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Lesson # 1: Getting Started

OBJECTIVES
Participants will be able to
- Access the University Collaboration Suite (UCS) Web Interface
- Recognize the components of the Web Interface

UCS OVERVIEW
The Penn State environment for electronic collaboration provides users with a choice of email and calendaring clients including: the University Collaboration Suite (UCS) desktop and web based clients, Microsoft Outlook, and Mozilla's Thunderbird, Mail.app, and iCal. This opportunity to choose provides users Operating System independence when working with the collaboration suite. The technology being used to provide this service is VMWare's Zimbra Collaboration Server (ZCS).

Beginning in 2008, Penn State conducted a series of initiatives to scope and evaluate options for electronic collaboration. Participants represented 17 non-ITS units and ten ITS units. One of the outcomes from those investigations was the decision to deploy UCS as a centrally provisioned electronic collaboration system for faculty and staff. We are pleased to share that this recommendation was approved and support has been given for UCS to be deployed as a common good, no-fee service for all University faculty and staff. If your department is interested in using UCS, please contact your ITS Consultant (http://css.its.psu.edu/node/37) for more information about UCS and the migration process.
Logging in

1. Open Mozilla Firefox.
2. Enter https://train2.ucs.psu.edu into the browser address bar.

You will be directed to the Penn State WebAccess login screen.

3. Enter your Access Account User ID and Password.
4. Click the Log In button.

The UCS Web interface is displayed with the Mail application selected.
**UCS WEB INTERFACE**

By default, the UCS web interface will display in full screen view with the Mail tab activated. The web interface is divided into several different areas.

**Window Header**

The window header is located at the top of the screen and contains tools that apply to the entire UCS web client.

- **Search bar**: Search within mail, contacts, global address lists, appointments, tasks, files, and shared items. UCS allows users to save frequently-used searches using the save button and conduct detailed searches using basic or advanced filters, in addition to conditionals.
- **Username**: The username under which you logged in. Click the dropdown arrow next to your username to access product help or sign out of your account. When you hover your mouse over your username, your current quota usage will appear.

**Application Tabs**

The application tabs, located below the window header, display available UCS applications.

**Toolbar**

The toolbar, located below the application tabs, displays available commands for the current application tab selected. The Mail toolbar will be displayed by default as this is the application tab that is active upon login.
Overview Pane

The Overview pane, located on the left side of the screen, displays active application items, saved searches, tags, and Zimlets, regardless of which application is active. When the Mail application is active, the Overview pane will include system and custom mail folders. When the Calendar application is active, the top of the Overview pane will include a calendar list.

![Default Overview pane](image)

Mini-Calendar

The Mini-Calendar, located below the Overview pane, displays a small calendar that allows users to jump to a specific date by clicking on it. The current date has an outlined box around it and is displayed in red. Clicking the single arrows will move the Mini-Calendar to the previous or next month. Clicking the double arrows will move the Mini-Calendar to the previous or next year.

![Mini-Calendar](image)

Content Pane

The Content pane, located in the middle of the screen, changes depending upon the active application:

- The Content pane displays email messages.
- The Address Book application displays the Contacts address book.
- The Calendar application displays the open calendar(s).
- The Tasks application displays the default Tasks list.
- The Briefcase application tab displays the default Briefcase folder.
Reading Pane
The Reading pane allows users to preview email messages from the Inbox without opening the emails. The Reading pane may be displayed below or to the right of the Content pane. Users also have the option to turn the Reading pane off. By default, the Reading pane is displayed at the bottom. Users may choose their Reading pane option by clicking the View button on the Mail toolbar and making a selection.

![Reading Pane options](image)

Figure 8: Reading Pane options under the View button

ADDITIONAL FEATURES

Sharing Folders
UCS users can share Mail, Calendars, Address Books, Tasks lists, and Briefcase folders with others including internal UCS users, Penn State individuals not on UCS, and the public. The steps for sharing folders of any type are the same:

1. Select the folder to be shared by clicking the folder name in the Overview pane.
2. Click the down arrow to the right of the folder name.
3. Select Share Folder from the drop-down menu.
4. Select who to share the folder with:
   - Internal users or groups
   - External guests (view only; password required)
   - Public (view only, no password required)

   NOTE: Be careful when sharing confidential information as it may violate Penn State policy.

5. Type the email address of the recipient in the Email text box.
6. Select their role and privileges:
   - None
   - Viewer – View
   - Manager – View, Edit, Add, Remove
   - Admin – View, Edit, Add, Remove, Administer

   7. Select a notification message from the drop-down menu.

   NOTE: Grantors can opt not to send a notification message.

8. Click the OK button.
When users share a folder, a copy of the shared folder is put in the grantee’s folder list located in the Overview pane, and no notification message is sent to the grantor by default. When the folder is selected, the content displays in the Content pane. The Sharing option under the Preferences tab helps users manage shared items. This shows both the folders the user has shared with others and folders that have been shared with the user.

**Granting Access to Folders**

Users can share folders with internal UCS users, Penn State individuals not on UCS and the public. Mail folders are the exception to this rule. Mail folders can only be shared with internal UCS users or Penn State individuals not on UCS and not the public.

