Cisco WebEx Mail User's Guide
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www.webex.com
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Introducing Cisco WebEx Mail

Cisco WebEx Mail provides email and collaboration solutions that allow your organization to manage its messaging and collaboration needs efficiently, without the cost associated with using Microsoft Exchange. For more information, see The technology behind Cisco WebEx Mail (on page 2).

Depending on the service your organization has purchased, you can use one or more of the following tools supported by Cisco WebEx Mail:

- **Microsoft Outlook.** Your administrator has set up a mailbox on the server for you. All you have to do is to connect Microsoft Outlook to the mailbox. You do not have to install any plug-ins and or make changes to your desktop. For details, see Connecting to your mailbox using Outlook (on page 6).
  After connecting Outlook to the mailbox, you can access full functionalities of Outlook on your desktop as if it were running on an Exchange server.

- **Webmail.** The Webmail application lets you view and manage your mailbox via a web browser. If you have no access to Outlook, the rich functionalities of Webmail make it easy for you to manage your emails, calendars, tasks, notes, contacts, and so on. For details, see Using Webmail (on page 15).

- **Microsoft ActiveSync-enabled devices.** You can send and receive email messages and meeting requests as well as manage your mailbox using an ActiveSync-enabled device, such as an iPhone or a Motorola Q running Windows Mobile 6.0.
The technology behind Cisco WebEx Mail

Cisco WebEx Mail utilizes an email and collaboration server that is built on a powerful and highly reliable Linux solution.

**Truly compatible infrastructure**

The server supports network protocols that are compatible with Microsoft Exchange. Microsoft or Microsoft-related software, such as Microsoft Outlook, Active Directory, and existing Exchange servers, can communicate with the server in the same way they do with Exchange. As a result, you can expect to use your Microsoft software with full functionalities.

**Connecting to the server over the Internet**

If you were required to connect to your email server using Virtual Private Network (VPN) while traveling or working outside your organization’s firewall, you might have experienced slow connections, frequent time-outs, or limited Outlook functionalities.

Cisco WebEx Mail lets you access the server over the Internet using RPC (Remote Procedure Call) over HTTPS. This connection method, also known as Outlook Anywhere, is secure and fast and preserves full functionalities of Outlook. Employees in global teams can particularly benefit from using this connection and increase their productivity.

**Webmail powered by AJAX**

Powered by the AJAX (Asynchronous JavaScript and XML) technology, Webmail lets you access your email, calendar, tasks, notes, and contacts by using a web browser. This browser-independent web application also provides a rich feature set and an easy-to-use user interface. When away from your desktop, you no longer feel hindered by the limited functionality of your old web-based access.

### System requirements

<table>
<thead>
<tr>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>RPC (Remote Procedure Call) over HTTPS</td>
</tr>
<tr>
<td>• Your administrator has configured the server to permit connections over HTTPS. For more information, contact your administrator.</td>
</tr>
<tr>
<td>• You must have Outlook 2003 or 2007 on your computer. Older versions are not supported.</td>
</tr>
</tbody>
</table>
## Requirements

<table>
<thead>
<tr>
<th>Webmail</th>
<th>Browser requirements:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Mozilla Firefox 2.x, 3.0, or later</td>
</tr>
<tr>
<td></td>
<td>- Internet Explorer 6, 7, or later</td>
</tr>
<tr>
<td></td>
<td>- Safari 4</td>
</tr>
</tbody>
</table>

Microsoft Windows update:
Download an update KB955839, which enables your computer to automatically adjust the computer clock to correctly reflect daylight saving time in different time zones. You can find the download on Microsoft's Download Center.
Accessing Your Mailbox

Your Cisco WebEx Mail administrator has set up a mailbox on the server for you. You can use any of these methods to access your mailbox:

- **RPC (Remote Procedure Call) over HTTPS**
  If you use Microsoft Outlook and need to manually set it up to access your mailbox, see *Setting up Outlook using RPC over HTTPS* (on page 6).

- **Webmail**
  For details, see *Using Webmail* (on page 15).

- **IMAP (Internet Message Access Protocol)**
  - For Mozilla Thunderbird 2, see *Setting up Thunderbird using IMAP* (on page 9).
  - For Outlook 2003 SP2, 2007 SP1 and SP2, and Outlook Express, see *Setting up Outlook using IMAP* (on page 11).

- **Microsoft ActiveSync**
  - For iPhone, iPhone 3G, and iPhone 3GS, see *Setting up ActiveSync on your iPhone* (on page 12).
  - For Windows Mobile 6, see *Setting up ActiveSync on your Windows Mobile phone* (on page 13).
Setting up Outlook using RPC over HTTPS

Your administrator has set up a mailbox on the server for you. All you have to do is to connect Microsoft Outlook to the mailbox. You do not have to install any plug-ins and or make changes to your desktop.

In most cases, your administrator can run a script eliminating the need for you to manually connect Outlook, that is—run a PRF file and modify certain Outlook settings. If your administrator determines that you need to manually connect Outlook to your mailbox, review this section to learn how to do so.


Important: Before starting the procedure, obtain the following from your Cisco WebEx Mail administrator:
- the PRF file. Ensure that you put the file in the C:\ directory.
- your username and password

To connect Outlook to your mailbox:

1. Close Outlook if it is running.
2. Perform one of these tasks, depending on the Windows operating system you have:
   - Windows XP: Select Start > Settings > Control Panel > Mail > Show Profiles.
   - Windows Vista: Select Start > Control Panel > Mail > Show Profiles.
   - Windows 7: Select Start > Control Panel > Mail
3 In the dialog box, select **Prompt for a profile to be used** and then click **OK**.

4 Open the PRF file by copying one of these commands and pasting it at a command prompt, depending on which Outlook version and the type of operating system you have:

```
Outlook 2003

32-bit
"C:\Program Files\Microsoft Office\Office11\OUTLOOK.EXE" /importprf "C:\[filename].prf"

64-bit
"C:\Program Files (x86)\Microsoft Office\Office11\OUTLOOK.EXE" /importprf "C:\[filename].prf"
```
Chapter 2: Accessing Your Mailbox

Outlook 2007

32-bit
"C:\Program Files\Microsoft Office\Office12\OUTLOOK.EXE" /importprf "C:\[filename].prf"

64-bit
"C:\Program Files (x86)\Microsoft Office\Office12\OUTLOOK.EXE" /importprf "C:\[filename].prf"

5 Enter your username and password, and then click OK.
6  Select the profile "Cisco Mail" in the drop-down list, and then click OK.

![Choose Profile](image)

**Note:** Due to a bug in Outlook 2003, you may be prompted to enter your username and password or select the profile repeatedly. While those dialog boxes may appear at the same time, keep open the dialog box for the username and password and close all the other duplicate ones.

You have succeeded in connecting Outlook to your mailbox.

### Setting up Mozilla Thunderbird using IMAP

Cisco WebEx Mail supports Mozilla Thunderbird 2.

Before starting the procedure, obtain these important information for your IMAP (for receiving email) and SMTP (for sending email) servers, respectively, from your Cisco WebEx Mail administrator:

- **IMAP**—your email address, username, password, and the incoming server name
- **SMTP**—the server name. You have to enter this information if you are creating an account for the first time in Thunderbird.
To set up Thunderbird 2 using IMAP:

1. Start Thunderbird.
2. Under Local Folders, click Create a new account to start an account wizard.
3. On the New Account Setup screen, select Email account, and then click Next.
4. On the Identity screen, enter a display name in the Your Name box and your email address in the Email Address box.
5. On the Server Information screen, select IMAP and enter the name of the incoming server.
6. On the User Names screen, enter the username given to you.
7. On the Account Name screen, enter an account name.
8. Click Finish.
9. Select SSL as the security connection by following these steps:
   a) Right-click the account you just created and then select Properties.
   b) In the left panel, under the name of the account, select Server Settings.
   c) Under Security Settings, select SSL, and then click OK.
      If a certificate message appears, accept the certificate.
Specifying an SMTP server

If information of an SMTP server already exists in your Thunderbird application, but you want to add a different SMTP server and use it for your Cisco WebEx Mail account, follow these steps:

1. In the All Folders view, right-click Local Folders, and then select Properties in the menu.
2. In the left pane, select Outgoing Server (SMTP).
3. Click Add.
4. In the SMTP Server dialog box, enter the server name, your username, and the description (optional).
5. Select SSL.
6. Click OK.
7. Optional. Select the new server and then click Set Default.
8. In the All Folders view, right-click the name of your Cisco WebEx Mail account, and then select Properties in the menu.
9. In the Outgoing Server (SMTP) drop-down list, select the server you want.
10. Click OK.

Setting up Outlook using IMAP

To learn how to set up Outlook using IMAP, consult the Microsoft Help and Support website (http://support.microsoft.com/kb/286197).
Setting up ActiveSync on your iPhone

Cisco WebEx Mail supports iPhone, iPhone 3G, and iPhone 3GS.

Before starting the procedure, obtain your email address, username, password and the server name from your Cisco WebEx Mail administrator.

To set up ActiveSync on your iPhone:

1. Add an Exchange account to your iPhone by tapping Settings > Mail, Contacts, Calendars > Add Account > Microsoft Exchange.

2. On the Exchange screen, enter your complete email address, username, password, and description (optional), and then tap Next.

   **Important:** Leave the Domain box blank.

3. Enter the server name in the Server box, and then tap Next.

After you set up ActiveSync, your e-mail, contacts, and calendars are synchronized by default. You can optionally turn off any of them.
Setting up ActiveSync on your Windows Mobile phone

Cisco WebEx Mail supports Windows Mobile 5 and 6.1.

Before starting the procedure, obtain your email address, username, password and the server name from your Cisco WebEx Mail administrator.

To set up ActiveSync on your Windows Mobile 6 phone:

1. On the Home screen, select Start.
2. Select Messaging > Setup E-mail.
3. Enter your complete email address and password, and then select Next.
4. Uncheck Try to get e-mail settings automatically from the Internet, and then select Next.
5. Select Exchange server as your email provider, and then select Next.
6. Read the description on the screen and then select Next.
7. At the Server Address box, enter the server name, and then select Next.
8. On the User Information screen, enter your username and password, and then select Next.

Important: Leave the Domain box blank.

9. By default, contacts, calendar, email, and tasks are synchronized. You can optionally uncheck any of them.
10. Select Finish.
Chapter 3

Using Webmail

Powered by the AJAX (Asynchronous JavaScript and XML) technology, Webmail lets you access your email, calendar, tasks, notes, and contacts by using a web browser. This browser-independent web application also provides a rich feature set and an easy-to-use user interface. When away from your desktop, you no longer feel hindered by the limited functionality of your old web-based access.

