Zimbra 8 Web Client User Guide

This is a consolidated guide referencing specific sections of the full VMware Zimbra user guide, which can be found at: http://www.zimbra.com/community/end_user_guide_and_how_to.html

This guide is intended to help transition existing Schafer employees and new Schafer employees as they begin using Zimbra as their primary email system.

Revision 2 – Created 4/26/2013

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What is Zimbra?

Zimbra is an integrated email, calendar, and address book system. Zimbra was chosen as the primary server-side email system for all Schafer email domains. Schafer employees will be able to access their company email from a single location by using Zimbra.

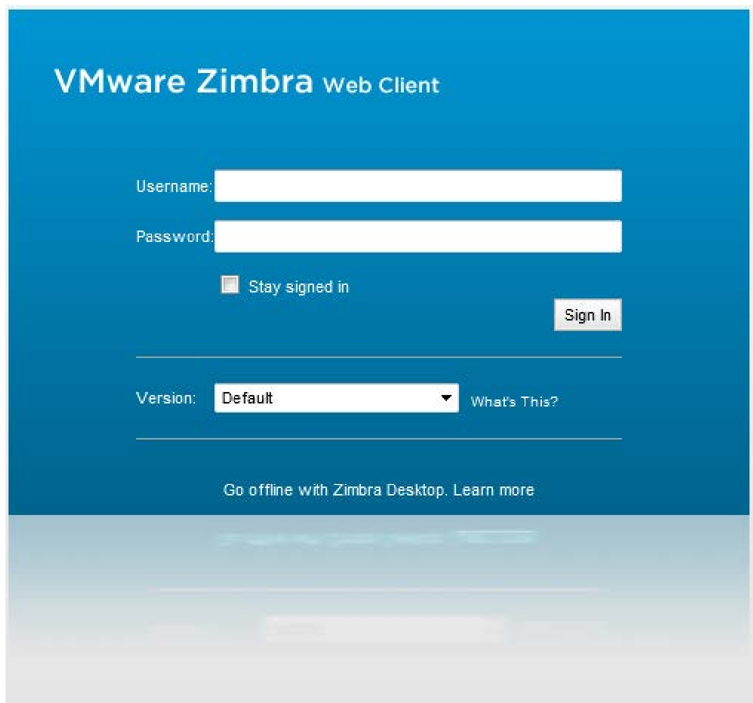
Logging into the Zimbra Web Client (ZWC)

The URL to access Zimbra is https://zimbra.asolutions.com.

Users can log into the resource using their email address and SCHAFER.LAN Active Directory Password.

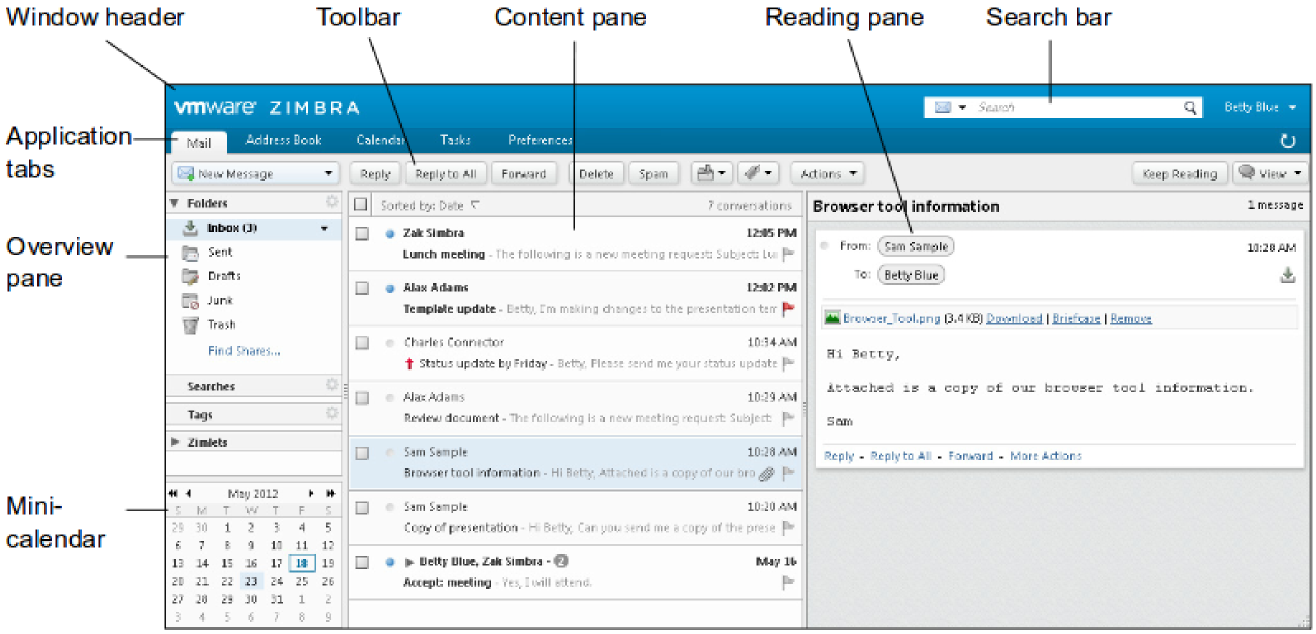
The ZWC has three versions, but will default to the type selected in Sign in Options under **Preferences > General**:

- The Advanced (Ajax) version offers the full set of Web collaboration features and is the default setting. It works with most current browsers and faster Internet connections.
- If you have a slower Internet connection or prefer HTML-based messaging, you can use the Standard (HTML) version, which has many of the same features.
- A Mobile version can be used when accessing the site from mobile devices such as iPhone, Android, or other portable platforms.



Navigating the Zimbra Web Client

After sign-in, you will see a screen view similar to the one below. This view is called the **Mail** view. The view changes when you click a tab to use another application, such as **Address Book** or **Calendar**.