**Internal UCS Users or Groups**

When a folder is shared with internal UCS users or groups, the user can select the type of access to grant:

- **None:** This is an option to temporarily disable access to a grantor’s shared folder without revoking the share privileges. The grantee still has the folder in their list but cannot view or manage activities in the folder.
- **Viewer:** The grantee can view content in the folder.
- **Manager:** The grantee has permissions to view, edit, add and remove content.
- **Admin:** The grantee has permission to view, edit, add, and remove content; and share the folder with other users.

**External Guests**

Folders shared with external guests require that the guest utilize a specific URL as well as a personal password to view the folder content. The grantee will be directed, via email, to accept the shared item and will be prompted to create a display name and password when entering for the first time. Once completed, they will be directed to a simplified UCS interface, in order to view the folder’s contents. External guests cannot make changes to the folder.

**Public URL**

Anyone who knows the URL to the folder can view the folder content. The public cannot make changes to the folder. When a folder is shared with the public, the URL is displayed in the Share Properties dialog box.

**Revoking Access to Shared Folders**

Users can edit the access rights and revoke permissions at any time from the folder’s Edit Properties page or from the Preferences Sharing folder.

**Accepting a Folder Share**

When a folder is shared with a user, the recipient will receive an email notification. When the user accepts the share from the email, the folder link is added to their Overview pane.
Finding Shares

The Overview pane allows users to quickly find and add folders that have been shared with them. In the Find Shares field, users can enter an email address to see if an item was shared with them from a specific person.
Lesson #2: Working with UCS Email

OBJECTIVES
Participants will be able to
- Manage the Inbox
- Work with email messages
- Work with shared email folders
- Change default email settings

MANAGING YOUR INBOX

Viewing Email Messages
UCS offers two options for viewing messages in the Inbox. Users may choose between message view and conversation view by clicking the View button on the Mail toolbar.

Message View
Message view displays email messages in the Inbox with the most recent at the top.

Conversation View
Conversation view displays email messages grouped by subject. All messages in a conversation have the same subject; therefore, the subject line will only appear once. All messages in the conversation are displayed, even if they are stored in different folders. Clicking the conversation arrow will display a list of related messages in the conversation. Any unread message within a given conversation is marked with bold face font and a blue dot next to sender’s name.

Figure 9: Conversation view with unread messages

Sorting Email Messages
Email messages can be sorted by clicking the headings for the From, Attachment, Subject, Size, or Received columns. By default, email messages are sorted with the most recent at the top. Selecting the Read / Unread column header will filter the inbox to display unread messages. Selecting this option again will display read and unread messages.

Figure 10: Email column headings
Moving Email Messages

Email messages can be moved from one folder to another using one of two methods:

- Drag and drop the message into the folder within the Mail Overview pane. If the email message displays a red border, it cannot be moved to the chosen folder.
- Select the item and click the Move button on the toolbar. Select a folder into which you’ll move the message and click OK.

Flagging Email Messages

By default, the Inbox will display a Flag column which indicates whether or not an email message has been flagged. Flags distinguish messages as being important or requiring follow-up action. A flag can be added to a message by clicking within the flag column next to the message. The same process is used to remove a flag from a message.

Figure 11: List of emails with a flagged message

Tagging Email Messages

Tagging is similar to flagging but with additional functionality. Tags can be applied to messages, contacts, tasks, briefcases and calendar items. Users can create and apply multiple tags to a single item in order to apply several categories simultaneously. If enabled in Preferences, tagging an email changes the color of the email to the color of the tag.

To create a tag, select the item, click the Tag button in the toolbar, name the tag, and assign a color. Once a tag has been assigned, it will be added to the Overview pane below the Tags heading.

Figure 12: UCS tag listed in the Overview pane

Clicking on a specific tag will display all items that have that particular tag assigned.

Deleting Email Messages

To delete messages, select the check box next to a message and click the Delete button on the toolbar. Deleted messages are moved to the trash folder. Deleted messages can be recovered from the Trash by right-clicking on the Trash folder and selecting Recover Deleted Items.

NOTE: The Junk and Recover Deleted Items folders will be pruned after 30 days. The Trash folder will not be pruned, but all items contained within the Trash folder will count towards the user’s data storage quota.
**Activity Stream Filter**

You can set up the Activity Stream filter to have certain email messages, such as messages sent through distribution lists or bulk email messages, sent to your Activity Stream folder instead of to your Inbox. Configuring the Activity Stream filter automatically adds an Activity Stream folder to your personal folders list in the Mail Overview pane.

To configure the Activity Stream filter:

1. Click the **Options** icon (Gear icon) in the Mail Overview pane.
2. Select **Activity Stream** from the drop-down menu.
3. In the Activity Stream dialog box, select the **Enable moving messages into Activity Stream** checkbox.
4. Select the **type of messages** to move:
   - Messages where your address is not in either the To or Cc field
   - Messages from people not in your address book
   - Messages sent to a distribution list of which you are a member
   - Commercial mass marketing and bulk mail messages
5. Click **Save**.

The Activity Stream filter can also be managed under the Filter page under the Preferences tab.

