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Revised 8/21/2008
Welcome to Zimbra!

CITS has selected Zimbra Collaboration Suite to provide an integrated Calendaring, E-mail and Address Book solution to the UMass Dartmouth community. This manual explores the Calendar features of Zimbra. Other manuals are available (or will be soon) for other aspects of Zimbra. If you have any questions about using Zimbra, please contact the I.T. Service Center at 508-999-8790 or E-mail ITSCenter@umassd.edu.

Note that Zimbra requires a recent computer operating system and web browser with full Java support to run the full (AJAX) version with all features. CITS recommends Firefox 2.0.0.16 or newer. A basic (HTML) version is available for computers with older operating systems and browsers. This manual covers only the AJAX version of Zimbra.

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Appendix: Preferences
**General Introduction**

Zimbra calendar is a full-featured group-scheduling software package. It offers full access via the Internet, calendar sharing, and integration with desktop calendars such as Microsoft Outlook and Apple’s iCal. PDA and Smartphone synchronization is also available with most Palm devices and the iPhone. Please contact the Service Center at x8790 for more information.

### 1.a Logging into Zimbra

To log into Zimbra, open a web browser on your computer and visit [http://zimbra.umassd.edu](http://zimbra.umassd.edu). The Zimbra login screen is displayed, as shown below.

Enter your UMD Logon username and password into the fields provided. These are the same as your E-mail username and password.

If you cannot remember your E-mail password, you can reset it here: [https://e-mail.umassd.edu/password/](https://e-mail.umassd.edu/password/). If you have trouble with the reset process, the Access Management team of CITS is available to help with password issues. They can be contacted at 508-999-8532, 508-999-8793, or 508-999-8528.

The Version pop-up menu is set to Default, which selects the best version of Zimbra your computer and web browser can use. If you find your access is slow, you may try using the HTML version.

Click **Log In** to proceed.

When you log in successfully, the Zimbra Collaboration Suite is displayed in your browser window. The different applications (Mail, Address Book, Calendar, Tasks, and Briefcase) are selected using the series of light-blue tabs across the top of the screen, just below the search buttons.
1. The Zimbra Screen

The Zimbra Calendar screen is shown below.

The screen is divided into two Panes. The right pane contains the main calendar area. The left pane contains different sections divided by light-blue bars. They are Calendars, Tags, Zimlets, and the Calendar Navigator. Click the gray triangle to the left of a section name to hide or display the section contents.

The **Calendars** section is used to create, rename and delete calendars, and to turn the display of calendar items on and off. Calendars are discussed on page 19.

The **Tags** section is used to create colored tags that can be applied to calendar items. They can also be applied to E-mail messages. Tags are discussed further on page 10.

The **Zimlets** section is used to enable and disable software add-ons that increase the functionality of Zimbra. There are no Zimlets installed at this time.

The **Calendar Navigator** is used to display different date ranges in the calendar area. Today is indicated by a red rectangle around a date. Days with appointments are indicated by bold type. The dates displayed in the main calendar pane are indicated in light blue in the navigator. Click a date to display it in the main calendar pane. Click the single arrows on either side of the month to move forward or backward on month. Click the double arrows to move ahead and back one year.

The arrows in the upper-right corner of the calendar pane can also be used to navigate forward and back one week at a time.
1.c The Calendar Pane

The Calendar pane is shown below.

A toolbar of buttons appears across the top, beneath the Calendar tab. A horizontal light-blue bar divides the banner area from the main calendar area. Click the bar to hide or display the Banner area.

Days are shown as a series of 5 columns, with the weekday and date displayed at the top. Today, if visible, is labeled in red type. Note that this is the default Work Week view of the calendar, which displays Monday through Friday. Other calendar views are discussed on pages 4 and 5. The time of day is shown on the left side, from top to bottom. Use the scroll bar on the right to see times earlier or later in the day.

Calendar Events and Banners are indicated by shaded rectangles. The start time of each event is shown in a darker strip at the top of the event. Events are color coded by their associated calendar. (See page 22 to change calendar colors.) Click an event to select it.

A selected event is indicated by a thicker border and bold type, as shown here. Drag to move the event to a different time or day. Press <backspace> or <delete> to remove the event.

Point to an event, and leave your mouse cursor still for a moment to see the details of the event. An example is shown to the left.
1.d Other Calendar Views

The Calendar can be presented in five different ways. Thus far, we have looked at the Work Week view. This display is controlled using the view buttons on the toolbar. These are shown here.

The button for the currently selected view is grayed out. Click a button to select the desired view.

The Day view is shown below.