Window header - The Window header displays:

- Search bar – allows searching all items in the account for matches.
- User name for the logged in account - from this drop-down menu you can access:
  - Product Help
  - Help Central Online
  - New Features
  - About
  - Sign Out

Application tabs - The applications you can access are listed in the tabs on this row:

- **Mail**
- **Address Book**
- **Calendar**
- **Tasks**
- **Preferences**

Overview pane - The Overview pane contains the following:

- **Folders** – includes system folders (Inbox, Sent, Draft, Junk and Trash) as well as custom folders you can create with a right-click when pointing to a specific folder
- **Searches** – search queries can be created and saved for future use here
- **Tags** – any tags you have created. Click on a tag to quickly see all messages that are tagged with that tag.
- **Zimlets** – links that may have been created to integrate with third-party applications from within your mailbox.

When in the **Calendar** application view, the Overview pane displays your calendar list, Searches, Tags and Zimlets.

Mini-calendar – The mini-calendar is optional. If desired, this view can be disabled in the **Preferences > Calendar** page.

Toolbar - The toolbar shows actions available for the application tab currently in use.

Content pane - The Content pane area changes depending on the application tab in use. In the Inbox view, it displays all messages or conversations in your Inbox.

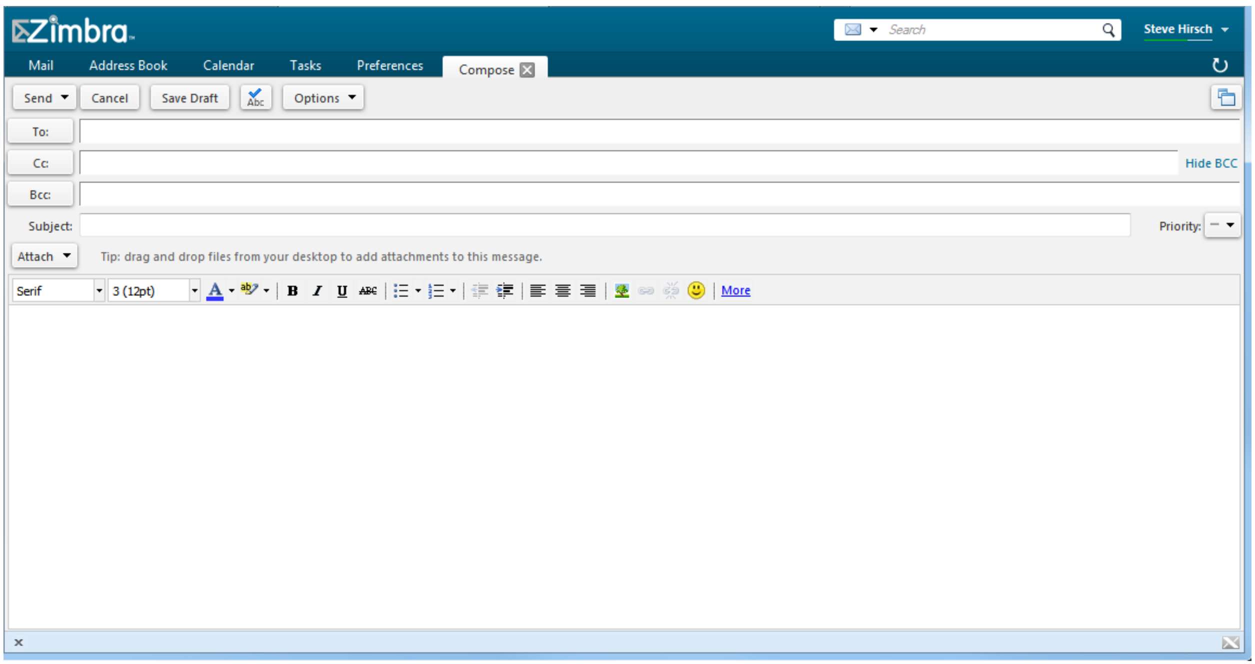
Reading pane – Selected email messages are displayed in the Reading pane.

Search bar - Search options, including the Advanced Search feature, are displayed in this area. You can also save searches from here

Composing a New Email Message

Depending on your mail preferences, when you click **New Message** , either a Compose tab appears in the Application Toolbar, or the Compose page will open in a separate window.

In the Mail tab click **New Message**. Depending on your email preferences, the blank compose page opens in a new tab or opens as a separate compose window.



1. In the **To:** text box, enter the email address of the person or persons to whom you are sending the message. Either type the address or click **To** in order to search through your contacts or the global address list.
   ****Note:** You can drag and drop address bubbles in the text box to the Cc or BCC text boxes, and you can copy address bubbles by clicking CTRL+c when they are highlighted.***
2. If you have more than one email identity (also known as a persona) configured, **From:** is displayed above the **To:** field. Select the identity to use for this email.
3. (Optional) In **Options**, click **Signatures** and select the signature you want added to the message.
4. (Optional) To send a copy of the email to other recipients (Cc) or to send a blind copy (BCC) without the recipient's knowledge, enter email addresses in the **Cc** and **Bcc** fields.
   ****Note:** You can send a message without an address in the **To:** field if there is an address in either the **Cc** or **Bcc** field.***
5. In the **Subject:** field, tell the recipient what the message is about.
6. Click **Send** (or press **Ctrl + Enter**) to send the email message. A copy of the message you sent will be saved in your **Sent** folder.