**Composing/Responding to an Email Message**

UCS uses standard email functionality with several enhancements. Users can take advantage of UCS’s automatic address completion feature when composing a new email message. Users have the ability to:

- Send email messages instantly or choose a future date and time for the message to send automatically.
- Include an attachment.
- Include a custom signature.
- Carbon Copy (Cc) or Blind Carbon Copy (Bcc) other individuals.
- Request a read receipt.
- Assign an email priority.
- Reply to or forward a message.

**WORKING WITH MAIL FOLDERS**

**Creating a New Mail Folder**

UCS allows users to create custom folders. Custom folders can be placed within a system folder such as the Inbox, or within another custom folder. In addition to customizing folder names, a color may also be applied.
**EXAMPLE**

In this exercise, we will create a new custom folder in the Inbox to store all email messages related to the UCS project.

1. Click the **Mail** tab.
2. Click the Folder **Options** icon (Gear icon) in the Mail Overview pane.
3. Select **New Folder** from the drop-down menu.
4. Type **UCS Project** in the Name: field.
5. Select **Blue** from the Color drop-down menu.
6. Select **Inbox** from the Folder list.
7. Click the **OK** button.

The UCS Project folder is added to the Mail Overview pane below the Inbox.

![Figure 13: Overview pane with UCS Project mail folder displayed](image)

**Sharing a Mail Folder**

UCS users can share any mail folder, including the Inbox folder and sub-folders, with other users.

When sharing a mail folder with another internal user, access privileges must be granted. UCS has three different access privilege categories for internal UCS users:

- **Viewer**: Grantee can view folder content.
- **Manager**: Grantee can view, edit, and delete content.
- **Admin**: Grantee can view, edit, delete, accept, decline, and administer content.

**NOTE**: Users with Manager or Admin privileges will have the ability to respond to email messages within the folder on behalf of the folder owner.

**EXAMPLE**

In this exercise, we will share the UCS Project folder and grant Manager privileges.

1. Click the **Mail** tab.
2. Click the **UCS Project** folder in the Mail Overview pane.
3. Select **Share Folder** from the drop-down menu.
4. Type your **classroom partner’s email address** in the Email: field.
5. Select **Manager** under the Role heading.
6. Click the **OK** button.

By default, an email notification will be sent to the shared user.

**Accepting/Declining a Shared Folder**

By default, users receive an email notification when they have been granted access to another user’s folder. The email will include the option to accept or decline the share. If the share is accepted, the folder will be displayed within the Overview pane.

**EXAMPLE**

In this exercise, we will accept the UCS Project folder share.

1. Click the **Mail** tab.
2. Click the **Inbox**.
3. Open the **share notification email message**.
4. Click the **Accept Share** button at the top of the email message.
5. Type the **first and last name of your partner** followed by **Share** in the Name: field.
6. Select **Yellow** from the Color: drop-down menu.
7. Click the **Yes** button.

The shared folder is added to the Mail Overview pane below your system folders.

![Folder List](image)

Figure 14: Overview pane with new shared folder displayed
Searching for a Shared Mail Folder

Users can search for a shared folder if a share notification email has not been sent by the folder owner. Locating shared items can be done at any time using the Find Share feature found in the Mail Overview pane. This feature is available within all of the applications.

1. Click the **Mail** tab.
2. Click the **Find Shares** link in the Mail Overview pane.
3. Type the **instructor’s email address** in the Find Shares: field.
4. Click the **Search** button.

![Add Shared Folder dialog box](image)

Figure 15: Add Shared Folder dialog box

5. Select the **Classroom Share** folder.
6. Click the **Add** button.

The folder list will now contain the new share.

![Overview pane with new shared folder displayed](image)

Figure 16: Overview pane with new shared folder displayed
SETTING EMAIL PREFERENCES

Changing Default Email Display Settings

UCS default user preferences are configured when the account is created. Users can change default settings located under the Preferences tab. Email preferences are displayed by clicking Mail in the Preferences Overview pane.

Figure 17: Mail preferences options

Check New Mail: By default, UCS will refresh the Inbox and check for new mail every 5 minutes.

Reading Pane: Select if the message should be marked as read immediately, after a specified time in seconds, or should not be marked as read at all.

Message Selection: Select where the cursor should move after a message is deleted.

Message Preview: Change the way you preview an email message.

Message Color: Set the color of messages and conversations according to the color of the tag.

Default Mail Search: Specify which messages are displayed when you open your mailbox.
Changing Settings for Receiving Messages

Users can specify how to handle email messages that have a return receipt request from the sender:

<table>
<thead>
<tr>
<th>Read Receipt: When I receive a request for a read receipt</th>
</tr>
</thead>
<tbody>
<tr>
<td>○ Never send a read receipt</td>
</tr>
<tr>
<td>○ Always send a read receipt</td>
</tr>
<tr>
<td>○ Ask me</td>
</tr>
</tbody>
</table>

Figure 18: Read receipt options

Never send a read receipt: By default, when a message is received with a return read receipt request, the request is ignored. The recipient is not aware of the request.

Always send a read receipt message: A return read receipt message is automatically sent when the message flagged for return read receipt is opened.

