SUSE LINUX

Openexchange Server 4.1

Groupware

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Please direct suggestions and comments to documentation@suse.de

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Preface

Thank you and congratulations for choosing the SUSE LINUX Openexchange Server. The SUSE LINUX Openexchange Server is a combination of a powerful e-mail server and a comprehensive groupware solution. For the introduction of a groupware solution to be successful, both for management and users, you must create acceptance for this software solution in your user base. For this reason, the following pages emphasize what to expect from a groupware product in general and from SUSE LINUX Openexchange Server in particular. The manual also gives hints for how to ensure your introduction of a product with a functional range fit for many company structures will be a hit.

Our special thanks go to the technical project leader Martin Kauss and the developers of groupware in SUSE LINUX Openexchange Server, Stefan Preuß, Marcus Klein, Benjamin Otterbach, and Marianne Schröder, as well as Michael Pawlak, Frank Hoberg, and all other participants. Furthermore, we would like to heartily thank all employees of SUSE LINUX AG for the excellent team work.

Introduction to Groupware

Since companies deployed IT systems, massive changes in their workflow became apparent as most processes of a company are computerized. Things that happened solely through a close collaboration in the past are today performed asynchronously in different locations and not only by people working in the same company. The modern requirements of a company for both internal and external coordination, communication, and quality of service has given rise to a type of software application commonly known as "groupware."

1.1 Advantages of Groupware Solutions

The SUSE LINUX Openexchange Server combines a powerful, web-based groupware solution with the seasoned SUSE LINUX eMail Server III, which is based on the stable SUSE LINUX Enterprise platform. You chose one of the most comprehensive solutions in this category that is mostly based on free software.

1.1.1 Cultivating Relationships with Customers

Most companies have noticed that the relationship with customers plays a special role in their success. Customers are easily frustrated if they must repeat their requests or must wait indefinitely until the required employee returns. The pace of the market's change requires a fast and flexible company structure to withstand the pressure of open competition. The less hierarchical structures (team and project work) require an increase in communication and coordination of all participants. A company organization optimized in relation to communication and flow of information plays a central part for the business's internal events as well as for the cooperation with customers, suppliers, and business associates. In this respect, it is important to avoid breaches in communication structures and to close informational gaps to increase the flow of information.

1.1.2 The Groupware Solution

With job distribution, project management, appointment calendars, and other shared resources, groupware makes it easier and faster to coordinate a decentralized employee base. The SUSE LINUX Openexchange Server offers groupware that can meet these needs. Even in smaller businesses, coordination between all employees using this type of application helps improve efficiency and avoid collisions. In most companies, a systematic collection of information and control over communication with customers is a challenge that requires a centralized approach for data storage and communication structures so current information is accessible. Grouping information, like address sources, in groupware can significantly decrease the need for data storage and maintenance. If a change in address data becomes known to one person in the company, the new address can be made known to everyone in the company by updating the address in the database. For this process to be successful, it is important that all colleagues are aware of the consequences of entering false data and that the permission structure is implemented properly.

1.1.3 Central Data Storage

The possibility to assign a company address to multiple contacts avoids redundant data. Another type of software that meets similar requirements is "Customer Relationship Management" (CRM). However, optimization of work processes and basic operations, rather than optimization of certain tasks (CRM), provides the real advantage of a groupware solution. The interoperability of the SUSE LINUX Openexchange Server as well as other systems in the company (e. g., ERP, CRM) is an important factor for fulfilling the requirement of groupware to extend and integrate existing IT systems. Another important aspect of such an interoperability is the possibility to manage documents associated with customers or projects.

1.1.4 Information for Everyone

Usually a document is created using a word processing program or an editor then sent using an e-mail program while the document remains inaccessible to everyone on the creator's computer. It would be sensible, in contrast, to organize all relevant data concerning customers and projects using the project or document management of the SUSE LINUX Openexchange Server. Your colleagues can then access documents, e-mails, calculations, appointments, and notes concerning a project or customer, if permitted. With the permission management system, grant access to all people involved. This feature, combined with the job management system and the scheduler, helps managers stay in control of a project.

1.1.5 Information Pool

Of course, you can extend the illustrated example concerning customers to a verification of offers, a contact history, or contract data. However, the effective collaboration of your project team and colleagues is primarily ensured by complete documentation of the project's progression and the relationship to your customers. Documenting all business events creates the basis for meeting all expectations regarding customer relations and project flow.

1.1.6 Keeping Track

Other tasks related to appointments, such as managing resources, can also be simplified by being controlled centrally. Using the groupware's resource management can help meetings be organized better. It also makes it possible to find out who is currently using a resource and to manage resources better.

1.1.7 Everyone Participates

To implement a groupware approach successfully in your company, both the planning of its deployment and the users' acceptance of the corresponding changes in the workflows are vital. The SUSE LINUX Openexchange Server, with its carefully chosen functionality, provides your colleagues with a real added value.

One thing is important to remember: Only data entered into the calendar can be found using it. Those who do not assign all documents they send to a customer to the specific customer or project keep the old structures and inefficiencies. Groupware can only help if it is used.

1.1.8 Easy Start

The formation of workflows must be taken forward step-by-step with the acceptance of the software by every user. In doing so, internal company hierarchies must be overcome, because the possibility to combine different people, such as the operator, the head of a department, and the director to a working group, is central to modern team work. The rights and privacy of each group member must be protected and guaranteed while workflows and processes are delegated effectively and precisely.

The possibility to model existing processes allow for an easy introduction of the groupware. Although the SUSE LINUX Openexchange Server allows definition of new processes and workflows that override analogies and hierarchies of existing company structures and that are oriented along the possibilities of the SUSE LINUX Openexchange Server to create department-spanning workgroups that incorporate external partners or even customers, these extensions should be introduced gradually after successfully creating a basic acceptance by your users in first modeling already existing processes.

1.2 The Concept

The key to a successful application of a groupware solution is that all its functionality must be available to each and every user in your company to help them handle their work more efficiently.

1.2.1 Functional Range

The SUSE LINUX Openexchange Server continues the successful concept of the SUSEproduct line of powerful mail servers. It furthermore offers additional functionalities in the form of a powerful groupware solution.

Your users may access all offered functionality of the SUSE LINUX Openexchange Server unrestrictedly through a powerful web front-end, which not only guarantees all users a consistent and standardized interface on the client side, but releases the administrator from the burden of possible installation and maintenance tasks on the client computers. On the server side with the SUSE LINUX Openexchange Server, find a secure and powerful platform that is mostly based on free software.

1.2.2 Modules

The SUSE LINUX Openexchange Server only comprises those functions that company infrastructures of any size really need while discarding superfluous and redundant functions. In the segment of appointment management and coordination, the SUSE LINUX Openexchange Server offers a personal calendar, group calendar, appointment scheduler, resource management, and reminders as well as a powerful availability check and automatic appointment querying.

In the core of the functionalities of the SUSE LINUX Openexchange Server, find, besides the appointment management, the contact management to organize your customer and partner addresses with their corresponding contacts. Naturally, the contact management possesses an export function of contact data (vCard). Due to the open structure of the application, you also have the possibility to access the databases directly (e. g., for data imports). The module job management organizes group tasks and allows creation of new jobs with confirmation and reminders by e-mail.

Moreover, the SUSE LINUX Openexchange Server can replace previous tools for project management completely and efficiently. In the project information module, create project-bound jobs and grant authorized users access to all relevant information regarding the project and all objects (Addresses, Documents, Forums, etc.) linked to it.

Another part of the SUSE LINUX Openexchange Server is the integrated document management. It allows a folder and group-based filing of your documents, upload and download via Internet, and includes a document-based permission management with an inheritance of folder permissions to subfolders and documents.

Futhermore, the SUSE LINUX Openexchange Server offers a module for knowledge management for collecting any kind of knowledge centrally and sort, manage, and keep it available by categories and subcategories. Every user may extend existing knowledge items and create new entries or new categories. The knowledge area is also organized in a folder structure and contains a search by title for each entry. Using the linking technology, assign documents, forum entries, bookmarks, or jobs to each entry.

The SUSE LINUX Openexchange Server also offers a powerful bookmark management system. Using the bookmark management, interesting links can easily be made available to all employees. Access to bookmarks may be restricted to yourself or groups.

The SUSE LINUX Openexchange Server can manage an unlimited number of forums and provides users with functions like subscribing to a forum or information about the most frequented forums. Additionally users may subscribe to a specific entry on a forum, so that entries and answers will be mailed to them. The forum functionality is complemented by the pin board module. The pin board is a virtual bulletin board onto which every user may "pin" a note. All entries come with a life time. Authorized users may publish these notes on the portal page of the SUSE LINUX Openexchange Server for certain users or groups. Another efficient possibility for team work are the notes modules. In most modules of the SUSE LINUX Openexchange Server, users may attach notes to each object.

1.2.3 The Web Front-End

The SUSE LINUX Openexchange Server is comfortably administered using the web front-end. Additionally, the user interface on the client side and the tool for e-mail management (Webmail) use the same functional web front-end. Users only need to be introduced to the handling and usage of one web front-end.

No other client-based software is needed. Every user of the SUSE LINUX Openexchange Server may log in to the Webmail module to access or edit their mail completely independant of the client platform. The consistent folder structure based on the IMAP4 standard can be accessed any time with any browser. The Webmail module may be configured to to use the company domain in the e-mail addresses of users. Additionally, mailing lists may be generated and filtering rules defined. Signatures and vCards can be added and LDAP address books accessed. OpenLDAP provides the basis for secure user authentication.

1.2.4 Enterprise Server

The operating system for the SUSE LINUX Openexchange Server is based on the SUSE LINUX Enterprise Server. The SUSE LINUX Enterprise Server is known for its robustness and reliability and meets the highest security demands. Furthermore, it offers a professional maintenance support and longer product life cycles. Moreover, the SUSE LINUX Openexchange Server is based on the approved open source mail server Cyrus (IMAP) and Postfix (SMTP, POP3).

1.2.5 Security

The aspect of security should play a dominant role in all companies. When communicating with your own colleagues, partners, and customers over Internet, security has a special significance. Security is mainly a concern for the client side. PCs on the client side, particularly common mail and groupware clients (fat clients), pose well-known security threats.

Also, web servers, which, unlike Apache, are not based on the relatively secure Linux platform, create known vulnerabilities an attacker could use to reach the underlying operating system core. SUSE LINUX Enterprise Server provides efficient protection from attackers with its user and permission philosophy as well as a package selection continuously maintained and updated by SUSE.

For external access, the SUSE LINUX Openexchange Server supports SSL encryption, the standard used by banks. This allows secure worldwide access to company internal data from any PC.

1.2.6 Open Standards

In a world in which IT infrastructures are subject to a continuous change, open standards that allow an integration of different products that are already in use in your company or will be in the near future become more and more important. The SUSE LINUX Openexchange Server belongs to a type of solutions that are based on industry standards. Therefore, the SUSE LINUX Openexchange Server allows components to be added or replaced with third party products. You are not forced to use only additional SUSE LINUX products, but are free to do so.

The SUSE LINUX Openexchange Server supports every important communication standards, like LDAP and IMAP, completely and unrestrictedly. Every internal directory access is handled by the SUSE LINUX Openexchange Server via LDAP without the need for an additional directory service.

1.2.7 Extensibility

The SUSE LINUX Openexchange Server knows all protocols and standards commonly used in modern Internet communication so can be extended on a very large scale. The SUSE LINUX Openexchange Server can primarily be seen as an “alternative” to products like Exchange or Groupwise, which means that no resources can be imported, for example, from an existing Exchange server.

The SUSE LINUX Openexchange Server does come with a synchronization function to use Outlook as a client. Supported are MS Outlook of Windows 98, NT, 2000, and XP. Synchronization with the Palm client is possible as well. Using the synchronization tool, a synchronization with most PDAs can also be done since most handhelds and modern mobile phones can, in turn, be synchronized with Outlook or the Palm client using a standardized interface.

Specially trained partners of the SUSE LINUX AG are available to assist you. A software-based tool for migration from MS Exchange will soon be available as well. As such undertakings are usually very complex, SUSEcan provide consultants for project planning and realization. Specialized partners may be brought into these projects as well.

1.2.8 Unified Messaging

To provide your colleagues with fax and SMS services, using the SUSE LINUX Openexchange Server web front-end, use the ferrari fax server. The ferrari fax server is integrated part of the SUSE LINUX Openexchange Server and can be used as an ideal extension of the SUSE LINUX Openexchange Server webmail client. Using the webmail client, users can send faxes and SMS messages as easily as writing standard e-mails. Instead of e-mail addresses, specify valid fax and mobile phone contacts. More information regarding the ferrari fax server can be found at `http://www.ferrari-electronic.de/`.

1.2.9 Licenses

All license fees only depend on the number of users that use the groupware system, no matter which client they use to access their data and no matter how many servers are used. Because the SUSE LINUX Openexchange Server does not depend on other products, no additional costs arise.

1.3 Introducing the Groupware

The following provides suggestions and examples of how to successfully introduce the SUSE LINUX Openexchange Server and cause as little irritation as possible. For that purpose, you need to give some thought to the users and groups to create and to each project and work group. The question to answer primarily is how to model your businesses structure in terms of the modules of the SUSE LINUX Openexchange Server. The resulting work flow may require the users to change their work habits, but only to the better.

Still, the SUSE LINUX Openexchange Server leaves you with the utmost freedom to model the company processes, define groups, projects, forums, and the structured composition of your knowledge base. Most important for the efficiency of the new workflow are the user privileges. Everyone should easily be able to find and access necessary information, but at the same time the privacy of each user must be protected. Only then will the SUSE LINUX Openexchange Server merit the trust of the users and be used as much as possible.

1.3.1 Company Structure in Terms of the Product

Groupware solutions, like the SUSE LINUX Openexchange Server, by nature encourage the creation of small teams that you should anchor in the user and group management of the SUSE LINUX Openexchange Server. In doing so, it is important to decide which part of the company structure these teams represent. That is how productivity is increased by forming a certain team.

A group may be an already existing team or a whole department, such as purchasing, controlling, or accounting. It may be based on certain projects or assigned to a specific customer. A gradual forming of new groups allows people to get used to new concepts and actually be convinced by the improved efficiency.

1.3.2 System Requirements

On the client side, with the platform independent web concept, there are hardly any technological requirements that limit the use of the SUSE LINUX Openexchange Server. A modern browser, such as Mozilla 1.x, Netscape 6.x or 7x, Opera, or IE6 should be used with JavaScript activated. You do not need to concern yourself with Java, as this functionality is provided by the server.

It is important that your users remember that each new page in their browser is created by the application server. It is vital that, for example, the cache function of the browser is disabled and that each user gives up using the navigational elements of the browser, as they might activate data that is "invalid", because it comes from the browser's cache. To view information on the previous page quickly, it can be useful to use the 'Back' function of the browser, but not if any new information was entered. Usually, it is more advisable to use only the GUI of the SUSE LINUX Openexchange Server with its controls while navigating the groupware.

On the server side, the system administrator must ensure that the Java engine is running and working. This and the presence of other components, like a Postgres database, an OpenLDAP server, or the Apache web server, is ensured when installing the Openexchange Server 4.1.

The interaction among the groupware's three main components, the mail server, the LDAP server, and the actual groupware (application server), works as follows. The LDAP server is responsible for every aspect of user authentication. All users of the SUSE LINUX Openexchange Server are created and managed in the LDAP directory. Additionally, the LDAP tree contains the e-mail folder structures for each user that receives e-mails from the Cyrus IMAP server. Also, all public and private address books are saved both in the database and the LDAP server. Individual information about specific user and object permissions are, on the other hand, stored in the groupware and thereby in the Postgres SQL system. The Apache server delivers the pages for each of the application server's processes.

Depending on the qualification of your colleagues, it might be useful to make these correlations known in an internal training. A deeper knowledge of all the connections and interactions is not necessary, however, to successfully use all the features of the SUSE LINUX Openexchange Server.

1.4 Working with the Groupware

Only if, little by little, everyone uses the available modules efficiently according to their demands will the gain such a solution provides fully show. Paper notes, secondary applications, external address books, fax directories, address books, and a paper calendar should all be obsolete. Multiple data maintenance not only wastes time, but undermines the concept of groupware with its centralized data storage.

1.4.1 Interaction of the E-Mail Server and Intranet Modules

Both the e-mail server and the intranet modules of the SUSE LINUX Openexchange Server work together transparently and effortlessly. The most important shared information is combined in the LDAP directory, which plays a central role as the directory service regarding data storage and delivery. Because of IMAP, the mail management remains centralized, so your users have access to their mails from every workplace. It is useful to demonstrate the advantages of IMAP in an introductory training to increase the acceptance of the SUSE LINUX Openexchange Server. Furthermore, the groupware uses the functions of the built-in e-mail server for notifications that are automatically generated and delivered to the users, like the confirmation of an appointment, a notification that an appointment has changed, or a reminder for an upcoming job. Additionally, the Webmail function accesses the e-mail server directly. To complete our survey, some general hints about searching for and locating information in the groupware are provided. Share these with your users during training.

1.4.2 Search and Find

A central question for the efficient handling of all the groupware modules lies in finding the desired information quickly and without hassle. Many search strategies can be applied, such as complementary or overlapping search, search within just one module, and, of course, the convenient search with wild cards. Information is the heart of a groupware and finding and evaluating data is an integral part of working within groupware. For this reason, it is most important that every user knows how and where to find necessary information.

1.4.3 Keeping Track

First and foremost, it is important that your users can always keep the upper hand on all information, so they can prioritize everything the information flood may contain. A first glimpse of all relevant information is contained in the portal page on which all relevant data for that day is displayed when the user logs in.

1.4.4 Using Every Available Tool

On the portal page, for example, every user may find out whether new e-mail messages are available or if jobs or appointments need attention. All current projects and overdue projects are also displayed. Another important function to keep track of everything is the 'Current' page. It gives a quick overview of all news in each module posted by other users while the user was away. The time frame to display can be specified and different parts of the software can be accessed directly to see more detailed information or modify an upcoming task.

It is not only very important that users assiduously and effectively use the linking function to foster an exponential growth of informational content (without increasing the volume of the stored data), but that existing links are displayed while someone looks for information, so connections can be discovered that would not become apparent in a more linear search. When looking at a certain project and examining its links, the user can find all documents and appointments related with the project. The informational structure therefore is very important, but such a structure is not dictated by a good groupware like the SUSE LINUX Openexchange Server. It is completely your responsibility and your opportunity to make it perfectly suit your needs.

1.4.5 Privacy

The successful introduction of a groupware concept can only fail due to a lack of acceptance by your users. A common and valid argument against central data storage in general is a possible violation of users' privacy. Therefore, the user and group management of the SUSE LINUX Openexchange Server guarantees, despite the team philosophy, a complete and comprehensive protection of your private and personal data at any time from public areas on the basis of the LDAP functionality.

1.4.6 Corporate Identity

Because the SUSE LINUX Openexchange Server qualifies for businesses of all sizes, adaptability and configurability of the intranet functions or the look of the client application are indispensable characteristics. Of course, it is also possible to adapt the layout of the web interface to the corporate identity of your company.

1.4.7 International Standards

SUSE LINUX Openexchange Server is optimized in many ways for use in international companies. Using the setup module for your user profile, easily set the time zone of your job. Already existing appointments are automatically converted to the time zone values chosen. This makes it easy to keep track of your appointments in foreign countries. Additionally, SUSE LINUX Openexchange Server allows you keep track of project and job costs, taking care of different currencies that might be needed for each job and project. Additional currencies can be added by your system administrator. IS and SHOULD costs of an entire project can be tracked using the information of all related jobs automatically. Even jobs using different currencies can be tracked. All used currencies are tracked separately in the detailed view of a project.

The complete web front-end is available in both English and German. Using the English web front-end uses the US date format. Change between the English and German web front-end easily using the setup module of SUSE LINUX Openexchange Server. SUSE LINUX Openexchange Server also supports UTF8 font codings. This allows you to make inputs in the web front-end using foreign or special font types, such as Japanese letters. Even the webmail client allows you to use UTF8 font codings. Another feature is the support of a national holiday list. Predifined holidays for different countries and cities can be easily provided to all system users on their calendar by your system administrator. Furthermore, each user can add his own list to add personal holidays.

1.5 Getting Started

On the following pages, find an in-depth documentation of all functions of the SUSE LINUX Openexchange Server. Now it is up to you to make the introduction of the groupware concept a success in your company as well. Start by training small teams and organize the introduction gradually. The enthusiasm of your colleagues will come as expected and guarantees a further motivation of all employees.

Basics

This chapter provides information about logging in and out and for common elements, such as permission management, notes, links, and global search. It also provides an overview of buttons commonly used in the application.

2.1 Connecting

2.1.1 Login

Log in to identify and authenticate yourself. This process gives users access only to the sections to which they should have access.

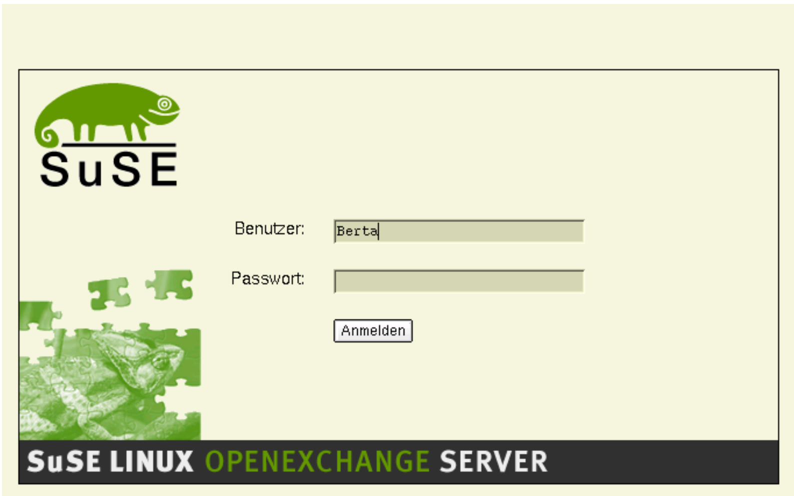


Figure 2.1: *Login Page*

This page has an entry form for your user name and password. Authentication is case sensitive. If you do not enter them properly, an error message appears.

2.1.2 Logout

When ending your session, you should always log out of the application. To do so, click 'Logout' in the upper right corner of the groupware interface.

2.2 Graphical Buttons

Use the green SUSE LINUX Openexchange Server menu bar at the top of your browser window to access 'Help' or the 'Setup' dialogs or use it to log out. Beneath, find the icons of the groupware. Use them as described in the following.

Portal This icon returns you to the portal page. Refer to Chapter 3 on page 37.

Calendar The calendar icon takes you directly to your appointment calendar. Existing appointments may be viewed there using the day, week, or month view. Also modify existing appointments or create new entries. Refer to Chapter 4 on page 43.

Address This opens your contact module, which contains, in a concise, alphabetically-sorted table, all your private and global contacts and company address entries. Here, it is possible to edit existing contacts and company addresses or enter new ones. Also use it to access the address data of known contacts for a master address. Refer to Chapter 5 on page 63 and Section 5.1 on page 64.

Job This opens a list of all your incomplete jobs. All jobs are listed in a table including all vital time data. New entries can be created quickly. Existing jobs can easily be modified. Also delegate jobs in this area. For information, refer to Chapter 6 on page 79.

Project This opens a list containing all projects that have been assigned to you. From the concise table, quickly access all relevant data about your projects. Also use this to modify projects or create new entries. Refer to Chapter 7 on page 91.

Document Use this icon to open the document management system of the groupware. The file manager display makes it easy to access documents. New documents can also be added. Refer to Chapter 8 on page 103.

Knowledge This opens an area in which all articles created or collected by your colleagues can be found for you to benefit from their knowledge. A folder structure helps you sort and index all knowledge entries. Refer to Chapter 9 on page 115.

Bookmark This accesses the central bookmark directory. Similar to your browser's favorites or bookmarks list, links to various intranet and Internet pages are placed in a folder hierarchy. The bookmark page of the groupware has the advantage that all interesting links can be shared with your colleagues. You may also modify or create new entries here. Refer to Chapter 10 on page 125.

Forum Using the forum icon, open the forum of the SUSE LINUX Open-exchange Server. It enables you and your colleagues to discuss various topics. Each discussion is divided into threads to make it easy to follow a given discussion. You can also subscribe to threads or even an entire forum, so answers are sent to you by e-mail. Thanks to the permission management system, you can also grant external business partners access to the forums. Refer to Chapter 11 on page 135.

Pin Board This is a system-wide note system in which to create notes for yourself and other users of the system. Clicking here opens the area in which to view and modify existing notes and create new ones. Refer to Chapter 12 on page 141.

E-Mail This accesses your Webmail account. Webmail is a complete e-mail client that can be used to read, compose, and manage your e-mails. Information is available in Chapter 13 on page 145.

2.2.1 Buttons to Create, Edit, or Delete Objects

 Create

 Create new folder (Documents, Bookmarks, Knowledge)

 Edit

 Delete

2.2.2 Buttons for Notes

 Attach note

2.2.3 Miscellaneous

 Move document

 Display online help about the active area

 Print the list of objects. The active table is converted into a print-optimized table, which you can print using the print function of your web browser.

 Using the small calendar, select a date with a few mouse clicks.

2.3 Permission Management

The SUSE LINUX Openexchange Server groupware permission management system has two aspects. On the one hand, administrators can assign permissions to entire modules of the groupware to users. On the other hand, individual read and write access can be specified for each object. The permission management is hierarchical: if a user does not have access to a module, none of its objects can be accessed.

2.3.1 Permissions for Modules

Permissions for Single Modules

The administrator may specify a profile for each user that specifies which modules may be accessed. If you do not have access to a certain area, its corresponding button does not appear in the main navigation bar. If you need access to a module, request clearance from your administrator.

Note

New permissions only become active the next time the user logs in to the groupware.

Note

Defining Object-Based Permissions

When you create or edit an object, specify who has access to that object. If someone does not have access to an object, it is not available in search results or other lists. Assigning permissions is usually done using the 'Read access' and 'Write access' tabs, which can be opened while creating or modifying an object in each module, such as 'Calendar', 'Jobs', or 'Projects'.

Using 'Read access', specify which users may only read this object. Using 'Write access', specify those users who may read and modify this object. 'Write access' includes the permission to delete an object. Access can be granted to entire groups or single users.

Drafts

Use 'Drafts' to assign a draft in which participants and read and write permissions are predefined. If you choose a predefined draft, matching all your needs, no further manual setup of read and write permissions is needed. To add drafts, simply click the tabs 'participants', 'read access', and 'write access' to define own read and write permissions. A list of participants is only stored in the job module.

If you have already assigned participants as well as as read and write permissions for the new object, you can store this settings as a draft. To do so, click 'drafts'. In 'title', assign a name to the new draft. In description, add a short comment regarding the settings to store in this draft. To use the new draft as default for all new objects of a specific module, activate 'Default draft'. To save the draft, click 'Save'.

Existing drafts for the current module are displayed in a list at the bottom of the form. To assign an existing draft to the current object, click the draft in the list on bottom of the form or select the corresponding entry in the draft field in the main tab. Drafts are are stored and organized for each module section separately. For example, you cannot use drafts for the job module in the project module.

Figure 2.2: *Selecting an Existing Draft*

Figure 2.3: Adding a New Draft

> **Note**
>
> **Read and Write Access**
>
> Further information regarding read and write permissions can be found in the respective chapters. When creating an object, you will usually find defaults that allow you to work quickly and easily.
>
> **Note**

Groups

Add entire groups by selecting the group in the upper left list then clicking 'Add >'. The chosen group is then added to the list on the far right that contains all chosen groups. Search for a group by entering its name in the text field, using wild cards if desired (refer to Section 2.6 on page 32), then clicking 'GO'. To remove a group from the right list, select it and press '< Remove'. In all lists, make a selection of multiple items by holding down Ctrl. By default, you can only see your own user groups.

Users

To add a person, first choose a group in which the user is a member from the left list in the section 'Groups of users'. Then click 'Show users'. All members of the chosen group are listed in the left list in the 'Users' area.

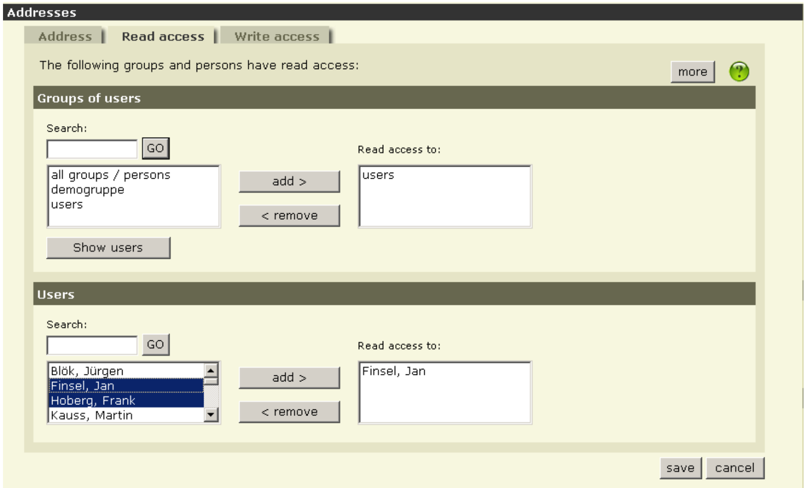


Figure 2.4: *Read Access — Assigning Object Permissions*

To assign a certain person to an object, select the person from the left list and click 'Add >'. Alternatively, use the text field above the list to search for a user directly. Search by login name or first and last name. Wild cards are accepted here as well.

Users without access to the module cannot be chosen. These users are marked with light gray letters. Users that can be selected are shown in black. This enables you to see that there are more users in a user group that will not be able to access the new entry.

A more detailed description can be found in the following pages or the online help of each dialog. More about the search function can be found in Section 2.6 on page 32. To remove a person's assignment to an object, choose the person from the right list and click '< Remove'.

Delete Right

Use the list field 'Delete right' to choose which users should be allowed to delete this job. Activate 'Like write access' to grant delete rights to all users with write access to the object. Choose a single user to grant the ownership to this object. The user would become the only one allowed to delete the object later. Additionally ,this user is able to hand over the ownership of the object to another user. The user with the delete right is shown as the owner of the job in the history of the job's detailed view.

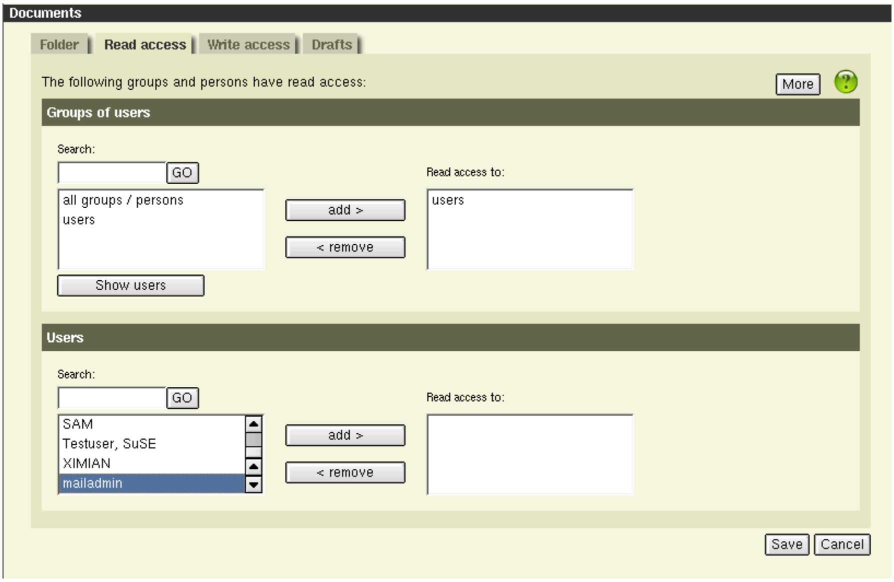


Figure 2.5: *Users without Access to the Module Cannot Be Chosen*

Extended View

Apart from the basic form for assigning someone to an object, you can also use an extended view. Simply click 'more' in the upper right of the status bar.

