

Getting Started Guide

23rd January 2007

Introduction

This is a guide to getting started with your account on your company's AZ1000 collaboration server. By the end of this guide you will be able to log in to your account through a Microsoft Windows PC, send and receive email, create; contacts, appointments, notes, tasks and bookmarks, connect to the instant messaging server and access your files through a web interface.

This guide is intended to allow you to make use of the services available prior to receiving full training. To ensure your experience of the AZ1000 is as productive and pleasurable we strongly suggest following all the steps in this guide, ideally setting aside an hour to dedicate to the experience.

Chapter 1

Microsoft Windows log-in

These instructions are based on Microsoft Windows XP, other versions should be largely similar, however if you find you cannot follow these instructions then please contact whoever supports your Microsoft Windows computers - if they believe there is a problem with the server then they should contact whoever is responsible for supporting the server.

To start with you will log on to the computer, this will retrieve your settings from the server and connect you to your 'home' drive on the server, this means that your settings and files will be available whichever computer in your 'domain' that you are logged in to.

1.1 Logging in

To log in enter your user name and password, then select the name of your domain from the 'Log on to' drop-down box (figure 1.1).

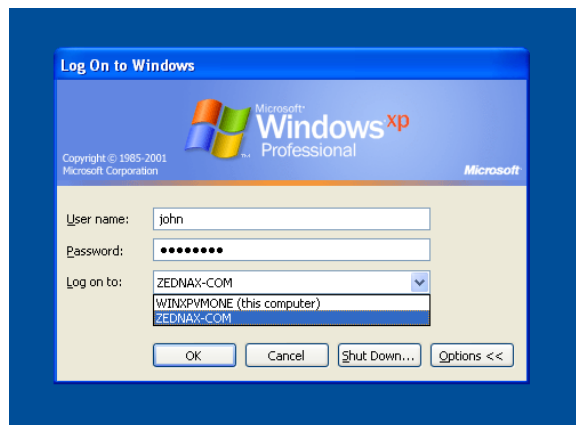


Figure 1.1: Logging on to a Microsoft Windows PC

You will now see some messages telling you that your settings are being retrieved. Shortly you should be fully logged in (figure 1.2).

1.2 Where to store files

Clicking on 'My Computer' from the start menu or the desktop will show you the contents of the 'My Computer' folder in addition to the normal contents you should see a 'Z Drive' this is your 'home' drive and will be available via the web interface (and through the unix 'shell' and secure ftp if you use them).

Additionally there is a shared area where you can place files for colleagues to access and they can place files for you to access, administrator users will be able to set-up groups and should advise on creating a structure of folders that keeps the shared area tidy. The shared area can be accessed by going to 'Entire Network', then 'Microsoft Windows Network', then select your domain, then connect to the 'Samba Server' (if there are more than one the contact your system administrator for guidance). The contents of this server will vary, but should include a network folder with your name (this is your 'home' folder) and a folder called 'public' - this is the shared area. It is recommended that you map this as a network drive, you can do this by right clicking the folder and selecting 'Map Network Drive'. A prompt should appear allowing you to select a drive letter, you should not need to change this, however if you do then bear in mind that some computers you log in to may have more drives than the one you are on, therefore pick a high