Day view displays only one day at a time. This makes it easy to read the complete text of event titles, as well as event start and end times.

The Week view is shown below.

Week view displays a full week, including Saturday and Sunday.
The **Month** view is shown below.

Month view displays an entire month, including weekends. Event start times are shown, and as much of each event title as fits on one line.

All events on each day are listed in this view, which may make some weeks taller than others. Use the scroll bar on the right to see any hidden weeks.

The **Schedule** view is shown below.

This view shows one day, with different calendars separated into columns. In the example above, The *Calendar* calendar data is shown in the left column, and the *Personal* calendar data is shown on the right. A thin *All* column on the left side uses pink bars to illustrate the occupied time from the combined calendars.
2.a Creating Appointments

Events reserve time in your calendar, and provide reminders for important activities. Events include Appointments, which reserve time in your calendar only, Banners which provide reminders without a specific time associated with them, and Meetings which involve other Zimbra users. All three event types are discussed in this section.

To reserve time in your calendar, point to the desired day in the calendar, and drag from the start time to the end time. The QuickAdd Appointment dialog box opens, as shown below.

Enter a title for the event in the Subject field.

Enter a Location into the field provided if desired. Note that this is optional.

The Show As pop-up menu indicates how this time is perceived by others who may invite you to a meeting. This menu is shown to the right. When Free is selected, you are shown as available when a meeting invitation is sent. This is discussed further in the Meeting section on page 13.

The Mark As pop-up menu determines what can be seen by others who have access to your calendar. Appointments marked Public can be examined by others with whom you have shared your calendar. Appointments marked Private are readable only by you; others see ‘private appointment’ instead of the event subject and other details.

Use the Calendar pop-up to associate the appointment with a particular calendar. The Calendar calendar is used by default.

Events can be scheduled in 5 minute increments, and they are displayed accordingly in the calendar. When dragging to create an appointment, times are rounded to the nearest 30 minutes. Use the pop-up menus as needed to adjust the Start Time and End Time.
The **Repeat** pop-up menu is used to set up events that occur more than once. This is explained on pages 8 and 9.

The Reminder pop-up sets the reminder for the appointment. Reminders are explained on Page 12.

Click **OK** to create the appointment, or **Cancel** to discard it.

Once an appointment is created, it can be moved, altered or deleted. To make changes to an existing appointment, first click to select it. A selected appointment is shown to the right.

Drag to move the appointment to a new time and/or day. Press the `<BACKSPACE>` or `<DELETE>` key to remove the appointment from your calendar.

To make changes to an appointment, double click it. The **Appointment Details** screen is displayed, as shown below.

![Appointment Details Screen](image)

The controls are the same as the QuickAdd dialog box, with the addition of Tabs for Schedule, Attendees, Locations, and Resources. These are discussed in the Meeting section on page 13.

There is also a large text field at the bottom of the screen for adding an agenda or other notes. Styled text is supported, and controls are available above the field for most paragraph and character formats.

Click **Save** to save any changes and return to the calendar view. Click **Cancel** or **Close** to discard any changes.
2.b Event Repetitions

Events often occur more than once, such as weekly staff meetings, daily lunch breaks, or classes that occurs on Tuesdays and Thursdays throughout a semester. Zimbra provides tools for creating one event that occurs many times. This simplifies the process of adding these repeating events to your calendar.

To set the event frequency, open the QuickAdd Appointment dialog box or the Appointment Details screen. Click the Repeat pop-up menu, shown to the right, and make your selection. Each choice reveals the Custom Repeat dialog box with different options available. These are described in this section.

The Custom Repeat dialog box is shown below with Daily selected.

Use this option to schedule events that repeat every day, or fixed number of days. The event can have no end date, end after a selected number of occurrences, or end on a particular date. Select the radio buttons that meet your needs.

The Custom Repeat dialog box is shown below with Weekly selected.

This option is used for events that occur every week (or fixed number of weeks) on a certain day or days. This works perfectly for entering class schedule events into Zimbra.
Zimbra Calendar

Calendar Events

The Custom Repeat dialog box is shown below with **Monthly** selected.

Use this option to schedule events that occur on a particular day of every month, or on a selected weekday of every month. Events scheduled for a specific date are not moved when they fall on a weekend.

The Custom Repeat dialog box is shown below with **Yearly** selected.

Use this option for events that occur once a year.

Click **OK** to apply any changes, or **Cancel** to discard them.

When changes are made to a repeating event, the user must decide if they want to change just the selected occurrence of the event, or all occurrences.