In the extended view, see a tree representation of all existing groups on the left side. If you click the plus sign in front of a group's name, the view is extended to show all group members.

To assign a person or group to the object, mark it by clicking the box in front of the respective name. Next, click 'Add >' and the chosen users and groups are assigned to the object. Groups are listed in the upper list. People are listed in the lower list.

Users not granted access to the module cannot be chosen. These users are marked with light gray letters. Users that can be selected are shown in black. This enables you to see that there are additional users in a user group that will not be able to access the new entry.

To remove a person or group from the object's permissions, choose it from the respective list and click '< Remove' below the corresponding list.

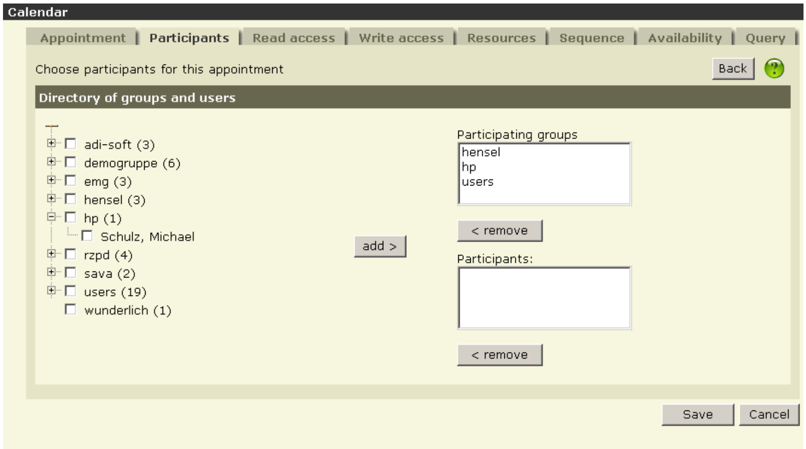


Figure 2.6: Extended View of the Permission Management

2.3.2 Special Access Permissions

All modules allow a "quick setting" to be used instead of assigning permissions individually when creating an object. In the main 'Address' dialog, you can, for example, create the address globally for every user or privately for yourself only. You only need to choose 'everybody', 'private', or 'individually'. The options have the following significance:

Everybody

This object is public and can be accessed by every user who may also access this module. When creating an address with this option, it is added to the public address book of the LDAP server.

When choosing this option, every user gains both read and write access to this address. To grant access only to a specific group, choose 'individually'.

Private

The object is private and may not be accessed by anyone but yourself. When creating an address using this option, it is added to your private address book on the LDAP server. You are the only one that has read or write access.

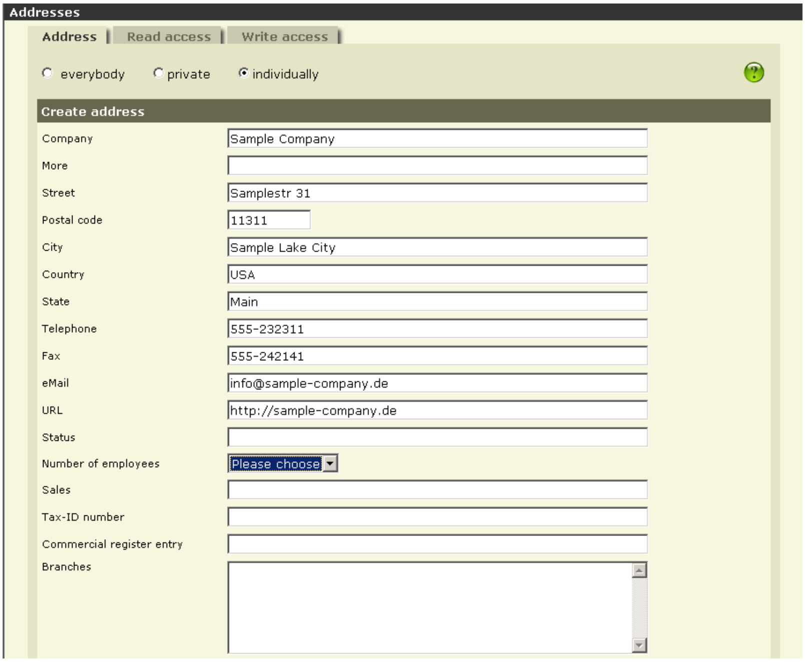


Figure 2.7: Read and Write Access to Addresses

Individually

Using this option, you must specify the people or groups to whom to give access manually using the tabs 'Read access' and 'Write access'. This option is also activated automatically if you make manual changes in these sections. Even if you did not assign read and write access to yourself, you will keep it until someone who was explicitly granted access changes the entry.

Caution

Because these options sometimes work differently from one module to the next, this is addressed in each chapter. In principle, write access automatically grants read access. If you give someone read access, however, write access is not given automatically.

Caution

2.4 Notes

Notes can be attached to almost any object. Specify each time whether the note is only for you or for everyone that can also read the parent object.

2.4.1 Viewing Notes

From the details page of an object (e. g., an address), open the notes by clicking the 'Notes' tab. This provides a list of all notes attached to an object.

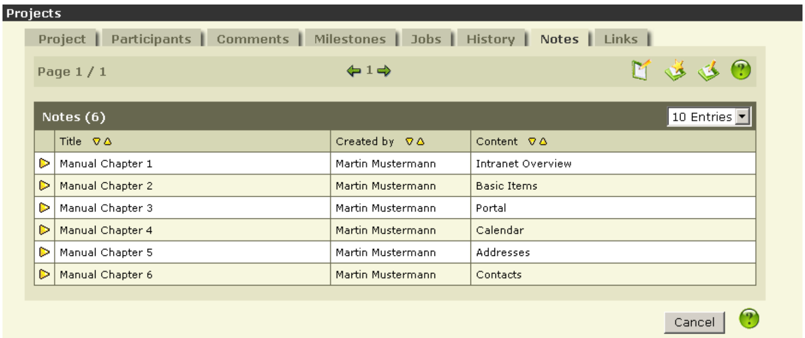


Figure 2.8: *Notes List*

2.4.2 Attaching a Note to an Object

From the notes list, create a new note using the icon  . Then enter the title and content of the note.

You may assign permissions to each note. Use the two options in the upper part of the form to specify who has access to this note. If you choose 'private', only you will be able to see this note. If you choose 'like the associated object', everyone that has access to the parent object also has access to your note.

2.4.3 Removing Notes

Notes may be removed from an object at any time by opening the details page of the note then clicking the trash can icon. When an object is deleted, all attached notes are deleted as well. Also, when a user is removed from the system,

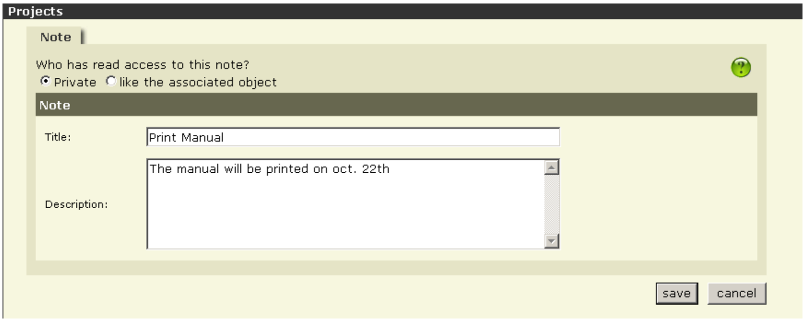


Figure 2.9: *Creating a New Note*

all of his private notes, which were not visible to other users, are removed as well.

Note

Publicly-accessible notes created by a user are not deleted along with the user. The mail administrator replaces the user as the owner of these objects. The administrator can then assign ownership to the appropriate parties using the permission management system. The administrator is also assigned to all jobs delegated to that user. The administrator should reserve the mail administrator account for administrative tasks like reassigning these objects. It is easier to locate the objects that need to be reassigned when all those objects are owned by the administrator.

Note

2.5 Linking Objects

Objects from different areas of the application can be linked together. These additional links help optimize the work process. For example, a project may be linked to different documents. This allows the user to locate documents relating to the project quickly. Linking appointments to projects helps track the time schedule of each project. Objects can be linked to as many other objects as needed.

2.5.1 Creating Links

To create a link between two objects, first open the details page of one of the two objects and select ‘Links’. This opens a table showing links this object has with others. Click ‘activate linking’. Next, navigate to the details page of the second object and open the ‘Links’ tab. Click ‘Create’ to establish the link. Finally, leave linking mode by clicking ‘deactivate linking’.

Creating Group Links — Method 1

To link multiple documents to a project, follow the same procedure as described in Section 2.5.1. However, do not deactivate linking mode. Instead, navigate to the detailed view of another document to link to the chosen project. Select ‘Links’ again and click ‘Create’ to establish the link. Repeat until all desired objects are linked to the project. Then leave linking mode by clicking ‘Deactivate Linking’.

Creating Group Links — Method 2

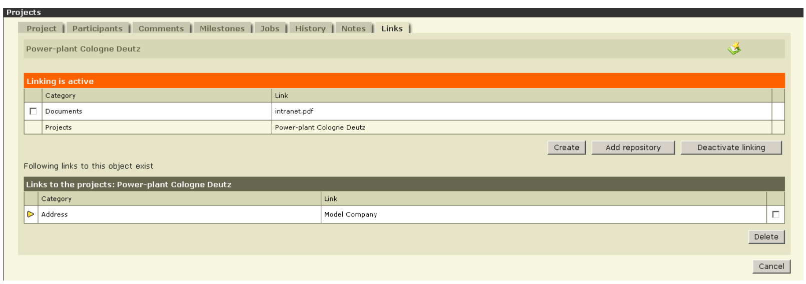


Figure 2.10: *Links: First Object*

There is another way to create a number of links quickly, for example, to link several addresses to a project. First, open an address and select ‘Links’. To create a new link, click ‘activate linking’. The list below ‘Linking is active’ shows the current address to link to other objects. If additional addresses need to be linked to a project, open them as well and select ‘Links’. Click ‘add repository’ to add the elements to the linking repository.

Finally, open the project to which to link the addresses and open ‘Links’. Click ‘Create’ to establish links to all items in the repository. Finally, leave linking mode by clicking ‘deactivate linking’.

Links work both ways automatically. If an address was linked to a project, this link can be seen both on the links page of the project and the contact. Navigate between linked objects by selecting them from the link list.

The target object with which the link should be established does not need to be added to the repository. It is sufficient to navigate to its 'Links' tab and click 'Create'.

2.5.2 List of Links

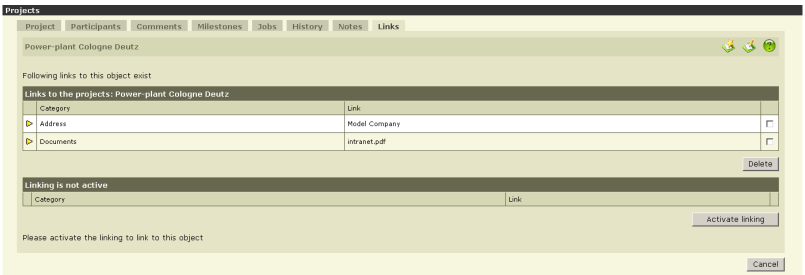


Figure 2.11: *List of Existing Links*

When an object is linked to another, it is added to the list of existing links. View a list of all links an object has to others by opening the details page of the object then opening 'Links'. Follow a link by clicking it.

2.5.3 Deleting Links

A link may be removed again at any time. Open the 'Links' tab of an object to reach a list of all links this object has to others. At the end of each table row for a link, there is a check box. Check the check boxes of links to remove. Delete them by clicking 'Delete'.

Note

When deleting a link, only the link will be deleted, not the object itself.

Note

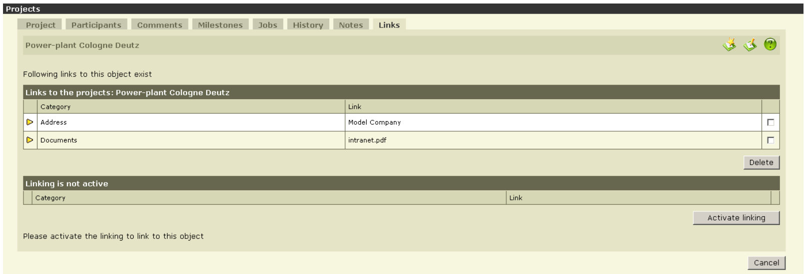


Figure 2.12: Removing Links

2.6 Global Search

Using the global search, objects from each area of the application can be found easily and quickly.

Figure 2.13: Finding Objects of Each Category

2.6.1 Global Search for Objects

The global search can be found in the right section of the page. It consists of two parts. In the upper one, select the area to search from a drop-down menu. Choose from 'Addresses', 'Contacts', 'Projects', 'Documents', 'Appointments', 'Jobs', 'Knowledge', and 'Bookmarks'.

In the lower part, enter the search term. Click 'Go' or press ↵ to start the search.

Using Wild Cards

The search is exact. That means that only those objects that exactly match the search query are included in the results. Searching is case insensitive. You may also use wild cards to search the system. To keep a part of the search term arbitrary, use an asterisk `'*'` as the wild card. For example, performing a contact search for `me*` finds contacts with names like Meyer, Meier, Meeser, Mel, and Metzig.

A question mark `'?'` stands for a single arbitrary character. When looking for `Me?er`, find Meyer and Meier. The wild cards `'*'` and `'?'` can be combined.

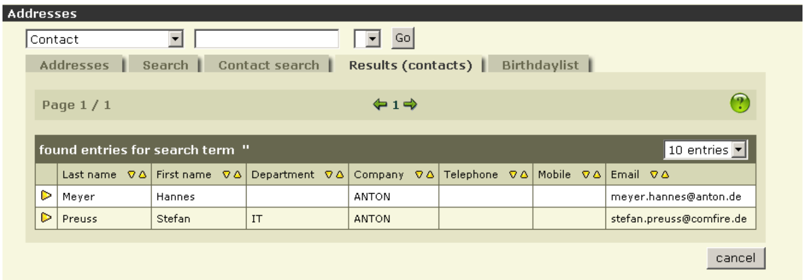


Figure 2.14: Using the Search

2.6.2 Navigating the Search Results

The search results are presented in a list. Access the details page of each entry by clicking the icon or the first entry of each row.

Viewing the Search Results

If a search yields many results, additional pages can be reached by flipping the pages of the search result using and . The number of results displayed on a page is set to a default of `10`. If desired, change this value to `5`, `10`, `15`, or `20` result entries using the drop-down menu in the header bar of the lists.

Sorting the Search Results

If a search query yields a lot of results, it can be sensible to sort the result list according to a certain column. Use and in the title row of each column. Using sorts the results in ascending alphabetical order (from A to Z). Using sorts the results in descending alphabetical order (from Z to A).

2.6.3 Module Overview Drafts

Use the search bar of the calendar, job, and project modules to get a list of all objects matching your search query in the respective module. To make it possible to access search result pages again later, use tab 'Drafts'. Add a title and short description for your search result list. To use this list by default when opening the current module, activate 'Default draft'. Click 'Save Draft' to save your settings.

Additionally, use this dialog to access existing drafts. These drafts are listed in a table view at the bottom of the form. Activate the check box in front of the draft with the search result page to open and click 'Load Draft'. The search result view stored in this draft is then displayed in the 'List' tab.

2.6.4 Module-Specific Search

Get a list of all projects, contacts, jobs, and appoinments of single user or user group in the respective module by using the module-specific search function. Find the search bar's input field below the menu bar in all modules. It consists of two drop-down menus, a text field, and a 'Show' button.

Search for Objects of User Groups

To access projects, appointments, jobs, or contacts of a user group, use this. Use the left menu of the search bar to select the desired user group. To show objects for more users and user groups in this list additionally, simply select them afterwards in the same way. Search results will be added to your result list automatically.

Search for Objects of Other Users

In the same way, it is possible to list projects, jobs, contacts, or appointments of another single user. Insert the name of the desired user into the input field or select the corresponding entry in the right menu, if it is already added to the result list.

Restart Object Search

To start a new search or to return to the modules default view, use the left menu and select 'DELETE'. Your current search result list is emptied automatically. Viewing a list of objects owned by other users is only possible if you have read access to the respective objects.

Show Search Results

Click 'Show' to open the list of all objects in the current module matching your search criteria. The search result view lists the objects of all users already added to the right menu.

2.7 Sending E-Mail from the Groupware

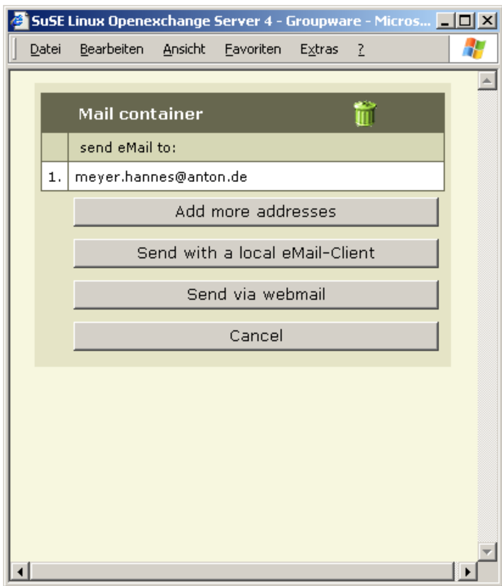


***Figure 2.15:** The E-Mail Container*

You may send an e-mail from the e-mail container to multiple recipients. If you click an e-mail address in the addresses or contacts modules, a pop-up window with options will appear instead of your local e-mail client. In this simple context menu, quickly add additional e-mail addresses by clicking 'Add more addresses'. Additional e-mail addresses that you select while navigating the contacts or addresses pages are automatically appended to the list. Then click 'Send via Webmail' to open the mail editor that you can use to write and send mail using the web front-end.

Optionally, use your local e-mail client instead of Webmail. Click 'Send with a local e-mail client' to pass the collected addresses to an external mail program, like Evolution, Outlook, or Mozilla. Your standard mail program is chosen automatically by the web application.

Portal

After successfully logging in or after clicking the ‘Portal’ icon, access the portal page. It serves as an information board and overview of today’s appointments, jobs, and follow-up projects. Additionally, find out whether someone created new appointments or jobs for you. Current pin board notes or an indication of new or unread e-mail messages can be found on the portal as well.

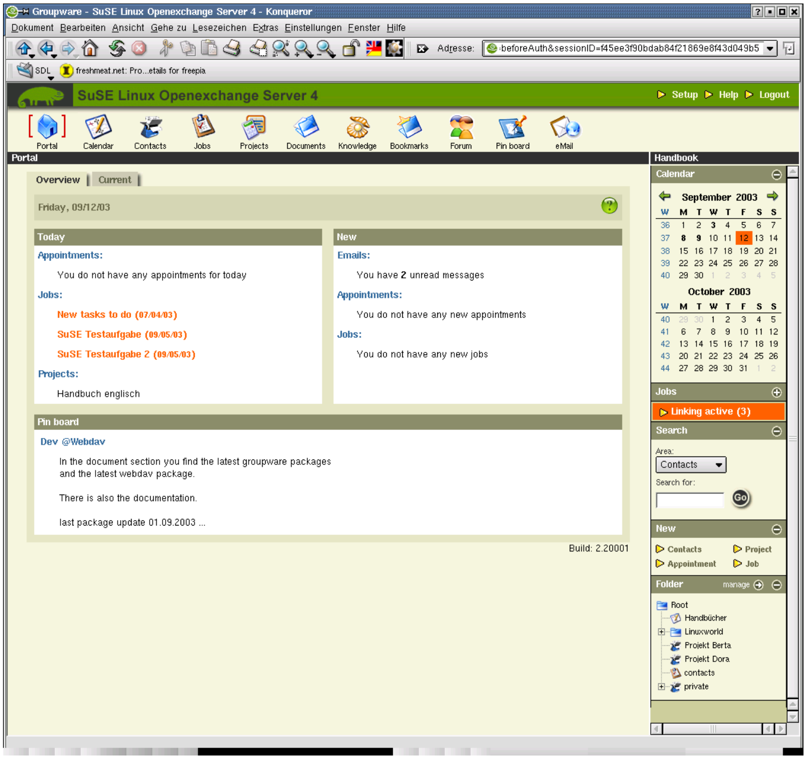


Figure 3.1: The Portal Page of the SUSE LINUX Openexchange Server

The portal page presents up-to-date information about your work and messaging status. See Figure 3.1. In the handbook frame, find some tools that provide quick access to many areas of the application, like the calendar. Below the calendar, see the Search field. First, choose the area to search then enter a search term into the text field. Next is a quick create new object field for creating new contacts, jobs, projects, and appointments.

3.1 Overview

In the 'Overview' area, all up-to-date information relevant to you is displayed. In its left part, the portal page shows today's appointments, jobs, and projects. On the other side, find information regarding newly received e-mail messages, new appointments, and jobs. Directly access detailed information or read new e-mail by clicking the respective entry. The 'Pin board' area gives an overview of all current pin board notes.

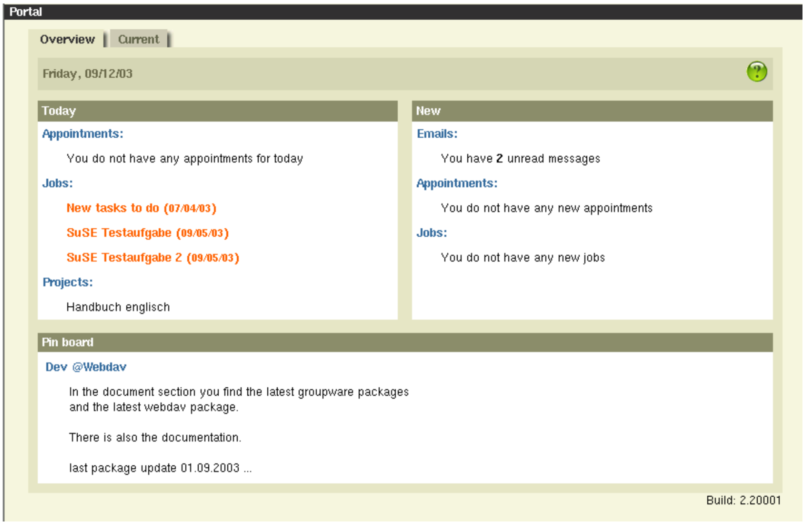


Figure 3.2: *Portal Overview*

3.2 Current — New Items in the Groupware

Click the 'Current' tab to find out about new items that were created during your absence. This page helps if you did not visit the groupware for an extended time. To select a time frame, use the 'New entries' list. From this overview, quickly reach the new items' details pages.

3.3 The Handbook

The handbook consists of shortcuts to the main functions of the groupware and current jobs. In the right frame of the page, see the miniature calendar. It shows the current and next month. The current date is highlighted. See an overview of all your appointments for a certain day by clicking the date. Further information about the calendar and all appointment functions can be found in Chapter 4 on page 43.

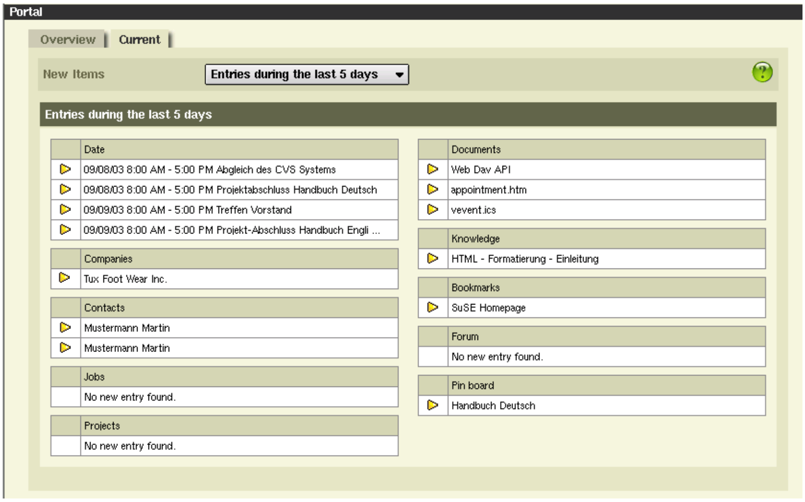


Figure 3.3: List of New Items

To get an overview of your present jobs quickly, use the small job list. Click an entry to open the detailed view of the respective job. Below the miniature calendar, find the groupware's search function. See Figure 3.4. By simply entering a search term, search each module for object entries. Further information about the global search function can be found in Section 2.6 on page 32.

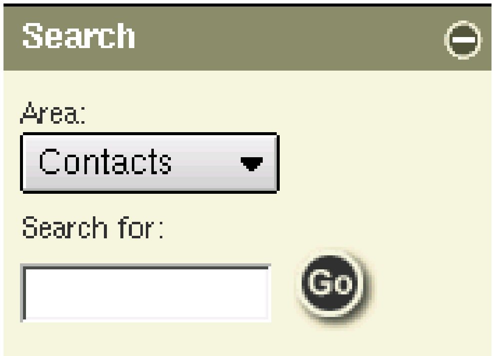


Figure 3.4: *Global Quick Search*

On the portal page, you can quickly create new contacts, company addresses, projects, appointments, and jobs. Simply select the corresponding entry from the lower right part of the page. You will be redirected to the form in which to enter all details of your new object.

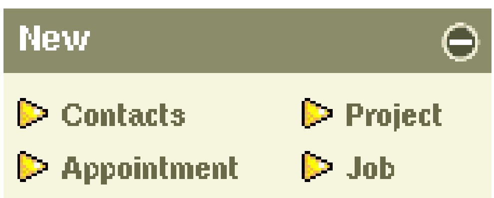


Figure 3.5: *Links to Add New Entries Quickly*

Click 'manage' to open the detailed view of your ISlox folder management. There, create new folders and objects or edit existing ones. You can also move existing subfolders into another existing folder.

Calendar

The calendar can be used to manage your private appointments, group appointments, and resource use. All your group appointments are listed here without the need to incorporate them in the list. Differing calendar views are not needed unless you want to find out about your colleague's appointments. Using the search bar on top of the page, obtain information about any user's appointments. The amount of information visible depends on your permissions in respect to each entry.

4.1 Calendar Basics

After selecting the calendar, its start page opens with a day view of all your appointments.

4.1.1 Navigating

Using the arrows  and , skip one day ahead or backwards.

4.1.2 Viewing Online Help

In every view of the calendar, access the online help by clicking the help icon.

4.1.3 Changing Views

Use the tabs to switch between the day, week, and month views. Access the details of every appointment from each view by clicking the appointment's description.

4.1.4 Adding to the Calendar View

With the aid of the drop-down menus above the tabs, choose all groups, users, and resources whose appointments should be added to the calendar view. If you select a group, all its members are added to the list on the right. Use the text field to search for a user.

4.1.5 Viewing Appointment Information

If you leave your cursor above an appointment entry for a short time, see a summary of the appointment data. The summary contains the start and end date of the appointment and all its participants. To find out more about an appointment, click its entry to reach the details page.

4.2 Day View

In the day view, all appointments to which you have read access are displayed in a white box that spans the appointment's time frame. If you do not have sufficient access to an appointment, its box is transparent (has the same color as the application's background). Next to the appointment's description, icons about the appointment's type are displayed. A reserved appointment is displayed in blue, a temporary appointment in yellow, vacation is marked in green, and, if you are away on business when attending that appointment, it is displayed in red. Appointment sequences are marked with the  icon. Appointments lasting the whole day are listed above the main day view and tagged with . If there are multiple appointments lasting the whole day, they are all listed in this line.

4.2.1 Printing

Using the print icon, print all your appointments for the active date. Clicking the print icon opens a new window in your browser, showing all entries optimized for your printer. Use the print function of your browser to print this list. For example, Internet Explorer provides access to this function with 'File' → 'Print'. The SUSE LINUX Openexchange Server print function is needed for proper output of the list.

4.2.2 List View

Click 'to list' below the date display to reach a list of all appointments for that day. The appointment's description, its location, type, participants, and used resources are listed.

4.2.3 Entering a New Appointment

In the day view, you have several options for entering new appointments. One way is to click the 'Create New' icon. A second way is to click a time in the left border of the day view. This sets the appointment's starting time to the chosen value.

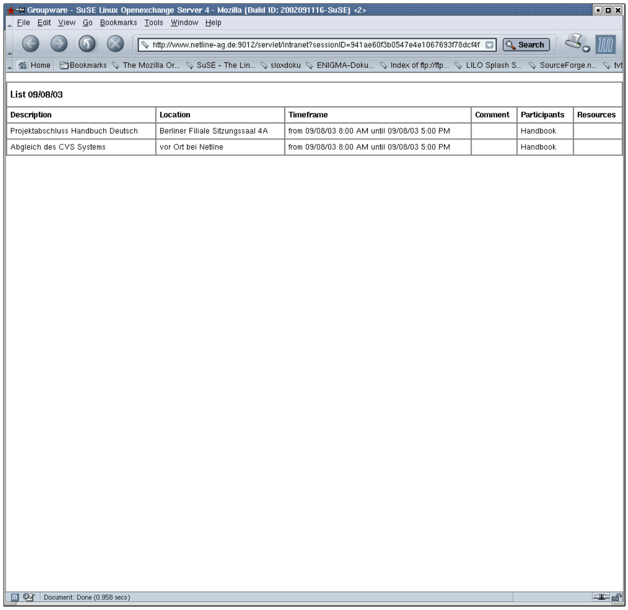


Figure 4.1: *Daily Appointment List Optimized for Printing*

4.3 Week View

In the week view, all appointments in the same week are displayed. Every entry contains the start and end date as well as the appointment's description. If the description is too long to display, three dots are added where it is cut off. The appointment's type is not displayed, but sequences are signified by the corresponding icon.

4.3.1 Printing

Using the print icon, print a list of all found appointments for the active week. Clicking the print icon opens a new window in your browser, showing all entries optimized for your printer. Use the print function of your browser for output of this list. For example, Internet Explorer provides access to this function with 'File' → 'Print'. The SUSE LINUX Openexchange Server print function is needed for proper output of the list.

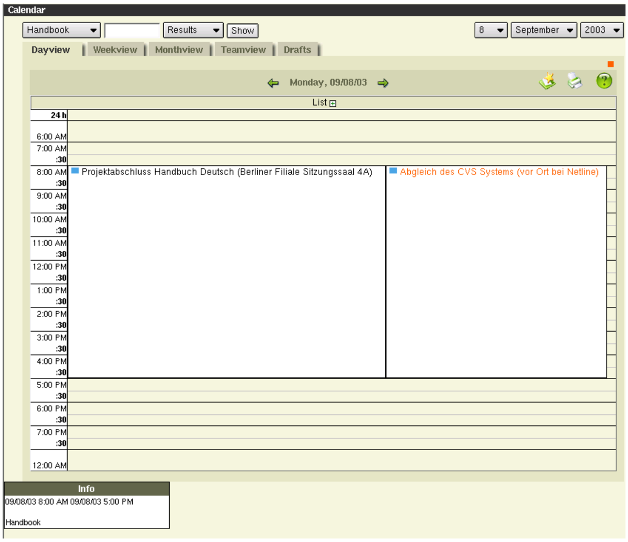


Figure 4.2: *Calendar Day View*

4.3.2 Entering a New Appointment

Enter a new appointment by clicking the 'Create New' icon, . Click a day to create a new appointment with that start date.