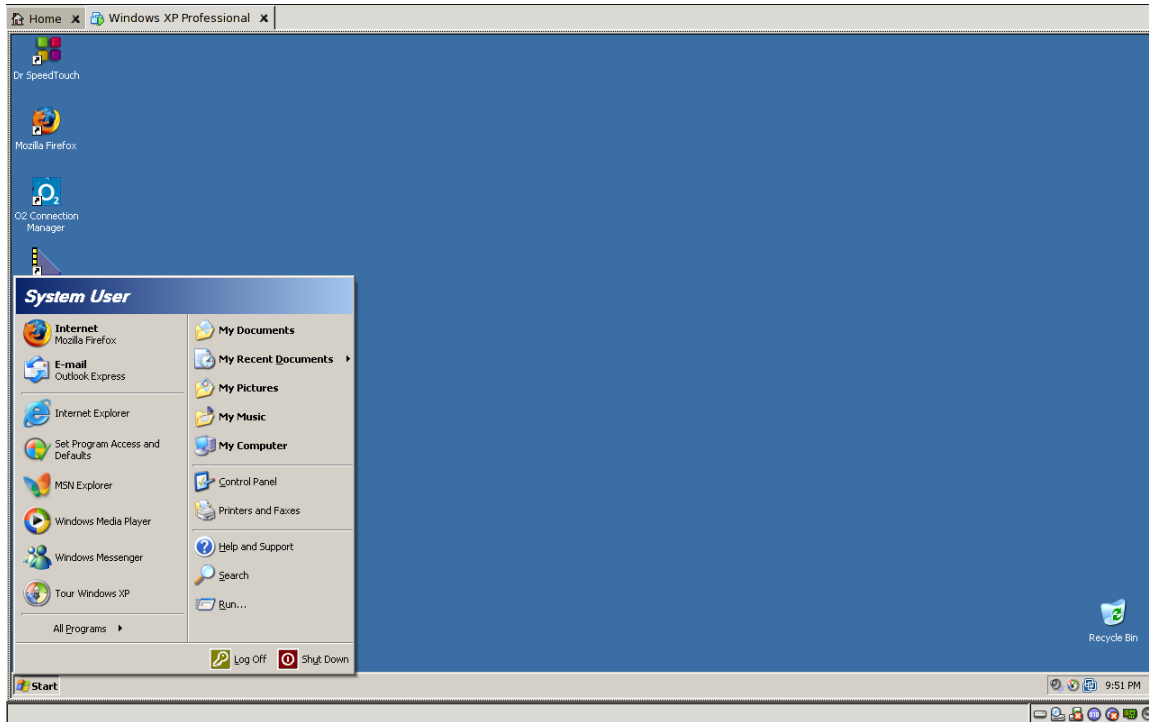


Figure 1.2: Logged-in screen

letter (G or above). Finally click finish, now each time you log-on you will be able to access the shared area through 'My Computer'. The process can be seen in figures 1.3 to 1.9.