Select the desired option, then click **OK** to make changes, or **Cancel**.
2.c Tags

Tags are used to apply a colored tag and a text label to different types of Appointments and Meetings. Tags are also used to filter the display of the calendar, so that only events with a particular tag are shown. An event with a yellow Tag is shown to the right.

Your calendar may not have any Tags associated with it to start. To create a new Tag, right-click or <CONTROL>-click on the Tags bar in the left pane. A pop-up menu is displayed, as shown here. Select New Tag. The **Create New Tag** dialog box is displayed, as shown below.

![Create New Tag Dialog](image)

Enter a name for the Tag in the field provided, and select a color from the pop-up menu on the right.

Click **OK** to create the tag, or **Cancel**.

To apply a Tag to an event, click to select it, then right-click or <CONTROL>-click on it. A pop-up menu is displayed, as shown here. Click to select the **Tag Appointment** submenu, then select the desired tag. Note that more than one tag can be applied to an Event.

![Tag Appointment Submenu](image)

To alter an existing Tag, right-click or <CONTROL>-click the desired tag in the left pane. A pop-up menu is displayed, as shown here. Choose **Rename Tag** to change the Tag label. Choose a different **Tag Color** from the submenu if desired. All Events with that tag applied reflect any changes immediately.

![Rename Tag Submenu](image)

To filter the calendar contents, click a Tag name in the left pane. Only Events with the selected tag applied are displayed. To show all calendar events again, click the **Refresh** button in the toolbar at the top of the screen.
2.d Banners

Banners are similar to Appointments, but do not have a time associated with them. They are useful for creating reminders for campus events, such as Discovery Days. To create a banner, drag in the banner area in the Calendar pane, as shown here.

The QuickAdd Appointment dialog box is displayed, as shown below.

![QuickAdd Appointment dialog box](image)

Note that this is very similar to the dialog box used to create Appointments. It lacks controls for the event time, as banners do not use that information.

A **Subject** is required, and other fields are optional. Click **More Details...** to add additional information and invite guests. See page 6 for a detailed description of the other controls.

Click **OK** to create the Banner, or **Cancel** to discard it.
2.e Reminders

Reminders are dialog boxes that open to remind you of an upcoming event. An example is show below.

The Subject of the Appointment is shown, along with the start time and duration.

Like an alarm clock, a Reminder can be set to Snooze. This closes the dialog box, and reopens it in a fixed amount of time. The snooze time is set with a pop-up menu shown here. Click Snooze to set the snooze alarm.

Click Dismiss All to close the dialog box and suspend future reminders for the appointments displayed.

2.f Searching

You can search your calendar for events that have particular text in the Subject. Searches are performed with the buttons above the Applications tabs. These buttons are shown below.

Type the desired text into the field provided. Select the area you would like to search using the pop-up menu shown to the right. The same search controls are used for searching E-mail, Contacts, Appointments and other areas of Zimbra. Click the Search button to perform the search.

Searching the Zimbra calendar behaves differently than you might expect. Events that match your criteria are displayed, and all others are hidden. An example of a search for ‘team’ is shown below.
3.a Inviting Others to Meetings

One of the most powerful aspects of the Zimbra Coloration Suite is the ability to plan meetings and coordinate the schedules of many people. As a Zimbra user, you can invite anyone with E-mail access to a meeting. To do this, create an Appointment, and click the More Details… button. Then click the Find Attendees Tab, as shown below.

The top section of the screen is used to find the person you wish to invite. By default, the Global Addresses list is selected, which shows all campus users with access to the Zimbra Suite. 25 entries are displayed at a time in the list box. Use the scroll bar to see hidden entries. Use the scroll buttons to see the next 25 users in the list.

This can be time-consuming to search through. It may be easier to use your Contacts list as a starting point. To do this, select your Contacts from the Source pop-up menu, shown here.

You can also enter text into the Find field, and click the Search button to display matching entries. An example is shown below.

When you find the person you are looking for, click to select them, then click Add. Repeat this process until all the desired attendees have been added.
As potential attendees are added to the list, they are displayed in the bottom section of the screen. An example is shown below.

The Status column at the right side of the list shows the Attendee’s availability. This information is accurate only for campus users. Also note that Zimbra does not distinguish between working and non-working hours, so please be considerate of the people you are inviting.

When you have finished adding guests to the meeting, click the Schedule tab. An example is shown below.

The Schedule tab displays a compact group calendar for all invitees. A combined availability row is shown at the top of the calendar area. Appointment details are omitted, but busy and free times are clearly marked. A Key is displayed in the upper right to explain the meaning of the different shaded areas.

Controls appear on the upper-left side to change the meeting day, time, and duration if needed.

To the right of each invitees’ name is a box indicating their response to the meeting invitation. Return to this area to check the response status.