4.4 Month View

In the month view, all appointments in a given month are displayed. The start date of an appointment and a rather short part of the description can be seen. Appointments from a sequence are marked with the corresponding icon.

4.4.1 Printing

Using the print icon, print a list of all found appointments for the active month. Clicking the print icon opens a new window in your browser, showing all entries optimized for your printer. Use the print function of your browser to print this list. For example, Internet Explorer provides access to this function with

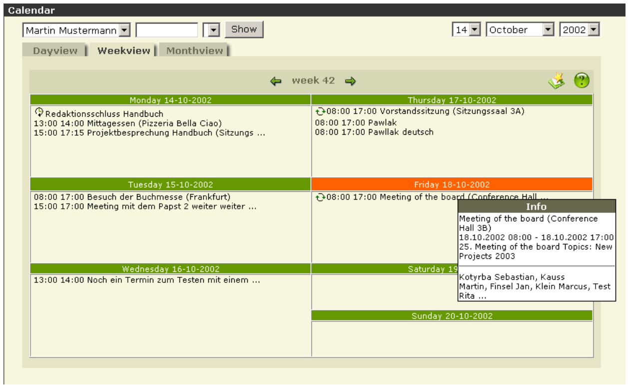


Figure 4.3: Calendar Week View

'File' → 'Print'. The SUSE LINUX Openexchange Server print function is needed for proper output of the list.

4.4.2 Entering a New Appointment

In the month view, create a new appointment by clicking the  icon. To create an appointment for a specific day, click the desired date.

4.5 Team View

On this page, see the team view of the calendar. It provides an overview of all appointments on the corresponding day for previously defined users and resources. Appointments for each user and each resource are displayed in individual daily columns. A maximum of four users or resources can be displayed at one time. Display of more than four columns must be allowed by your administrator. If more than four users or resources are selected, select those to display from a result list by activating check boxes. Use server configuration files to increase the number of columns to view at once to ten.

Using the green arrows on the left and right side of the date, page a day forward or backward. Optionally, specify the date with the form below the menu bar on the right side. To add a new appointment, click the new appointment icon. By

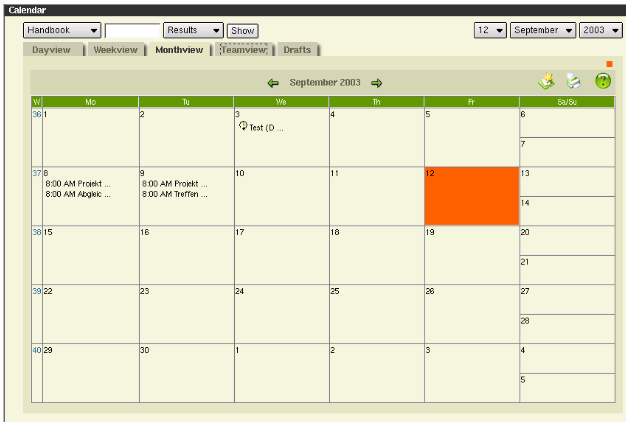


Figure 4.4: *Calendar Month View*

clicking a time in the left section of the calendar, create an appointment starting that day and time. Click the plus icon above the calendar sheet to see a table listing all appointments of this day. To view the details of an appointment, click the colored rectangle in front of the title. The rectangle's color indicates the type of appointment: a reserved appointment is symbolized by a blue rectangle, a temporary appointment by a yellow one, vacation is marked by a green rectangle, and red means you are away on business when attending that appointment. Generally, all appointments are shown in the time zone selected in your setup section. If you change the time zone there, for example, if you are on a business trip, all existing appointments are converted to the new time zone.

4.6 Viewing the Calendar of Colleagues, Groups, or Resources

With the aid of the search bar above the tabs, access the calendars of your colleagues. The search form consists of three fields. From the left field, choose user groups (e. g., Sales, Marketing, Accounting) or resource groups. After selection, the group's members appear in the list on the right side as the result set. Add single users or resources to the result set by searching in the middle text field. Locate users by first or last name or by their login name.

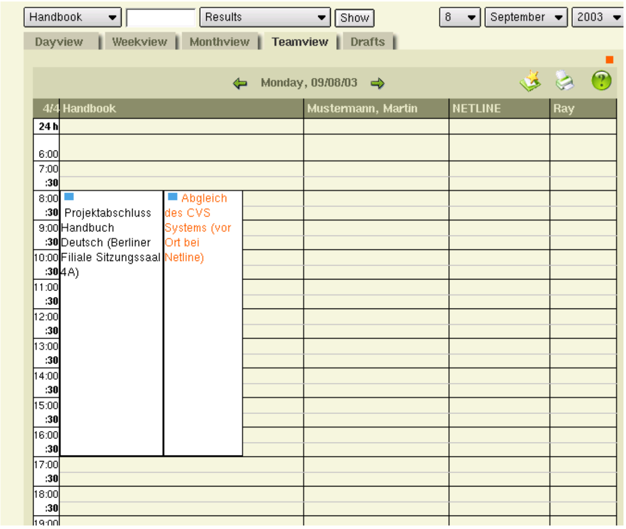


Figure 4.5: Team Calendar View

Note

If you choose another group from the left list before clicking 'Show', the result set in the list to the right is overwritten. If you clicked 'Show', the newly chosen group is added to the result set.

Note

First choose a group whose members should be added to the right list then enter a search into the middle field, not the other way around. If you click 'Show', all appointments from the people and resources in the right list (result set) are displayed.

Note

Appointments to which your colleague did not explicitly grant access are displayed, but you cannot view them in detail.

Note

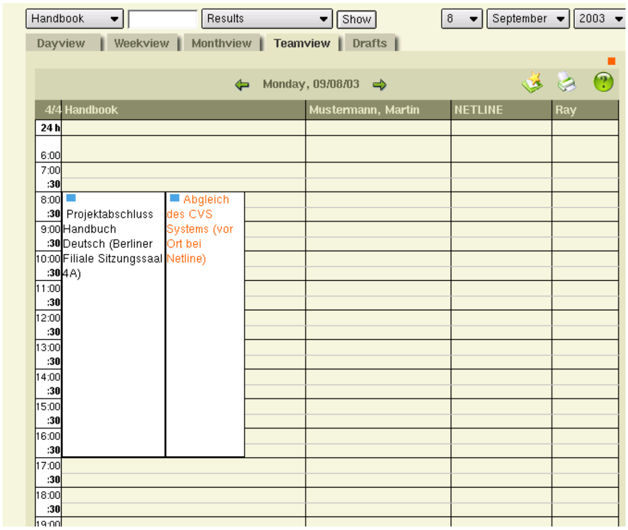


Figure 4.6: Selecting Users and Resources to Show

4.7 Detailed Appointment View

If you click an appointment in any of the calendar views, a page opens containing detailed information about this appointment.

4.7.1 Viewing, Editing, or Deleting an Appointment

Create a new appointment by clicking the 'Create New' icon in the upper right corner of the appointment's details page. If you have write access to this appointment, edit it by clicking the 'Edit' icon. To delete an appointment, click the trash can icon. Confirm the deletion in the next dialog. 'Edit'  and 'Delete'  are only available if you have permission to edit and delete this appointment.

All participants can see a summary of this appointment, including its description, location, time frame, participants, and comments. You may also find out whether this appointment is part of an appointment sequence.

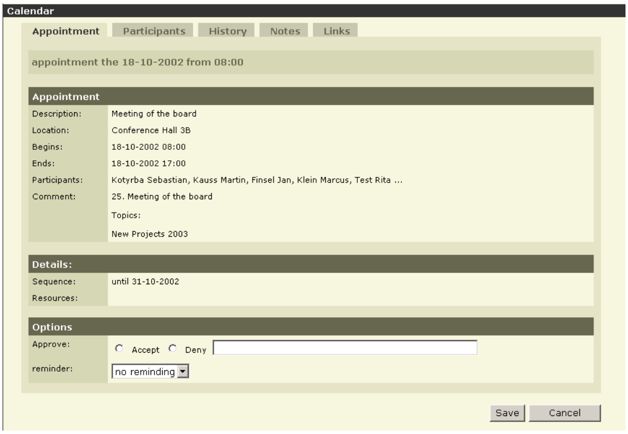


Figure 4.7: *Details Page of an Appointment*

In the lower part of the page, either accept this appointment or decline it. You can add a comment to your choice. This information is added to the participant list.

4.7.2 Appointment Participants

In the participants tab, view a list of this appointment's participants (refer to Figure 4.8 on the next page). This list contains, apart from the participant's names, their states and comments. A participant may have one of three states. If you can see `confirmed` in green letters, the participant saw and confirmed this appointment. If you see `open` written in black, the participant has not accepted or declined this appointment. If you see `rejected` written in red letters, the participant did not accept the appointment.

4.7.3 Appointment History

With the 'History' tab, see an overview of when this appointment was created and when it was last changed. Also see who created it and who last changed it. See Figure 4.9 on the facing page.

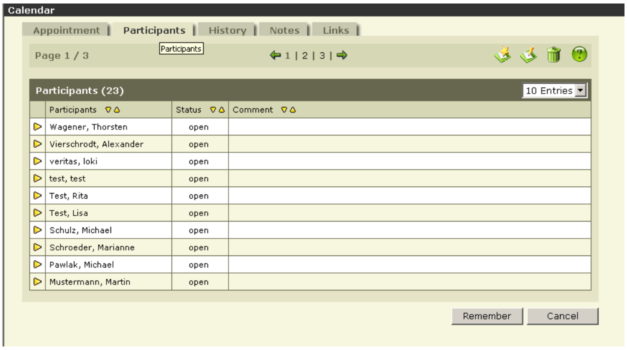


Figure 4.8: View of an Appointment's Participants

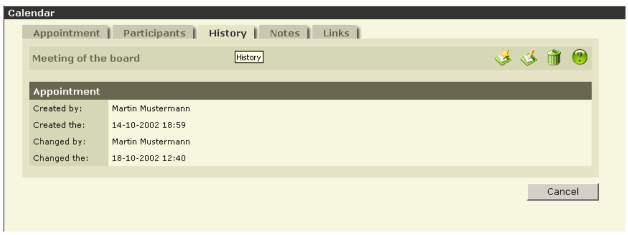


Figure 4.9: Appointment History

4.7.4 Appointment Notes

You can attach notes to this appointment. All notes are listed on the 'Notes' tab. Click to view a note. Sort the list of notes according to field by clicking the arrows next to 'Created by', 'Title', and 'Content'.

To write a new note, click . A dialog opens in which to enter the note's title and content. Also specify whether this note can only be seen and edited by you or by everyone that can see and edit the parent object.

4.7.5 Appointment Links

Links may be added to each appointment. Follow the instructions given in Section 2.5 on page 29.

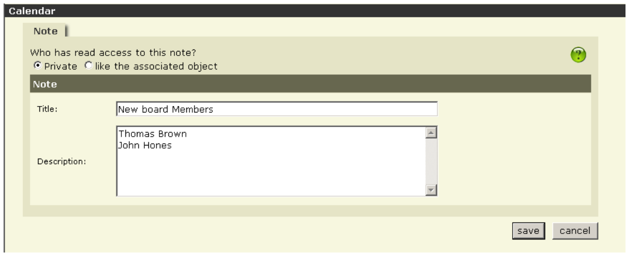


Figure 4.10: *Appointment Notes Overview*

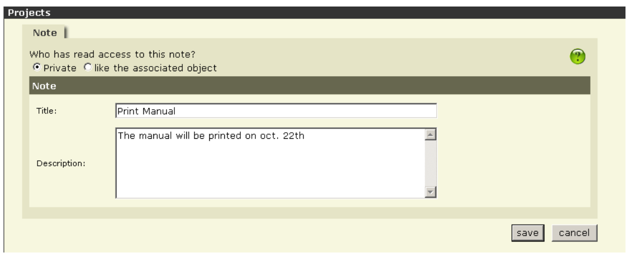


Figure 4.11: *Attaching a Note to an Appointment*

4.8 Creating an Appointment

4.8.1 Defining the Appointment

To enter a new appointment, there are a few mandatory fields that must be completed. The mandatory fields for creating a new appointment are description, appointment beginning, and appointment end.

The beginning and end are automatically completed depending on how you accessed the creation form. Typical ways would be clicking a certain date in the day, week, or month views (refer to Sections 4.2 on page 45, 4.3 on page 46, and 4.4 on page 47). Only after the description is completed can other tabs be selected to define additional aspects of this appointment.

4.8.2 Private and Group Appointments

In the 'Appointment' tab, specify whether this appointment is a private or a group appointment. Select the desired options.

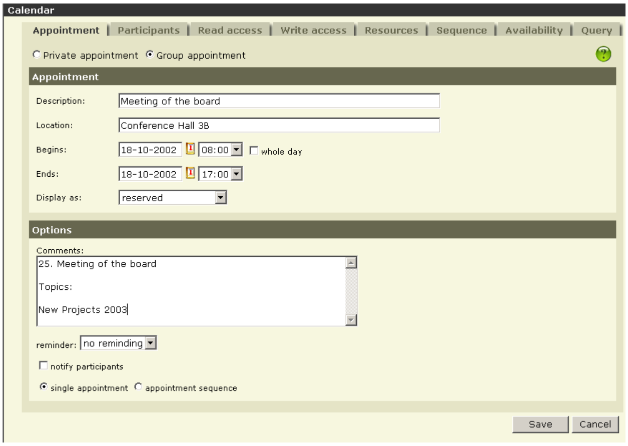


Figure 4.12: *Creating a New Appointment*

Private Appointment

When creating an appointment, the 'private appointment' option is chosen by default. If you do not want to grant any colleague access to this appointment, simply leave this option enabled. Click 'Save' to confirm all settings.

Private Appointment Others May Access

In this case, 'Private appointment' is again selected. To grant read or write access to your colleagues, add them to the respective lists in the read and write access sections. Additional information and an example can be found in Section 4.8.2 on the next page.

Tip

If you give someone write access, he is automatically granted read access.

Tip

Group Appointment — You Participate

If you create a group appointment in which you take part, select the 'Group appointment' option. Immediately after completing the main form, switch to the participants form. You will then automatically be added to the list of participants. Continue by selecting the other participants and distributing read and write access to this appointment. Participants are automatically granted read access.

Group Appointment — You Do Not Participate

When creating a group appointment in which you do not participate, do not select the 'Group appointment' option. Assign participants to this appointment and specify all permissions for it. Default is read permission for all participants, write permission only for the creator. As the creator, you have write access until someone else with write access changes it.

Example: Secretary Function — Creating Appointments for Others

Use this to create private appointments for other people. If a secretary need only create an appointment, select 'private'. In 'Participants', select the person for whom to create the appointment. The 'Group appointment' option is now automatically activated. Participants are given read access. The secretary of our example need not be added to the participants. If participants should be able to edit this appointment, they must be granted write access. The secretary keeps write access to this appointment until someone changes it. If the secretary needs write access even after someone changed this appointment, he must be added to the list for write permissions.

Caution

The creator of an appointment in principle keeps the permission to change an appointment until someone else changes the appointment. If you accidently change a 'group appointment' into a 'private appointment', only the participants are removed from the appointment. Access permissions remain untouched. In this way, the original participants may still see this appointment. This would not be the case if the permission lists were cleared as well.

Caution

4.8.3 Entering Other Appointment Data

Description

Enter a short description of this appointment into this field. Entering a description is mandatory.

Begins the, Ends the

Enter the appointment data here. Enter the date directly or use the integrated calendar by clicking the calendar icon. Click the desired date to close the calendar. The chosen value is then entered in the text field. In the calendar, flip the pages with the arrow icons. Use the drop-down menu to specify the start and end time of this appointment. If this appointment lasts the entire day, check the corresponding check box. The start and end time are ignored in this case. Appointments lasting the entire day are created for all days between the start and end date.

When saving an appointment, the system checks whether the new or modified appointment overlaps other appointments. This check is skipped for appointments lasting the whole day. Additional information about the conflict management system is available in Section 4.8.9 on page 62.

Display as

Select the appointment type from the drop-down menu. Depending on your choice, the appointment is marked differently in the day view. Possible settings include 'Booked', 'temporary', 'Away on business', and 'Vacation'.

Comments

Add additional information to the comments field.

Reminder by Mail

Choose whether to be reminded of this appointment by e-mail. If a reminder is desired, also set when it should be sent. Every participant that has read access to this appointment can specify for himself when and if a reminder should be sent.

Notify Participants

If you check this, all participants of this appointment are notified by e-mail of the changes made or their new appointment. You should activate the notification if you changed important appointment data. If another internal user of SUSE LINUX Openexchange Server opens the notification with the SUSE LINUX Openexchange Server webmail client, a new pop-up window opens, giving the possibility to accept or decline your new appointment.

4.8.4 Selecting Participants

If this appointment is a group appointment, add its participants and participating groups to the appointment. Assigning participants to an appointment works like assigning object permissions, explained in Section 2.3.1 on page 22.

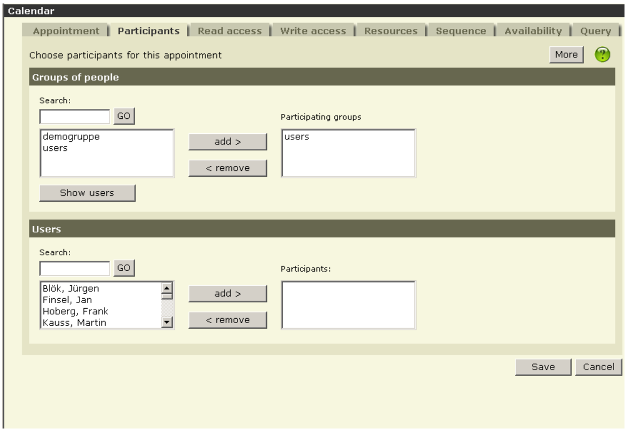


Figure 4.13: *Selecting Participants*

4.8.5 Assigning Read and Write Permissions

Assign read and write access to an appointment as described in Section 2.3.1 on page 22. By default, all participants are granted read access. Write access is usually reserved to you. If desired, write access can be granted to additional people.

4.8.6 Assigning Resources

You may assign the needed resources to an appointment as well. Assigning resources works as described in Section 2.3.1 on page 22. Like adding people for access to the appointment, resources and resource groups may be added.

4.8.7 Creating an Appointment Series

If this appointment is part of an appointment sequence, this can be specified in the sequence tab. You have several possibilities for specifying the sequence's interval.

No Sequence If this interval is specified, only one appointment is created. This is the default setting.

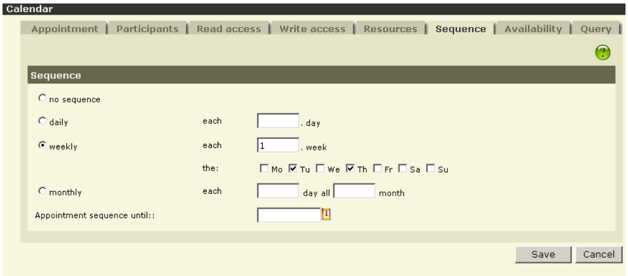


Figure 4.14: *Creating a Sequence*

Daily If you specified this interval, the appointment is repeated after the specified number of days has elapsed. When later editing a sequence, this choice may not be changed. Changing from 'daily' to 'weekly' or 'monthly' is not possible.

Weekly Select this option for appointments that recur weekly. If you select an interval of three weeks, the appointment is created every 21 days. Additionally, specify on which week day the appointment should occur. Simply activate the corresponding option. When later editing a sequence, this choice may not be changed. Changing from 'weekly' to 'daily' or 'monthly' is not possible.

Monthly If the appointment recurs after a certain number of months, choose this option. Enter the day of month in the first text field and the number of months that pass between each appointment in the second field. When later editing a sequence, this choice may not be changed. Changing from 'monthly' to 'daily' or 'weekly' is not possible.

After selecting an interval, set up to which date the sequence runs. Enter the date directly or use the integrated calendar by clicking the calendar icon. Simply click the desired date to close the calendar. The chosen value is entered into the text field. Appointment sequences are not checked for conflicts with existing dates when created. Newer appointments, however, cause a conflict when overlapping with an appointment from the sequence. Additional information about the conflict management system can be found in Section 4.8.9 on page 62.

4.8.8 Checking Availability

Use this tab to find out whether all participants and resources are available on the chosen day. The availability is checked for an entire day.

Figure 4.15: Checking the Availability

Selecting a Time Frame

Choose the examined time frame with the text field and the drop-down menus. Enter the date directly or use the integrated calendar. Also specify whether availability should be checked for participants, needed resources, or both. Click 'Check' to start the analysis.

Reading the Availability Analysis

Once the analysis has been completed, see a tabular overview in which to determine whether all participants and resources are available on the given day and time.

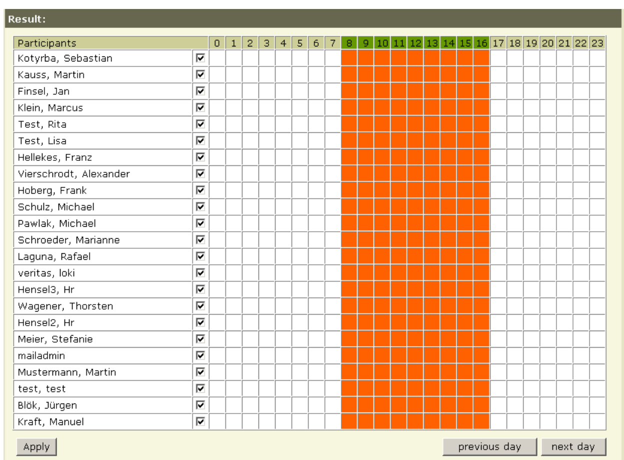


Figure 4.16: Determined Availability of Participants and Resources

A list breaks down the availability by hour and participant or resource. The table is coded in different colors to make it easier to read.

red participant has an appointment during the checked time frame

green participant does not have an appointment in the checked time frame

gray participant is not available outside the checked time frame

white participant is available outside the checked time frame

Exclude someone from the appointment by unchecking the check box in the same row then clicking 'Apply'. Using the buttons below the table on the right side, repeat the search for the 'next day' or the 'previous day'.

Performing a Query

To check for the availability of people and resources over an extended period, perform a query. The system then looks for suitable appointment dates and times and gives a calender overview of possible dates.

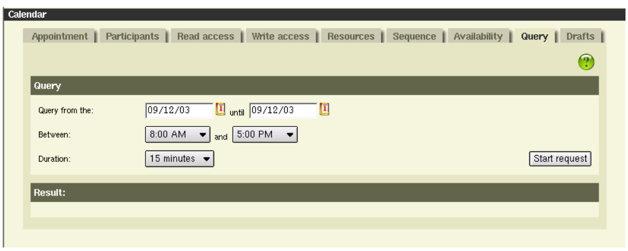


Figure 4.17: Querying the System

Enter a start and end date for the query or select it with the calendar. The given time frame is examined in the query. To specify the period of the query, select a start and end time from the drop-down menus. Also select the duration of the appointment. All possible starting times in the queried time frame are displayed in green. Times that lead to a conflict are marked in red. Times outside the specified time frame are checked as well. White blocks correspond to green blocks and grey blocks have the same significance as the red blocks. A maximum of 31 days can be checked in a query.

Click the desired start time to adapt the appointment data in the 'Appointment' tab.

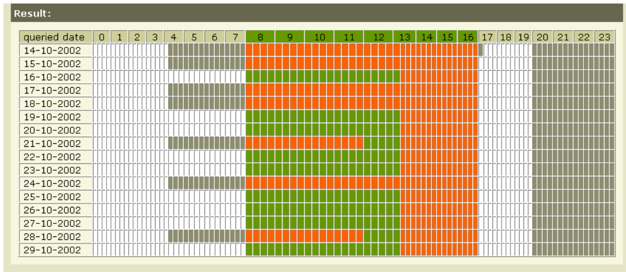


Figure 4.18: *The Result of a Query*

4.8.9 Conflict Management

When saving an appointment, the system automatically checks whether it overlaps with another appointment. To keep the overview simple and concise, this check is skipped for appointment sequences. When creating single appointments, a conflict check is performed, including for an overlap with an appointment from a sequence. Appointments lasting the whole day are also not included in the conflict management.

All conflicts will be listed, as well as conflicts in the use of resources. If a resource is already in use at a given time and date, the conflict is also listed on the conflict page. If desired, ignore the conflict and create the appointment anyway. To do so, click 'Ignore conflicts and save'.

To resolve the conflict, either query the system to find an alternative date and time by clicking 'Start query' or click 'Back' to return to the creation form. To cancel this appointment's creation, click 'Cancel'. All changes made will be lost.

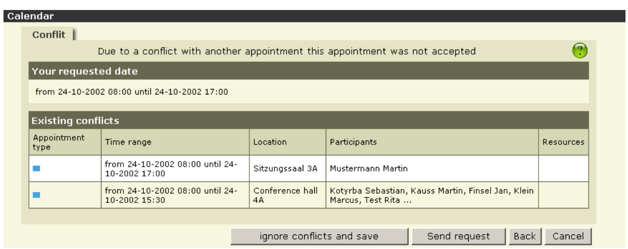
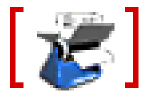


Figure 4.19: *Conflict Management*

Contact Management



The contact management is used to manage contacts and their corresponding company addresses. Search for a contact or company address using diverse search criteria. It is also possible to add any number of links and notes to a contact.

5.1 Contact Overview

Once opened, the contact module provides an overview, listing all contacts you are allowed to read and access. If you did a contact search, all results matching your inquiry are listed. To sort by last name, first name, department, telephone, or e-mail, click the arrows to the right of those column headers in the contact list. The direction of the arrow next to the label indicates the sort direction. Press for an ascending sort. Press for a descending sort. Specify how many items should be displayed on each page using the drop-down menu on top of the table. Define the kind of entries to list using the second drop-down menu on top of the page. Choose internal or external contact lists or lists of both kinds of contacts. By clicking the green arrows on top of the page, turn the pages. Alternatively, just click the number of the page to display. To see all information about a contact, click its name or the yellow arrow in the first column.

Using the tabs, access forms with which to perform a more detailed 'Company search' or 'Contact search'. Use 'Company' to access a list of all company entries. Browse this list in same way as the contact list. Use 'Birthdaylist' to open a list of all available birthday entries.

Using the print icon, print a list of all contacts or companies found. Clicking the print icon opens a new window in your browser, showing all entries optimized for your printer. Use the print function of your browser to print this list. For example, Internet Explorer provides access to this function with 'File' → 'Print'. The SUSE LINUX Openexchange Server print function is needed for proper output of the list.

5.2 Searching Contacts

To find a specific contact, use the global search bar or perform a detailed search. Additionally, you can list contacts by initial letter.

5.2.1 Global Search

Using the search field below the calendar shown in the handbook frame, find company addresses and contacts. More detailed information regarding the global search option can be found in Chapter 2.6 on page 32.

5.2.2 Search for Internal Users

Using the search field below the menu bar, look for internal users. It consists of two drop-down menus and a text field. First, select the search criteria from the left menu. Look for internal users or internal groups by name, login name, or first and last name. Below the dashed line, find all user groups. If you choose a user group, only that group is searched for internal users. After selecting the search criteria, enter a search term into the text field and press Enter. Wild cards, like `'*'`, can be used. The results are then listed in the drop-down menu to the right. This search for internal users is additive. If you select another group in the first box, the results of this group are added to the original results. To clear your internal user results, click 'DELETE' in the first drop-down menu.

You may not change the information about a system user in the groupware. Use the administration interface of the server. For additional information, consult the help page of the page displayed.

5.2.3 Initial Letter Lookup

Figure 5.1: *Lookup via the Initial Letter*

In the 'Contacts' tab of the 'Contacts' area, select the initial letter of contacts to list. See Figure 5.1. Click 'All' for a list of all contacts.

5.2.4 Detailed Search

An elaborate search form can be found in the 'Contacts' module in the tab 'Contact search'. Search for entries based on the value of particular fields. This can be the associated company name, its address (street, city, and country), or the e-mail address. Also search for ranges of postal codes, the telephone number, or any other entry. Using wild cards, like `'*'` and `'?'`, is possible as well. The postal code search is always for a range of postal codes. Enter only a single value for an exact match. Using this form, also look for a range of creation and modification dates. To do so, select the desired date with the calendar icon and the mouse.

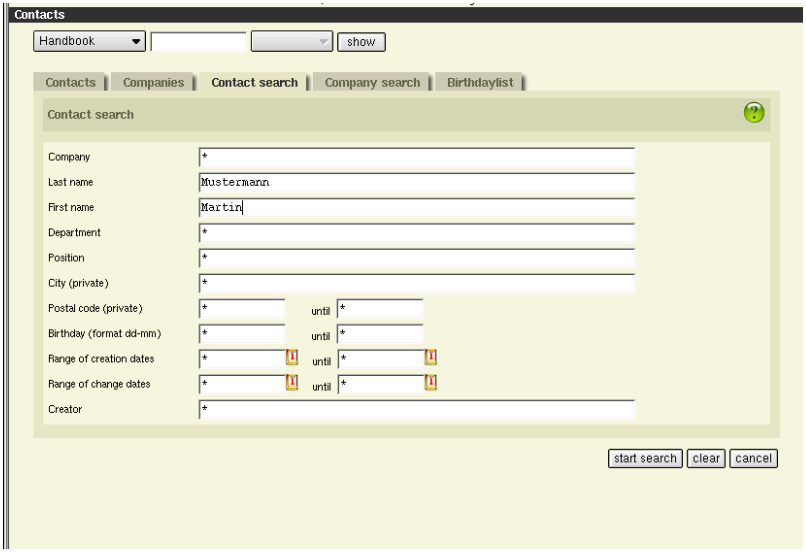


Figure 5.2: Detailed Search for Contacts

5.2.5 Birthday List

Click 'Birthdaylist' to open a list of all contacts with a birthday entry. The contact search also allows generation of special birthday lists. This type of list is generated each time you enter a value in 'Birthday'. If desired, combine this with other search criteria. In this case, the search fields 'City' and 'Postal code' are matched against the private address information of the contact. To see a list of all birthdays in October, for example, choose a time frame starting `01-10-03` and ending `01-10-03`.

5.3 Viewing a Contact

The easiest way to find a specific contact is using the global search as described in Section 2.6 on page 32. Then select the desired entry to access its details page.

Another way to locate a contact is by finding the corresponding company then viewing its details. On the first page below 'Address', a list of all contacts affiliated with the company can be found. Only contacts to which you have read access are listed. See Section 2.3.1 on page 22. View detailed information about a contact by selecting its entry.

5.4 Creating a New Contact

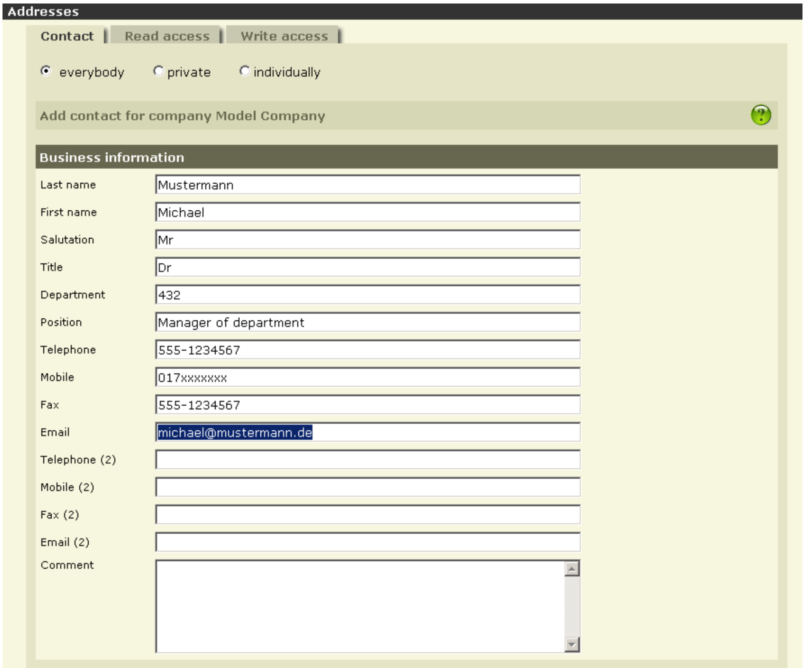


***Figure 5.3:** Creating a New Contact*

To create a new contact, click 'New'  in the upper part of the list page of contacts. Alternatively, click 'New' in the detailed view of a contact to create a new contact.