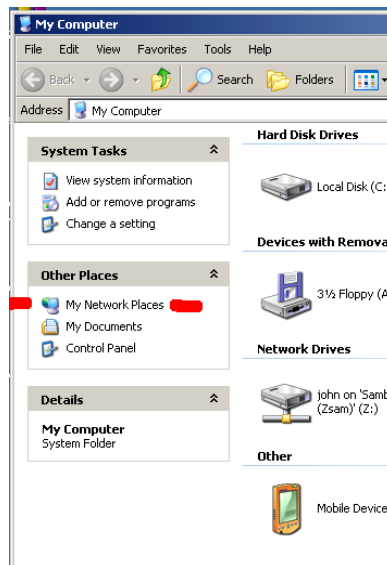


Figure 1.3: My Computer

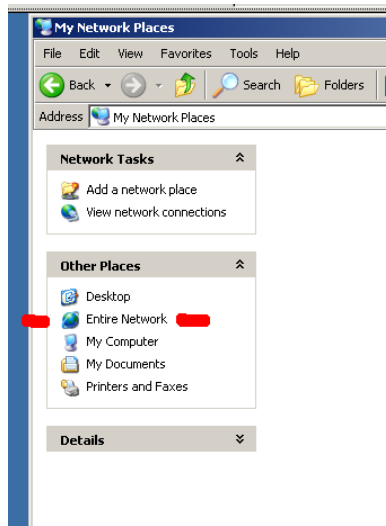


Figure 1.4: My Network Places

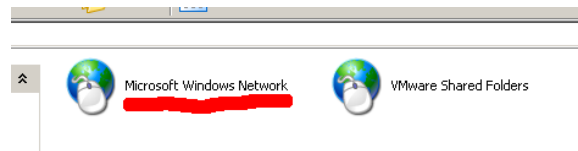


Figure 1.5: Entire Network

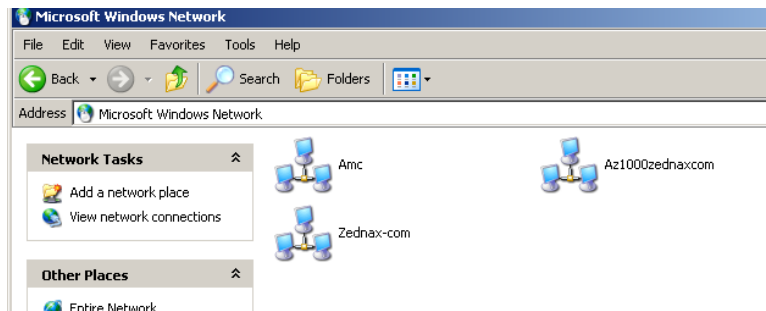


Figure 1.6: Microsoft Windows Network

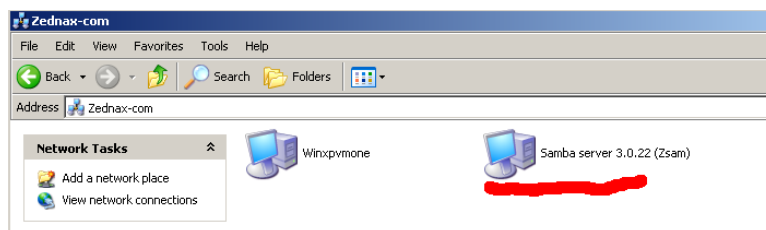


Figure 1.7: Your Domain

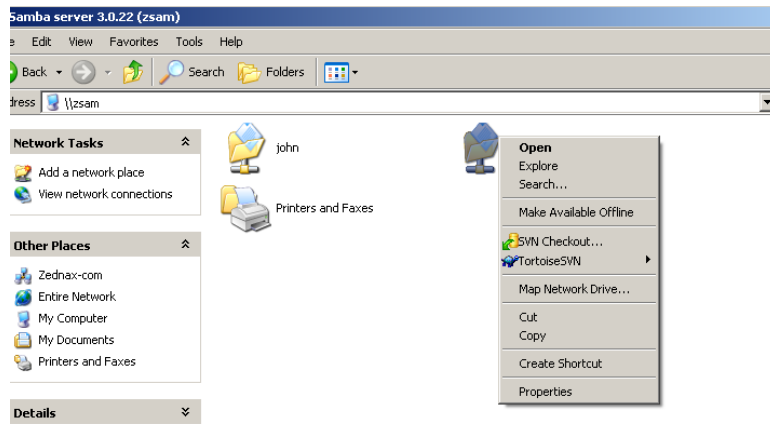


Figure 1.8: Map Network Drive

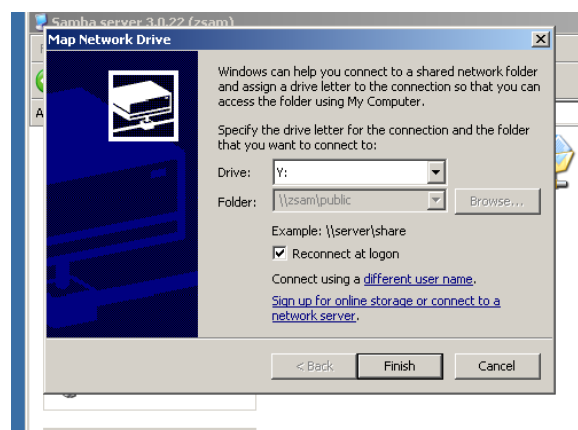


Figure 1.9: Select Drive Letter

Chapter 2

Groupware/Collaboration suite

Most of the aspects of the collaboration suite (email, address book, tasks, calendar and notes) can be accessed through an offline client, such as Mozilla Thunderbird/Sunbird or Microsoft Outlook. However, there are certain limitations when using an offline client, like not being able to see shared calendars, notes, tasks etc. We would recommend that you try accessing the collaboration suite through the web (Horde) interface. Additional documentation and information on Horde can be found at <https://seth.zednax.com/drupal/az1000> or at <http://www.horde.org>.

To log in to horde go to <https://<your server address>/horde/> and enter your username and password - at this point you can also select which language you wish the interace to be presented in at this point. This screen can be seen in figure 2.1.

