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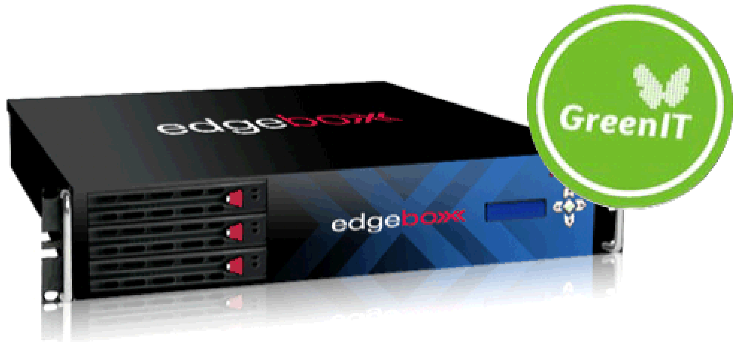
Critical links

edgeEXCHANGE

Quick Start Guide



Contents

Purpose of this Document

This guide is intended to get a new user up and running with edgeExchange. It takes a pragmatic approach and tackles only those features which a user needs to understand to quickly make effective use of the application. For additional details please refer to the online user manual (found in the top left hand corner of the screen under “Manual/Help”).

What is edgeExchange?

edgeExchange is a groupware package that can be installed on edgeBOX to enable shared calendars, contacts, resources and tasks. It also provides web mail and together with the other features it acts as a single portal where a user can manage their knowledge base.

Accessing edgeExchange

There are two main ways of accessing edgeExchange: through the web-based interface or through your own groupware client such as Outlook and Thunderbird.

Even if you use your own groupware client you will still need to access the web-based interface to schedule meetings and set up your preferences.

Using the Web-based Interface

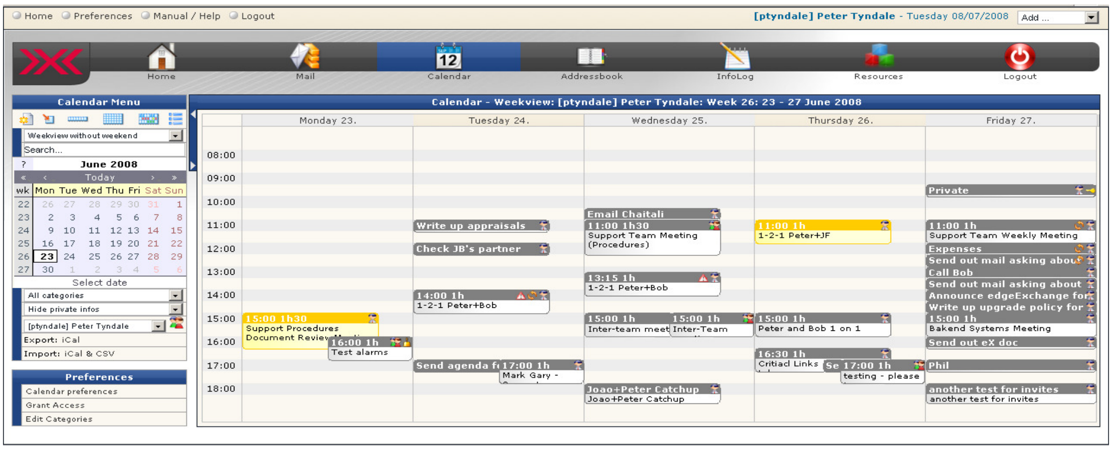
The interface can be accessed from the following link:

https://<your.edgebox.ip>/groupware

Bookmark this page for easy access in the future.

Usernames and passwords are the same as those used for your email account. Contact your edgeBOX administrator if you have forgotten your credentials.

Once you login the web-based interface looks like this:



In the very top left of the screen there are options to configure preferences and view the online help.

Below that are icons that allow you to access the different functions which are:

Home – gives a 5-day week view of your calendar

Mail – allows you to view, compose and organise email

Calendar – allows you to view, create, organise and share calendar events

Addressbook – allows you to view, create, organise and share contacts

Infolog – allows you to view, create, organise, delegate and share tasks

Resources – allows you to view and book resources such as meeting rooms and equipment

In some windows you will see a book icon in the top right hand corner. Click on it to receive context sensitive online help.

Using Outlook or another Groupware Client

If you use Outlook or some other groupware client you can just carrying on using it as normal but you need to synchronise you calendar, tasks and contacts with edgeExchange to be able to share your information.

Note that you do not need to synchronise all three of these items, you can just synchronise calendar entries if all you want to do is share your calendar for example. Synchronising tasks and contacts, however, has the additional benefit of creating a backup of them in edgeExchange so even if you don't intend to share them it can still be a good idea to do it.

Two-way synchronisation is performed between the groupware client and edgeExchange meaning that any changes in **either** system are replicated onto the other system. So a new entry added in Outlook, for example, will appear in edgeExchange, and if the entry is then deleted from edgeExchange it will get automatically deleted from Outlook.

Synchronising with edgeExchange

To synchronise Outlook you will need to perform the following steps:

1 - Install a Windows Security Certificate to allow you to connect to edgeExchange over a secure link (https rather than http). See Annex A for detail on how to do this.

2 - Download Funambol from the web. This is a 3rd party utility that allows Outlook to synchronise (sync) with edgeExchange. You can find it here (choose the one for Outlook):

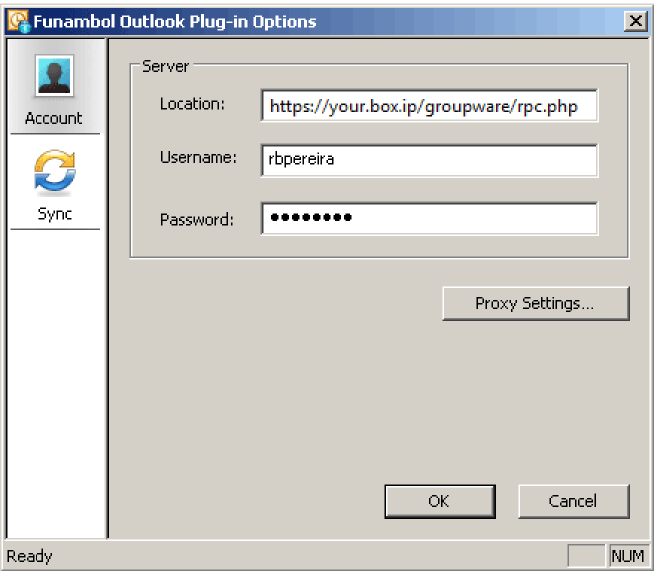
   a. https://www.forge.funambol.org/download/

3 - Install it (accept the license and choose all the default options).