5.4.1 Entering Details

The following fields are available for contact details.

First and Last Name, Salutation, and Title Specify the appropriate data. 'Last Name' is mandatory.

Department, Position Enter the data that describes the position of the contact in the respective company.

Telephone, Mobile, Fax, E-Mail Enter the appropriate contact information. It is also possible to specify a second telephone number, mobile phone number, fax number, and e-mail address. The fields are available both for business and personal information.

Street, Postal Code, City, State, Country Enter the private address of the contact here.

Comments Use this section to enter additional information about the contact.

Marital status, Number of children, Birthday, Hobbies This section is used to store personal information about the contact. 'Birthday' is a date field. Enter the contact's birthday in the date format MM/DD/YY. Alternatively, select the date using the built-in calendar by clicking the corresponding icon. A window containing a calendar opens in which to click the desired date.

URL If this contact has a home page, enter the address here.

5.4.2 Permissions

Permission options are private, accessible by all users ('everybody'), or only for chosen groups or people ('individually'). If you choose 'everybody', the address entry is added to the global LDAP address directory to which all groupware users have access. 'private' adds the address only to your private address book. When 'individually' is selected, additional settings are required. Use 'Read access' and 'Write access' to specify to whom read or write access should be granted. You can use tab 'Write access' to select the owner of a contact. This user will be the only one allowed to delete a contact. Is you to use existent write permissions as deleteright as well, select listbox entry 'Like write access'.

After assigning read and write permissions for the new contact, you can store this setting as a draft. To do so, simply click 'drafts'. In 'title' assign a name for the new draft. In description, add a short comment regarding the settings to store in this draft. To use the new draft as the standard draft for all new contacts, activate the 'Default draft'. To save the draft, click 'Save'. Existing drafts for the contact module are displayed in a list at the bottom of the form. To assign an existing draft to a contact, simply click the draft in the list or select the corresponding entry in 'draft' under the 'contact' tab. Drafts are are stored and organized for each module section separately, so you cannot use drafts of the contact module in the project module.

A contact may have different permissions than an associated company. If access to a company address is more restricted than access to a contact address, the contact may only be reached with the global search and not via the company address.

More information about permission management can be found in Section 2.3.1 on page 22. Click 'Save' to save the new contact.

5.5 Modifying Contact Information

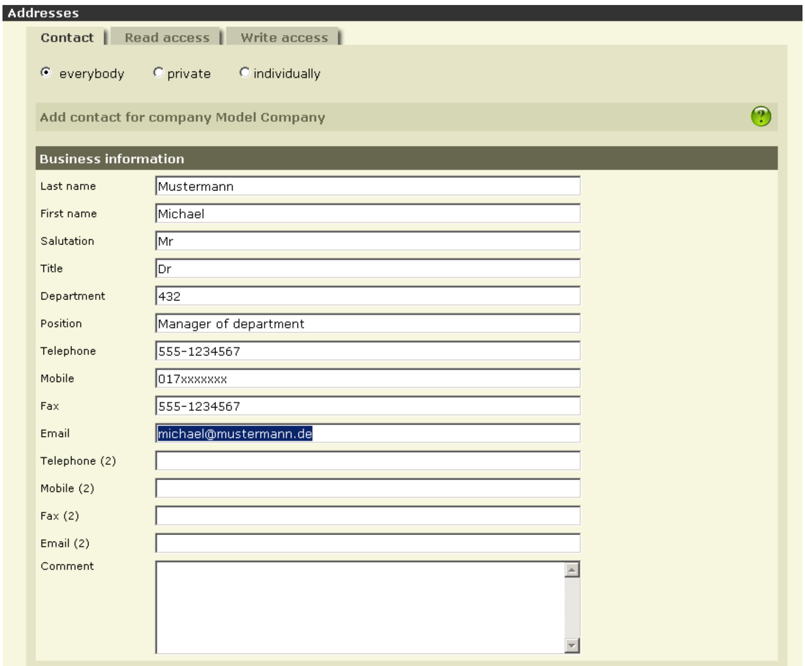


Figure 5.4: *Editing an Existing Contact*

Open the detailed view of the contact to edit then click the 'Edit' icon. This is only available if you have write access to the contact. The form for modifying a contact matches that used for creation, allowing both details and permissions to be edited. Refer to Section 5.4 on page 67 for information about this form.

To save your changes, click 'Save'. To leave without saving changes, click 'Cancel'.

5.6 Deleting a Contact

To delete a contact, locate it and open its details page. There, delete the contact by clicking the trash can icon. If you are sure you want to delete this entry, confirm the deletion by clicking 'Delete'. To abort the process, click 'Cancel'. (See Figure 5.5)

Appropriate permissions are required to delete an item. More information about the permission management for contacts can be found in Section 5.4 on page 67. A more general overview of the permission management system can be found in Section 2.3.1 on page 21.

Figure 5.5: Deleting a Contact

5.7 Exporting a Contact

To export contact data to an external program, open the detailed view of a contact. Click 'vCard' to open an overview of the contact information to save as a vCard. Click 'download' to open the entry. To save it in a file, click 'Download' then choose the folder in which to save the vCard and modify the file name. The downloaded data is saved in VCF format. This allows you to use this contact in your local e-mail client later.

If you click 'Open', the data of the vCard is displayed in the address book of your mail client. View the data and, to export it to your address book, save the entry.

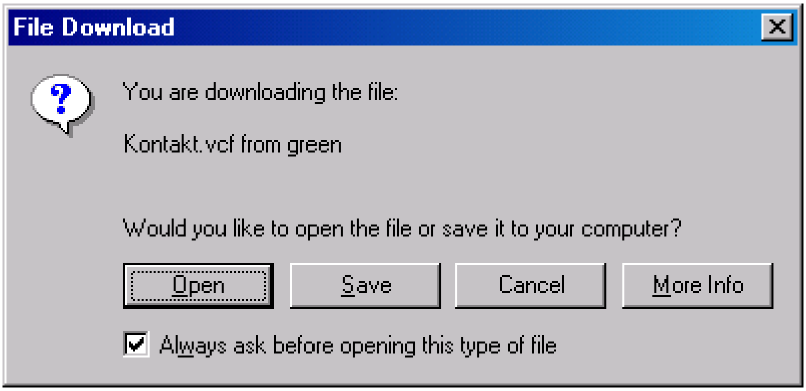


Figure 5.6: Exporting Contact Information as a vCard

5.8 History

In the details page of a contact, a 'History' tab is available. It provides information about which user originally created this entry and when it was created. Additionally see when the last changes were saved for this contact and which user made them.

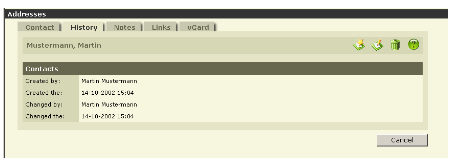


Figure 5.7: History for a Contact Entry

5.9 Contact Notes

To attach short comments and information to a contact, select 'Notes' from the details page of the contact. This also shows all existing notes. Click the 'Add new' icon to create a new note.

Note permissions are managed separately, so it is possible to attach a private note to a public address. More about notes is available in Section 2.4 on page 28.

5.10 Linking Contacts to Other Objects

Contacts can be linked to addresses, other contacts, jobs, projects, bookmarks, and forums. First, select 'Links' from the contact's details page. All links already present are listed on this page.

Create a link by clicking 'activate linking' then navigating to the details page of the target object. Choose 'Links' there then click 'Create' to establish the link. To leave the linking mode, click 'deactivate linking'. More information about linking is available in Section 2.5 on page 29.

5.11 Company Addresses

With the contact management, manage contacts and their corresponding companies. Click 'companies' to get a list of all companies. On this page, see an overview of all company addresses that match your search criteria. If you did not perform a search beforehand, all companies are listed here. Change the ordering of the table by clicking one of the yellow arrows (upward for ascending, downward for descending) in the table's head. Specify how many items should be displayed on one page using the drop-down menu on top of the table. By clicking the green arrows on top of the page, turn the pages. Alternatively, click the number of the page to display. To see all information about a company, click its name or the yellow arrow in the first column. To add a new address click the new address icon (sheet with star).

Using the tabs, access forms with which to perform a more detailed company search and contact search. Using the print icon, print a list of all contacts found. Clicking the print icon opens a new window in your browser, showing all entries optimized for your printer. Use the print function of your browser to print this list. For example, Internet Explorer provides access to this function with 'File' → 'Print'. The SUSE LINUX Openexchange Server print function is needed for proper output.

5.11.1 Searching Addresses

There are several methods available for locating a particular company in the address book.

Global Search

The global search can be found in the handbook frame. Additional information about the global quick search is available in Section 2.6 on page 32. Enter a search term into the global or quick search. The query is applied to the company name and location. Wild cards can be used. The search is case insensitive.

Initial Letter Lookup

Figure 5.8: *Lookup via the First Letter*

In the 'Companies' tab of the 'contacts' module, select the initial letter of a company name or view a list 'All' addresses. Refer to Figure 5.8.

Detailed Search

An elaborate search form can be found in the 'contacts' module in 'Company search'. It is shown in Figure 5.9. Search for entries based on the value of particular fields. This can be the company name, its address (street, city, and country), or the general e-mail address. Also search for ranges of postal codes, the telephone number, or any other entry. Using wild cards like `'*'` and `'?'` is possible as well. The postal code search is always for a range of postal codes. Enter only a single value for an exact match. Using this form, also look for a range of creation and modification dates. To do so, select the desired date with the calendar icon and the mouse.

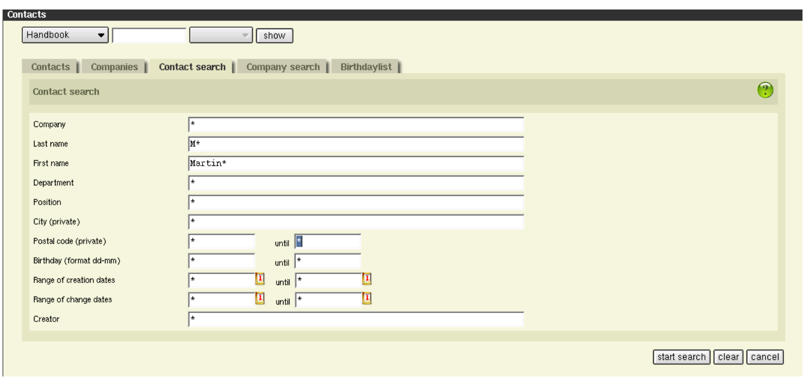


Figure 5.9: *Detailed Search for Company Addresses*

Searching with the Magic Bar

The “Magic bar” is an integral part of the ‘contacts’ module and contains an optimized version of the global search. Select a desired index to search from the left list.

To locate colleagues, select the ‘internal user’ catalog and start your search by entering a search term in the middle text field. The system also allows you to view internal users by groups. Select a group to have its members listed on the right side. All groups are listed below the dashed line.

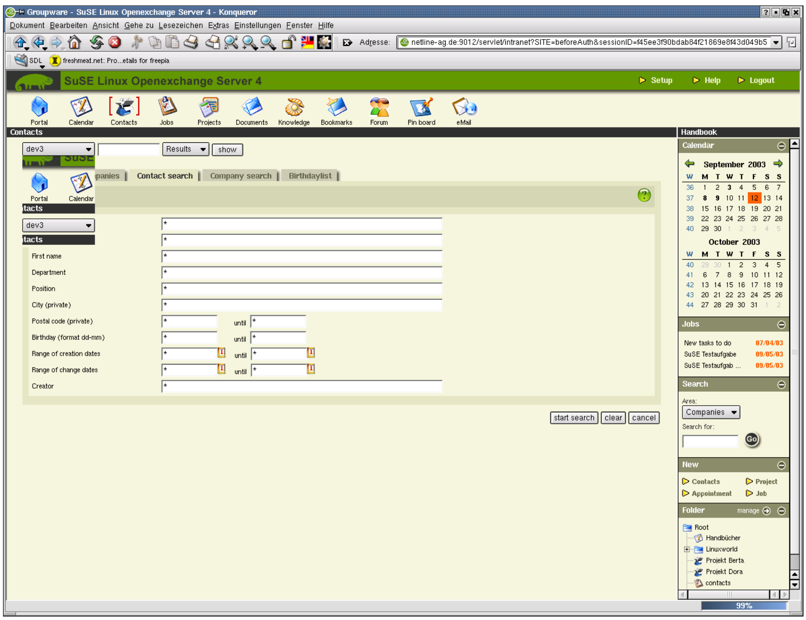


Figure 5.10: Searching with the Magic Bar

5.11.2 Creating a New Company Address

Create a new address using the ‘Create new’ menu on the portal page (see Section **??** on page ??) or using ‘New’ in the address module. Enter all details for the address there. Figure 5.11 on the facing page provides an overview of all available fields. ‘company’ is a mandatory field. After entering all values, set the access permissions to this address before saving your entries.

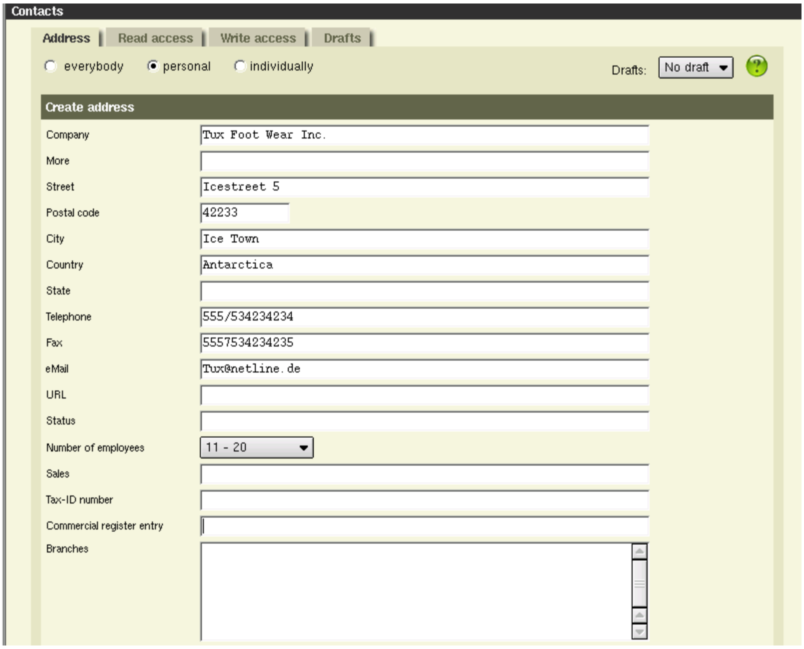


Figure 5.11: *Creating a New Address*

Permission options are private, accessible by all users (‘everybody’), or only for chosen groups or people (‘individually’). If you choose ‘everybody’, the address entry is added to the global LDAP address directory to which all groupware users have access. ‘private’ adds the address only to your private address book. When ‘individually’ is selected, additional settings are required. Use ‘Read access’ and ‘Write access’ to specify to whom read or write access should be given.

More information about the permission management can be found in Section 2.3.1 on page 22. Click ‘Save’ to save the new address.

5.11.3 Editing an Address

To modify an address, locate the desired address and open its details page. An example of this view is shown in Figure 5.12 on the following page. Click ‘Edit’  to switch to editing mode. The button is only visible if you have write access to the address. The form is the same as the one used for creating an address

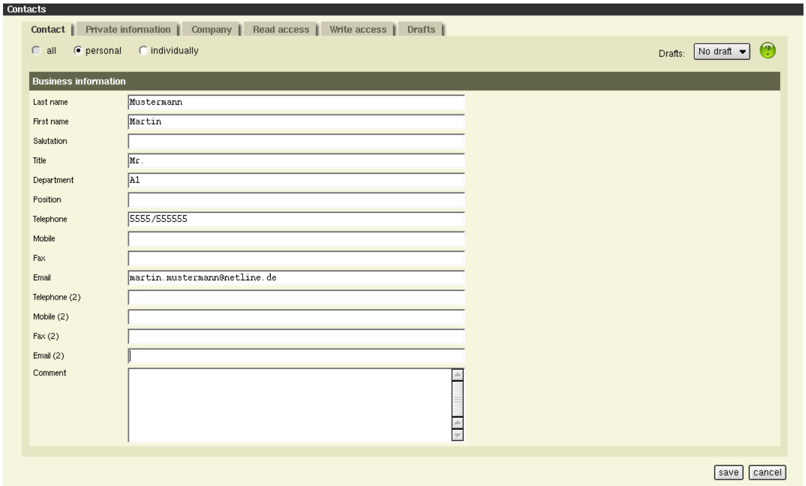


Figure 5.12: *Detailed Company Address View*

and can be used to modify both the address and the permissions. The 'company' field must be completed. If contacts are attached to a company address, editing can only be done using the detailed view of a contact entry.

To save the changes, click 'Save'. To discard all changes, click 'Cancel'.

5.11.4 Deleting Companies

To delete an address, first open its details page. Click 'Delete'  . It is only available if you have write access. Confirm the deletion in a window like Figure 5.13 on the next page. Press 'Delete' to delete or 'Cancel' to abort. If contacts are attached to a company address, the company can only be deleted after all contacts regarding the address have been detached.

Figure 5.13: *Delete Address Confirmation*

Jobs

Use the job management to plan your activities in a very concise way. Additionally, you may assign jobs to other users or groups. Different job lists are available, such as lists of project jobs or delegated jobs. Jobs can be assigned a status. Finished jobs that have a status of `Done` can be moved to the archive by their creator or someone with write access. Jobs may also be assigned to a project. As in the other modules, it is possible to attach notes to jobs and link them to other objects.

6.1 Job Overviews

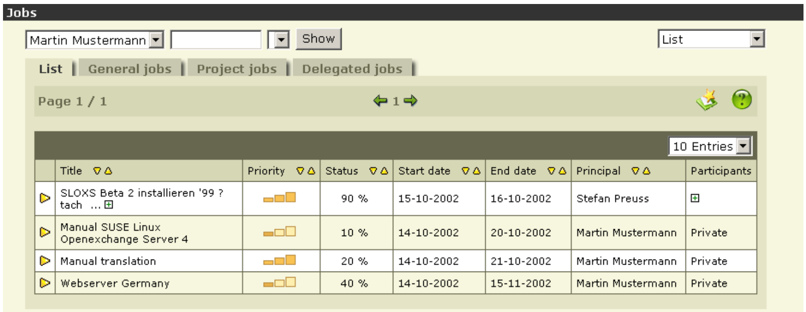


Figure 6.1: *List of Open Jobs or Delegated Jobs*

From the overview of all jobs, access more specialized job lists. All jobs that were not assigned a status of `ARCHIVE` are listed here. Finished jobs are displayed here until the job's creator or someone with write access moves them to the archive. All jobs that were not archived are included in the list on the main page in the 'List' tab. Use the menu in the upper right corner of the list to specify how many jobs are displayed per page. The additional jobs not included in this list can be reached with the icons.

To see a list of only general jobs, project jobs, or delegated jobs, open the corresponding tab. All lists are used in the same way. Open the detailed view of a job by clicking its title in the list.

6.1.1 List of All Jobs

This page shows an overview of all jobs assigned to you. All jobs not archived can be found here. Jobs that are overdue are highlighted in orange. Change the order by clicking the arrows in the table's first row.

Specify how many items to display per page using the menu at top of the table. Use the blue arrow buttons at the top of the page to turn the pages or just click the number of the page to view. To see the details of a job, click the yellow arrow button in the first column of the table or its title.

A plus sign in the column labeled participants indicates that this job has more participants than can be displayed in this list. To see a complete list of participants, either click the plus sign, which opens the participant list of the job details, or hover the mouse above it, which opens a tooltip with the information. To create a new job, click the icon of a sheet of paper with a star.

Using the print icon, print a list of all your jobs. Clicking the print icon opens a new window in your browser, showing all entries optimized for your printer. Use the print function of your browser for output of this list. For example, Internet Explorer provides access to this function with 'File' → 'Print'. The SUSE LINUX Openexchange Server print function is needed for proper ouput of the list.

It is also possible to view jobs assigned to others to which you have read access. Use the form to the left under the menu bar to locate the desired user.

- **By group:**

  Select a group of which the desired user is a member from the first drop-down box. Then select the desired user from the right drop-down box.

- **By search field:**

  Enter search criteria for searching the entire user base. The search criteria is applied to the login name and first and last name. Wild cards, such as `'*'` and `'?'`, work as well. All user names matching your criteria appear in the right drop-down menu. Select the user whose jobs should be displayed.

6.1.2 General Jobs

General jobs are jobs that are not part of a specific project. It is of no importance who assigned this job to you. Other than this restriction of jobs displayed, the list is identical to the list of all jobs and can be manipulated the same way.

All jobs not archived yet are listed. Overdue jobs are highlighted in orange. Use up and down arrows in each column's header to sort the list table by column in an ascending or descending order. Change the number of jobs displayed using the drop-down menu on top of the table. Use the green left and right arrows on top of the page to page through jobs or click the number of the page to display. To open the detailed view of a job, click the yellow arrow in front of the entry or click the job's title.

If a plus sign is shown in the 'participants' column, there are more participants than can be shown at once. Click the plus sign to access the detailed view of all participants of this job. Hover the mouse cursor above the plus sign to view a tooltip with the information. To create a new job, click the 'Create job' icon.

Use the print icon to print a list of all delegated jobs and those jobs not based on a project. A print-optimized page opens in your browser. Use the print function of your browser as usual to print this table.

6.1.3 Project Jobs

This list shows jobs that are assigned to specific projects. Project-related jobs can be added in the job module only, but you can find the in the detailed view of the respective project as well later on.

The project job list includes all project-related jobs not yet archived. Overdue jobs are highlighted in orange. Use the up and down arrows in each column's header to sort the list table. Change the number of jobs displayed using the drop-down menu on top of the table. Use the green left and right arrows on top of the page to page through jobs or click the number of the page to display. To open the detailed view of a job, click the yellow arrow in front of the entry or click the job's title.

If a plus sign is shown in the 'participants' column, there are more participants than can be shown at once. Click the plus sign to access the detailed view of all participants of this job. Hover the mouse cursor above the plus sign to view a tooltip with the information. To create a new job, click the 'Create job' icon.

Use the print icon to print a list of all delegated jobs and those jobs not based on a project. A print-optimized page opens in your browser. Use the print function of your browser as usual to print this table.

6.1.4 Delegated Jobs

Delegated jobs are those assigned to other users. This list shows jobs you have delegated that are not yet archived. Interact with it as with other lists.

Overdue jobs are highlighted in orange. Use the up and down arrows in each column's header to sort the list table. Change the number of jobs displayed using the drop-down menu on top of the table. Use the green left and right arrows on top of the page to page through jobs or click the number of the page to display. To open the detailed view of a job, click the yellow arrow in front of the entry or click the job's title.

If a plus sign is shown in the 'participants' column, there are more participants than can be shown at once. Click the plus sign to access the detailed view of all participants of this job. Hover the mouse cursor above the plus sign to view a tooltip with the information. To create a new job, click the 'Create job' icon.

Use the print icon to print a list of all delegated jobs and those jobs not based on a project. A print-optimized page opens in your browser. Use the print function of your browser as usual to print this table.

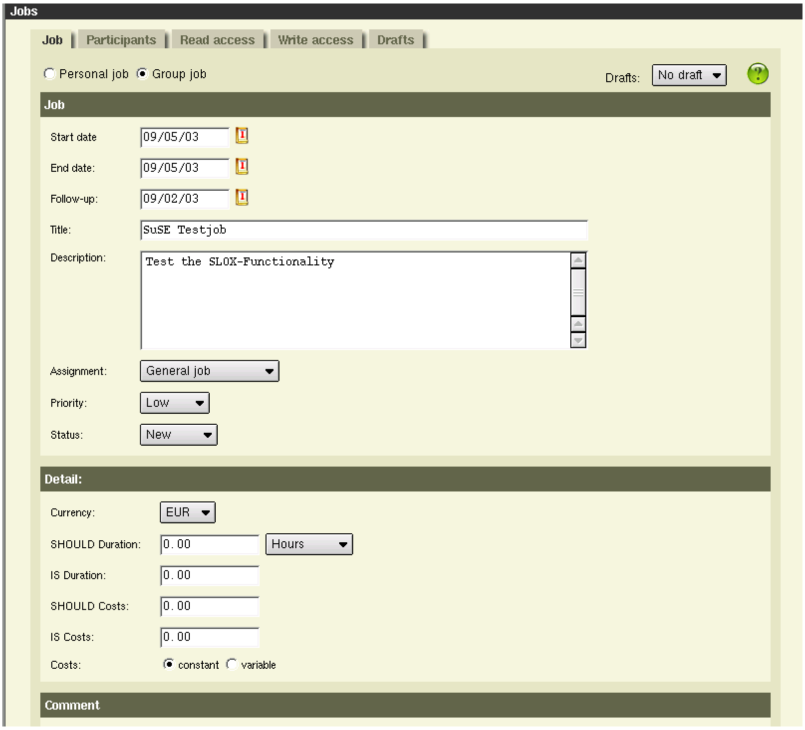


Figure 6.2: Creating a New Job

6.2 Creating a New Job

To create a new job, click the 'New' icon  .

6.2.1 Permissions

If this job is only valid for yourself, choose 'private'. When creating the job, you will be the only one who has read and write access. Permissions can also be set 'individually'. The default is 'private'.

Caution

Permissions

If you later change this setting to ‘private’, **all** participants will be removed from this job. Additional information about permission management can be found in Section 2.3.1 on page 21.

Caution

6.2.2 Start Date

The start date defaults to the current date. Enter the date when the job begins. The date format is MM/DD/YY. Alternatively, set the date using the built-in calendar by clicking the calendar icon. This opens a window containing a calendar in which to click the desired date. When creating a project job, the system verifies if the start date is within the project’s time frame. Entering a start date is mandatory.

6.2.3 End Date

Enter the date when the job should be completed. The date format is MM/DD/YY. Alternatively, select the date using the built-in calendar by clicking the calendar icon then clicking the desired date in the window that opens. The end date defaults to the current date. When creating a project job, the system verifies that the end date is within the project’s time frame. Entering an end date is mandatory.

6.2.4 Follow-up Date

Enter a date on which to be reminded of this job. After this date, the job is listed on your portal page. The date format is MM/DD/YY. If desired, use the built-in calendar. For project jobs, the system verifies that the date is within the project’s time frame.

6.2.5 Title

Enter a title for the job here. Entering a title is mandatory.

6.2.6 Description

Enter a description of the task here.

6.2.7 Assignment

Set whether this job is a general job or part of a project. If it is part of a project, select the project from the drop-down box. Otherwise, select 'general job'. If it is a project job, the system automatically checks whether this job's time frame is within the project's time frame.

6.2.8 Priority

Assign a priority to the job. Select from 'low', 'middle', or 'high'. The default is 'low'.

6.2.9 Status

Specify the completed percentage of the job in increments of ten. By default, the value is 'NEW'. If you are the creator or have write access, move this job to the job archive when desired by specifying 'ARCHIVE'.

6.2.10 Currency

Choose the currency to you use for SHOULD costs and IS costs. Currencies shown in this field depend on the list of currencies provided by your system administrator.

6.2.11 SHOULD Duration

Specify the estimated duration of the task in 'hours' or 'work days'. Select the unit from the drop-down box.

Note

This value can only be changed by someone with write access.

Note

6.2.12 IS Duration

Enter the real time the job has taken in 'hours' or 'work days' — the same unit as for the 'SHOULD duration'. On the details page, view the difference between the SHOULD and IS durations. The IS duration can also be modified by participants with only "read access". Projects add up the time of associated jobs for the project time.

6.2.13 SHOULD Costs

Enter the estimated costs using the currency chosen above. This value can be changed by someone with “write access”.

6.2.14 IS Costs

Enter the real costs of the job, using the currency chosen above. On the details page, view the difference between the SHOULD and IS costs. The IS costs can also be modified by participants with only “read access”. Projects add up the costs of associated jobs to determine the cost of the project.

6.2.15 Costs

Specify whether the costs for this job are variable or constant.

6.2.16 Comments

Predominantly, jobs cannot be modified by someone with only “read access”. However, some of these fields can be modified by people with only read access. It makes it easier to manage participant contributions to job information. These fields are Status, IS duration, and IS costs.

As many comments as desired can be added to a job. When you change the job’s status, a comment must be added so other participants can understand the changes. Fill in the fields ‘About’ and ‘Comment’ then click ‘Save’.

On the details page of a job, access a list of all comments with the ‘Comments’ tab.

6.2.17 Reminder

To have a reminder about the job e-mailed to you, select a time from the drop-down menu. You will then be reminded by e-mail of this job one to three days before the end date. For other participants to be informed of the changes you made to this job, check ‘notify participants’. If another internal user of SUSE LINUX Openexchange Server opens the notification of a new job with the SUSE LINUX Openexchange Server webmail client, a new pop-up window opens, giving him the possibility to accept or decline the new job.

6.2.18 Participants

Select the task members and the access permissions from the corresponding tabs. For additional information, consult the help pages.

To save your entries, click 'Save'. To discard them, click 'Cancel'.

6.3 Modifying a Job

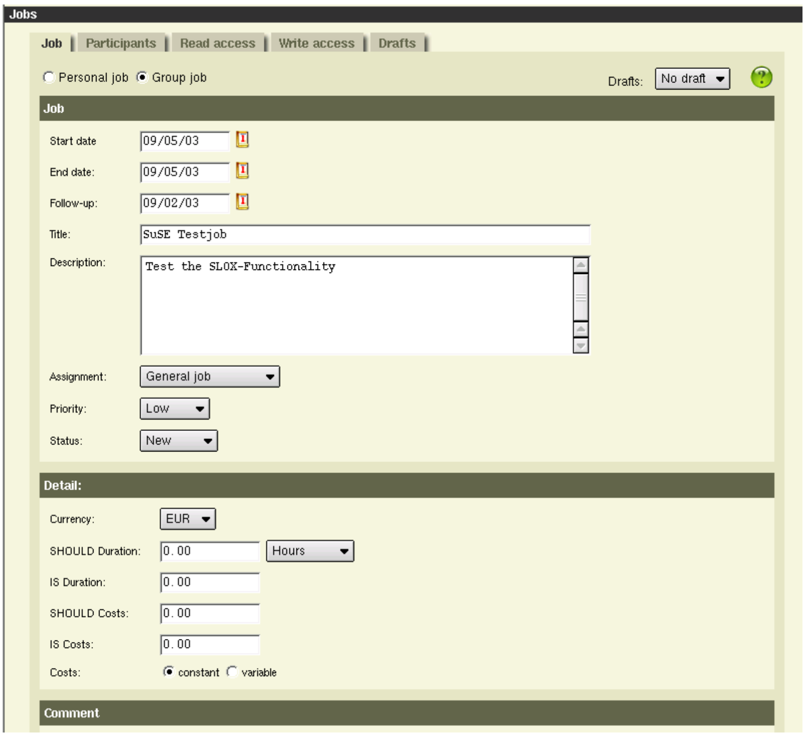


Figure 6.3: Detailed Job View

To edit a job, first open its details page. Then click the 'Edit' icon  to open the dialog for modifications. If you have write access, you can now change the assigned participants and all this job's details. For example, change this job's status or declare it done. You may also move this job to the archive.