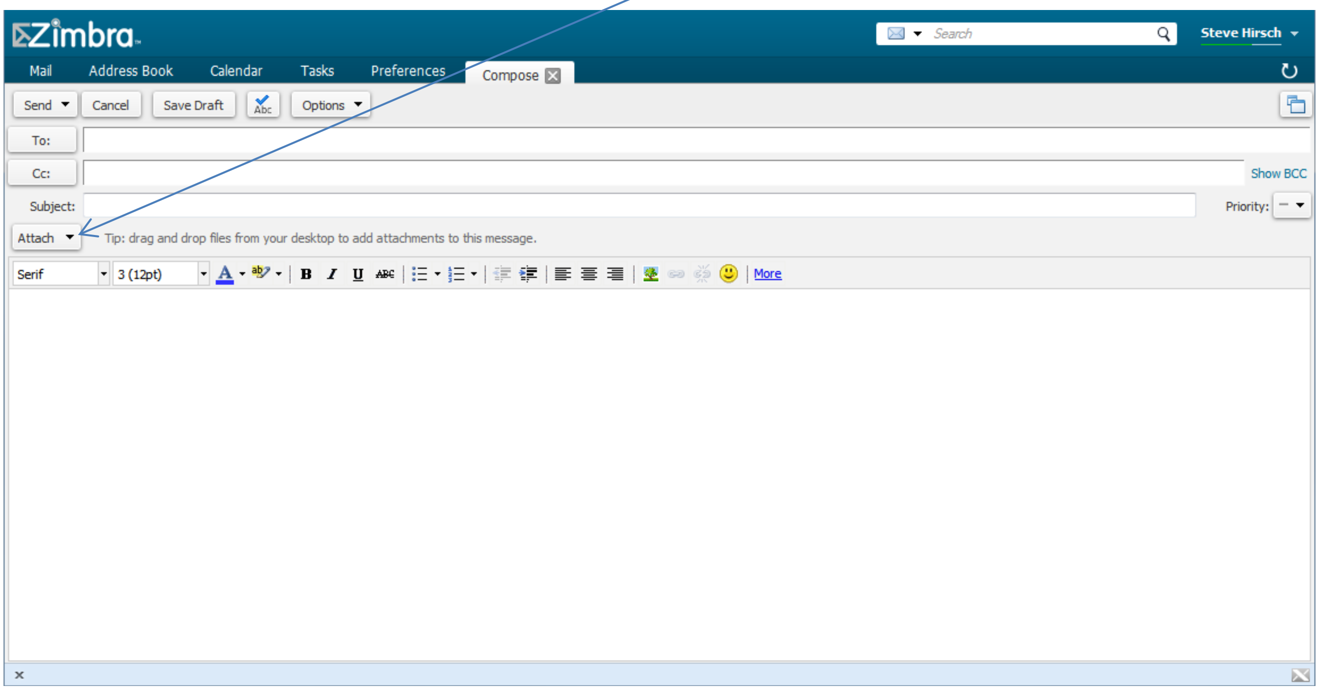
Attaching Files

Add Attachments Using Drag and Drop, or using the **Attach** button.

You can easily add attachments to an email message by dragging files from a folder into your email:

- Select one or more files and hold down the cursor on the file(s) to be attached.
- Drag the files to the message header area and release the cursor. The filenames are displayed in the header.

Alternatively, when composing an email message, you can click the **Attach** dropdown button and browse your computer's folders for the file(s) you want to attach.



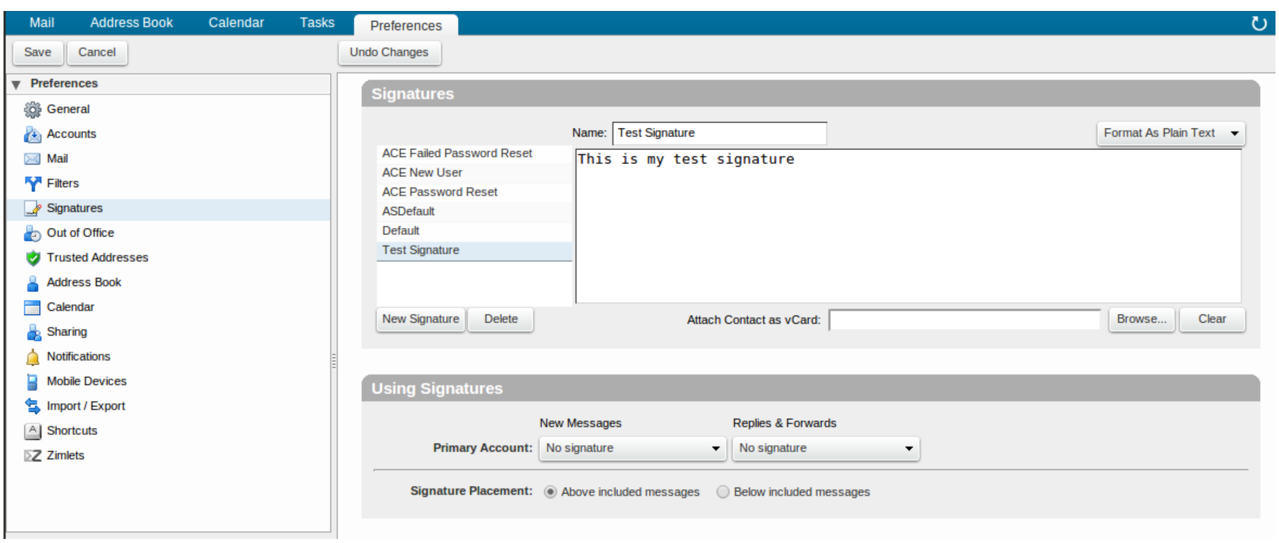
Signatures

You can include an automatic signature at the end of an email. A signature can include your name and any additional text. If you are using an HTML editor, you can format your signature, add a link to a URL and add graphics.

You can create more than one signature. For example, you can have a formal signature for emails sent to customers and an informal signature for emails sent to colleagues.

If you create multiple email identities (also known as personas), you can create different signatures and assign them to specific email addresses.