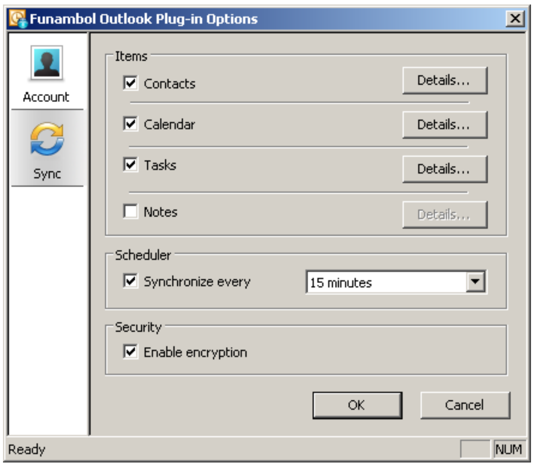
4 - Configure it (an icon and an extra menu item will appear within Outlook that will let you change the options for Funambol or you can also use the new "Funambol" menu that appears in the Outlook menu bar).

Use the following settings for your Account:

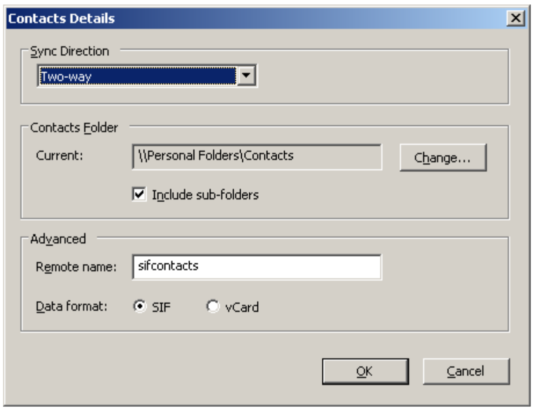
Location: https://<your.edgebox.ip>/groupware/rpc.php
Username : same as your email username
Password: same as your email password



In Tools->Options->Sync, select only Contacts, Calendar and Tasks, the other items are not supported yet.

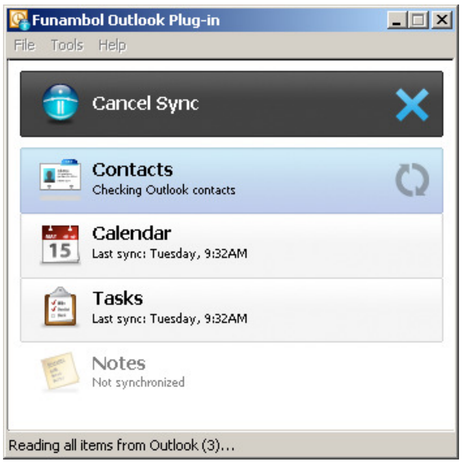


In the Details section for each Item configure the following:
Sync Direction: Two-way
Remote Names: sifcontacts (use sifcalendar and siftasks for the other Items)
Data Formats: SIF



1. Run a sync either by clicking on the blue icon that appears in Outlook on the new Funambol toolbar or by selecting “Sync All” from the Funambol menu.

   Synchronisation can be a manual process, so that it happens only when you click a button, or it can be automatic, so that it happens every 15 minutes or so. To ensure you are always looking at the most up-to-date information with entries that others have added, it’s recommended to set Funambol to sync every 15 minutes.



Note that the first synchronisation may take several minutes and use a lot of computer resources but future syncs just check for differences so they are much quicker.

If you would like to sync with other groupware clients or mobile devices please contact your support team for assistance.

Mail

The Mail feature of edgeExchange can be used in two different ways:

1 - You can use it as your default email client to compose, view and store all your emails
2 - You can use it like a webmail account to get to your email whenever you don't have access to your own PC or laptop.

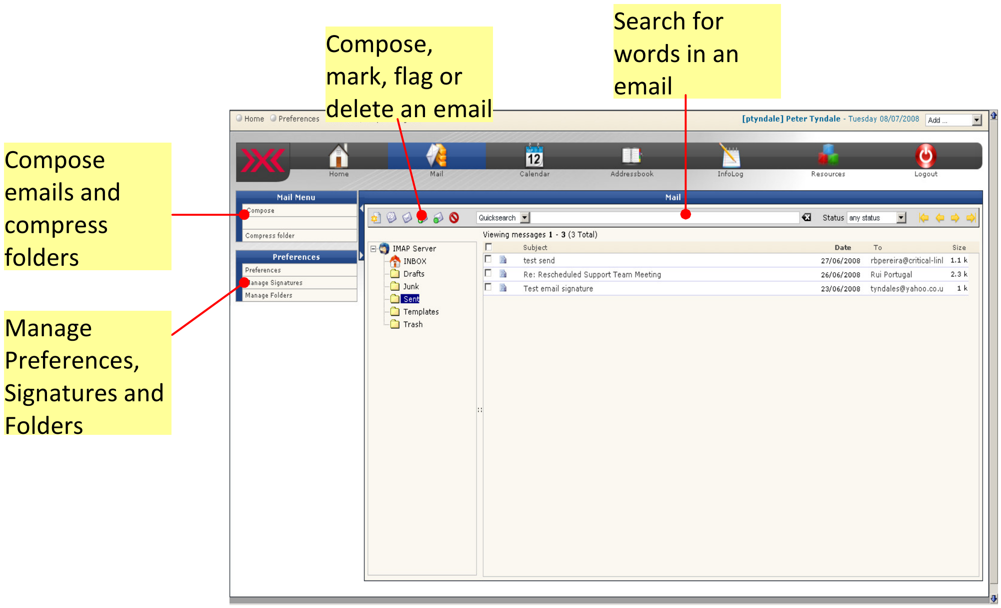
How to Use Mail

General Overview

edgeExchange Mail uses your normal email account but does not store email unless you are using it as your main email client. In other words, if you are using an email client such as Outlook, when an email is sent to your account you will be able to see it in the Inbox of edgeExchange Mail before it gets delivered to Outlook, but once it has been delivered to Outlook it will no longer appear in edgeExchange.