Ask me: Recipients are asked if they want to send the read receipt.

Changing Settings for Spam Mail

Users can specify how to handle email messages from certain email addresses:

<table>
<thead>
<tr>
<th>Spam Mail Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Block messages from:</td>
</tr>
<tr>
<td>enter email address or domain</td>
</tr>
<tr>
<td>Add</td>
</tr>
<tr>
<td>Remove</td>
</tr>
</tbody>
</table>

Figure 19: Spam Mail options

Block messages from: Email addresses from senders and domains that should always be treated as junk.

Allow messages from: Email addresses of trusted individuals and domains whose messages are not sent to the Junk folder. Messages from these email addresses are never blocked.

Creating a Signature

Users have the ability to create signatures for their email messages. Signatures may include a name, title, office address, phone number, or additional closing information. Multiple signatures can be created and applied to email messages as needed.
Designating a Delegate

Users have the ability to designate another user as a delegate. Delegates can send email messages as you or on behalf of you without having manager rights to your inbox. This option is available under Accounts in the Primary Accounts Settings section.

Filtering

Users can create mail filters that manage incoming and outgoing email messages, including Calendar related messages. Filtering applies a set of rules to email messages and then executes a specified action.

Server-Side Filtering

Server-side filtering allows users to apply filtering rules for their mailboxes to the server before email is downloaded to their email program. Server-side filtering is beneficial because the users will not need to spend time downloading all mail, and then organizing it in their email program’s organizational system. Once filters are set up in the UCS Web Client, they will also apply to the user’s individual email clients.

Spam Filtering

Emails entering the Penn State system are scanned and classified. As a result, headers are created in each email, and the values associated with those headers can be used to filter out possible spam message. UCS uses the X-PSU-Spam-Level filter. This filter uses a star rating system from 1 through 10 to filter email. The more stars assigned to the email means a higher probability that the email is spam.

This is an example of a four star rating that was inserted into the header of an email scanned by the X-PSU-Spam Level filter.

![Figure 20: X-PSU-Spam Filter with four star rating](image)

UCS users can set their Spam Level Controls by clicking the Preference tab and selecting Filters from the Preferences Overview pane. If the Spam Control Level 1 filter is activated, any piece of mail with at least one spam star will be filed into the Junk folder, making it a very aggressive spam filter.

![Figure 21: Spam Control Level filters](image)
Users can also set up mail preferences to identify specific addresses or domains to block or not block. Since this is done at the server level, the spam filter allows the user to control which email messages appear in their inbox.

![Figure 22: Filter options](image)

**Client-Side Filtering**

Client-side filtering allows users to apply filtering rules to their mailboxes through their email client as their emails are downloaded to their Inbox. Filters set up within a local email client will only work inside the client where the filters were created.

**EXAMPLE**

In this exercise, we will create a server-side filter called UCS_Email.

1. Click the **Preferences** tab.
2. Select **Filters** in the Preferences Overview pane.
3. Select the **Incoming Message Filters** tab.
4. Click the **New Filter** button.
5. Type **UCS_Email** in the Filter Name: field.
6. Select **any** from the first drop-down menu.

Any is a condition used when the filter should be applied to a message that matches one or more of the conditions specified by the user. All is a condition used when the filter should be applied only to a message that matches every condition specified by the user.

7. Select **Subject** from the second drop-down menu.
8. Select **contains** from the third drop-down menu.
9. Type **UCS** in the text box.

Typing UCS in the text box will prompt the filter to search the subject of every incoming message for UCS. If UCS is found in the subject, the filter will be applied.
10. Select **Move into folder** from the Perform the following actions: drop-down menu.

11. Click the **Browse** button.

12. Select the **UCS Project** folder.

13. Click the **OK** button.

The filter will now send all incoming email messages that have “UCS” in their subject directly to the UCS Project folder.

Your screen should look like this:

![Add Filter](image)

Figure 23: UCS Email filter completed

14. Click the **OK** button.

Mail filters can also be created directly from an email message by right-clicking on the message and selecting **New Filter** from the drop-down menu.
ADDRESS BOOK

Address books are where contact details are stored. By default the Contacts, Distribution Lists, and Emailed Contacts address books are created in the Address Book. Users can create additional address books and share them with others.

NOTE: Any distribution lists of which you are a member will appear in the Distribution Lists Address Book. Changes must be made through the UMG system. For more information on UMGs, visit the Penn State IT Knowledge Base http://kb.its.psu.edu

- **Personal Address Book:** Contact list that the user maintains and includes Contacts and Emailed Contacts default address books.
- **Global Address List (GAL):** GAL entries cannot be edited; however, GAL addresses can be added to personal address books.

Creating an Address Book

Users can create additional address books by clicking the **Options** icon (Gear icon) in the heading of the Address Book Overview pane. As with other folder types, address books can be shared with internal UCS users, Penn State individuals not on UCS, or the public.

Adding Contacts

Users can add contacts to any of their address books. Only a name is required to create a contact. The user can create detailed contact forms that include full name, multiple email addresses, work, home, and other physical addresses, phone numbers, and an image.