With Webmail, you can:

- create and send email messages. More… (on page 20)
- receive email messages. More… (on page 29)
- organize email messages in your inbox. More… (on page 39)
- use folders to organize email messages. More… (on page 44)
- change how information displays in the message list, such as changing the columns and reading panes. More… (on page 49)
- create contacts and distribution lists and import contacts from another email account. More… (on page 52)
- create calendars and share your calendar with someone else. More… (on page 61)
- schedule appointments, meetings, and all-day events on your calendars. More… (on page 70)
- create and edit notes. More… (on page 83)
- create and post information in public folders. More… (on page 87)
- create and assign tasks. More… (on page 93)
- edit your user preferences. More… (on page 99)
- set up rules to manage incoming email messages. More… (on page 107)
- search for email messages and other items such as contacts and notes and save search results for later use. More… (on page 112)
Chapter 3: Using Webmail

Signing in to Webmail

If you do not have your sign-in information yet, obtain it from your administrator.

Follow these steps:

1. Go to your Webmail URL.
2. Enter your username and password and then click Sign In.

Signing out

To prevent unauthorized users from logging in to your email account, especially if you are using Webmail on a shared computer, always log out by clicking this button on the left navigation bar at the end of a Webmail session.
Chapter 3: Using Webmail

Getting oriented in Webmail

After you sign in, your inbox displays by default.

This table explains the key features and helps you get started using them.

<table>
<thead>
<tr>
<th>Feature</th>
<th>What you can do with this feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>No matter which folder you are viewing, the New button is always visible and provides you a quick path to post a message or file in a public folder (more… (on page 91)) and to create</td>
<td></td>
</tr>
<tr>
<td>- an email message. More… (on page 20)</td>
<td></td>
</tr>
<tr>
<td>- a contact. More… (on page 54)</td>
<td></td>
</tr>
<tr>
<td>- a distribution list. More… (on page 57)</td>
<td></td>
</tr>
<tr>
<td>- an activity on your calendar. More… (on page 70)</td>
<td></td>
</tr>
<tr>
<td>- a note. More… (on page 84)</td>
<td></td>
</tr>
<tr>
<td>- a task. More… (on page 94)</td>
<td></td>
</tr>
<tr>
<td>- a folder. More… (on page 46)</td>
<td></td>
</tr>
<tr>
<td>- a calendar. More… (on page 62)</td>
<td></td>
</tr>
</tbody>
</table>

On the left navigation bar…
### Chapter 3: Using Webmail

<table>
<thead>
<tr>
<th>Feature</th>
<th>What you can do with this feature</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Email" /></td>
<td>Click this button to go to your inbox, in which you can:</td>
</tr>
<tr>
<td></td>
<td>• create and send email messages. [More…](on page 20)</td>
</tr>
<tr>
<td></td>
<td>• view and receive email messages. [More…](on page 29)</td>
</tr>
<tr>
<td></td>
<td>• reply to email messages. [More…](on page 34)</td>
</tr>
<tr>
<td></td>
<td>• forward email messages. [More…](on page 35)</td>
</tr>
<tr>
<td></td>
<td>• organize email messages by sorting, filtering, using flags, and assigning levels of importance.</td>
</tr>
<tr>
<td><img src="image" alt="Calendar" /></td>
<td>Click this button to go to Calendar, in which you can:</td>
</tr>
<tr>
<td></td>
<td>• create calendars. [More…](on page 62)</td>
</tr>
<tr>
<td></td>
<td>• arrange your calendars in different views. [More…](on page 65)</td>
</tr>
<tr>
<td></td>
<td>• open a calendar someone else shared with you. [More…](on page 67)</td>
</tr>
<tr>
<td></td>
<td>• share your default calendar. [More…](on page 67)</td>
</tr>
<tr>
<td></td>
<td>• schedule an activity on your calendar. [More…](on page 70)</td>
</tr>
<tr>
<td><img src="image" alt="Contacts" /></td>
<td>Click this button to go to Contacts, in which you can:</td>
</tr>
<tr>
<td></td>
<td>• create contacts. [More…](on page 54)</td>
</tr>
<tr>
<td></td>
<td>• create additional contact folders. [More…](on page 53)</td>
</tr>
<tr>
<td></td>
<td>• view and edit contacts and distribution lists. [More…](on page 56)</td>
</tr>
<tr>
<td><img src="image" alt="Tasks" /></td>
<td>Click this button to go to Tasks, in which you can:</td>
</tr>
<tr>
<td></td>
<td>• create and view tasks. [More…](on page 94)</td>
</tr>
<tr>
<td></td>
<td>• assign tasks. [More…](on page 95)</td>
</tr>
<tr>
<td></td>
<td>• mark a task as completed. [More…](on page 97)</td>
</tr>
<tr>
<td><img src="image" alt="Notes" /></td>
<td>Click this button to go to Notes, in which you can:</td>
</tr>
<tr>
<td></td>
<td>• create notes. [More…](on page 84)</td>
</tr>
<tr>
<td></td>
<td>• view and edit notes. [More…](on page 85)</td>
</tr>
<tr>
<td></td>
<td>• create note folders. [More…](on page 86)</td>
</tr>
<tr>
<td><img src="image" alt="Public Folders" /></td>
<td>Click this button to go to Public Folders, in which you can:</td>
</tr>
<tr>
<td></td>
<td>• create public folders. [More…](on page 89)</td>
</tr>
<tr>
<td></td>
<td>• grant permissions for using a public folder. [More…](on page 89)</td>
</tr>
<tr>
<td></td>
<td>• post information in a public folder. [More…](on page 90)</td>
</tr>
<tr>
<td><img src="image" alt="Rules" /></td>
<td>Click this button to go to Rules, in which you can:</td>
</tr>
<tr>
<td></td>
<td>• create rules to manage incoming email messages. [More…](on page 109)</td>
</tr>
<tr>
<td></td>
<td>• edit rules. [More…](on page 111)</td>
</tr>
<tr>
<td></td>
<td>• organize your rules. [More…](on page 112)</td>
</tr>
</tbody>
</table>
### Feature | What you can do with this feature
--- | ---
![](image) | Click this button to go to the online Help, which provides detailed information and instructions about using Webmail.
![Options icon] | Click this button to go to Options, in which you can edit your preferences for your password, email, calendars, contacts, tasks, notes, and rules. *More…* (on page 99)
![Logout icon] | Click this button to log out of Webmail. *More…* (on page 16)

### From the search toolbar on the top…

<table>
<thead>
<tr>
<th>Feature</th>
<th>What you can do with this feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Search icon]</td>
<td>You can perform a simple search for a message or other types of items by entering a keyword and then clicking this button. <em>More…</em> (on page 118)</td>
</tr>
<tr>
<td>![Search Builder icon]</td>
<td>Search Builder offers advanced search functionalities by letting you further define your criteria. <em>More…</em> (on page 114)</td>
</tr>
</tbody>
</table>
### Changing your password

You can change your password in Options.

1. Sign in to Webmail.
2. Go to Options by clicking this button.
3. On the General tab, click Change at Change password.
4. Enter the required information in the dialog box, and then click OK.
5. Click Save.

### Creating and sending email messages
Chapter 3: Using Webmail

To create and send a new message:
1) Click the downward arrow on the New button and then choose Message.
2) Write your message and enter recipients in the To: box.
3) Perform any of these tasks:
   - Format the message. More… (on page 21)
   - Add contacts from your address book. More… (on page 22)
   - Add the CC: and BCC: boxes. More… (on page 24)
   - Add attachments. More… (on page 25)
   - Set importance or priority. More… (on page 26)
   - Run spell check. More… (on page 27)
4) Click Send.

Formatting your email message

You can write a message in either of these formats:

- plain text—Plain text messages contain no formatting or styling. Messages sent in plain text can be read by any email application. You can view a message in plain text mode even if it contains formatting such as HTML.
- HTML—HTML lets your format your messages using fonts, numbering, bullets, color backgrounds, tables, and so on.

Note: A setting in Options determines the default format for composing messages. See General tab (on page 101).
To format your email message:

1. In the message window, click the downward arrow on the Options button, and then choose Format As HTML.

2. Use the tool bar to format your message.

Adding recipients in the To: box

Before sending an email message, enter recipients’ email addresses in the To: box.

If a recipient’s contact information already exists in your contact list or company global address list, you can use one of these methods to add it to the To: box:

- Find and add it from the appropriate address list.
- Type a partial name, such as the first name, last name, or partial email address, in the To: box and let Webmail resolve the name. More… (on page 23)
To add contacts from an address list:

1. In the message window, click To:.
2. Select an address list—your contact list or company global address list—in the Find names from drop-down list.
3. Type a partial name, such as the first name, last name, or partial email address, in the Search box, and then click Search.
4. Double-click the name to move it to the To: box, and then click OK.

About auto-completing addresses and resolving names

Auto-complete email addresses

As you type a name, a group name, or an email address in the To:, Cc:, or Bcc: box, Webmail checks for names from your contact list.

Resolve names

As you type a name, a distribution list, or an email address and click the Resolve Name button, Webmail checks for names from your contact list and global address list.

If there is only one valid address, it will be entered automatically in the To: box.

If there are multiple valid email addresses, a list of names appears. After you select a name, it will be entered in the To: box.
Chapter 3: Using Webmail

Removing recipients

To remove one name in the To: box:
Right-click the name, and then choose Remove.

To remove all the names in the To: box:
Right-click any name, and then choose Remove all.

Expanding a group or distribution list

A group or distribution list has a plus sign next to the name.

To show all the names in a group:
Right-click the group name, and then choose Expand.

Adding the CC: and BCC: boxes

You can add message recipients in the Cc: and Bcc: boxes in addition to the To: box.

- **Cc: (Carbon Copy)**—By adding a recipient’s name to this box in an email message, a copy of the message is sent to that recipient, and the recipient’s name is visible to other recipients of that message. The Cc: box shows by default.

- **Bcc: (Blind Carbon Copy)**—By adding a recipient’s name to this box in a mail message, a copy of the message is sent to that recipient, but the recipient’s name is invisible to other recipients of that message.
To add the Bcc: box:

In a message window, click the downward arrow on the Options button and then choose Show BCC Field.

Attaching a file to a message

You can attach files of any type to a message that you are creating.

To attach a file to a message:

1. In the message window, click Add Attachment.

2. Click Browse to add your file.
Setting importance for a message you are sending

You can assign a level of importance for an email message you are sending. The recipients can see the indicator in their inboxes without opening the message.