- Yes.
- Maybe, or no response yet.
- No.
When the meeting guest list and schedule are complete, click the Appointment Details tab to make any other additions or changes. An example is shown below.

Guests are listed in the Attendees field.

Click the Add Attachment button to attach any desired external documents.

Click Spell Check to proof the spelling of the agenda.

Click Save to create the meeting and send the invitation. Click Cancel to discard the meeting and any changes.

It is important to know that Zimbra meeting invitations and responses are sent and received via E-mail. Zimbra uses industry standard calendaring protocols. As such, software such as Outlook and iCal can work seamlessly with invitations sent from Zimbra. That is what makes it possible to invite people to meetings who are not using the UMass Dartmouth Zimbra server.

It is also important to understand that a separate E-mail message is sent every time a change is made to a meeting. It doesn’t matter what kind of change it is, or how small it may seem. For every change, all the guests must respond whether they are able or unable to attend. This makes it imperative to include as much information as possible at the beginning, and make sure it is accurate before sending the first invitation.

Last, there are Tabs on the details screen for Locations and Resources. For now, these tabs do not provide any functionality.
3.6 Responding to Meeting Invitations

Meeting invitations are sent and received via E-mail. These messages have a special icon in your Zimbra mailbox. An example received invitation is shown below.

Open the message to reveal special controls for responding. The message above is shown opened here.

Use the Calendar pop-up menu in the upper right corner to select which calendar (if you use more than one) to apply the Meeting to.

Use the row of buttons above the subject line, shown here, to respond.

Click the Accept, Tentative or Decline button to send an automatic message with your response, and (in the case of Accept) add the Meeting to your calendar. This closes the invitation message and (if the Preferences are set to their defaults) deletes it. Preferences are discussed in the Appendix on Page 24.

If the Preferences are set to retain meeting invitations, it is important to click the Accept, Tentative or Decline button only once, otherwise multiple E-mail responses are generated. Click the Close button after you have responded.

To send a response with feedback or explanation, click the arrow to the right of one of the response buttons. The Accept pop-up menu is shown to the right. Select Edit Reply to send a response with more details.
A customized response message is shown below.

The response contains the original invitation text, along with ‘Yes, I will attend.’ ‘I might attend.’ or ‘No I won’t attend.’

In other respects, this E-mail message behaves like any other. Add any desired text and attachments, then click Send to respond to the invitation. Click Cancel to discard any changes and return to the invitation message.

Meetings are often moved to a different time, moved to a new location, have the guest list altered, or even get cancelled. When this happens each invitee receives a new E-mail notification. An example of a cancellation notice is shown below.

Cancellations are different from other meeting change messages, in that you are not provided with response buttons. You can reply to it just like an ordinary message, however.
An example of a meeting modification notice is shown below.

The following meeting has been modified:

Subject: CITS General Mtg
Organizer: "Ann Marie Pinto" <apinto@umassd.edu>
Time: Wednesday, August 13, 2008, 9:30:00 AM - 11:30:00 AM (GMT-0500) USA Eastern (USA)
Marrera@umassd.edu; adahdwaI@umassd.edu; "Andrew Darling" ...

Use the Accept, Tentative or Decline button to respond, just as you do when you first receive an invitation.

3.3 Receiving Responses from Others

Meeting responses are also sent and received via E-mail. These messages have a special icon in your Zimbra mailbox. Two example responses are shown below.

The message subject indicates the sender’s response to your Meeting invitation.
Open the message to reveal any additional information in the response. The Accepted message above is shown opened here.

Subject: Accepted: Final Zimbra Documentation Review

Richard Reilly has accepted your invitation.
4.a  Creating and Deleting Calendars

Zimbra allows you to separate different types of activities, such as work or personal activities, into different calendars. Each calendar has a color associated with it. Each calendar can be viewed or hidden, and shared with others independently.

To create a calendar, click the **New Calendar** button in the left pane. The **Create New Calendar** dialog box is displayed, as shown below.

```
Create New Calendar
Name: Training
Color: Green

- Exclude this calendar when reporting free/busy times
- Synchronize appointments from remote calendar

OK Cancel
```

Enter a **Name** for the calendar in the field provided.

Select a **Color** from the pop-up menu. Eight colors are available, and each can be used more than once.

Select the **Exclude** checkbox to have all activities from this calendar ignored (reported as ‘Free’) when scheduling.

Select the **Synchronize** checkbox to sync the calendar with another internet-accessible calendar. You must know the URL of the remote calendar.

Click **OK** to create the new calendar, or **Cancel** to discard it. Once created, the new calendar appears in the Calendars list, shown here. Calendars are always sorted alphabetically.