This job's details can only be modified if you have write access. If you have only read access, you can still change the values 'IS duration', 'IS costs', 'About', 'Comment', 'Reminder by mail', and 'notify participants'.

Further information about the significance of each field can be found in Section 6.2 on page 83.

In 'options', decline or accept a job assigned to you. You may also add a comment detailing your choice. 'Participants' shows the status and comment (if any) of each participant. The status can be `open`, `declined`, or `accepted`.

6.4 Forwarding a Job

If you received this job from someone else and have write access, you can delegate it to others. To do this, edit the job and modify the participants list.

6.5 Job Archive

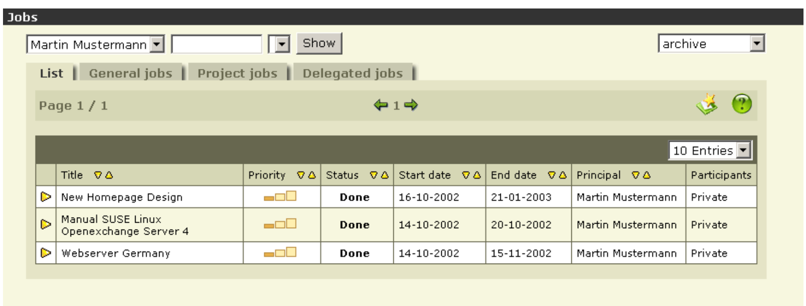


Figure 6.4: *Job Archive*

The job archive contains all jobs that have been archived. Access the archive by selecting 'Archive' in the drop-down box in the upper right of all list pages. Access the detailed view of the job by clicking its title. Archived jobs can still be modified.

6.6 Deleting a Job

To delete an existing job, open the detailed view of the job. Then click the trash can icon. A confirmation dialog opens. To delete an existing job, you need proper write permissions for the job. When you delete an existing job, a notification e-mail is sent to all participants of the job.

6.7 Job Notes

You may add short notices and information to a job. Open the 'Notes' tab to view a list of all notes about this job.

Click 'Create New'  to attach a new note to the job. Note permissions are managed separately, so it is possible to attach a private note to a job. Further information about notes can be found in Section 2.4 on page 28.

6.8 Linking a Job

Jobs can be linked to other objects, such as addresses, contacts, other jobs, projects, bookmarks, and forums. Link the job to other objects by selecting 'Links' from the job's details page. All links already present are listed on this page. Create a link by clicking 'activate linking' then navigating to the details page of the target object. Choose 'Links' there then click 'Create' to establish the link. To leave the linking mode, click 'deactivate linking'.

Only linked objects to which you have read access are shown. More information about linking is available in Section 2.5 on page 29.

6.9 History

The detailed view of a job also has a tab for 'History'. Use it to view which user originally created this entry and when it was created. Additionally see when the last changes were saved for this job and which user made them.

Projects

The projects module is well suited for collecting and managing project information. Apart from entering project-specific data, view project jobs here. You can also define “Milestones” for a project of which you can, of course, be reminded. Additionally add notes to projects and link projects with other objects relevant to the project. For example, create a forum for the discussion about a project and link it to the project.

7.1 Overview of Projects

Figure 7.1: *Overview of Projects*

This page provides an overview of all projects assigned to you. All past dates are highlighted in orange. Change the ordering of the table by clicking one of the yellow arrows (upward for ascending, downward for descending) in the table's head. Specify how many items should be displayed per page using the drop-down box on top of the table. By clicking the green arrows on top of the page, turn the pages or just click the page number to see.

To see the details of a project, click the yellow arrow in the first column of the table. To create a new project, click the 'Create New' icon.

Using the print icon, print a list of all your shown projects. Clicking the print icon opens a new window in your browser, showing all entries optimized for your printer. Use the print function of your browser to print this list. For example, Internet Explorer provides access to this function with 'File' → 'Print'. The SUSE LINUX Openexchange Server print function is needed for proper output of the list.

7.1.1 Searching for Projects

In the search field of the "Magic bar", look for other people's projects to which you have access. Choose the user's group from the first list. This way, also find all projects of other participants. Use the text field to search for the user whose projects interest you. Enter the name of the user and press ⏎. If more than one entry matches your criteria, select the correct one from the list to the right.

From the list field in the upper right corner of the "Magic bar", select which types of projects should be listed. The following choices are possible.

List With the 'List' option, see a list of all active projects that have not been archived yet.

Past-due projects These projects have not been finished yet although their end date has already been reached.

Next 7 days This option displays all projects that need to be completed within the next seven days — those whose end date will be reached.

Archive This option shows all projects that were completed and moved to the archive.

Selecting a project is as simple as clicking the project's title or the yellow arrow in the first column of the project table. This opens the detailed view of the project.

7.1.2 Details Page of a Project

Figure 7.2: *Project's Detailed View*

See all information about a project in its details page, as shown in Figure 7.2. Past dates are highlighted in orange. 'IS Costs' and 'IS Duration' are the sum of all ‘IS Costs’ and ‘IS Durations’ of all this project’s jobs. The currency used for the fields IS costs, Gains, and Expenses depends on the currency selected when adding the project and the project-related jobs. If there are amounts for jobs in different currencies, all amounts for different currencies are shown separately.

Options

If this project was assigned to you by someone else, you have the possibility to accept or decline it. Enter a comment regarding your decision in the text field. If you decline a project, the comment is mandatory. Both your choice and comment are displayed on the participant list. After selecting a response, click ‘Save’.

Other Information

Using the tabs, find other information regarding this project. With the ‘Participants’ tab, find a list of all people to whom this project has been assigned. With ‘Comments’, see all comments about this project. Use ‘Milestones’ to view a list of all milestones created for this project. ‘Jobs’ lists all jobs associated with this project. ‘History’ shows who has changed or created this project. ‘Notes’ displays all notes attached to this project, ‘Links’ lists all links this project may have to other objects. Additional information can be found on the help pages.

7.2 Printing a Project List

Using the print icon, print a list of all projects shown. Clicking the print icon opens a new window in your browser, showing all entries optimized for your printer. Use the print function of your browser to print this list. For example, Internet Explorer provides access to this function with ‘File’ → ‘Print’. The SUSE LINUX Openexchange Server print function is needed for proper output of the list.

7.3 Creating a New Project

Create a new project by selecting the appropriate link in the ‘Create new’ area on the portal page or by clicking the ‘New’ icon. First, enter at least the project’s end date, its name, and type. Next, select all participants from the lists of users and groups. Afterwards, enter additional information about this project as described in the following.

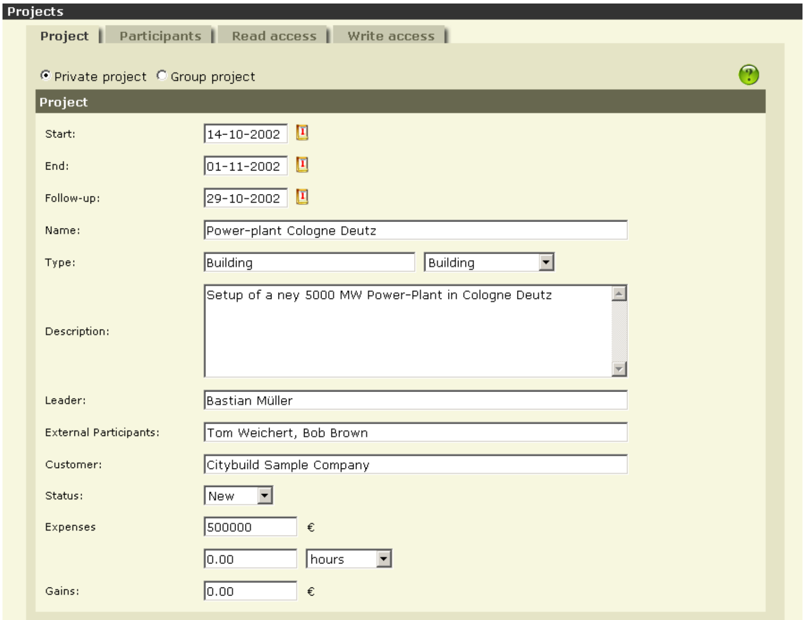


Figure 7.3: Creating a New Project

7.3.1 Permissions

If this project is solely valid for yourself, select 'private'. You may not add other participants to the project and initially are the only one that has read and write access to it.

Although this project is private, you may grant read and write access to other people. You can also declare this project a 'Group project'.

Caution

If you later change a project to a private one, **all** its participants will be removed from it.

Caution

7.3.2 Begins

Enter the date when the project starts. The date format is MM/DD/YY. Alternatively, select the date using the built-in calendar by clicking the calendar icon. In the window that opens, click the date to enter.

The start date defaults to the current date. Entering a start date is mandatory.

Caution

All mandatory fields must be completed before you can select another tab.

Caution

7.3.3 Ends

Enter the date on which the project should be completed. The date format is MM/DD/YY. Alternatively, select the date using the built-in calendar by clicking the calendar icon. In the window that opens, click the date to enter. Entering an end date is mandatory.

7.3.4 Follow-up Date

Enter the date on which to be reminded of the project. After this day, a note regarding this project is listed on the portal page. The date format is MM/DD/YY. Alternatively, select the date using the built-in calendar by clicking the calendar icon.

7.3.5 Name

Enter the title of the project here. Entering a title is mandatory.

7.3.6 Description

Enter a description of the project here.

7.3.7 Leader

Enter the name of the project leader.

7.3.8 External Participants

If this project has participants that do not have accounts on the system, such as project partners from other companies, enter their names here.

7.3.9 Customer

If this project is for a customer, enter the customer name here.

7.3.10 Type

Enter the project type, such as software development. Entering a type is mandatory.

7.3.11 Status

Specify the percentage complete the project currently is. The status can be entered in increments of ten percent. By default, the value is 'NEW'. During the project, the status can be increased until it is 'Done'.

If you are the creator of this project or have write access, move this project to the project archive by specifying 'ARCHIVE'. The project will not be listed anymore in the main list, but you can still find it in the archive.

7.3.12 Currency

Select the currency to use for expenses and gains. To select the currency, use the drop-down menu. The available currencies shown depend on the configuration made by your administrator. If you need more currencies not shown in this field, contact him to add the needed currency. The chosen currency for this project is automatically used as the standard currency for all project-related jobs.

7.3.13 Planned Expenses

Enter the planned expenses in the currency chosen above and the planned duration of the project in 'hours' or 'work days'. Select the unit in the drop-down menu next to the text field.

7.3.14 Gains

Enter the expected revenue of this project.

7.3.15 Comments

Participants can use comments to add notes about the project description or document changes made to this project. Every time a project is edited, you may add a comment to it.

Complete the fields 'About' and 'Comment' then click 'Save'.

7.3.16 Reminder

To be reminded of this project by e-mail, specify when the reminder should be issued. The notification will then reach you one to three days before the project's 'End date'. To inform the other internal participants of your changes, check 'notify participants'.

7.3.17 Finishing Creation

Use the tabs to access other forms in which to specify the 'participants' and 'read and write access' for this project. For additional information, consult Section 2.3.1 on page 21. To save the changes, click 'Save'. To discard them, click 'Cancel'.

7.3.18 Adding Jobs

Add jobs to this project in the 'Jobs' module. Refer to Chapter 6 on page 79.

7.4 Editing a Project

To edit a project, first navigate to its details page. Open the editing form by clicking the 'Edit' icon. If you have "write access", you can now change the assigned participants and all this project's details. You may also increase this project's status or declare it "done". If desired, move the project to the archive. Further information about the significance of each field can be found in Section 6.2 on page 83.

In the 'options' form of this project, decline or accept a project assigned to you. You may also add a comment detailing your choice to the answer. On the 'Participants' tab, the status and comment (if any) of each participant is listed. The status is `open`, `declined`, or `accepted`. This is only available if this project was assigned to you by someone else.

To save the changes, click 'Save'. If you do not want to save changes, click 'Cancel'.

7.5 Project Archive

Figure 7.4: Project Archive

The archive contains projects that have been archived. Usually, these are projects that have been completed or discontinued. Open the archive by selecting 'Archive' in the drop-down menu in the upper right of the list page.

Open a detailed view by clicking on project's name. Permission settings may still be modified in archived projects.

7.6 Deleting a Project

To delete this job, click the green trash can icon and confirm your command. To cancel the delete process, press 'Cancel'. Deleting a job requires proper write access to the job. Normally, every user with write access to a project may delete it. If a special user is assigned as the project's owner, he is the only one allowed to delete the job. If a job is deleted, SUSE LINUX Openexchange Server automatically generates notification e-mails, sent to all participants of the job.

Note

Deleting a Project

As well as deleting a project itself, you can also delete all project-related jobs. Activate check box 'Delete assigned job' to do so. If you hold the right to delete a project but are not granted this right for all its related jobs, all jobs to which you have delete rights will be deleted. All other jobs will remain, but they are no longer assigned to any project.

Note

7.7 Project Notes

You may add short notices and information to a project. Open the ‘Notes’ tab to see a list of all notes about this project. With the ‘New Note’ icon, write a new note about this object.

Notes have a separate permission management system. A private note can be added to a public project. More information about notes can be found in Section 2.4 on page 28.

7.8 Linking a Project to Other Objects

Projects can be linked to addresses, contacts, jobs, other projects, bookmarks, and forums. Link the project to other objects by first selecting the ‘Links’ tab from the project’s details page. All links already present are listed on this page.

Create a link by clicking ‘activate linking’ then navigating to the details page of the target object. Open the ‘Links’ tab there then click ‘Create’ to establish the link. To exit linking mode, click ‘deactivate linking’.

Only links to objects for which you have read access may be viewed or created. More information about linking is available in Section 2.5 on page 29.

7.9 Comments about Projects

A list of all comments can be found below the ‘Comments’ tab. Change the sort order of the table by clicking one of the yellow arrows (up for ascending, down for descending) in the table’s head. Specify how many items should be displayed per page using the drop-down menu on top of the table. Click the blue arrows on top of the page to turn the pages or just click the number of the page to view. To see the details of a comment, click the ‘About’ line or the yellow arrow in the first column of the table.

To add a comment, edit this project as explained in Section 7.4 on page 98. Enter a subject and comment then click ‘Save’ to add a comment to this list.

7.10 Milestones for Projects

In the detailed view of a project, find the ‘Milestones’ tab. Selecting it opens a list of all important stages of this project. With milestones, keep track of how well your project progresses.

Change the order of the table by clicking one of the yellow arrows (up for ascending, down for descending) in the table's head. Specify how many items should be displayed per page using the drop-down menu on top of the table. Click the blue arrows on top of the page to turn the pages or just click the page number of the page to view. To see the details of a milestone, click the yellow arrow in the first column of the table.

Milestones play an important role in projects. For this reason, it is usually vital that everything related to a milestone is finished on schedule. The system can remind you of these important dates. Simply edit a milestone and select the respective options. To create a new milestone, click the 'Create New' icon.

7.11 Project Jobs

From the detailed view of a project, access a list of all jobs associated with this project by opening the 'Jobs' tab. Change the order of the table by clicking one of the yellow arrows (up for ascending, down for descending) in the table's head.

Specify how many items should be displayed per page using the drop-down menu on top of the table. Click the blue arrows on top of the page to turn the pages or click the page number of the page to display. To see the details of a job, click the yellow arrow in the first column of the table.

A plus sign in the participants column shows that this job has more participants than can be displayed in this list. Click the plus sign to open participant list of the job details. Alternatively, hover the mouse cursor over the plus sign to view a tooltip listing all participants.

To create a new job, click . The job's affiliation then defaults to this project. Additional information about creating jobs can be found in Section 6.2 on page 83.

7.12 History

In the details page of a project, also find the 'History' tab. Use it to see which user originally created this entry and when it was created. Additionally, see when the last changes were saved for this project and which user performed them.

Documents

In the document management module, upload documents and make them available to other users. The documents can be viewed directly or downloaded. To make managing your documents easier, an extensible folder hierarchy has been implemented. Both folders and documents have access permissions. You are able to save documents in different versions.

8.1 Document Directory Structure

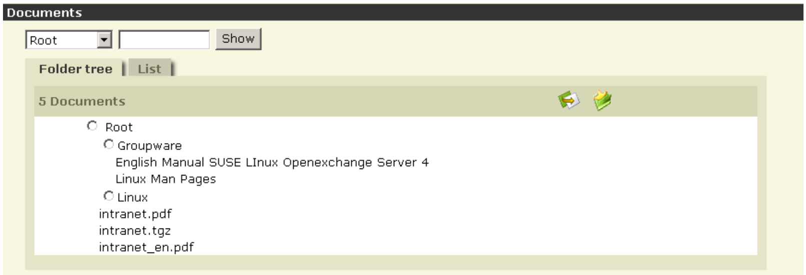


Figure 8.1: *The Directory Structure for Documents*

To make managing documents in a concise way easier, a folder structure, similar to the directory structure of a computer, is at your disposal. As many folders and subfolders on different levels as desired may be created. Refer to Figure 8.1.

Because of the permission system implemented, only see folders to which you have read access. It is not possible to view documents or folders, regardless of their permissions, that are contained within a folder to which you do not have access. Documents you cannot view will not be listed in search results.

To see the contents of a folder, click the plus sign in front of the folder. The folder is then opened and its contents listed. An open folder is marked with a minus sign. Click it to close the folder again. Folders without either symbol are empty or contain only documents to which you do not have access.

As well as the tree-based document overview, a table list view of all documents is also available. Open this list with the tab ‘List’. In the table view, use the same groupware functions as in the tree view.

8.1.1 Creating a Folder

Before adding a new folder, determine where it should be placed by marking the radio button in front of the new folder’s parent folder. If no parent folder is marked, the new folder is added to the root folder.

Click the ‘new folder’ icon  , located to the upper right of the directory view. In the form that opens, shown in Figure 8.2 on the next page, specify access permissions for the new folder and its name.

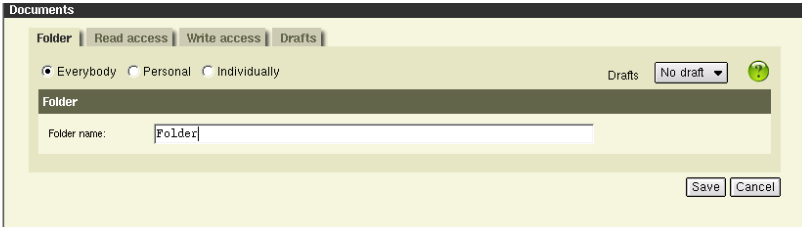


Figure 8.2: Creating a Folder

Note

Different permissions can be assigned for documents and folders. If folders and the documents in it have the same permission settings, someone who can view the folder sees a complete content listing. If a user cannot view a folder, he cannot view items in it, even if they have less restricted access permissions.

Note

Click 'Save' to create the new folder. To abort the creation, click 'Cancel'.

8.1.2 Editing Folders

Select the folder to edit from the directory tree by marking its radio button. Next, click the 'Edit' icon, located to the upper right of the tree. If you have write access to the folder, this opens the edit form in which to change the permissions to the folder.

To save the changes, click 'Save'. To discard them, click 'Cancel'.

8.1.3 Deleting a Folder

To delete a folder, first select it from the directory tree. Then click the trash can icon. A confirmation window opens.

Caution

Deleting a folder also deletes all subfolders and documents it contains. Only folders and documents to which you have write access may be deleted. An error appears if you attempt to delete something to which you do not have access. The root folder may not be deleted.

Caution

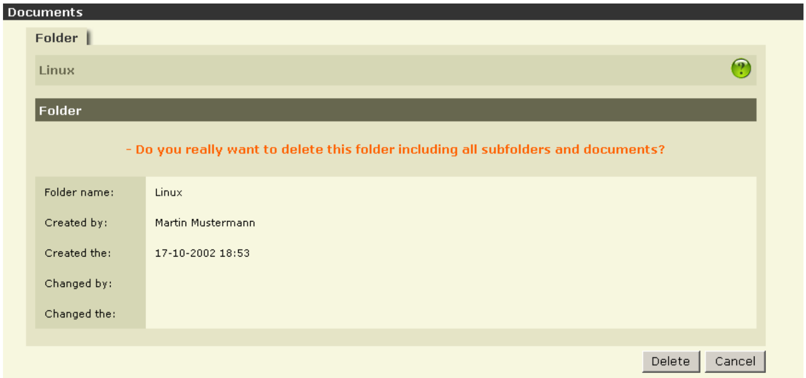


Figure 8.3: Confirming Deletion

If you are absolutely sure you want to delete the chosen folder and all documents and subfolders it contains, click 'Delete'. To abort, click 'Cancel'.

8.2 Uploading Documents to the Server

Figure 8.4: Uploading Documents

Select the folder in which to place the new document by marking its radio button. If you do not mark a folder, the new document will be added to the root folder. Switch to the creation form by clicking the 'Create new' icon. A dialog opens in which to specify the document's description and its access permissions.

8.2.1 Permissions

Three access permission settings are available: 'private', 'individually', and 'everybody'. If you define specific access permissions manually, 'individually' is marked automatically. Additional information about permission management can be found in Section 2.3.1 on page 21.

8.2.2 File Name

The name under which this document is listed in the document management can be specified here.

Tip

For this document to have the same name as it has on your hard disk, leave this field empty. When you later upload the file, its name is automatically applied to this field. The file name is version specific. If you change the file format between one version and another, the file name should reflect that change accordingly.

Tip

8.2.3 Description

Enter a description for this document here. The description is version-specific — every version has its own description.

Tip

When writing the description, try to describe the differences between the versions. This allows them to be distinguished easily.

Tip

8.2.4 Assigned Version

This field details the version number of the document being edited. If you create this document, you are working on the first version. Remember the version number when filling in version-specific fields ('File name', 'Description', 'MIME type', 'File size').

8.2.5 Selecting a File

The file to upload to the server is set under the ‘File’ tab. To select a file from your hard disk, click ‘Browse’. In the emerging file browser, specify the file to upload. Its path is then entered in the text field.

To start the actual transfer, click ‘Upload’. Depending on the file’s size, this can take some time.

Figure 8.5: *Selecting the File to Upload*

8.2.6 MIME Type

MIME stands for Multipurpose Internet Mail Extensions and was originally a standard that described how different file types (e. g., pictures or music files) should be transmitted from one e-mail server to the next. Because this standard is very flexible, it became widely accepted in other areas of the Internet as well. Your browser, for example, knows how to handle a file it receives by the file’s MIME type. Text documents are usually displayed, while music files are played. For browsers to handle documents correctly when downloading them, specify your file’s MIME type. When you are uploading a file to the server, the system tries to guess the MIME type and enters the result in this text field. Overwrite this, if desired. The following is a short, but very incomplete, list of MIME types. Some file types have more than one MIME type.

The browser usually offers to download if it encounters a file of the MIME type `application/octet-stream`. If you are not sure which MIME type to specify and if you are not content with the systems proposition, enter this MIME type.

MIME Type	Description
application/octet-stream	Generic data stream
text/plain	ASCII text
text/html	HTML document
application/msword	Word document
application/pdf	PDF document
application/rtf	RTF document
application/zip	Zip archive
image/bmp	Bitmap image
image/jpeg	JPEG image
image/png	PNG image
audio/midi	Midi song
audio/mpeg3	MP3 music file
video/mpeg	MPEG video

Table 8.1: *MIME Types*

8.2.7 Saving the Document

Click 'Save' to save the settings for the document.

8.3 Reading and Downloading Documents

Locate the desired document in the folder structure. If you click the document icon, the document is displayed in your browser, if possible. If you click the document's title, the document's details page opens. In it, you can also see a link to the document. If you click it, the browser asks where to save the file. If you leave the mouse cursor hovering above the file's entry in the document tree, a tooltip appears with information about the document's creator, its size, and the version.

8.4 Modifying the Description and Permissions

To change the document's description, first open the document's details page. Then click the 'Edit' icon to access a form in which to change the document's description. Click 'Save' to save any changes made. Click 'Cancel' to abort.

Figure 8.6: *Downloading Documents*

Note

You may not change the document's content within the groupware. To modify the document, download it and change it on your computer. Then upload the file again using the form below the 'File' tab in the editing form to create a new version of the document. The old version will still be available.

Note

8.5 Deleting Documents

There are two ways in which to remove a document from the server.

8.5.1 Deleting the Entire Document Entry and All Versions

To delete a document entry including all its versions, open the detailed view of the document. Then click the trash can icon. A confirmation dialog opens.

If you are sure you want to delete the document's entry, click 'Delete'. If you do not want to delete the document, click 'Cancel'.

8.5.2 Deleting Old Versions

To remove old versions of a document from the server, open the document's details page. From there, select the 'Versions' tab. This opens a list of all versions of the document. The current version is marked in the 'current' column. Check the boxes in the last column for all versions to delete from the server. Next, click 'Delete versions'.

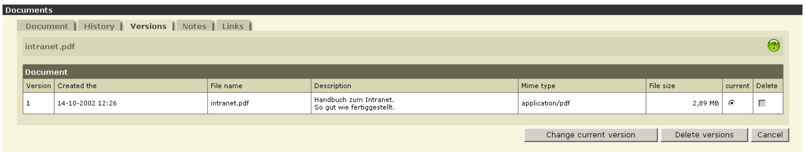


Figure 8.7: *Removing Old Versions*

8.6 Moving Folders and Documents

8.6.1 Defining the Sources

Enter moving mode by clicking the 'Move' icon  above the directory tree. This page, similar to that in Figure 8.8, shows a folder structure much like that

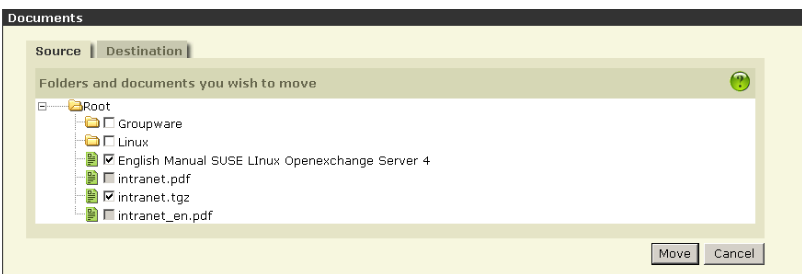


Figure 8.8: *Selecting the Source Folder and Documents*

in the main directory tree. Select the documents and folders to move by checking the corresponding check boxes. Multiple items can be selected. All contents of folders are moved as well when folders are selected.

Only folders and documents to which you have access can be selected. The check box is grayed out otherwise.

8.6.2 Specifying the Destination

After choosing the sources, open the 'Destination' tab. Select the folder into which to move the selected documents and folders by marking its radio button.

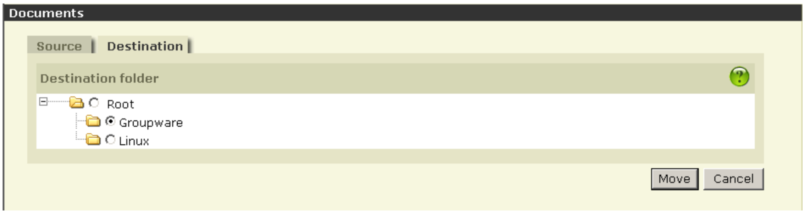


Figure 8.9: Selecting the Destination

8.6.3 Moving the Items

Confirm the move operation by clicking 'Move'. If you do not want to move the objects, click 'Cancel'.

Note

If you try to move the folder into itself or one of its subfolders, the system generates an error message.

Note

8.7 Locating Documents

With the "Magic bar" (upper part of the page), directly search for a document. Select the folder to search from the list then enter the search term into the text field. The results are listed on the page below the 'List' tab (refer to Figure 8.11 on the facing page). Access the details page of a result by clicking the icon in the first column. Content cannot be searched — only titles.

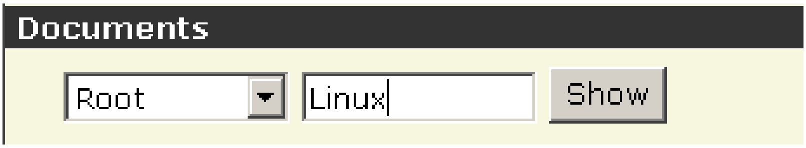


Figure 8.10: Searching Documents with the Magic Bar

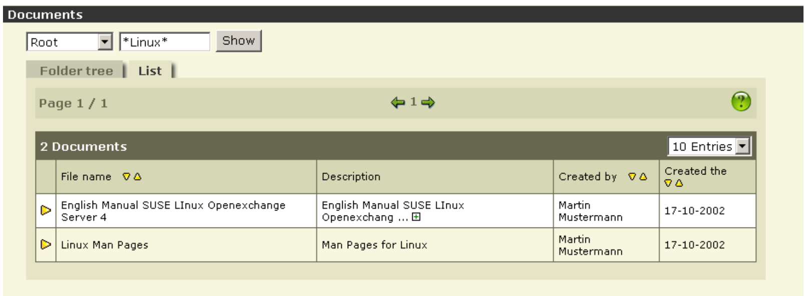


Figure 8.11: Results of a Document Search

8.8 Notes

You may add short notices and information to a document. Change to the 'Notes' tab to view a list of all notes about this document. With the 'Create Note' icon, write a new note about this object.

Notes are assigned access permissions separately. It is possible to attach a private note to a public document. More information about notes can be found in Section 2.4 on page 28.

8.9 Linking a Document to Other Objects

Documents can be linked to addresses, contacts, jobs, other documents, projects, bookmarks, and forums. First select the 'Links' tab from the document's details page. All links already present are listed on this page. Create a link by clicking 'activate linking' then navigating to the details page of the target object. Open the 'Links' tab there and click 'Create'. To leave the linking mode, click 'deactivate linking'.

You must have read access to the linked object to view or create a link. More information about linking is available in Section 2.5 on page 29.

8.10 History

In the details page of a document, also find the 'History' tab. Use it to find out which user originally created this entry and when it was created. Additionally, view when the last changes were saved for this document and which user performed them.

8.11 Old Versions

The 'Versions' tab in the detailed view of a document lists the current version and all old versions. Change the current version by marking the radio button in the 'Current' column of the desired version. Confirm the choice by clicking 'Change current version'. To access old versions, simply make them the current version.

Knowledge

With the knowledge database, share interesting information with your colleagues. A folder structure similar to that in the document management system is used to structure the knowledge base. The folder structure and the entries are subject to the permission settings. This way, assign the different areas to the departments and teams in your company.

9.1 The Knowledge Base Directory Structure

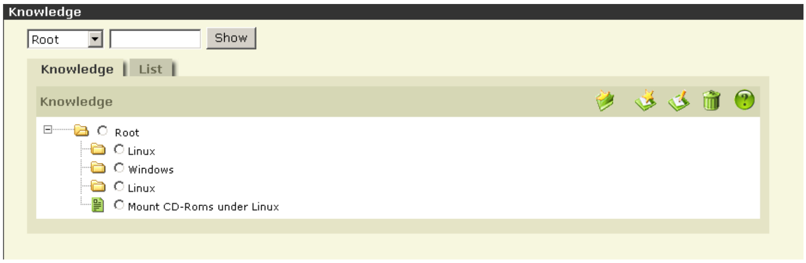


Figure 9.1: The Knowledge Directory Structure

To simplify knowledge management, a folder structure, which you might know from your computer, is available. Create an arbitrary number of folders and subfolders on different levels. See Figure 9.1.

Because of the permission management system, only see folders to which you have read access. This works hierarchically. If you may not view a folder, you cannot see the knowledge items it contains, regardless of their permission settings. Knowledge items that you may not view are not listed in search results.

