tag' (text) and 'Color' (color picker). There are three checkboxes: 'eXo Tag', 'Jira Tag', and 'Wiki Tag'. At the bottom are three buttons: 'Add', 'Remove', and 'Cancel'.

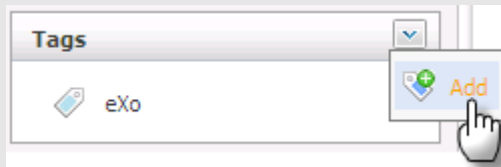
In the Add/remove Tag you can add new tag, remove assigned tags or assign new tag to



contact.



To add tag without the contact list included, click the “Add new tag” icon at left pane: 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 tag

- ✓ To edit a tag:

**Step 1:** Right-click a tag in the tag space and click **Edit** in the pop-up menu.

The **Edit tag** form will appear:

**Step 2:** Make changes to the tag then click **Save** to accept the changes.

## 2.4.3 Delete tag

- ✓ To delete a tag:

**Step 1:** Right-click a tag you want to delete then click **Delete** in the pop-up menu

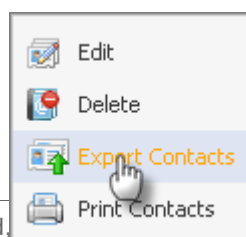
**Step 2:** Click **OK** in the confirmation message that appears.

## 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 contacts in tag:

**Step 1:** Right-click 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 ticking their corresponding checkboxes.

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

**Step 4:** Click **OK** to accept exporting.

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 select contacts in specific tag to be printed.

✓ **To print contacts in one tag:**

**Step 1:** Right-click 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 start the printing.

## 3 eXo Collaboration Calendar

### 3.1 Get started

#### 3.1.1 What is eXo Collaboration Calendar?

The Calendar application 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 eXo 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 eXo Collaboration Calendar?

eXo 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 Calendar application

When you had an account, you can access the Calendar application and use all its features. To

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



or you can go to your Space and click the Calendar application:



### 3.1.4 Calendar interface

Calendar interface has six basic components:

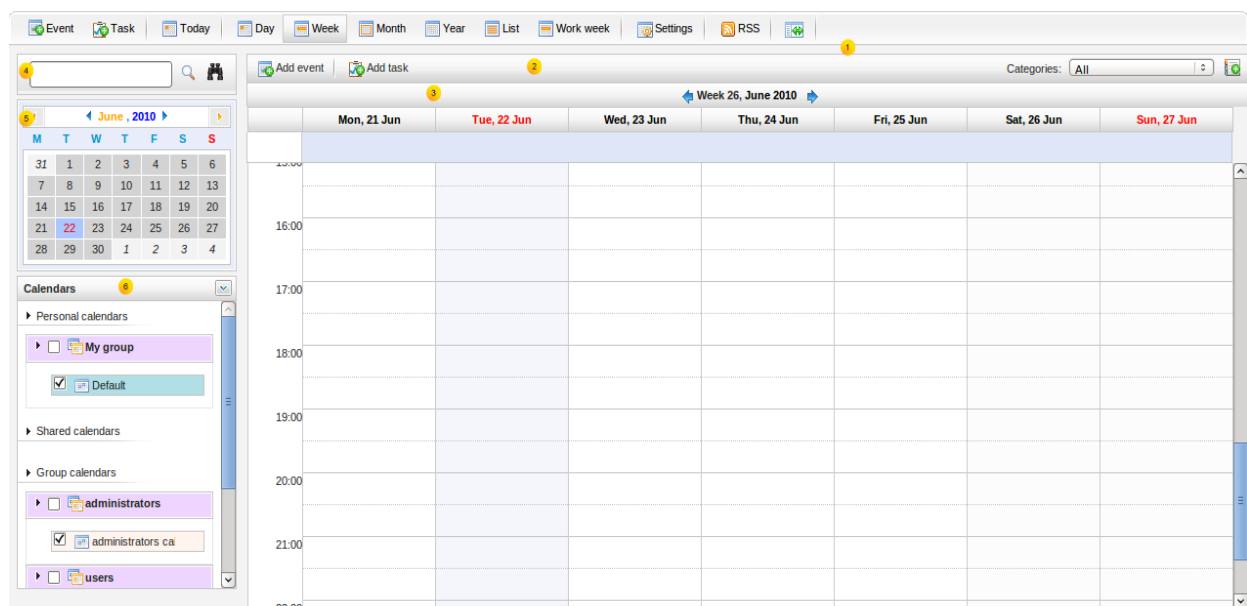


Illustration 14: The main screen of Calendar portlet

Details:

Indicator	Meaning
1	The <b>Toolbar</b> where you can find the most used actions in Calendar: Add Event/Task, change view mode, and more.
2	The <b>Action bar</b> that allows adding detailed events/tasks and adding new categories.
3	The <b>Calendar view pane</b> that displays all event/task(s) in the current calendar.
4	The <b>Search Pane</b> that allows searching event/task in calendar.
5	The <b>Mini Calendar</b> that allows quickly viewing event/task in the selected day. You can select if this Mini Calendar is shown/hidden.
6	The <b>Calendar list</b> that shows the personal calendar, shared calendar and group calendar.



*In Platform, by default, the left pane of Calendar is hidden. To show this pane, click the toolbar and select **Toggle Left Pane**.*


## 3.2 Manage Calendar Groups

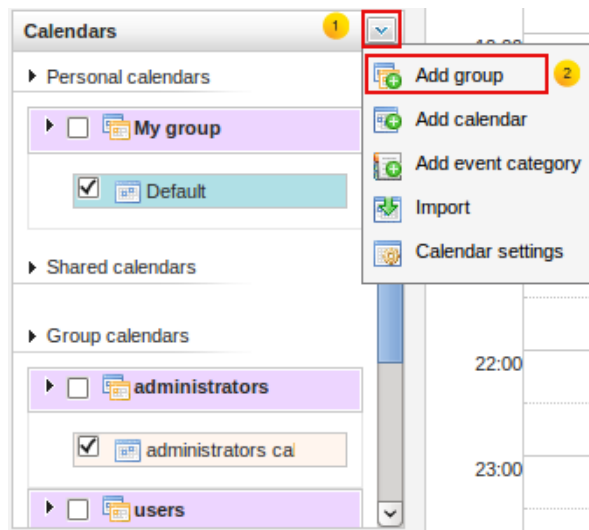
The calendar groups allows you to categorize your calendar types easily. One calendar group may contain one or more calendars added by users. By default, Calendar provides a group named "My group" in Personal calendars category.

### 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:**

**Step 1:** Click the down-arrow icon  at the right of the calendar list pane, then click **Add group** in the drop-down menu that appears:



The **Calendar groups** form will appear:

The 'Calendar groups' form is displayed in a window. It features a table with two columns: 'Group' and 'Actions'. The first row contains 'My group' and icons for editing and deleting. Below the table, there are input fields for 'Group name' (containing 'Manager') and 'Description' (containing 'Manager's calendar'). At the bottom, there are three buttons: 'Save', 'Reset', and 'Close'.

Illustration 15: The Calendar groups form

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

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 groups that you can directly edit or delete.

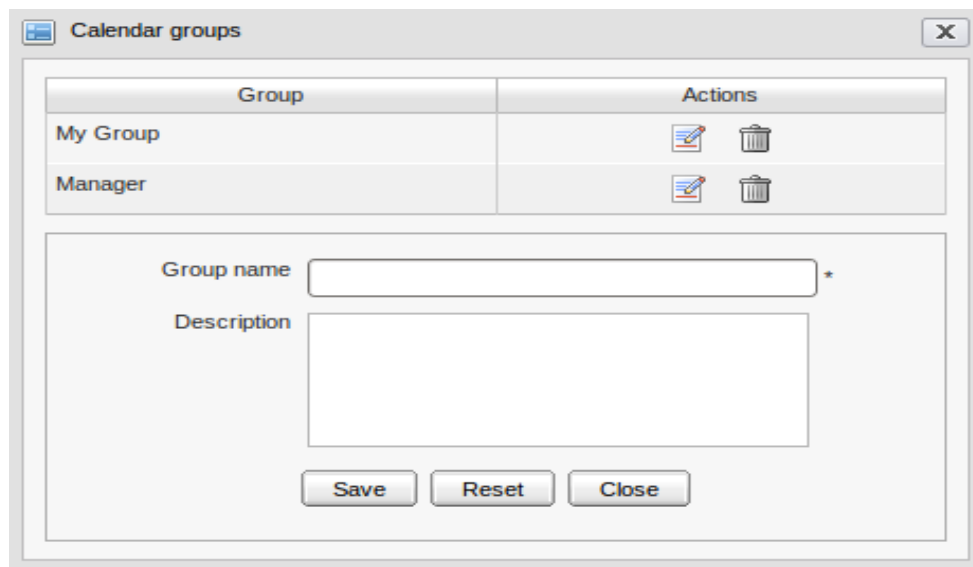


Illustration 16: The Calendar Groups form



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

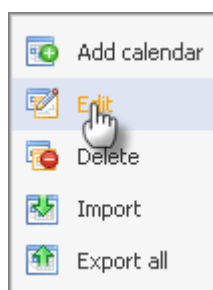
Calendar groups that do not have any calendars inside it will not be displayed in the **Personal Calendars**. When there is calendar added, they will be shown.

### 3.2.2 Edit a calendar group

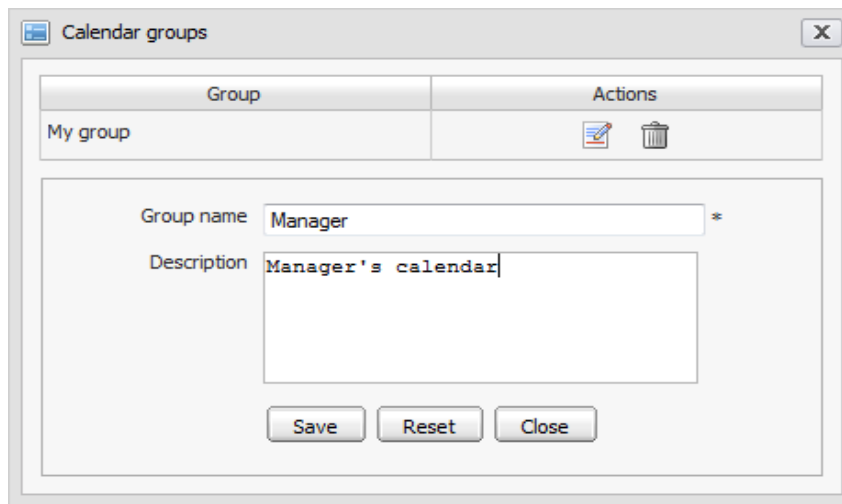
This function lets you change the name and the description of a selected group.



✓ **To edit a calendar group:**

**The 2<sup>nd</sup> way:** Right-click the group name which you want to edit and click **Edit** in the drop-down menu:



The **Calendar groups** form will appear:




Group	Actions
My group	 

Group name:  \*

Description:

**Step 2:** Make changes to the Calendar group then click **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.

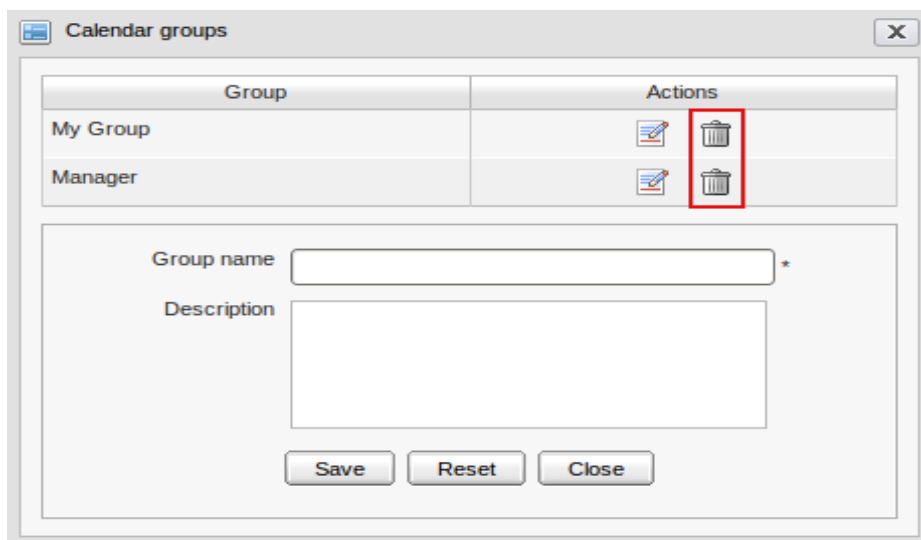
### 3.2.3 Delete a calendar group





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

✓ **To delete a calendar group:**

**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.



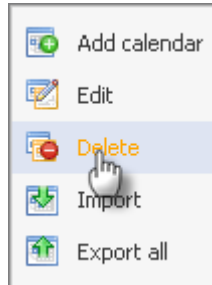
Group	Actions
My Group	 
Manager	 

Group name:  \*

Description:




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



**Step 2:** Click **OK** in the confirmation message.

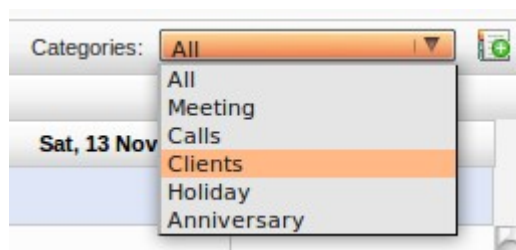
The selected calendar group will be removed from the **Group** table. Besides, the deleted group and all its calendars will not be displayed in the calendar list pane.



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.

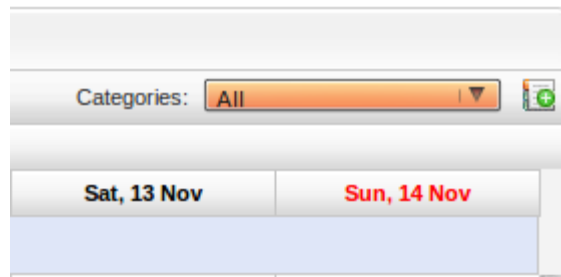


### 3.3.1 Add a new category

This function is used to create new categories in Calendar.

✓ **To create a new category:**

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



The **Event categories** form will appear:

A screenshot of the 'Event categories' form. The form has a title bar with a close button (X). Inside, there is 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, there is a form to add a new category. It includes a text input field labeled 'Event category' with an asterisk (\*) indicating it is required, and a larger text area labeled 'Description'. At the bottom of the form are three buttons: 'Save', 'Reset', and 'Close'.

Illustration 17: The Event categories form

**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

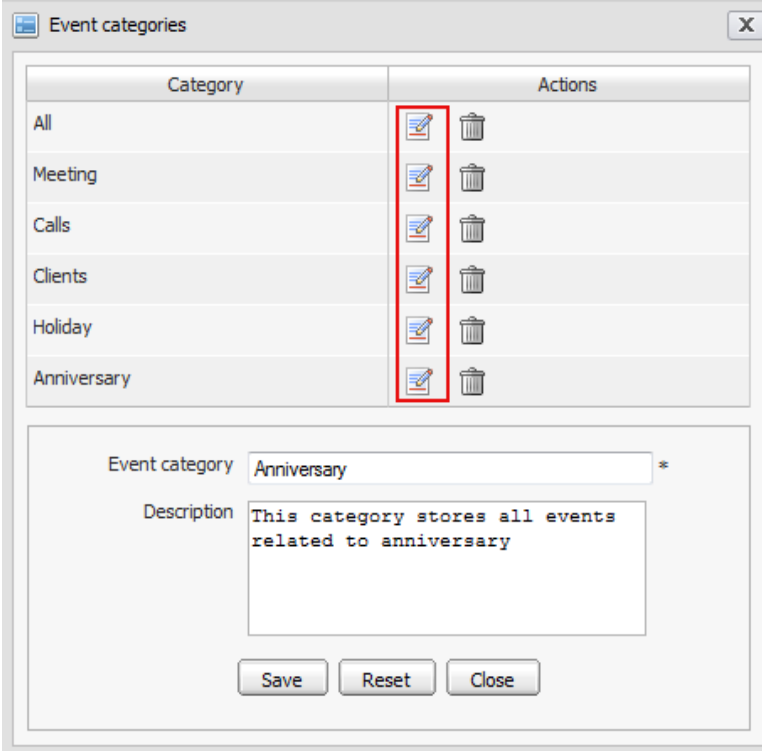
This function allows changing name and description of a selected category.













- ✓ **To edit/delete a category:**

**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.



Category	Actions
All	 
Meeting	 
Calls	 
Clients	 
Holiday	 
Anniversary	 

Event category

Description 

This category stores all events related to anniversary

Illustration 18: The Edit category form

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


## 3.4 Manage Calendars

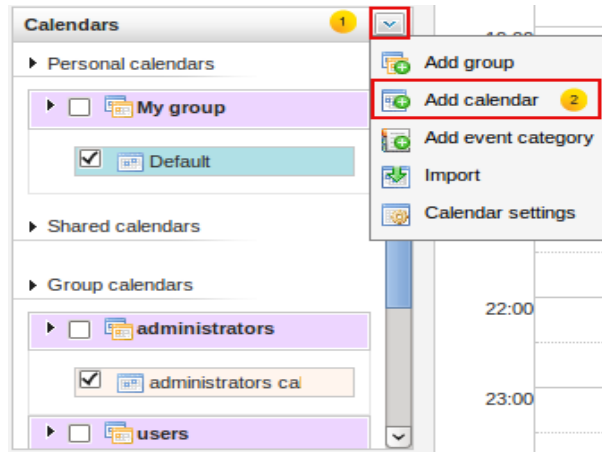
After being created, a calendar will be categorized in the group of your choice. It can be added tasks/events, edited, deleted, exported and shared with the other users. There are three types of calendar: personal calendars, shared calendars and group calendars.

### 3.4.1 Add a new calendar

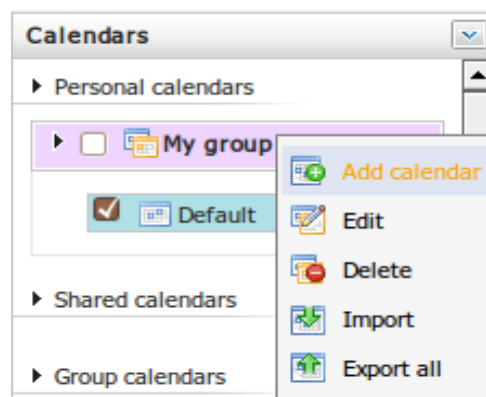
This function allows adding new calendars. You may select if a personal calendar or a shared calendar is created. You can also decide the specific user or group that can view and edit that shared calendar.

- ✓ **To create a new personal calendar:**

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




**The 2<sup>nd</sup> way:** Right-click a calendar group which exists in the list of **Personal Calendars** and then click **Add calendar** in the drop-down menu. By this way, you already selected the group for new calendar.



After following one of these methods, the **Calendar** form will appear:

Details:

■ The **Calendar details** tab:

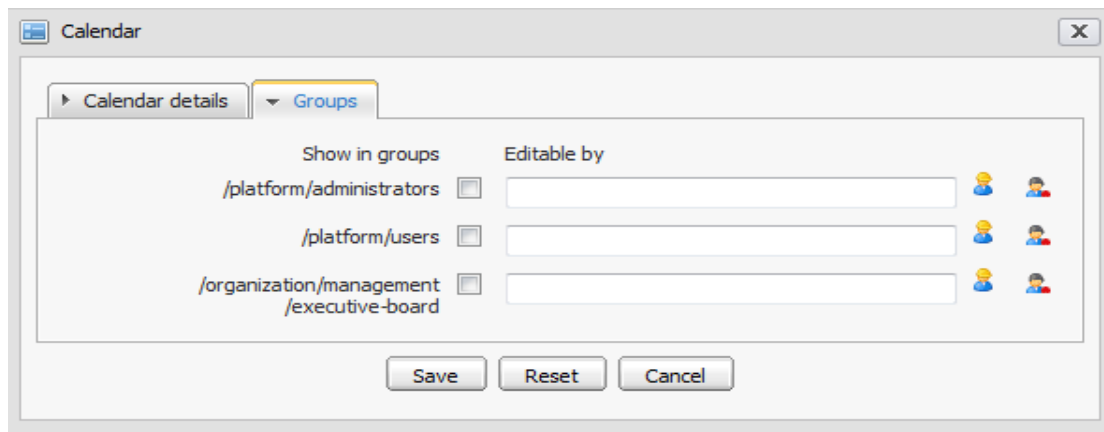





<b>Display name</b>	The name of the calendar. This field is required
<b>Description</b>	The brief description of the calendar
<b>Groups</b>	The group contains your calendar. You can select existing group or add a new group by clicking the  icon. The <b>Calendar group</b> form that allows adding a new 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.

**Step 3:** Define the details for new calendar then click **Save** to finish.

✓ **To create a shared calendar:**

Follow one of these methods stated above to open the **Calendar** form. After that, go to the **Groups** tab.

### ■ The **Groups** tab:


Show in groups	Editable by
/platform/administrators <input type="checkbox"/>	<input type="text"/>  
/platform/users <input type="checkbox"/>	<input type="text"/>  
/organization/management /executive-board <input type="checkbox"/>	<input type="text"/>  

Save Reset Cancel

You can choose who and what groups can view and edit the shared calendar.

To share a calendar, tick the checkboxes corresponding to a groups that you want to share. These users will be able to view this calendar. You can also decide specific user and group to edit the calendar in each group.

### ✓ To grant the edit permission to individual user in a group:

1. In the **Calendar** form, go to **Groups** tab.
2. Click . The User selector form will appear. This form will help you select a specific user you want to share.

platform > administrators

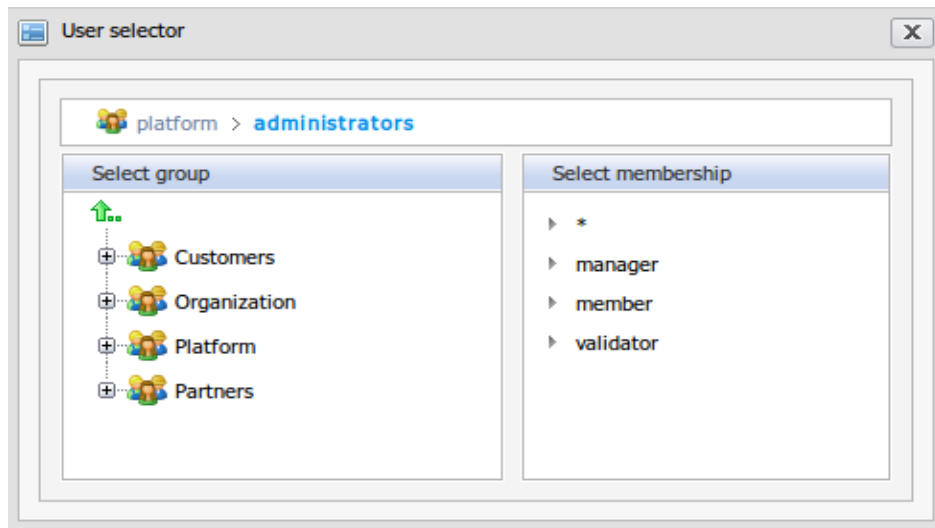
Select group	Select user
<ul style="list-style-type: none"> <li>Customers</li> <li>Organization</li> <li>Platform</li> <li>Partners</li> </ul>	<ul style="list-style-type: none"> <li>john</li> <li>root</li> </ul>

3. Select the group to which the user you want to share belongs.
4. Select a user in that group in the left pane.

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

1. In the **Calendar** from, go to **Groups** tab.

2. Click the  icon.



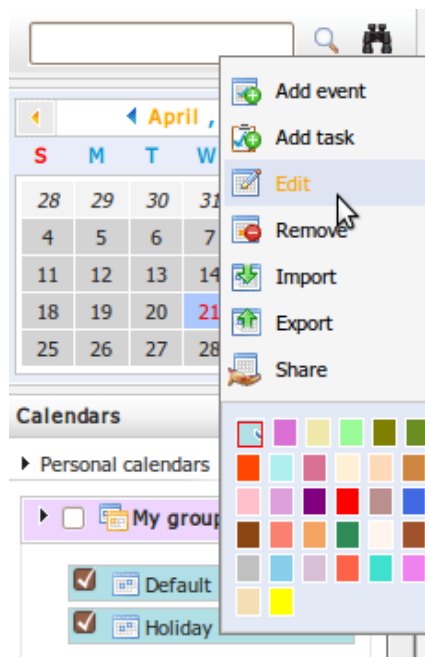
3. Select a group in the left pane, then select a membership type of that group.

The new added calendar will appear in the calendar list.

### 3.4.2 Edit a calendar

- ✓ To edit a calendar, do as follows:

**Step 1:** Right-click the name of the calendar (for example Holiday) to open the drop-down menu and click **Edit**:



The **Calendar** form will appear. If you are editing a personal calendar, this form will contain the Calendar Details tab only.

**Step 2:** Make changes on the calendar, then click **Save** to complete.



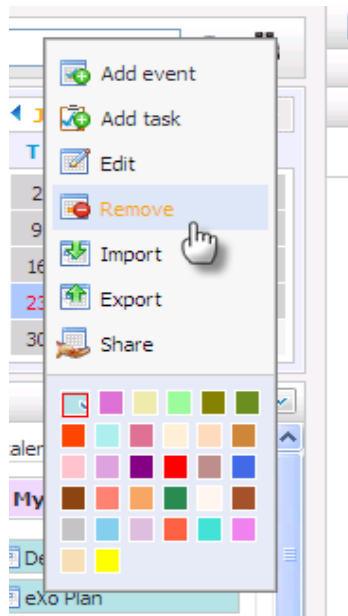
*You can edit a shared or group calendar only when you have the edit permission.*

### 3.4.3 Remove a calendar

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

✓ **To remove a calendar:**

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



**Step 2:** Click **OK** in the confirmation message that appears.



*If you do not have the edit permission on the shared calendar, removing a shared calendar means you only remove it from your calendar 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:

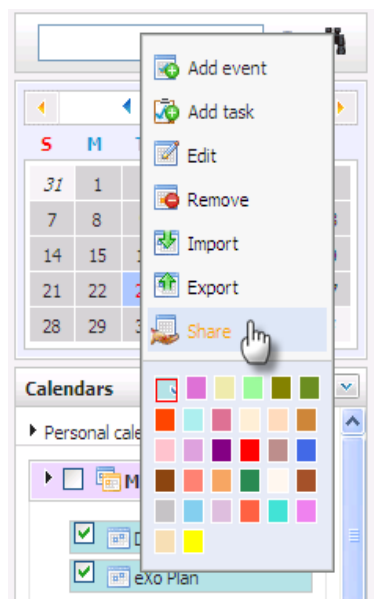
- **View permission:** allows you (shared user) to view a calendar and its events/tasks, but you cannot change any information. It means that you cannot add/edit/delete events/tasks;



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:**

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



The **Share calendar** form will appear:

User name	Can edit	Actions
Empty data		

Calendar name: Default

User name:

Edit permission: ☐

Save Cancel

Illustration 19: The Share calendar form


#### Details:

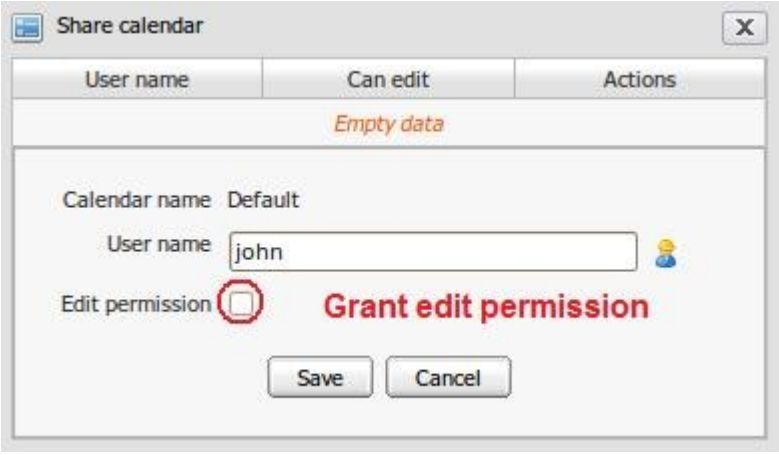
<b>Calendar name</b>	The name of the calendar that you choose to share
----------------------	---

User name	The name of the users who you want to share your calendar with
Edit permission	This option allows granting edit permission on the calendar to selected user

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

**To select users for sharing:**

1. Click  at the right of the **User name** field.
2. Select users that you want to share.

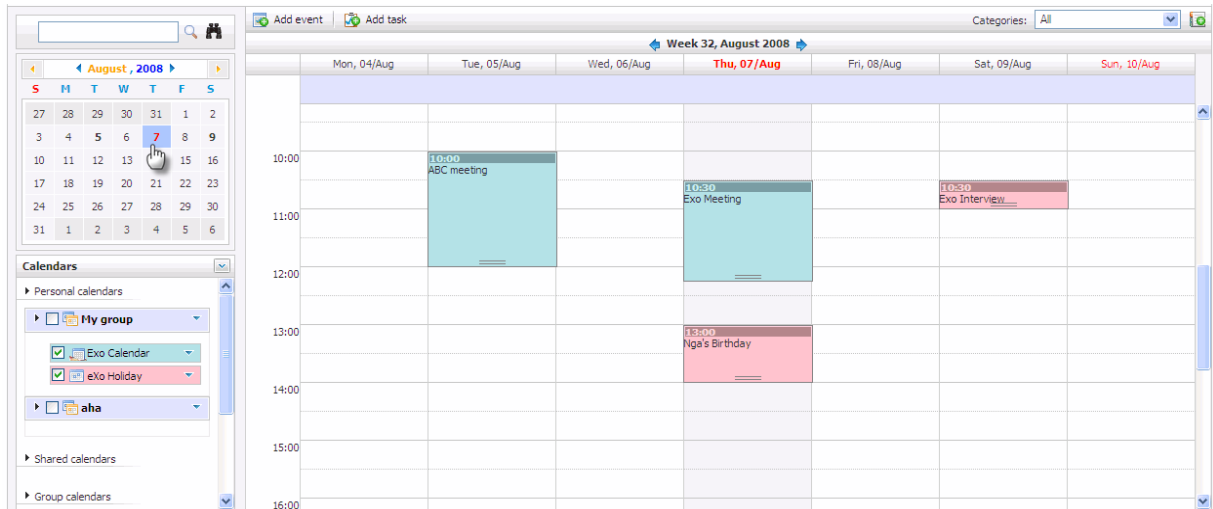


The image shows a 'Share calendar' dialog box. It has a title bar with a close button (X). Inside, there's a table with columns 'User name', 'Can edit', and 'Actions'. The table is currently empty, showing 'Empty data'. Below the table, there's a section for 'Calendar name' (Default) and 'User name' (john). To the right of the 'User name' field is a user icon. Below this, there's an 'Edit permission' checkbox, which is currently unchecked and circled in red. To the right of the checkbox is the text 'Grant edit permission' in red. At the bottom, there are 'Save' and 'Cancel' buttons.

**Step 3:** Click **Save** to complete.

### 3.4.5 Change the calendar color

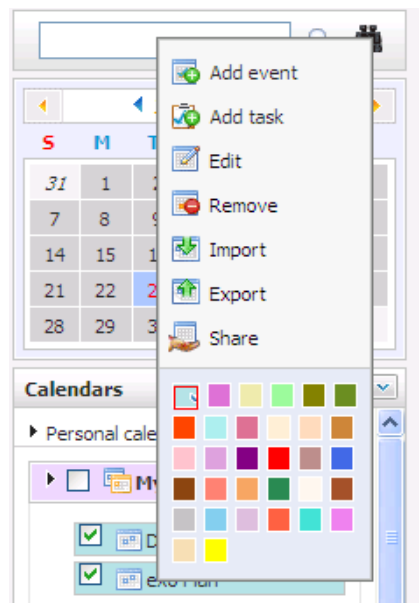
When you have many calendars display on the screen, it will be hard to recognize what calendar is for what activities. If you have to work with a few calendars, it's helpful to assign colors to distinguish your calendars from one another.



**Illustration 20: The Calendar view pane with different events/tasks on different calendars**

✓ **To change calendar color:**

**Step 1:** Right-click the calendar name 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.

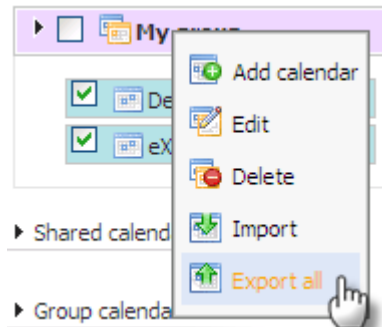
### 3.4.6 Export calendars

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.