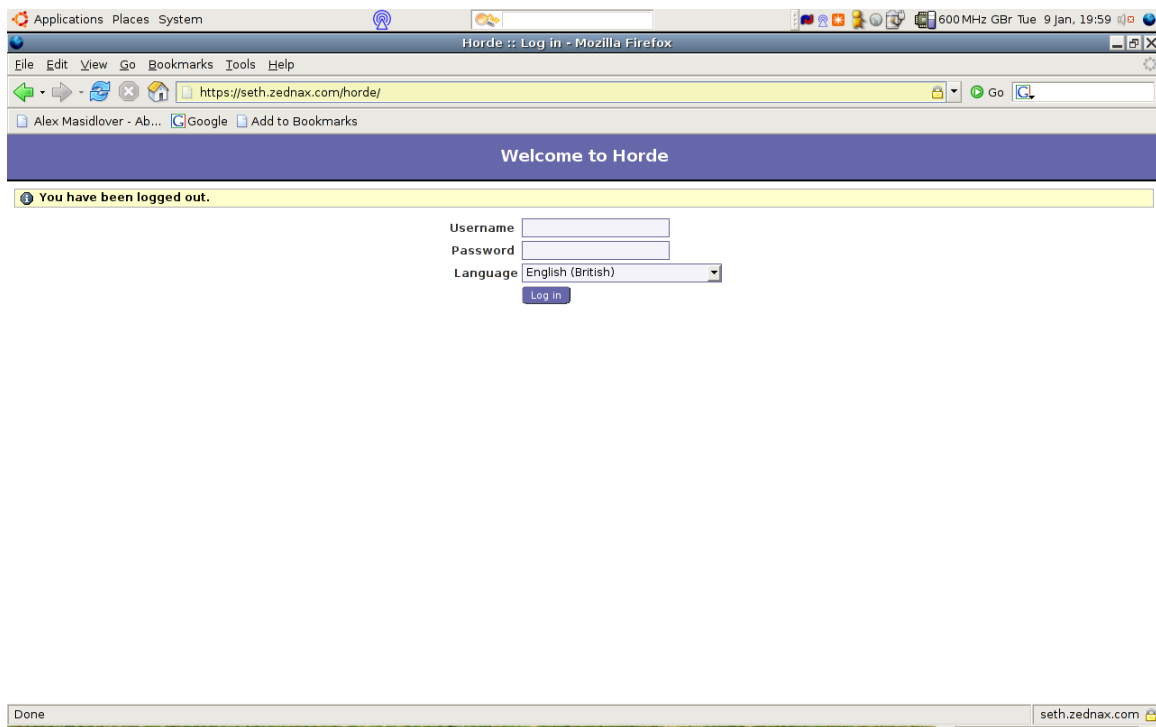


Figure 2.1: Horde Log-in Screen

2.1 The basics

Once you have logged in you will see a screen much like the one in figure 2.2. At the top of the screen is the menu (Home, Options, Problem etc.) for the current application. The left hand side of the screen is called the side bar and gives access to all of the Horde Applications. To access an application then click on its name or icon. To expand a group of applications or functions/folders within an application then click the plus sign next to the name of the application, group or folder. For the rest of this documentation items within the 'tree' in the sidebar will be referred to in the following way 'Organizing -> Address Book -> New Contact', this would be accessed by clicking the + next to Organizing, then the + next to Address book, then click either the icon by 'New Contact' or the words 'New Contact'.