1. Go to the **Preferences > Signatures** page.
2. In the **Name** text box, type a descriptive name to identify the signature. You can create multiple signatures, so using an identifiable name here is helpful.
3. (Optional) To format in plain text, click **Format as HTML** and select **Format as Plain Text**. Do the opposite to format as HTML.
4. In the text box, type the signature text as you want it to appear. If you are using **Format as HTML**, you can add images and create links in your signature text.
5. In the **Using Signatures** section, select the default signature from the drop down menu to use with messages sent from your various accounts.
6. Select the placement of your signature in a message.
7. Select "**Above included messages**" to add your signature at the end of your reply and before the included messages.
8. Select "**Below included messages**" to add your signature at the end of the message.
9. Click **Save**



Reading Email

By default new messages are placed in your Inbox. If you have mail filters, new messages can appear in folders other than your Inbox. The number in parentheses next to each folder name indicates the number of unread messages within that folder.

Message Views

When viewing any of your email folders, you can select the default view for how messages are displayed by clicking the dropdown button at the top right corner of the view called "View." The options in this menu are:

- By Conversation
- By Message
- Reading Pane at the Bottom
- Reading Pane on the Right
- Reading Pane off

If you have chosen to display messages by conversation, there will be two additional options on this menu:

- Expand conversations from new to old
- Expand conversations from old to new

Read a Message in Conversation View

To read a message in the Conversation view, double-click the conversation containing the message. The individual messages display in the Reading pane.

- To expand the message to see all the conversations, click **Show quoted text** at the end of the message.
- To collapse the conversation view so only the last message is displayed, click **Hide quoted text** at the end of the message.
- To collapse all messages to view only the sender's name and the snippet of the first line of the message, click the **+** icon in the message header.

Read a Message in Single Message View

- If the Reading Pane feature is enabled, click the message and read it in the Reading Pane.
- If the Reading Pane feature is not enabled, double-click the message. The message is displayed in the Content pane.

To open the message, click the line that contains the message you want to read.

If you have Reading Pane enabled, the message body appears in the Reading Pane. Otherwise, double-click the message. The message is displayed in the Content pane.

Printing an Email Message

The default font size used when a message is printed is 12 points. You can change this from the **Preferences > General page**.

Note: *Do not use the browser's* ***File*** *>* ***Print*** *feature. The page will not be well-formatted, and your message may be difficult to read.*

1. Right-click on the message and select **Print**. The message opens in a new window. A standard print dialog appears.
2. Choose a printer.
3. Click **OK**. The message is sent to the selected printer.
4. Close the message window. Alternately, you can select Print from the Actions dropdown link on the toolbar.

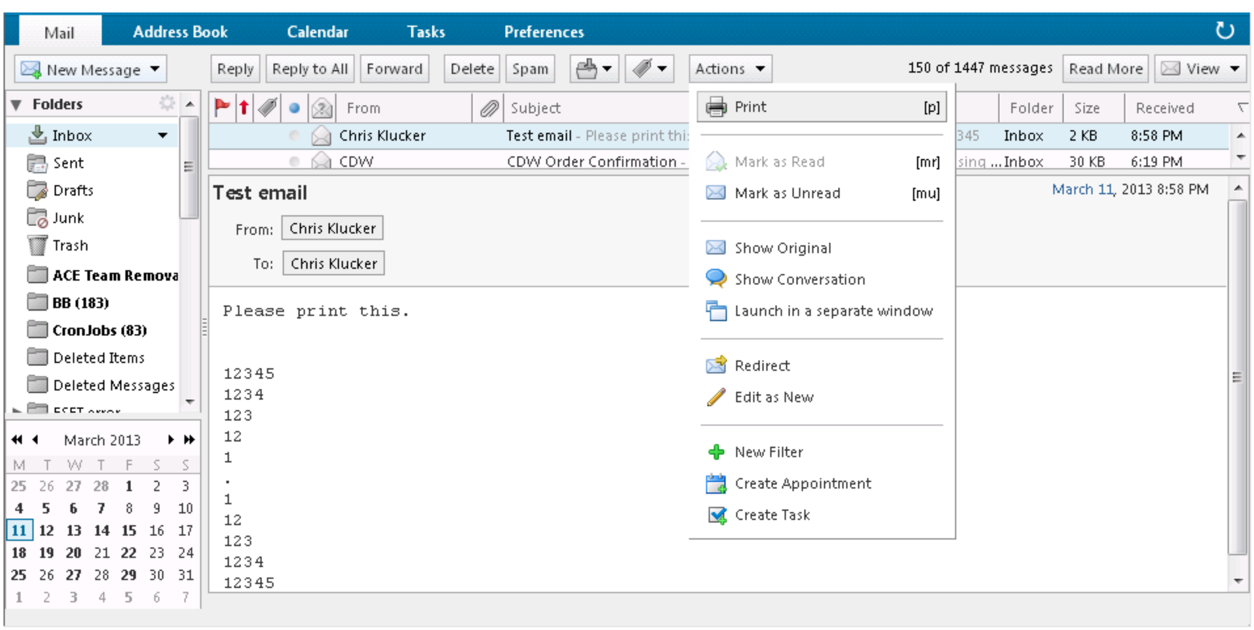
Print a conversation (all messages)