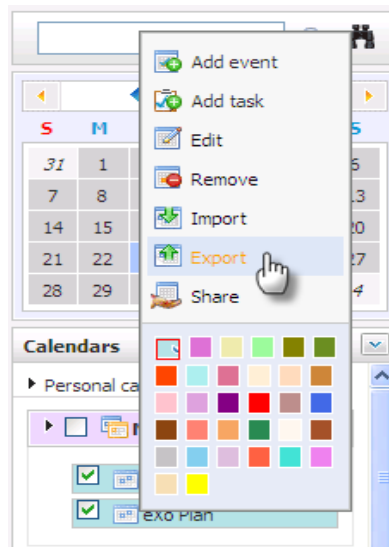
✓ To export calendars:

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

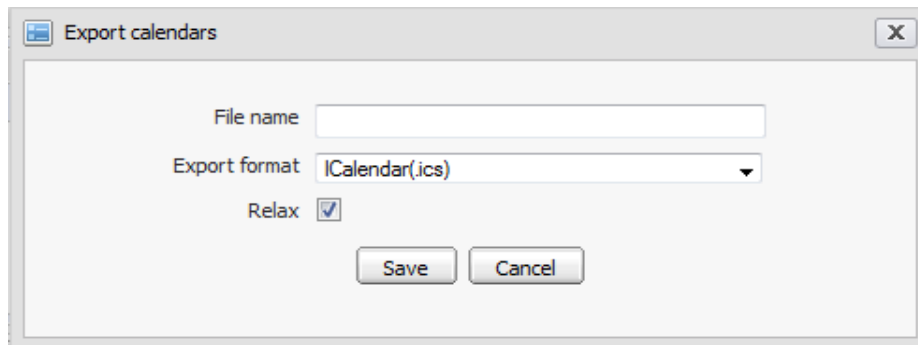
**The 1<sup>st</sup> way:** Right-click the appropriate calendar group to open the drop-down menu, then select **Export all** in the pop-up menu:



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



The **Export calendars** form will appear:



**Illustration 21: The Export calendars form**

**Step 2:** Enter the file name and select an export format from the list.

**Step 4:** Select the calendar you want to export by ticking its checkbox.

**Step 5:** Click **Save** to complete.




*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.*

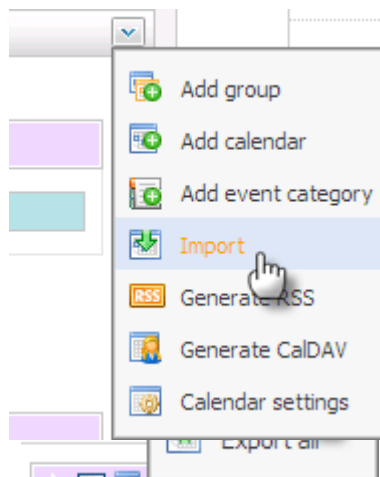
### 3.4.7 Import calendars

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

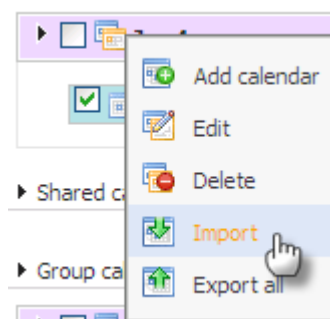
✓ **To import calendar:**

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

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



**The 2<sup>nd</sup> way:** Right-click 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 the specific calendar in the calendar list and select the **Import** item in the pop-up menu.

The **Calendar** form will appear:



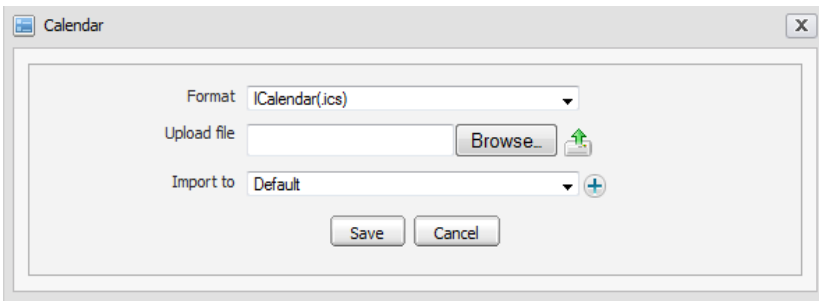

 A screenshot of a web form titled 'Calendar'. The form contains the following fields and controls:
 

- Format:** A dropdown menu currently set to 'ICalendar(.ics)'.
- Upload file:** A text input field followed by a 'Browse...' button and a green upload icon.
- Calendar name:** A text input field with a required field asterisk and a help icon.
- Description:** A large text area.
- Groups:** A dropdown menu currently set to 'My group'.
- Country (Language):** A dropdown menu currently set to 'Belgium(French)'.
- Time zone:** A dropdown menu currently set to '(GMT +01:00) Europe/Brussels'.
- Color:** A color selection bar.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

**Illustration 22: The Import calendars form**


Details:

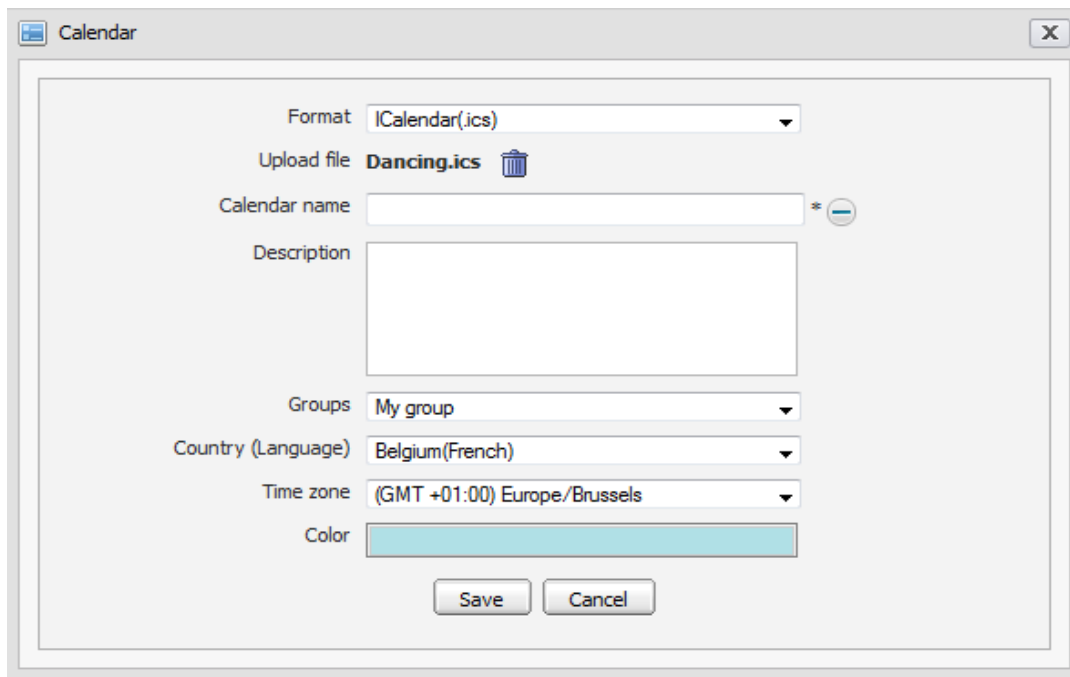
<b>Format</b>	The format of the imported file. There are 2 options: *.ics and *.csv
<b>Upload file</b>	The path of the upload file
<b>Browse button</b>	To select the uploaded file from your local computer

	To start uploading the selected file.
<b>Calendar name:</b>	The display name of the imported calendar.
	<p>This icon is used to unhide a form used to import an uploaded file to existed calendar:</p>  <p>You can click  icon to import the uploaded file to new calendar.</p>
<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 the

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



**Step 4:** Enter the details for the imported calendar.

**Step 5:** Click **Save** to complete.



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



### 3.4.8 iCal

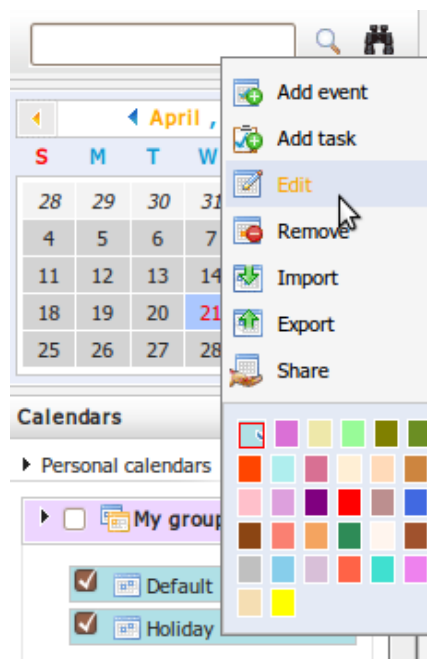
iCal provides a link that allows others to download a file containing all events and tasks in a calendar.

**Public URL:** Public Url link allows you to share your calendar with other users. They don't need to have Calendar accounts to download the file, but they must use a calendar application which supports the .ics to open and view it. They can import your calendar into their calendar. By default, Public Url is empty and it is only accessible when public access is explicitly enabled.

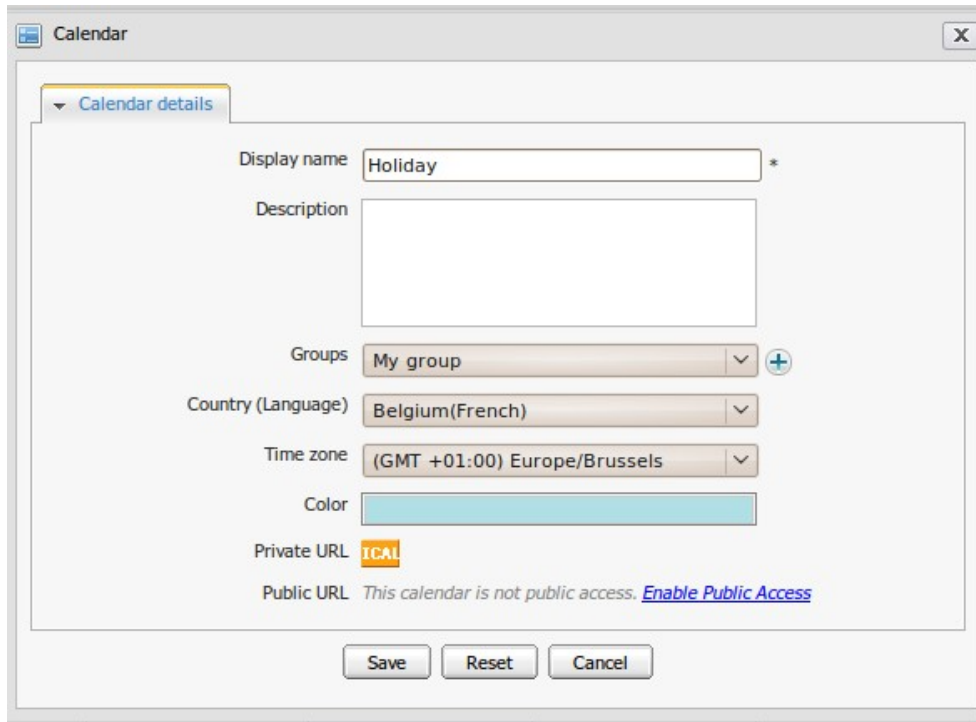
**Private URL:** iCal is used for personal usages. It means that you, the creator of the calendar, can download it to your computer and use any calendar applications which support .ics format to open it. You can also import it into another calendar.

✓ **To access iCal support:**

**Step 1:** Right-click a calendar that you want to access iCal, then click **Edit** in the drop-down menu:



The **Calendar** form will appear:



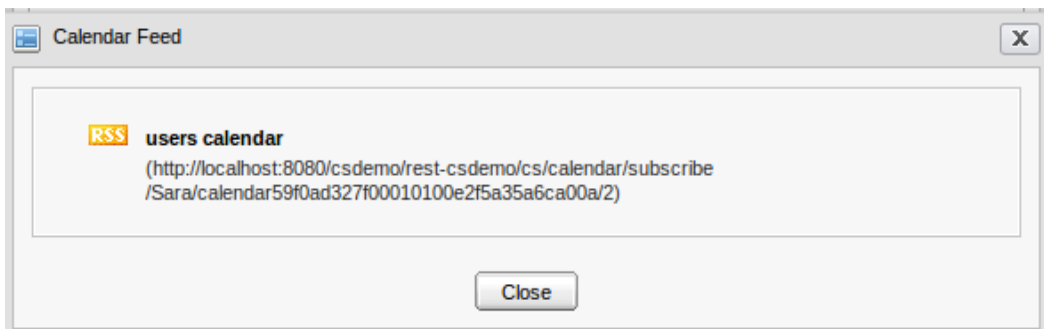
The 'Calendar' dialog box is shown with the 'Calendar details' tab selected. It contains the following fields and options:

- Display name:** A text field containing 'Holiday' with an asterisk indicating it is required.
- Description:** A large empty text area.
- Groups:** A dropdown menu showing 'My group' with a plus icon to add more groups.
- Country (Language):** A dropdown menu showing 'Belgium(French)'.
- Time zone:** A dropdown menu showing '(GMT +01:00) Europe/Brussels'.
- Color:** A color selection bar currently showing a light blue color.
- Private URL:** A button labeled 'ICAL'.
- Public URL:** Text indicating 'This calendar is not public access.' with a link to 'Enable Public Access'.

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

**Step 2:** Get the Public URL or Private URL. For Public URL, you must Enable Public Access first.

A **Calendar Feed** form will pop up:



The 'Calendar Feed' dialog box displays an RSS feed link for the user's calendar. It includes an RSS icon, the text 'users calendar', and the full URL: `(http://localhost:8080/csdemo/rest-csdemo/cs/calendar/subscribe/Sara/calendar59f0ad327f00010100e2f5a35a6ca00a/2)`. A 'Close' button is located at the bottom.

You can use the link provided in this pop-up to send to other users.

## 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 resource usage, such as a conference room, or presentation.

### 3.5.1 Add a new event

There are 2 ways to add a new event:

- **Quick add event:** allows you to create the most basic event details.
- **Add detailed event:** allows you to create event with advanced details.

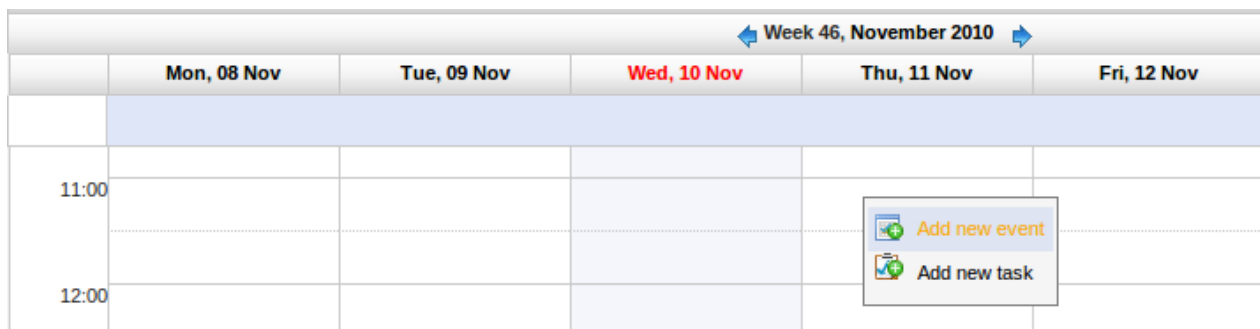
#### 3.5.1.1 Quick add event

- ✓ To quick add a new event, you can follow any of these ways:

**The 1<sup>st</sup> way:** Click the  **Event** button on the toolbar.



**The 2<sup>nd</sup> way:** Right-click the calendar view pane and select **Add new event** in the pop-up menu:



**The 3<sup>rd</sup> way:** Right-click the calendar you would like to add new event and select **Add Event** in the pop-up menu.

**The 4<sup>th</sup> way:** Click the appropriate time slot in the calendar view pane. Drag your cursor to alter the length of the event. You can read [Drag and drop an event](#) for more information.

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

Illustration 23: The Quick add event window

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 time of the event.
<b>To</b>	The end time of the event.
<b>All day</b>	If the event doesn't have a specific time, select <b>All Day</b> option. 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 in the date, starting time, end time, location, and description of your event. If you're using multiple calendars, you can also select which calendar this event should be on.

**Step 3:** Click **Save** to complete.

### 3.5.1.2 Add detailed event

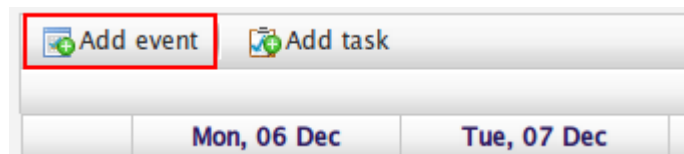
With a detailed event, you can:

- Save time by creating repeating events rather than entering each instance separately.
- Create a reminder for upcoming event with your own desired notification settings
- Invoke people to event
- View the availability time of the participants

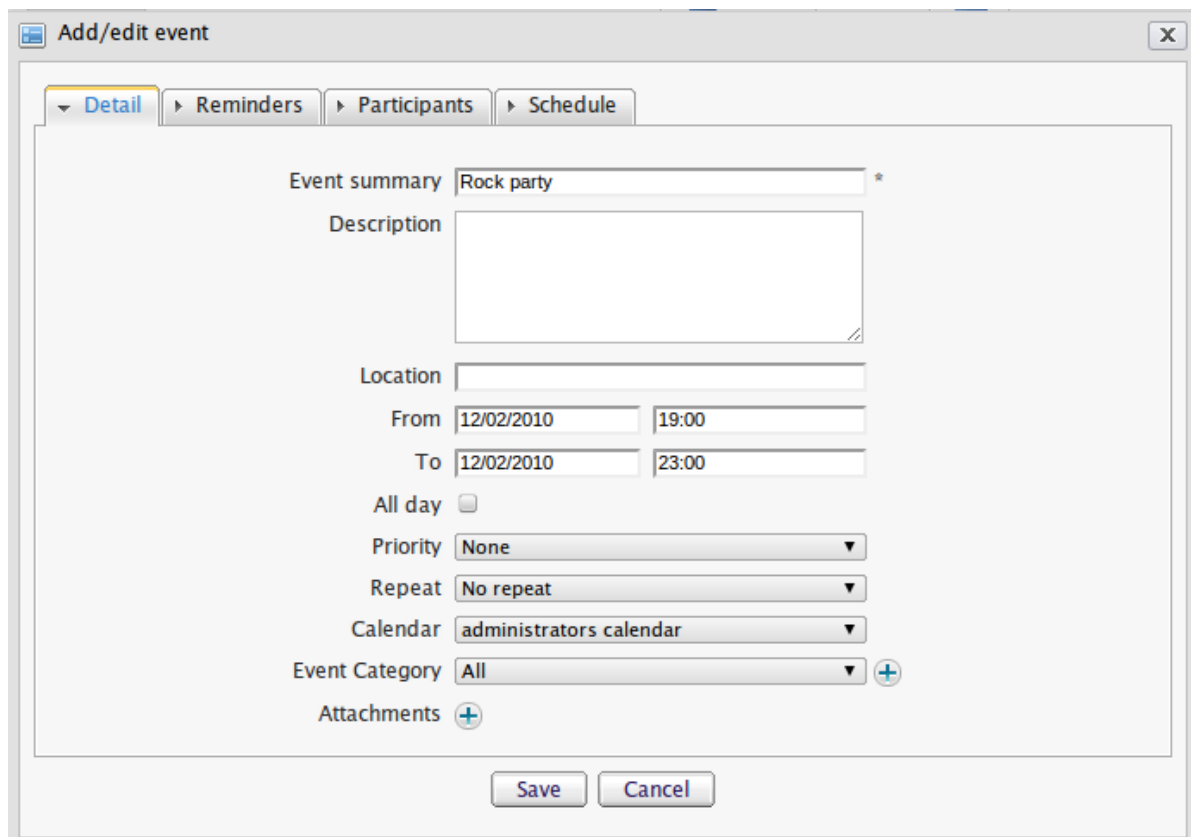
✓ **To add a detailed event:**

**The 1<sup>st</sup> way:** Click  in the **Quick add event** window.

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



The **Add/edit event** window will appear:

A screenshot of the 'Add/edit event' window. The window has a title bar with a close button. 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:** A date and time input field showing '12/02/2010' and '19:00'.
- To:** A date and time input field showing '12/02/2010' and '23:00'.
- All day:** A checkbox that is currently unchecked.
- 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 window are 'Save' and 'Cancel' buttons.

- The **Detail** tab gives you additional details of an event compared with Quick add event:


<b>Location</b>	The location where the event will take place.
<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 meeting, monthly report.
<b>Attachments</b>	The attached files to be included with the event, such as map, invitation card.

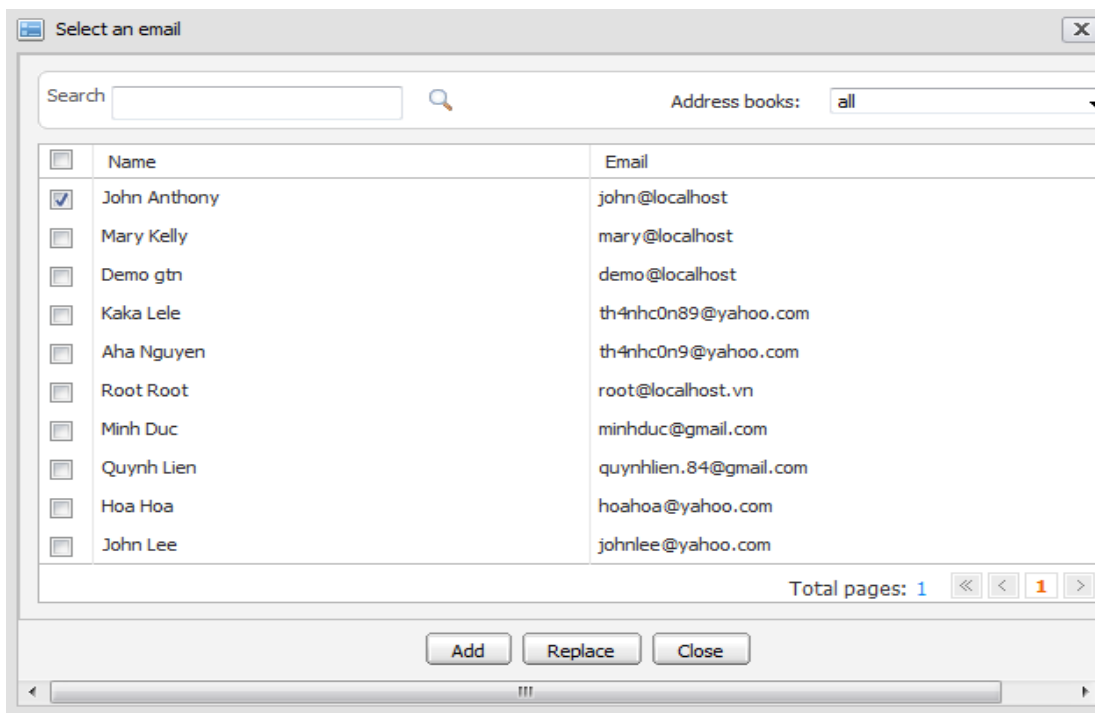
- The **Reminders** tab:

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.

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>	This checkbox 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 that the pop up reminder will be repeated before the event starts.
<b>Repeat</b>	The checkbox allows setting the event's pop up reminder repeat or not.

To add more emails, in the **Select email** form, click the plus  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 24: The Select an email form**

Email addresses of your contact will be listed and can be selected by checking the corresponding checkboxes.

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

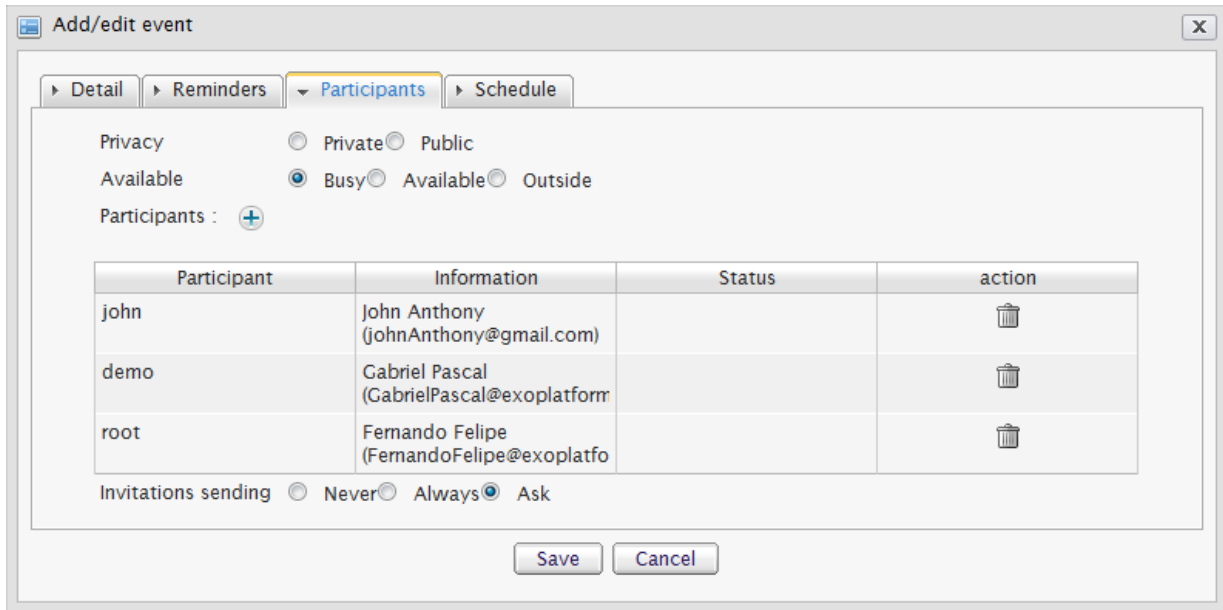
Click the **Add** button to add the selected emails to the **Also send reminders to** fields or click the **Replace** button to replace existing emails by the selected emails.



*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.*

- The **Participants** tab: In this tab, you can select other users to join in your event.







**Add/edit event**

Detail Reminders **Participants** Schedule

Privacy ☐ Private ☐ Public

Available ☒ Busy ☐ Available ☐ Outside

Participants : 


Participant	Information	Status	action
john	John Anthony (JohnAnthony@gmail.com)		
demo	Gabriel Pascal (GabrielPascal@exoplatform)		
root	Fernando Felipe (FernandoFelipe@exoplatform)		

Invitations sending ☐ Never ☒ Always ☐ Ask

Save Cancel

Illustration 25: 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  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> </ul>

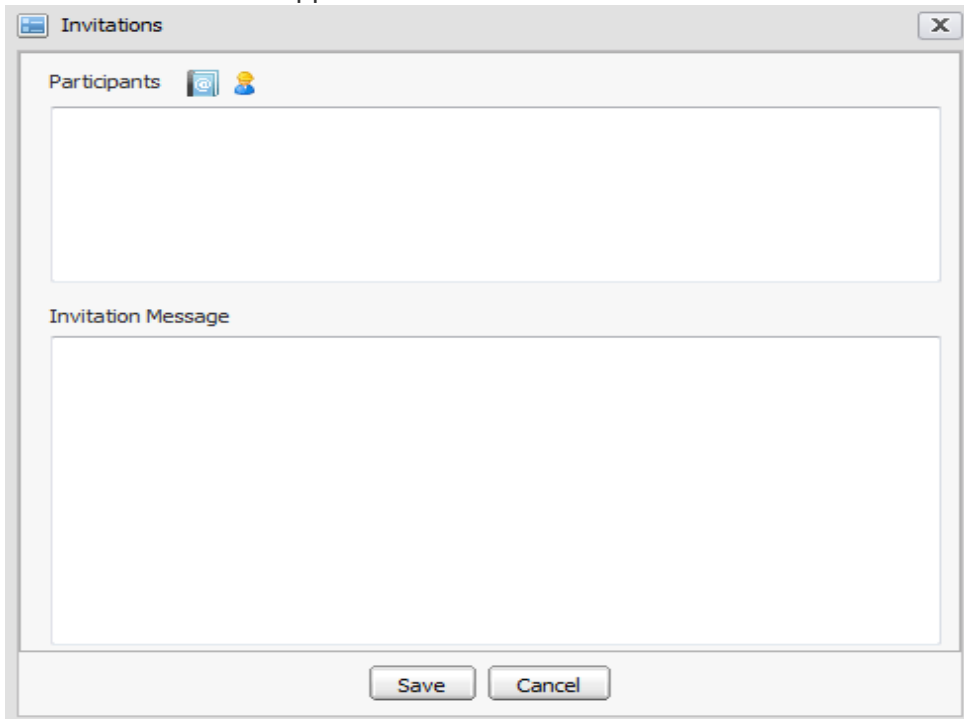


- ✓ **Always:** The event invitation will always be sent to the participants.
- ✓ **Asked:** There will be a confirmation message which confirms that whether you want to send the invitation or not.


✓ **To select users to participates in invite box:**

**Step 1:** Click the plus icon  .

The **Invitations** form will appear:



**Illustration 26: The Invitations form**

**Step 2:** Select contacts from your Address book by clicking  .

<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

Total pages: 1

Add Close

**Illustration 27: The Select Address form`**

To select participants, select the checkboxes corresponding to users that you want to invite. To search for 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.

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

<input type="checkbox"/>	User Name	First Name	Last Name	Email
<input type="checkbox"/>	demo	Gabriel	Pascal	GabrielPascal@exoplatform
<input type="checkbox"/>	john	John	Anthony	johnAnthony@gmail.com
<input type="checkbox"/>	mary	Mary	Kelly	mary@localhost
<input type="checkbox"/>	root	Fernando	Felipe	FernandoFelipe@exoplatform

Add Close

**Illustration 28: The Select users form**

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

**Step 3:** Enter the invitation message then click the **Add** button to add selected contact emails

■ The **Schedule** tab:

The screenshot shows the 'Add/edit event' window with the 'Schedule' tab selected. At the top, there are tabs for 'Detail', 'Reminders', 'Participants', and 'Schedule'. Below the tabs, there is a date picker set to 'Feb, 24, 2010', a time range from '00' to '23', and an 'All day' checkbox. A list of participants is shown on the left, with 'john' and 'root' listed. A legend at the bottom right indicates 'Available' (white) and 'Busy' (red). Buttons for 'Save' and 'Cancel' are at the bottom.

**Illustration 29: The Schedule tab of the Add/Edit events form**


In this tab, you can 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 participants.

✓ **To add participants:**

Click the **Add attendee** icon  on the left pane.

The Select users form appears that allows you to select the attendees.

✓ **To delete participants:**

**Step 1:** Select the participant's name that you want to delete by ticking the User checkbox and then click the **Remove attendee** icon  on the left pane.

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

✓ **To apply selected date:**

**Step 1:** Add users to participants list.

**Step 2:** Tick the **Apply selected date** checkbox. This will apply the selected date From/To in the left pane.

Availability time of users are shown as below:

The 'Add/edit event' dialog box has four tabs: Detail, Reminders, Participants, and Schedule. The 'Schedule' tab is active. It features a date picker set to 'Feb, 23, 2010' and a time range from 00 to 23. A legend indicates that green represents 'Available' and red represents 'Busy'. The 'Participants' list includes 'john' and 'root'. The 'Save' and 'Cancel' buttons are at the bottom.

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

You can complete adding a new event by clicking **Save**. The confirmation message will appear:

The 'Confirm' dialog box displays the message: "The event will be saved and invitations sent. Do you confirm?". It has two buttons: 'Save and Send' and 'Save'.

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.

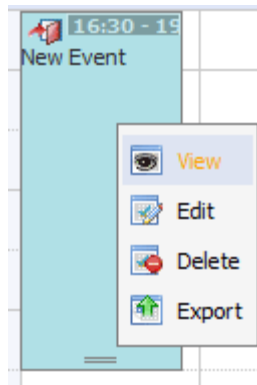
You will see the event updated in your Activity Stream of your Space or Group Space.

The 'Activity Stream of Jack' shows an event update by Jack: "The following event has been updated: Rock Party". A 'More info' link is provided. The event details are: 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. The post is timestamped 'less than a minute ago' and includes 'Comment' and 'Like' links. At the bottom right are 'Refuse' and 'Accept' buttons.