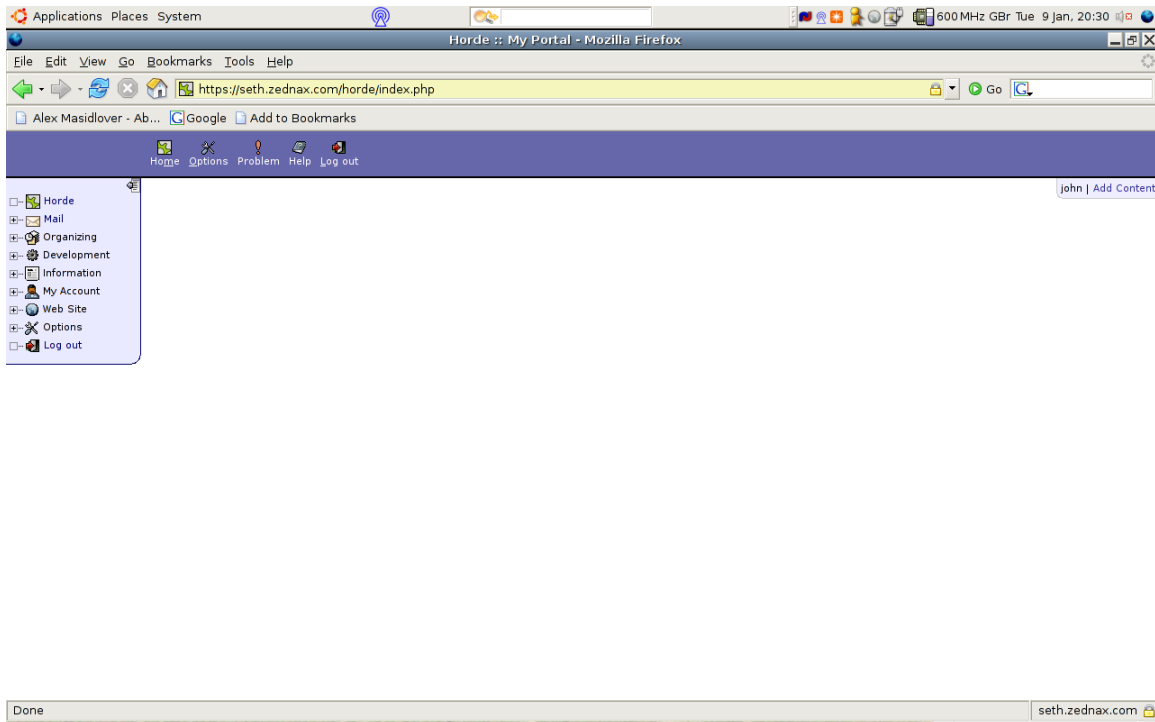


Figure 2.2: Horde main screen

2.2 Entering your information

Your system administrator should have created your account with your log-in name and your email address and any aliases, you now need to enter the rest of your details so that your colleagues can find you in the directory and so that you can send your 'vCard' (an electronic business card) if you wish.

You can access your contact detail by going to 'Organizing -> Address Book -> Company Directory', then pick your entry from the list in the main area (click on the edit icon next to your name which looks like a notepad and pen). You will see a screen like the one in figure 2.3, you can fill in as much or as little information as you wish, providing you fill the items marked with a red asterisk and do not change the email address or aliases.

You should also set-up your email signature by going to 'Options -> Email' and then selecting 'Personal Information' under 'General Options'. Fill in your name, email address and signature (right at the bottom), then click save - you can safely ignore an error about an illegal value. If you have more than one email address that you need to send from then you can set it up from here - see the full user guide for this.

2.3 Creating contacts

There are a number of ways to get to any point in the Horde system, to create a contact one of the ways is to go to 'Organizing -> Address Book -> New Contact'. You will first be asked which address book to use, you can select either the Shared Address Book or 'My Address Book', you can not create entries in the Company Directory (the system administrators can do this through the 'Administration -> Users' interface). Once you have made your selection the screen will reload and provide a screen almost identical to the one in figure 2.3, this time you can enter email addresses as well (comma separated if there are multiple addresses).

2.4 Finding contacts

You can select an address book by going to its entry under 'Organizing -> Address Book' and clicking on its name. If there are less than the number of entries in your address book than you have set to show per page in the options then all the entries will show, otherwise you will be able to select the entries by the first letter of their last name by selecting from the alphabet below the menu. Alternatively you can click on the search item in the menu.

2.5 Contact lists

To create a contact (or distribution) list you have a separate area called 'My Contact List'. To create contact lists, find the contact(s) you wish to add to the list and then select the list (or create a new list from the) 'Add to contact