There are multiple ways to add a contact to an address book:

- Select **Contact** from the New Message drop-down menu on the Mail toolbar
- Click the **New Contact** button on the Address Book toolbar; or
- Right-click the name in a message header and choose **Add To Contacts**.

Adding Contacts Automatically

Users can opt to automatically add email addresses from email messages to their Emailed Contacts address book. This feature is enabled in the Preferences tab by selecting the **Add new contacts to “Emailed Contacts”** option. With this feature enabled, when a user responds to a message that includes an email address not in their address books, it is automatically added to their Emailed Contacts address book.

Editing/Deleting/Tagging/Moving Contacts

Users can edit, delete, tag, or move contacts either by selecting the appropriate option on the Address toolbar or by right-clicking on the contact and selecting either **Edit** or **Delete** from the drop-down menu. If a contact is edited, the user must click the **Save** option on the Address toolbar to save the changes. Contacts can also be moved by right-clicking on the contact and selecting **Move** from the drop-down menu or by dragging the contact to the new location.
Creating a Contact Group List

The contact group feature allows users to create contact lists that contain multiple mailing addresses. Contact group lists are created by clicking the *arrow* on the New Contact button from the Address Book toolbar and selecting *Contact Group* from the menu. When the contact group name is selected, everyone whose address is included in the group list is automatically added to the address field of the message.

User Managed Groups (UMG's)

User Managed Groups (UMGs) are operational with UCS. Additional information regarding how to setup a UMG is available through the ITS Knowledge Base.

When a UMG is created, or an existing one modified, the UMG’s administrator has the option to select a check box to **Enable group in UCS [Beta]**. A UCS group will be created and named similarly to the existing UMG. Any changes to the UMG membership will be applied to the UCS group. UCS groups can be used to group-schedule, as well as share calendars, email boxes, and briefcases within UCS. This UMG should be searchable in UCS when group-scheduling, or sharing calendars, emails, and briefcase folders. When sharing an application with a UMG, users have the option not to send an email notification to group members.

**NOTE**: Groups in UCS cannot exceed 250 members. One must disable the group in UCS before adding more than 250 members.

Sharing Address Books

As with the other UCS applications, users can share their address books with internal UCS users, Penn State individuals not on UCS, or the public. By clicking the *arrow* to the right of the appropriate Address Book and choosing *Share Address Book* from the drop-down menu, the user can select whom they would like to share the address book with and assign them a role.

Importing/Exporting Address Books

Contact lists and address books can be imported into or exported out of a UCS Address Book.

Imported lists must be saved as a comma-separated (.csv) file. The **Import/Export** option is found under the Preferences tab on the toolbar. Users have the option to select the address books they would like to import to the list.

Users can export their address books and group lists. The lists will be saved as a .csv file.
Lesson #3: Managing Your Calendar

OBJECTIVES
Participants will be able to
- Create a new calendar
- Navigate the calendar
- Create and edit a new meeting
- Invite users to a meeting
- Set calendar preferences

WORKING WITH CALENDARS

Creating a New Calendar
By default, one calendar is created when an account is established. However, users may create additional calendars as needed.

EXAMPLE
In this exercise, we will create a new calendar called Training.

1. Click the Calendar tab.
2. Click the Calendar Options icon (Gear icon) in the Calendar Overview pane.
3. Select New Calendar from the menu.
4. Type Training in the Name: text box.
5. Select Green from the Color: drop-down menu.
6. Click the OK button.
7. Un-check the box next to the calendar called Calendar to clear the check box.

The Training calendar will display in the list of calendars in the Calendar Overview pane.

Figure 24: Overview pane with Training calendar checked
**Viewing Calendars**

By default, a calendar will display in the Work Week view. UCS offers several different calendar-viewing options.

<table>
<thead>
<tr>
<th>Day</th>
<th>Work Week</th>
<th>Week</th>
<th>Month</th>
<th>List</th>
</tr>
</thead>
</table>

Figure 25: Calendar viewing option buttons

- **Day**: Displays one day’s activities.
- **Work Week**: Displays activities for Monday through Friday.
- **Week**: Displays activities for Monday through Sunday.
- **Month**: Displays an entire month’s activities.
- **List**: Displays a list of activities for a two-week period.

**Navigating Calendars**

UCS calendars can be navigated in a variety of ways.

The navigation buttons, < and >, located at the top of the Content pane, move a calendar to the previous or next day, week, or month, depending on which calendar view is active.

The Mini-Calendar can quickly access a specific date. Selecting a date on the Mini-Calendar will cause your calendar to jump to that date. Clicking the left and right arrows in the Mini-Calendar will move you to the previous or next month in the current year, and clicking the double arrows will move you to same month in the previous or next year.

Figure 26: Mini-Calendar display
WORKING WITH CALENDAR APPOINTMENTS AND MEETINGS

Users can create appointments and meetings on their UCS calendars. An appointment does not include other users, and a confirmation email is not sent when an appointment is created. A meeting does include other users, and a confirmation email is sent when a meeting is created.

Creating a New Meeting

A new meeting can be created in several ways. Users can select the New Appointment button from the Calendar toolbar, or use the QuickAdd feature by right-clicking a date on the calendar in the Content pane or in the Mini-Calendar and selecting New Appointment.