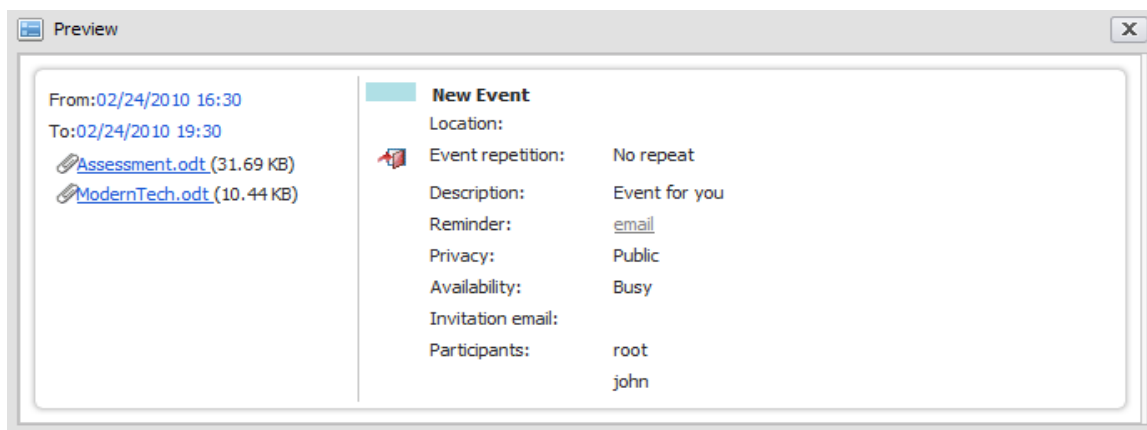
The event will be updated in your Activity Stream the brief information about the event like description, location, start time and end time. You can even refuse or accept participating in this event directly in Activity Stream without going to Calendar application.

### 3.5.2 View event details

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



The **Preview** form will appear:



<b>From:</b> 02/24/2010 16:30	
<b>To:</b> 02/24/2010 19:30	
<a href="#">Assessment.odt</a> (31.69 KB)	
<a href="#">ModernTech.odt</a> (10.44 KB)	
<b>New Event</b>	
Location:	
Event repetition:	No repeat
Description:	Event for you
Reminder:	<a href="#">email</a>
Privacy:	Public
Availability:	Busy
Invitation email:	
Participants:	root john

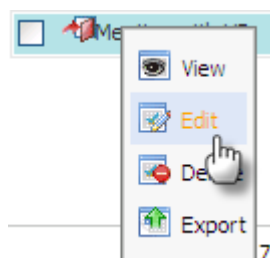
Illustration 30: The Preview event form

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

- ✓ To edit an event:

**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 pop-up menu:



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

**Step 2:** Edit information of the selected event.

**Step 3:** Click **Save** to complete.



- When editing you can add/ remove the attachment files or download them by directly clicking 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 the Calendar view pane.
- You can only edit events in personal, shared and group calendars which you have edit permission.

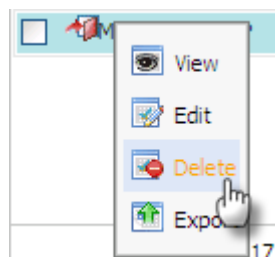
### 3.5.4 Delete an event

This function allows removing events from a calendar.


✓ **To delete an event:**

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

**Step 2:** Click **OK** in the confirmation message.



In the month view, you must tick the checkboxes before the event you want to delete, then click

 **Delete checked** on the action bar:

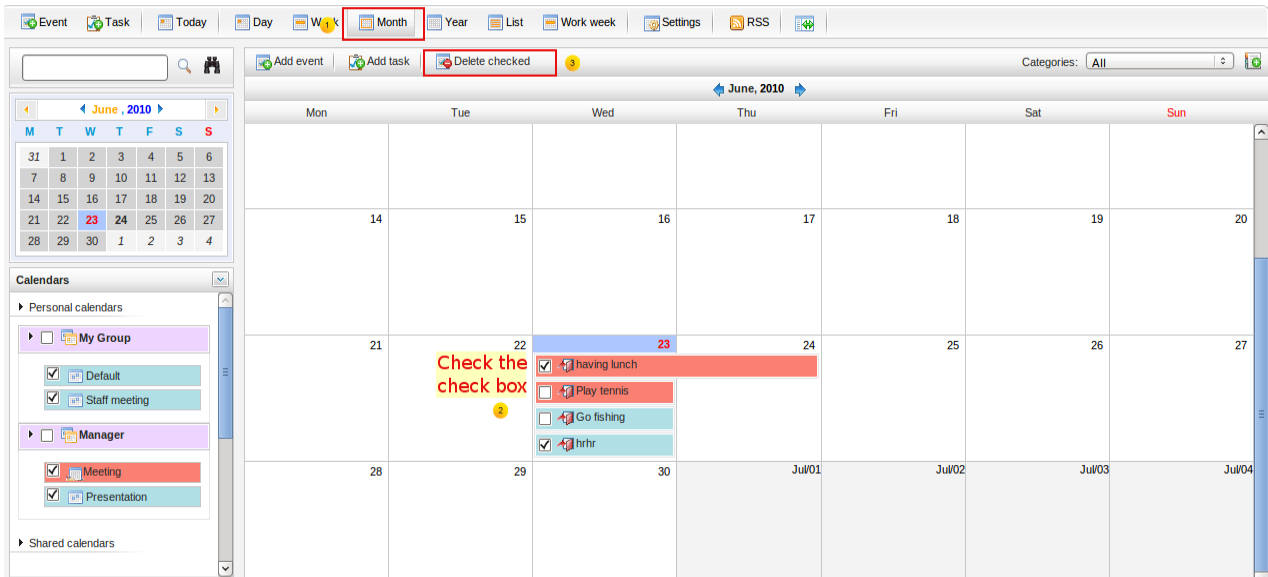


Illustration 31: The Month View of the Calendar pane

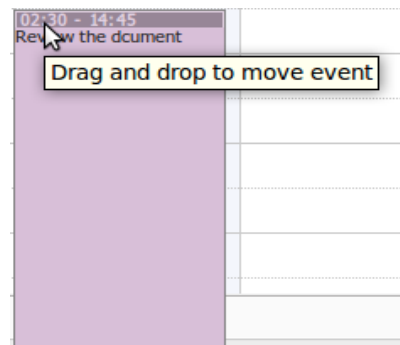
**Step 2:** The confirmation message will appear, click **OK** to accept deleting the selected event.



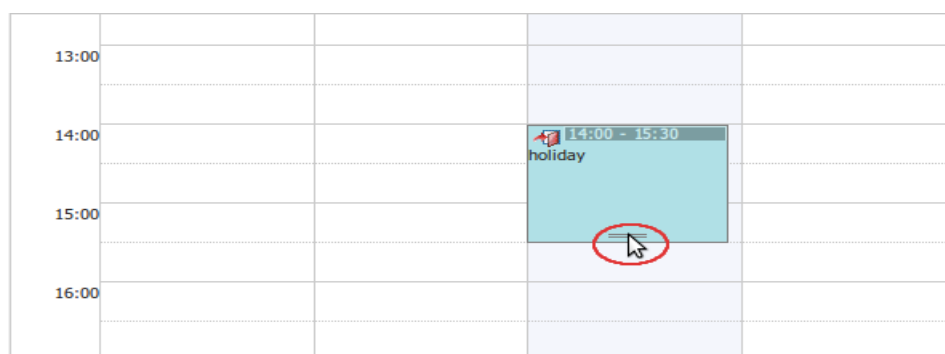
*You can only delete events in the personal calendar or shared and group calendars which you have edit permission.*

### 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 the event, drag it and drop it on another new day, new time area in the Calendar view pane.



You also can drag your cursor to alter the length of the event.



- According to the features of the Calendar pane 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 their checkboxes 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.*

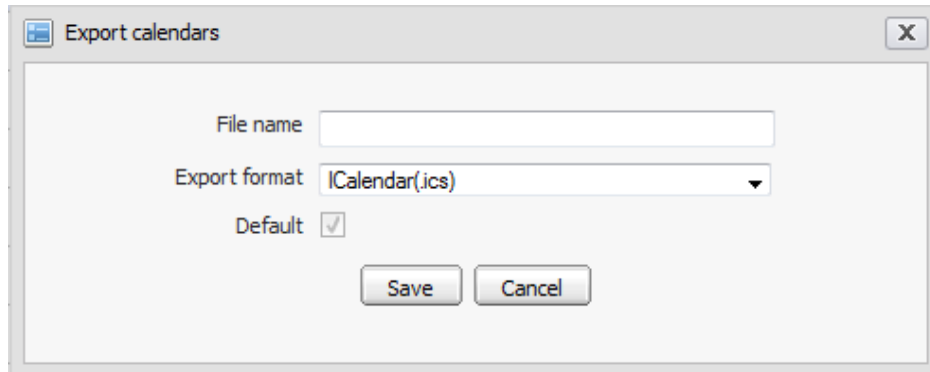
### 3.5.6 Export an event

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

- ✓ **To export an event:**



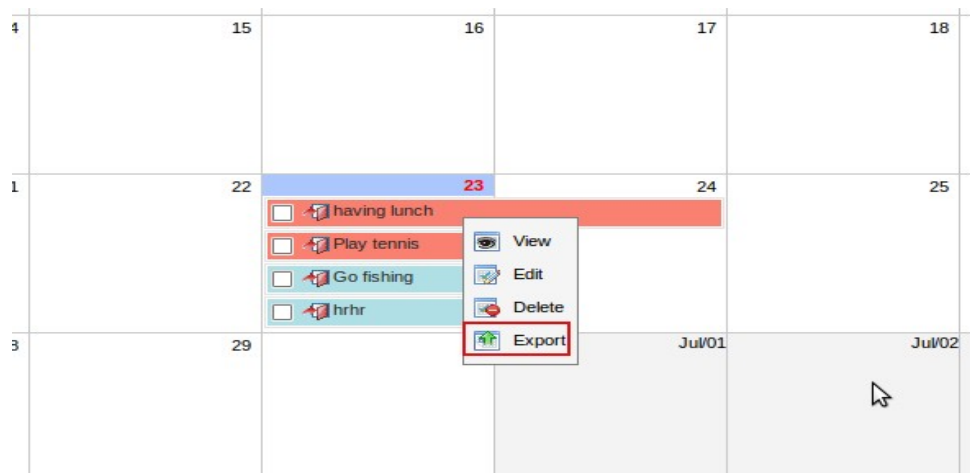
**Step 1:** Right-click the event that you want to export and select **Export** in the pop-up menu:  
The Export calendars form will appear:



**Step 2:** Enter a file name and select the export format

**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 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

You can import an event into a specific calendar. The process to import an event is similar with import a calendar. You can see 3.4.7 Import Calendar for more details.

## 3.6 Manage Tasks

Just like events, tasks also appear on your calendar, but you can not 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. You have 2 ways to add a new event:

- **Quick add task:** allows you to create the most basic event details.
- **Add detailed task:** allows you to create event with advanced details.

## 3.6.1 Add new task

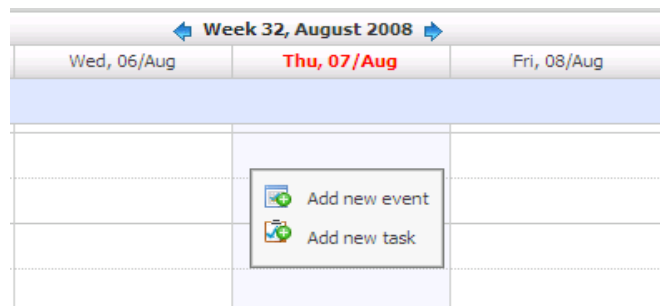
### 3.6.1.1 Quick add task

- ✓ To add a quick task:

**The 1<sup>st</sup> way:** Click the **Task** icon on the toolbar



**The 2<sup>nd</sup> way:** Click the calendar view pane and click **Add new task** in the drop-down menu.



**The 3<sup>rd</sup> way:** Right clicking on the calendar name and select **Add Task** item in the pop-up menu.

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

**Quick add task**

Task: Clean room \*

Note:

From: 12/02/2010 19:00

To: 12/02/2010 20:00

All day: ☐

Calendar: users calendar ▼

Task category: All ▼

Buttons: Save, More details, Cancel

Illustration 32: The Quick add task form

Details:

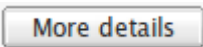
<b>Task</b>	The name of the task.
<b>Note</b>	The note of the task.
<b>From</b>	The starting date/time of the task.
<b>To</b>	The ending date/time of the task.
<b>All day</b>	<b>All day</b> option allows setting the duration of the task to be all day or not. If you don't check this option, you have to 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

### 3.6.1.2 Add detailed task

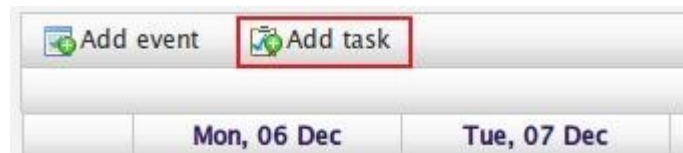
With a detailed task, you can:

- Save time by creating repeating events rather than entering each instance separately.
- Create a reminder for upcoming task with your own desired notification settings.
- Attach file needed for a task.

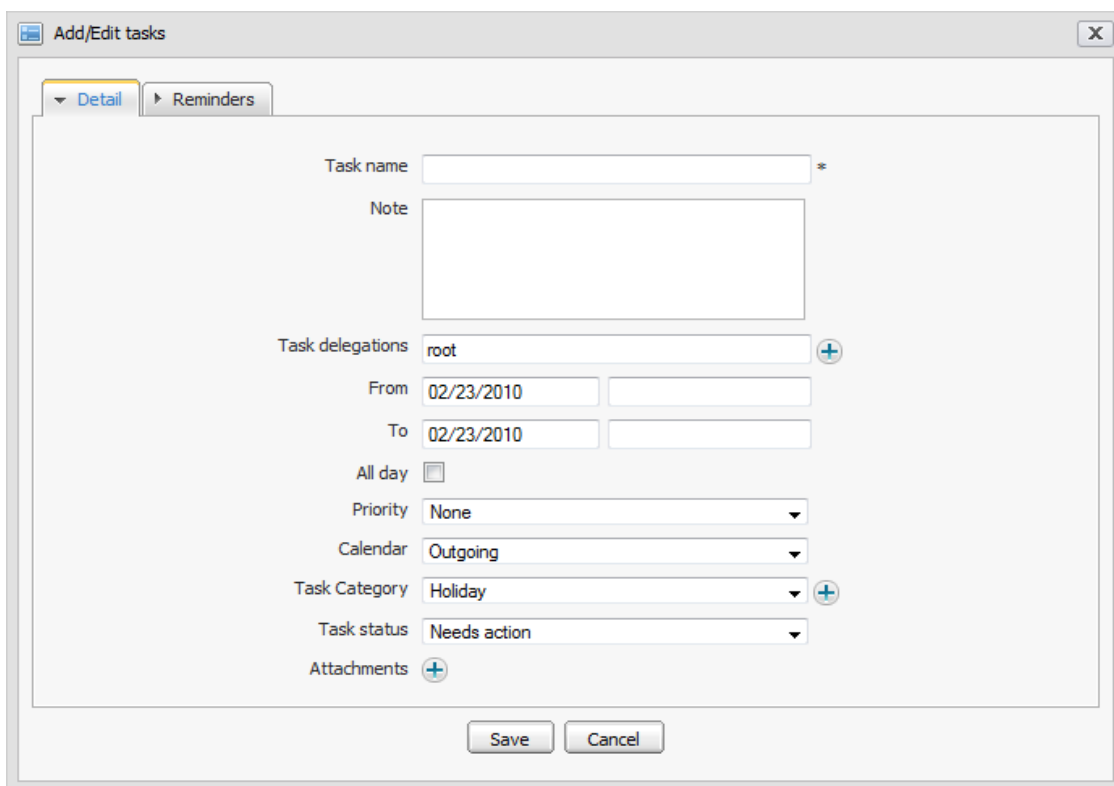
✓ To add detailed task:

The 1<sup>st</sup> way: Click the  button in the **Quick add task** form.

The 2<sup>nd</sup> way: Click the  button.






After following one of these ways, the **Add/Edit tasks** form will be shown:



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

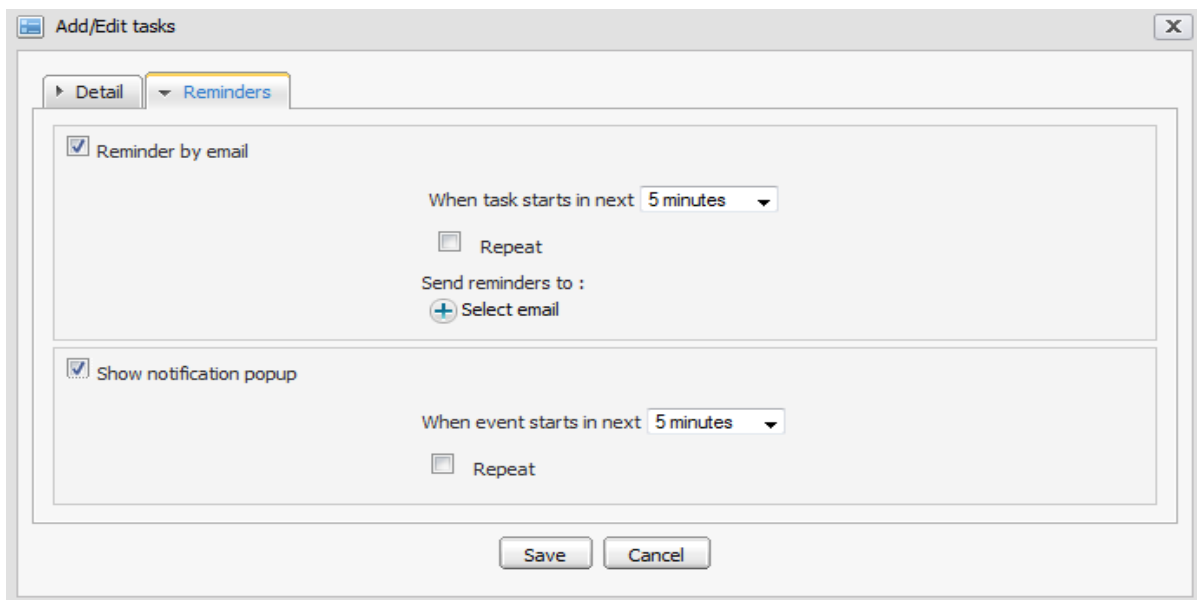
Details:

<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>Priority</b>	The priority level of the task.
<b>Calendar</b>	The calendar of the task.


<b>Task Category</b>	The category of the task. You can add a new one by clicking  button
<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 file to be included with the task. To attach file, click  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.

#### The Reminder by mail:



Details:

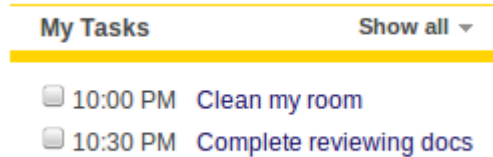
<b>When task starts in next</b>	The interval time that the reminder will be repeated and a mail reminder is sent before the task starts
<b>Repeat</b>	This option allows setting the reminder to repeat in amount of time
<b>Send reminders to</b>	The list of email addresses to get the mail reminder. You can click  icon to select contact emails from your Address book

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

**Step 3:** Click **Save** to finish.

**eXo Collaboration and Space:**

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




You can tick the checkboxes to complete the corresponding tasks quickly without going to the Calendar application. Click **OK** in the confirmation message to complete your selected task.

✓ **To configure the My Tasks gadget:**

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



Click . 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"/>	

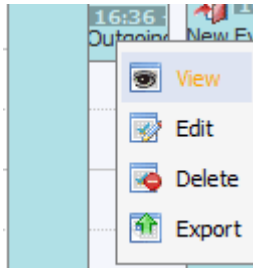
<b>Base url</b>	The url that points to Calendar application
<b>Subscription url</b>	The url that points to service from which you will get data from
<b>Date time format</b>	The time format: AM/PM or 24h
<b>Calendar</b>	The calendar from which this gadget will get your tasks data



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 the task in the Calendar View Pane and select View in the pop-up menu:



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

A screenshot of a 'Preview' window. On the left, there is a link to an attachment: 'ModernTech.odt (10.44 KB)'. On the right, under the heading 'Outgoing activities', there is a table of task details.

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

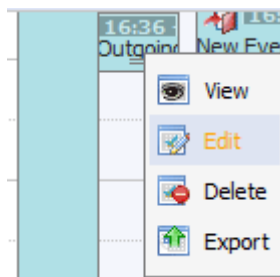
At the **Preview** form, if the task includes attachments, you can view the attachment by clicking on the title of the attachment, a pop up will be displayed, available for saving the attachment file into your local disk.

### 3.6.3 Edit task details

This function allows making changes to existing tasks.

✓ **To edit a task:**

**Step 1:** Right-click the task you want to edit and select **Edit** in the pop-up menu.



The **Add/Edit tasks** form will be displayed:

**Add/Edit tasks**

Task name: Outgoing activities \*

Note: Outgoing far from Hanoi

Task delegations: +

From: 02/23/2010 09:00

To: 02/23/2010 22:00

All day: ☐

Priority: None

Calendar: Relax

Task Category: All +

Task status: Needs action

Attachments: ModernTech.odt-(10.44 KB) Remove +

Save Cancel

**Step 2:** Modify the information of the selected task then click **Save** to finish.



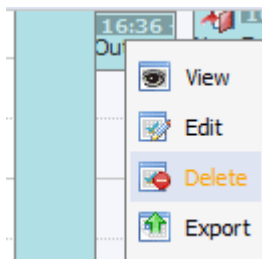
- When editing the task, you can add, remove the attachment files or download them by directly clicking their titles.
- If you only want to change the starting date and time of the task, you can also use drag and drop feature to edit the time for the task directly on the Calendar view pane.
- You can 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:**

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



**Step 2:** Click **OK** in the confirmation message.

When you are in month view, you have to tick the checkboxes in front of the event you



want to delete then click  on the action bar.

**Step 2:** Click **OK** in the confirmation message.



*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 conveniently. You only need to click and hold your cursor over the task, drag and drop it to a new day and a new time area in the Calendar view pane.

- To change task duration (in day view, week view and working view only), use your cursor and the control at the bottom of the tasks.
- According to features of the Calendar view pane, 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 ticking their checkboxes and using the drag and drop feature.



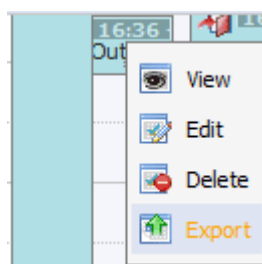
*You can only drag and drop tasks in the personal, shared and group calendars which you have edit permission. If you drag and drop the task that you do not have edit permission, you will receive a warning message informs that you are not allowed to edit this event/task'.*

### 3.6.6 Export a task

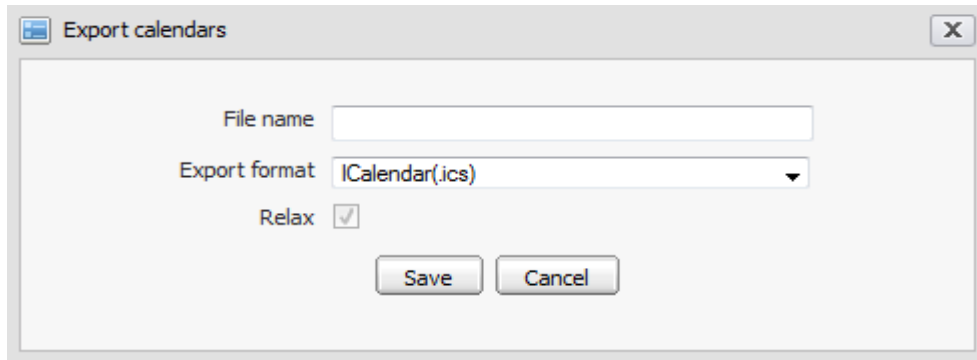
This function allows exporting one task to a separate file on your computer.

- ✓ **To export a task:**

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



The Export calendars form will appear:



**Step 2:** Enter the file name and export format

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

**Step 4:** Click **OK** on the pop up that appears 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 Import Calendar for more details.

## 3.7 Search events/tasks

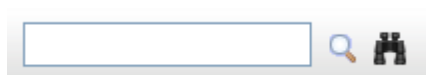
This function allows finding existing events/tasks according to specific search conditions easily. There are 2 search types: **Quick search** and **Advanced search**.

### 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 returned.

- ✓ **To conduct a quick search:**

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



**Step 2:** Click  .

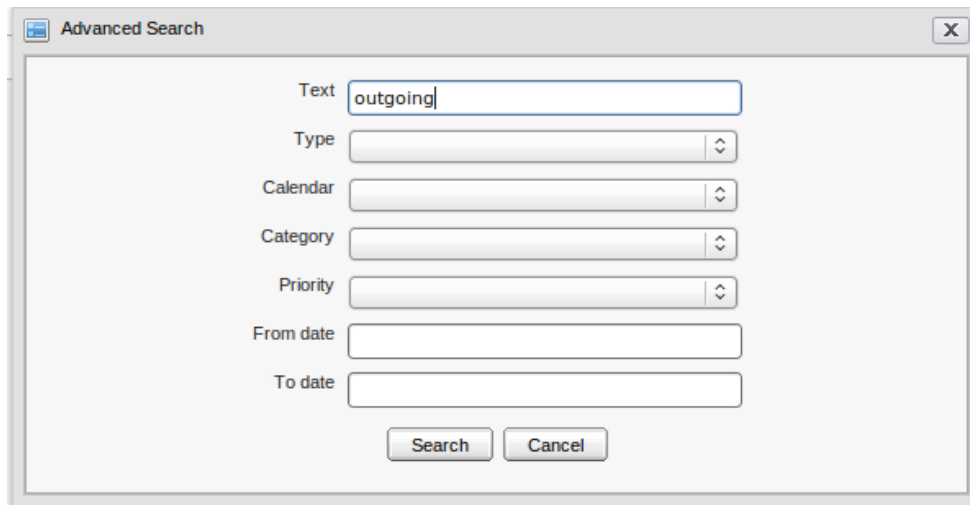
### 3.7.2 Advanced Search

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

- ✓ To perform an Advanced search:

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

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



**Illustration 33: The Advanced Search form**

In this form, you can input your search criteria:

<b>Text</b>	The search term or keyword for searching
<b>Type</b>	The item to search. There are 3 options: leave Blank for searching both events and tasks
<b>Calendar</b>	The calendar to conduct the search.
<b>Category</b>	The category of event/task to conduct the search. 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.
<b>Priority</b>	There are 4 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.
<b>From date:</b>	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.
<b>To date:</b>	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.

**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 will be listed in the search result form.

QuickAdd Event Task Today Day Week Month Year List Work week Settings RSS

outgoing

February, 2010

Priority	Summary	Start	End
	Outgoing activities	02/23/2010 03:30	02/23/2010 20:45
	Outgoing activities	02/23/2010 16:36	02/23/2010 16:51

Total pages: 1

Close Search

Calendars

Personal calendars

My group

Default

Relax

Manager

Illustration 34: The Search result form

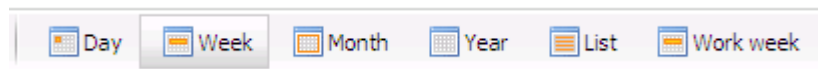


*In the search result form, you can also view, edit or delete an event/task by right-clicking it and select the action in the pop-up menu.*

## 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 toolbar to make it easy for you to see activities in your calendar. However, changing the calendar view from the main toolbar only has effect for current session. In the next time, go to the Calendar application. The view will be returned to what has been set in your calendar settings.