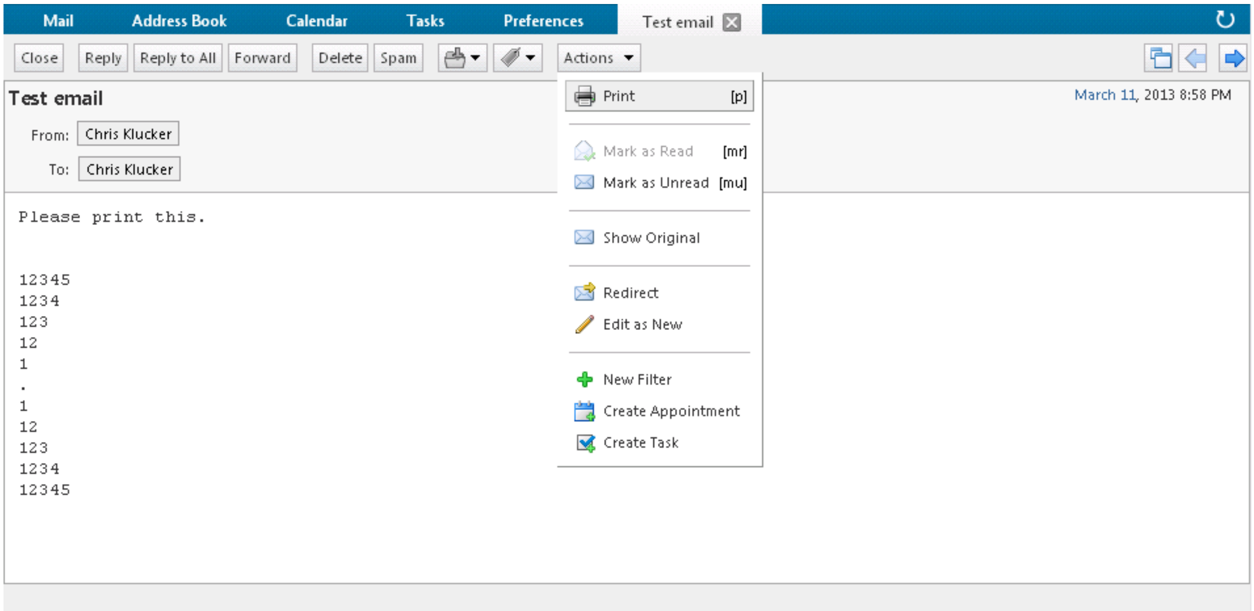
1. Right-click the conversation to be printed, and select **Print**. The conversation opens in a new window. A standard print dialog appears.
2. Choose a printer.
3. Click **OK**. The conversation is sent to the selected printer.
4. Close the conversation window.

Alternately, you can select Print from the Actions dropdown link on the toolbar.

Print one message in a conversation

1. Open the conversation and select the message you wish to print.
2. At the end of the message, click the gear icon and select print. The message opens in a new window. A standard print dialog appears.
3. Choose a printer.
4. Click **OK**. The message is sent to the selected printer.
5. Close the message window.





Zimbra Folders

Folders are used to organize your incoming and outgoing email messages. You can create your own folders, or use the system defined folders:

- **User-defined folders** - Folders you create to organize your email are displayed in the Folders list in the Overview pane. Top-level folder names cannot be the same as any other top-level folder in your email, calendar, or address book folders.
- **System folders** - System folders cannot be moved, renamed, or deleted.
  The following are system folders:
  - **Inbox** - New email arrives in the Inbox.
  - **Sent** - A copy of each message you send is saved in the Sent folder.
  - **Drafts** - Messages you have composed but have not sent are saved in the Drafts folder.
  - **Junk** - Most filtering of unsolicited automated email (also known as spam or junk mail) is handled by a spam filter before those email messages reach your Inbox. Email that might possibly be junk mail, but isn't certain to be junk, can be placed in your Junk folder.
    ****Note**: You can review these messages and either move them or delete them. If you don't delete them, they will be purged after a period of time specified by your administrator.***
  - **Trash** - Deleted items are placed in the Trash folder and remain there until you manually empty the trash or until the folder is purged automatically.

Create a Folder

You can create a standalone user-defined folder or a folder inside another folder, including system folders.

You cannot create two folders with the same name within the same parent folder. For example, you cannot have two folders named **Accounting** inside your Inbox folder, but you can have one folder named **Accounting** inside your Inbox folder, and another folder with the same name inside the Sent folder.

1. Go to the **Mail > Folders** page and click the Folders **gear icon**.
2. Select **New Folder**.
3. Enter the new folder **Name** and select a folder **Color**.
   Folder names can include any character except colon (:), forward slash(/), and quotation marks (").
   You have the option to select or subscribe to RSS/ATOM feed.
4. In the **Folders** tree, select the placement of the new folder.
5. Click **Folders** to have the new folder displayed at the top of the list.
6. Click an existing folder to place your new folder within that folder.
7. Click **OK**.

Rename a Folder

You can rename user-defined folders but not system folders.

1. Go to the **Mail > Folders** page.
2. Right-click a folder and choose **Rename Folder**.
3. Enter the new folder name.
   Folder names can include any character except colon (:), forward slash (/), and quotation marks (").
4. Click **OK**.

Delete a Folder

You can delete user-defined folders, but not system folders. When you delete a folder, the folder and its contents are moved to Trash. If you want to save some of the messages in a folder before you delete the folder, move the messages to another folder.

You can recover a folder and its contents from Trash by dragging and dropping the folder to another folder.

Important: *When you delete a folder, a message displays at the top of the pane indicating the folder is moved to Trash. Click Undo if you want to revert the deletion. This message displays for a very short time, so click Undo immediately if you did not want to delete the folder, otherwise you'll have to manually recover the folder.*