NOTE: Meetings, appointments, and events can be color coded by applying tags. Applying a tag will change the meeting, appointment, or event to the color of the tag.

Creating a Meeting from an Email

Users can also create a meeting request by simply dragging and dropping an email message, conversation, or contact to a date on the Mini-Calendar, or by right-clicking an email and selecting Create Appointment. The information in the message is used to populate many of the fields on the Appointment page.

- The subject of the meeting is the subject of the message.
- The meeting attendees are the email addresses in the To: and Cc: fields. With email conversations, the meeting attendees are the email addresses in the most recent message in a conversation. When creating a meeting with contact from a contacts list, the contact's first email address is added to the attendee field.
- The text of a message or the text of all the messages in a conversation thread becomes the text of the invitation.

Inviting Users to a Recurring Meeting

Recurring meetings can be created for meetings that occur on a regular basis. Users can specify the start and end dates for a recurring meeting.

EXAMPLE

In this exercise, we will create a recurring staff meeting.

1. Select New Appointment from Calendar toolbar.
2. Type Weekly Staff Meeting in the Subject: field.
3. Type the email address of your classroom partner in the Attendees: field.
4. Choose Monday of next week at 1:00 PM from the Start: date and time drop-down menus.
5. Choose 2:30 PM from the End: time drop-down menu.
Once a required/optional attendee, location, or resource has been added to a meeting, the UCS Scheduler will appear above the message box. The Scheduler displays free/busy information for the users added to the meeting in order to avoid a scheduling conflict. If the attendee, location, or resource has changed permissions to restrict the display of free/busy information, no information will be displayed.

An example of the Scheduler is displayed below:

![Scheduler view display](image)

**Figure 27: Schedule view display**

6. Click the **Show Optional** link to show the Optional: field.

7. Type the **email address** of the trainer in the Optional: field.

**NOTE:** Required and optional attendees can also be added to a meeting via the address book or global address list by clicking the **Attendees:** or **Optional:** button.

Users can search for locations by selecting the **Suggest a Location** link. In the Suggested Locations pane that opens, click the Gear icon and enter the information about the location in the Suggestion Preferences dialog box. You can enter the name, site, minimum capacity, building, description, or floor. The column on the right will then display the locations that meet your requirements. Once you have set your preferences, this information is saved and made available when you make other appointments.

8. Click the **Suggest a Location** link to open the Suggested Locations pane.

9. Click the **Gear** icon to open the Suggestion Preferences dialog box.

10. Type **Willard Building** in the Name: field.

11. Click **OK**.

12. Select room **Willard Building, 23 Conference Room, UP** from the list of suggested locations.

**NOTE:** Locations will use the naming convention of building, room number, and campus location.

Recurring meetings are meetings that repeat on a specified schedule. Recurring meetings can be scheduled to repeat daily, weekly, monthly, or yearly, and can be customized.

13. Select **Every Week** from the Repeat: drop-down menu.

14. Select **Custom** from the Repeat: drop-down menu.

15. Select **Weekly** from the Repeat drop-down menu.
16. Click the **Every 1 Weeks On** radio button.

17. Delete the number 1 from the week(s) field.

18. Type the number 2 in the week(s) field.

19. Click the **OK** button.

20. Select **10 minutes before** from the Reminder: drop-down menu.

21. Type **Staff meetings will now be held every other Monday from 1:00 PM to 2:30 PM** in the message box.

22. Click the **Send** button.
Suggested Times Pane

In addition to the Scheduler, the Suggested Times pane will assist users in scheduling meetings by displaying all the meeting attendees’ availability in 30-minute time slots. Click the Suggest a time link in the New Appointment window. The Suggested Times pane will open on the right side of the New Appointment window.

![Figure 28: Suggestion Times pane](image)

Editing a Recurring Meeting

**EXAMPLE**

We will change the next instance of the staff meeting by adding a resource. Resources include computers, projectors, projection screens, and other types of equipment.

1. Navigate to the date of a scheduled staff meeting.
2. Right-click the appointment.
3. Select Instance from the drop-down menu.
4. Select Open Instance from the drop-down menu.

All changes made to this meeting will only affect the meeting instance for the date selected. To make a change to the entire series, you would select Open Series from the drop-down menu.

5. Click the Show Equipment link to display the Equipment field.
6. Click the Equipment button.

Users can search for resources in the Find Equipment dialog box by name, site, description, building, contact, or floor.

7. Type Projector in the Name: field.
8. Click the **Search** button.

9. Select **Willard-Projector**.

10. Click the **Add** button to add the resource.

11. Click the **OK** button.

12. Click the **Send** button.

**NOTE**: To ensure the meeting invitation is sent to the invited attendees, you must click the **Send** button. The **Save** button will create the meeting, but attendees will not receive an invitation.

### Responding to an Appointment Invitation

Meeting invitations in UCS are sent and received through email. Meetings may be accepted, declined, or marked as tentative. A standard or custom notification can be sent to the meeting organizer. Invitation recipients may propose a new time to the meeting organizer if they are unable to attend the meeting.