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



- **Day view:**

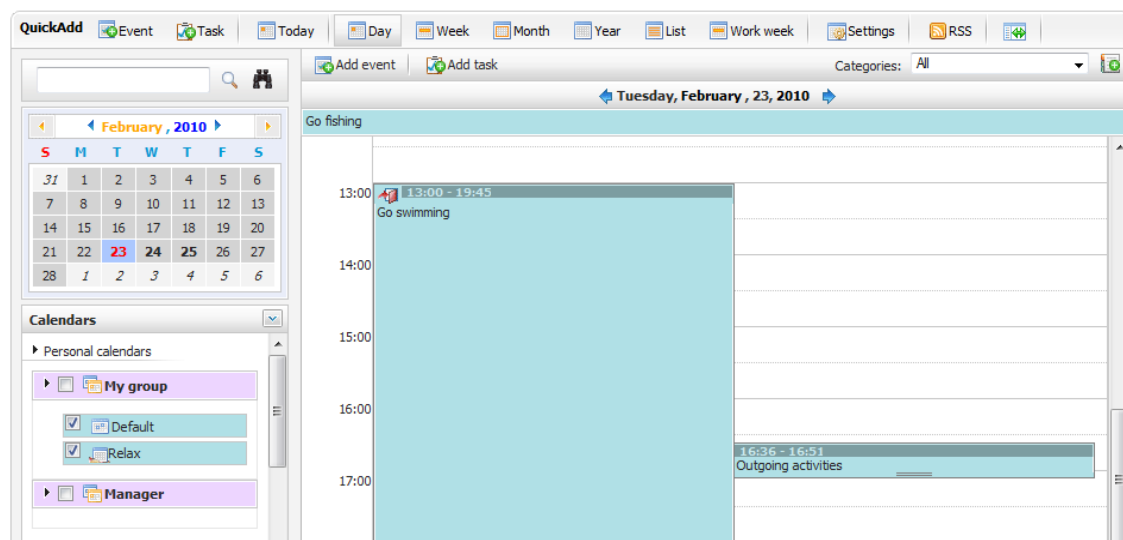


Illustration 35: The Day View

- **Week view:**

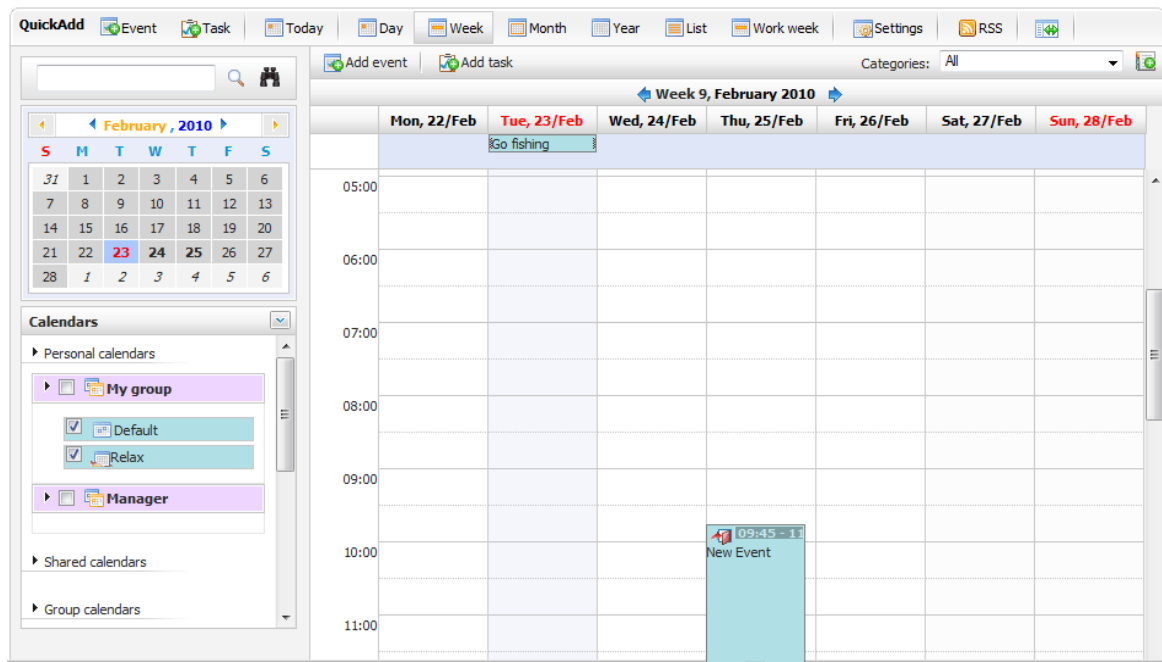


Illustration 36: The Week View

- **Year view:**

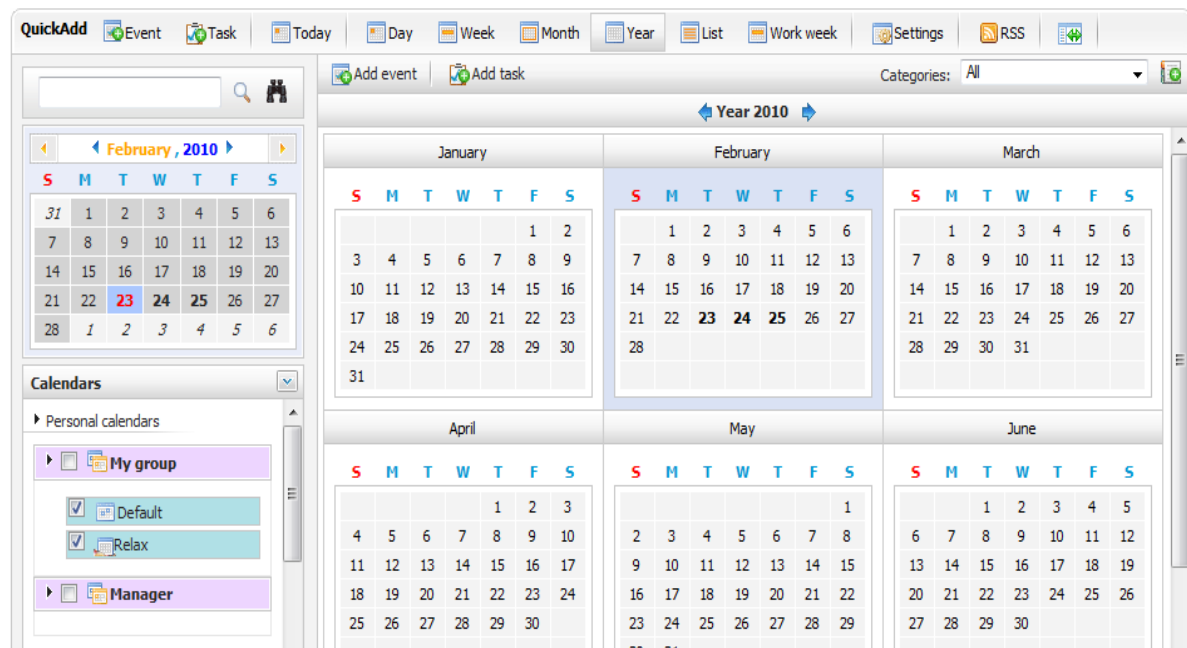


Illustration 37: The Year View

- List view:

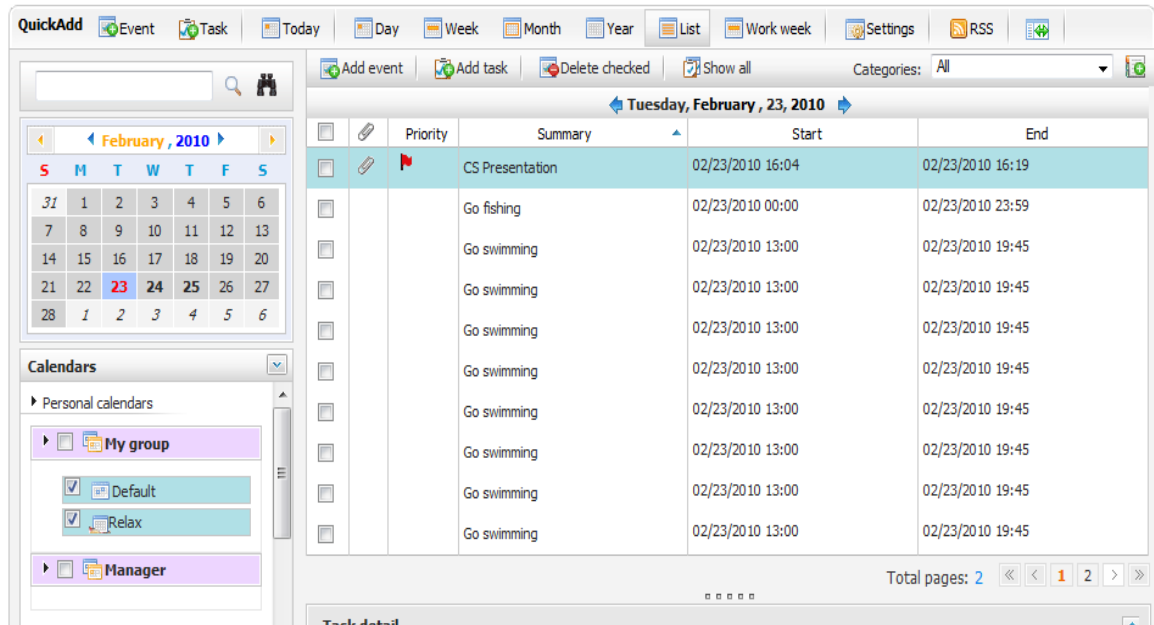


Illustration 38: The List View

- Work week view:

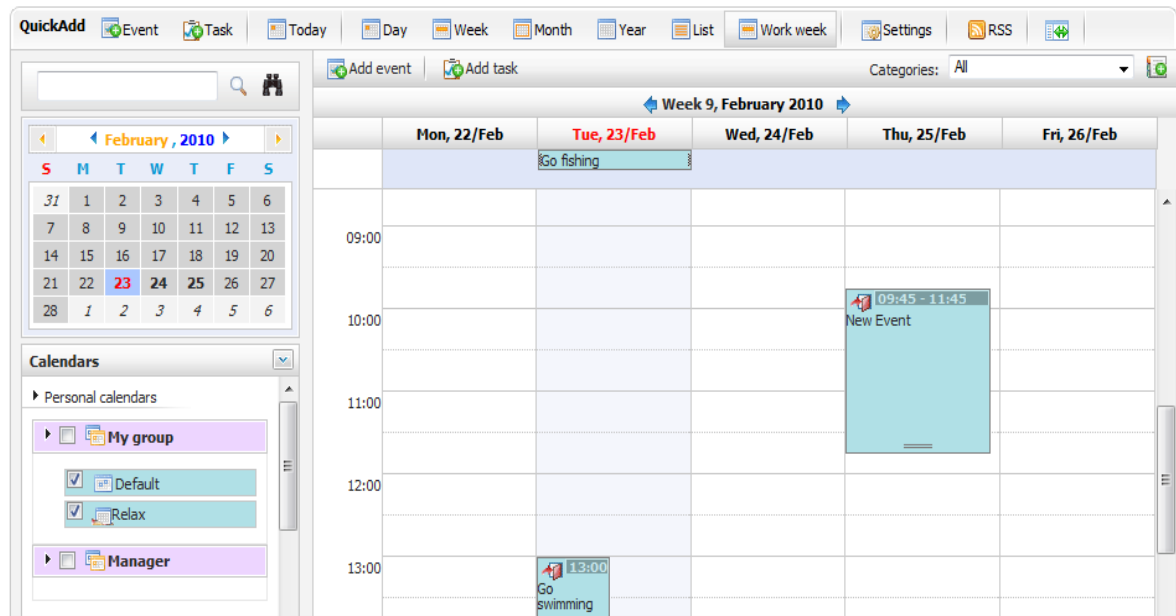


Illustration 39: The Work Week View

- **Month view:**

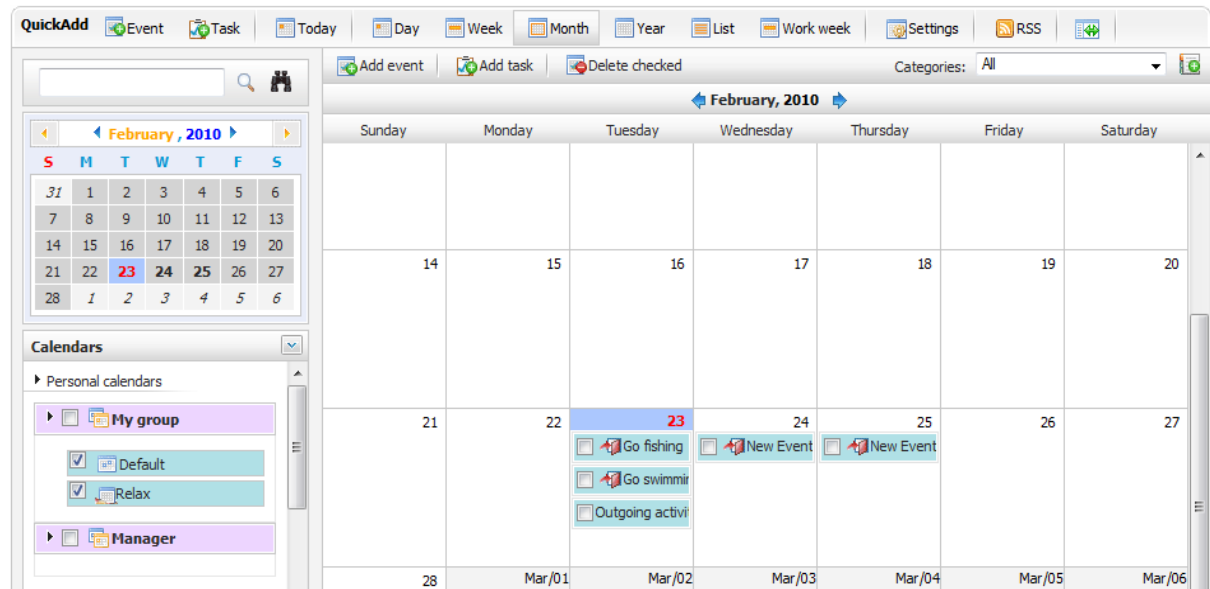


Illustration 40: The Month view

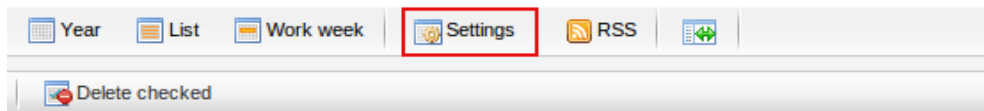


## 3.9 Calendar Settings

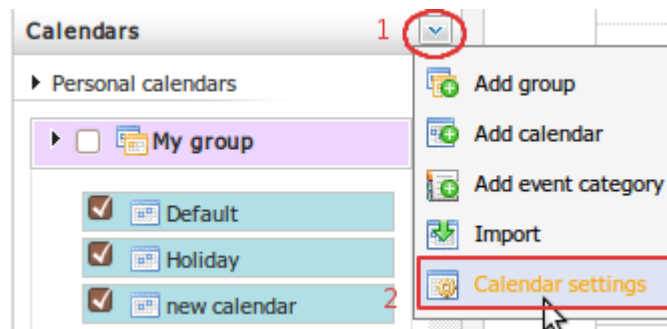
Calendar offers wide range of custom settings to set your own calendar.

- ✓ To access the **Calendar settings**:

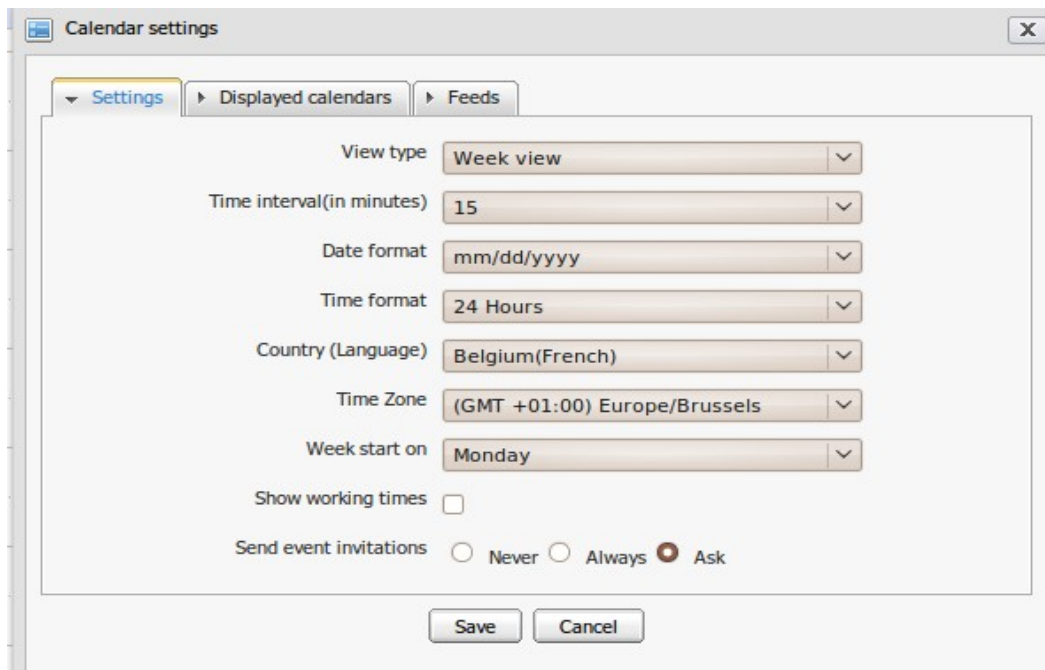
The 1<sup>st</sup> way: Click  on the main toolbar.



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



The **Calendar settings** form will appear:

A screenshot of the 'Calendar settings' dialog box. It has three tabs: 'Settings' (selected), 'Displayed calendars', and 'Feeds'. The 'Settings' tab contains various configuration options: 'View type' (Week view), 'Time interval(in minutes)' (15), 'Date format' (mm/dd/yyyy), 'Time format' (24 Hours), 'Country (Language)' (Belgium(French)), 'Time Zone' ((GMT +01:00) Europe/Brussels), 'Week start on' (Monday), 'Show working times' (unchecked), and 'Send event invitations' (radio buttons for Never, Always, and Ask, with Ask selected). At the bottom are 'Save' and 'Cancel' buttons.

■ The **Settings** tab includes:

## Details

<b>View type</b>	The view type of Calendar View Pane. You can define the default view type when you start the Calendar application (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 Pane.
<b>Country(Language)</b>	The default geographical location displayed in Calendar..
<b>Time Zone</b>	The default Time zone displayed in Calendar.
<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>	<p>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:</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><li>• <b>Asked:</b> There will be a confirmation message to ask whether you want to send the invitation or not.</li></ul>

■ The **Displayed calendars** tab:

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

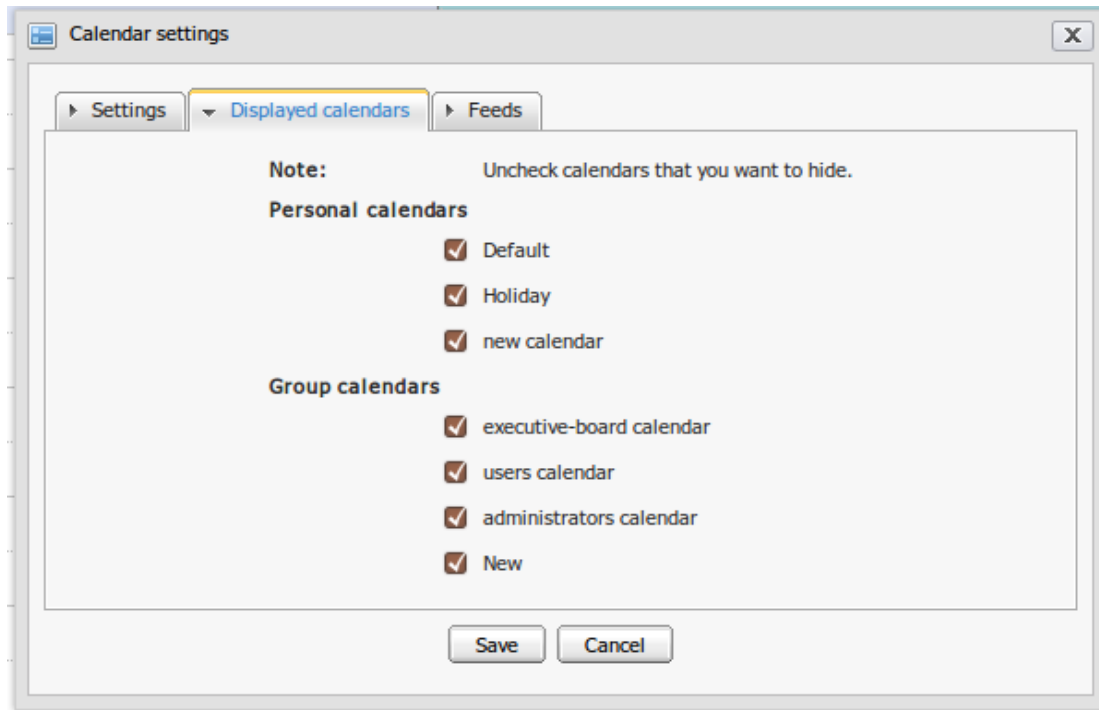


Illustration 41: The Displayed calendars tab of Calendar settings form

## 3.10 Generate RSS

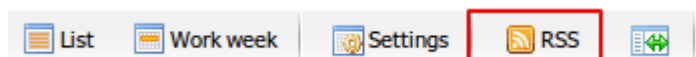
This function allows you to publish your calendar as a RSS feed. It will build an URL that help you keep track of all events via a RSS reader.

### ✓ To generate RSS in a calendar:

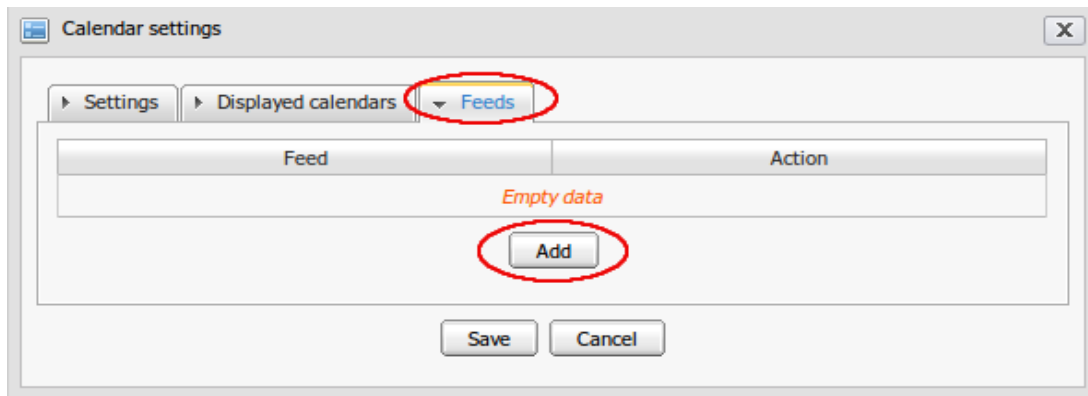
#### Step 1:

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

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:

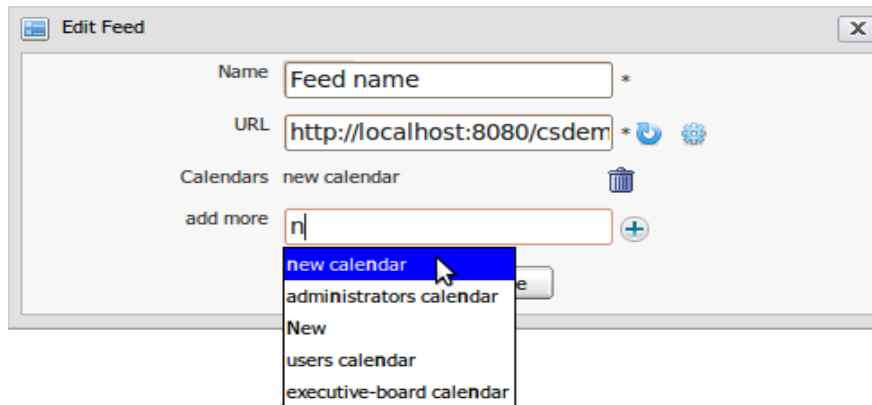
Illustration 42: The Edit Feed form



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.

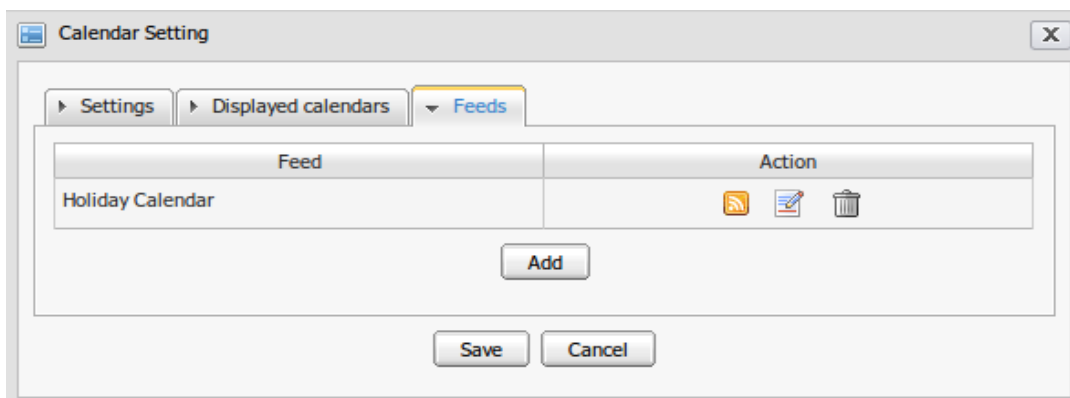
**Step 4:** Input the name of calendar that you want to get RSS feed in the **add more** field.



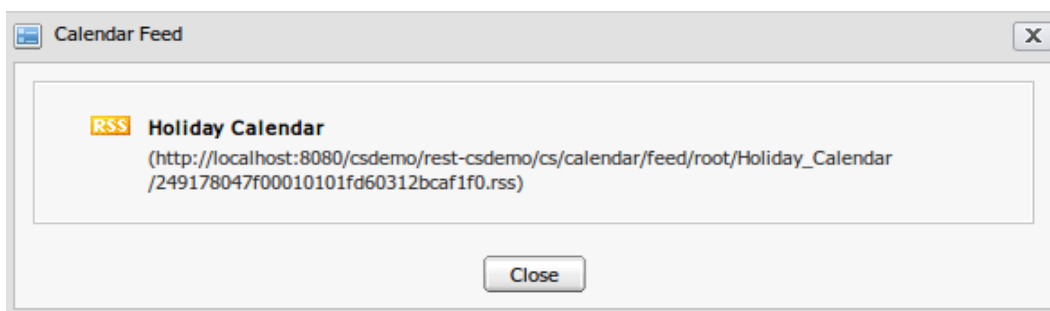
**Step 5:** Click the  icon to add more calendars. You also can delete an added calendar by clicking on the  icon corresponding to the calendar name.

**Step 6:** Click **Save** to accept generating the feed, then click **OK** in the message dialog that appears.

The created feed will be shown like the illustration below:



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



Copy and paste this address link into any calendar product which supports RSS. Then you can view calendar directly in that application.

## 4 eXo Collaboration Chat

### 4.1 Get started

#### 4.1.1 What is eXo Collaboration Chat?

Chat is an application of eXo Collaboration – an extension of eXo Platform. In Platform you can chat with other users quickly with an easy-to-use integrated text messaging application. Sending instant messages in eXo Collaboration Chat is as easy as type and click. This Chat portlet provide you the ability to create chat room and add contacts from your Collaboration Address Book to your friend list. More importantly, you can chat with other people in real time while using other Collaboration applications. This is useful when you want to have instant communication with your contact without sending emails to save time and enhance the productivity.

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



#### 4.1.2 What you can do with eXo Collaboration Chat?

With eXo 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

#### 4.1.3 What is Chat room?

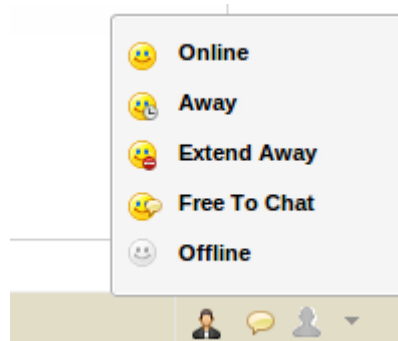
A chat room is a place where people with similar interests can meet and communicate with each other. People can often enter an un-moderated chat room without any verification of who they are. With Chat portlet of eXo Collaboration, you also create a chat room and invite other users join your room. In 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.

## 4.2 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:**

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



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

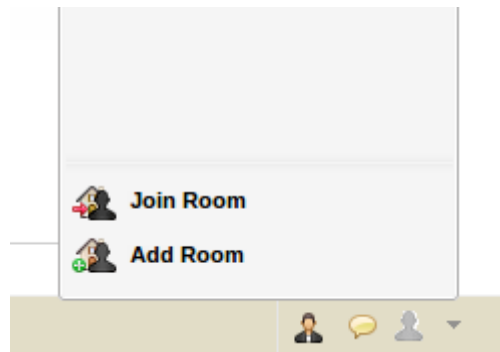
- **Online:** This status means you are available to communicate, other users can contact you by sending instant messages. Your contacts will see the icon 😊 next to your account.
- **Away:** This status means you are away from computer. Other users still can send instant messages to you. Your status 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 offline though you are actually online.

## 4.3 Create a chat room

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

✓ **To create a chat room:**

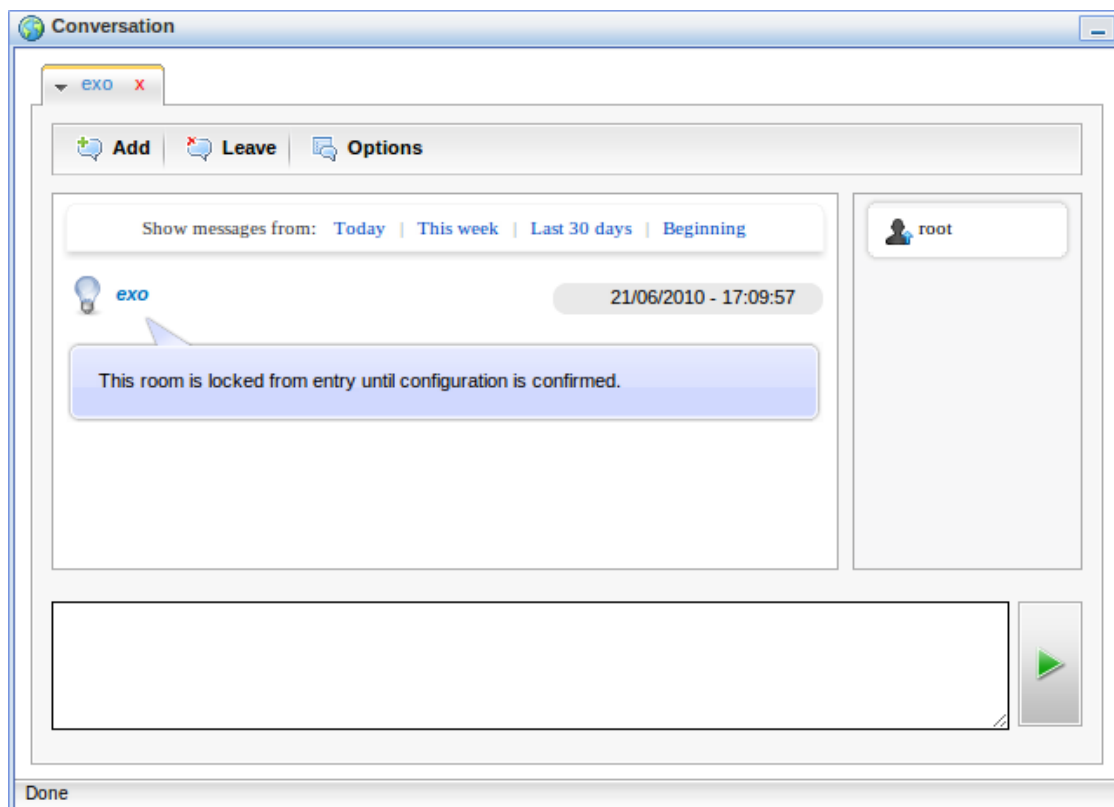
**Step 1:** Click the icon 🗨️, then click  **Add Room** in the pop-up menu.



The **New Room** form will appear:

**Step 2:** Enter the room name then click **OK** to accept.

After creating a new room, there will be a **Room Configuration** and **Conversation** window opened but in locked status.



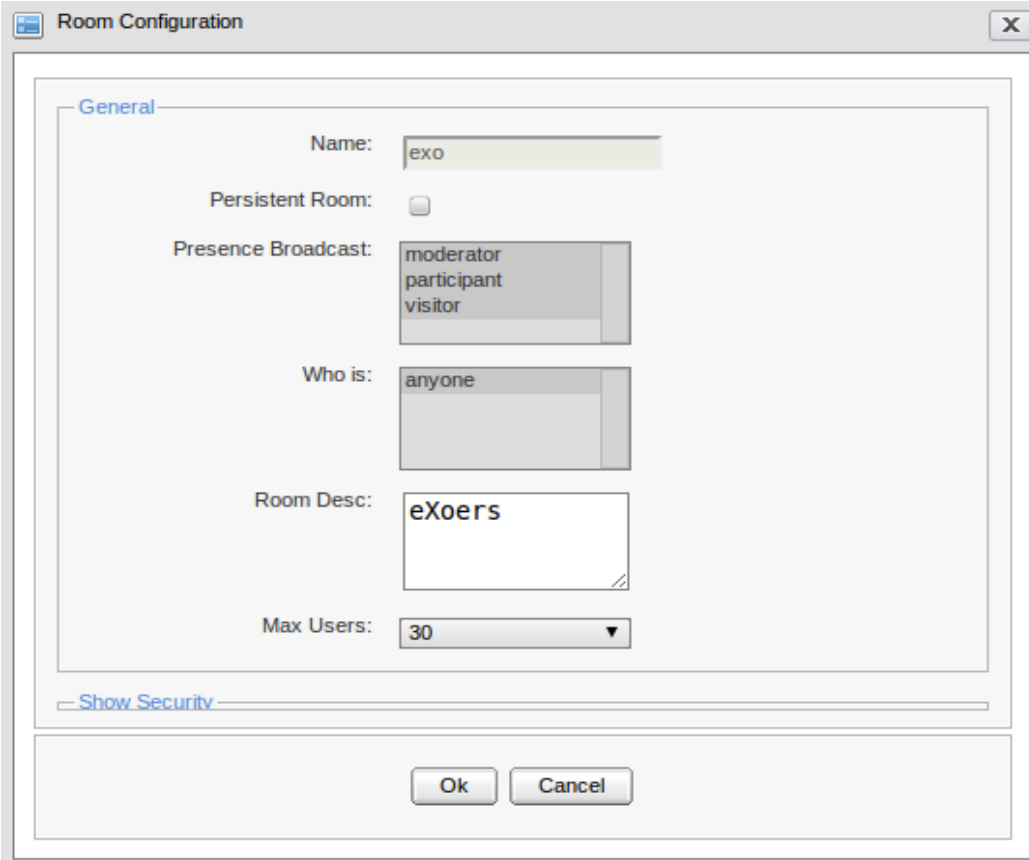


With this status, both creator and other members cannot join this room to chat until the room configuration is completed.

**Step 3:** Configure your chat room.

In this step, you can give name and description of your chat room as well as select a group of user to be sent notifications about changes in members status. Moreover, you can set the security settings, which will allows you to create password protected room or select room administrator and moderator. Read below to find out how:

**Enter room details:**

A screenshot of the 'Room Configuration' dialog box. The 'General' tab is selected. It contains the following fields: 'Name' with the value 'exo', 'Persistent Room' with an unchecked checkbox, 'Presence Broadcast' with a dropdown menu showing 'moderator', 'participant', and 'visitor', 'Who is' with a dropdown menu showing 'anyone', 'Room Desc' with the text 'eXoers', and 'Max Users' with a dropdown menu showing '30'. At the bottom, there is a 'Show Security' link and 'Ok' and 'Cancel' buttons.

Room Configuration

General

Name:

Persistent Room: ☐

Presence Broadcast:

Who is:

Room Desc:

Max Users:

[Show Security](#)

Ok Cancel

<b>Persistent Room</b>	A persistent room is one that does not get closed when there are no members in it.
<b>Presence Broadcast</b>	The user group that will be sent 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.

**Set the Security settings:** To show security information, click **Show Security** in the **Room Configuration** form.

The screenshot shows the 'Room Configuration' dialog box with the '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' fields both contain 'Root Root'.

**Room Configuration**

— Show General —

**Security**

Public Room: ☒

Members Only: ☐

Allow Invites: ☐

Reserved nick: ☐

Password Protected Room: ☐

Moderated Room: ☐

Room Admins:

Room Owners:

Ok Cancel

Details:



<b>Public Room</b>	When this option is checked, all users can join this room.
<b>Member Only</b>	This option is to created a room for members of that created room only
<b>Allow Invites</b>	This option is to grant room's members permission to invite other users to join chat room
<b>Reserved nick</b>	This option is to prevent anonymous users from joining chat 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 used to protect the room. This field is shown only when the <b>Password Protected Room</b> option is selected.
<b>Room Admins</b>	This option is to select the administration of the created chat room. It's only available when <b>Moderated Room</b> option is selected.
<b>Room Owners</b>	The email address of room's creator.