You can create folders within edgeExchange to store email (see Known Issues section of this document) and create signatures to add to outgoing mail.

Composing, viewing and managing email is done through the following interface:



Calendar

One of the most useful features of edgeExchange is calendar sharing.

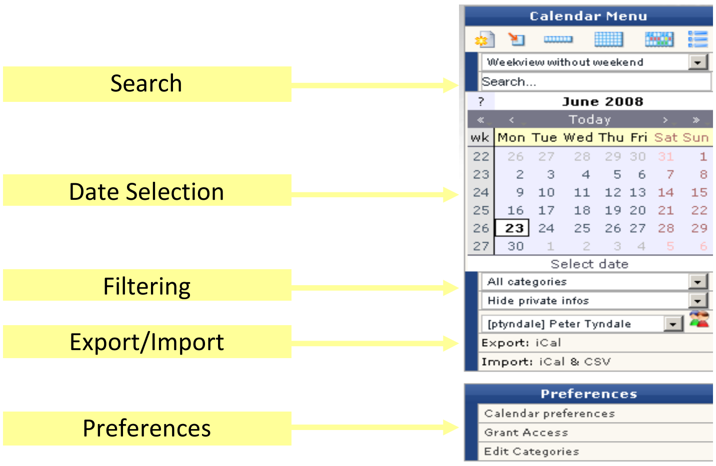
Calendar sharing features allow you to:
- Set up groups of users who can be notified of appointments
- Share your calendar with specific users and groups
- Keep certain calendar entries private so nobody else can see them

It also has common features available with most calendar applications such as the ability to:
- Set up recurring entries
- Send notifications to all invited parties
- Set alarms to remind when meetings are due
- Create different categories for calendar entries and use them to label entries, e.g. phone call, online meeting, vacation.

How to Use the Calendar

General Overview

Calendar View



Calendar View

The screen is laid out with menu bars on the left and the calendar view on the right. You can change which part of the calendar you are looking at by clicking on the icons just below the title “Calendar Menu”. Hover your mouse pointer over the icons for a description of what they do:

- Day view
- Week view
- Month view
- Planner
- List view

You can also select the view from the drop-down-list just below these icons (weekview is the most useful).

Search

Next there is a search box which allows you to search for any text that occurs in calendar entries, just type it in and hit return. Note that search results are displayed in listview, you need to switch back to weekview or whatever your normal view is so you can see your calendar again.

Date Selection

Below the search field is a calendar which lets you select which dates you want to display. There is a title bar underneath the calendar which is similar to hover-help and gives information on what action will be performed if you click somewhere in the calendar.

Filtering

Underneath the calendar there are three drop-down-list boxes which allow you to filter calendar entries by:

1 - **Category** – by default you can see all types of entries in the Calendar but using this filter you can display only entries of a certain type, e.g. meetings, phone calls, vacations (see below for how to set up Categories).

2 - **Hide Private Info** – by default you see all entries but with this filter you can hide events that you have marked as private (you select this option when you create a Calendar entry).

3 - **Users and Groups** – by default your personal calendar is shown and the drop-down-list includes groups you belong to. By clicking on the icon you can view calendars of other people and groups who have shared their calendars with you. When you click on the icon a magnifying glass will appear . Clicking on that will allow you to search the contact database.

Export/Import
This allows you to export calendar entries in iCal format or import in CSV or iCal format.

Preferences
Calendar Preferences – allow you to change defaults for preferences, e.g. when the working day starts and ends.

Grant Access – allows you to give other people or groups access to your calendar (and what type of access they can have, e.g. to add/delete entries or just to view).

Edit Categories – allows you to set up labels for calendar entries so you can differentiate different types of events, e.g. meetings, phone calls, vacation. You can also colour code entries and add icons to them to make them stand out from others.

How to set up a Group

Groups need to be set up by the system administrator so please email <Your Support Team e-mail> if you wish to set up another group or change group membership.

How to Share your Calendar

Click on the “Grant Access” link under the “Preferences” menu on the bottom left hand side of the main screen. You can choose which groups or individuals to share your Calendar with and what access rights they have.

To view someone else’s calendar they must have granted you access rights. You then change the filter on the left hand side of the screen and select the user from the list. See the Filtering section of the General Overview part of this document for more information.

How to Schedule a Meeting

There are two ways to schedule a meeting:

1. Schedule it in your normal groupware client if you are using one (e.g. Outlook) and sync it with edgeExchange or
2. Schedule it directly in edgeExchange

WARNING! If you want to schedule a meeting that involves other people in your Company then you should schedule it through edgeExchange because the other attendees may only be using edgeExchange for their calendaring so meeting requests from Outlook or other groupware clients will not automatically appear in their Calendar.

To add a new appointment click on the calendar menu or the icon or, in the main calendar panel, click on the desired **Starting time** for the new appointment – then the appointment will be automatically preset with that date and time.

When you add a new appointment the screen shown below will open. In this screen you can:

General – Add a title for the meeting, specify the date, time and duration, location, priority, whether it is non-blocking (so other people with access to your calendar can schedule over it), whether it is a private entry that you don't want other people to see and what category of appointment it is (meeting, phone call etc…)

You also have a button called "Freetime Search" that lets you check the calendars of everyone you invite to the meeting to see when there is a gap in their diaries.

Ensure you fill in the Title at the top of the window before entering other data.

Description - Add a description or agenda, for example, for the appointment.