### Accepting an Invitation

**EXAMPLE**

In this exercise, we will accept a meeting request and add it to the Training calendar.

1. Click the **Mail** tab.

2. Select the **Inbox**.

3. Select the **Weekly Staff Meeting** message sent to you by your classmate in the previous exercise.

Since UCS allows users to create more than one calendar, be sure to add it to the correct calendar when it arrives.

4. Select **Training** from the Calendar drop-down in the body of the email message.

5. Click the **Accept** button at the top of the message.

By default, after accepting a meeting invitation, a reply will be sent to the meeting organizer with the message, “Yes, I will attend.” Also, the original invitation message will be moved to the Trash bin. To decline an invitation, select the **Decline** button at the top of the message.
**Proposing a New Time**

Users can propose a new time to a meeting’s organizer. When users receive a meeting invitation, they can select **Propose a New Time** from the top of the message. The meeting organizer will receive an email with the proposed time and may accept or decline the change.

**Checking for Attendee Responses**

If the meeting organizer has chosen to request responses to the meeting invitation, the response information can be found by opening the meeting and viewing the Scheduler. The Scheduler will indicate whether or not the attendee(s) have responded to the meeting invitation.

If an attendee has not responded, the Scheduler will display a calendar icon with a yellow triangle.

![Figure 30: Not responded icon for meeting invitation](image)

If an attendee has accepted the meeting, the Scheduler will display a green checkmark.

![Figure 31: Accepted icon for meeting invitation](image)

If an attendee has declined the meeting, the Scheduler will display a red X.

![Figure 32: Declined icon for meeting invitation](image)

If an attendee has responded as tentative for the meeting, the Scheduler will display a question mark.

![Figure 33: Tentative icon for meeting invitation](image)
SETTING CALENDAR PREFERENCES

Setting General Calendar Preferences

UCS’s calendar preferences allow users to customize default calendar settings such as calendar view, when the week starts, appointment visibility, and calendar item reminders.

<table>
<thead>
<tr>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default View: Work Week View</td>
</tr>
<tr>
<td>Start week on: Sunday</td>
</tr>
<tr>
<td>Default appointment visibility: Public</td>
</tr>
</tbody>
</table>

- Always show the mini-calendar
- Show Calendars with week numbers
- Automatically add received appointments to calendar
- Show declined meetings

<table>
<thead>
<tr>
<th>Invitation Response:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete invite on reply</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Forward Invites:</th>
</tr>
</thead>
<tbody>
<tr>
<td>For my shared default Calendar forward my invites to</td>
</tr>
</tbody>
</table>

| Show reminders: 5 minutes before |
|----------------|----------------|
| Show reminders for past-due meetings |
| Play a sound (requires QuickTime or Windows Media plugin) |
| Flash the browser title |
| Show a popup notification (requires Yahoo! BrowserPlus) |

<table>
<thead>
<tr>
<th>Default appointment duration</th>
<th>minutes</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Work week and hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work week: Sun, Mon, Tue, Wed, Thu, Fri, Sat</td>
</tr>
<tr>
<td>Work hours: Normal 8:30 AM to 5:00 PM Custom</td>
</tr>
</tbody>
</table>

The timings follow your timezone preferences. Your preferred timezone is (GMT -05:00) US/Canada Eastern

Figure 34: General calendar preferences

**Default View:** Select the default view for a calendar. The default is set to Work Week View. The view options include: Day, Work Week, 7 Day Week, Month, and List.

**Start Week On:** Specify which day of the week should be the first day of the week in a calendar.

**Default Appointment Visibility:** Calendar items can be either Public or Private. The default setting is Public, which means that all incoming calendar invites are marked as Public unless the creator marked the meeting notification as Private. When Private is set, all incoming calendar invites are marked as Private. Details about events that are marked Private do not display.

**Always Show the Mini-Calendar:** Specify whether the Mini-Calendar is displayed at the bottom of the Overview pane.

**Automatically Add Received Appointments to Calendar:** When this is checked, email invitations sent to the Inbox are automatically added to a calendar. Users can accept or decline the invite from either the Inbox or the calendar. When this is not checked, the appointment is added to the calendar when the user clicks Accept or Tentative in the message.
Invitation Response: Specify whether UCS should automatically delete invitations from the Inbox after the user responds to them.

Show Reminders: Set the number of minutes before an appointment when UCS should generate reminders for the user. The default setting is five minutes.

Work Week and Hours: Select the days and times of the week you work. Choose Custom to customize your work day by hour. This information displays in your Free/Busy view.

Default appointment duration: Change the default appointment duration that is displayed in the start and end times when scheduling a new appointment. The default setting is one hour.

Sending Free/Busy Status to Others

Users can send an email with a link to their free/busy status that shows appointments in personal and shared calendars. Click the Calendar tab and the Options icon (Gear icon) in the header of the Calendar Overview pane. Selecting the Send Free & Busy link as either HTML, ICS, or ICS event will open the compose email window. The calendar link appears in the text area. The person receiving the email can click the link and view the schedule. This link can also be copy and pasted into your email signature.