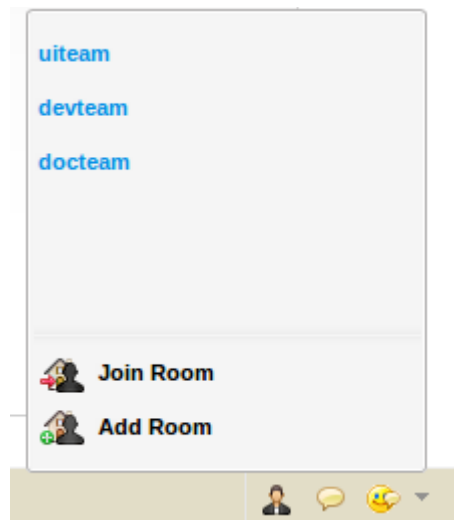
**Step 4:** Click **OK** to complete the room configuration process.

## 4.4 Join a room

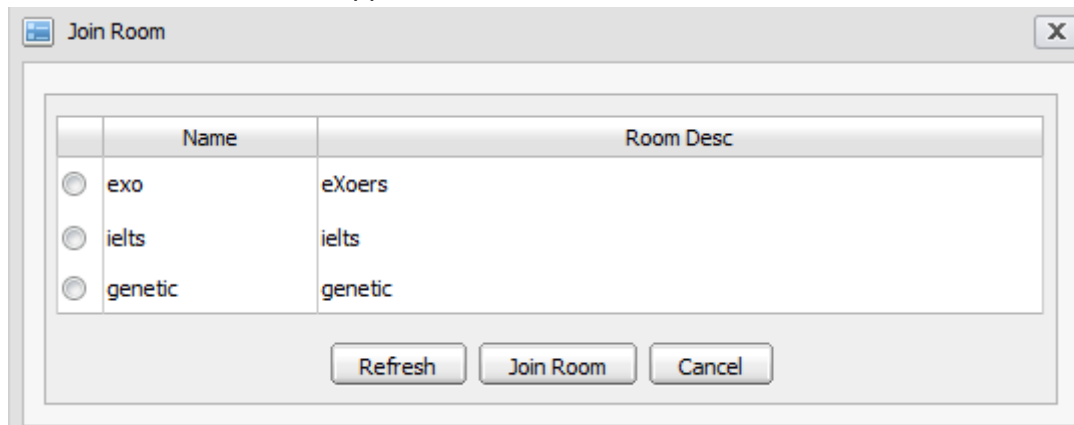
Joining a chat room is simple and fast. When joining a chatroom, you can learn more about a subject, ask questions and talk to others with a common interest. If you're ready to start talking, you can join a chat room in just seconds.

✓ **To join a room:**

**Step 1:** Click the  icon on the chatbar then click  **Join Room** in the pop-up menu:



The **Join Room** form will appear:

A screenshot of a 'Join Room' dialog box. It 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 43: List of available room for you to join

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

**Step 3:** Click **Join Room** 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 like this:

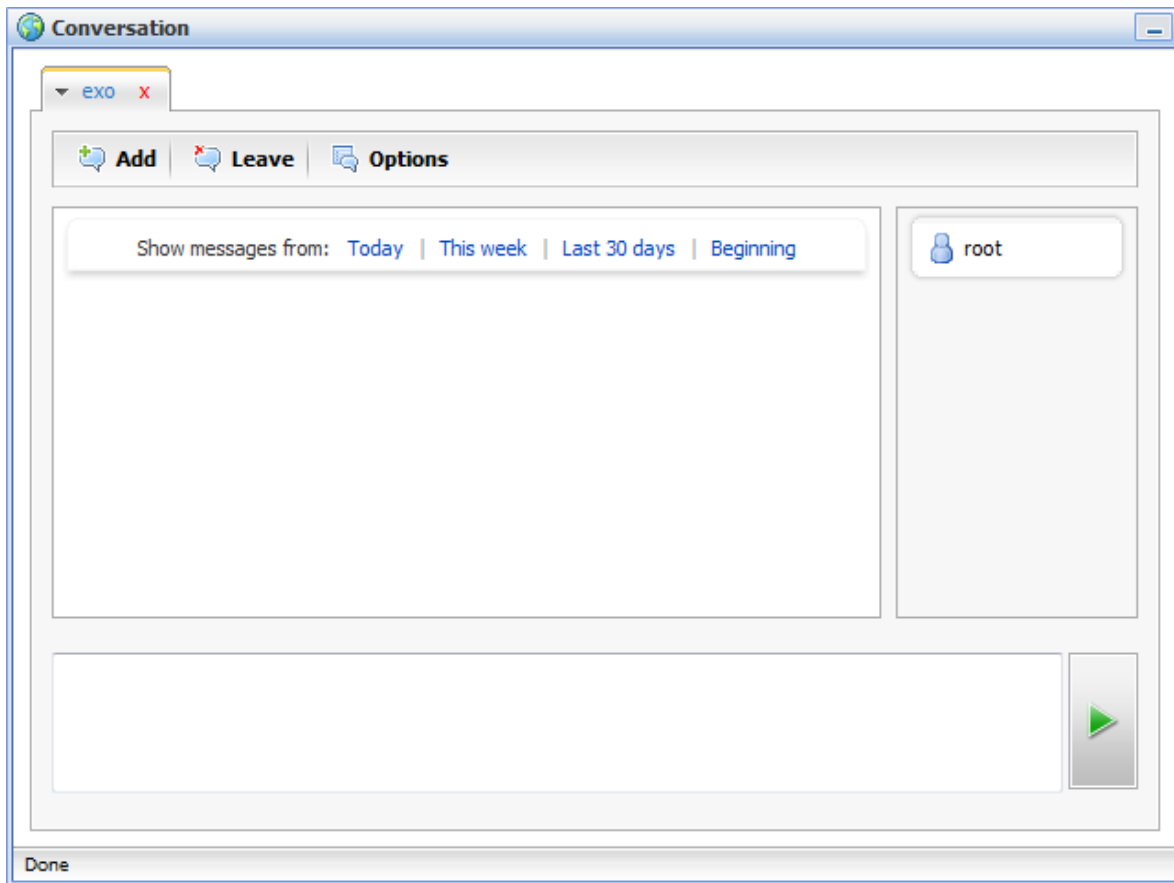


Illustration 44: The Conversation window after joining a room



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

## 4.5 Start a new text chat

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

- ✓ **To send an instant message:**

**Step 1:** Click the contact name that you want to chat in the contact list.

The Conversation window will appear:

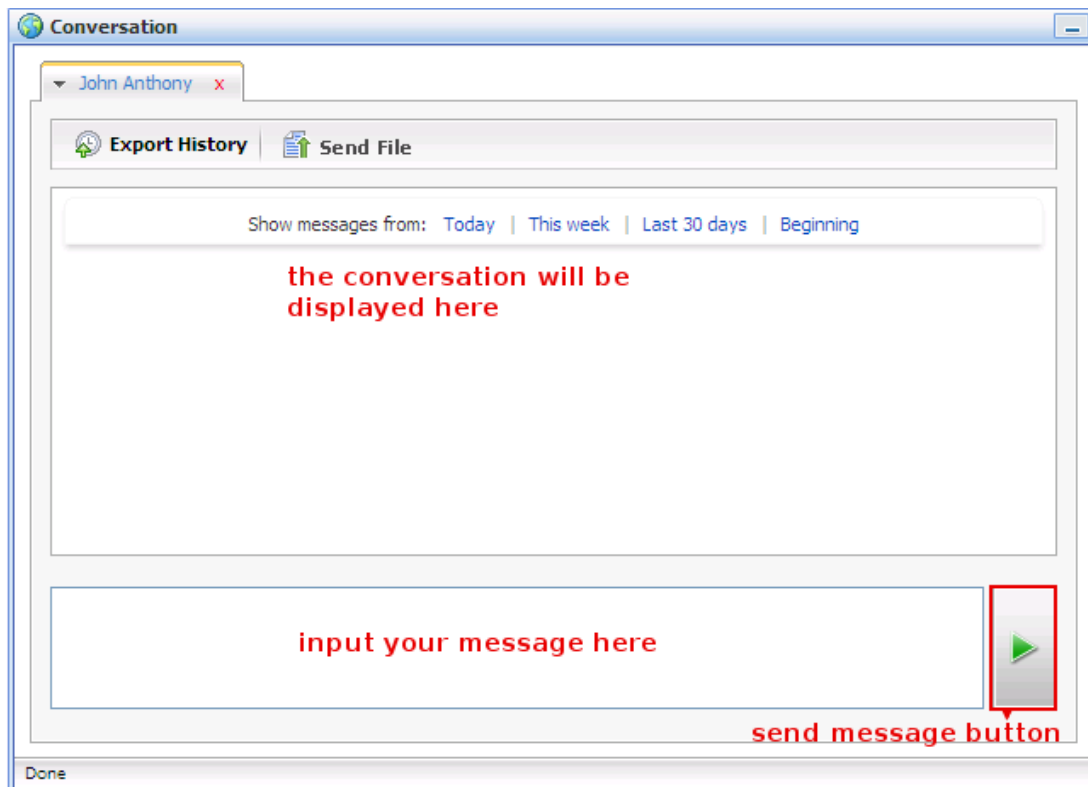
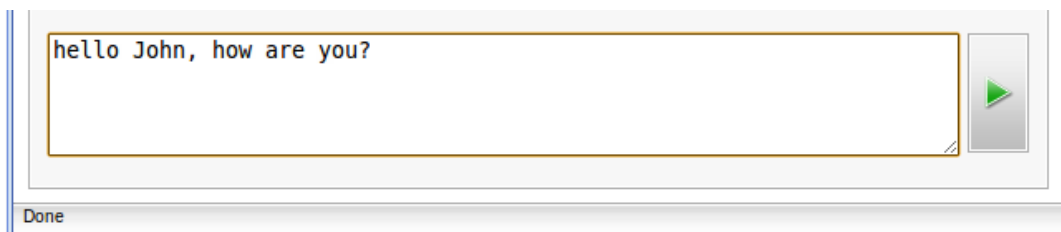



Illustration 45: The Conversation window when starting chat with the other contact

**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.

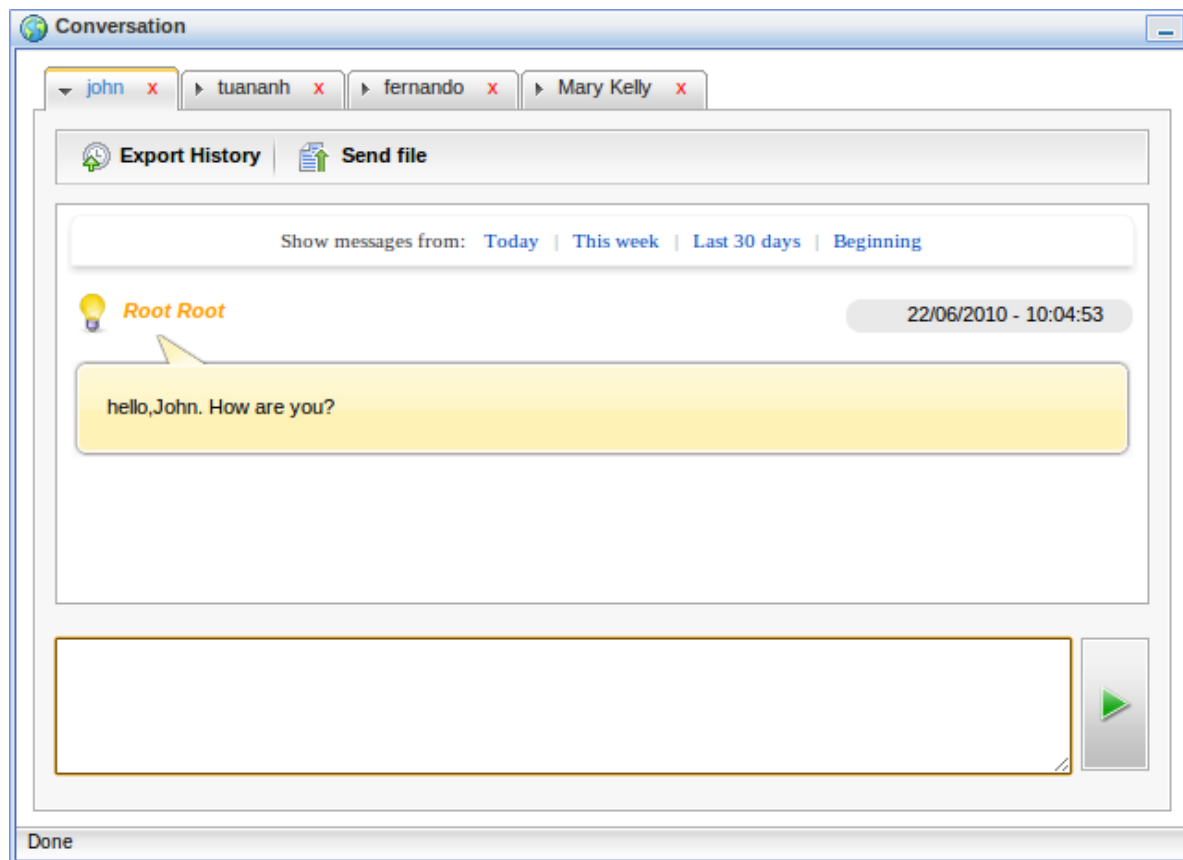




Illustration 46: The Conversation window after sending a instant message

You can click the icon  on the right corner of the Conversation window to minimize any conversation window to the chat bar. To restore the window, simply 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.*

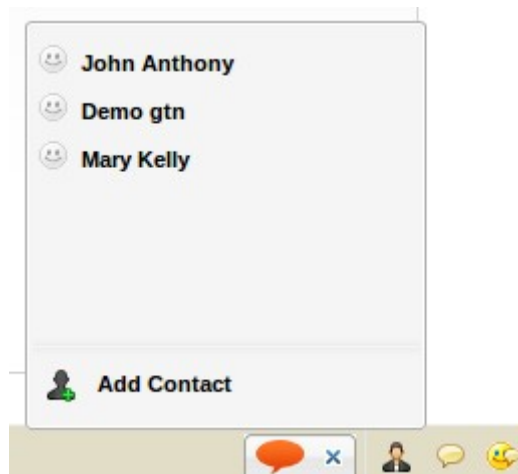
*You can chat with several contacts at the same time. Each conversation is displayed in its own tab. You can switch between tabs to follow different ongoing conversations.*

## 4.6 Add a contact to friend list

You may invite several people to participate in a chat room with you if you are the room creator or that room allows members to invite others. You can easily search other contacts in your Collaboration Address Book and add them to your friend list.

✓ **To add a contact to your friends list:**

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



The **Add Contact** form will appear:

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

Illustration 47: Contacts from your eXo Collaboration Address book

**Step 2:** Select one or more contacts in the account list by selecting their corresponding checkboxes. 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 word will be shown:

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

**Step 3:** Click the **Add contact** button to add contacts into your friend list.

The contact that you want to add will receive your request message.


If the contact accepts, you will receive the confirmation message. Click **OK** to accept.

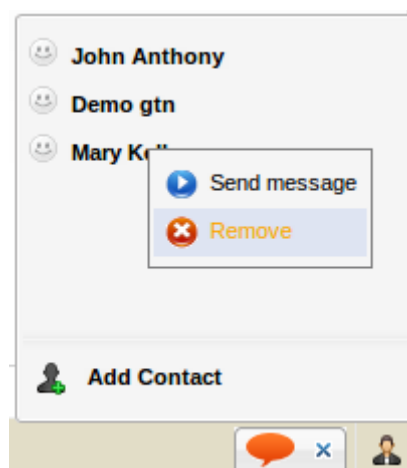
After adding contacts successfully, the added contacts will be shown in your friends list.

## 4.7 Remove a contact

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

✓ **To remove a contact:**

**Step 1:** Click  **Add Contact** on the action bar to show your friend list. Right-click the contact that you want to remove from your friend list and select **Remove** in the pop-up menu:




**Step 2:** Click **OK** in the confirmation message.



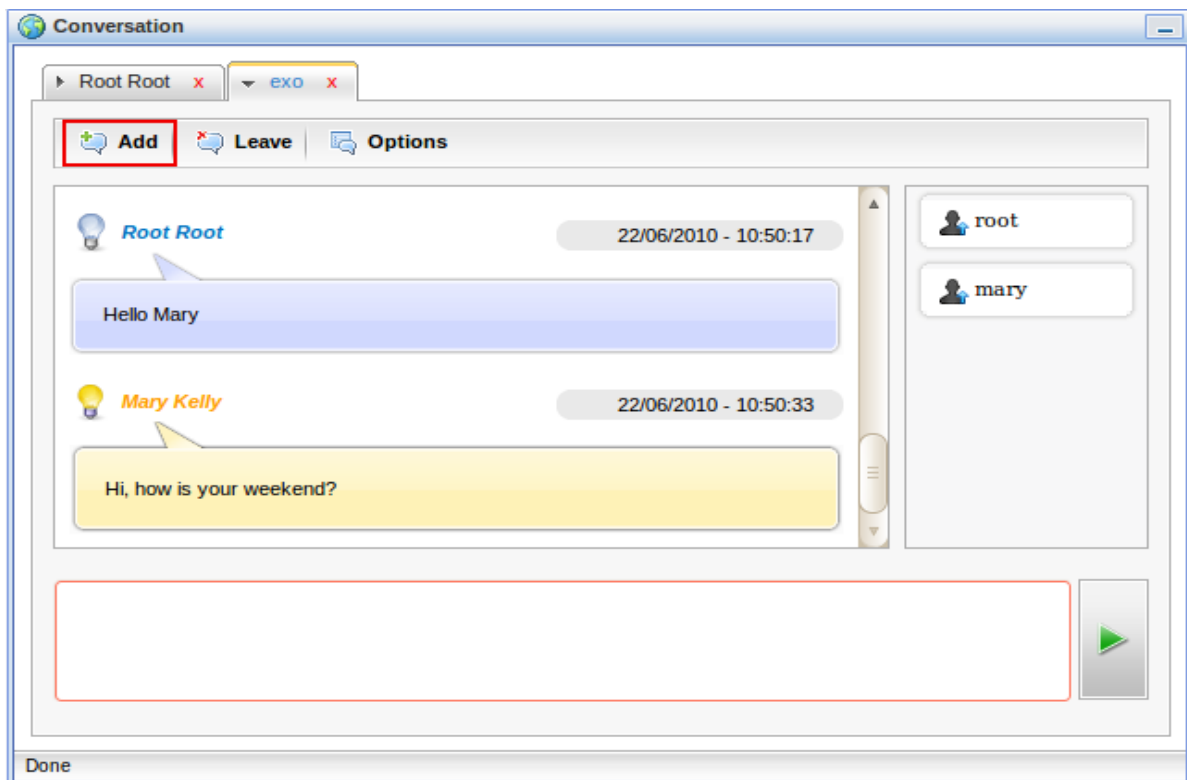
## 4.8 Add contacts to a room

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 a contact to a chat room:**

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

The **Add Contact** form will appear:

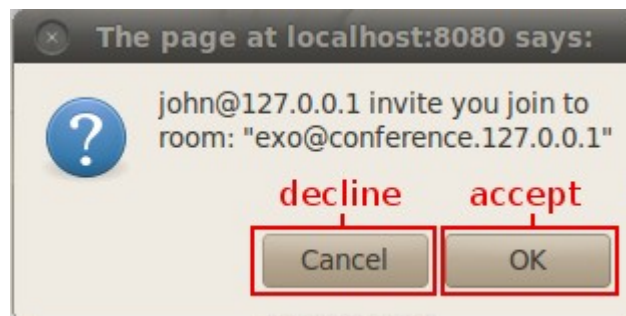


**Step 2:** Select contacts you would like to invite by ticking their checkboxes corresponding to the contact names.

You might want to search contacts through your Address book, just enter the search term in the Search box. It can be first name, last name or user name. All contacts that match with the search term will be displayed in a result list.

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

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



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

## 4.9 Leave a chat room

- ✓ To leave a chat room:



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

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

## 4.10 Room Configuration

As you know, you are required to configure the chat room before a chat room opens. However, you are also able to update the room configuration after the chat room was created. If you are not the owner or Administrator of chat room, you do not have the permission to perform this action.

- ✓ To configure a chat room:

**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.



*The chat room configuration is available only if you are the owner or Administrator of that chat room. You can change the room owner and select room Administrator in Room Configuration.*

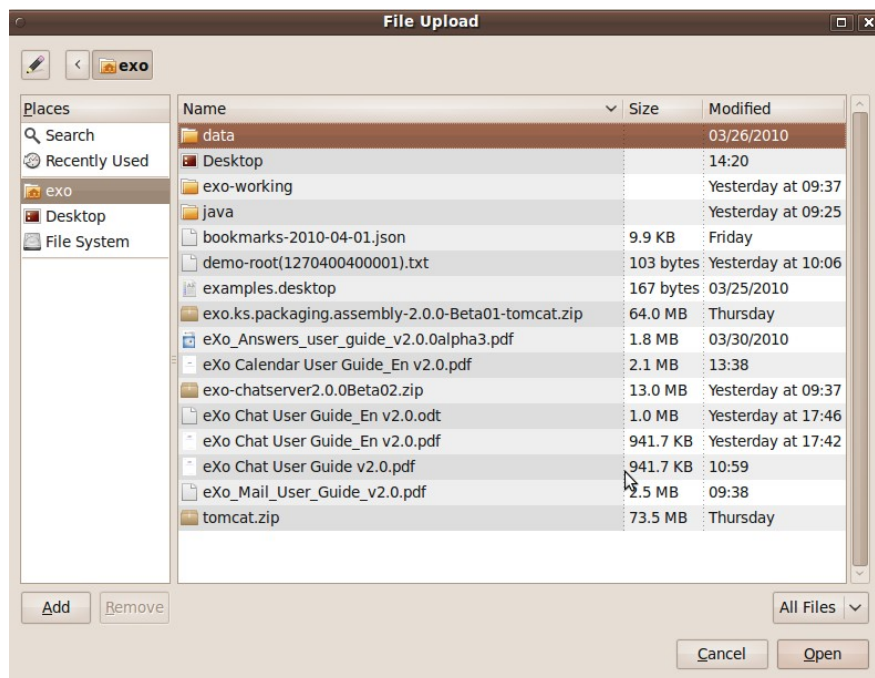
## 4.11 Send files

When you're instant messaging one of your friends on eXo Collaboration Chat, there are times when you want to convey more information to them than just 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, eXo Collaboration Chat can send it for you. Follow these steps to find out how.

✓ **To send file to a contact:**

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.



Locate and select the file you want to send hitting **Open**. Your file is now being sent. The

receiver will have options to deny or accept the file transfer



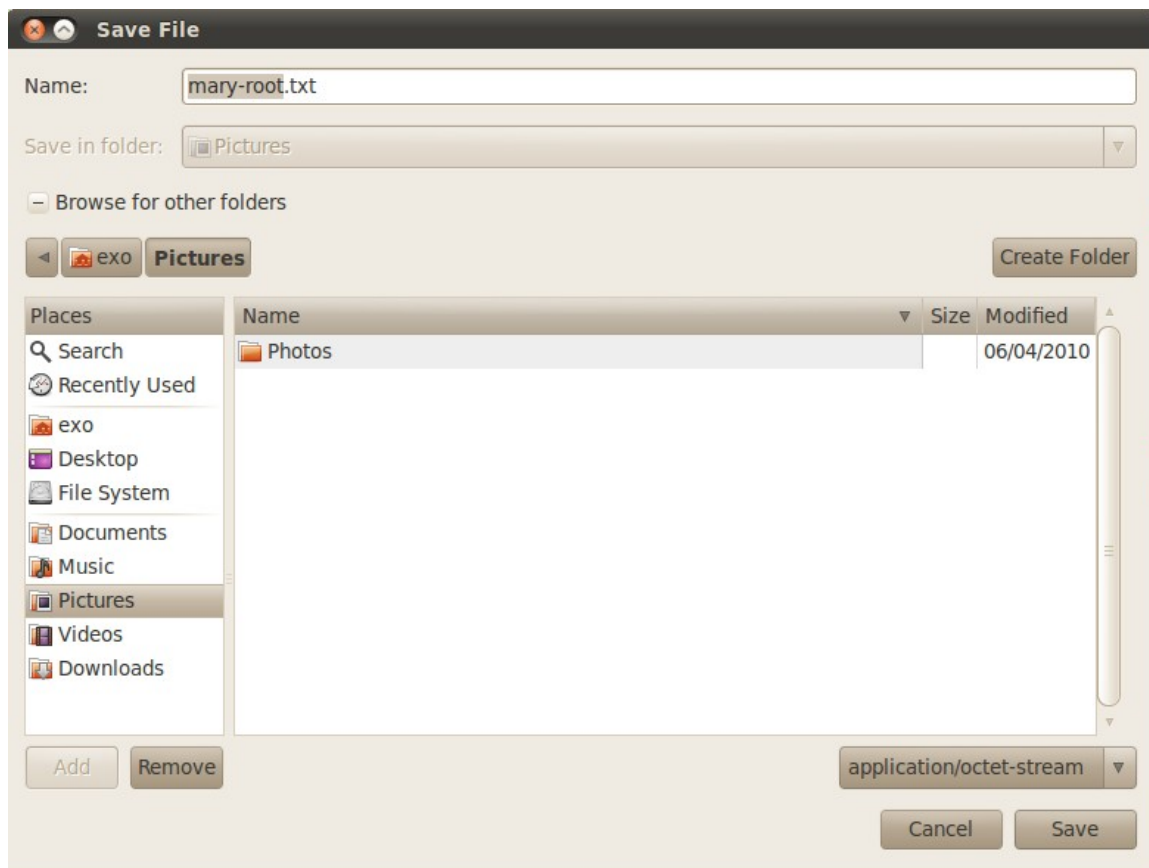
## 4.12 Export chat history

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

### ✓ To export a chat history:

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

You will be prompted to select the location to save the exported file.



**Step 2:** Select the location to save the file, then click **Save** to save the exported file to your local computer.

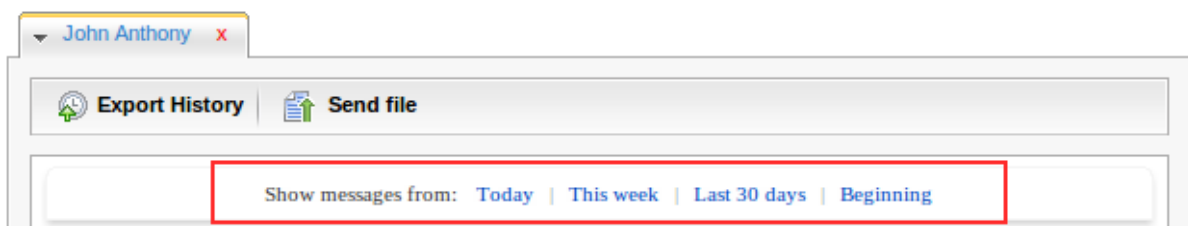
You will have a text file which logs all of your conversation messages.

## 4.13 Show messages in a specific time

Your chat messages history can be shown in a specific time interval.

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

**Step 2:** Select a time interval.



Currently, **eXo Collaboration Chat** shows 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.

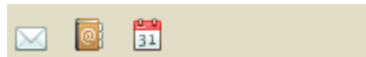
## 5 eXo Collaboration Mail

### 5.1 Get started

#### 5.1.1 What is eXo Collaboration Mail?

eXo Collaboration Mail is a webmail application of eXo Collaboration product. With eXo Collaboration Mail, you can receive your emails whenever just by using a common web browser. Mail is smoothly integrated with other Collaboration applications like Address Book and Calendar. This integration helps you enhance the quality of group activities.

To access the Mail portlet, click the Mail icon  right from the Chat bar:



#### 5.1.2 What you can do with eXo 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 allows users to define rules to sort incoming message as they arrive your account
- ✓ 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.

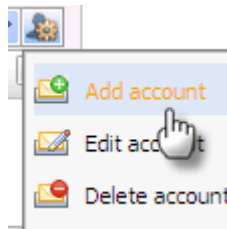
## 5.2 Account Management

In order to get mails from the other mail service, you need to create an account in eXo Collaboration Mail which will connect to another mail server supporting POP3, SMTP like Gmail, Yahoo Mail, Hotmail, GMX, Cyrus, Exchange Server, and more. eXo Collaboration Mail allows you to manage your account, such as adding, editing, deleting accounts which may get mails from different mail services at one place.

### 5.2.1 Add an account

✓ **To add an account:**

Open the **Create a new account** form by clicking  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:** Add basic information: Account name and Description.

Illustration 48: Step 1: Account name & description

**Step 2:** 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

[Back](#) [Next](#) [Cancel](#)

**Illustration 49: 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 with your email address when you composes 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.
<b>Signature</b>	The signature texts which are automatically inserted at the bottom of every message you send.

**Step 3:** Click **Next** 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

Illustration 50: Step 3 – Server information

Details:

<b>Server Type</b>	Type of the mail server. There are two options: - POP3 (Post Office Protocol version 3) is a protocol to get email from a remote server. - IMAP (Internet Message Access Protocol) which retrieves e-mail from a remote server over a TCP/IP connection. By default, 'POP3' is selected. Select one that the your mail server supports.
<b>Incoming mail server &amp; Outgoing mail server</b>	The Incoming Mail Server (POP3) and Out going Mail Server (SMTP) of the email provider which you are using. Each email provider has different Incoming Mail Server and Out Going Mail Server settings. By default, the value of this field is "pop.gmail.com" and "smtp.gmail.com" which is the settings for Gmail. For settings of other mail servers, you can find the information on their website. For example, Hotmail Incoming Mail Server and Out going Mail Server settings is pop3.live.com and smtp.live.com. For more details, see <a href="#">5.3 Incoming and Outgoing Mail Server settings</a>
<b>Use incoming SSL</b>	This 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, and more. Incoming SLL allows using SSL to check incoming emails.
<b>Use outgoing SSL</b>	This option is to use SSL to send mail in the eXo Collaboration Mail application.

**Step 4:** 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

**Illustration 51: 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. (Required).
<b>Password</b>	The password that corresponds to your email address. 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>	<ul style="list-style-type: none"><li>- If this option is checked, each time when you check mails, you needn't enter password again.</li><li>- If this option is not checked, there will be a message that requires you to enter your password anytime you check mail.</li></ul>
<b>Do not download all messages (IMAP only)</b>	Check this option if you don't want to download all messages.
<b>Limit to messages arrived since</b>	Enter the time to limit the messages to be downloaded.

**Step 5:** 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 52: 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.

Check **Start downloading messages now** when you would like to get messages automatically right after completing the new account creation process.

**Step 6:** Click **Finish** to complete.

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


	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] Should 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 V	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

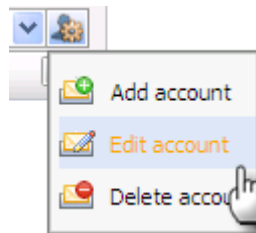
## 5.2.2 Edit account details


The function allows making changes to existing mail accounts.