To see the content of a folder, click the plus icon in front of the folder. The folder is opened and its contents listed. Open folders are marked with a minus icon. Close the folder again by clicking the minus icon. If neither symbol is displayed, the folder is empty or contains only items to which you do not have access.

Besides the tree view of all knowledge entries, view a list of all your knowledge entries in the 'List' tab. In addition to the normal functions of the knowledge module, you can use the print icon here to print a table of all your knowledge entries. Click the print icon to access a print optimized table of your knowledge entries with your Internet browser. If you use Internet Explorer, print with 'File' → 'Print'.

9.1.1 Creating New Folders

Before adding a new folder, select where to place it by marking the radio button in front of the new folder's parent folder. If you do not choose a parent folder, the new folder is added to the root folder. Click the 'New Folder' icon, located to the upper right of the directory view.

Figure 9.2: Creating a Folder for Knowledge Items

This opens a dialog like that in Figure 9.2. Assign access permissions for the new folder and its name.

Note

You may assign different permissions for knowledge items and folders. When a user lists folder contents, all items within that folder to which the user has access are listed. If someone does not have read access to a folder, it will not be possible for this user to view items contained in the folder, regardless of the permissions of the items.

Note

Click 'Save' to create the new folder. To abort creation, click 'Cancel'.

9.1.2 Editing Folders

Select the folder to edit from the directory tree and mark its radio button. Next, click the 'Edit' icon to the upper right of the tree. If you have write permissions to the folder, this opens a dialog in which to change the permissions to the folder.

To save the changes, click 'Save'. To discard them, click 'Cancel'.

9.1.3 Deleting Folders

To delete a folder, select it from the directory tree. Next, click the trash can icon. Confirm the delete process in the dialog that opens.

Deleting a folder also deletes all folders and items contained. Only folders and items to which you have write access may be deleted. The root folder may not be deleted.

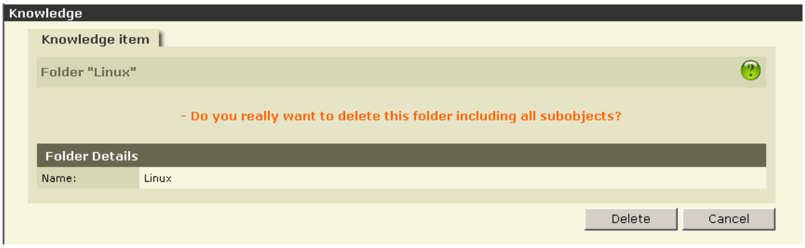


Figure 9.3: Delete Confirmation

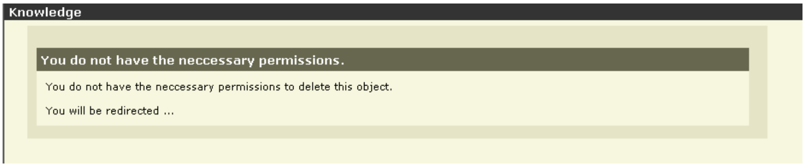


Figure 9.4: Notification Message — Deleting a Folder

If you are absolutely sure you want to delete the chosen folder and all items contained, click ‘Delete’ (see Figure 9.3). To abort the delete process, click ‘Cancel’.

Note

Problems

This deletes the selected folder as well as all included subfolders and knowledge entries in this folder. If you do not have the permissions to delete one of the objects in this folder, you cannot delete this folder. SUSE LINUX Openexchange Server provides a error message for three seconds before returning you to the overview of the knowledge module. If you received this error message, but the folder appeared empty, there are still objects in this folder to which you do not have read access. There is no way to delete such a folder without obtaining all needed permissions.

Note

9.2 Viewing Knowledge Items

To reach the details view of a knowledge item, locate the desired entry in the overview and click the document icon. The details page of the selected entry is then displayed.

9.3 Adding New Knowledge Items

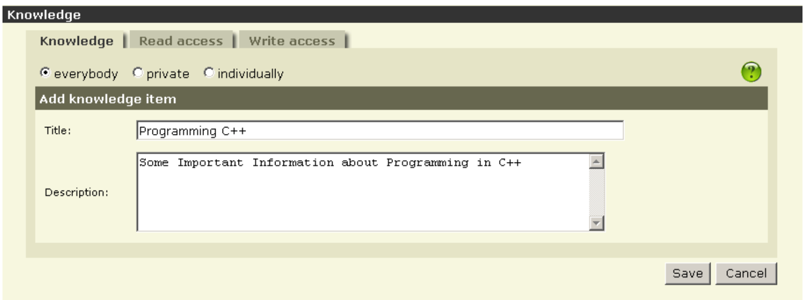


Figure 9.5: Adding New Knowledge Items

Select the folder in which to create the new knowledge item by marking its radio button. If you do not mark a folder, the new knowledge item is added to the root folder.

Open the creation form by clicking the 'Create new' icon . This opens a dialog in which to enter all details for the new knowledge item.

9.3.1 Permissions

Set access permissions for the knowledge item here. Set permission 'individually' or give 'everybody' access. If this knowledge item is for yourself only, select 'private'.

9.3.2 Title

Enter a title for the item here. Entering a title is *mandatory*.

9.3.3 Description

Enter the text of the knowledge item here. Entering a description is *mandatory*.

9.4 Changing a Knowledge Item

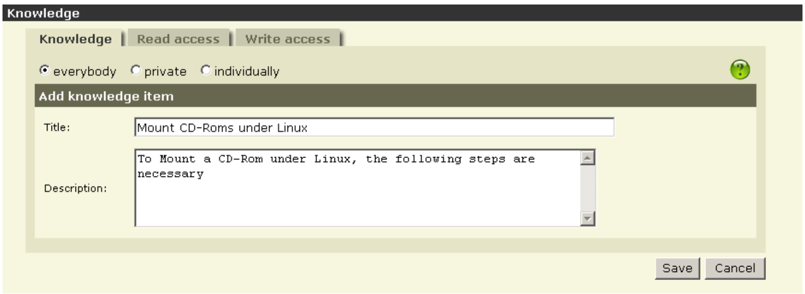


Figure 9.6: *Editing a Knowledge Item*

To change the knowledge item's entry, open the knowledge item's details page then click the 'Edit' icon. Alternatively, mark its radio button in the overview then click 'Edit'. A form in which to change the knowledge item's description and content appears. The significance of each field is described in Section 9.3 on the preceding page.

To save the changes, click 'Save'. To discard them, click 'Cancel'.

9.5 Deleting a Knowledge Item

To delete a knowledge item, mark its radio button in the overview. Next, click the trash can icon to the upper right of the directory. A confirmation dialog opens. If you are sure you want to delete the knowledge item, click 'Delete'. If you do not want to delete this knowledge item, click 'Cancel' to leave this page.

9.6 Moving Knowledge Entries and Folders

9.6.1 Defining Source Objects

To move an object or folder, click 'Move'. You will be redirected to the source page and presented with the folder tree of the knowledge management as in Figure 9.7.

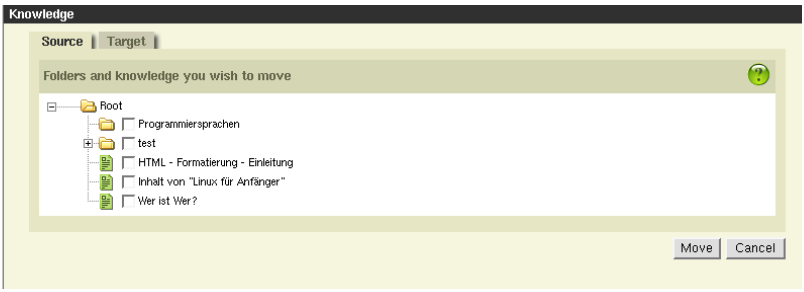


Figure 9.7: Selecting Source Folders and Knowledge Entries to Move

Click the plus icon in front of a folder to show the contents of the folder. If there is no plus icon, the folder is empty or it contains only subfolders and knowledge entries to which you do not have access. Select all folders and knowledge entries to move by marking the check boxes in front of them. If you move a folder, all its subfolders and knowledge entries are moved as well. If you are not allowed to move a folder or knowledge entry, the check box is inactive and displayed in gray. You cannot move a folder into itself or one of its subfolders.

9.6.2 Selecting the Target Folder

When finished your selection, select the target folder in the 'targets' tab. There, select the target folder by activating the corresponding radio button in front of the folder to which to move the sources. See Figure 9.8 on the following page.

9.6.3 Starting Moving

To start moving all selected source objects, click 'Move'. To cancel the movement, click the button 'Cancel'.

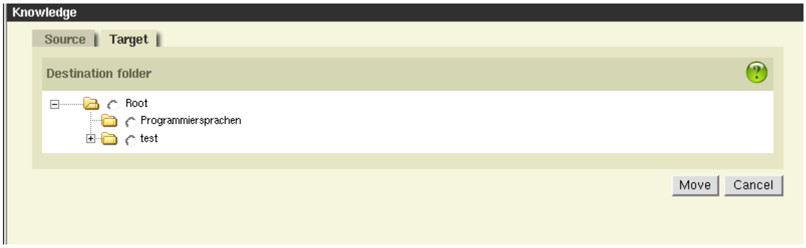


Figure 9.8: Select Target Folder

Note

Folders and Subfolders

If you try to move a folder into itself or of its subfolders, SUSE LINUX Openexchange Server displays an error message. Moving folders into itself or one of its subfolders is an invalid operation.

Note

9.7 Searching Knowledge Items

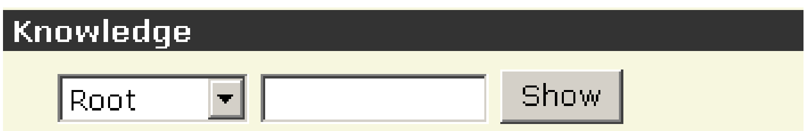


Figure 9.9: Searching Knowledge Items with the Magic Bar

With the “Magic bar” (upper part of the page), directly search for a knowledge item. Select a folder to search from the list then enter the search term in the text field. The results are then listed on the ‘List’ tab. Access the details page of a result by clicking the  symbol in the first column. You may not search by a knowledge item’s content, only by title.

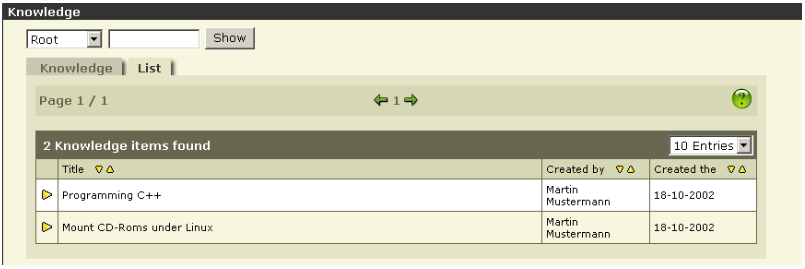


Figure 9.10: *Results of a Search for Knowledge Items*

9.8 Notes

You may add short notices and information to a knowledge item. Select the 'Notes' tab to see a list of all notes about this knowledge item. With the 'Create note' icon, write a new note about this object.

Notes have a separate permission management system. A private note can be attached to a public knowledge item. Further information about notes can be found in Section 2.4 on page 28.

9.9 Linking a Knowledge Item to Other Objects

Knowledge items may be linked to addresses, contacts, jobs, projects, bookmarks, other knowledge items, and forums. Link the knowledge item to other objects by first choosing the 'Links' tab from the knowledge item's details page. All links already present are listed on this page. Links may only be viewed or created if you have read access to the target object.

Create a link by clicking 'activate linking' then accessing the details page of the target object. Open the 'Links' there then click 'Create' to establish the link. To exit linking mode, click 'deactivate linking'. More information about linking is available in Section 2.5 on page 29.

9.10 History

In the details page of a knowledge item, also find the ‘History’ tab. Use it to find out which user originally created this entry and when it was created. Additionally, see when the last changes were saved for this knowledge item and which user performed them.

Bookmarks

Use the bookmarks module to collect links to interesting web sites and make them available to your colleagues. Also use it to visit the bookmarks entered by colleagues. A directory structure similar to the document management helps organize the bookmarks. The folder structure and the entries are subject to the permission settings. Different areas can be assigned to the departments and teams in your company.

10.1 The Directory Structure

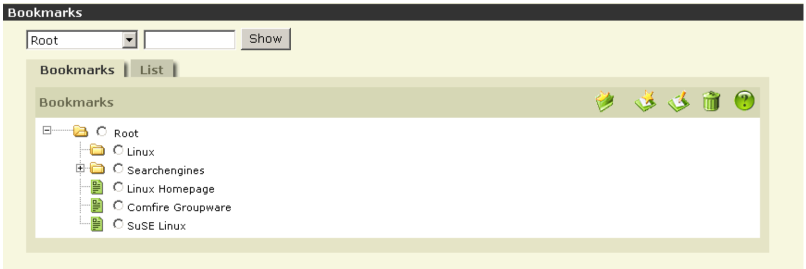


Figure 10.1: The Bookmark Directory Structure

Organize bookmarks into folders. Users can only see folders to which they have read access. Even if bookmarks within a folder have less restrictive permissions, users cannot view the bookmarks in a folder without read access to the folder. Only bookmarks you can view are shown in the results of searches.

To see the contents of a folder, click the plus sign in front of the folder. The folder is then opened and its contents listed. A folder whose contents are displayed is marked with a minus sign. Close a folder by clicking the minus sign. If neither a plus sign or a minus sign is displayed in front of a folder, the folder is either empty or contains only bookmarks and folders to which you do not have access.

As well as the tree view of all bookmark entries, you can view a table of all your bookmark entries in the tab 'List'. In addition to the normal functions of the bookmark module, use the print icon here to print a table of all your bookmark entries. Clicking the print icon opens a display optimized for printing If you use Internet Explorer, print this display with 'File' → 'Print'.

10.1.1 Creating New Folders

Before adding a new folder, determine where to place it. Mark the radio button in front of the new folder's parent folder then click the 'new folder' icon  in the upper right of the directory view. If no parent folder is selected, the new folder is added to the root folder. A form like that in Figure 10.2 on the next page opens in which to set the access permissions for the new folder and enter its name.

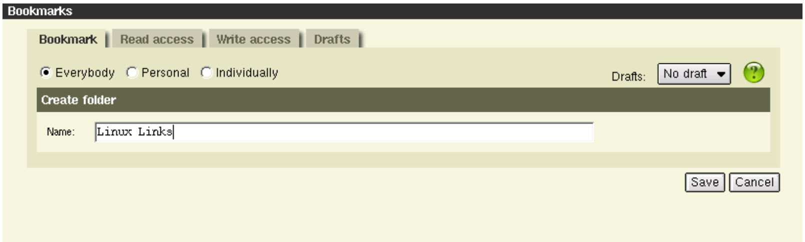


Figure 10.2: Creating Folders

> **Note**
>
> Different permissions may be assigned for bookmarks and folders. If folders and the bookmarks in it have the same permission settings, someone who can view the folder sees a complete content listing. Only bookmarks within a viewable folder can be viewed even if the bookmark has less restrictive permissions.
>
> **Note**

Click 'Save' to create the new folder. To abort the creation, click 'Cancel'.

10.1.2 Editing Folders

Select the folder to edit from the directory tree and mark its radio button. Next, click the 'Edit' icon, located to the upper right of the tree. If you have write permissions, this opens a form in which to change the permissions for the folder.

To save the changes, click 'Save'. To discard them, click 'Cancel'.

10.1.3 Deleting Folders

To delete a folder, select it from the directory tree. Click the 'Delete' icon, the trash can symbol. Then confirm the delete process.

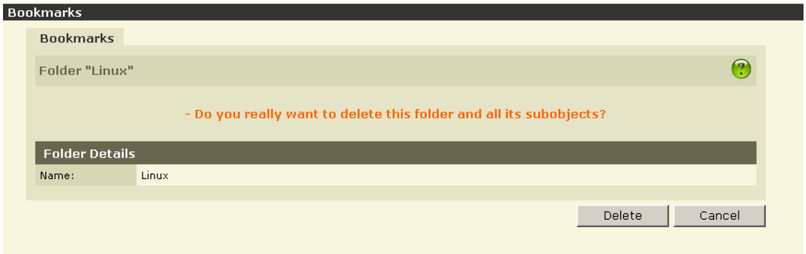


Figure 10.3: Deletion Confirmation

Caution

Deleting a folder also deletes all contained subfolders and bookmarks. You may only delete folders and bookmarks to which you have write access. If you do not have write access to the folder to delete or any subfolder or bookmark below it, an error message is displayed. The root folder may not be deleted.

Caution

To complete the delete, click ‘Delete’. To abort, click ‘Cancel’.

10.2 Opening and Viewing Bookmarks

To visit the link saved in a bookmark, click its title. To open the details page of a bookmark, locate the entry in the directory. Next, click the document icon of the chosen entry.

10.3 Creating a New Bookmark

Select the folder in which to save the new bookmark by marking its radio button. If no folder is selected, the new bookmark is added to the root folder.

Switch to the creation form by clicking ‘Create new bookmark’ . This opens a dialog in which to enter the bookmark’s description, URL, and access permissions.

Figure 10.4: *Creating a New Bookmark*

Note

All mandatory fields must be completed before the bookmark can be saved.

Note

10.3.1 Permissions

Specify the access permissions to the bookmark here. Set the permissions 'individually', give 'everybody' access, or make it 'private'.

10.3.2 Title

Enter the title by which to list the bookmark. Entering a title is *mandatory*.

10.3.3 URL

Enter the Internet address of the bookmark here. Entering a URL is *mandatory*. Do not forget to add a protocol (for example, `http://`) to the bookmark or it will not work.

10.3.4 Description

Enter the description of the bookmark here. Entering a 'description' is *mandatory*.

10.4 Modifying a Bookmark

Figure 10.5: *Changing a Bookmark*

To change the bookmark's entry, first open the bookmark's details page. Click the 'Edit' icon  to open a form in which to change the bookmark's description and link. From an overview, access this form by marking the bookmark's radio button and clicking 'Edit'. The significance of each field is described in detail in Section 10.3 on page 128.

To save the changes, click 'Save'. To discard the changes, click 'Cancel'.

10.5 Deleting a Bookmark

To delete a bookmark, mark its radio button in the overview. Next click the 'Delete' icon, located to the upper right of the directory. A confirmation dialog opens. To delete the bookmark, click 'Delete'. To abort the deletion procession, click 'Cancel'.

10.6 Moving Folders and Bookmarks

10.6.1 Defining the Sources

Enter moving mode by clicking the 'Move' icon  above the directory tree. This page, similar to that in Figure 10.6 on the next page, shows a folder struc-

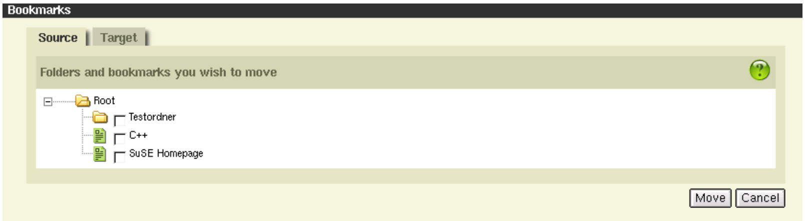


Figure 10.6: Selecting the Source Folder and Bookmark Entries

ture much like that in the main directory tree. Select the bookmarks and folders to move by checking the corresponding check boxes. Multiple items can be selected. All contents of folders will be moved as well when folders are selected.

Only folders and bookmarks to which you have access can be selected. The check box is grayed out otherwise.

10.6.2 Specifying the Destination

After choosing the sources, open the 'Destination' tab. Select the folder into which to move the selected bookmarks and folders by marking its radio button.

Figure 10.7: Selecting the Destination

10.6.3 Moving the Items

Confirm the move operation by clicking 'Move'. If you do not want to move the objects, click 'Cancel'.

Note

If you try to move the folder into itself or one of its subfolders, the system generates an error message.

Note

10.7 Searching Bookmarks

Figure 10.8: *Searching Bookmarks*

With the "Magic bar" (upper part of the page), directly search for a bookmark. Select a folder to search from the list then enter the search term in the text field. The results are shown on the 'List' tab. Access the detailed view of a result by clicking the  icon in the first column. Visit a bookmark by clicking its 'URL'. The page is opened in a new browser window.

Figure 10.9: *Bookmark Search Results*

10.8 Notes for Bookmarks

Notes can be attached to bookmarks. Switch to the 'Notes' tab to view a list of all notes about this bookmark. With the 'Create note' icon, write a new note about this object.

Permissions for notes are managed separately from the bookmark permissions. It is possible to add a private note to a globally-visible bookmark. More information about notes can be found in 2.4 on page 28.

10.9 Linking a Bookmark to Other Objects

Bookmarks can be linked to addresses, contacts, jobs, documents, projects, other bookmarks, and forums. Link the bookmark to other objects by first selecting the 'Links' tab from the bookmark's details page. All links already present are listed on this page. Create a link by clicking 'activate linking' then navigating to the details page of the target object. Select the 'Links' there then click 'Create' to establish the link. To leave the linking mode, click 'deactivate linking'.

Read access to the target object is required to view or create a link. More information about linking is available in Section 2.5 on page 29.

10.10 History

In the details page of a bookmark, a 'History' tab is also available. Use it to view information about which user originally created this entry and when it was created. Additionally view when the last changes were saved for this bookmark by which user.

Forum

In the forum module, talk with your colleagues. Every discussion is threaded to allow you to follow it easily. To get answers to postings or even whole forums as soon as possible, subscribe to them via e-mail. With the permission management system, access can be granted to external business partners.

11.1 Forum Overview

The forum overview summarizes all currently active discussion forums, as shown in Figure 11.1. Besides the forum's topic, the number of replies, the number of unread replies, how many threads exist, and when the last comment was made are also shown. Also see who moderates the discussion and when the forum was created.

Using the print icon, print all topics, shown in the list below. Clicking the print icon opens a new window in your browser, showing all entries optimized for your printer. Use the print function of your browser to output this list. For example, Internet Explorer provides access to this function with 'File' → 'Print'. The SUSE LINUX Openexchange Server print function is needed for proper output of the list. Change to the 'archive' tab to print a list of archived topics in the same way.

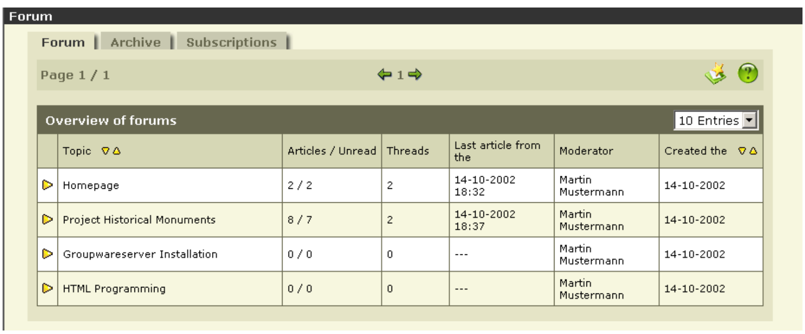


Figure 11.1: *The Forum Overview*

To create your own forum, click  .

By clicking a specific forum, open the detailed view of it. This view lists every single thread. If one thread contains more than one entry, extend the thread to show all subthreads by clicking the plus icon (see Figure 11.2 on the next page). To view a specific entry, click it.

11.2 Creating and Editing a Forum

To create a new forum, enter a forum topic first. For everyone to be able to access the newly created forum, select 'everybody' (see Figure 11.3). To limit the

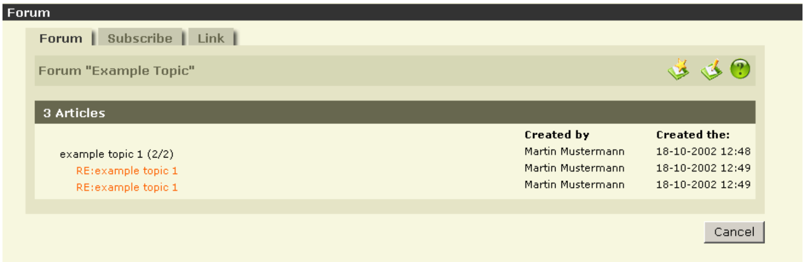


Figure 11.2: All Entries in a Thread

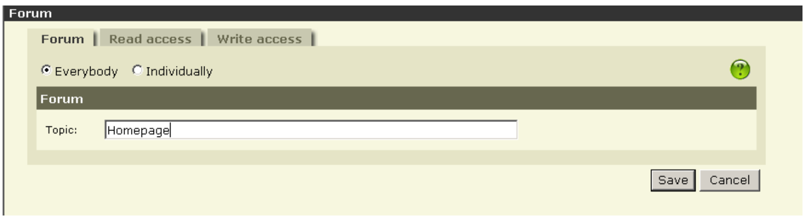


Figure 11.3: Creating a New Forum

access to specific people or groups, choose 'individually' then set up read and write access using the 'Read and write access' tabs.

After creating a forum, return to the overview of all forums. Usually, you would now start the discussion with the first posting.

When editing an existing forum, you have the option to 'archive' it. If you set this option to 'yes', the forum is moved to the archive and disappears from the overview of the currently active forums.

11.3 Creating a New Article or Responding

To post a comment in a forum, use  to open the appropriate form.

Besides the topic and the actual message, select whether to be informed via e-mail about every change in the forum. When you reply to an entry, your new entry is created at the appropriate place in the threaded structure.

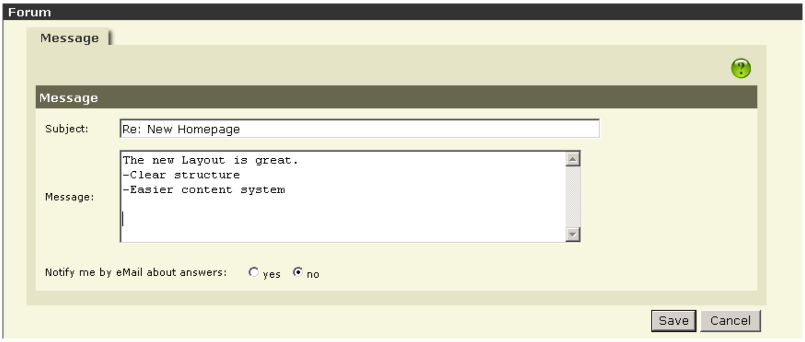


Figure 11.4: *Creating a New Entry*

11.4 Forum Archive

Usually forums are not deleted, but moved to the archive. This way, postings are still available even after a long time. By clicking 'Archive', access the archive overview. The archive is structured in the same way as a normal forum. You can add new postings or scan through the old ones. The main purpose of the archive is to keep old discussions out of the normal forum overview.

11.5 Deleting a Forum

To delete a forum with all threads, open the detailed view of the forum, click the green trash can icon, confirm your command. The trash icon is only available if you have proper write access to the forum.

11.6 Deleting a Thread

To delete a thread within a forum, open the detailed view of the thread, click the green trash can icon, and confirm your command. The trash icon is only available if you have proper write access to the thread.

11.7 Editing a Thread

To edit a thread within a forum, open the detailed view of the thread to edit. Click the edit symbol. To edit a thread, you must have proper write access to the thread.

11.8 Object Links in a Forum

To make a discussion easy to survey for every participant, it is sometimes useful to include an object in a discussion. This way, it is easier to create a basis for the discussion. To link an object to a forum, select the 'Links' tab. The same rules as for other modules apply here. Refer to Section 2.5 on page 29.

11.9 Subscribing

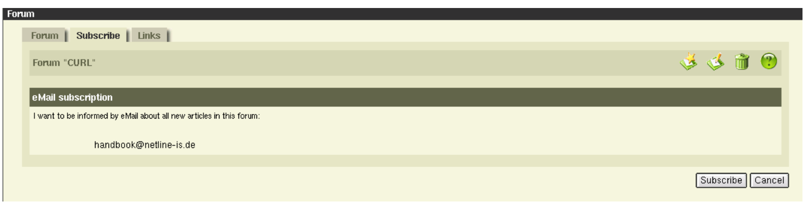


Figure 11.5: *Subscribing to a Forum*

To be aware of the newest entries in a discussion forum, subscribe to it. Whenever you add a reply to a thread, select to be informed via e-mail about every new posting in the forum or in your discussion thread. Subscribe to a forum in which you are not involved by opening the forum and selecting the 'Subscribe' tab. Then confirm your address by clicking 'Subscribe'.

11.10 Unsubscribing

To cancel a subscription, click 'Subscribe' while in the forum overview. This opens an overview of all your subscriptions. By clicking the check box to the left of the forum's name, select all forum subscriptions to delete. When finished selecting forums, unsubscribe from them by clicking 'Unsubscribe'.

Figure 11.6: *Subscription List*

Pin Board

Within the pin board module, you and your colleagues may place information as you would on a real bulletin board. There is no difference between a short message to all colleagues or a personal note. Entries on the pin board may also be displayed on the portal page.

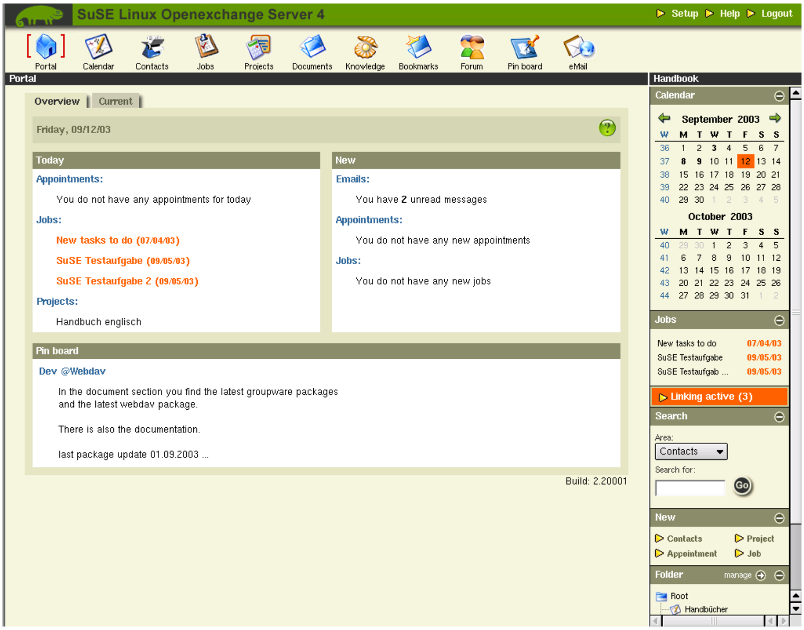


Figure 12.1: Showing Important Entries on the Portal Page

12.1 Pin Board Overview

The pin board shows the usual overview of all active pin board entries. Along with the topic of the messages, it also shows the creator and the time span the message should be active.

Every single entry can be opened in a detailed view by clicking to the left of the entry's title. To create a new entry, click the new entry icon. Older entries are stored in the archive and are still viewable.

12.2 Creating and Editing Entries

To create a new entry, first write a description. For the new entry to be accessible by everyone, set that by selecting 'everybody'. Make it only available to yourself by selecting 'private'. For only some selected people or groups to have

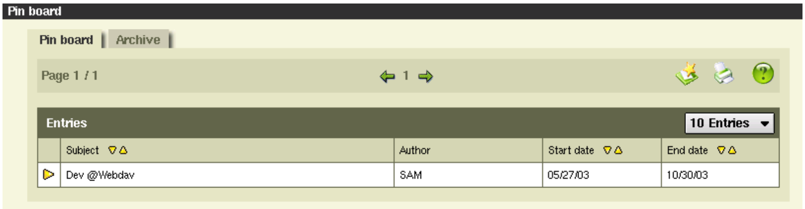


Figure 12.2: *All Entries at a Glance*

Figure 12.3: *Creating a New Entry*

access to the note, select 'individually' and configure the rights in detail using the 'Read and write access' tabs.