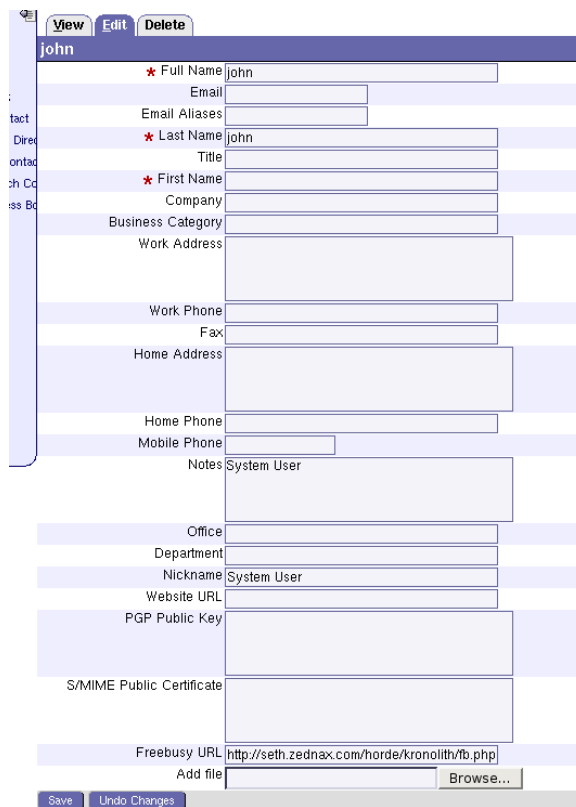


Figure 2.3: Entering your details

list' drop down box in figure 2.4. You can use advanced search to search for contacts, for example where you want to find everyone from the same company.

You need to bear in mind that although you can share your contact lists by going to 'My Contacts' in the menu bar, selecting the 'My Contact List' and then editing the permissions, other users will only see contacts in the contact lists if they can access the list the contact is shared in - usually this will only be 'Shared Contacts' or 'Company Directory'.

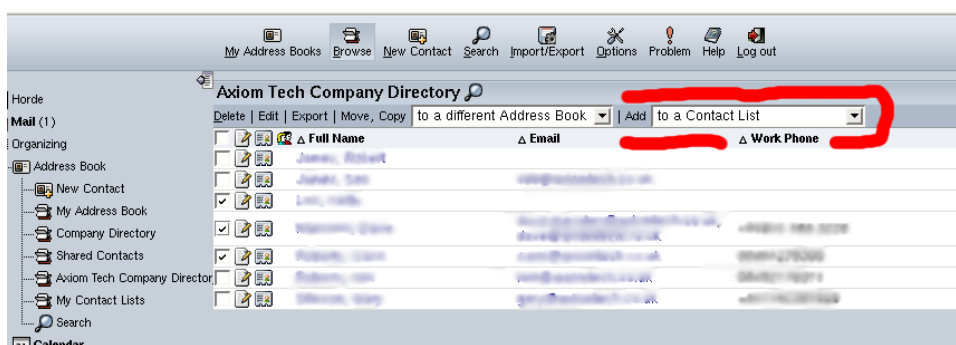


Figure 2.4: Adding to contact lists

When sending mail to a contact list you will need to use the 'Address Book' button in the compose mail window, select the 'My Contact Lists' address book and then click search, select the list you wish to use and then press the 'BCC: ->' button (you can use To or CC if desired).

2.6 Reading email

Reading new email is done by clicking on 'Mail' in the sidebar, this will show you the content of your inbox. See figure 2.5.

You can read an email by clicking on its subject or sender, below the menu bar will be a variety of reply and forwarding options, clicking them will open the compose email dialogue described in the next section.

From the list of emails you can delete, forward, move, copy etc. by checking the box next to the message, and then selecting the action (and folder if appropriate) from the bar below the application menu.