**To edit account details:**

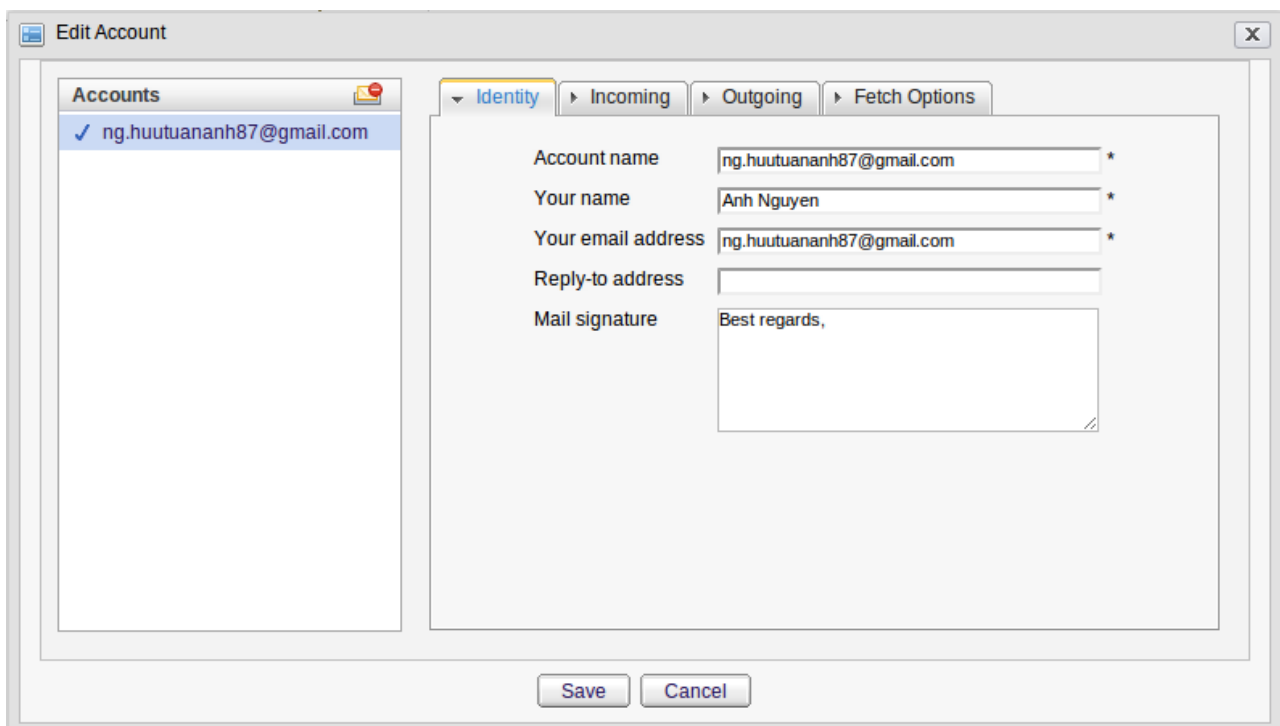
**Step 1:** Open the **Edit account** form by two ways:

**The 1<sup>st</sup> way:** Open the **Edit Account** form by clicking the icon  on the left pane 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.

After following one of these method above, the **Edit Account** form will appear:



**Edit Account**

**Accounts**

- ✓ ng.huutuananh87@gmail.com

**Identity** | Incoming | Outgoing | Fetch Options

Account name: ng.huutuananh87@gmail.com \*

Your name: Anh Nguyen \*

Your email address: ng.huutuananh87@gmail.com \*

Reply-to address:

Mail signature: Best regards,

Save Cancel

**Illustration 53: 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, and more.

- 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, the 'Accounts' list contains 'ng.huutuananh87@gmail.com'. The main area has tabs for 'Identity', 'Incoming', 'Outgoing', and 'Fetch Options'. The 'Incoming' tab displays the following settings:

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

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

- 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. The 'Accounts' list on the left remains the same. The 'Outgoing' tab displays the following settings:

- 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: [masked] \*

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

Note that the default setting of the Incoming and Outgoing Mail Server port is for Gmail. You can find the setting for providers on their websites or you see [5.3 Incoming and Outgoing Mail Server](#)

settings for the most popular mail services.

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** checkbox is selected, the incoming email address and its password are displayed and disabled. If the checkbox is not selected, the incoming email can be manually inputted.

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

**Illustration 54: 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 toolbar 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.
<b>Do not download all messages</b>	Limit downloaded messages within a specific time interval.
<b>Custom Inbox folder</b>	This option allows customizing the folder containing the arrived emails. By default, it is the <b>Inbox</b> folder.

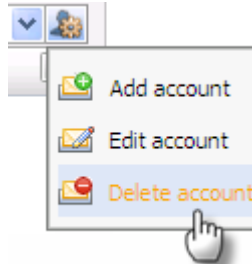
**Step 2:** Edit your account details then click **Save** to accept changes.

### 5.2.3 Delete account

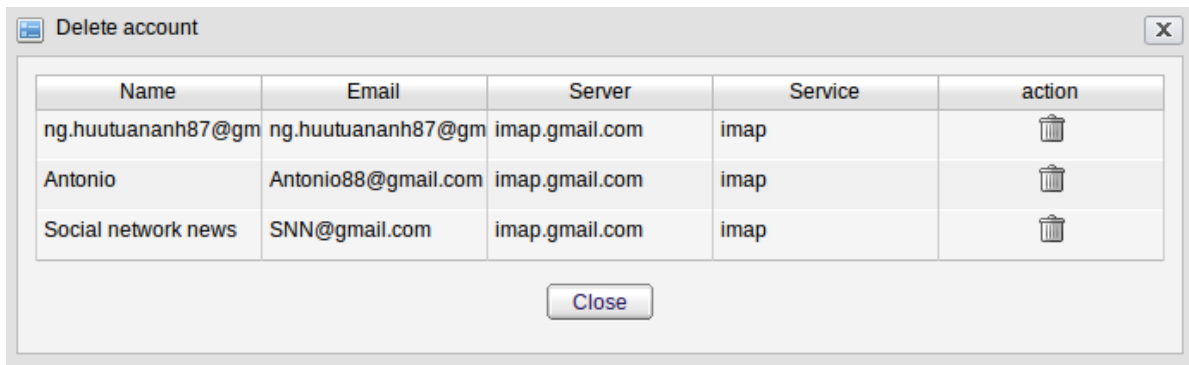
If you use multiple accounts then this function is used to delete accounts that you don't want to use any more.




**Step 1:** Select an account that you want to delete from the account list. Click the

icon  on the left pane, then click **Delete account**:




The **Delete account** form will appear:

A screenshot of a web form titled 'Delete account'. It contains a table with five columns: Name, Email, Server, Service, and action. There are three rows of account data. Each row has a trash can icon in the 'action' column. Below the table is a 'Close' button.



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 55: 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.



You also can delete other accounts when you are editing account. In the **Edit Account** form, select the account that you want to delete (the selected account will be marked by the icon  ) then click  to delete this account.

## 5.3 Incoming & Outgoing Mail Server settings

You may want to use eXo Collaboration Mail to manage different mail services in one place. To use Mail application, you have to set the Incoming and Outgoing Mail Server settings. This section will give you the Incoming and Outgoing Mail Server settings of the most popular mail service. Provided you know the server type and names, you can start creating eXo Collaboration Mail accounts quickly without technical knowledge. If you don't see your mail service in this list, don't worry, you can find these settings on the mail provider websites. Remember that eXo Collaboration Mail supports only mail servers supporting POP3 and SMTP.

### Yahoo! Mail Settings

- Yahoo Incoming Mail Server (POP3): pop.mail.yahoo.com (port 110)
- Yahoo Outgoing Mail Server (SMTP): smtp.mail.yahoo.com (port 25)

### Google Gmail Settings

- Gmail Incoming Mail Server (POP3): pop.gmail.com (SSL enabled, port 995)
- Gmail Outgoing Mail Server (SMTP): smtp.gmail.com (SSL enabled, port 465)

### HotMail settings

- Hotmail Incoming Mail Server (POP3): pop3.live.com (port: 995)
- Hotmail Outgoing Mail Server (SMTP): smtp.live.com (SSL enabled, port 25)

### MSN Mail settings

- MSN Incoming Mail Server (POP3): pop3.email.msn.com (port 110)
- MSN Outgoing Mail Server (SMTP): smtp.email.msn.com

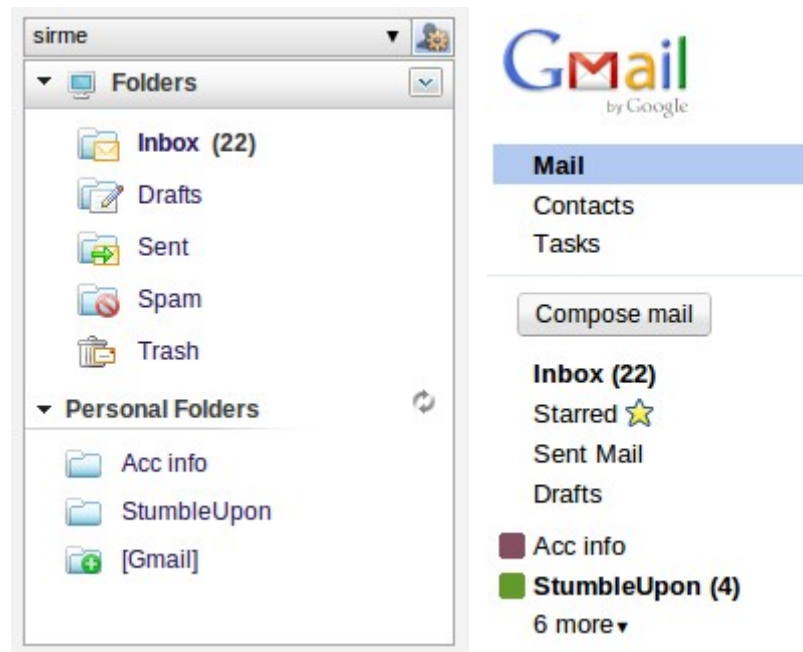
### AOL Mail Settings

- AOL Incoming Mail Server (IMAP) - imap.aol.com (port 143)
- AOL Outgoing Mail Server - smtp.aol.com



## 5.4 Folder Management

Folder helps you manage your messages more easily and flexibly. There are five special-purpose folders generated automatically after creating a new account: Inbox, Drafts, Sent, Spam, Trash and Personal Folders list. They are default folders that you can not delete or rename:



Details:

<b>Inbox</b>	This folder stores all incoming messages.
<b>Drafts</b>	This folder stores all messages which have been composed but haven't 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>	When you delete messages, they're moved to the Trash folder
<b>Personal Folders</b>	The list of the personal folders which corresponds to the created folders in the sever mail box.

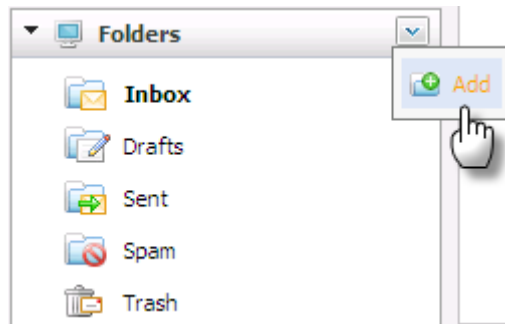
### 5.4.1 Add a new folder

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

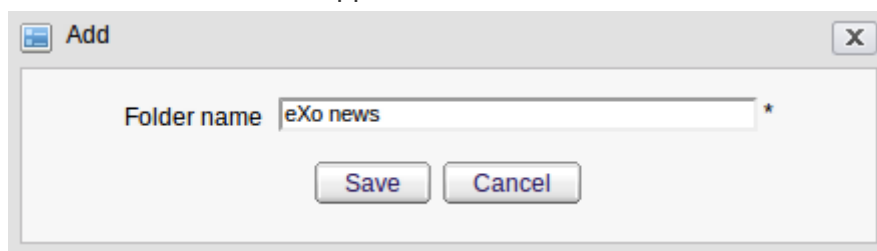
- ✓ **To add a new folder:**

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

bar and then select **Add** in the drop-down list:



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



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

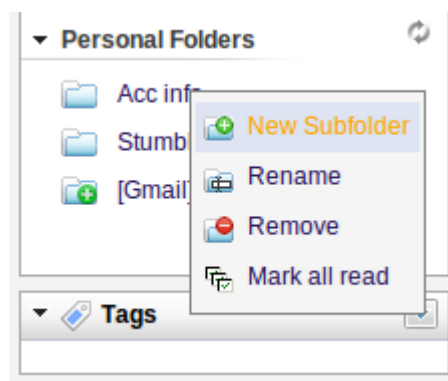


The created folder will be displayed in the Personal Folders section.

You can also 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:**

**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.

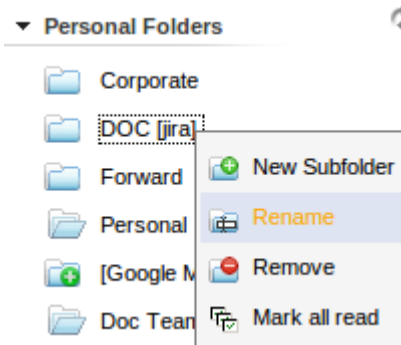
**Step 2:** Type a **Folder name** and click **Save** to finish.

## 5.4.2 Rename a folder

You can change names of all your personal folders which are created by yourself.

✓ **To rename a folder:**

**Step 1:** Right-click the folder which you want to rename and click **Rename** in the pop-up menu:



The **Rename folder** form will appear:

A screenshot of a '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'.

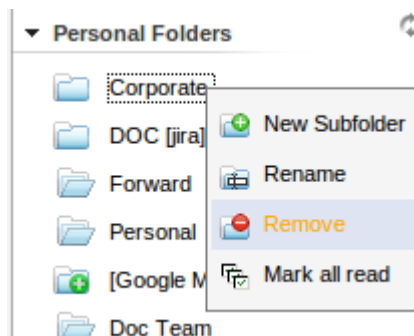
**Step 2:** Enter a new name then click **Save** to finish.

## 5.4.3 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:**

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



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


## 5.5 Message Management

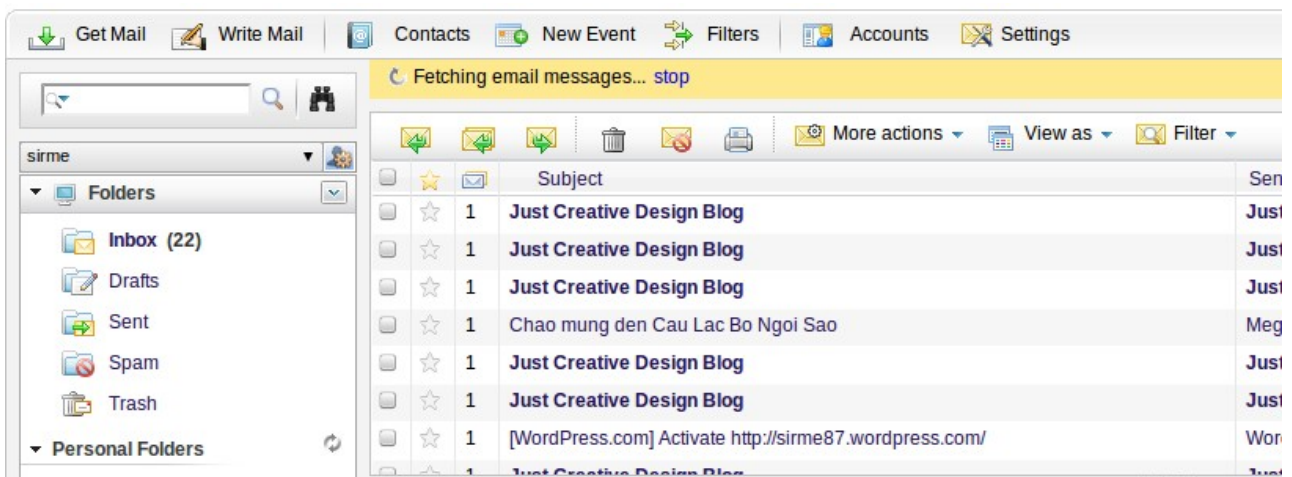
### 5.5.1 Get mails

This function is used to receive messages from the remote mail server and forward it via SMTP, so it can be read in eXo Collaboration Mail. It supports any mail server with POP3, IMAP, SMTP, such as Gmail, Hotmail, Yahoo!Mail, GMX, MS Exchange, and more.

✓ **To get mails:**

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

**Step 2:** Click the button  **Get Mail** on the toolbar. There will be an status notification with the content 'Fetching email messages' displayed. All arrived mails will be shown in the message list pane. Click **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.

### 5.5.2 Compose and send messages

In this section, you will learn how to compose and send a message.

#### 5.5.2.1 Compose and send message

✓ **To start composing a message:**

**Step 1:** Click the button  **Write Mail** on the toolbar.

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

**Compose a new message**

Send Save in Drafts Discard Attach a local file Priority Editor Options

**From :** sirme <sir.me87@gmail.com>

**To :** exo-vn@gmail.com

**Subject :** Introduction of eXo

Dear customers,

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.

**Step 2:** Specify who the message is from by selecting one of your email address.

Send Save in Drafts Discard Attach a local file Priority Editor Options

**From :** John <ng.huutuananh87@gmail.com>

**To :**

**Step 3:** Enter email addresses of main recipients. The **To** box must always contain at least one address; everyone who receives your message can see the addresses in the **To** box.

You can enter one or more email addresses in the **To** box using one of the following ways:

**The 1<sup>st</sup> way:** Type one or more email addresses and separating them with commas.

Send Save in Drafts Discard Attach a local file Priority Editor Options

**From :** John <ng.huutuananh87@gmail.com>

**To :** Fernando Felipe<fernando-felippe@gmail.com>, Mathew Pette<mathew-pette@exoplatform.com>

CC | BCC

When the address you're typing matches one or more addresses in your Address book, the list of matching addresses will appear as a pop-up and you can click to select the address you want:

**To :**

**Subject :**

**The 2<sup>nd</sup> way:** Select one or more contacts from your Address book.

Click the **To** button:

**From :** John <ng.huutuananh87@gmail.com>

**To :**

[CC](#) | [BCC](#)

The **Contacts** window listing all of your contacts will appear:

The Contacts window displays a search bar, a 'Send to all' checkbox, and a dropdown menu for the address book (currently set to 'My Contacts'). Below is a table of contacts:

<input type="checkbox"/> Name	Email
<input type="checkbox"/> Root Root	root@localhost
<input type="checkbox"/> Fernando Felipe	fernando-felippe@gmail.com
<input type="checkbox"/> David Klein	david-klein@gmail.com
<input type="checkbox"/> Mathew Pette	mathew-pette@exoplatform.com
<input type="checkbox"/> Tuan Anh	tuananhnguyen@gmail.com
<input type="checkbox"/> Francis Feye	francis-feye@hotmail.com
<input type="checkbox"/> Franco Jose	franco.jose@gmail.com

Total pages: 1

[Add](#) [Replace](#) [Close](#)

Check the checkboxes of the contact to receive your message. You can search for email addresses in a specific address book by typing the contact name in the search box and select a Address book to search:

The address book dropdown menu is open, showing the following options:

- All contacts
- Personal address books
  - My Contacts** (selected)
  - Collected Addresses
- Public address books
  - administrators
  - users
  - executive-board

Select **Send to all** option also if you would like to send mail to All contacts or specific groups. Click **Add** to add the selected email addresses to **To** box or click **Replace** to replace the current email addresses with the new selected email addresses.

**Step 4:** Enter few words in the **Subject** box to give the recipient(s) the idea of what the message is about.

**Step 5:** Enter your message in the text-input field. You can use this toolbar to format the message text:



**Step 6:** Click  **Send** to send the message when you are satisfied with the content.

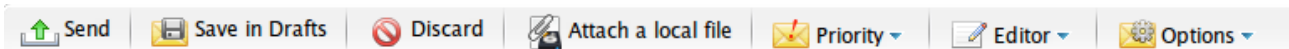


You can use **CC** and **BCC** to send mail to more than one person easily and fast.

- Use the **CC** (carbon copy) box for the addresses of people you want to send a copy of the message to other recipients. Everyone who receives your message can also see the addresses in the **CC** box. If someone responds to your message using "Reply to all", the carbon-copied recipients also receive the message.
- **BCC** (blind carbon copy) mails are private to the sender and the BCC recipients. Use BCC when you want to send message to undisclosed recipients. It means you send message to people and they don't know about other recipients. Addresses listed in the **BCC** box won't receive replies sent to this message.

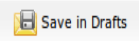
### 5.5.2.2 Other actions

You can take other actions on your composing message like attaching files, saving your message as draft, setting priority level, switching between rich text and plain text, changing the preferences.



Here's how:

#### ✓ Save message as draft:

Click  **Save in Drafts** If you aren't ready to send an email message and want to save it as a draft in your **Drafts** folder for sending later. You can also save a draft, and then send the message keeping a copy in the **Draft** folder.

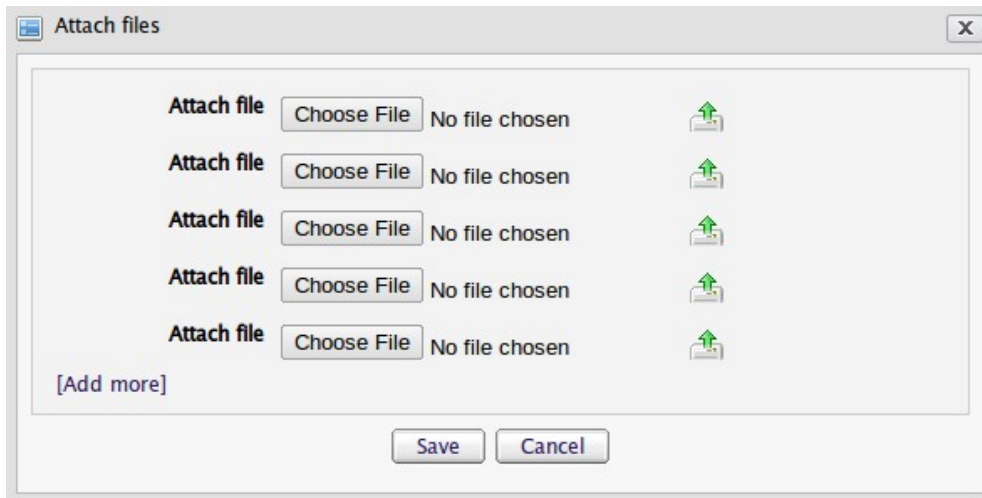
#### ✓ Discard the composed message:

Click  **Discard** to exit the **Compose a new message** window.

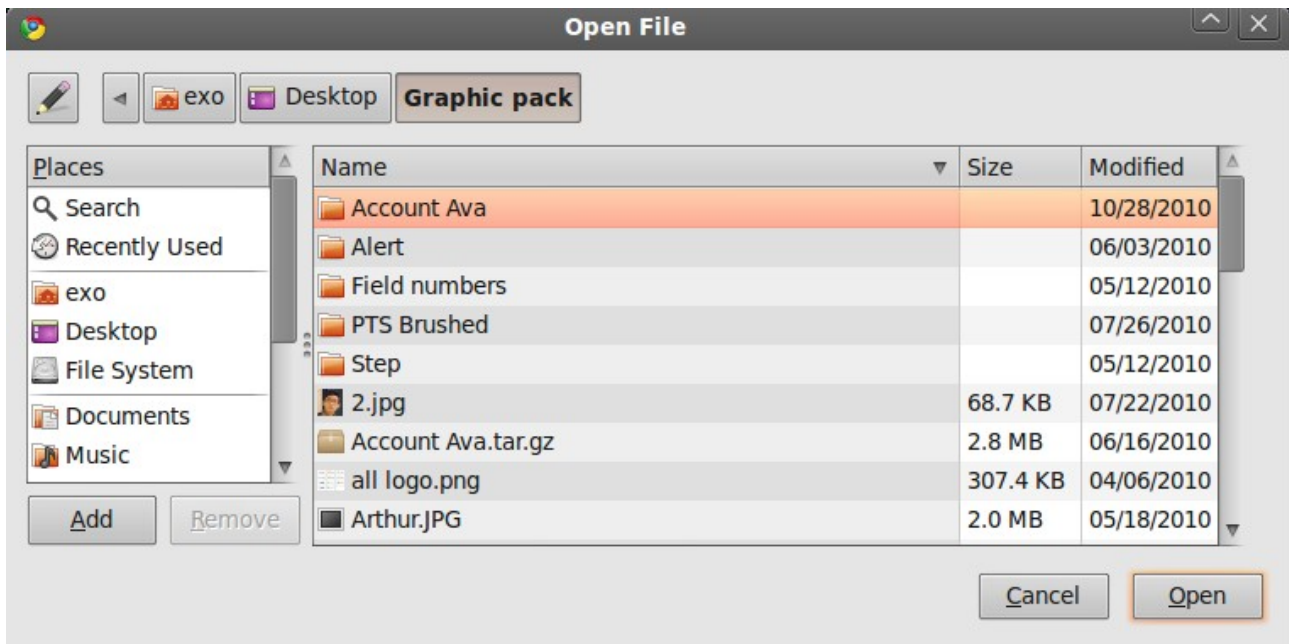
#### ✓ Attach files to message:

Click  **Attach a local file** button, the **Attach files** window will open:






Click **Choose File** button, you will be prompted to select a file on your computer:

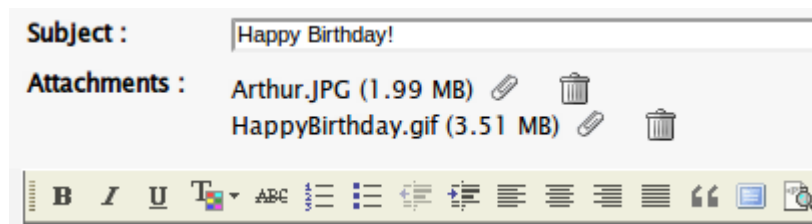



Locate the file you want to attach, select them, and click **Open**.



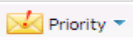
Click  to send the selected file(s). Go back to the **Compose a new message** window, you will see the attached file(s) shown in the **Attachments** area:

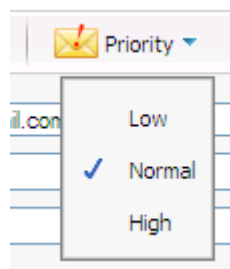




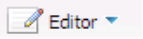
If you decide not to include an attached file before you send the message, just click the trash can icon  next to it to remove the file.

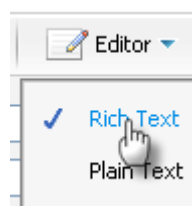
✓ **Set priority for message:**

Click  to set priority level for the composed message. There are 3 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.

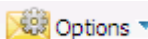


✓ **Switch between rich text and plain text:**

Click  to switch between Rich text and Plain text. With the Rich text selected, the message text can be composed with format tools while with Plain Text selected, the message can be composed with simple text only.



✓ **Change message preferences:**

Click  to set other preferences. 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.



After sending a mail, the sent mail will be saved in the **Sent** folder. 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** application.

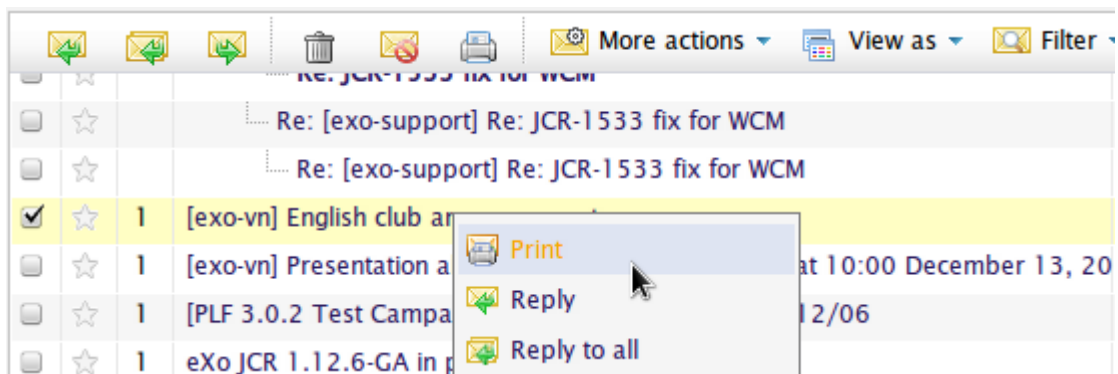
### 5.5.3 Print messages


This function help you take a copy of email message with you, provided that your computer has access to a printer, either directly or through a network connection.

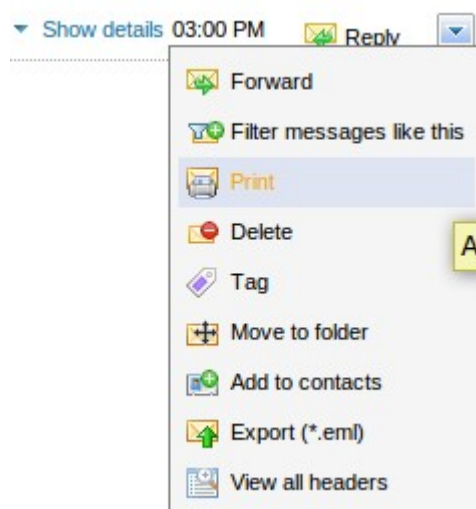
✓ **To print a message:**

**Step 1:** Right-click the message which you want to print and click **Print** in the pop-up menu

or select messages in the message list then click **Print** icon  on the action bar.



Or click the down arrow icon  at the right corner of an open message's content then click **Print** in the drop-down menu:




The Print preview form will be displayed, click **Print** to start printing.

## 5.5.4 Reply to a message

You have two options to reply to a message:

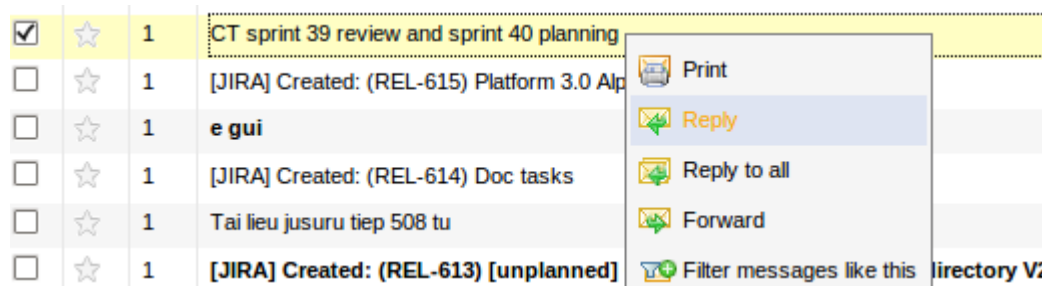
- **Reply** lets you reply to the sender only.
- **Reply to All** lets you reply to the sender and everyone else who received the message.
- ✓ **To reply to a sender:**


**Step 1:** Open the **Reply** form by any of these ways:

**The 1<sup>st</sup> way:** Select the messages in list that you want to answer by selecting their checkboxes, 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 pop-up menu:




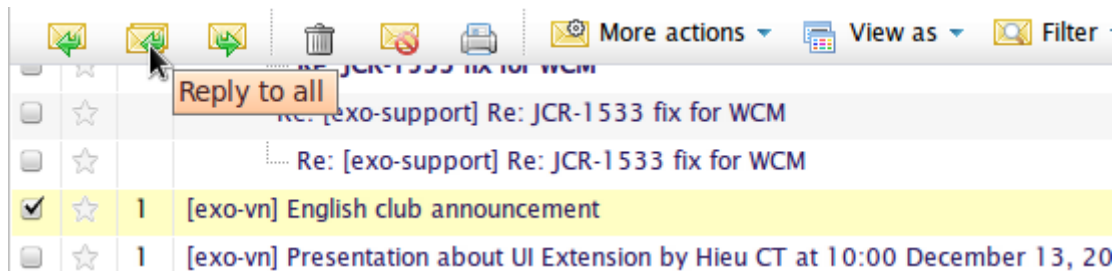
**The 3<sup>rd</sup> way:** Open the message that you want to reply then click  [Reply](#) in the upper right corner of the message content.

**Step 2:** Compose the message content in the **Compose a new message** window that appears.

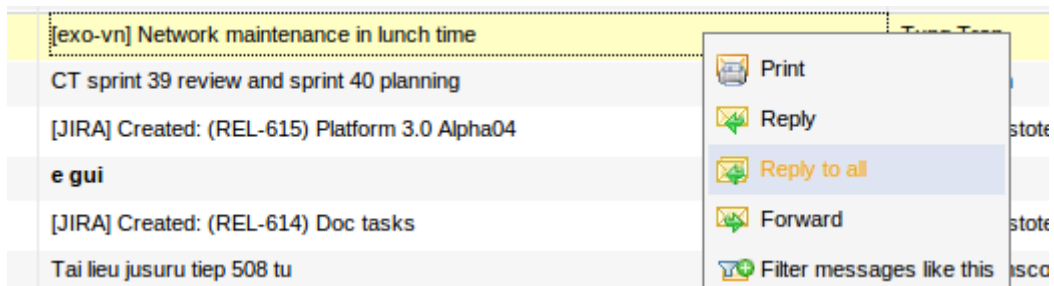
**Step 3:** Click the button  **Send** to send the reply message.