While creating an entry, decide with 'Display on portal page' whether the entry is shown on the portal page. Furthermore, by using 'Start' and 'End date', decide how long the entry stays on the pin board before it is stored in the archive. After creating an entry, you will be redirected to the overview of all messages.

You also can change pin board messages to which you have write access. To change an entry, just click the 'Edit' icon at the upper right border. Changes to an entry are documented in a history. The history may be accessed with the 'History' tab when viewing single entries.

12.3 Printing

Click the print icon () to print a list of all pin board entries mentioned in the pin board overview. A print optmized form including all pin board entries in a tabular view are displayed in a new window. Use the print function of your web browser to print this. If you use Internet Explorer, print with ‘File’ → ‘Print’.

12.4 Deleting Entries

To delete an entry, open the detailed view of the specific entry. Click  in the upper right corner to delete the entry. Then confirm the security check question and the entry will be deleted.

13

E-Mail

The e-mail icon in the main toolbar opens the e-mail management system of the web interface. Use it to read your e-mail, write new e-mail, or simply manage all your e-mails. The complete functionality of the WebMail module eliminates the need for an external e-mail client.

13.1 Logging in and Logging out

You do not need an additional e-mail program outside Webmail as it is an integral part of the web interface of the SUSE LINUX Openexchange Server. It can handle logging into and out of the mail server. To leave the Webmail module, click 'Logout' in the menu on the left side of the page. A short system note informs that you successfully logged out of the system. After approximately three seconds, the browser window that previously contained the Webmail interface closes itself. If you do not perform any actions inside the Webmail client, you will be logged off automatically after a certain amount of time.

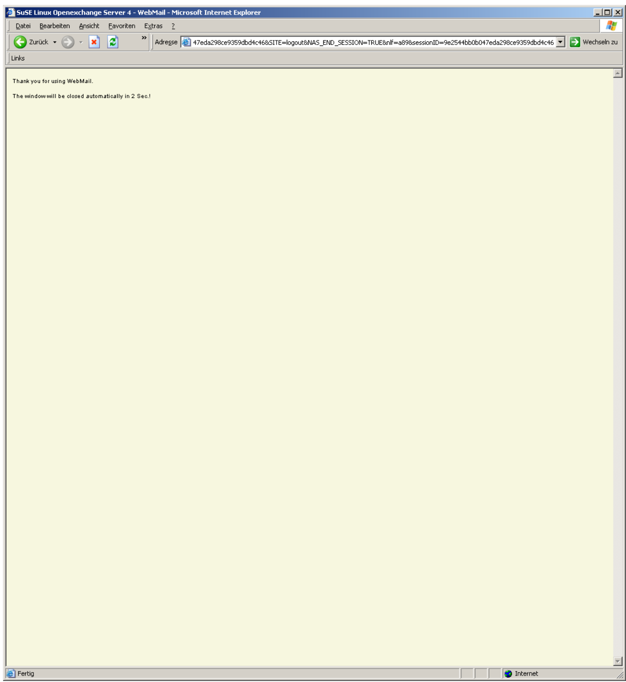


Figure 13.1: Closing the Webmail Client

13.2 Navigating the Module

The Webmail window is divided into three frames, each with a different functionality. Refer to Figure 13.2 on the facing page.

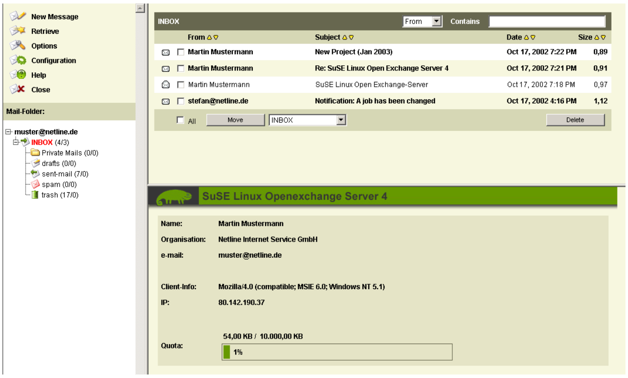


Figure 13.2: Overview of the WebMail Client

13.2.1 The Menu Bar

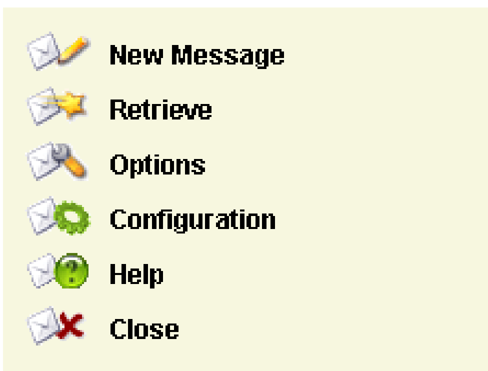


Figure 13.3: Menu Bar of the Webmail Client

The left frame of the Webmail client is divided into two sections. The upper part contains a menu with which to access the different functions in the Webmail interface (refer to Figure 13.3). Directly access the following areas:


New Message Using the links, access the dialog to create a new e-mail. The dialog is opened automatically in a new window. Additional information about writing an e-mail can be found in Section 13.5 on page 159.


Receive Follow this link to open a folder with all incoming e-mails. This is the default window shown every time you open Webmail.


Options Use this link to open the configuration menu in which to specify your personal settings for Webmail. The configuration menu is opened in a new window. Additional information about changing your personal settings can be found in Section 13.9 on page 164.


Configuration Follow this link to access the more general configuration of the entire intranet portal.


Logout Use this link to log out from the Webmail client, but not from the entire application. Additional information can be found in Section 13.1 on page 146.

13.2.2 WebMail Directory Overview

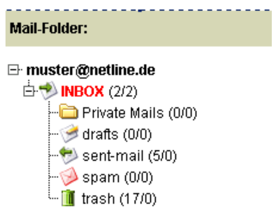


***Figure 13.4:** Overview of E-Mail Folders*

The left frame in Webmail is divided into two parts. The lower one contains a hierarchically structured overview of the e-mail directory, shown in Figure 13.4). The SUSE LINUX Openexchange Server webmail client provides several predefined folders, which you can access at once, using this frame. The frame itself contains the following information and folders:

Account name The first entry in this frame is the account name currently used. It matches the e-mail address used to reach you in the SUSE LINUX Openexchange Server. For example, the user name in the figure above would be `muster@netline.de`. All other directory entries can be found below your account name.

INBOX The folder `INBOX` is the actual mail box of your account. It contains all your incoming e-mail messages. Next to the folder's name, see two numbers, for example, `(14/0)`. The first number is the number of e-mails currently available in the folder. The second number is the number of unread or unopened mails. In this case, no new messages are available in the INBOX. Click the folder's name to view its contents in the right frame of the window. Refer to Chapter 13.2.3 on the following page.

drafts The folder `drafts` contains your templates for creating e-mail messages. All e-mail messages may be moved there to serve as templates. Next to the folder's name, see two numbers, such as `(10/0)`. The first number is the number of e-mails currently available in the folder. The second number is the number of unread or unopened mails. In this case, no unopened messages are available in the drafts folder. Click the folder's name to view its contents in the right frame of the window. Refer to Chapter 13.2.3 on the next page.

sent-mail The folder `sent-mail` contains all e-mail messages sent using this account. Next to the folder's name, see two numbers, for example, `(14/0)`. The first number is the number of e-mails currently available in the folder, in this case, fourteen. Click the folder's name to view its contents in the right frame of the window. Refer to Chapter 13.2.3 on the following page.

spam The folder `spam` contains all e-mail messages received with this account that have been identified as "spam" by the mail filter. SPAM mails are automatically moved into this folder. Next to the folder's name, see two numbers, for example, `(14/0)`. The first number is the number of e-mails currently available in the folder, in this case, fourteen. Click the folder's name to view its contents in the right frame of the window. Refer to Chapter 13.2.3 on the next page.

Note

Identifying SPAM

Which messages are marked as "spam" depends on your configuration. Specify yourself which indicators must be present to declare a message spam. Also specify what to do with spam mail, usually moving it into this folder.

Note

trash The trash folder is the recycling bin of the Webmail client. All e-mail messages are placed here if you delete them. If you remove a message from the trash can, it is deleted permanently. Click the folder's name to view its contents in the right frame of the window. Next to the folder's name, see two numbers, for example, `(14/0)`. The first number is the number of e-mails currently available in the folder, in this case, fourteen. Click the folder's name to view its contents in the right frame of the window. Refer to Chapter 13.2.3.

Additional Folders It is possible that additional folders are also displayed in this list. These are folders you created yourself, for example, to store your private mails. Create folders in the personal settings menu of your SUSE LINUX Openexchange Server.

13.2.3 Mail Directory Overview

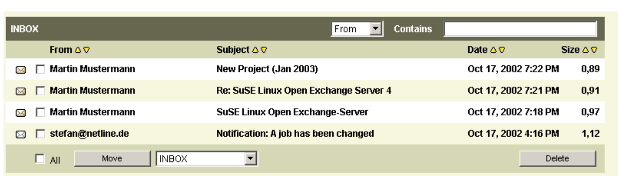


Figure 13.5: *Overview of Current Mail Folder*

Inside this frame, view a list of all e-mail messages stored in the selected e-mail folder. See Figure 13.5. For directions for switching to other folders, refer to Section 13.2.2 on page 148. More information regaring how to open other folders is available in Section 13.2.2 on page 148. When opening Webmail, this window usually lists all incoming mails. The grayed title bar shows which folder actually is opened.

Searching for Mails

In the title bar, also find a form to use to search for e-mails in the current folder. Select the search criterion from the list. Enter the search term in the middle text field. The following criteria are available:

From If you specified this search field, Webmail looks for all messages in this folder sent by the person entered in the text field. You may also enter the sender's e-mail address.

To If you specified this search field, Webmail looks for all messages in this folder sent to the person entered in the text field. You may also enter the receiving e-mail address.

CC CC means "Carbon Copy". It is used for sending a copy of an e-mail to additional addresses. If you specified this search field, Webmail looks for all messages in this folder for which a carbon copy was sent to the person entered in the text field. You may also enter the receiving e-mail address.

Subject If you chose this criterion, Webmail searches for all e-mail in the current folder whose subject lines match your search term. Simply enter the content of the subject line in the text field.

Mail text With this, Webmail looks for all mails in the current folder that contain the entered search term in their message body. Simply enter the text to locate in the text field.

E-Mail Overview

The tabular overview of all e-mails in the folder is structured in rows. All information regarding a particular e-mail can be found in the same line. The first column indicates whether you have already read an e-mail or answered notifications to confirm new appointments or jobs. Additionally check if the message has an attachment:

 Mail is unread. Also displayed in **bold**.

 Mail has been opened.

 Mail has been answered.

Mail has an attachment.

The address of an e-mail's sender can be found in the second column. If you are looking at the `sent-mail` folder, the recipient address is listed in this column instead.

The third column of the table contains the e-mail's subject. This is normally a brief description of the topic of the message. The last two columns display the date on which the message arrived and its size including all attachments.

The listed messages can be sorted according to the different columns. Click the and symbols in the title row of the table to sort the messages. sorts from `'A'` to `'Z'`. sorts the column from `'Z'` to `'A'`.

To open an e-mail to read or use it, click the sender or subject entry. The lower frame of the Webmail interface then displays the message.

If you receive an e-mail notification regarding new appointments or jobs, confirm or decline them by using your webmail client. Your inserted answer will be forwarded to the SUSE LINUX Openexchange Server database automatically. If you recive such a notification, a new pop-up window opens in which to accept or decline the new job or appointment. To decline a job or appointment, mark 'Decline'. To accept, mark 'Accept'. Use the text field below to add a short note. Send your response by clicking 'OK'. If you do not want to answer the incoming notification, click 'Cancel'.

Note

If you open the notification mail for a second time, the pop-up dialog does not reopen. To accept or decline a job or appointment, use the groupware modules jobs and appointments manually.

Note

If sender has enabled 'Disposition-Notification' in a mail, a pop-up window is opened at once. Use the dialog shown to send an e-mail confirming that you have received the message. To send this notification, click 'OK'. If you do not want to confirm reception of this mail, click 'Cancel'. To disbale this kind of notification pop-up window, change your personal settings. Notifications already answered are marked with a small icon in your INBOX folder ().

Delete messages from the list or move them to other folders. To delete a message, activate the check box in front of a mail in the e-mail overview then click 'Delete'. For information, refer to Section 13.8 on page 164.

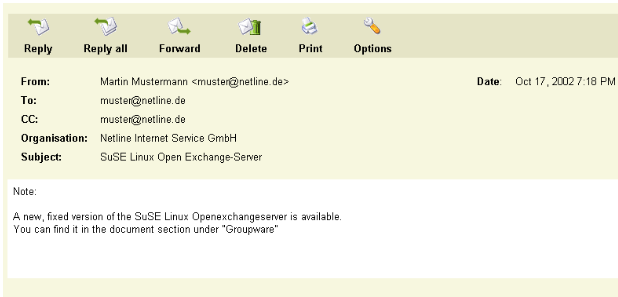


Figure 13.6: *A Mail's Detailed View*

13.2.4 Message View

When opening the Webmail client, see some status information about your connection and browser in the details page. Additionally, see your name, your company's name, your e-mail address, and your IP address. This information does not have a special significance.

If you opened an e-mail, this frame shows the message's content and you can read or process it. See Figure 13.6. For example, write an answer to the mail, print it, or forward it to someone else. Additional information can be found in Section 13.4 on the following page.

13.3 E-Mail Notification

Received e-mail messages are automatically transferred to your INBOX folder. The SUSE LINUX Openexchange Server web interface offers several methods for notifying you of new e-mail. One way is to use a pop-up window opened each time a new e-mail message is received. Another way is a blinking e-mail icon in the navigation bar. Also available is sound notification — playing a sound every time you receive a new e-mail. These notifications can be used together or alone. To configure your notification method, modify your profile.

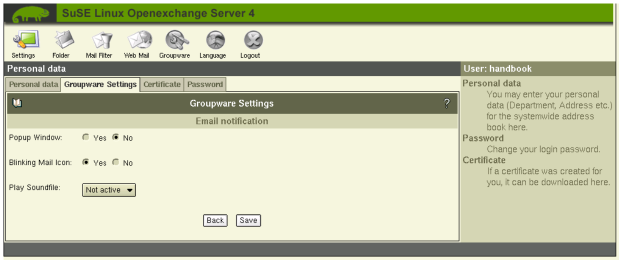


Figure 13.7: *Modifying New Mail Notification in Your Profile*

13.4 Reading and Processing E-Mail Messages

If you selected an e-mail from the folder overview, see its details in the lower right frame of the interface. Click the buttons along the upper border of the frame to activate a function. Information about the sender and receiver of the mail and its date is highlighted in yellow. The text is written in black on a white background. Below the e-mail's text, see a list of all attachments. Attachments are marked with an attachment icon .

If the file format of the attachment is known to your browser, dirctly show the attachment in the e-mail's detailed view. To include an attachment in the detailed view, click .

To disable this detailed attachment view again, click .

13.4.1 Opening and Saving Attachments

To save an attachment on your hard disk, click . In the emerging dialog, select 'save' and specify where to save the file. To view an attachment directly, click the document's name. The document is displayed in a new browser window, if possible. Otherwise, download it.

13.4.2 Jobs and Appointment Notification

If you receive e-mails regarding new appointments and jobs mentioning you as a participant automatically generated by SUSE LINUX Openexchange Server, accept or decline this directly out of your webmail client. Your response is taken into the groupware database. If you receive an SUSE LINUX Openexchange Server–generated appointment or job query, a new pop-up window opens when you click this mail for the first time. To accept a new appointment or job, click ‘Accept’. To decline a query, select ‘Decline’. Using the text field, add a short note regarding the reason for your response to a query. To send your response, click ‘OK’. If you do not want to answer the query, click ‘Cancel’.

When opening a job or appointment notification e-mail for the second time, the pop-up window does not reopen. To accept or decline such a message, go to the appointment or job module to answer the query manually.

13.4.3 Confirmation

If the author of an e-mail had activated the confimation option, the webmail client asks you to confirm that you have received the incoming message. To confirm, press ‘Ok’. Click ‘Cancel’ if you do not want to confirm an incoming message. To disable pop-up windows for e-mail confirmation, go to your e-mail configuration setup and deactivate this setting.

13.4.4 Saving Contacts

You can add e-mail addresses from an e-mail directly to your address book. To do so, click the little green icon to the right of the e-mail address. The e-mail address is then stored as a new contact. In the contact edit form, add additional information for this contact.

13.4.5 Functions

If you received an e-mail and opened it in the details view, you have several possible functions. These possibilities are displayed in the toolbar along the upper border of the display frame. The following are available:

Answer To reply to the currently displayed e-mail, click this icon. A new window containing the form for writing a new message opens. It is described in Section 13.5 on page 159. The content of the e-mail to answer is “quoted” and copied to the message body of the e-mail. Additionally, the sender of the original message is automatically entered as the receiver of your response. The subject is copied as well with `Re:` (meaning Reply) before it. This allows for easier referencing.

Answer all This sends a response to everyone who received the original message. The form as described in Section 13.5 on page 159 opens. The fields 'Subject', 'To', and 'Content' are handled as with 'Answer'. However, every user that received a copy of the original mail is added to the recipient list.

Forward In practice, you will sometimes receive an e-mail that was not intended for you or one that is also interesting to your colleagues. The function 'forward' is used in these situations. If you click it, the creation form for a new e-mail opens. The 'Subject' contains the subject of the original message with `Fwd:` before it. Enter the new recipient in 'to'. The message's content and attachments have been included automatically.

Delete In the detailed view, you can also delete an e-mail. Simply click 'Delete'. The deleted mail is not removed completely from the system. It is moved to the trash folder.

Caution

Deleting

You will not be asked whether to move the message. It is moved to the trash directly.

Caution

If you later delete the mail from the `Trash`, it is removed from the system.

Print In the message's detailed view, click 'print' to reach your printer menu (refer to Figure 13.8 on the next page). Specify all settings as usual before printing the message. Confirm your settings and start printing by clicking 'print'.

Options If you click the options icon in an e-mail's details page, a dialog opens in which to change the status of the e-mail, export it, or view its source code. The following options are available:

E-Mail Status In this menu, change the status of the e-mail. Select the desired state from the list. An e-mail can be read or unread.

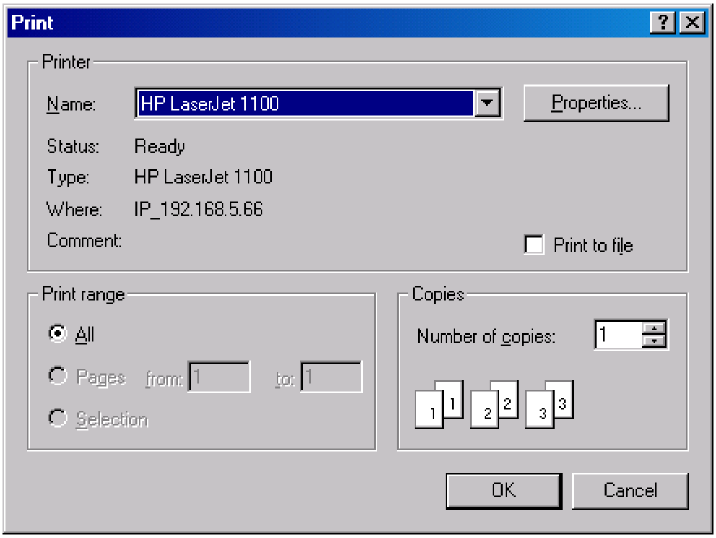


Figure 13.8: Printer Settings Dialog

Figure 13.9: Changing an E-Mail's Status

Export With this option, export an e-mail's content. Select the option and click `message.eml`. The e-mail can then be placed in the desired directory.

Mail Header and Source Code With this option, view the header data of the e-mail message. The address of the sender and recipient can be considered the most important information. In the header information of an e-mail, other information that may also be of interest can be found.

Mail Header Find the following information in the header view:

Return-Path: This field contains an entry from the mail host that delivered this mail. This information is included to ensure a return path to the sender of the e-mail. It is usually identical to the value in 'From'.

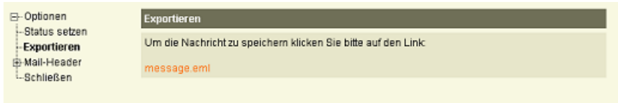


Figure 13.10: Exporting a Message as a Text File

Figure 13.11: Viewing a Mail Header

X-Sieve:

Received: With these, see the path the mail took to reach you. Usually a mail is not sent directly from the sender to the receiver. It is relayed along a number of hosts. The entry has the following structure:

- **Received from Mail:** Name of the sending host
- **By:** Name of the receiving host
- **With:** Name of the protocol used
- **ID:** An identification number assigned by the receiving host
- **For:** E-mail address of the intended recipient of this message
- **Date:** Date and time on which the e-mail was received by the host

If more than one host is used to relay the message, every host will add its own line.

Message-ID: This entry shows a unique ID assigned by the sending host.

From: This entry contains the e-mail address of the sender.

To: This field contains the primary recipient's address.

Reply-To: This field contains an e-mail address of the sender to be used for responses.

CC: This entry contains the e-mail addresses that should receive a copy of this mail.

Subject: The message's subject.

Mime-Version: This entry contains the MIME version used by the sender. MIME stands for Multipurpose Internet Mail Extension and is a widely used e-mail standard. Depending on the used MIME version, additional mail formats may be used. This is the only way to include data that is not text in an e-mail. Modern MIME versions allow simultaneous use of graphics, audio, and text in a single message.

Content-Type: According to the MIME standard, the different content formats of an e-mail are divided into categories. It usually differentiates between text, graphical, and audio elements. The categories of data this mail contains is specified here.

Content-Transfer-Encoding: This entry details the MIME encoding method used to transmit the nontextual data of this e-mail.

X-Mailer: This entry shows the name of the mail client that created this e-mail. This entry is optional and not all mail clients specify it.

X-Priority: This entry details the priority of this message. Some mail clients, like Webmail, allow e-mails to be marked with different priorities. Mail clients that support this function usually highlight messages of a higher priority.

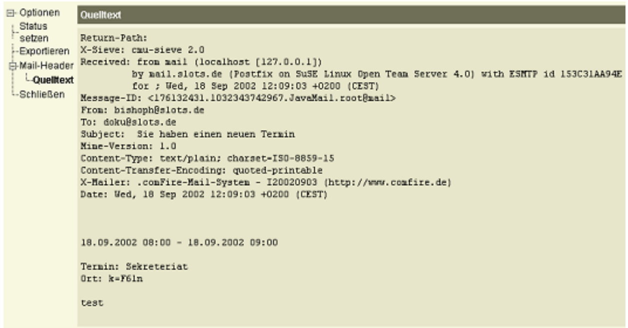
X-Confirm-Reading-To: Some e-mail clients, like Webmail, allow a confirmation. Once the e-mail is opened by the mail box's owner, a message is sent to the sender. Whether this option is activated can be found in this header.

Date: This entry contains the date and time on which the message was sent. As e-mails are a global means to communicate, time zone information is added as well.

All information that can be found in the mail headers is available in the source code as well. Additionally, see the message's content. See Figure 13.12 on the following page.

13.5 Writing New E-Mail Messages

Click 'New message' in the left frame of the Webmail client. A window containing a form for writing a new message opens. It resembles that in Figure 13.13 on page 161.



Mail Source Code *Figure 13.12: E-Mail Source Code*

13.5.1 Recipients

To

Enter the e-mail address of the receiver here. All recipients of this message can be seen by any other with the exception of those entered in 'BCC'. Those will not be known to any of the other recipients.

CC

CC means *carbon copy*. To send a copy of this message to other addresses, enter them here. Separate addresses with commas.

BCC

BCC stands for *Blind Carbon Copy*. Enter additional addresses that should receive a copy of this e-mail here. To enter more than one address, separate them with commas. Recipients listed in the BCC field are hidden from other recipients of this mail.

Selecting from the Address Book

To select an address from the address book when writing a new mail, click one of the address buttons. The address book opens and you can select mail addresses of contacts to whom you have read access. The form for choosing an address appears in the lower part of the mail form and can be used for selecting To, CC, and BCC entries.

Use the magic bar near the upper border of the window to search the address directory for a contact. Wild cards may be used when entering a seach term. In

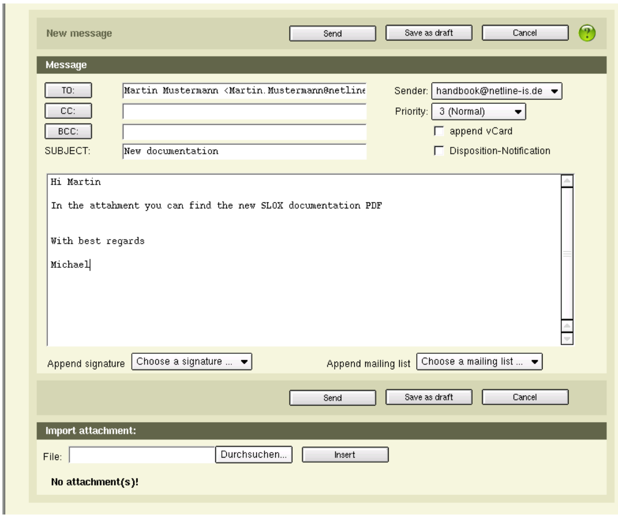


Figure 13.13: The Editor Window

the field to the right, select the field to search (internal users or contacts). After selecting an area and entering a search term, start the search by pressing ↵.

View an alphabetically sorted list of contacts below the alphabet menu bar. Use it to look up contacts alphabetically.

Select the contact to which to send an e-mail from the list. Then select whether the address should be added to 'TO', 'CC', or 'BCC' and click 'insert'. To discard your choice, click 'reset'. Close the pop-up window of the browser. The chosen contacts' e-mail addresses have been added to the respective fields in the mail form.

13.5.2 Subject

Enter a short text describing the topic of this e-mail into the subject line. For clarity, the subject should be short but meaningful so the recipient can easily interpret it.

13.5.3 Content

Enter the text of your message into this field. Usually the content of an e-mail is structured in the same way as a memo or letter. Within a team, a shorter style is usually used. When addressing external business partners, heeding certain conventions is advisable.

13.5.4 Font Encoding

The webmail client allows you to write e-mails using foreign or special font types. Using this option, choose the font enconding to use for this e-mail. UTF8 is the best value for writing e-mails using foreign font types.

13.5.5 Sender Domain

Select the desired sender domain from this field. Usually, the default value is correct.

13.5.6 Priority

Specify the priority of this e-mail here. Select one of five priorities ranging from `Highest` to `Lowest`. The default is `normal`. Some mail clients, like Webmail, highlight mails of a higher priority. However, not all mail clients support this function and even fewer users pay attention to the priority of a mail.

13.5.7 Append vCard

Activate this check box to attach your electronic business card. This makes it easier for recipients to add your contact information to their address books.

13.5.8 Confirmation

If you activate the option and the receiving mail client supports this function, a confirmation is sent to you after the mail is opened in the recipient's client. The recipient can also decide whether to send the confirmation.

13.5.9 Adding a Signature

A signature is a kind of footer added to the end of the e-mail. Signatures usually contain information you want to add to every message. This may include your name, the company's name, and telephone number. The Webmail client allows a number of signatures for different uses. In the e-mail creation window, only signatures already present in the system are available. Select a signature from the list. Learn how to create your own signatures in Section 13.9.3 on page 167.

13.5.10 Inserting a Mailing List

You may create mailing lists in the Webmail client. These are address lists used to group e-mail addresses. To find out how to create mailing lists, refer to Section 13.9.4 on page 167. Existing mailing lists can be selected from the list. Your e-mail message is then sent to each address in the list.

13.5.11 Importing an Attachment

Files can be added to your e-mail. Click 'Browse' to search your hard disk for the file to attach to the message. Upload the file by clicking 'Insert'. Repeat this process to add additional files.

If you are attaching a large file to the e-mail, it is advisable to compress it. If a message is too large, it might be rejected by the mail server, for example, if the recipient's mail box exceeds a quota or if a mail filter on the server refuses messages above a certain size. Grouping several small files to one archive is also advisable as it saves work when downloading the attachment.

13.5.12 Sending the E-Mail

When satisfied with the settings and text, send the mail by clicking 'Send'. To discard this e-mail, click 'Abort'.

13.6 Writing SMS and Fax Messages

If the ferrari fax module is installed on your SUSE LINUX Openexchange Server, write and send faxes and SMS messages with your webmail client. Using this unfied messaging service is as easy as writing simple e-mails. The only difference is the receiver to add. To add an SMS or fax receiver, press 'TO' button. Instead of an e-mail address, select a fax or mobile phone number. The number is then inserted in the receiver field of your message. Depending on the type of address chosen, SUSE LINUX Openexchange Server handles the message in the proper manner. SMS and faxes are sent in the right format to the right address. If you want to add an mobile phone or fax number manually, use the following syntax `number@fax.yourdomain.com` or `number@sms.yourdomain.com`. In both cases, number is the number of the mobile phone or fax to which to send your message. yourdomain.com is the domain name of your company.

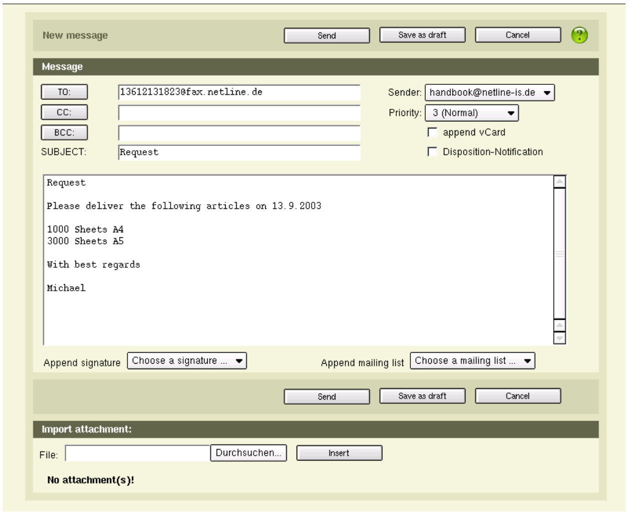


Figure 13.14: *Sending Faxes and SMSs from WebMail*

13.7 Moving E-Mail Messages

To move an e-mail from one mail folder to another, open the webmail overview of the folder containing the message to move. Activate the check boxes in front of all mails to move. Then click 'Move' and select the target folder to which to move these messages.

13.8 Deleting E-Mail Messages

To delete an e-mail message from a folder, open the folder's view. Next, mark the check box of all messages to delete. Then click 'Delete'. All selected messages are then moved to the `Trash`. To remove them permanently, delete them from the trash folder as well.

13.9 Personal Settings

To adapt the mail module to your needs, click 'Options' in Webmail's menu bar. In the window that opens, configure the mail editor, enter a signature, or create a mailing list.

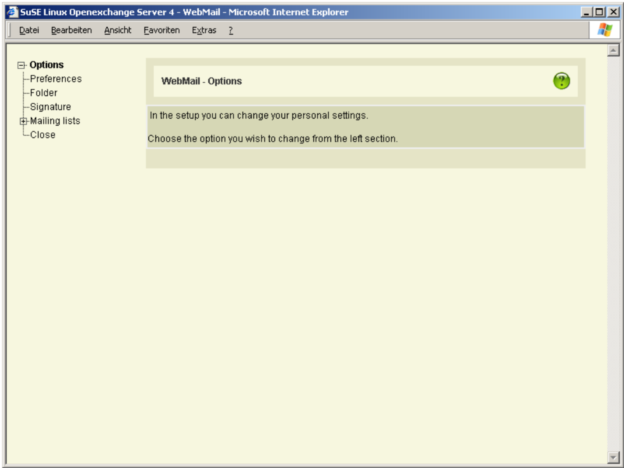


Figure 13.15: *Creating Custom Mailing Lists*

13.9.1 Changing the Defaults

Change the general settings of Webmail in the first menu (see Figure 13.15).