1. Go to the **Mail > Folders** page.
2. Right-click the folder you want to delete and select **Delete**.

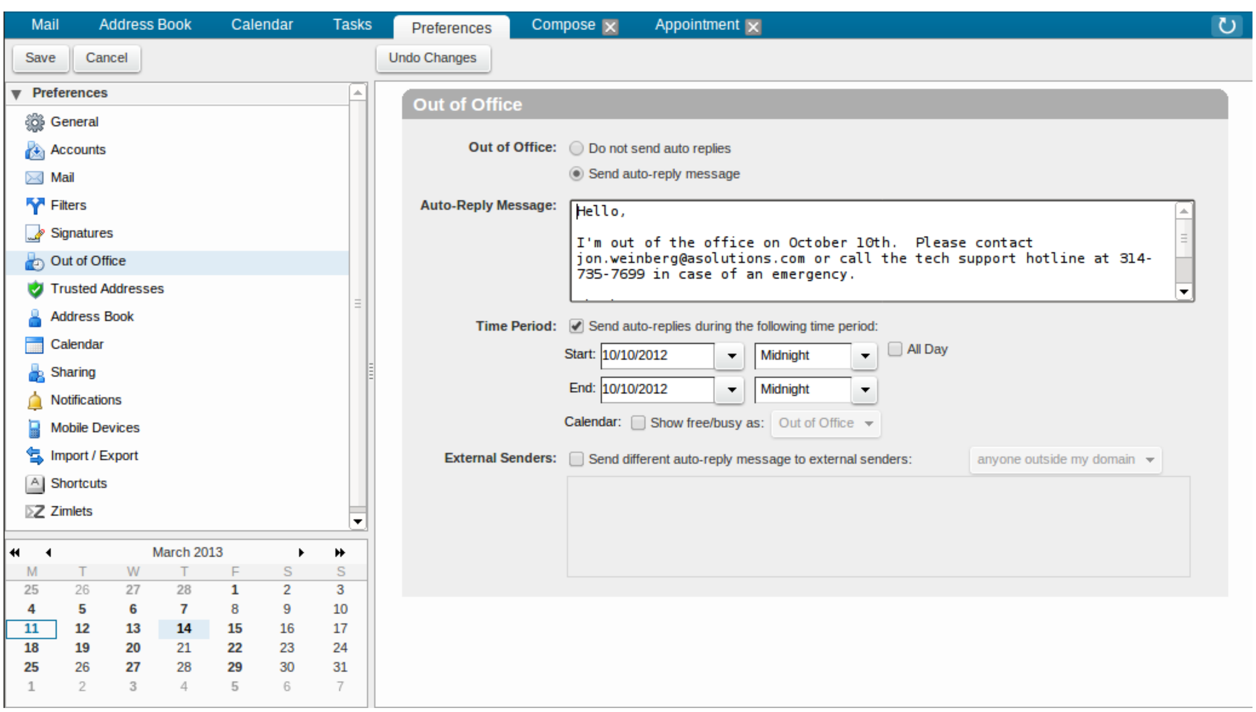
Auto Reply and Out of Office Messages

You can create a message that will be automatically sent as a reply to people who send you messages when you are out of the office.

If you want people who send you email that are not in your domain to receive a different reply message, you can create a separate message.

The auto-reply message is sent to each recipient only once in a specified interval of days regardless of how many messages that person sends during that period. The default is seven days, but the administrator can change this.

1. Go to the **Preferences > Out of Office** page.
2. Check **Send auto-reply message**.
3. In the **Auto Reply Message** text box, type the response to send while you are out of the office.
4. If you want this message enabled for a specific time frame, select **Send auto-replies during the following time period** and enter the start and end dates to send the auto-reply message.
5. If you do not specify a specific time frame, auto-replies are sent until you select **Do not send auto replies**.
6. (Optional) If you want to send a different message to users outside of your domain, select **External Senders**.
7. Select the type of external users to receive the second message. The default is anyone outside my domain. If you want contacts listed in your address books to receive the first message, in the drop-down menu select **anyone outside my domain except those in address book**.
8. Click **Save**.