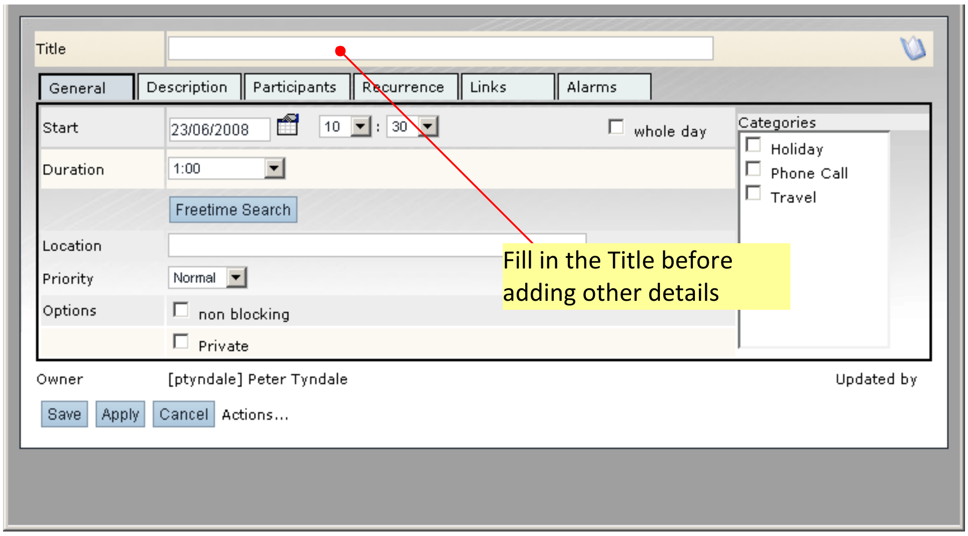
Participants - Invite participants by either selecting them from the drop-down-list box or by searching for them in the contact database. You can also add Resources to the meeting which will reserve them so that nobody else can use them during that time period, e.g. reserve meeting rooms, projectors.

Recurrence - Allows you to define if the same meeting happens on a regular basis, e.g. every week, every month.

Links - These allow you to link the calendar entry to other entries, to contacts, to tasks or resources. This can be a good idea if you are managing a project and want to link actions and resources together for tasks needed to complete a project.

Alarms - If you set an alarm you will be emailed a reminder before the meeting starts. You can define when the reminder should be sent and to whom.

At the bottom of the screen you can “Save” which saves and closes the screen, “Apply” which applies the changes but keeps the window open, “Cancel” which closed the window without saving and “Actions” which lets you “Copy” or “Export” the calendar entry or “mail all participants” which composes a new email to all participants filled in with the meeting details and can be used to send reminders or an agenda, for example.

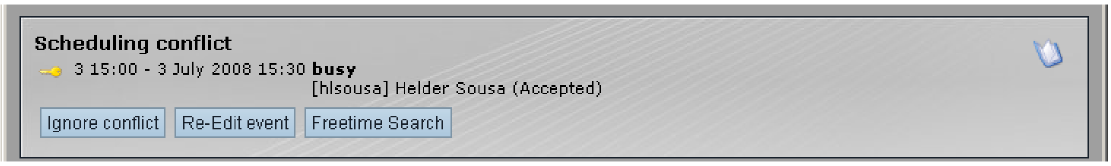


The following icons appear on meeting entries:

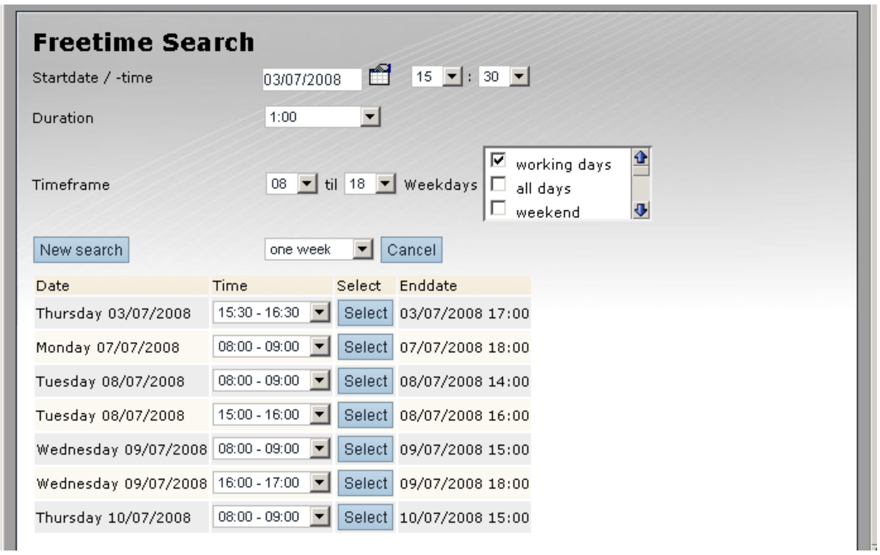
- : high priority appointment
- : private appointment
- : recurring appointment
- or : participating users or user groups
- : non-blocking appointment
- : booked resources
- **Participants** (user or groups) will be shown with the respective **status**: **tentative acceptance** , **accepted** , **rejected** and **no response** .

Hovering your cursor over a calendar entry will pop-up a window showing details of that entry and single-clicking on the entry will open it.