Setting the level of importance also allows recipients to sort messages by importance.

To set a level of importance for a message you are sending:

In the message window, click Importance and then choose High or Low.

Setting priority for message delivery

For an urgent message, you can set priority as "urgent" so the message will be sent at a faster speed.

Example. If you are sending a large message yet it is not time sensitive, you can set priority to "not urgent."

To set message priority:

1 In the message window, click the downward arrow on the Options button and then choose Options.
2 In the Priority drop-down list, select Urgent or Not Urgent, as appropriate.

![Message Options](image)

### Running spell check

The spell checker in Webmail allows you to:

- check the spelling based on Canadian, British, and American English
- make corrections before you close the spell checker
- revert a corrected word to the initial spelling

To run spell check for a message you are sending:

1 In the message window, click the downward arrow on the Spell Check button and then select the appropriate language.

![Spell Check Menu](image)
2 Click the **Spell Check** button to start checking spelling.

3 Make necessary changes.

<table>
<thead>
<tr>
<th></th>
<th>Click <strong>Resume editing</strong> to accept any changes you have made and to close the spell checker.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Click a highlighted word to make changes. You can:</td>
</tr>
<tr>
<td>3</td>
<td>HTML mode only. Edit directly on a word.</td>
</tr>
<tr>
<td>4</td>
<td>Plain text mode only. Click <strong>Edit</strong> to type a word in the text box. When you finish typing, click outside the text box for the edited word to take effect.</td>
</tr>
<tr>
<td>5</td>
<td>Choose a word from a list of suggestions.</td>
</tr>
<tr>
<td>6</td>
<td>An edited word appears highlighted in green. If you want to revert the word to its original spelling, click <strong>Initial: [word]</strong>.</td>
</tr>
</tbody>
</table>
Saving a draft

To save a draft of your email message, click Save Draft.

You can find drafts in the Drafts folder.

Viewing and receiving email messages
New messages arrive in your inbox. Unread messages appear in bold until you open them.

A folder name with a number in bold, such as **Inbox (2)**, indicates the total number of unread messages in a folder.

You can perform these tasks:

- Display email messages in text or HTML (on page 31)
- Check for new messages in your inbox (on page 32)
- Specify how often you want Webmail to check for new messages (on page 32)
- Mark messages as unread (on page 33)

**Note** You can move messages to another folder at any time. **More...** (on page 44)
Displaying email messages in text or HTML

You can specify on the Options page that all email messages display in plain text or HTML.

To display email messages in plain text or HTML:

1. Go to Options by clicking this button on the left navigation bar.

2. Click the Mail tab.
   - To view messages in HTML, select View mail as HTML (when possible).
   - To view messages in plain text, clear View mail as HTML (when possible):

3. Click Save.
Checking for new messages in your inbox

If you are anticipating new email messages, you can click Get Mail to check for new messages in your inbox.

Specifying the interval for checking new messages

You can specify how often Webmail checks for new messages. Follow these steps:

1. Go to Options by clicking this button on the left navigation bar.
2 On the Mail tab, enter the number of minutes at Polling interval (minutes after which to check for new mail).

3 Click Save.

Marking messages as unread

Webmail considers all opened messages as read, including messages displayed in the reading pane. Unread messages appear in bold. You can change the status of a message from read to unread.

To mark a message as unread:
Right-click a message and then choose Mark As Unread.

Putting all your unread messages in another folder is one way of organizing your messages. For details, see:
- Organizing email messages in your inbox (on page 39)
- Using folders to organize email messages (on page 44)
Chapter 3: Using Webmail

Replying to email messages

<table>
<thead>
<tr>
<th>Descriptions and Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>To reply to an email message:</strong></td>
</tr>
<tr>
<td>1) Select the email message you want to reply to.</td>
</tr>
<tr>
<td>2) Click the downward arrow on the Reply button, and choose one of these two options:</td>
</tr>
<tr>
<td>- <strong>Reply to Sender</strong>: Replies to the sender of the previous message. Any other addresses in the To: or Cc: boxes will be excluded.</td>
</tr>
<tr>
<td>- <strong>Reply to All</strong>: Replies to all recipients of the previous message.</td>
</tr>
<tr>
<td>3) After you finish writing your reply, click Send.</td>
</tr>
</tbody>
</table>

In Options, you can specify how you want to handle in your reply the text in original messages. For details, see *Mail tab* (on page 102), in *Editing your preferences* (on page 99).
Forwarding email messages

<table>
<thead>
<tr>
<th>Descriptions and tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>When you forward a message to someone else, the forwarded message includes all file attachments.</td>
</tr>
<tr>
<td><strong>To forward an email message:</strong></td>
</tr>
<tr>
<td>1) Select the email message you want to forward.</td>
</tr>
<tr>
<td>2) Click <strong>Forward</strong>.</td>
</tr>
<tr>
<td>3) Enter recipients in the <strong>To:</strong>, <strong>Cc:</strong> or <strong>Bcc:</strong> boxes.</td>
</tr>
<tr>
<td>4) Optional. Write a message.</td>
</tr>
<tr>
<td>5) Click <strong>Send</strong>.</td>
</tr>
</tbody>
</table>

In Options, you can specify how you want to handle text from the forwarded message. For details, see *Mail tab* (on page 102), in *Editing your preferences* (on page 99).

Accepting or declining meeting requests

Meeting requests arrive in your inbox. You can respond to a request in one of these ways:

- accept
- accept tentatively
- decline

If you are using the reading pane, the three options are available in the reading pane. If you are not using the reading pane, you must open the meeting request to see the options.

<table>
<thead>
<tr>
<th>Ways of responding to a meeting request</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Responding from your inbox</strong></td>
</tr>
<tr>
<td>To respond to the meeting request, click the appropriate button.</td>
</tr>
<tr>
<td>To customize a message to the meeting organizer, click the downward arrow on the appropriate button and then choose Edit Reply.</td>
</tr>
</tbody>
</table>

| **Responding from your calendar**      |
| As you receive a meeting request in your inbox, a meeting item is also created on your default calendar. You can right-click the meeting item on the calendar to accept or decline the request. |
Deleting email messages

Follow these steps:

Select the email message and then click the trash can button to move it to the Deleted Items folder.

Note: If you cannot delete a message in a public folder, you may not have the permission to do so. See Granting public folder permissions (on page 89).

Recovering email messages

Deleted messages reside in the Deleted Items folder. If you want to move a deleted message back to the original folder, follow these steps:

1. Go to the Deleted Items folder.
2. Right-click the message you want to recover and then choose Copy/Move.

3. Select a folder to which you want to move the message, and then click Move.

**Permanently deleting email messages**

Deleted messages reside in the Deleted Items folder.

To permanently delete one email message in the Deleted Items folder:

1. Open the Deleted Items folder.
2. Right-click the message, and then choose Delete.
3  Click Yes in the confirmation message.

To permanently delete all messages in the Deleted Items folder:

1  Right-click the Deleted Items folder and then choose Empty Deleted Items.

2  Click Yes in the confirmation message.

**Organizing email messages in your inbox**

Organizing all the emails you have received can be challenging. Webmail lets you view your email messages in different arrangements so that you can easily keep up with an ongoing email thread or find that important email.

By default, messages are displayed by date. The newest messages are displayed on the top of the message list.
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### Ways of organizing your inbox

#### Sort messages

You can sort messages by date, size, subject, attachment, who it is from, level of importance, and flag. More… (on page 40)

#### Flag and prioritize messages

You can add a flag to a message that needs follow-up. There are six colors for you to choose from; you determine the significance you want to assign for a specific color. More… (on page 43)

#### Assign a level of importance

You can mark a message with a level of importance so you can sort messages by importance. More... (on page 44)

---

### Sorting email messages

Sorting is a way to arrange your messages in ascending or descending order. You can sort messages by

- date
- size
subject
attachment
who it is from
level of importance
flag

To sort by a particular column:
Click the column title.
The column shows an arrow indicating whether the sort is in ascending order (upward arrow) or descending order (downward arrow).

Filtering email messages by date
In the reading pane, the header of a message displays the date in blue text. The right-click menu from the blue text provides the Email Messages command that allows you to filter email messages by that date.

To filter email messages by date:
1 Turn on the reading pane, if you have not done so.
   For details, see Using the reading pane (on page 49).
2 Select a message sent on the date.

3 In the reading pane, right-click the date in the message header, and then choose Email Messages.

The message list now displays only messages sent on that date.
Use flags to set priorities

You can add a flag to a message that needs follow-up. There are six colors for you to choose from; you determine the significance you want to assign for a specific color.

To add a flag:
Right-click the message and then choose Flag Color > a color of your choice.

To remove a flag:
Click one time on the flag.
Assigning a level of importance for a message you have received

You can mark a message with a level of importance. When you are looking for an important email message, you can sort messages by importance and quickly find that important message.

To assign a level of importance for a message you have received:
Right-click the message and choose Importance > a level (high or low).

To remove the importance mark for a message:
Right-click the message and choose Importance > Normal.

Using folders to organize email messages

Webmail uses system folders—Inbox, Sent Items, Drafts, Junk E-mail, Outbox, and Deleted Items—to categorize your email messages. More... (on page 45)

Here are other ways you can organize email messages by using folders:

- Create custom folders. More... (on page 46)
  Example. You create an "unread" folder and move unread messages to that folder.

- Move messages from one folder to another. More... (on page 47)
  Examples.
  - You move irrelevant messages from your inbox to the Junk E-mail folder. More about Junk E-mail folder... (on page 45)
  - After you have finished a task, you move a follow-up email message from a "to-do" folder to a "completed" folder.

- Rename a folder to suit your needs. More... (on page 48)
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- Delete a folder. *More...* (on page 48)

## About mail system folders

Mail system folders always display at the top of the folder list, followed by custom and public folders.

You cannot move, rename, or delete any of these system folders. However, you can copy a system folder and place it in a folder other than its parent folder; copying a system folder also copies all content inside that system folder.