- ✓ **To reply to all:**


**Step 1:** Select the message in the list that you want to reply to all by checking on its checkboxes and click the icon .



or you can right-click the message, then select **Reply to all** in the pop-up menu:




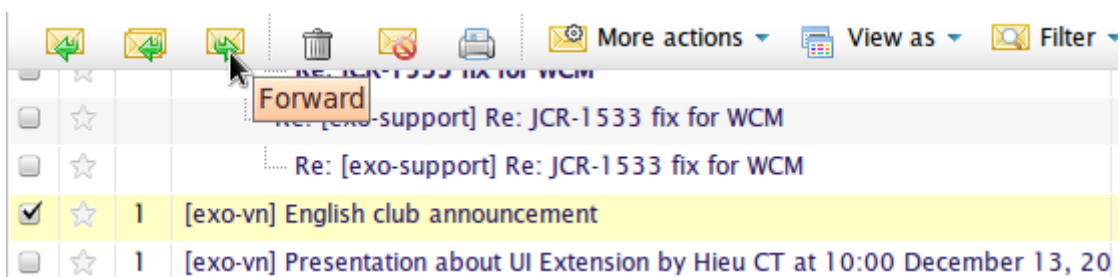
The **Compose a new message** window will appear.


**Step 2:** Compose the message content then click  **Send** to send your reply message.

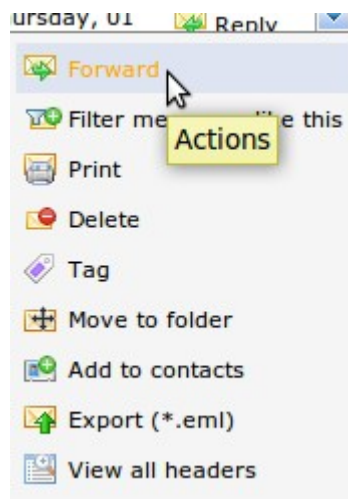
## 5.5.5 Forward messages

The function is used to send your received message to other people.

**Step 1:** Select the message which you want to forward and then click the icon  on the action bar:




or you can open the message which you want to forward, click down arrow button  to show available related actions then click **Forward** in the pop-up menu:



The **Compose a new message** window will be displayed with the original contents of the message you want to forward.

**Step 2:** Enter the address of the recipient that you want to forward to.

**Step 3:** Edit a message if necessary then click  **Send** to forward the message.

### 5.5.6 Move messages to other folders

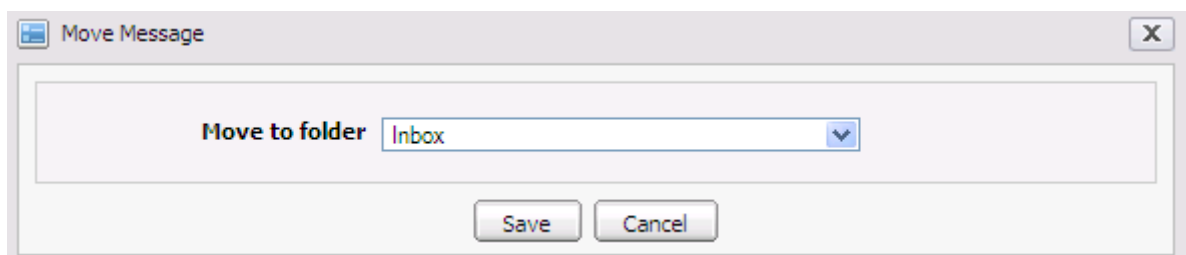
This function is used to move one or more messages to other folders.

✓ **To move messages to another folders:**

**Step 1:** Select messages which you want to move by selecting their checkboxes.

**Step 2:** Right-click these messages and click **Move to folder** in the pop-up menu. The **Move Message** form will appear.

**Step 3:** Select a folder for the destination.



**Step 4:** Click **Save** to move message(s) to the selected folder.


## 5.5.7 Manage tags

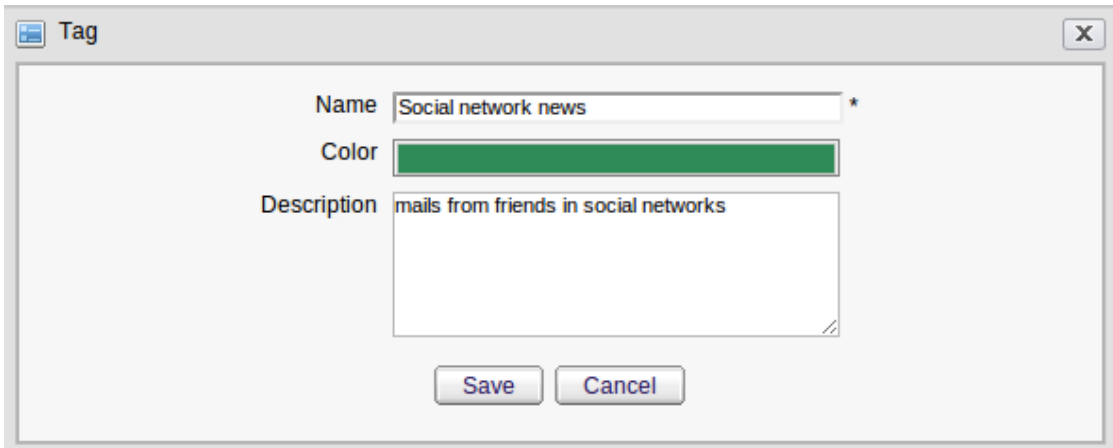
Tags are used as labels which allows filtering or categorizing messages from different folders. They do all the work that folders do and give you an extra bonus: you can add more than one tag to an email message. After you add a tag to messages, you can easily view all the messages that have the same tag(s). A single message could be assigned to many tags. Using tags makes it easy for you to find messages independently from the folder where you stored them.

You can easily create, edit, and delete existing labels. Read below to find out how:

### 5.5.7.1 Tag a message

✓ **To create a new tag:**

**Step 1:** Click  on the Tags bar of right pane and click Add a new tag in the drop-down list. The Tag form will appear:

A screenshot of a 'Tag' dialog box. It has a title bar with a 'Tag' icon and a close button. Inside, there are three fields: 'Name' with the text 'Social network news' and a red asterisk, 'Color' with a green color picker, and 'Description' with the text 'mails from friends in social networks'. At the bottom are 'Save' and 'Cancel' buttons.

Details:

New name	The new tag name. (Required)
Color	The tag color.
Description	The tag brief description.

**Step 2:** Fill in required fields, then click **Save** to finish.

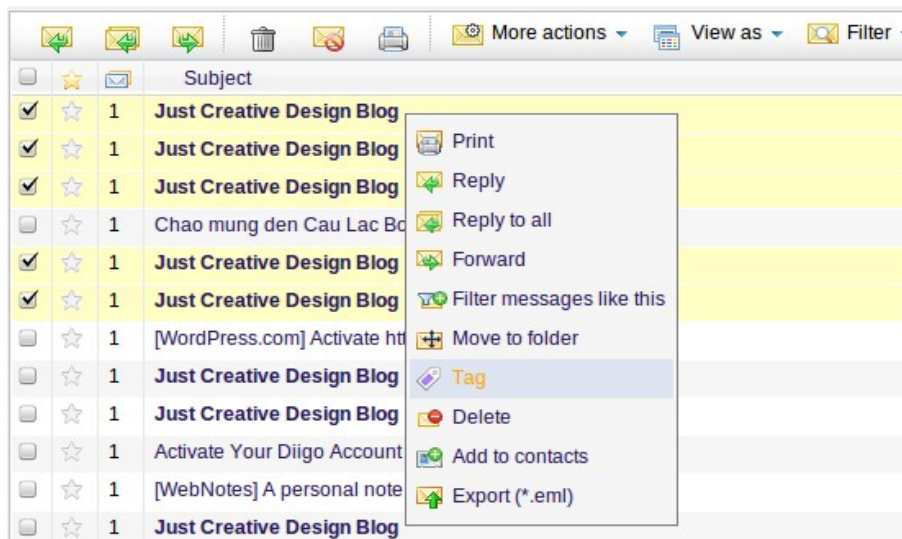
A new tag will be updated at the tag list and now you can start adding this tag to any message.

✓ **To tag a message:**

**Step 1:** Select messages by selecting its checkboxes.

**Step 2:** Right-click one of the selected messages and click **Tag** in the pop-up menu. In other way, you also can click the **More Actions** button the action bar and click **Tag** in the

pop-up menu:



The **Tag Message** form will appear:



Details:

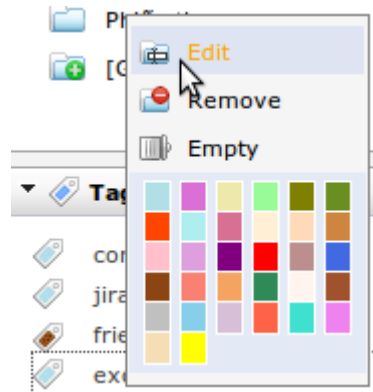
<b>Tag Name</b>	The tag's name. This field contains words and keywords which are used to describe the same messages.
<b>Choose Color</b>	The color of the tag
<b>Add button</b>	To accept adding message to a new tag.
<b>Remove button</b>	To remove tags in case messages were already tagged

**Step 3:** Name the new tag for the selected items or select from existing tags. Click **Add** to add tags to selected items.

### 5.5.7.2 Edit a tag

- ✓ To edit an existing tag:

**Step 1:** Right-click a tag name in the tags list and click **Edit** in the pop-up menu:



The **Edit Tag** form will appear:

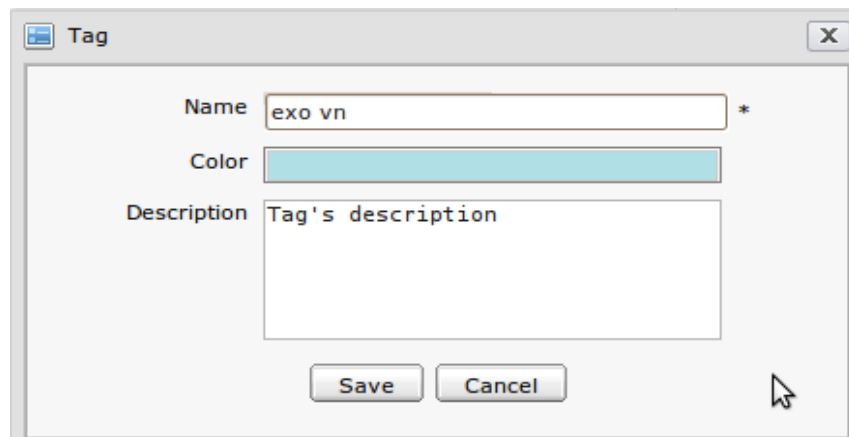


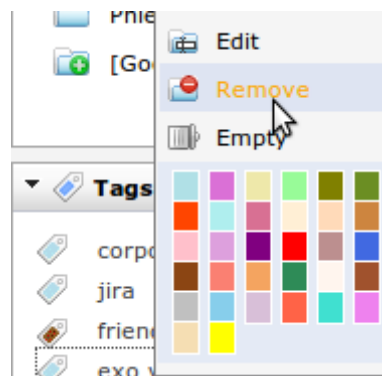
Illustration 56: The Edit tag form

**Step 2:** Make changes on the tag, then click **Save** to save changes.

### 5.5.7.3 Remove a tag

- ✓ To remove a tag:

Right-click the tag that you want to remove from the tags list and then select **Remove** in the drop-down menu:



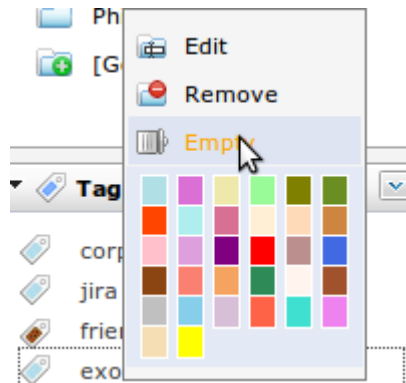


The selected tag will be removed from the tag list and it will also be removed from all messages to which this tag was assigned.

### 3.5.8.4 Empty a tag

This function is to untag all the messages that have the same tag.

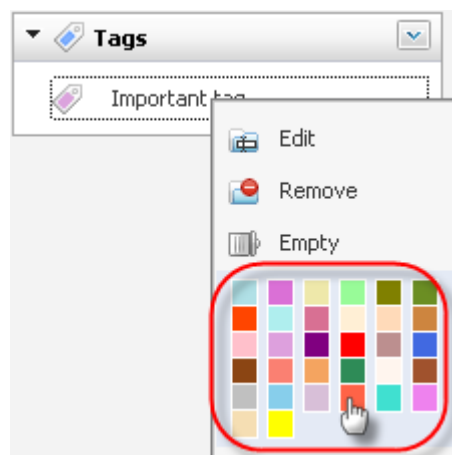
- ✓ To empty a tag:



Right-click a tag that needs to be emptied and click **Empty** in the drop-down menu: The selected tag will be removed from all messages. To check this, click the emptied tag, there will be no message shown in the message list pane.

### 5.5.7.4 Change a 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:



## 5.5.8 Report a message as spam

The function is used to report messages in a specific folder as unwanted messages.

- ✓ **To report an email as spam:**

Select the messages which you want to report as spam, then click  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:**

Select the messages which you want to move from **Spam** folder then click **Not spam** icon on the action bar:



After reporting as 'not spam', all messages from the sender who has been reported as not spam will be moved automatically to its initial folder. Once a message was removed from the **Spam** folder, all the messages from its sender will be received normally.

## 5.5.9 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:**

Right-click the message which you want to delete and select **Delete** in the pop-up menu.

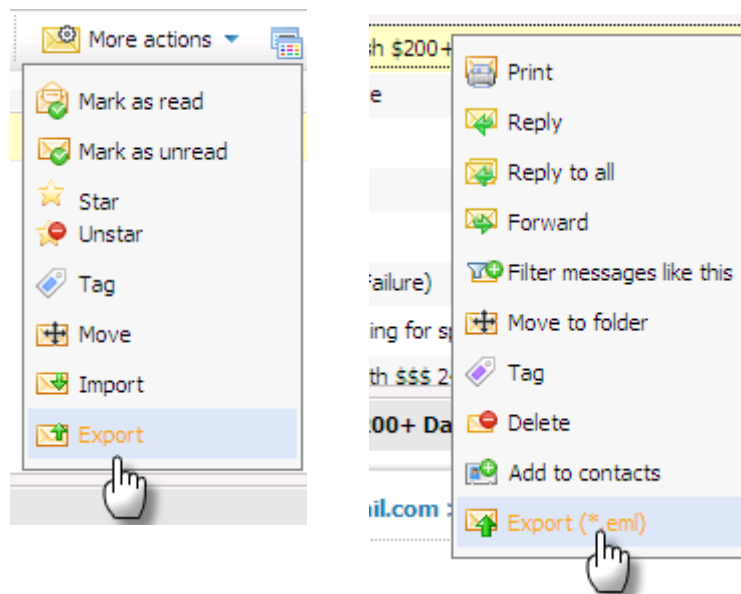
You also can select messages and click the trash icon from the action bar.

## 5.5.10 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 pop-up menu. Check the message to export by selecting its checkboxes and then select the **Export message** item in the **More Actions** pop-up menu:



The **Export Message** form will appear:

The image shows a dialog box titled 'Export Message'. It has a close button (X) in the top right corner. Inside the dialog, there are two main fields: 'File name' and 'Export format'. The 'File name' field contains the text '[exo-vn] Re: 11 AM presentation replanned'. The 'Export format' field is a dropdown menu currently showing '\*.eml'. At the bottom of the dialog, there are two buttons: 'Export' and 'Cancel'.

Illustration 57: The Export Message form

**Step 2:** Enter the file name and select the export format.

**Step 3:** Click the **Export** button to accept the export file.

## 5.5.11 More actions

The section will show you how to take some extra actions related to messages.

### 5.5.11.1 Mark a message as read

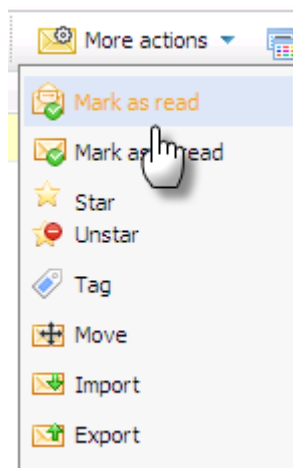
The function allows marking one or more messages as read by removing bold format of message.

✓ **To mark message as read:**

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

**Step 1:** Select messages to mark as read by selecting their checkboxes.

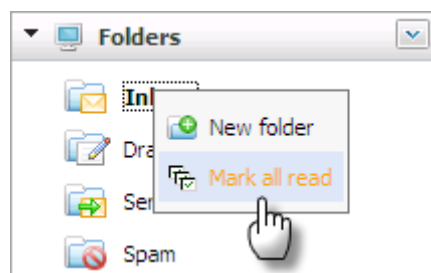
**Step 2:** Click **More Actions**, then click **Mark as read** in the drop-down menu.



**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.



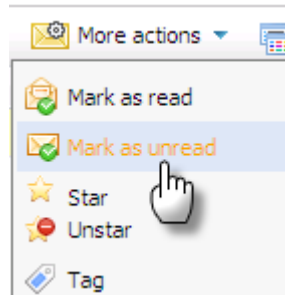
After being marked all as read, all unread messages inside the folder will be marked as read.

### 5.5.11.2 Mark a message as unread

- ✓ To mark a message as unread:

**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:

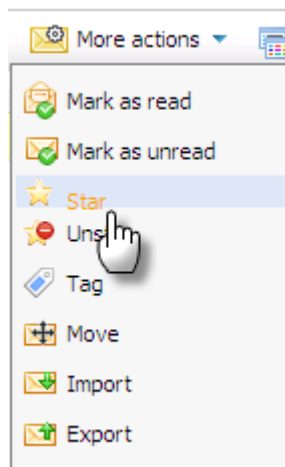


### 5.5.11.3 Star and unstar messages

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:

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



Select messages, then click **Star** from the **More Actions** drop-down menu on the action bar:

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

In the message list pane, 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:

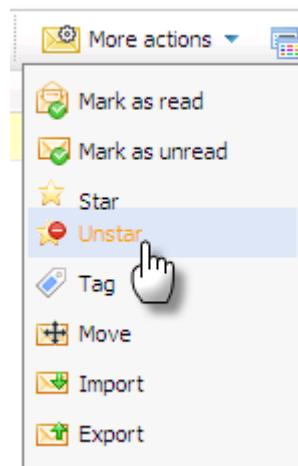
	Nguyen Thanh Cong (JIRA)	[JIRA] Closed: (CS-418) Do not show conversation of mess ( 1 )	Thursday	1.20 I
	Nguyen Thanh Cong (JIR	[JIRA] Closed: (CS-628) Error when view RSS URL a ( 1 )	Thursday	1.11
	Sergey Kabashnyuk (JIR	[JIRA] Resolved: (JCR-391) Anonymous logic ( 1 )	Thursday	1.00
	Luong Trung Hieu (JIRA)	[JIRA] Resolved: (CS-641) Imported file name is shown inv: ( 1 )	Thursday	1.39 I
	Nguyen Thanh Cong (JIRA)	[JIRA] Created: (CS-648) Unknown error in case ticking all ( 5 )	Thursday	798 B
	Nguyen Thanh Cong (JIRA)	[JIRA] Updated: (CS-648) Unknown error in case tickir	Thursday	1.06 I
	Hoang Quang Hung (JIRA)	[JIRA] Work started: (CS-648) Unknown error in case	Thursday	1024
	Hoang Quang Hung (JIRA)	[JIRA] Work stopped: (CS-648) Unknown error in case	Thursday	1024
	Nguyen Thanh Cong (JIRA)	[JIRA] Closed: (CS-648) Unknown error in case ticking	Thursday	1.05 I

Illustration 58: The messages with star view

✓ To remove stars from messages:

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

**Step 1:** Check the starred messages by selecting its checkboxes.



**Step 2:** Select **Unstar** in the **More Actions** menu on the action bar:

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

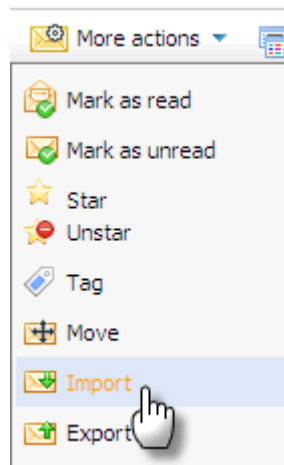
In the message list pane, click the star icon which corresponds to the message that you want to remove star.

### 5.5.11.4 Import messages

The function is used to import messages from your computer to specific folder.

✓ To import messages:

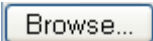

**Step 1:** Select **Import message** in the **More Actions** menu on the action bar:



The **Import Message** form will appear:

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.




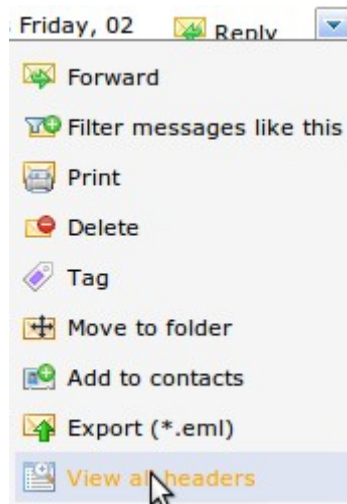
*By default, your imported file must be in the \*.eml format.*

### 5.5.11.5 View full headers of a message

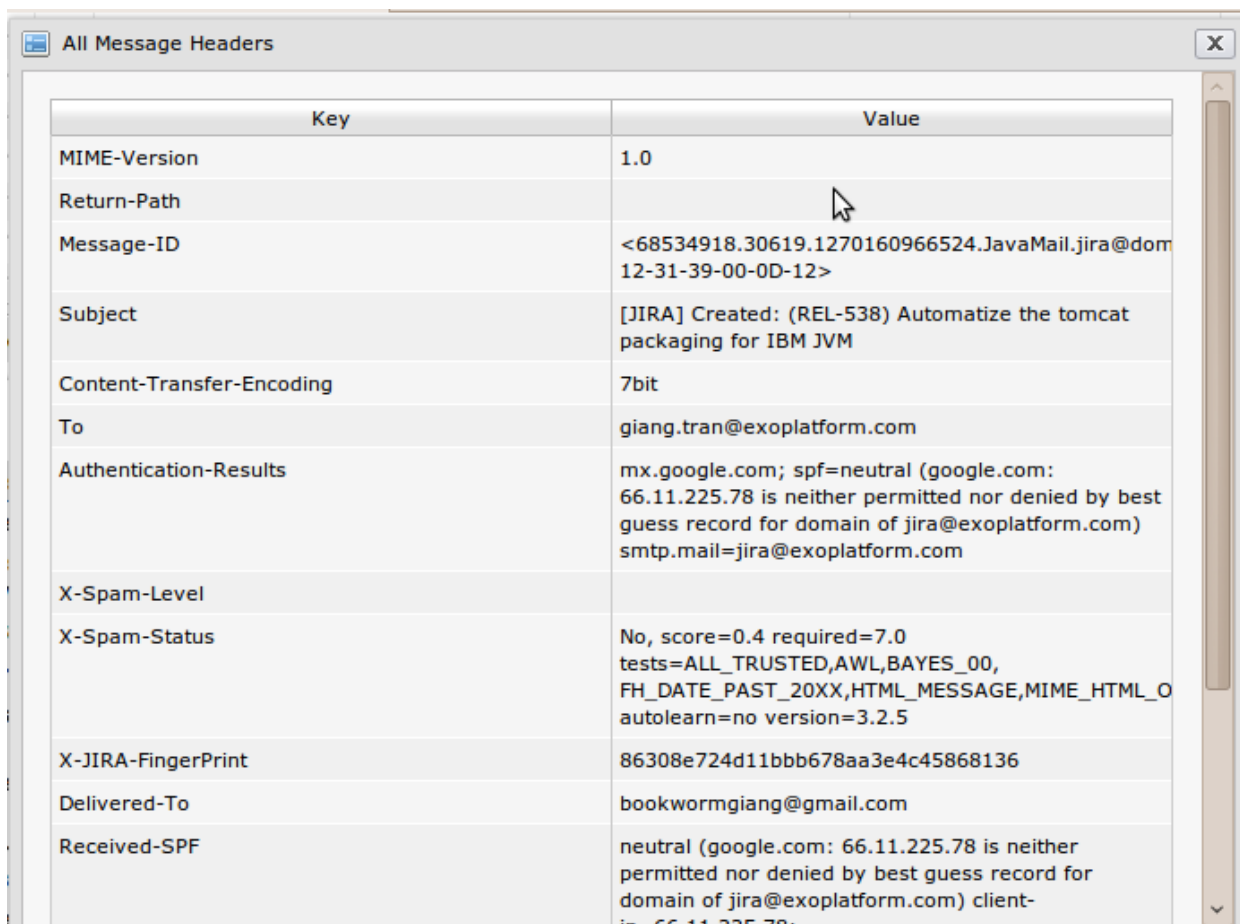
The header's information which is displayed by default, just includes: the sender's email address, the receivers' email addresses and the subject of the mail. If you want to view full headers of a mail, you can do as follows:

**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 a window titled 'All Message Headers'. It contains a table with two columns: 'Key' and 'Value'. The table lists various email headers and their corresponding values.

Key	Value
MIME-Version	1.0
Return-Path	
Message-ID	<68534918.30619.1270160966524.JavaMail.jira@dom12-31-39-00-0D-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-



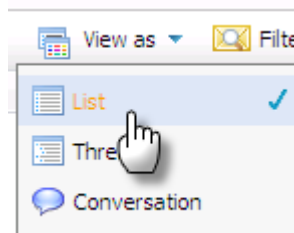
## 5.5.12 View and filter mails

The function is used to view all mails in a specific folder according to some criteria that you want to view.

### 5.5.12.1 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 pop-up menu:



The messages will be arranged in a list:

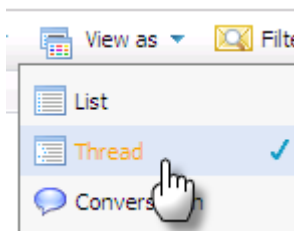
A screenshot of an email interface showing a list of messages. The messages are arranged in a table with columns for checkboxes, stars, subject, sender, time, and size. A red rectangle highlights the first seven rows of the message list.

<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 59: View message as list

#### b) View as Thread

This view arranges conversation as a tree structure. All replies in conversation are shown also. 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:

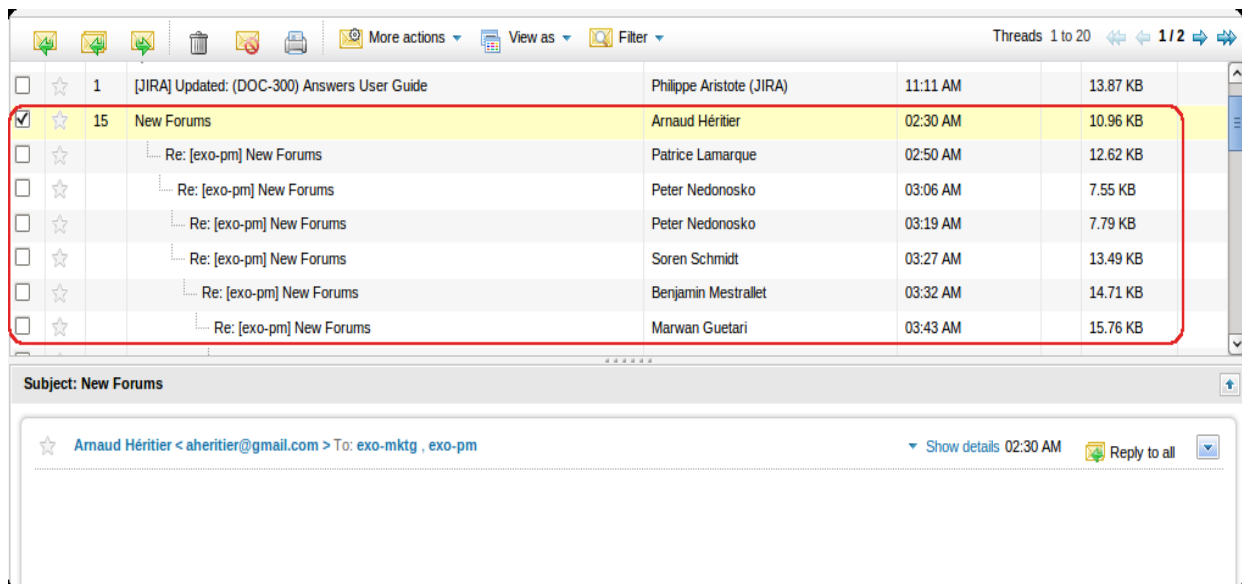
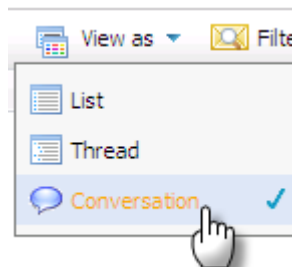


Illustration 60: View message as thread

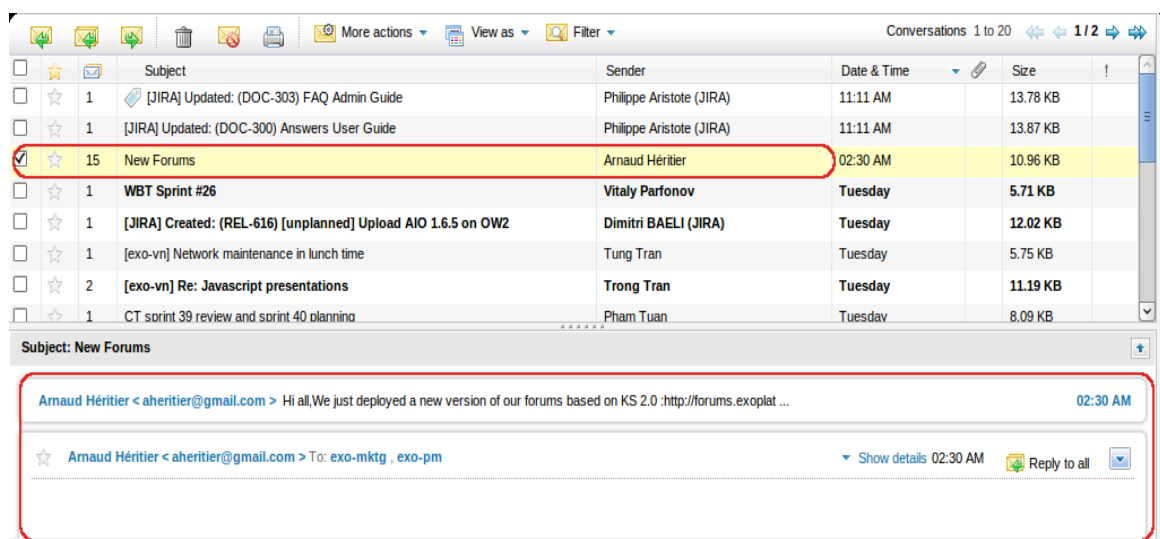
### c) View as Conversation

With this view, the messages which are the replies of one mail will not be displayed in the messages list but on the message pane.

To view messages as conversation, click **View as** and select **Conversation** in the pop-up menu:



The mail and its replies will be displayed:

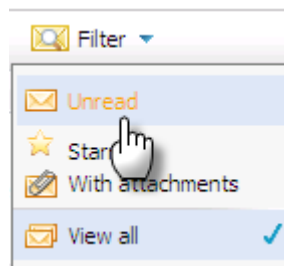


### 5.5.12.2 Filter messages

By default, the message list shows all of your received message in your inbox.

- ✓ **Filter Unread messages**

Click **Filter** and select **Unread** in the drop-down menu, only unread messages will be shown.



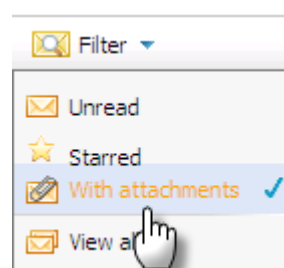
- ✓ **Filter star messages**

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. Simply click **Filter** and select **View all** in the pop-up menu.

## 5.5.13 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 rules. With filters, you don't have to read through content of each message to decide where to put it and then move it there yourself.