If there is a conflict when you schedule and appointment you will receive a warning and be able to reschedule the meeting:



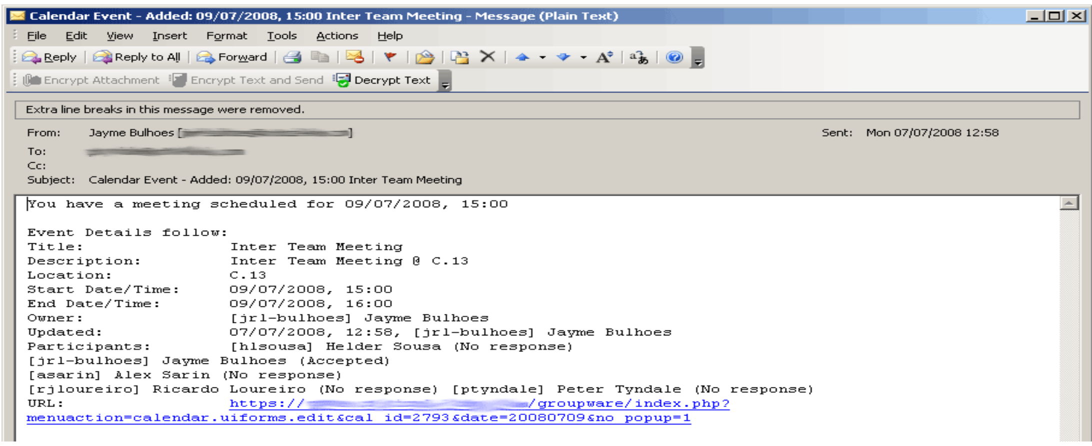
If you click on "Freetime Search" you will be able to find a date and time when all participants are available:



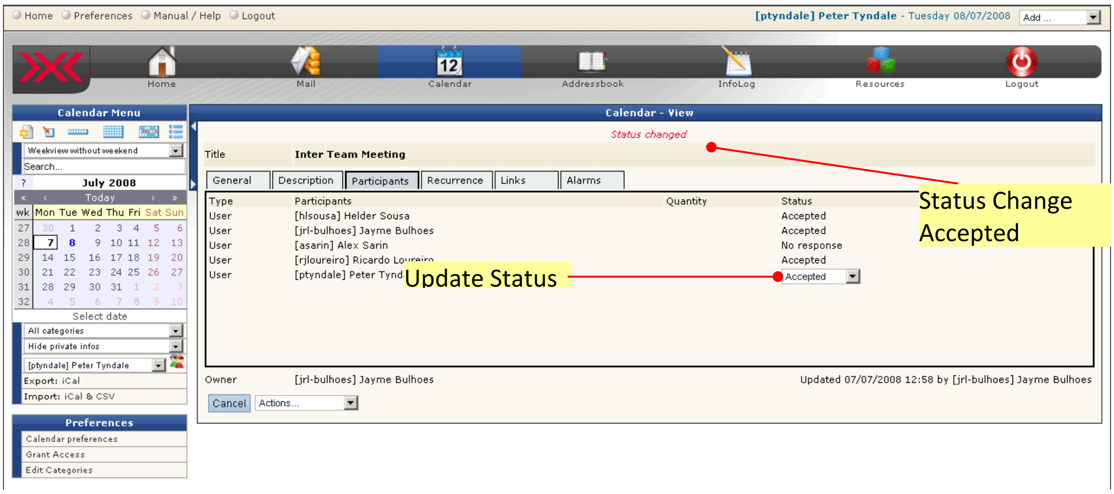
Note that your calendar view of edgeExchange will not refresh automatically so you need to manually refresh the page to ensure you are looking at the latest information.

How to Accept a Meeting Invite

When a meeting is scheduled by someone else in edgeExchange an invite is emailed to you. It contains details of the meeting and a link to the meeting entry in edgeExchange:



If you click on the link it will take you to the edgeExchange website and open the meeting entry. You need to click on the “Participants” tab, change your status to “Accepted” (or another status) and a message will appear at the top of the window saying “Status Changed”. You can now close the window (there is no “Save” button).



Address Book

Address book is similar to Contacts in Outlook. By default, all your Company employees who have email addresses have entries created for them in the Address Book with their username and email address etc… included.

How to Use the Address Book

General Overview

The screen consists of a main view which displays a list of contacts and some options in a menu bar on the left.

From the menu bar you can “Add” new entries, perform an “Advanced Search”, import contacts in CSV format by clicking on “CSV-Import”, change “Preferences”, “Grant Access” to others to view your personal contacts and “Edit Categories” that can be used to filter contacts.

Above the main screen are a number of drop-down-list boxes and a search field which can all be used to filter entries:

All Contacts - This lets you look at “All contacts” or to group them by organisation, organisation location or organisation department. This can be useful when you are trying to find someone and you are not sure of their name. Details of the organisation are set up on the "General" tab for each contact.

Category – As with Calendar entries this lets you filter by categories that you can set up, e.g. friends, colleagues, partners.

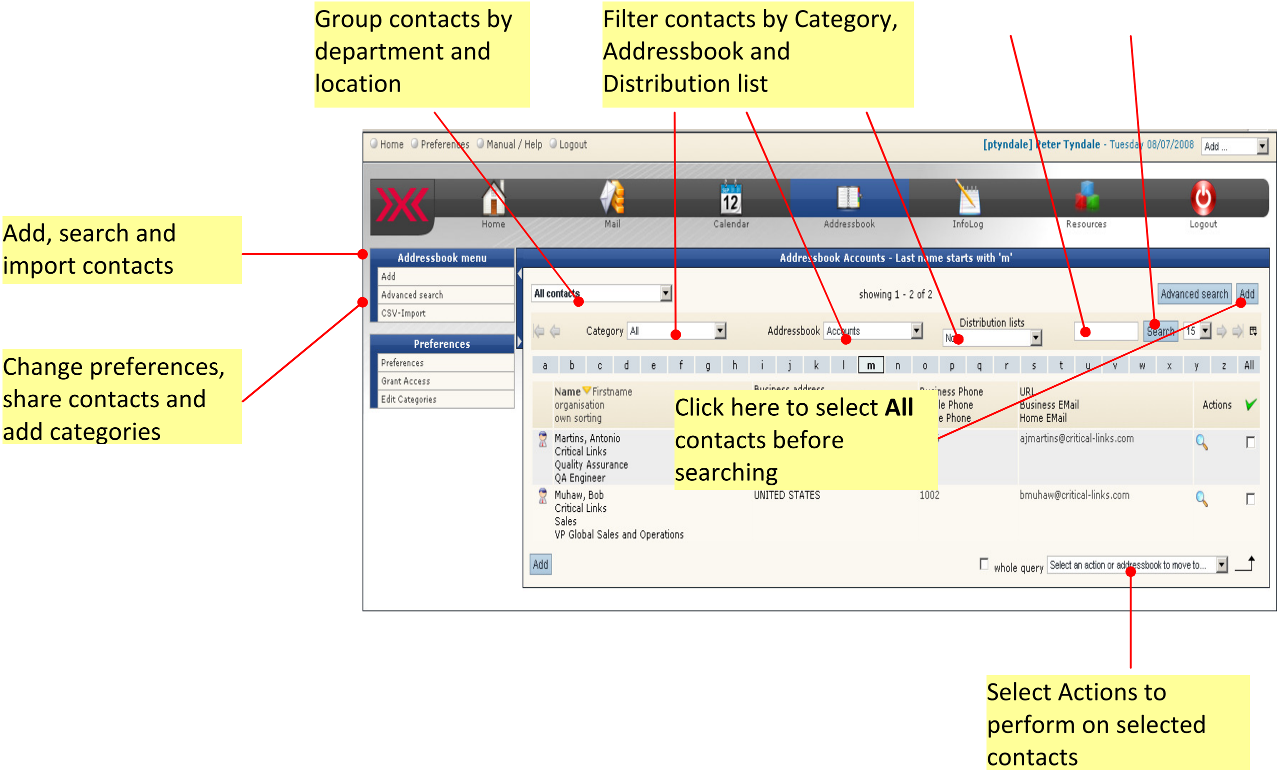
Addressbook - All your Company employees will have been setup in an addresbook called "Accounts". You can also set up your own contacts in your "Personal" addressbook and import them by using the "CSV-Import" feature or by synchronising with another addressbook, e.g. the one in Outlook.