<table>
<thead>
<tr>
<th>System folder</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inbox</strong></td>
<td>New email messages arrive in the Inbox folder. The Inbox folder opens upon your login.</td>
</tr>
</tbody>
</table>
| **Sent Items**| A copy of each message you have sent is saved in the Sent Items folder.  
**Note.** You can turn off this option in Options, on the **Mail** tab. *More...* (on page 99) |
| **Drafts**    | You can save messages that you wrote but did not send in the Drafts folder.  
**Note.** You can specify how often Webmail automatically saves drafts in Options, on the **Mail** tab. *More...* (on page 99) |
| **Junk E-mail**| Webmail filters unsolicited automated email messages, that is—spam or junk mail—before they reach your inbox. Messages that are possibly junk mail may be placed in your Junk E-mail folder.  
You can review those messages and then move or delete them. If you leave them in the Junk E-mail folder, they will be permanently deleted after a period of time specified by your Webmail administrator.  
To delete all junk email in the folder, right-click Junk E-mail and then choose **Empty Junk E-mail**.  
**Note.** If you are receiving a large number of unwanted mail messages, contact your Webmail administrator. Reporting spam helps your administrator to filter junk mail more effectively. |
| **Outbox**    | When you send an email message, it passes swiftly through the Outbox folder. You may not notice the message in the Outbox folder. |
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<table>
<thead>
<tr>
<th>System folder</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Deleted Items** | If you delete an email message, the deleted message goes to the Deleted Items folder and remains there until it is recovered or permanently deleted.  
For more information, see *Deleting email messages* (on page 37). |

### Creating a folder

Webmail allows you to create custom folders.

**Note:** You cannot use the following names and characters for your custom folders:
- Inbox, Sent Items, Drafts, Junk E-mail, Outbox, and Deleted Items (mail system folders)
- Calendar, Contacts, Notes, and Tasks (non-mail system folders)
- ; " / ! # $ % & * ( ) _ +

**To create a new folder:**

1. Right-click the title bar of the folders list and then choose New Folder.
2 Enter the name of the new folder and then select a destination folder.

![Create New Folder dialog](image)

To place the new folder on the same level as the system folders, ensure that you select the root folder, Folders.

3 Click OK.

**Moving messages between folders**

Follow these steps:

1 Select a message and then click this Copy/Move button.
   
   To select multiple messages, hold down the Ctrl key while selecting messages.

2 Select a destination folder and then click OK.
Renaming a custom folder

To rename a custom folder:
Right-click the folder and then choose Rename Folder.

Note: You cannot use the following names and characters for your custom folders:
- Inbox, Sent Items, Drafts, Junk E-mail, Outbox, and Deleted Items (mail system folders)
- Calendar, Contacts, Notes, and Tasks (non-mail system folders)
- ; " / ! # $ % ^ & * ( ) _ - +

Deleting a custom folder

To delete a custom folder:
Right-click the folder and then choose Delete.

Note. Messages in a deleted folder will be moved to the Deleted Items folder. In this folder, you can:
- recover any message. More… (on page 37)
- permanently delete any message. More… (on page 38)
Changing how information displays in a message list

These are ways to control how and how much information displays in a message list:

- Position the reading pane. More… (on page 49)
- Remove or restore columns. More… (on page 50)
- Move or resize columns. More… (on page 51)

Using the reading pane

By using the reading pane, you can view messages without opening them.

How it works
Select the message to show the content in the reading pane.
In the reading pane, you can do everything you expect to do with an open message, such as opening attachments, replying messages, and responding to meeting requests.

To turn on the reading pane:
Click View, and then choose Reading Pane > Bottom or Right

To turn off the reading pane:
Click View, and then choose Reading Pane > Off
Removing or restoring columns

You can control the amount of detail for messages by removing or restoring columns.

Ways to control the view of a message list

Webmail uses columns to show these details about each message:
- flags
- importance
- the sender
- subject
- size
- when it was received
- attachments

To remove a column:
Right-click any column and choose the column that you want to remove.

To restore a column:
Right-click any column and choose the column that you want to restore.
Moving or resizing columns

You can control the amount of detail for messages by moving or resizing columns.

### Ways to control the view of a message list

<table>
<thead>
<tr>
<th>From</th>
<th>Subject</th>
<th>Folder</th>
<th>Size</th>
<th>Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adrienne Slaugh</td>
<td>U1 mockups</td>
<td>Inbox</td>
<td>18 KB</td>
<td>3:45 PM</td>
</tr>
<tr>
<td>Rebecca Cox</td>
<td>Our meeting</td>
<td>Inbox</td>
<td>21 KB</td>
<td>Mar 20</td>
</tr>
<tr>
<td>Felicia Wu</td>
<td>project 2000</td>
<td>Inbox</td>
<td>8 KB</td>
<td>Mar 20</td>
</tr>
<tr>
<td>Jason Tsai (jatsi)</td>
<td>RE: project 2000</td>
<td>Inbox</td>
<td>9 KB</td>
<td>Mar 20</td>
</tr>
<tr>
<td>Jason Tsai (jatsi)</td>
<td>project 2000</td>
<td>Inbox</td>
<td>8 KB</td>
<td>Mar 20</td>
</tr>
<tr>
<td>Felicia Wu</td>
<td>Re: test</td>
<td>Inbox</td>
<td>8 KB</td>
<td>Mar 18</td>
</tr>
<tr>
<td>Yuri Teste2fmx</td>
<td>Re: Server will</td>
<td>Inbox</td>
<td>6 KB</td>
<td>Feb 17</td>
</tr>
</tbody>
</table>

Webmail uses columns to show these details about each message:

- flags
- importance
- the sender
- subject
- size
- when it was received
- attachments

**To move a column:**
Drag the column heading and drop it over the column heading next to which you want the column to appear.

**To resize a column:**
1) Hover your mouse over the border of two column headings.
2) When a two-way arrow appears, drag your mouse until you see the desired width of the column and then release the mouse button.
Managing contacts

Webmail supports two types of contact lists:

- **Contact list**—You can create contacts and distribution lists and manage them in your contact list. No other user can have access to this contact list. See also *Creating a contact* (on page 54), *Creating a distribution list* (on page 57), and *Importing contacts* (on page 59).

Your Webmail administrator can set a limit for the maximum number of entries you can have in your contact list. When you reach this maximum, you cannot add any more contacts. However, you can delete unused contacts to free up space.

- **Global Address List (GAL)**—The corporate directory is available to all users within your organization.

You cannot edit GAL entries. However, if an email address from the GAL has appeared in an email message you have sent or received, you can add it to your other contact list and then edit the information, if necessary. See *Creating a contact* from an email message you receive.
Create additional contact folders

By default, Webmail provides one contact folder. You can create additional ones to suit your needs.

To create a contact folder:

1. Go to Contacts by clicking this button on the left navigation bar.

2. Right-click the title bar My Contacts and then choose New Contact Folder.

3. Enter a name and then click OK.
Creating contacts

After you create a contact, it appears in your contact list. Only you can view and edit the contacts in the list.

You can also view each contact on a detailed card. More... (on page 55)

To create a contact:

1. Click the downward arrow on the New button, and then choose Contact.

2. Enter the contact information on the form.

By default, the contact will be displayed by the last, first, and middle name.
If you want to change the display or order, select an appropriate option in the File As drop-down list.
3 Click Save.

**Viewing contacts on detailed cards**

You can view contacts on detailed cards. Each detailed card shows the information you entered for the contact.

To view detailed cards:
1) Go to Contacts.
2) Click View > Detailed Cards.

---

**Creating a contact from an email message you receive**

If an email message you receive contains a name you want to add to your contact list, you can do so from the email message.

1 Right-click the name you want to add and then choose Add To Contacts.

2 Optional. Enter more or edit information on the form.

3 Click Save.
Moving contacts or distribution lists between folders

1. Find the contact or distribution list.
   For help in quickly finding a contact, no matter which folder you are currently viewing, see Searching by words or phrases (on page 118).

2. Right-click the contact or distribution list and then choose Copy/Move.

3. In the dialog box, select the contact folder to which you want to move the contact or distribution list and then click Move.

Editing a contact or distribution list

1. Find the contact or distribution list.
   For help in quickly finding a contact, no matter which folder you are currently viewing, see Searching by words or phrases (on page 118).

2. Right-click the contact or distribution and then choose Edit Contact (for contacts) or Edit (for distribution list).

3. Make changes on the form and then click Save.

Deleting a contact or distribution list

1. Find the contact or distribution list.
   For help in quickly finding a contact, no matter which folder you are currently viewing, see Searching by words or phrases (on page 118).

2. Right-click the contact or distribution list and then choose Delete.

Note: A deleted contact or distribution list no longer displays in the contact list. The information is not available for the address auto-completion or for the address search dialog box, which you can see from clicking the To: box in a message window.
Creating distribution lists

A distribution list allows you to send messages to a group of people, without having to enter email addresses one by one.

Example. You regularly send messages to four colleagues at the human resources department. You can create a distribution list called "HR;" the list contains the names and email addresses of the members in the list. If you send an email message to this distribution list, all members in this list receive the message. A member can also expand the list to see all the members.

To create a distribution list:

1. Click the downward arrow on the New button and then choose Personal Distribution List.
Enter the required information.

1. Enter the name of the distribution list.
2. Select the contact folder to which you want to save the distribution list.
3. Click **Select Members** to add names that already exist in your contact list or organization's global address list.
4. Click **Add New** to add names that do not already exist in your contact list or organization's global address list.
   - When the dialog box appears, enter the name you want to display in the **To:** box and the email address.
5. Clicking **Save** saves the distribution list in the contact folder you selected.
Importing contacts

Webmail allows you to import contacts from a CSV (comma-separated values) file.

Example. You can export contacts from a Hotmail or Yahoo! email account to a CSV file and then import the file to a contact folder in Webmail. For help in exporting contacts from another email service provider, consult the service documentation.

To import contacts:

1. Go to Options by clicking this button on the left navigation bar.
2 On the Contacts tab, click Browse to select the CSV file that contains the contacts, and then click Import.

3 Select the folder to which you want to import the contacts, and then click OK.
Managing your calendars

Webmail lets you track and schedule appointments, meetings, and all-day events using calendars. See also *Scheduling an activity on the calendar* (on page 70).

**What it is**

Calendar in Webmail holds all the calendars that you create and that other people share with you.

**How to go to Calendar:**

Click this button on the left navigation bar.

---

**Create and manage calendars**

- You can create additional calendars, in addition to the default calendar. *More…* (on page 62)
- Choose a view for your calendars. *More…* (on page 65)
- View calendars side by side. *More…* (on page 66)
- Open a shared calendar. *More…* (on page 67)
- Share a calendar with others in your global address list. *More…* (on page 67)
Creating additional calendars

In addition to the default calendar, you can create custom calendars. For example, you can create a calendar for work, personal appointments, and company activities.

You can edit a calendar you create in these ways:
- Assign a color More… (on page 62)
- Rename More… (on page 64)
- Delete More… (on page 64)

To create an additional calendar:
1) From any folder, click the downward arrow on the New button and then choose Calendar.
2) Enter the name for the new calendar and then click OK.