Adding Contacts to Address Book

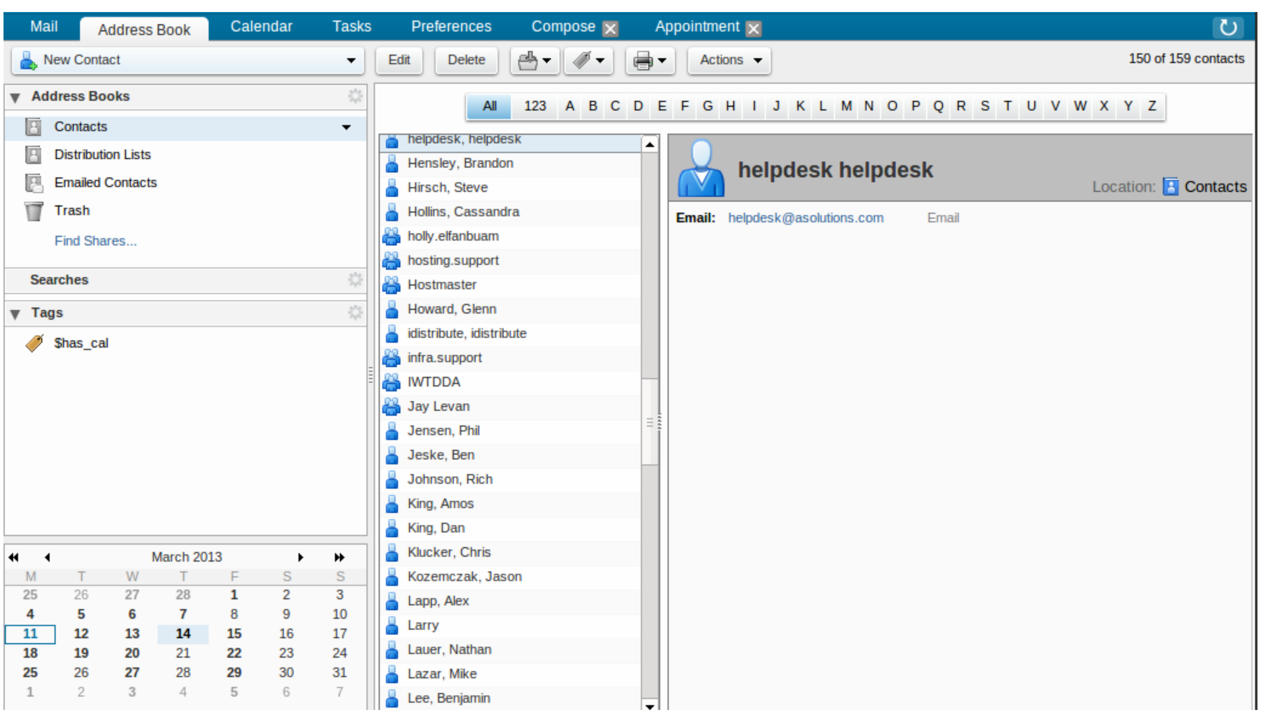
Add a New Contact

1. Select the **Address Book** application and click **New Contact**.
2. Enter the contact information and optionally upload a photo
3. A plus sign next to a text box indicates that you can add more than one entry. For instance, in the Phone text box, you can add mobile, home, work, and other phone numbers.
4. To add a custom text box, select **Other** from the drop-down menu for the text box and enter the information.
5. Select how and where you want to save the contact in the upper right of the screen.
6. For **File as**, select how to file the name. The default is by last name, first name.
7. For **Location**, select which address book to save the contact.
8. Click **Save**.

Add a New Contact from an Existing Email Message

You can add email addresses to an address book directly from the **Sent By, To, Cc,** and **Bcc** fields.

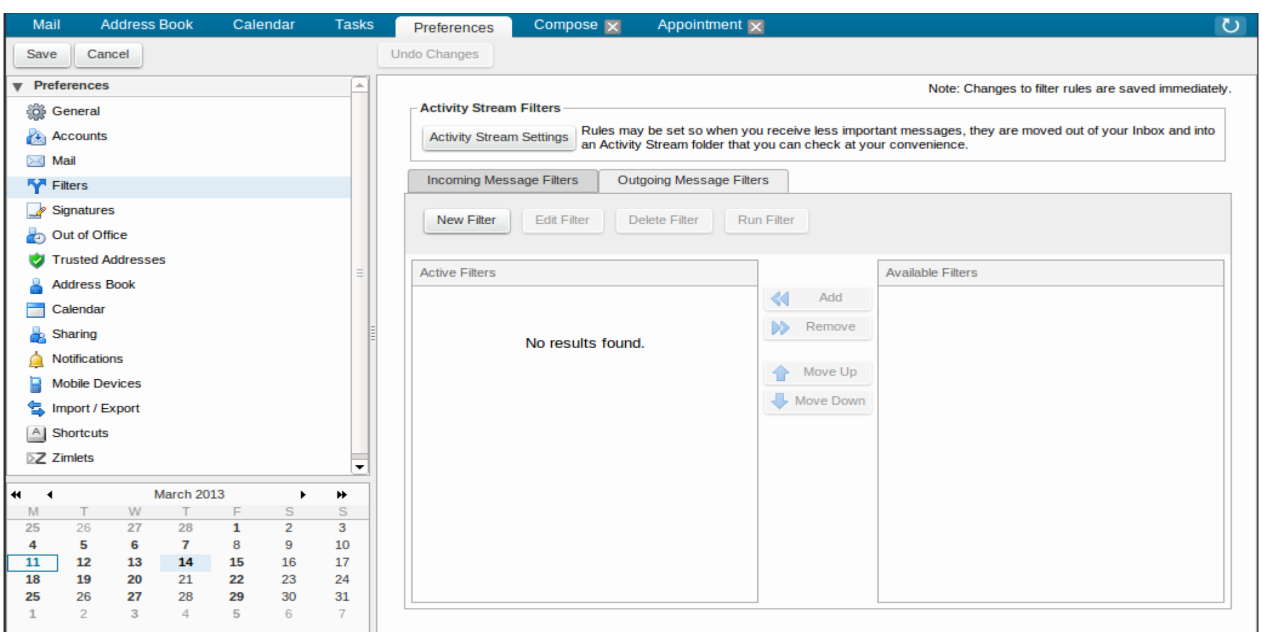
1. In an email message, right-click the name to add and choose **Add to Contacts**.
2. A new contact form opens populated with the information available from the email header.
3. Add additional information and check the pre-populated fields for accuracy.
4. Choose how and where you want to save the contact.
5. For **File as**, select how to file the name. The default is by last name, first name.
6. For **Location**, select which address book to save the contact.
7. Click **Save.**



Message Filters

A filter consists of one or more conditions and one or more actions. If the message matches the conditions, the specified actions are performed. Filters can be defined to manage incoming and outgoing email messages.