Distribution Lists - You can set these up by selecting "Add a new list" from this drop-down-list box. You can then assign contacts to them by checking the box next to the contact and choosing "Add to distribution list" from the actions at the bottom of the page.

Search - By typing a search string in this box you can search all contacts that are displayed on the screen.

Note that only the contacts displayed on the screen will be searched, NOT the whole Addressbook. To search the whole Addressbook you need to click on the "All" button on the right hand side of the screen at the end of the alphabet list and then run a search. This also applies to the "Advanced Search" feature.

Entries to List - This drop-down-box determines how many entries are shown on the page.



How to Add a Contact

Click on any of the “Add” buttons. This will open a window where you can enter: “General” details such as company name and contacts; “Private” information, which is personal information such as home address; “Details” for assigning the contact to a Category and adding notes; and “Links” which let you link the contact to a task or calendar entry.

There is also a drop-down-list box at the top of this screen which lets you determine how the contact is displayed in the Addressbook.

How to Find a Contact

You can list entries where contact’s surnames start with a certain letter by clicking on one of the letters of the alphabet displayed at the top of the contacts screen.

You can use the “Search” box on the top right of the screen by entering text and clicking on search (remember to select “All” records first). Use the drop-down-list box next to the Search button to determine how many results are shown on the screen.

You can also run an “Advanced Search” by clicking on the button above the normal Search button. This opens a screen where you can enter search criteria for all the different elements of a contact and you can also use logical operators to refine the search (these are listed at the bottom of the search screen). So, for example, you could search for contacts with the surname Collins and who live in New York.

Note that when you run an Advanced Search the results are displayed in the main contacts screen. You will need to close or move the Advanced Search window to see the results.

How to Edit a Contact

Entries have symbols next to them which indicate which actions you can perform on them: display , edit , delete or mark a contact.

Note that the only entry you can edit in the "Accounts" Addressbook is your own.

Clicking on the edit icon will open a screen where you can make changes to the contact. Click "Save" or "Apply" to save the changes.

InfoLog

InfoLog is a task manager that lets you create different categories of task (ToDo, Phone Call, Email, Note), track progress of the tasks, delegate the tasks and track their progress. It can also be used as a CRM (Customer Relationship Management) system.

How to Use the InfoLog

General Overview

The screen consists of a main view which displays a list of tasks and some options in a menu bar on the left.

From the menu bar you can click "InfoLog List" to display the list of tasks, "Add" new entries, change "Preferences", "Grant Access" to others to view your personal tasks and "Edit Categories" that can be used to label and filter tasks.

Above the main screen are a number of drop-down-list boxes and a search field which can all be used to filter tasks:

Category – As with Calendar and Addressbook entries this lets you filter by categories that you can set up, e.g. Project name, type of task

No Filter – You can filter based on the owner and status of the task, e.g. see any tasks that have been delegated and have overrun.