The new calendar appears in Calendar.

Assigning a color for a calendar
Description and task

**What it is**
You can color-code your calendars so you can easily identify activities from different calendars.

Eight colors are available. You can use each color more than once.

**To assign a color for a calendar:**

1) Go to Calendar.
2) Right-click the calendar and then choose **Properties**.
3) Select a color in the Color drop-down list and then click **OK**.
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Renaming a calendar

To rename a calendar:
1) Right-click the calendar and then choose Rename Folder.
2) Enter the new name and then click OK.

Including or excluding a calendar

To include a calendar in all the views:
Select the check box next to the calendar name.

To exclude a calendar from all the views:
Clear the check box next to the calendar name.
For details about views, see Choosing a way to view your calendars (on page 65).

Deleting a calendar

You can delete any calendar in your Calendar folder, except your default calendar.

To do so, right-click the calendar and then choose Delete.

Note. The meetings that were scheduled on a deleted calendar will not be automatically removed from invited attendees' calendars.
Choosing a way to view your calendars

Description and tasks

You can choose a view that displays:

- **Day**—activities of the day. Use the arrows to view the previous or next days.
- **Work Week**—activities for Monday through Friday of the week. Use the arrows to view the previous or next weeks.
- **Week**—activities for seven days of the week. On the Options page, you can select which day is the first day of the week.
- **Month**—activities of the month. Use the arrows to view the previous or next months.
- **Schedule**—activities of the day. If you have different calendars, this view displays them side by side. Use the arrows to view the previous or next days. More… (on page 66)

To choose a view for your calendars:

1) Go to Calendar.
2) Click **View** and then choose the view.
## Viewing calendars side by side

<table>
<thead>
<tr>
<th>Description and tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you have several calendars, you can view them side by side.</td>
</tr>
</tbody>
</table>

### How the view displays your calendars

1. Each calendar displays in one column.
2. The **All** column is a color-coded, free/busy indicator for the displayed calendars. White color means that no activity is scheduled at that time. As more calendars have activities scheduled at the same time, the color becomes deeper. When the color is deep red, it means that most calendars have an activity during that time.

You can hover your mouse over a time slot in the **All** column to see which calendars have activities scheduled for that time.

### To view calendars side by side:

1. Go to Calendar.
2. Select all calendars that you want to view.
   - For more information, see *Including or excluding a calendar* (on page 64).
3. Click **View > Schedule**.
Chapter 3: Using Webmail

Opening a shared calendar

To open a shared calendar:

1) From any folder, click the downward arrow on the New button and then choose Calendar.
2) Select Open a shared calendar.
3) Use one of these methods to enter the email address of the contact that has shared his or her calendar with you:
   - Type the email address in the text box.
   - Click Select Address to find the contact in the address book dialog box.
4) Click OK.

Sharing your default calendar
You can share your default calendar with one or more users in your organization's global address book. By sharing your calendar, you allow someone to manage this calendar on your behalf.

Depending on the permissions, the person with whom you share your calendar can create, read, modify, and delete all items and files in your calendar or simply view your calendar and free/busy period.

More… (on page 69)

**Note.** You can share only your default calendar. Any other calendar you create cannot be shared.

**To share your default calendar:**

1) Go to Calendar.
2) Right-click the calendar and then choose Properties.
3) Click Share.
4) In the Permissions dialog box, click Add.
5) Find the name of the person with whom you want to share the calendar.

You can share your calendar only with users in your global address list. Contacts (external users), distribution lists, mail-enabled public folders as well as your personal contact lists are unavailable.

6) Select a permission level in the Permission Level drop-down list.

For descriptions of each permission level, see *About the permission levels* (on page 69).

7) Click OK.

The calendar is shared and displayed in your name.
About the permission levels

As you select a permission level in the drop-down list, appropriate privileges are automatically selected. If you select or clear additional check boxes, the permission level changes accordingly.

<table>
<thead>
<tr>
<th>With this permission level</th>
<th>You can</th>
</tr>
</thead>
</table>
| Owner                     | ▪ Create, read, modify, and delete items  
▪ Create sub-folders  
▪ Grant permissions to other users |
| Publishing Editor         | ▪ Create, read, modify, and delete items  
▪ Create sub-folders |
| Editor                    | Create, read, modify, and delete items |
| Publishing Author         | ▪ Create and read items  
▪ Create sub-folders  
▪ Modify and delete items you create |
| Author                    | ▪ Create and read items  
▪ Modify and delete items you create |
| Nonediting Author         | ▪ Create and read items  
▪ Delete items you create (Cannot modify any items) |
<table>
<thead>
<tr>
<th>With this permission level</th>
<th>You can</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reviewer</strong></td>
<td>Read items</td>
</tr>
<tr>
<td><strong>Contributor</strong></td>
<td>▪ View folders</td>
</tr>
<tr>
<td></td>
<td>▪ Create items (Cannot read, modify, or delete any items)</td>
</tr>
<tr>
<td><strong>None</strong></td>
<td>You cannot open the folder.</td>
</tr>
<tr>
<td></td>
<td>This option temporarily disables access to the original owner's folder without revoking the granted privileges.</td>
</tr>
<tr>
<td><strong>Custom</strong></td>
<td>Perform tasks defined by the folder owner</td>
</tr>
</tbody>
</table>

**Scheduling activities on your calendar**

You can schedule these three types of activities on the calendar:

- **Appointments**—Activities without attendees. When you schedule an appointment, no email message is sent to confirm the appointment. You can use the QuickAdd tool to quickly create an appointment. *More…* (on page 80)

- **Meetings**—Activities that include attendees. When scheduling a meeting, you select attendees and send an invitation email message to them. You can reschedule and set up recurring meetings.

- **All-day events**—Activities that last all day. All-day events appear as banners at the top of the calendar. You can use the QuickAdd tool to quickly create an all-day event. *More…* (on page 80)
No matter which folder you are viewing within Webmail, the scheduling options are just a couple of clicks away. Use any of these methods to schedule an activity on your calendar:

**Ways of scheduling an activity**

On the toolbar from any folder or view, click the downward arrow on the **New** button and then choose **Appointment**.

Right-click a date on the mini-calendar and choose **New Appointment** or **New All Day Event**.

For more information about the mini-calendar, see *Using the mini-calendar* (on page 79).

If you are reading an email message in the reading pane, text such as "today," "tomorrow," and exact dates is highlighted in the message header. Right-click the highlighted date and then choose **New Appointment**.

You can also:

- hover your mouse over a highlighted date to see if an appointment is scheduled for that date.
- click a highlighted date to open the calendar.
Ways of scheduling an activity

Go to Calendar. Double-click anywhere on the calendar that you want to use to schedule an activity.

Review the topic About the appointment details page (on page 72) to learn how to add details for the activity you want to schedule.

About the appointment details page

See Scheduling an activity on your calendar (on page 70) to learn different ways of accessing the appointment details page.

This page allows you to schedule single or recurring appointments, meetings, and all-day events. You can enter detailed information about the activity on these three tabs:

- **Appointment Details**—Lets you specify the subject, starting and ending times, free/busy status, time zone, recurrence pattern, and so on. More… (on page 74)
- **Schedule**—Lets you check each attendee's free/busy status. More… (on page 77)
- **Find Attendees**—Lets you find attendees from your contact list and global address list. More… (on page 78)
When you finish entering details about the activity, click **Save**. If you are scheduling a meeting, clicking **Save** sends an invitation email message to attendees.
Appointment Details tab

Review the following sections—Activity details and Activity message—to learn what you can do with each option on the Appointment Details tab.

Activity details

Enter the name of the activity at Subject.

You can also enter the location of the activity. The location information will be visible on attendees' calendars, if there is any attendee, as well as on your calendar.

The Show as information indicates your availability during the time this activity takes place. You can select one of these:

- **Free**
- **Tentative**
- ** Busy**
- **Out of Office**

The availability information you select is visible to other Webmail users when they look up attendees' availability on the Schedule tab on the appointment details page. More… (on page 77)

If you have more than one calendar, select an appropriate calendar in the drop-down list.

If this is an all-day event, select the check box.

The meeting item will appear as a banner on top of attendees' calendars as well as your calendar.

**Note.** The list of time zones becomes unavailable if you select All-day event.

**Tip.** If you want to indicate to people viewing your schedule that you are out of the office, instead of free, select Out of Office in the Show as drop-down list.

Select an appropriate time zone in the drop-down list.
If you are in one time zone and you send invitation email messages to attendees in different time zones, the meeting item is displayed at a different local time on each person’s calendar.

**Example.** You are in the Pacific time zone in the U.S. and send a meeting request that starts at 11 a.m. PST to an attendee in the Eastern time zone, the attendee will see that the meeting starts at 2 p.m.

**Note.** The list of time zones becomes unavailable if you select *All-day event.*
Select the date and starting and ending times for the activity.

You can select one of these recurrence patterns:

- **None**—Single occurrence
- **Every Day**—Click the **Customize** link to further specify the pattern.
- **Every Week**—Click the **Customize** link to further specify the pattern.
- **Every Month**—Click the **Customize** link to further specify the pattern.
- **Every Year**—Click the **Customize** link to further specify the pattern.
- **Custom**—Lets you further specify the pattern.

You can select **Remind** and specify how early you want a reminder to appear on each attendee’s screen.

Enter attendees’ names or email addresses.

To find a name in your contact list or global address list, click **Attendees**. For details, see *Find Attendees tab* (on page 78).

**Activity message**

You can type a message in this text area.
You can select either the HTML or Plain text format.
For more information, see Formatting your email message (on page 21).

You can spell check the message you create.
For more information, see Running spell check (on page 27).

You can add attachments for the activity.
For more information, see Attaching a file to a message (on page 25).

**Schedule tab (Checking an attendee's availability)**

When scheduling a meeting using the appointment details page, you can check each attendee's availability on the Schedule tab.

As you enter an attendee's name or email address, the attendee's availability displays. The Key section lists each free/busy status—Free, Busy, Tentative, Unknown, and Out of Office—represented by a different color.

---

**Note:** These limitations for the free/busy status apply to all meetings, appointments, and all-day events, including recurring ones:

- **Future activities:** The free/busy status is shown for any days remaining in the current calendar month and for all days in the upcoming calendar month.
  
  **Example.** If today's date is March 15, the free/busy status will be shown for March 15 to March 31 and for April 1 to April 30.

- **Past activities:** The free/busy status is shown for the days that have elapsed in the current calendar month.
  