Layout Select a font type, size, and color to use. When content with the chosen layout, click 'Apply'.

Page Size For people that receive large amounts of e-mails, it can be useful to have the list of e-mails broken down into several pages. Select whether all mails should be listed on a page or the number of e-mails displayed on the same page should be limited.

Delete E-Mail Instantly When deleting an e-mail, it is usually moved to the trash folder from which it can still be opened and moved. For mails to be deleted instantly instead, select 'Yes'.

Standard E-Mail Address Each user can be provided with multiple e-mail accounts by the system administrator. Using this option, select which of these accounts should be used as the default for sending messages.

Reply-To A response to an e-mail is normally addressed to the sender address. For answers to e-mails you send to be sent to a different address, enter it in this field.

Quoting If you choose 'yes' here, the original mail's text is "quoted" and included in replies. This is useful to let the receiver know to which e-mail you are responding.

Save When Sending To keep a copy of all e-mails that you send, select 'yes'. A copy of every mail sent is then placed in `INBOX.sent-mail`.

Inline HTML It is possible to send messages in standard text format as well as mails in HTML syntax. Such HTML mails can only be viewed in a proper way if you activate this option. To do so, click 'yes'.

Attach vCard Use this option to attach your vCard automatically to every outgoing mail.

E-Mail Header

Use this option to add additional header fields to the detailed view of an e-mail. Enter the title of the additonal header to in the text field. If multiple additional header files should be shown, separate the entries with semicolons.

Confirmation

To be informed of e-mails with a confirmation query, activate this option. Each time you open an e-mail with a confirmation query, a new pop-up window opens with which to send the confirmation message.

When content with your personal settings, click 'Apply'.

13.9.2 Selecting the Standard Directories

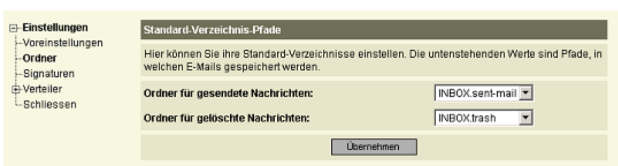


Figure 13.16: *Adapting the Mailer's Behavior*

Click the 'folder' entry in the personal settings menu to specify the directories in which to place all deleted and sent mail. By default, they are placed in `INBOX.trash` and `INBOX.sent-mail` respectively. To confirm the changes, click 'Apply'.

13.9.3 Managing Signatures

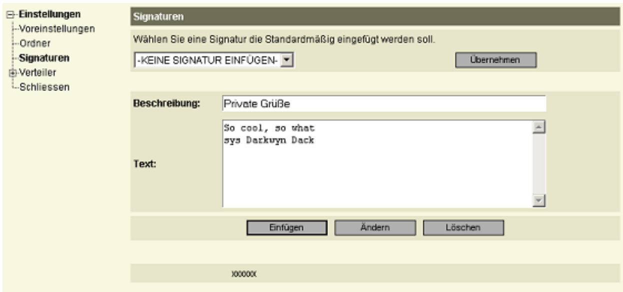


Figure 13.17: *Managing Signatures*

To create a new signature, first enter a meaningful description in 'Description'. This is name under which the signature is listed. Enter the text for the signature in 'Text'. Usually, closing greetings and contact information are added to the signature. When satisfied, click 'Insert' to save the signature.

To edit a signature, select it. The signature's description and text then appear in their respective fields. Change them as desired and save the changes by clicking 'Change'.

To delete a signature, choose the desired signature from the list. Again the description and text appear in their respective fields. To delete the signature, click 'Delete'.

To select the signature to append to your mails by default, select it from the list then click 'Apply' to make it the default signature. If you do not want to insert a signature by default, choose '-INSERT NO SIGNATURE-'.

13.9.4 Managing Mailing Lists

Often e-mails should be sent to groups of receivers. For this purpose, group common combinations of addresses in mailing lists. Do so with the 'Mailing lists' entry. When writing a new mail, choose one of these lists to have Webmail fill in all corresponding fields with the appropriate settings.

Click 'mailing lists' to see an overview of all existing mailing lists. The menu contains options to 'Create' a new mailing list and to 'Edit' existing lists. When creating and modifying mailing lists, a form opens in which to specify all details of a mailing list.

Figure 13.18: *Creating Mailing Lists*

Figure 13.19: *Adding Address Book Addresses to a Mailing List*

In the details form, first enter a name for the mailing list. Below the field for the name, see the three choices for entering a receiver address — 'To' for the primary recipients, 'CC' for those who should receive a copy, and 'BCC' for sending blind copies. An explanation of these fields can be found in Section 13.5 on page 159. Enter the recipients' addresses in the fields either by entering them directly in the text fields or by selecting them from the address book. Next, click the receiver field's name to add the address to the list.

To add an e-mail address from the address book, simply choose a letter and all entries beginning with that letter are listed. After selecting all e-mail addresses for this mailing list, click 'Apply'.

ISlox Folder Management

The ISlox folder management can be used as a company-wide folder management in which to add special calendars, address books, and schedule lists with jobs of current interest. A directory helps manage all stored objects. Appointments, contacts, and jobs stored in an ISlox folder are included in your global contact, calendar, and job view as well.

14.1 ISlox Folder Overview

This page contains the folder view of the ISlox management. Click the plus sign to the left of a folder name to open another branch displaying the contents of the folder. If no plus sign is displayed, the folder is empty or contains only folders or objects to which you do not have access.

To view an object, click the symbol to the left of the object's name. To view the details of an object entry, click the object's name. To move an object or folder, click the move icon.

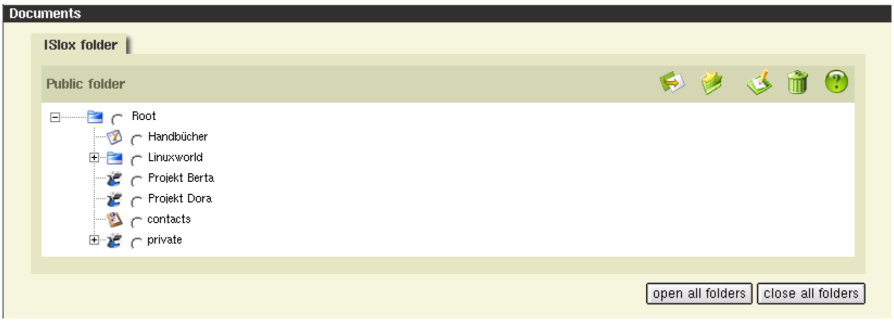


Figure 14.1: *Directory Containing ISlox Folders and Objects*

14.2 Creating a New ISlox Folder

To create a new folder, select the folder in which to create the new subfolder and click . If you did not choose a parent folder, the new folder will be created in the root folder.

Use the check boxes to define the kind of ISlox folder to create. There are four kinds of folders from which to choose.

- Calendar
- Jobs
- Contacts
- Unbound folders

Select the desired option. You can only create objects of the specified type in this folder. Use 'folder name' to give the folder to create a title. Use the tabs to set read and write permissions for objects and the folder itself. The contents of ISlox folders are displayed in the web client appointment, jobs, and contacts modules as well.

Note

Unbound folders cannot be opened using the web interface. This type of folder is only needed for some stand-alone groupware clients, like MS Outlook.

Note

14.3 Editing Folders

To edit a folder, first select it by clicking the radio button to the left of the folder's name. Then click . An edit dialog in which to change the folder permissions and folder title opens. You cannot change the folder type once it is created. To apply your changes, click 'Apply'. If you do not want to save the modifications, click 'Cancel'. You cannot edit folders to which you do not have write access. If you try to open such a folder, SUSE LINUX Openexchange Server generates an error message then returns the ISlox overview after several seconds.

14.4 Deleting ISlox Folders and Objects

To delete a folder and all its subfolders and objects, select then click . You can only delete a folder if you have write access to it and all subfolders and objects it contains. The root folder cannot be deleted.

Caution

Consequences

Deleting the folder additionally deletes all subfolders and objects it contains. All jobs, appointments, and contacts stored in this folder vanish. You can only delete document folders if you have write permissions for the folder and all subfolders and objects stored in it. If you do not have proper permissions for the folder and all contents, SUSE LINUX Openexchange Server provides an error message and redirects to the overview page of your ISlox folder management (see Figure 14.2).

Caution

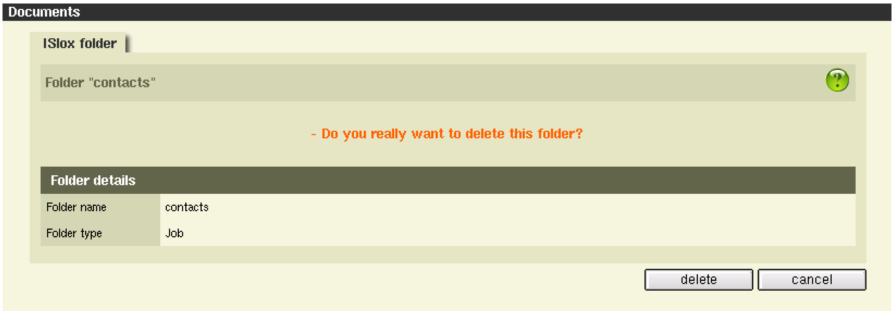


Figure 14.2: *Delete Confirmation*

14.5 Moving Folders and Objects

14.5.1 Defining Source Objects

To move an object or folder, click 'Move' in the directory overview. Similar to the iSlox main page, this leads to a tree-like directory structure. Here, select which folders to move by clicking the appropriate check box. To move one folder including all its subfolders, only mark the folder. All its contents are included automatically.

Moving folders and objects is limited by the set of permissions you hold for the particular object or folder. You are allowed to move folders to which you are granted write access. The check boxes next to a folder appear in white when you are allowed to move them and in gray when you are not.

14.5.2 Selecting the Target Folder

When finished your selection, choose the target folder in 'targets'. Activate the radio button in front of the folder to which to move the sources.

14.5.3 Starting Moving

To start moving all selected source objects, click 'Move'. To abort, click 'Cancel'.

Note

Folders and Subfolders

If you try to move a folder into itself or of its subfolders, SUSE LINUX Openexchange Server displays an error message. Moving a folder into itself or one of its subfolders is an invalid operation.

Note

14.6 Read and Write Permissions of ISlox Folders

ISlox permission management works differently than read and write permission in the rest of the groupware application. When you create or edit an folder, specify read and write permissions of the folder as usual. Additionally, specify default read and write permissions of objects stored in a folder. Additionaly specify a delete right for the folder , but not for the objects stored in this folder. Objects stored in subfolders are untouched by the object permission setting in this dialog. Specify their write and read permissions in the permission setting of the subfolder.

15

Server Configuration Files

SUSE LINUX Openexchange Server uses several files to configure the settings of your SUSE LINUX Openexchange Server. Changes in each of the configuration files changes server settings for all users. The configuration files allow you to edit the functionality of your calendaring system as well as time zones and currencies that your server should provide by default. The configuration files of your SUSE LINUX Openexchange Server are stored in `/opt/comfire/application/etc` and `/opt/comfire/application/webmail/config`.

15.1 Available Files

The following configuration files are covered in this chapter:

`calendar.conf` Configure your calendar module

`currencyformat.conf` Set up the currencies that should be provided by the web interface

`dateformat.conf` Set up the the date format

`intranet.conf` Configure the appearance of the web interface

`projects.conf` Configure the project module

`tasks.conf` Configure the job module

15.2 Configuring the Calendar Module

With the configuration files of your calendar module, define which of the functions of the calendar module should be usable by the users of your groupware. To make configuration easier, the configuration file is divided into several sections.

15.2.1 Notifying Participants

If a new appointment is created, SUSE LINUX Openexchange Server sends a short notification to each of the appointment participants. If this functionality should be supported by your SUSE LINUX Openexchange Server, insert the following line into the configuration file:

```
notify_participants=true
```

To prevent this notification, change the above line to:

```
notify_participants=false
```

15.2.2 Resource Administration

If defined resources are needed for an appointment, it is possible to consider them during creation of a new appointment. If your administrator has defined a single user or an user group to take care of your resource management, SUSE LINUX Openexchange Server automatically gives this resource administrator read and write permissions to this appointment whenever a resource-based appointment is created. To use this functionality, define all users and groups that should be members of your resource administration team. To define the resource team in the configuration file, use the following configuration line:

```
resource_group=resourceadmin
```

All members of user group `resourceadmin` then get read and write permissions for new resource-based appointments. The global definition of these rights for an administration group takes care of typical office structures where more than one person controls the usage of different resources. For example, if one person controls room management and another manages the use of your companies cars, each should be member of your resourceadmin group. This ensures they are allowed to edit such appointments.

If you do not want to use this groupware function, comment the described configuration line.

```
#resource_group=resourceadmin
```

15.2.3 Defining the Range

Use the range configuration line to define the appearance of the miniature calendar in the handbook frame of the web interface.

If the following configuration line exists:

```
jump_range=1
```

only one month is shown in the calendar. If you click the green arrows, the next or previous month is displayed. Instead insert configuration line:

```
jump_range=2
```

to display two months at the same time. If you click the green arrows, move two months backward or forward.

15.2.4 Configuring the Start Page

Usually, the actual day view of your calendar is opened when you access the web client's calendar module. It is also possible to start in week or month view. To start in week view, use the following configuration line:

```
calendar_start_page=week
```

To start in month view, use this configuration line:

```
calendar_start_page=month
```

15.3 Intranet Interface

Also define the start page for all other web client modules. It is very easy to change the initial appearance of the document, bookmark, and knowledge modules. To define the start page for each module, edit the configuration file `intranet.conf`.

15.3.1 Document Start Page

There are two different appearances of the document module. Usually, all documents and folders are shown in a tree view. In 'List', all documents are listed in tabular form. Each kind of appearance can be used by SUSE LINUX Openexchange Server as the default start page of the document module. To get the tree view by default, insert the following line into configuration file `intranet.conf`:

```
documents_start_page=all
```

To use the list view by default, use the following configuration line:

```
documents_start_page=list
```

15.3.2 Bookmark Start Page

As with the document module, there are two different overview appearances in the bookmark module. Bookmarks can be listed in a tree view or a tablular list view. Define your default view by editing `intranet.conf`. To use the tree view by default when opening the bookmark module, use the following configuration line:

```
bookmarks_start_page=all
```

To use the list view, substitute the above configuration line with:

```
bookmarks_start_page=list
```

15.3.3 Knowledge Start Page

As with the document module, there are two different overview appearances in the knowledge module. Knowledge entries may be listed in a tree view or tabular list view. Define your default view by editing `intranet.conf`. To use the tree view by default when opening the knowledge module, use the following configuration line:

```
knowledge_start_page=all
```

To use the list view, substitute the above configuration line with:

```
knowledge_start_page=list
```

15.3.4 Default E-Mail Encoding

Inside the groupware, SUSE LINUX Openexchange Server automatically generates and forwards a lot of notification e-mails. For example, all participants of a newly created appointment are notified. To ensure that special characters are displayed in a proper way, SUSE LINUX Openexchange Server uses UTF-8 font encoding by default when generating and forwarding such notification messages. The predefined configuration line is:

```
default_mail_encoding=UTF-8
```

If you have problems with this kind of font encoding, you may consider another form of font encoding:

```
default_mail_encoding=ISO-8859-1
default_mail_encoding=ISO-8859-15
```

Using the webmail client, your web client checks for new incoming mails in predefined periods of times. This makes it possible to provide all users with actual status of their Inbox folder. The interval for checking for new incoming mails can be configured by editing `intranet.conf`. For example:

```
mail_check_time=300
```

The inserted value has the inbox folder checked every three hundred second (five minutes) automatically. Users may be notified of new incoming mail in three different ways by the web client. If the user is browsing one of the groupware modules, the user may be informed of new incoming mail with a blinking mail icon in the module bar. Additionally, new incoming mail can be opened in a pop-up window automatically. The third way to inform users of new incoming mail is a notification sound, played every time a new mail is found in your inbox folder. Each user may define the notification type to use in his personal profile setup.

15.3.5 Handbook Frame — Sequence of Display

In the web client, an additional handbook frame is displayed on the left or right side. Use this handbook frame to access some groupware elements faster. Edit `intranet.conf` to define the sequence of links and elements that should be displayed in the handbook frame. For example, use the following configuration lines to define its appearance:

```
calendar_view=1
tasks_view=2
# linkage_view=3
search_view=4
new_item_view=5
folder_view=6
```

The values at the end of each line are the display priorities of each element. The entry with the lowest number is displayed highest in the handbook frame. This configuration example would show a small calendar on top of the handbook frame. Using the further given priorities, active jobs, a global search bar, a new objects bar, and your personal ISlox folder management are displayed in that order. If you do not want to use an element in your handbook frame, simply comment the corresponding configuration line.

15.4 Currency Format

Edit the configuration file `currencyformat.conf` to add more currencies that should be supported by the groupware. To add a new currency, add the official currency short form to your configuration file. Currencies stored in the configuration file can be used in the web client's project and job modules to define gains, costs, and expenses for each job and project.

Definition of currencies is completely free, but using official currency codes is recommended. The default configuration file includes the predefined currencies Euro, US Dollar, and British Pound:

```
# slox currency format
# "currency"
EUR
USD
GBP
```

15.5 Date Format

Edit `dateformat.conf` to select the date format to use in the web client's interface. By default, choose between German and English date format. Additionally, you may define more date format types manually.

The default date formats are:

```
DE dd.MM.yyyy HH:mm
EN MM/dd/yy h:mm a
```

Each configuration line consists of two sections. In front of the line, define the two-letter language code of the date format entry. Next to the language code, find the order of the year, month, day, hours, and minute in which dates should be entered and displayed in the groupware. Find more information about the date format used in SUSE LINUX Openexchange Server at `http://java.sun.com/j2se/1.3/docs/api/java/text/SimpleDateFormat.html`.

15.6 Configuring the Project Module

SUSE LINUX Openexchange Server can forward an automatically generated notification to all participants of a newly created project. To use this groupware functionality, it must be activated by editing the configuration file `projects.conf`.

To activate the automatic generation of such notification messages, insert the following configuration line:

```
projects_notify_participants=true
```

For users not to be informed automatically by SUSE LINUX Openexchange Server, use the following configuration line:

```
projects_notify_participants=false
```

15.7 Configuring the Job Module

SUSE LINUX Openexchange Server can forward an automatically generated notification to all participants of a newly created job. To use this groupware functionality, activate it by editing the configuration file `tasks.conf`. To activate the automatically generation of such notification messages, insert the following configuration line:

```
tasks_notify_participants=true
```

For users not to be informed automatically by SUSE LINUX Openexchange Server, use the following configuration line:

```
tasks_notify_participants=false
```

WebDAV

WebDAV (Web Distributed Authoring and Versioning) is an extension of the common HTTP protocol. One of the major disadvantages of HTTP is the conceptional limitation of web-hosted documents as read-only media. Editing documents in collaboration with other users was not covered by the standards of the basic HTTP protocol. WebDAV adds this functionality and makes it possible to use web-based structures as universal information systems. Versioning allows storing documents in web-based management structures in different versions. A permission system is also included so only allowed users can access documents. WebDAV is a functional and efficient IETF (Internet Engineering Task Force) standard, developed since 1996. In 1999, WebDAV was registered as RFC 2518. SUSE LINUX Openexchange Server 4.1 uses the WebDAV protocol as a global interface to access groupware-related information and data. WebDAV allows every user to access information without the need of a special client application. An easy file manager, like the Windows Explorer, already allows accessing the information and document structures of your groupware system. WebDAV is not only an extension of the HTTP protocol, but an alternative to the FTP protocol as well.

16.1 Accessing the Document Server Using Linux

These directions use Konqueror.

1. Start Konqueror on your Linux desktop client. See Figure 16.1.

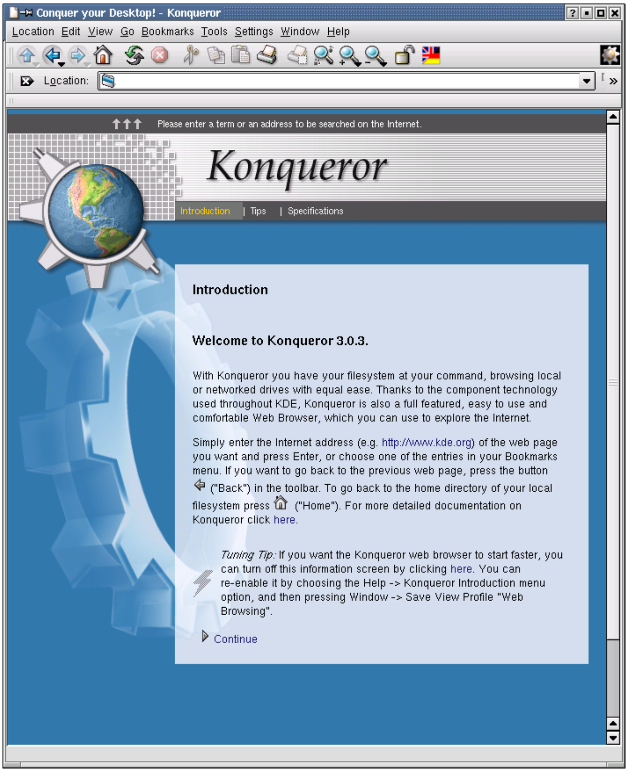


Figure 16.1: *Konqueror Web Browser*

2. Insert the address of your SUSE LINUX Openexchange Server: http://[SLOX_IP]/servlet/webdav.documents. Replace [SLOX_IP] with the IP address of your SUSE LINUX Openexchange Server. See Figure 16.2 on the facing page.

3. Insert your user name and password in the dialog. Use your usual account information to log in.

Figure 16.2: *Insert SUSE LINUX Openexchange Server Account Information*

4. If login was successful, browse the content of your document server with Konqueror as shown in Figure 16.3 on the next page.

16.2 Accessing the Document Server Using Windows2000

The following directions apply to Windows 2000 environments.

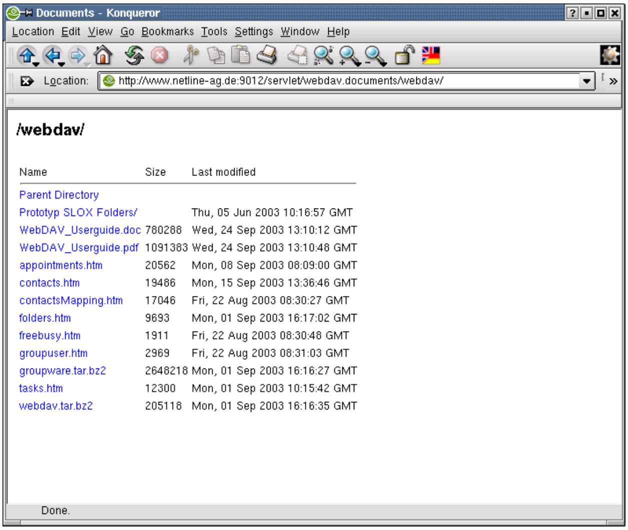


Figure 16.3: *The Document Server in Konqueror*

1. Open the network environment in your windows 2000 operating system as shown in Figure 16.4 on the facing page.

2. Click the network resources icon. Refer to Figure 16.5 on page 188.

3. Insert the network path to your SUSE LINUX Openexchange Server. Use the syntax `http://[IP]/servlet/webdav.documents`. Replace [IP] with the IP address of your SUSE LINUX Openexchange Server. See Figure 16.6 on page 188.

4. Insert your user name and password. Use your usual account information for the web interface. Refer to Figure 16.7 on page 189.

5. If login was successful, name your resource. See Figure 16.8 on page 189.

6. Installation of the document module is now finished. Access the new network resource in Windows using your network environment. The directory structure is identical to that of the document module of the SUSE LINUX Openexchange Server web interface. See Figure 16.9 on page 190.

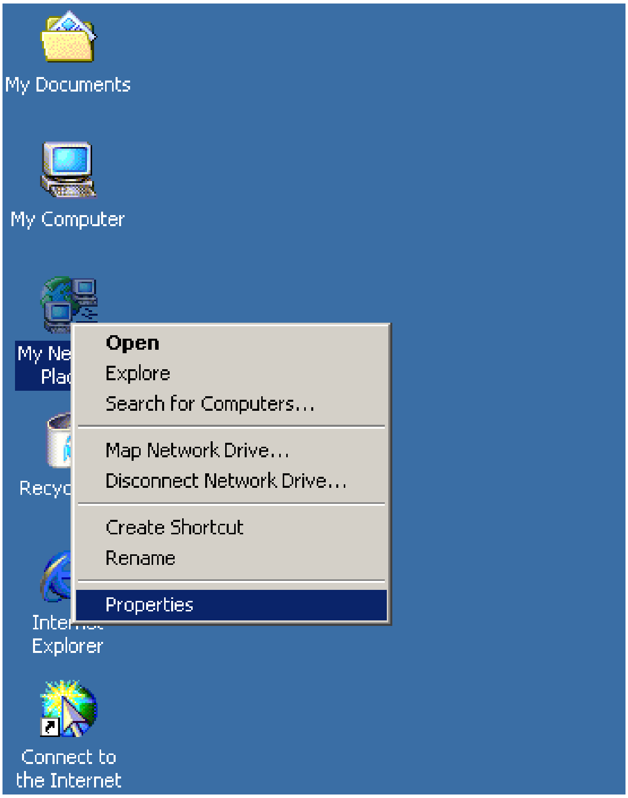


Figure 16.4: *Windows Network Environment*

7. Additionally, you may access the document module of SUSE LINUX Openexchange Server in Windows with your favorite web browser. Insert the URL `http://[IP]/servlet/webdav.documents/` in the address field of your web browser, replacing [IP] with the IP address of your SUSE LINUX Openexchange Server. Refer to Figure 16.10 on page 190.

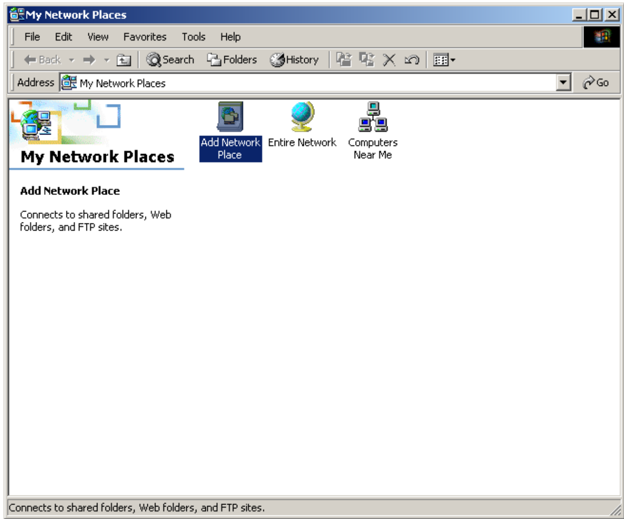


Figure 16.5: Adding a Network Resource

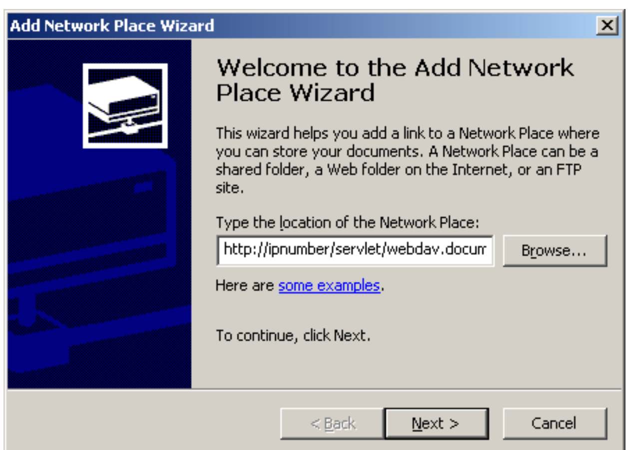


Figure 16.6: Adding the Network Path to Your SUSE LINUX Openexchange Server

Figure 16.7: Log in to SUSE LINUX Openexchange Server

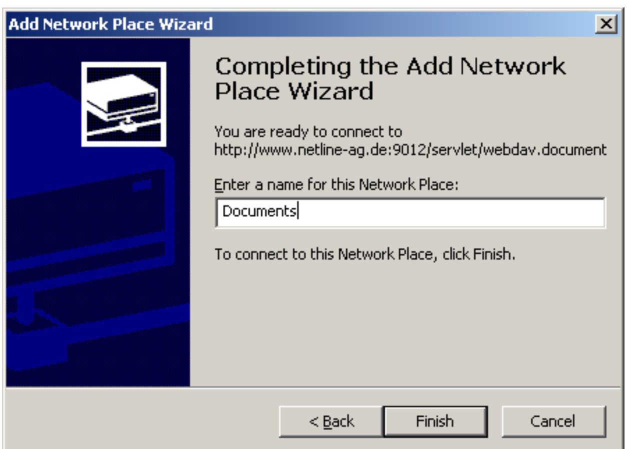


Figure 16.8: Adding a Name

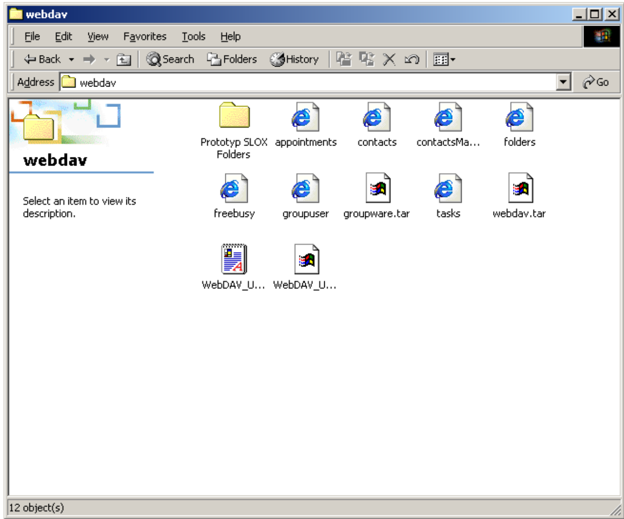


Figure 16.9: *Overview of SUSE LINUX Openexchange Server Document Shares in Windows2000*

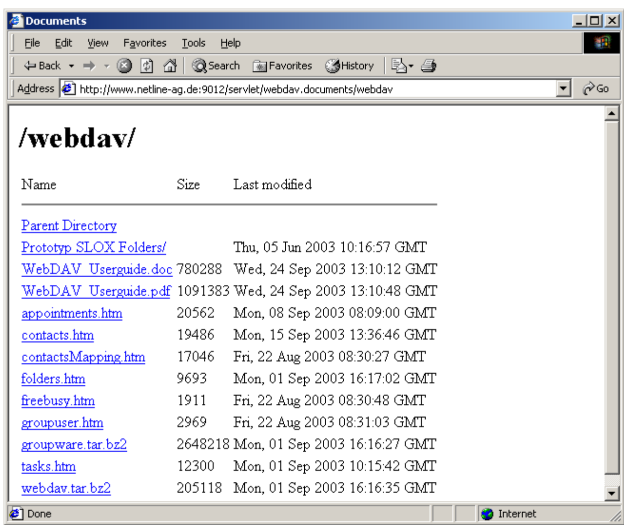


Figure 16.10: *The Document Server in Windows in a Web Browser*

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