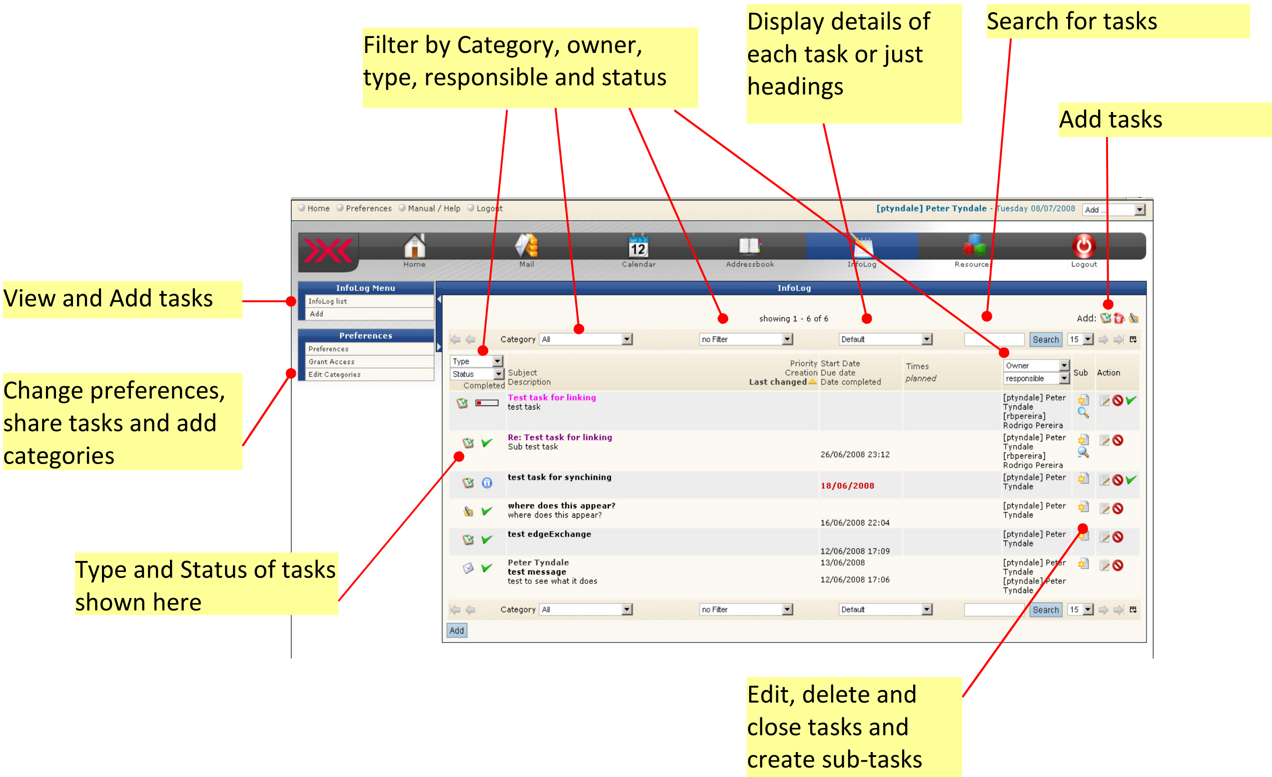
Default – This defines whether you can just see a summary of the task or the summary plus details of the task displayed in the list.

Search - By typing a search string in this box you can search all tasks for that string.

Entries to List - This drop-down-list box determines how many entries are shown on the page.

Type, Status, - These filters are at the top of the first column of the list and let you narrow your selection criteria by the type of task it is and how much progress has been made on the task.

Owner, Responsible - These filters also let you narrow your selection criteria by the person that owns or is responsible for a task.



How to Add a Task

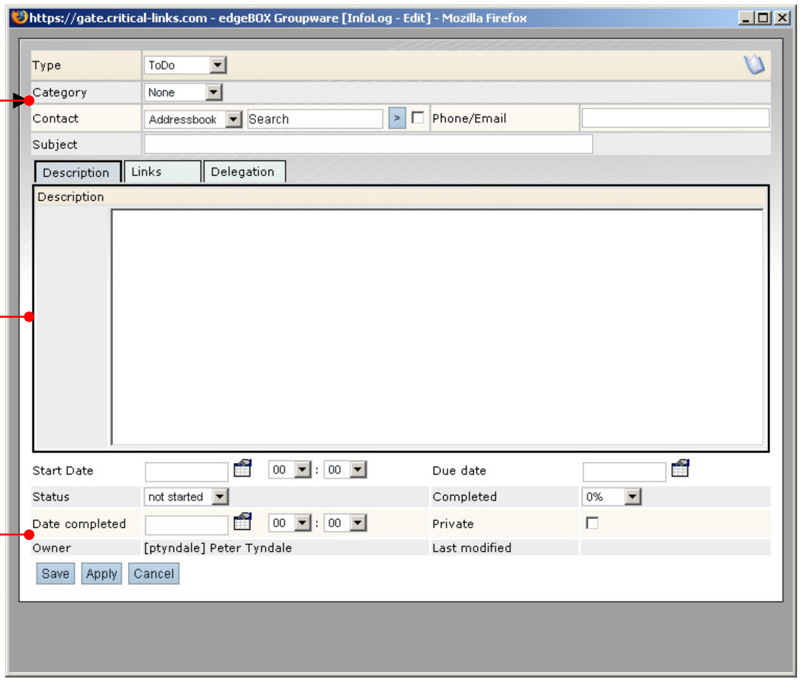
Click on one of the “Add” buttons and a window will open that lets your record all the details of that task (see annotated screenshot below).

Note that if you enter a number in the % completed field it is displayed on the main InfoLog screen as a bar which is filled in with whatever % you have specified. This provides a quick way to check on the status of a task.

Define the type of task, assign it a category, include any contacts and insert a subject

Add a detailed description, link it to a contact, calendar entry or another task and delegate the task to person

Add date information



How to Find a Task

You can either enter a search string in the “Search” box on the main screen or use the filter options to limit the records displayed.

How to Edit a Task

To the right of each task there are a number of symbols that let you perform actions on the tasks:

- to add a new task as a **subentry** of the existing entry (e.g. for partial orders resulting from a telephone call with a client...) or as a **reply** to a delegated task.
- to get to parent task entries.
- to get to subentries.
- to edit an entry.
- to delete an entry.
- to close an entry including all subentries, e.g. status is set to 'done' (possible for all subentries).

If you click on to edit the task it will open a window and allow details to be updated. Click “Save” or “Apply” to save the changes.

Resources

The Resources section of edgeExchange allows you to define different resources such as rooms and equipment that can be allocated to tasks or reserved for meetings.

How to Use Resources

General Overview

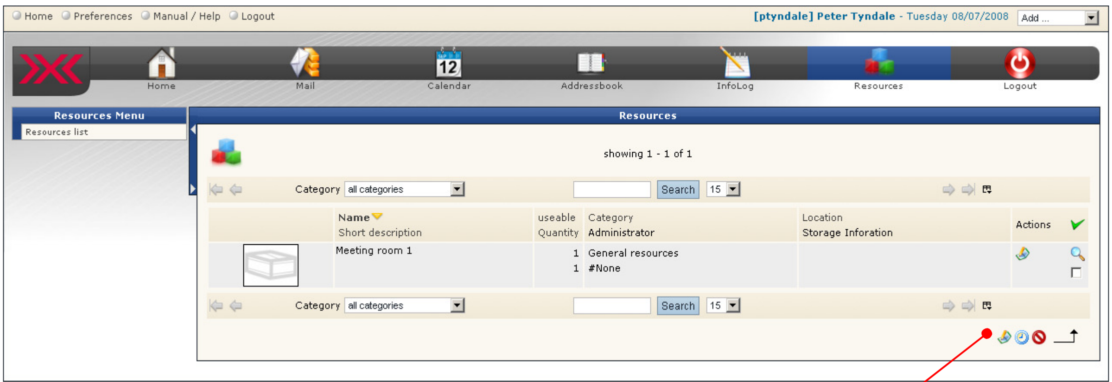
The main screen shows which resources are available and allows you to filter based on category or search for specific items.