  **Example.** If today's date is March 15, the free/busy status will be shown for March 1 to March 15. The free/busy status for the previous month, February in this example, is unavailable.
Find Attendees tab

When scheduling a meeting, you can look up names from your contact list and global address list on the Find Attendees tab.

The attendees you added from this tab will also appear on the Appointment Details tab.

1. Type all or partial text of the attendee name or email address in the Find box.
2. Select an address list in the Source drop-down list.
3. Click Search.

Search results appear in this area.

To add a name, select it and then click Add.
To add all the names in the search results, click Add All.
## Using the mini-calendar

<table>
<thead>
<tr>
<th>Description and tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regardless of which folder you are viewing, the mini-calendar can always display and give you the convenience to perform these tasks:</td>
</tr>
<tr>
<td>▪ View a calendar. Click the appropriate arrows to view previous or next months or years.</td>
</tr>
<tr>
<td>▪ Open the Calendar folder by clicking any date.</td>
</tr>
<tr>
<td>▪ Accessing the appointment details page to schedule an activity by right-clicking a date.</td>
</tr>
<tr>
<td>See also:</td>
</tr>
<tr>
<td>▪ [Scheduling an activity on your calendar](on page 70)</td>
</tr>
<tr>
<td>▪ [About the appointment details page](on page 72)</td>
</tr>
</tbody>
</table>

### To turn on or off the mini-calendar:

1) Go to Options. For details about Options, see [Editing your preferences](on page 99).

2) On the Calendar tab, select or clear *Always show the mini-calendar*, as appropriate.

3) Click **Save**.
Using QuickAdd to create an appointment
Chapter 3: Using Webmail

Description and tasks

The QuickAdd dialog box lets you create an appointment or all-day event without having to use the appointment details page.

To access this dialog box:
1) Right-click one of these places:
   - your calendar
   - a date on the mini-calendar
   - a highlighted date in an email message header in the reading pane
2) On the menu that appears, choose New Appointment or New All-Day Event, as appropriate.

If you need to enter more details such as selecting a time zone, specifying your free/busy status, or inviting attendees, click More Details in the dialog box. The Appointment Details page then appears. For more information, see About the appointment details page (on page 72).

If you want to always display the QuickAdd dialog box, you must turn on this option.

To turn on or off the QuickAdd dialog box:
1) Go to Options.
   For details about Options, see Editing your preferences (on page 99).
2) On the Calendar tab, select Use the QuickAdd dialog when creating new appointments.
Turning messages into meeting requests

You can turn an email message into a meeting request by dragging and dropping the message to a date on the mini-calendar.

As a result, these boxes on the appointment details page are automatically populated with information in the message:

- **Subject**: filled with the subject of the message
- **Attendees**: filled with the names or email addresses in the To: and Cc: boxes in the message
- **Text area**: filled with text in the message. Attachments are not transferred to the meeting request.

The date on the mini-calendar to which you drag and drop the message also reflects on the appointment details page.

To turn an email message to a meeting request:

1. Select the message in the message list.
2. Drag and drop the message to a date on the mini-calendar.
3. Edit the information on the appointment details page, if necessary.
   For help in completing this task, see *About the appointment details page* (on page 72).
4. Click Save to send the meeting request.
Using notes

Overview and tasks

Notes is an electronic note book in which you can write down your thoughts, questions, reminders, or anything else.

You can:

- create notes. More… (on page 84)
- edit notes. More… (on page 85)
- assign a color for a note. More… (on page 86)
- create additional note folders. More… (on page 86)
Creating a note

Follow these steps:

1. Click the downward arrow on the New button and then choose Notes.

2. Type your note in the text box and then click Save.
Editing a note

Follow these steps:

1. On the left navigation bar, click this button.

2. Select the note and then click Open.

3. Edit your note and then click Save.
Assigning a color for a note

Follow these steps:

1. On the left navigation bar, click this button.

2. Right-click the note and then choose Color > a color of your choice.

Creating a note folder

Follow these steps:

1. On the left navigation bar, click this button.
2  Right-click the title bar Note Folders and then choose New Folder.

3  Enter a name for the new folder, select the destination folder, and then click OK.

Using public folders

| Overview and tasks |
Public folders provide an efficient way of collecting, organizing, and sharing information in your organization.

For example, user groups or project teams can use public folders to:

- share email messages
- keep track of meetings and events in a calendar
- share a contact list to make certain names, addresses, and phone numbers available to the group

The owner of a public folder determines how other people can access and use that folder.

Things you can do with a public folder include:

- View a public folder.
- Create a public folder. More… (on page 89)
- Grant permissions so other users can use a public folder. More… (on page 89)
- Post information, such as files, messages, contacts, and meetings, in a public folder. More… (on page 90)

To view public folders:

Click this button on the left navigation bar.
Creating a public folder

After your administrator has granted you the appropriate permission, you can create public folders.

To create a public folder:

1. Go to Public Folders.
2. Right-click All Public Folders and then choose New Folder.
3. Complete these steps in the Create New Folder dialog box:
   - Enter a name for the public folder.
   - Select the type of content in the drop-down list. For details, see About the content types (on page 89).
   - Select a destination folder.
4. Click OK.

About the content types

You can create three types of public folders according to the type of information people can post in the folder:

- **Mail and Post Items**—Folder contains messages and files
- **Calendar Items**—Folder contains a calendar so group members can keep track of meetings, events, or project deadlines that affect a group
- **Contact Items**—Folder contains a contact list that makes contacts or distribution lists available to a group

Granting permissions for using a public folder
Chapter 3: Using Webmail

Before you grant other people permission to use a public folder, you must have Owner permission for the folder.

As the owner of a public folder, you can grant different permissions to different users. More… (on page 69)

To grant permissions for using a public folder:

1) Go to Public Folders.
2) Right-click the specific folder and then choose Properties.
3) Click Share… in the Folder Properties dialog box.
4) In the Permissions dialog box, click Add.
5) Find the name of the person to whom you want to grant permission, and then click OK.
   You can grant permission to only contacts in your global address list. Your personal contact lists are unavailable.
6) Select a permission level in the Permission Level drop-down list.
   For descriptions of each permission level, see About the permission levels (on page 69).

Posting information in a public folder

If you have the appropriate privileges, you can post these information in a public folder:

- messages and files. More… (on page 91)
calendar items, such as meetings, all-day events, and appointments. More… (on page 92)

contacts and distribution lists. More… (on page 93)

**Posting a message or a file in a public folder**

You can post a message or file only in a *Mail and Post Items* public folder. For details, see *About the content types* (on page 89).

**To post a message or a file in a public folder:**

1. Go to Public Folders.
2. Select the specific public folder and then click New.

3. Enter a subject in the **Subject** text box.

4. Follow these steps, depending on what you want to do:
   - To post a message: Write your message in the text area.
   - To post a file: Click **Add Attachment**. Then select the file you want to post by clicking **Browse**.

   To review the tasks you can do when creating a message, see *Creating and sending a new email message* (on page 20).

5. Click Post.
**Posting a calendar item in a public folder**

You can post a calendar item only in a *Calendar Items* public folder. For details, see *About the content types* (on page 89).

**To post a calendar item in a public folder:**

1. Go to Public Folders.
2. Select the specific public folder and then click **New**.
3. Enter details about the meeting, all-day event, or appointment you want to schedule.
   
   For help in completing this task, see *About the appointment details page* (on page 72).
4. Click **Save**.
Posting a contact or distribution list in a public folder

You can post a contact or distribution list only in a Contact Items public folder. For details, see About the content types (on page 89).

To post a contact or distribution list in a public folder:

1. Go to Public Folders.
2. Select the specific public folder and then follow these steps, depending on what you want to do:

   **To post a contact:**
   - Click the downward arrow on the New button and then choose Contact.
   - For help in completing this task, see Creating contacts (on page 54).

   **To post a distribution list:**
   - Click the downward arrow on the New button and then choose Personal Distribution List.
   - For help in completing this task, see Creating distribution lists (on page 57).

Using tasks

A task is an assignment you want to track through completion. For example, you can create a task for sending a status report to your manager by Friday. See Creating a task (on page 94).

Besides creating your own tasks, you can assign tasks to others. You can do so by sending a task request to someone. The person then becomes the owner of the task unless he or she rejects the request. See Assigning a task (on page 95) and Accepting or declining a task request (on page 97).
Creating a task

Follow these steps:

To create a task:

1. Click this button on the left navigation bar; then click New on the Tasks page.

2. Enter the task name in the Subject text box.

3. Set a start date and due date for the task, if appropriate.

4. Enter all the other information as appropriate.

5. Click Save.

The task appears in your task list.
Assigning a task

The person to whom you assign a task is the owner of the task. Only the owner of a task can edit the task, update the progress, and mark it as completed.

As the creator of the task, you can choose to let Webmail:

- update a copy of the task in your task list each time the owner updates it.
- send you a status report by email when the owner completes it.

To assign a task:

1. Click this button on the left navigation bar; then click New on the Tasks page.
Chapter 3: Using Webmail

2 Enter the task name in the Subject text box.
3 Set a start date and due date for the task, if appropriate.
4 Enter all the other information as appropriate.
5 Click Assign To.
6 Enter a contact in the Assign To box.

Click Assign To to find a contact in your contact list or global address list.

7 Select one or both of these options:
   - Keep an updated copy of this task on my task list—Webmail keeps a copy of the task in your task list and updates it every time the task owner updates it.
   - Send me a status report when the task is completed—Webmail sends you a status report by email when the task owner completes it.

You also receive an email message when the task owner updates the task.

8 Click Send.

The task appears on both your and the person’s task lists.
Accepting or declining a task request

If you have been assigned a task, you become the owner of the task unless you reject it. You can edit the task, update the progress, and mark it as completed.

A task request arrives in your inbox.

If you are using the reading pane, select the task request in the inbox and then click Accept or Decline, as appropriate.

If you are not using the reading pane:

1. Open the task request in your inbox.
2. Click Accept or Decline, as appropriate.

Marking a task as completed

You can mark a task as completed on your task list without opening the task.

To mark a task as completed:

1. Click this button on the left navigation bar.
Chapter 3: Using Webmail

2. Ensure that the Task folder is in the Simple List view.

To select the Simple List view:
Click View and then choose Simple List.

3. Select the check box next to the completed task.
Editing your preferences

You can edit your user preferences on the Options page.

**How to access this page**

Click this button on the left navigation bar.
When you finish making changes on the Options page, click Save.

**What you can do on this page**

You can change user preferences for email messages, contacts, calendars, notes, tasks, and rules.