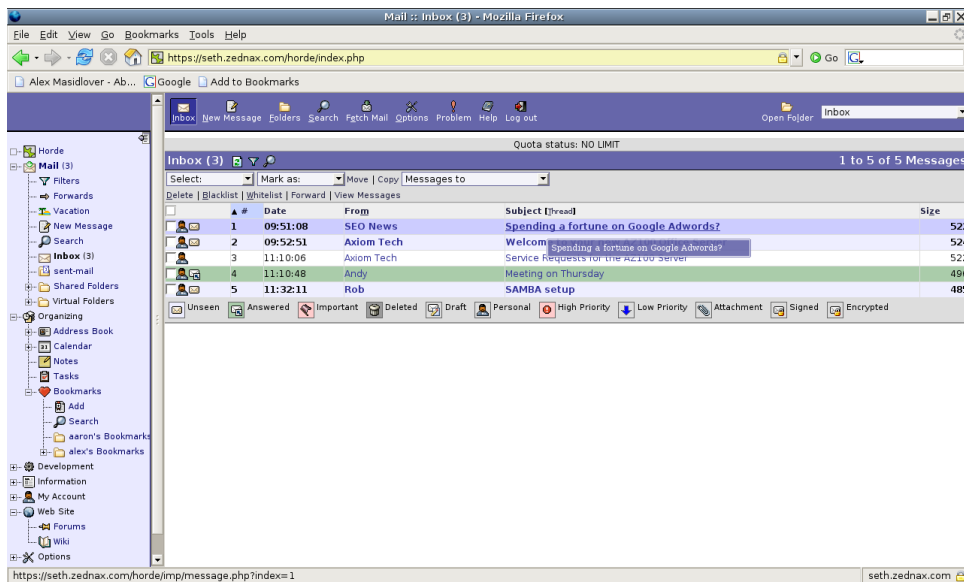


Figure 2.5: Inbox

2.7 Sending email

You can send a message by either going to 'Mail -> New Message' or by clicking the 'New Message' icon in the menu bar of the Mail application, a new window will open for you to compose the email in (figure).

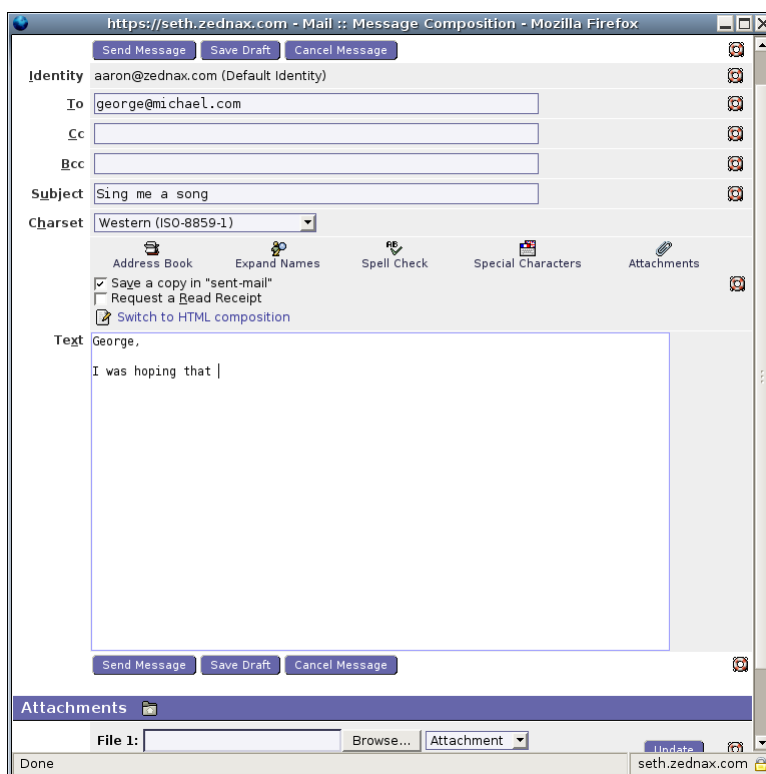


Figure 2.6: New Message

Enter the email addresses (or names), separated by commas, of your intended recipients in the to, cc and/or bcc fields, as soon as you leave these fields by pressing tab or clicking in another field with the mouse, then Horde will attempt to convert any names you have entered into email addresses - if it finds multiple entries for a name it will tell you and you will need to click 'Expand Names' to select the correct address(es). Next enter a subject and the body of the message (you can add formatting etc. by clicking 'Switch to HTML composition'). You can add attachments at the bottom of the screen. Finally, click 'Send Message' to send the message.

2.8 Organising email

You can create new folders once in the Mail application, by selecting 'Folders' from the menu bar. You will be shown the list of existing folders, you can then perform various actions by selecting from the 'Choose action:' drop down box below the menu bar - when creating folders, if you have selected a folder the new folder will be a sub-folder of the selected folder, otherwise it will be a top-level folder. You can then use the newly created folders to organise your email.

2.9 Appointments, tasks, notes and bookmarks

Once you have got the hang of email, the interface for the 'Organizing' applications should hold few (if any surprises) for you - these applications are unaltered from the standard Horde versions. These applications are well documented in the user guide. The only thing worthy of noting here is that adding bookmarks can be done by dragging the link at the bottom of the 'Add Bookmarks' page on to your browser's bookmarks tool bar - once you have done this you can click on this link from any page you wish to bookmark.