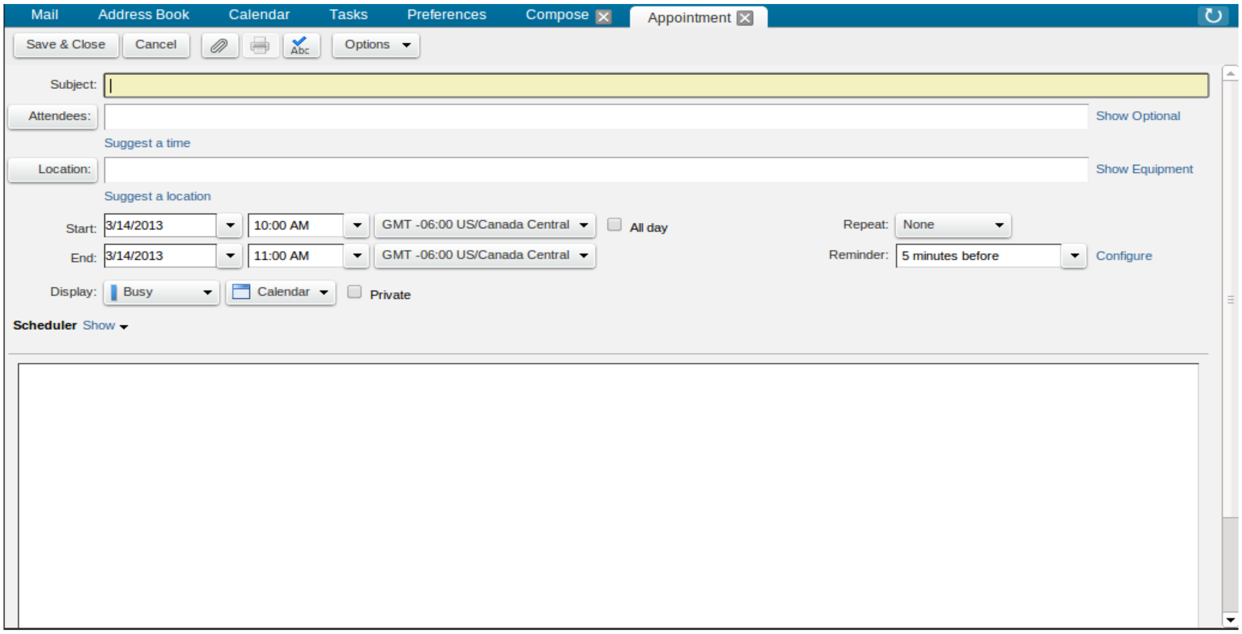
1. Go to the **Preferences** > **Filters** page.
2. Click either **Incoming Message Filters** or **Outgoing Message Filters**.
3. Select **New Filter**.
4. In the **Filter Name** text box, enter a unique name for the filter.
5. To make the filter active, check the **Active** box in the upper right corner.
6. Choose whether the message must meet any or all of the listed conditions.
   *****Note: any** means that if a message meets any one of the conditions, the action is performed. **all** means that the message must meet all conditions for the action to be performed.***
7. From the drop-down menu, select which part of the message to apply to the filter, such as Subject or Date.
8. Choose how the item must match, such as contains or does not contain.
9. Enter or select the information to compare against, such as the date, email address, or phrase. Conditions are not case-sensitive.
10. For example, if you selected **Subject** and **contains** and entered **Staff Meeting**, all messages containing Staff Meeting are filtered. The filter also catches Staff Meetings or Today's Staff Meeting, because you chose contains and not matches exactly.
11. To add more conditions, click the + button and repeat the above steps. The order of the conditions does not matter.
12. Under **Perform the following actions**, choose an action from the drop-down menu, such as Move into folder.
13. Depending on the action that you choose, you might need to browse to locate a folder or tag name, or enter an email address to redirect a message.
14. To add more actions, click the + button and repeat the above step. The actions are applied in the order in which they are listed.
15. If you want more than one filter to be applied to a message, make sure **Do not process additional filters** is unchecked.
16. When you are done creating the filter, click **OK**.



Creating Calendar Appointments

You can create appointments from the **Calendar** tab.

1. From the **Calendar** tab, click **New Appointment**.
2. If the **From:** field displays above the Subject line, you have more than one persona for your account and need to select the identity to use for this appointment.
3. In the **Subject** text box, enter a brief description of the meeting. The text added here becomes the description for the calendar event.
4. Define the start and end dates and times. If the appointment is recurring, or needs to be on multiple days, a repeating day, etc., click on the **Repeat** button, and select how often this appointment should be repeated and at what frequency (daily, weekly, other). Select **All day event** if desired.
5. In the Attendees text box, type email addresses of invitees. As you enter names, the Scheduler opens and the entered attendees along with their free/busy schedule information is displayed.
6. To help you find a time when all attendees are available, click Suggest Time. A calendar displays with the availability. As you enter attendee names, the scheduling tool will suggest a time that best fits attendees' availability.
   *****Note:*** *If an attendee has set a preference to allow only certain users to see free/busy information and you are excluded from the list, you cannot view his/her free/busy schedule.*******
7. If some attendees are not required to be at the meeting, but you want to invite them, select **Show Optional** and type their email addresses in this field. You can also do this in the Scheduler. Click the icon next to the name and select **Optional Attendee**. When the invite is sent, those names are listed as optional.
8. In the **Location** text box enter where the meeting will take place. If the location is in the company directory, when you start to type, matching locations are listed. You can also click **Suggest a location** to see a list of available locations in your company.
9. Click **Show Equipment** if you want to reserve equipment resources that have been identified in your company's directory. This also refers to conferencing systems such as Gotomeeting.
10. In the **Display** drop-down, select the Free/Busy option for this appointment
11. In the **Calendar** drop-down, select which calendar the appointment should be added to
12. Check or uncheck the **Private** flag for whether this appointment should be marked as Private.
13. In the **Reminder** drop-down menu, set an alarm notification to remind invitees of the appointment. If you have configured an email address or SMS alert in your **Preferences > Notification** page, check the appropriate box, **Email** or **SMS**.
14. If you have not configured a notification, click **Configure** to go to the **Preferences > Notification** page to set this up.
    *****Note****: Notifications cannot be set on a per-entry basis. This means that whatever setting is in your **Preferences > Notifications** configuration will be used for all of your notifications and not just for this particular calendar event or task.*******
15. In the text box below **Scheduler**, type an informative message to be emailed in the appointment invitation. To add attachments, click the paper clip icon on the toolbar.
16. The default is to request that attendees reply to your invitation. If you don't want a response from attendees, in the toolbar, click the **Options** dropdown and remove the check mark next to **Request Responses**.
17. If you prefer to defer sending out the invite, click **Save**. Otherwise click **Send.**


Mail
Address Book
Calendar
Tasks
Preferences
Compose
Appointment
Save & Close
Cancel
Options
Subject:
Attendees:
Show Optional
Suggest a time
Location:
Show Equipment
Suggest a location
Start:
3/14/2013
10:00 AM
GMT -06:00 US/Canada Central
All day
Repeat:
None
End:
3/14/2013
11:00 AM
GMT -06:00 US/Canada Central
Reminder:
5 minutes before
Configure
Display:
Busy
Calendar
Private
Scheduler
Show