**Options on this page**

*General tab* (on page 101)

*Mail tab* (on page 102)

*Contacts tab* (on page 105)

*Calendar tab* (on page 105)
Setting up an out-of-the-office message

By setting up an out-of-the-office message, you can automatically reply to incoming email messages while you are away.

You can also set up rules to manage incoming messages. For details, see Managing messages with rules (on page 107).

To set up an out-of-the-office message:

1. Go to Options by clicking this button on the left navigation bar.
2 Click the Mail tab.

3 Select Away message enabled and then type the message you want to send to the people who send you messages while you are away.

4 Click Save.

**General tab**

<table>
<thead>
<tr>
<th>Options</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>About PostPath Webmail</td>
<td>Lets you see the version of Webmail by clicking <strong>Show</strong></td>
</tr>
<tr>
<td><strong>Default editor</strong></td>
<td>Lets you select the default format for the messages you compose</td>
</tr>
<tr>
<td></td>
<td><strong>Note.</strong> The option <strong>Reply/Forward using the original message format</strong> on the <strong>Mail</strong> tab supersedes this option. For example, if you select Text as your default editor, but the message you are replying to contains HTML format, you will compose your reply in HTML.</td>
</tr>
<tr>
<td>Change password</td>
<td>Lets you change your login password by clicking <strong>Change</strong></td>
</tr>
<tr>
<td><strong>UI theme</strong></td>
<td>Lets you change the color scheme of Webmail</td>
</tr>
<tr>
<td></td>
<td>Select a color in the drop-down list.</td>
</tr>
<tr>
<td><strong>Spell Check Dictionary</strong></td>
<td>Lets you select the language that the spell check dictionary uses to search for typographical errors</td>
</tr>
<tr>
<td><strong>Restore Defaults</strong></td>
<td>Lets you restore the default options</td>
</tr>
</tbody>
</table>
### Mail tab

<table>
<thead>
<tr>
<th>Options</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reading Pane</strong></td>
<td>The reading pane lets you display the content of a message without having to open it. You can select one of these reading pane positions:</td>
</tr>
<tr>
<td></td>
<td><strong>Off</strong>—No reading pane</td>
</tr>
<tr>
<td></td>
<td><strong>Bottom</strong>—The reading pane appears on the bottom of the message list.</td>
</tr>
<tr>
<td></td>
<td><strong>Right</strong>—The reading pane appears to the right of the message list.</td>
</tr>
<tr>
<td></td>
<td><strong>Note.</strong> The selection you make in Options applies to all messages. However, if you select a different reading pane position, say in your inbox, this supersedes the selection in Options. For details, see <em>Using the reading pane</em> (on page 49).</td>
</tr>
<tr>
<td><strong>Number of items to display per page</strong></td>
<td>Lets you select how many items you want to display per page</td>
</tr>
<tr>
<td><strong>Show fragments in message lists</strong></td>
<td>Displays fragments of each message, in addition to the subject, in the Subject column. This option gives you more information of each message when you view the message list.</td>
</tr>
<tr>
<td><strong>Polling interval (minutes after which to check for new mail)</strong></td>
<td>Lets you specify how often you want Webmail to check for new email messages An interval must be between 2 and 25 minutes. You do not need to type the word &quot;minute&quot; in the text box.</td>
</tr>
<tr>
<td><strong>Save copies of messages to Sent Items folder</strong></td>
<td>Lets you save a copy of every message you send in the Sent Items folder</td>
</tr>
<tr>
<td><strong>Auto save draft interval (minutes)</strong></td>
<td>Lets you specify how often you want Webmail to save your email drafts to the Drafts folder An interval must be between 2 and 60 minutes. You do not need to type the word &quot;minute&quot; in the text box.</td>
</tr>
<tr>
<td><strong>Reply-to address</strong></td>
<td>Lets you specify an email address to which message replies are sent The default is your Webmail email address.</td>
</tr>
</tbody>
</table>
### Options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Reply/Forward using the original message format** | Selecting the check box lets you compose your reply in the same format—plain text or HTML—as the original message.  
**Note.** This option supersedes the option Default editor on the General tab. For example, if you select Text as your default editor, but the message you are replying to contains HTML format, you will compose your reply in HTML. |
| **Reply includes attachments** | Lets you include attachments from the original message in your reply |
| **Reply includes original text** | Lets you specify whether and how original text will be included in your reply:  
**Don’t include**—Original text won’t be included.  
**As an attachment**—All original text and attachments will be included in one attachment when recipients receive your reply.  
**In the body**—All original text will be included with no prefixes.  
**In the body with a prefix**—All original text will be included with > or |, depending on which prefix you choose. See the Prefix each included line with option for details.  
**Include last message only**—Only the last message in the message thread will be included, with a prefix, if you select one. |
| **Forward includes original text** | Lets you specify how original text will be included in your forwarded message:  
**As an attachment**—The forwarded text and attachments will be included in one attachment when recipients receive your forwarded message.  
**In the body**—All original text and attachments will be included with no prefixes.  
**In the body with a prefix**—All original text and attachments will be included with > or |, depending on which prefix you choose. See the Prefix each included line with option for details. |
| **Prefix each included line with** | Lets you select one of these prefixes for each line of the original text in your reply and forwarded messages:  
>  
|  
| **Add signature to all outgoing messages** | Automatically adds a signature to all messages you send  
**Note.** You can create a signature yet leave the option turned off. When you compose a message, you have the option of |
**Chapter 3: Using Webmail**

<table>
<thead>
<tr>
<th>Options</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Place signature at the bottom of the entire message</strong></td>
<td>Automatically adds a signature at the bottom of an entire message, that is—the signature will be added below all the original text in replies and forwarded messages. <strong>Note.</strong> You can create a signature yet leave the option turned off. When you compose a message, you have the option of adding the signature to your message.</td>
</tr>
<tr>
<td><strong>Signature</strong></td>
<td>In the text box, enter the signature you want to add. <strong>Note.</strong> You can create a signature yet leave the option turned off. When you compose a message, you have the option of adding the signature to your message.</td>
</tr>
<tr>
<td><strong>Away message Enabled</strong></td>
<td>Automatically sends an out-of-the-office message to incoming email messages when you are out of the office.</td>
</tr>
<tr>
<td><strong>Away message</strong></td>
<td>In the text box, type the out-of-the-office message.</td>
</tr>
<tr>
<td><strong>View mail as HTML (when possible)</strong></td>
<td>Lets you set the default format—HTML or plain text—when you view email messages.</td>
</tr>
<tr>
<td><strong>Always compose in new window</strong></td>
<td>Opens a new message window, separate from your Webmail window, when you compose a message.</td>
</tr>
<tr>
<td><strong>Show external images</strong></td>
<td>Displays all external images such as logos, clip art, and photos in messages. If the option is not selected, such images appear as text only.</td>
</tr>
<tr>
<td><strong>Restore Defaults</strong></td>
<td>Lets you restore the default options.</td>
</tr>
</tbody>
</table>
## Contacts tab

<table>
<thead>
<tr>
<th>Options</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default contact view</td>
<td>Lets you choose to view your contact list in:</td>
</tr>
<tr>
<td></td>
<td>• Contact List</td>
</tr>
<tr>
<td></td>
<td>• Detailed Cards</td>
</tr>
<tr>
<td></td>
<td>For details, see <em>Managing contacts</em> (on page 52).</td>
</tr>
<tr>
<td>Number of contacts to display per page</td>
<td>Lets you select the number of contacts you want to display per page</td>
</tr>
<tr>
<td>Import from .CSV</td>
<td>Lets you import contacts. The file must be in the CSV format. <em>More…</em> (on page 59)</td>
</tr>
<tr>
<td>Export to .CSV</td>
<td>Lets you export your contact list</td>
</tr>
<tr>
<td>Restore Defaults</td>
<td>Lets you restore the default options</td>
</tr>
</tbody>
</table>

## Calendar tab

<table>
<thead>
<tr>
<th>Options</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial calendar view</td>
<td>Lets you choose how your Webmail calendars display:</td>
</tr>
<tr>
<td></td>
<td>• Day View—activities of the day</td>
</tr>
<tr>
<td></td>
<td>• Work Week View—activities Monday through Friday of the week</td>
</tr>
<tr>
<td></td>
<td>• 7 Day Week View—activities for seven days of the week</td>
</tr>
<tr>
<td></td>
<td>• Month View—activities of the month</td>
</tr>
<tr>
<td></td>
<td>• Schedule View—activities of the day. If you have different calendars,</td>
</tr>
<tr>
<td></td>
<td>this view displays them side by side.</td>
</tr>
<tr>
<td></td>
<td>For more information, see <em>Choosing a view for your calendars</em> (on page 65).</td>
</tr>
</tbody>
</table>
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### Options

<table>
<thead>
<tr>
<th>Options</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First day of the week</strong></td>
<td>Lets you choose which day of the week should be the first day of the week in your calendar</td>
</tr>
<tr>
<td><strong>Default Reminder</strong></td>
<td>Lets you specify how early you want to receive a reminder for appointments, meetings, or events on your calendars. In the drop-down list, select the amount of time prior to an activity starting time.</td>
</tr>
<tr>
<td><strong>Minutes after which to update the free/busy information on the server</strong></td>
<td>Lets you specify how often you want to update your free/busy status on your calendars. The interval must be between 2 and 199 minutes.</td>
</tr>
<tr>
<td><strong>Show time zone list in appointment view</strong></td>
<td>Displays a list of time zones on the appointment details page. For more information, see Appointment Details tab (on page 74).</td>
</tr>
<tr>
<td><strong>Use the QuickAdd dialog when creating new appointments</strong></td>
<td>Lets you create an appointment or all-day event using the QuickAdd tool. For details, see Using QuickAdd to create an appointment (on page 80).</td>
</tr>
<tr>
<td><strong>Always show the mini-calendar</strong></td>
<td>Lets you view a mini-calendar, which facilitates scheduling no matter which folder you are viewing. For details, see Using the mini-calendar (on page 79).</td>
</tr>
<tr>
<td><strong>Restore Defaults</strong></td>
<td>Lets you restore the default options</td>
</tr>
</tbody>
</table>

### Notes tab

<table>
<thead>
<tr>
<th>Options</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of notes to display per page</strong></td>
<td>Lets you select how many notes you want to display per page.</td>
</tr>
<tr>
<td><strong>Default color for new note</strong></td>
<td>Lets you specify a color for notes you create. In the drop-down list, select a color.</td>
</tr>
<tr>
<td><strong>Restore Defaults</strong></td>
<td>Lets you restore the default options</td>
</tr>
</tbody>
</table>
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**Tasks tab**

<table>
<thead>
<tr>
<th>Options</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default task view</td>
<td>Lets you choose a view for your tasks:</td>
</tr>
<tr>
<td></td>
<td>Simple List</td>
</tr>
<tr>
<td></td>
<td>Detailed List</td>
</tr>
<tr>
<td></td>
<td>Active Tasks</td>
</tr>
<tr>
<td>Number of tasks to display per page</td>
<td>Lets you specify how many tasks you want to display per page</td>
</tr>
<tr>
<td>Restore Defaults</td>
<td>Lets you restore the default options</td>
</tr>
</tbody>
</table>

**Rules tab**

On this tab, you can create rules that you use to manage or filter email messages that arrive in your inbox. For details, see *Managing messages with rules* (on page 107).