2.10 Accessing your files

You can access your files by going to 'My Account -> File Manager -> Home Directories' or to the shared area by going to 'My Account -> File Manager -> Public'. You can then browse your files/folders in the typical Horde manner.

2.11 Sharing information

The power of the AZ1000 collaboration server is that not only can you use the system to store your own information you can choose to give access to parts of your information to other selected users. The computing term for allowing this access is 'Access Control Lists' (ACLs), in simple terms you can give access to other users or groups (or 'anyone') to your folders and to (in some cases) individual items.

For access to files this can be done through the 'properties' option seen when right clicking on the folder or file - please refer to Microsoft Documentation or you IT support provider for guidance on this.

For setting access to items and folders within 'Mail' or 'Organizing' the method of accessing the permissions setting varies, but the permissions dialogue itself does not.

For 'Mail' go to 'Options -> Mail' then click on 'Share Folders' under the 'General Options' section.

Address Books can only be shared by the system maintainers at this point.

For calendar, go to 'Organizing -> Calendar' then click on 'v Show Options' on the right of the main area, this will show a list of Calendars, below your calendars you can select 'Manage My Calendars', the main page will then show the default calendar and will show a drop-down from which you can choose others. When you have selected the calendar to share you can click the 'Permissions' button.

For Notepads go to 'Organizing -> Notes', then select 'My Notepads' from the menu bar. Selecting the notepad from the drop-down list will show a 'Permissions' button.

For Tasklists the process is the same as Notepads.

For Bookmarks, select the item or folder which you wish to set the permissions of and then select 'Set Permissions' from the 'Choose Action:' drop down on the far right below the menu bar.

Once you are in the permissions dialogue you will see something similar to what is shown in figure 2.7.

The Show (or list in mail) permission will allow the person granted the permission to see the list of items in a folder but not read them, read, edit and delete will operate as you would expect. The 'default' permission is for the owner to have all rights and everyone else to have none. The object creator permissions is for where you have allowed other users to create items in your folder - they are the object creator. The 'All authenticated users' permission applies to anyone with a valid log in. Guest permissions will allow you to point non-users to the item by its URL and they can then see it - use of this is not advised. Individual Users and Groups allows you to select particular users or groups to give them access, once you have selected one to add and clicked save you will be offered to add another - you can remove a user/group permission by unchecking all of their permissions.

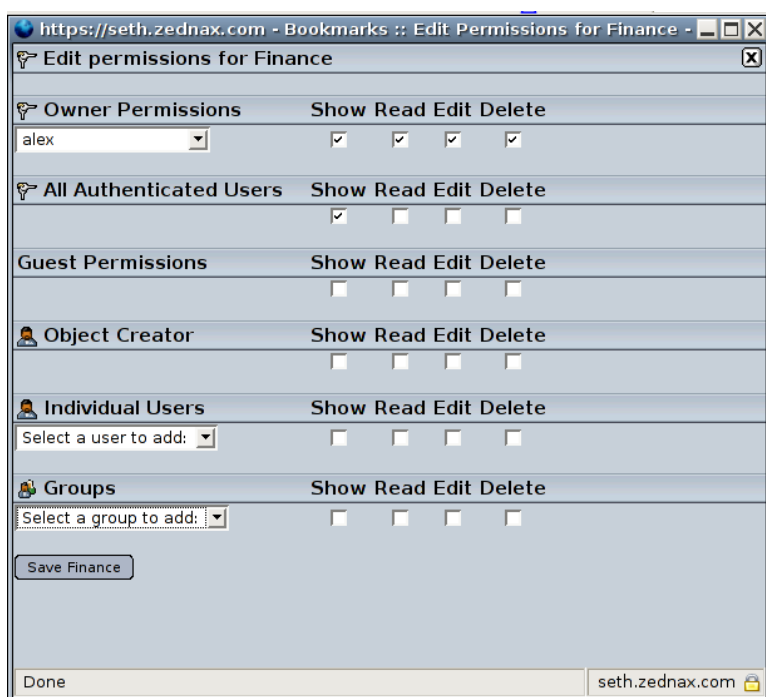


Figure 2.7: Horde permissions dialogue