To book a resource click on the icon next to the resource of check the boxes of each resource you want to book and click on the same icon at the bottom of the screen. This will open up a calendar entry where you can specify when you want that item reserved for.

You can also book Resources directly from within the Calendar screen by selecting them from the “Participants” tab when you set up an appointment.

Clicking on the icon shows the calendar for the selected resource and it can be booked by setting up an appointment from within the calendar screen.

By default there are no entries in the Resources section of edgeExchange. Please contact your edgeBOX Administrator if you would like a resource to be added.



Click on these icons to book a resource, check the calendar for the resource or delete it

FAQ

Q: "Apply" and "Save" seem to do the same thing when adding a calendar entry

A: “Save” performs a save-and-close type operation whereas “Apply” updates the entry but keeps your current window open.

Q: If I schedule a meeting in Outlook and include other people will it show up in edgeExchange with the other people also listed as invited?

A: No. The entry created in edgeExchange will only show you as being invited to the meeting. If you want other people to show up in the edgeExchange meeting you need to create the entry in edgeExchange and sync it back to Outlook.

Q. Why are there different calendar entries in Outlook and edgeExchange?

A. Make sure you are looking at the same calendars. In edgeExchange you can filter entries so you just see personal ones or you also see those created by the groups you are part of as well as applying other filters. Check entries for groups you are part of and check if there are any other filters you are applying to see if these show your “missing” entries. In Outlook you will see all appointments no matter which group scheduled them or which filters you apply in edgeExchange.

Q. Why doesn’t drag and drop of calendar entries work?

A. Make sure you have this set up in your Preferences: go to “Preferences -> Common Preferences” and set “**Enable drag and drop functionality (experimental)”** to **“Yes”**.

Known Issues

Duplicate entries – synching between Outlook and edgeExchange can sometimes create duplicate entries in the Outlook Calendar and Contacts. These need to be manually deleted.

Resources Calendar does not show – an error occurs when you try to view the calendar for a resource. This will be fixed in the next release.

Annex A - Installing the SSL certificate on your system

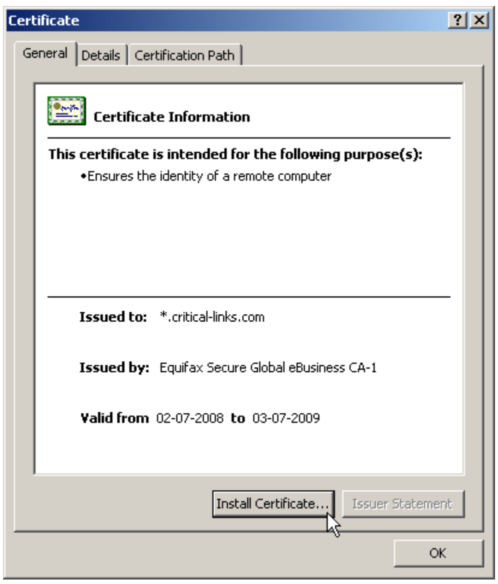
These instructions apply to Microsoft Windows XP and Vista.

Using Internet Explorer, access the server on the following link:

https://<your.edgebox.ip>/

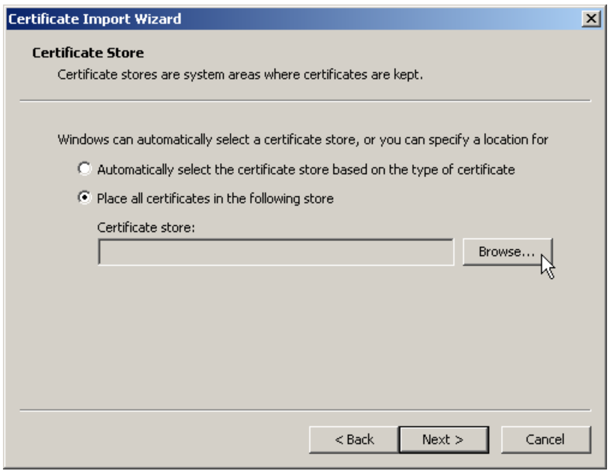
After the page loads, click on the “golden lock” next to the URL bar. You’ll be presented with a Website Identification pop-up:

Click on “View Certificate”. A “Certificate Information” window will show:



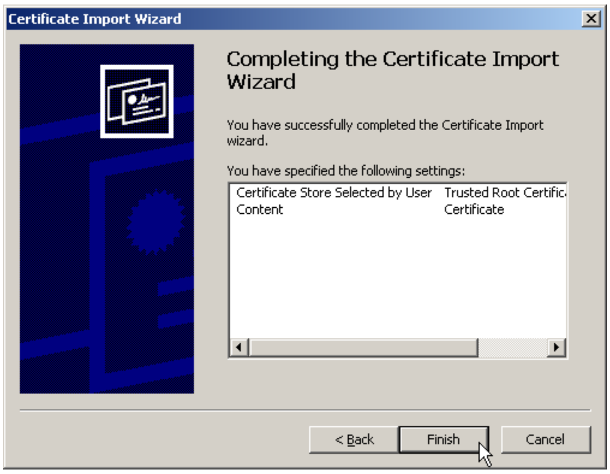
Click on “Install Certificate…”. The “Certificate Import Wizard” will show:

Click “Next”:



Select “Place all certificates in the following store” and click to “Browse:

Select “Trusted Root Certification Authorities” and click “OK”, then “Next”:



Click “Finish” and accept - click “Yes” - any import warning:

Your certificate is now installed. You must now restart Outlook for the changes to take effect.