**Managing messages with rules**

Rules help you manage email messages by performing certain actions on messages that meet certain conditions. After you create a rule, Webmail applies the rule to all messages that arrive in your inbox.

From the Rules tab in Options, you can:

- create a rule. *More…* (on page 109)
- edit a rule. *More…* (on page 111)
- delete a rule. *More…* (on page 111)
- organize your rules. *More…* (on page 112)
To access the **Rules** tab, click this button on the left navigation bar.

**Examples of rules**

<table>
<thead>
<tr>
<th>Rule Name: Purchasing</th>
<th>If the following conditions are met:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>From</strong></td>
<td>People</td>
</tr>
</tbody>
</table>

| Perform the following actions: |
|-----------------------------|------------------|
| **Forward to** | People | **Jane Doe** |

While out of the office, you can automatically forward your manager all messages sent by Jeff Miller.

**Note.** You can also set up an out-of-the-office message.

*More…* (on page 100)
Examples of rules

You can automatically move all messages that contain the word "sales" in the subject to the Follow-Up folder.

Creating a rule

To create a rule, follow these steps:

1. Go to the Rules tab in Options. For more information about rules, see Managing messages with rules (on page 107).
2. Click New Rule.
3. See this table to learn how to create a rule. For tips on setting up conditions or actions for a rule, see Limitations for conditions and actions in your rules (on page 111).
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Enter a name for the rule.

If you select one of these conditions—Subject, Body, and Subject or body—in the dropdown list, click the text box next to Contains and follow the instructions on the screen to enter the words that you want to filter.

If you select From in the drop-down list, enter the person’s email address in the text box next to People or click People to find the name in your contact list or global address list.

Note. Address auto-completion is available.

To add more conditions to the rule, click the plus sign.

To remove conditions from the rule, click the minus sign.

If you select the action Move to, click Browse to select a folder.

If you select the action Forward to, enter the person’s email address in the text box next to People or click People to find the name in your contact list or global address list.

Note. Address auto-completion is available.
Limitations for conditions and actions in your rules

The conditions you set up for any rule in Webmail must meet these requirements:

- **Subject**—You can enter up to five words at the Contains text box.
- **Body**—You can enter up to five words at the Contains text box.
- **Subject or body**—You can enter up to five words at the Contains text box.
- **From**—You can enter up to seven email addresses.

The actions you set up for any rule in Webmail must meet these requirements:

- **Move to**—You can move messages to mail folders only. You cannot move messages to folders such as Calendar, Notes, Tasks, Public Folders, and so on.
- **Forward to**—You can enter up to seven email addresses.

These limitations also apply:

- Rules that are not supported by Webmail but supported by Microsoft Outlook appear dimmed—inactive—in Webmail and cannot be edited.
- You cannot deactivate a rule.
- Webmail does not support rules with exceptions.

Editing a rule

To edit a rule, follow these steps:

1. Go to the Rules tab in Options.
   
   For more information about rules, see *Managing messages with rules* (on page 107).
2. Select the rule and then click *Edit Rule*.

Deleting a rule

Follow these steps:

1. Go to the Rules tab in Options.
   
   For more information about rules, see *Managing messages with rules* (on page 107).
2. Select the rule and then click *Delete Rule*. 
Organizing your rules

Webmail applies the rules according to the order in the list on the Rules tab. If you change the order, the order the rules are applied will change accordingly.

To organize your rules:

1. Go to the Rules tab on the Options page.
   For more information about rules, see Managing messages with rules (on page 107).
2. Select the rule and then click Move Up or Move Down appropriately.

Note: Any changes you make to the order of rules in Webmail do not reflect in Microsoft Outlook.

Searching for items and email messages

Webmail offers you various ways to search. You can search for items and email messages based on:

- a word or phrase—You can use the search toolbar, which searches in your inbox or in another folder such as calendars, contacts, notes, and tasks. More… (on page 118)
criteria other than a word or phrase—Use Search Builder to perform different types of search. More… (on page 114)

For example, you can search for:
- email messages sent within a date range
- email messages from your manager that were addressed to you only
- email messages by a certain status, such as flagged, unread, replied, and so on.
- contacts from a specific company
- items in a saved search folder

Note: You can also search in a public folder. See Searching for posted items in a public folder (on page 119).
Searching by using Search Builder

Search Builder is an advanced search tool that lets you perform different types of search. For each type of search that you choose, a small pane opens, on which you can enter or select your criteria.

To use the search builder:

1. Click Search Builder.

2. Click the appropriate buttons on the search toolbar and specify your criteria on the mini-panes.

   For details, see How Search Builder works (on page 115).

3. Click Search.

   You can click Save to save your search results. More... (on page 121)
Chapter 3: Using Webmail

Click Close to close the search builder.

How Search Builder works

To perform a search based on a specific criterion, click the appropriate button in this toolbar.

This table describes how you can search using each of the criteria mini-panes.

<table>
<thead>
<tr>
<th>Criteria mini-pane</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Type**           | Lets you search by a specific type of items. Click **Type** to select a type from the list:  
  - Email messages  
  - Personal contacts  
  - Calendar appointments  
  - Notes  
  - Post items  
  - Task items  
  - All item types |
| **Attachment**     | To search for messages that contain no attachments, select **No Attachments**. To search for messages that contain attachments, select **Any Attachment**. If necessary, you can include other criteria such as Basic, Status, or Date. |
### Criteria mini-pane

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Basic</strong></td>
</tr>
<tr>
<td>Lets you search by typing partial or full text (not case-sensitive) from any of these areas in email messages:</td>
</tr>
<tr>
<td>- <strong>From</strong>—name of the person that appeared in the From box</td>
</tr>
<tr>
<td>- <strong>To/Cc</strong>—name of the person that appeared in the To or Cc box</td>
</tr>
<tr>
<td>- <strong>Subject</strong>—text that appeared in the Subject box</td>
</tr>
<tr>
<td>- <strong>Content</strong>—body of the message</td>
</tr>
<tr>
<td>Webmail also lets you open multiple instances of the Basic pane to perform an &quot;and&quot; type search.</td>
</tr>
<tr>
<td><strong>Example.</strong> If you want to search for messages sent by John, Nicole, and Sarah respectively, you can open three instances of the Basic mini-pane and type John, Nicole, and Sarah in the three respective From boxes.</td>
</tr>
<tr>
<td><strong>Date</strong></td>
</tr>
<tr>
<td>Lets you search for messages received after, on, or before a selected date</td>
</tr>
<tr>
<td>You can open up to two instances of the Date pane. This option is useful if you want to search between two dates.</td>
</tr>
<tr>
<td><strong>Note.</strong> If you use this criterion, the Time criterion becomes unavailable.</td>
</tr>
<tr>
<td><strong>Folder</strong></td>
</tr>
<tr>
<td>Lets you limit search in the folders you select</td>
</tr>
</tbody>
</table>
### Criteria mini-pane

<table>
<thead>
<tr>
<th>Criteria mini-pane</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Saved Searches</strong></td>
<td>If you save your previous searches, each saved search appears in this mini-pane. To perform a new search based on a specific saved search, select the name of the saved search.</td>
</tr>
<tr>
<td><strong>Size</strong></td>
<td>Lets you search for items larger or smaller than the size you specify. You can open up to two instances of the Size pane. This option is useful if you want to search within a range of sizes.</td>
</tr>
</tbody>
</table>
| **Status** | Lets you search for messages based on statuses such as these:  
- Flagged  
- Unflagged  
- Read  
- Unread  
- Replied  
- Forwarded |
| **Time** | Lets you search for items or messages you received or created within a certain time frame. **Example.** If you want to search for tasks that you created this week, select **Task items** under **Type** and select **this week**. **Note.** If you use this criterion, the Date criterion becomes unavailable. |
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Searching by words or phrases

The search toolbar in Webmail lets you quickly search for email messages or other items using a word or phrase.

Review this section to learn how to search by a word or phrase.

Enter the key word—partial or full text—for which you are searching. Key words are not case-sensitive.

**Tips for entering a key word:**

- To find an email message, enter text from the To, CC, BCC, From, or Subject box.
- To find a contact, enter the first name, middle name, last name, email address, or the company name. For example, an email address could be Appleby or appleby@ewg.com.
- To find a calendar activity, enter text from the Subject box.
- To find a note, enter text from the content of the note.
- To find a task, enter text from the Subject box.
Select a folder in which you want to search for the key word.

- **Inbox**: Searches in your inbox
- **Mail I Received**: Searches in your inbox and all its subfolders
- **Mail I Sent**: Searches in the Sent Items folder
- **All mail folders**: Searches in all mail folders
- **Contacts**: Searches for contacts in your default contact folder, Contacts
- **Choose folders**: Allows you to search in any of these folders:
  - mail system folders and custom folders in the Folders list
  - contact folders
  - calendar folders
  - note folders
  - task folders

If you select **Include subfolders**, all subfolders of the selected folders will be searched. You do not have to select subfolders one by one.

Select the specific folders and then click **OK**.

Click **Search** to start the search.

Click this button to save your search results. More… (on page 121)

### Searching for posted items in a public folder

The types of posted items you can search for include files, messages, contacts, and calendar items. For more information, see *About the content types* (on page 89) for public folders.

**Important**: You can search in one public folder at one time.
To search for posted items in a public folder:

1. Go to Public Folders by clicking this button on the left navigation bar.

2. Go to the specific public folder.

3. Type the key word on the search bar, located at the top of Webmail, and then click Search.

For help in entering a key word, see *Searching by words or phrases* (on page 118).
Saving search results

Webmail allows you to save your search results. The only search results you cannot save are posted items in a public folder.

To save search results:

1. Click the Save button on the simple search toolbar or Search Builder, as appropriate.

   ![Save button]

   or

   ![Save button]

2. Enter a name for the saved search, and then click OK.

Where saved searches appear

You can access your saved searches under your mail folders.
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