### 5.5.13.1 Create a new filter

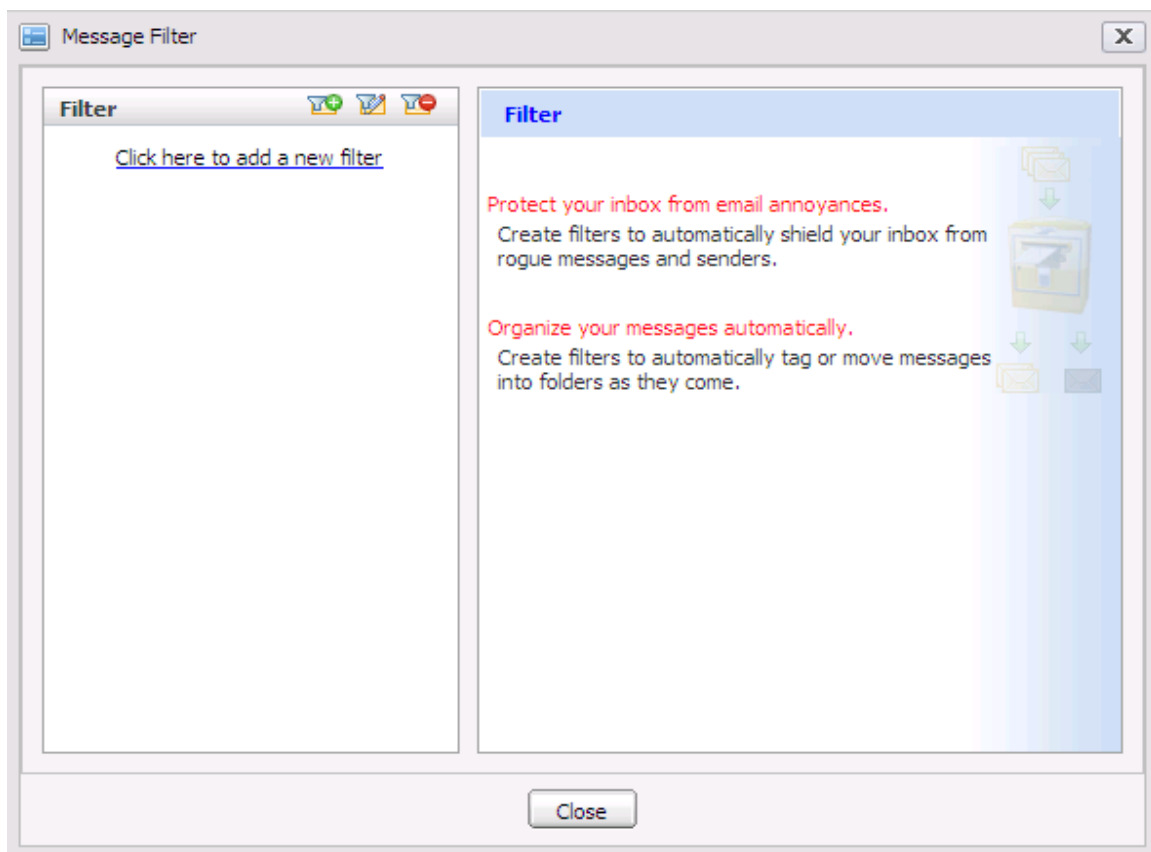
There are 2 methods to create a new filters:

- Create a new filter: All filter rules are defined by yourself.
- Create a new filter from within a message: Use this method when you would like to create a filter for messages similar to one you're currently reading. The filter rules will be based on the existing conditions.

✓ **To create a new filter:**

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:



**Step 2:** Click  or the "Click here to add a new filter" link to create a new filter.

The **Add/Edit Message Filter** will appear:

**Illustration 61: The Add/Edit Message Filter form**

Details:

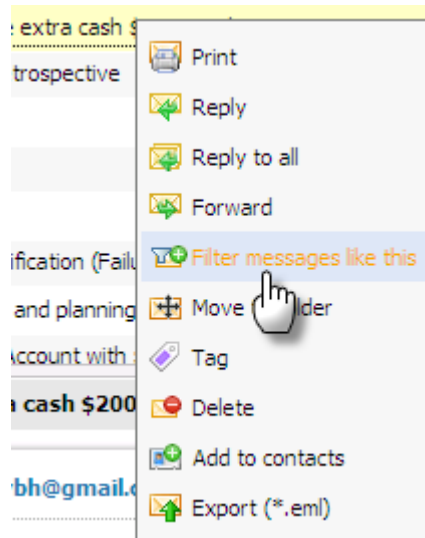
<b>Filter Name</b>	The filter's name. (Required).
<b>From</b>	This condition is to filter the email address of sender.
<b>To</b>	This condition is to filter the mail address of receiver.
<b>Subject</b>	This condition is to filter the subject of incoming messages.
<b>Body</b>	This condition is to filter 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>	All messages meet the filter rules will be applied a tag of your choice.
<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 the rules for new filter.

**Step 4:** Complete adding the message filter by clicking **Save**.

✓ To create a filter within a message:

**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:

**Add/Edit Message Filter**

Filter Name:  \*

**If all of the flowing rules are true ...**

From:

To:

Subject:

Body:

**Then ...**

Move the message to folder :

Apply tag:

Execute now ☐


**Step 2:** Modify the rule if necessary then click **Save** to finish.


The created filter will be displayed in the list. All messages which satisfies with filter rules will be effected.

### 5.5.13.2 Edit a filter

The function is used to make changes on a specific filter.

✓ **To edit a filter:**

**Step 1:** Open **Message Filter** form by clicking  on the toolbar. The **Message Filter** form will appear.

**Step 2:** Select the filter to edit, then click  on the filter bar in the **Message Filter** form. The **Add/Edit Message Filter** form will be shown with current condition.

**Step 3:** Change the filter condition.


**Step 4:** Complete editing by clicking **Save**.

### 5.5.13.3 Delete a filter

The function is used to remove a filter from the filter list.

✓ **To delete a filter:**

**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..

## 5.5.14 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 actions related to the address book management.

### 5.5.14.1 Add a new address book

This function is used to created new address books.

✓ **To add a new address book:**

**Step 1:** Click  **Contacts** on the toolbar to go to the **Contacts** form:

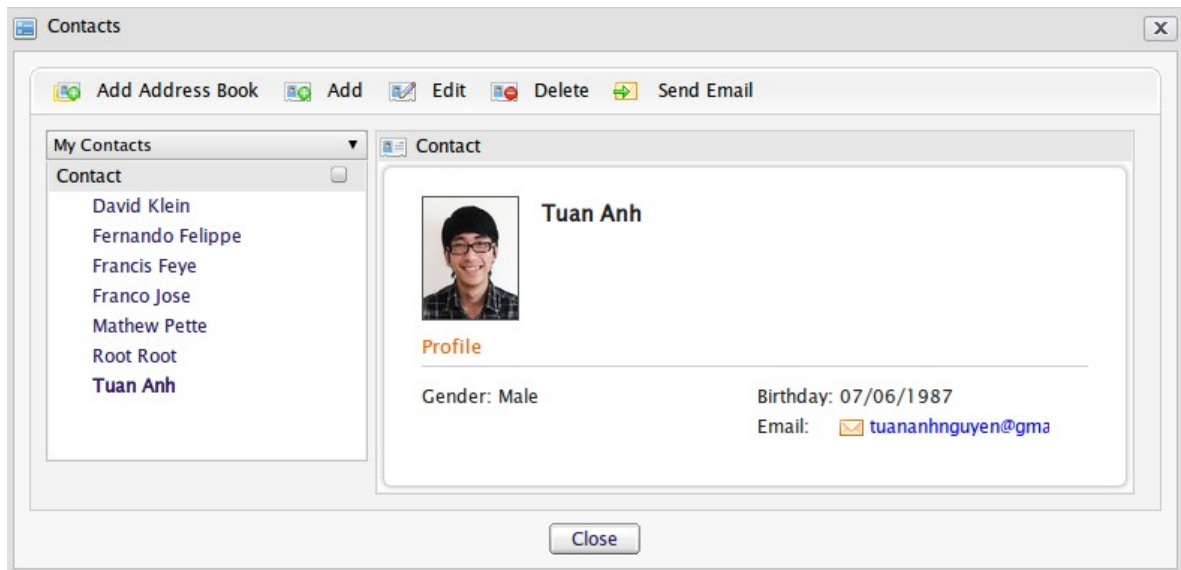


Illustration 62: The Address Book form

**Step 2:** Click the **Add Address Book** button to add a new address book. The **Add Address Book** form will appear:

The 'Add Address Book' window has a title bar with a close button. The main area contains a 'Name' label next to a text input field, and a 'Description' label next to a larger text area. At the bottom are 'Add' and 'Cancel' buttons.

Illustration 63: The Add Address Book form

Details:

Group name	The name of the Address Book. (Required).
Description	The group description.

**Step 3:** Enter the name and description of new forum then click **Add** to finish.



### 5.5.14.2 Add a new contact

The function is used to add a new contact to a group.

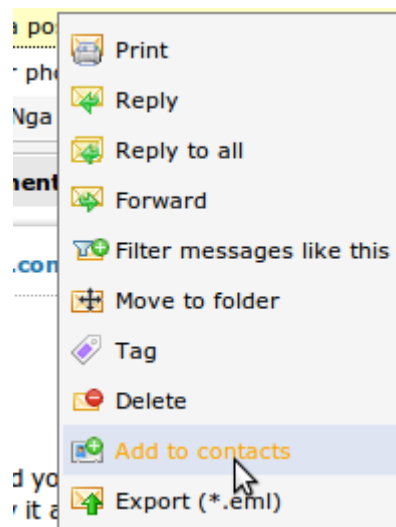
✓ **To add a contact:**

**Step 1:** Open the Add new Contact form.


**The 1<sup>st</sup> way:** Click the button  **Add** on the **Contacts** form.

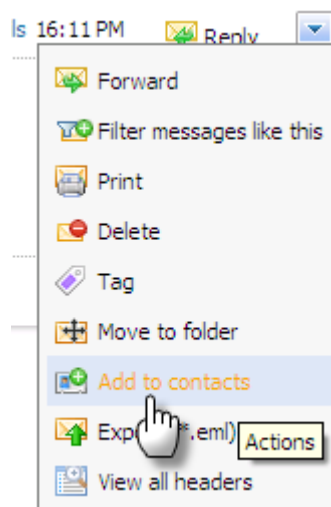
**The 2<sup>nd</sup> way:** This way is used to add the sender of a message to a specific group.

Right-click a message to add the sender to contacts list and then click **Add to contacts**.

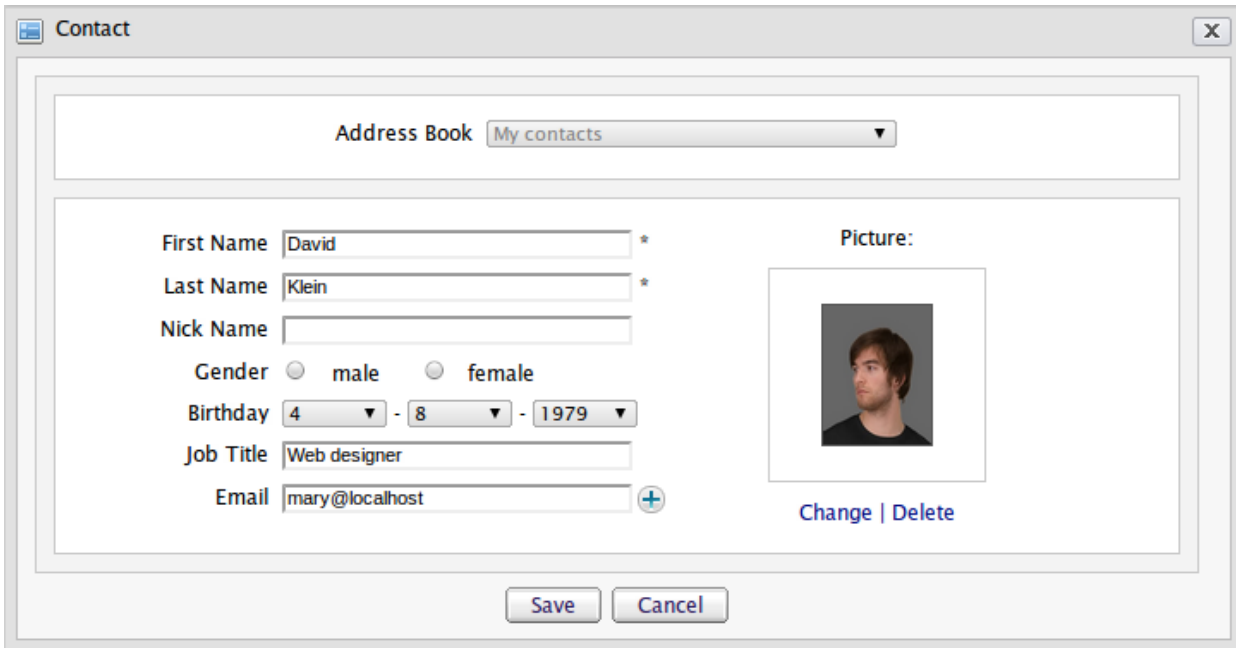


**The 3<sup>rd</sup> way:** Use this way to add a message sender to a specific group.

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:



**Step 2:** Enter contact details.

**Step 3:** Complete adding new contacts by clicking the **Save** button.


#### 5.5.14.3 Edit a contact details

The function is used to edit a contact in a specific group.

✓ **To edit a contact:**

**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 .

**Step 4:** Change the contact details then click **Save** to finish.


#### 5.5.14.4 Delete a contact

The function is used to delete a contact from a specific group.

✓ **To delete a contact:**

**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.

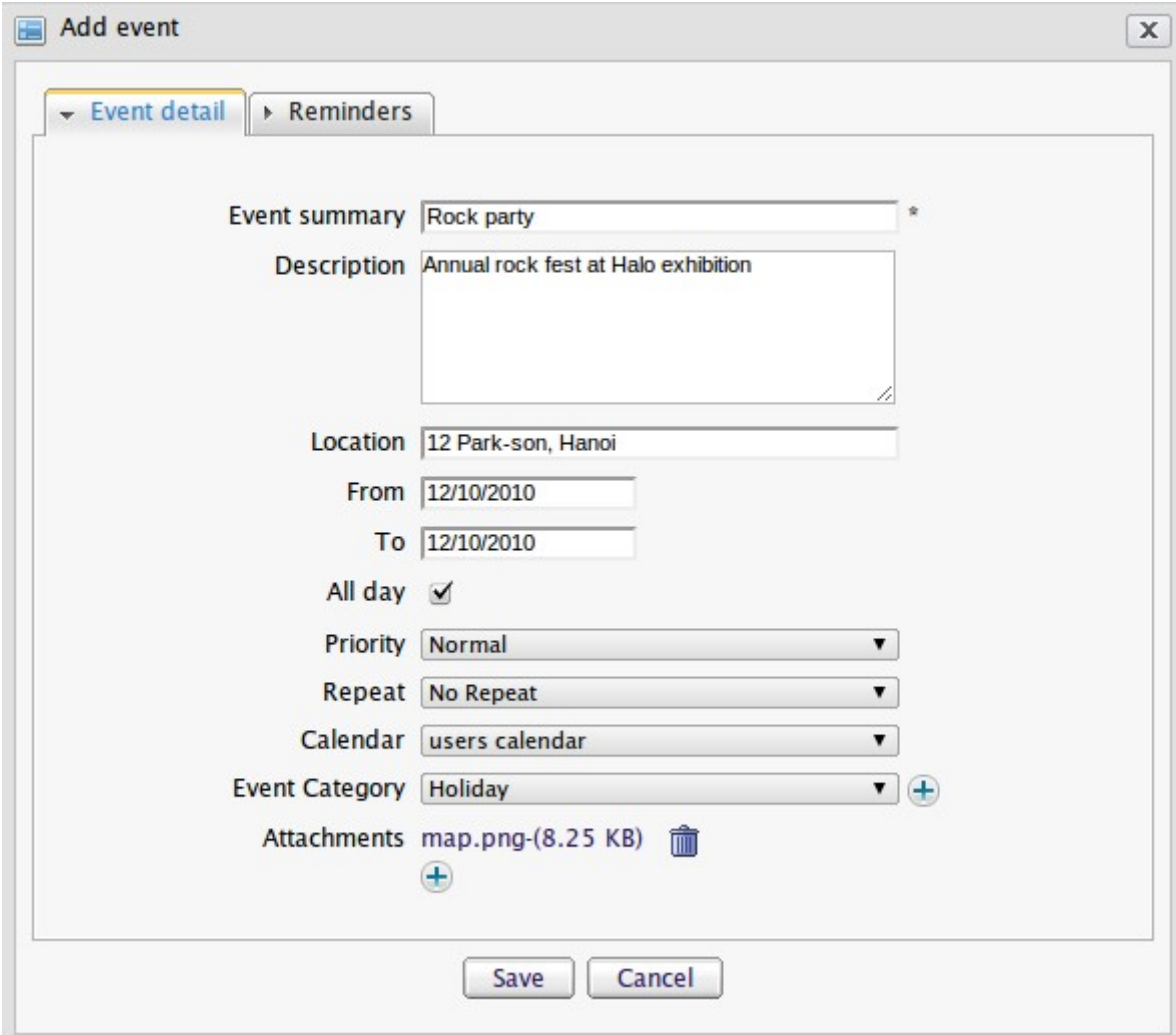
## 5.5.15 Add an event

The function allows you to quickly add new events into your calendar instead of going to Calendar application.

- ✓ To add an event:

**Step 1:** Open the **Add event** form by clicking the button  **New Event** on the main toolbar.

The **Add event** form will appear:



The screenshot shows the 'Add event' dialog box with the following details:

- Event summary:** Rock party
- Description:** Annual rock fest at Halo exhibition
- Location:** 12 Park-son, Hanoi
- From:** 12/10/2010
- To:** 12/10/2010
- All day:** ☒
- Priority:** Normal
- Repeat:** No Repeat
- Calendar:** users calendar
- Event Category:** Holiday
- Attachments:** map.png-(8.25 KB)

Details:

The **Event Detail** tab contains basic event information. You can set the priority for event, create repeating event, attach file to event, and more. For more details, you can refer to [3.5.1 Add a new event](#).

The **Reminders** tab:

The reminder function allows you to remind about an event via a mail.

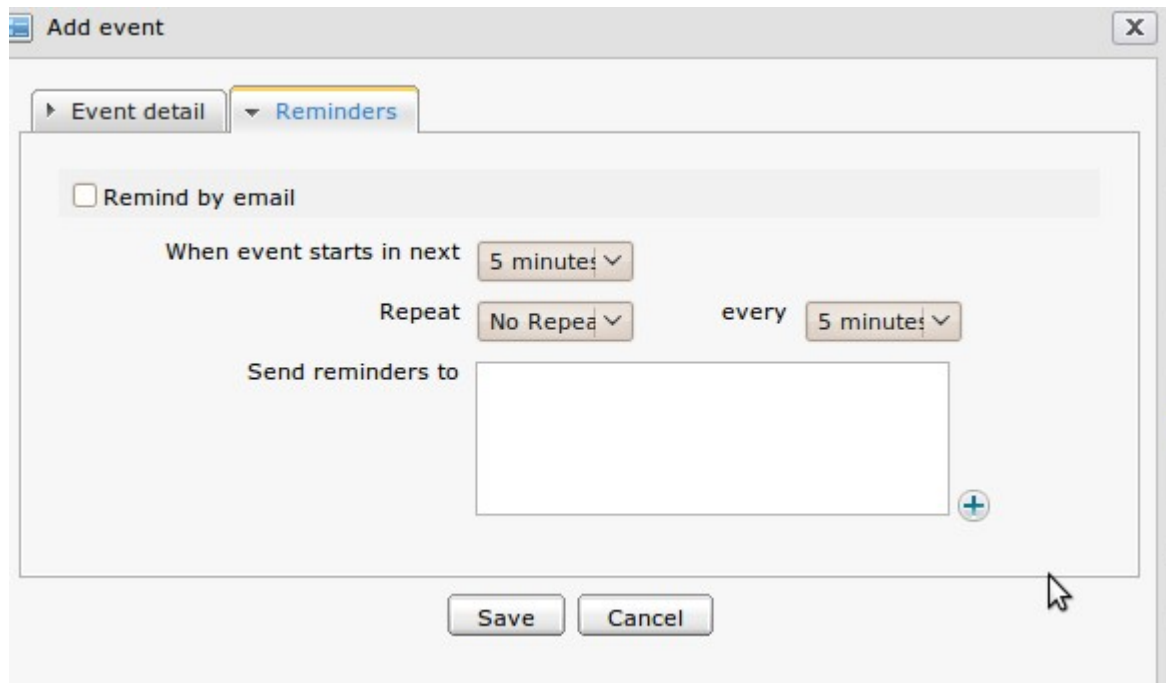
The screenshot shows a web-based 'Add event' dialog box. It has a title bar with a close button (X). Inside, there are two tabs: 'Event detail' and 'Reminders', with 'Reminders' being the active tab. Under the 'Reminders' tab, there is a checkbox labeled 'Remind by email'. Below this, there are three rows of settings: 'When event starts in next' with a dropdown menu showing '5 minutes'; 'Repeat' with a dropdown menu showing 'No Repeat'; and 'every' with a dropdown menu showing '5 minutes'. Below these settings is a text input field labeled 'Send reminders to'. To the right of this field is a small blue circular button with a white plus sign. At the bottom of the dialog box are two buttons: 'Save' and 'Cancel'. A mouse cursor is visible near the bottom right corner of the dialog box.

Illustration 64: The Reminders tab of Add event form

For more details refer to [3.5.1.2 Add detailed event](#)

**Step 2:** Fill in the Add event form.

**Step 3:** Complete adding new event by clicking **Save**.

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 like below:



Illustration 65: The content of an Invitation mail

There are 3 options:

- **Yes and Import:** Accept attending in the event in the Invitation mail. The event will be imported into your calendar to remind you about this event. The event will locate **Default** calendar in the eXo Collaboration Calendar.
- **Yes:** Accept attending in the event without importing it into your calendar.
- **No:** Refuse attending in the event.

## 5.5.16 Search messages

If you would like to find email that isn't directly related to the message you're reading, you can use the search feature. There are two types of searching: **Quick search** and **Advanced search**.



### 5.5.16.1 Quick Search

Quick search allows you to conduct a search with specific keywords in all of your messages. All messages from the different folders that match with your search term will be displayed. To do a quick search, do as follows:

**Step 1:** Enter a search term into the Search field:



**Step 2:** Click  .

All messages containing the search term will be listed in the search results.

<input type="checkbox"/>	★	Subject	Sender	Date & Time	Size	!
<input type="checkbox"/>	★	[Inbox] Nexus: Staging Completed.	Nexus Repository Ma	Wednesday	48.72 KB	
<input type="checkbox"/>	★	[Inbox] Nexus: Staging Repository Dropped.	Nexus Repository Ma	Thursday	6.00 KB	
<input type="checkbox"/>	★	[Inbox] Nexus: Staging Completed.	Nexus Repository Ma	Thursday	6.68 KB	
<input type="checkbox"/>	★	[Inbox] Nexus: Staging Completed.	Nexus Repository Ma	Wednesday	79.58 KB	
<input type="checkbox"/>	★	[Inbox] Nexus: Promotion Completed.	Nexus Repository Ma	Wednesday	71.49 KB	




- The Spam and Trash folders will not be searched.
- The messages in Spam and Trash folders can be searched by positioning explicitly into them.

### 5.5.16.2 Advanced Search

The Advanced Search allows you to specify search criteria to narrow your search results.

✓ **To do an advanced search:**

**Step 1:** Click the icon  to the right of the search box.

The **Advanced search** form will appear:

In this form, you can define the search criteria.  
Details:

Search in folder	
From	<p>The condition corresponding to the sender's name or mail address. 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 searched messages were receipted</p> <ul style="list-style-type: none"> <li>- Has Star: Search messages with star.</li> <li>- Has attachment: Searching messages that have attachment.</li> <li>- Priority: The priority of the search messages.</li> </ul>

**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.

## 5.5.17 Mail Settings

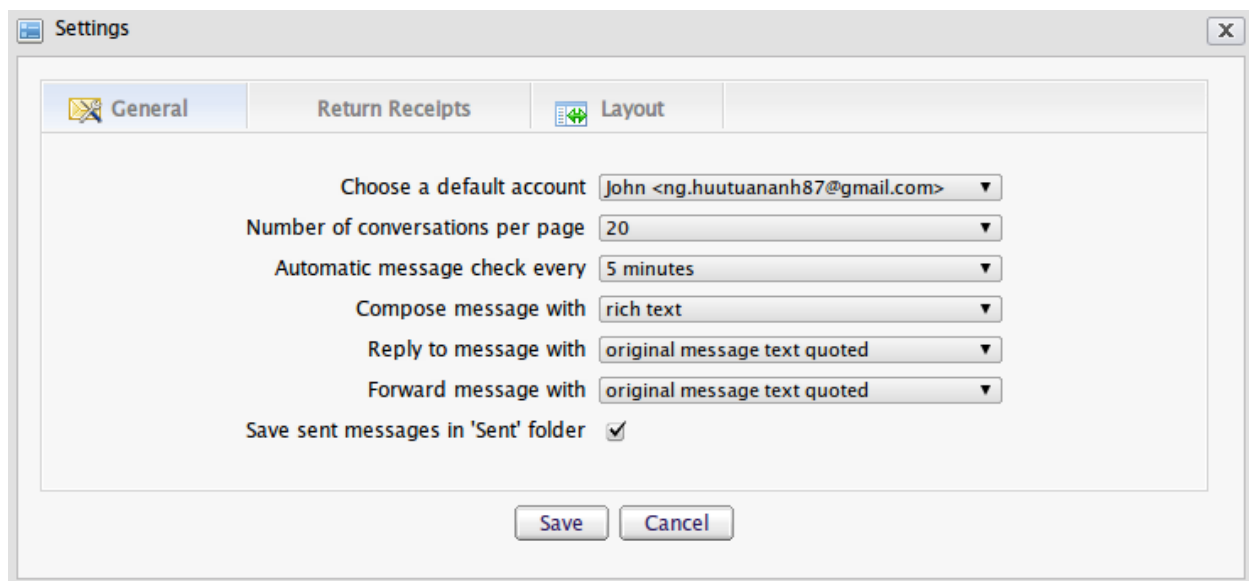
The function allows you to customize the behavior as well as layout of Mail to suite your own needs.

- ✓ **To change the mail settings:**

**Step 1:** Click  **Settings** on the toolbar.

The **Mail Settings** form appears with 3 tabs: General, Return Receipts and Layout.

The **General** tab contains basic setting information:



Details:

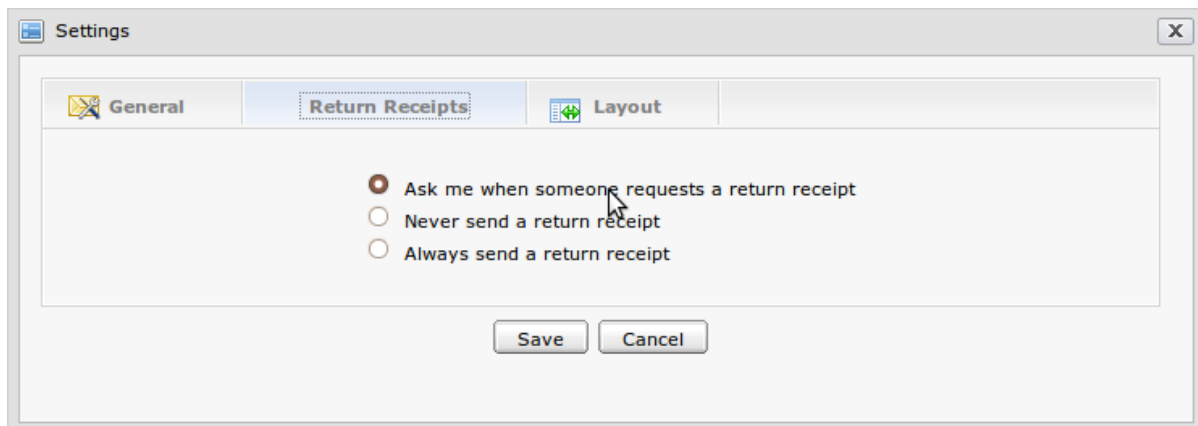
<b>Choose a default account</b>	Set the default account if you use multiple accounts.
<b>Number of conversations per page</b>	The number of conversations which will be displayed per page. The options including 10, 20, 30, or 70 messages per page in message list pane.
<b>Automatic message check every</b>	The time interval that the system will check mail automatically. 5 minutes, 10 minutes, 20 minutes, 30 minutes or 1 hour.
<b>Compose message with</b>	The default text editor of the message used when composing a message
<b>Reply to message with</b>	There are two options. - Reply message with attachment. - Reply message with texts only.
<b>Forward message with</b>	There are two options:



	<ul style="list-style-type: none"><li>- Forward message with attachment.</li><li>- Forward message with text only..</li></ul>
<b>Save sent messages in 'Sent' Folder</b>	This 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 automatically send a notification to the sender or not to inform that you have read the message.



**Illustration 66: 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 notification 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**.

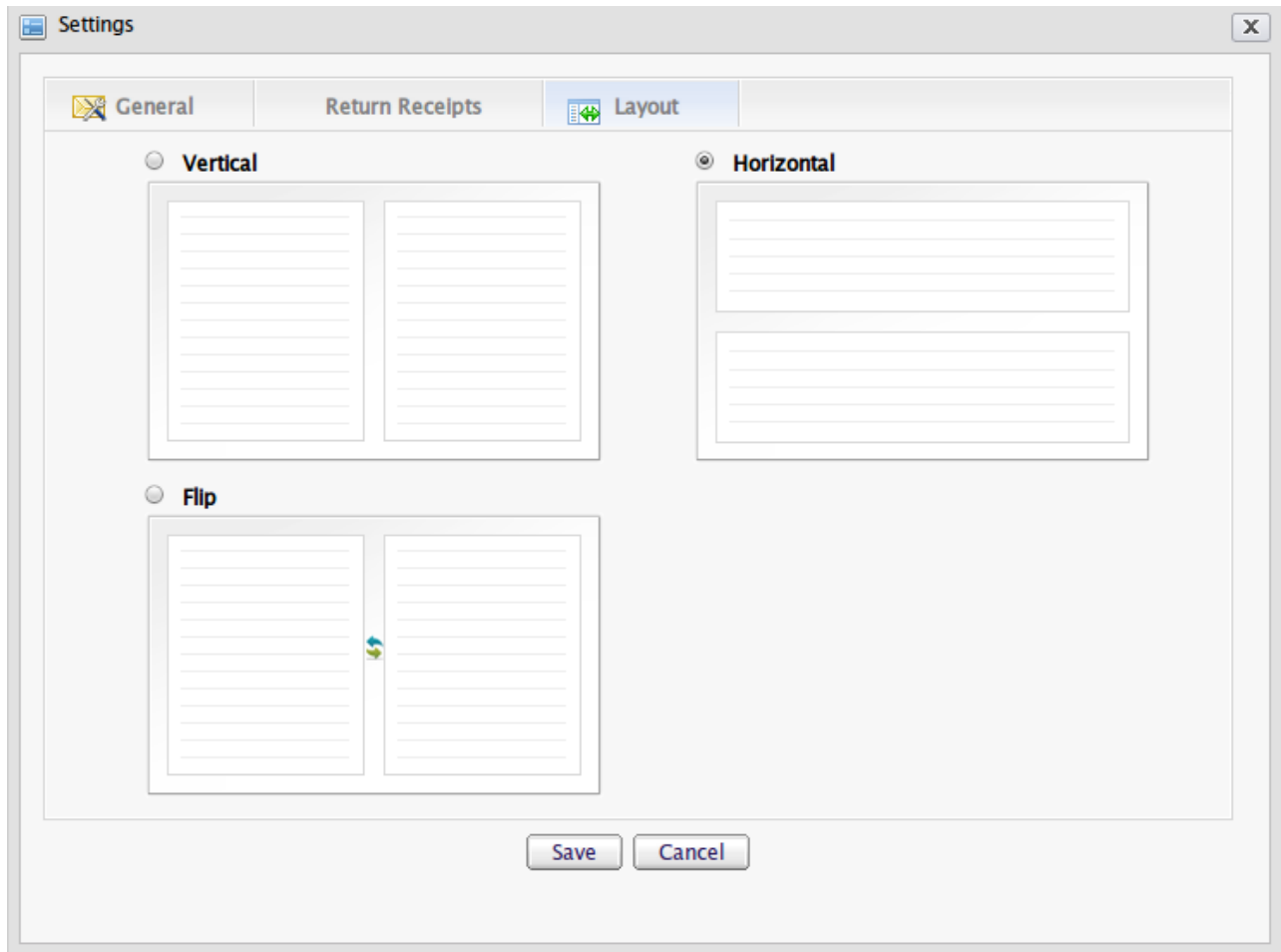


Illustration 67: The Layout tab of the Mail Settings form

**Step 2:** Change the settings.

**Step 3:** Click **Save** 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. Now, you can take advantage of all features in Collaboration to support and enhance your collaborative work.

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 as well as 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 [Forum](#) where you will find very useful information and discussion about eXo products.