To remove a calendar, Right-click or `<CONTROL>`-click the calendar name in the Calendars list. A pop-up menu is displayed, as shown here. Choose **Delete**. A confirmation dialog box is displayed, as shown below.

```
Confirmation
Are you sure you want to permanently delete the "Training" calendar?
Yes No
```

Click **Yes** to delete the calendar and all associated events. *This cannot be undone!* Click **No** to cancel the deletion.

```
Calendars
Calendar Personal Training

Share Calendar Delete
Edit Properties Reload
Launch in a separate window
```

**Note:**
The default calendar cannot be deleted.
4.b Displaying Calendars

The display of events from different calendars can be turned on and off. This makes it easy to see only the desired calendar items. To do this, use the checkbox next to each calendar name in the left pane.

An example is shown below with both the Calendar and Personal events displayed.

The same calendar is shown below with only the Calendar events displayed.

The same calendar is shown again with only the Personal events displayed.
4.c  Sharing Your Calendar

You can share your calendar with others. This facilitates group scheduling and project management. To grant access to your calendar, Right-click or <CONTROL>-click the calendar name in the Calendars list, and choose Share Calendar. The Share Properties dialog box is displayed, as shown below.

First, select a type of user to share your calendar with. UMass Dartmouth Zimbra users are Internal. They use their E-mail username and password for Authentication. When granting access to External users, you must select a password for them to use. For security reasons, CITS strongly discourages granting Public access to any calendar.

Second, enter the E-mail address of the recipient into the field provided. Note that UMD E-mail aliases (e.g. Rich.Legault@umassd.edu) do not work. The original address (e.g. RLegault@umassd.edu) must be used.

Third, select a Role using the radio buttons. These options are available for Internal users only. Select None to give the recipient no access. Select Viewer to allow the recipient to see events, but not make changes. Select Manager to allow the recipient to see and alter events. Select Admin to allow the recipient to see and alter events, as well as Create and Delete calendars.

Click the Allow checkbox to grant the recipient access to Private events.
Like Meeting invitations, Shared Calendar Notifications are sent and received via E-mail. By default, a standard message is created containing a link to the shared calendar. An example is shown on Page 23. Use the message pop-up menu, shown here, to create the share without sending a message, add a comment to the standard message, or create your own message.

The URL for the shared calendar is shown in the Share Properties dialog box. An example is shown below.

This address can be used to access the shared calendar directly. It generally takes the form: https://zimbra.umassd.edu/home/{username}/{calendar name}.

Click OK to share the selected calendar, or Cancel.

To view or alter the sharing settings of a calendar, and set other calendar options such as color, Right-click or <CONTROL>-click the calendar name in the Calendars list, and choose Edit Properties. The Folder Properties dialog box is displayed, as shown below.

Use the Color pop-up menu to change the calendar color.

Users with access to the selected calendar are shown in a list, with three links to the right of each name:

   Click Edit to make changes to the sharing settings for that User.
   Click Revoke to remove the User from the list.
   Click Resend to send a new Sharing Notification message.

Click OK to save any settings changes, or Cancel to discard them.
4.d  Accessing Other Calendars

Calendar Sharing Notification messages are received via E-mail. These messages allow access to shared calendars. An example is shown below.

The opened message is shown here.

Click **Accept Share** to add the shared calendar to your Calendars list. The Accept Share dialog box is displayed, as shown below.

Enter a **Name** for the calendar in the field provided.

Select a **Color** from the pop-up menu.

Use the next pop-up menu to send an E-mail reply if desired.

Click **Yes** to accept the share, or **No** to reject it.

Shared calendars are listed below your own calendars in the Calendars list. An example is shown here. They are sorted alphabetically. Shared calendars are displayed and hidden using the checkboxes to the left of each name, just like your own. The Schedule view, discussed on Page 5, is helpful when comparing different User’s calendars.

**Note:**
If you know the URL of a shared calendar, you can enter it manually using the **Link to Shared Calendar** command. Right-click or <CONTROL>-click the Calendars bar to access this command!
**Zimbra Calendar Preferences**

There are several default settings that can be customized to meet your needs. To access these settings, click the **Preferences** tab, then click **Calendar**.

In the **General** section, the default view can be selected, as well as reminder time and behavior. Invitations can be retained after you respond by deselecting the ‘Delete Invite on Reply’ checkbox.

**Permissions** can be set to allow or disallow users access to your free/busy information. Be sure to discuss any changes to this section with your supervisor.

Click **Save** (in the upper left corner) to save any changes, or **Cancel** to discard them.