Setting Free/Busy Permissions

By default, all internal and external users are able to view free/busy information displayed in the Scheduler when they are creating a new meeting. UCS users have the option to change free/busy permissions in their Calendar preferences. Free/busy permissions can be found under the Preferences tab, by selecting Calendar from the Preferences Overview pane, and scrolling to the Permissions heading.

<table>
<thead>
<tr>
<th>Free / Busy:</th>
<th>Allow both internal and external users to see my free/busy information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Allow only users of internal domains to see my free/busy information</td>
</tr>
<tr>
<td></td>
<td>Allow only users of my domain to see my free/busy information</td>
</tr>
<tr>
<td></td>
<td>Don't let anyone see my free/busy information</td>
</tr>
<tr>
<td></td>
<td>Allow only the following internal users to see my free/busy information:</td>
</tr>
</tbody>
</table>
Setting Invitation Permissions

By default, all internal and external users are able to invite you to a meeting. Users have the ability to restrict who can send meeting invitations by limiting invitations to internal UCS users, specific users defined by the user, or no users at all. Invitation permissions can be found under the Preferences tab, by selecting Calendar from the left-hand menu and scrolling to the Permissions heading.

<table>
<thead>
<tr>
<th>Invites:</th>
<th>Allow both internal and external users to invite me to meetings</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Allow only internal users to invite me to meetings:</td>
</tr>
<tr>
<td></td>
<td>Don’t let anyone invite me to meetings</td>
</tr>
<tr>
<td></td>
<td>Allow only the following internal users to invite me to meetings:</td>
</tr>
<tr>
<td></td>
<td>Send auto-reply to users who are denied from inviting me</td>
</tr>
</tbody>
</table>

Figure 36: Invitation permission options
PRACTICE EXERCISE 1

1. Create a new recurring meeting invitation starting Tuesday of next week and ending at the end of next year. Set the meeting to occur every other Tuesday and to contain the following information:
   - **Subject**: Project Team Meeting
   - **Attendees**: Your primary and secondary classroom partners
   - **Date**: Tuesday of next week
   - **Time**: 10:30 AM to 11:30 AM
   - **Repeat**: Every other Tuesday
   - **Display**: Out of Office

2. Send the meeting invitation.

PRACTICE EXERCISE 2

1. Accept the Project Team meeting invitation sent to you by your primary classroom partner. Ensure that the meeting has been placed on your Training calendar.

2. Decline the Project Team meeting invitation sent to you by your secondary classroom partner. Edit the reply by writing a short message to your partner before sending.

PRACTICE EXERCISE 3

1. Change your free/busy permissions so that only your primary classroom partner is able to see your free/busy information when scheduling a meeting.

2. Change your invitation permissions so that only your secondary classroom partner is able to invite you to a meeting.
Lesson #4: Working with Shared Calendars

OBJECTIVES
Participants will be able to
- Share a calendar with an internal user
- Search for a shared calendar
- View a shared calendar
- Change user access rights

SHARING YOUR CALENDAR

Users have the ability to share a calendar with internal UCS users, Penn State individuals not on UCS, or the public. Internal UCS users are employees within the University with accounts on the UCS server. When a calendar is shared with an internal user, users have the option of choosing what type of access to grant them.

For each user you share your calendar with, you must select a role (Viewer, Manager, Administrator) that gives them the appropriate access rights to your calendar. Internal UCS users can have the following types of access to a shared calendar:

- **Viewer**: View items
- **Manager**: View, edit, add, and remove items
- **Administrator**: View, edit, add, remove items and administer the calendar

EXAMPLE

In this exercise, we will share the Training calendar and grant Manager rights.

1. Click the Calendar tab.
2. Click the Training calendar to select it.
3. Click the calendar’s drop-down arrow.
4. Select Share Calendar from the drop-down menu.
The Share Properties dialog box will display.

![Share Properties dialog box](image_url)

5. Select the **Internal users or groups** option in the Share With: field.

6. Type the **email address of your classroom partner** in the Email: field.

7. Select the **Manager** option in the Role section.

You also have the option of allowing internal UCS users to view your private appointments by clicking the check box below the role heading.

By default, a message will be sent to the user informing them that you have shared your calendar with them. If you wish to edit the standard email message or opt not to send a message, you must select the appropriate option from the Message drop-down menu.

8. Click the **OK** button.
ACCESSING A SHARED CALENDAR

Accepting an Invitation to a Shared Calendar

Once a user receives an email notification that he or she has been granted access to another user’s calendar, the invited user has the option of accepting or declining the share.

EXAMPLE

In this exercise, we will accept the Calendar share sent by your partner in the previous exercise.

1. Click the Mail tab.
2. Select the email message regarding the new shared calendar.
3. Click the Accept Share button at the top of the email message.
4. Type the first and last name of your partner followed by Calendar in the Name: field.

Your screen should look like this:

![Accept Share dialog box](image)

Figure 38: Accept Share dialog box

5. Click the Yes button.

After navigating to the Calendar tab, the shared calendar will be displayed in the calendar list below the user’s existing calendars.

Shared calendars are indicated by the shared calendar icon.

NOTE: The Search Calendars Zimlet, found in the Overview pane, is an easy way to view another user’s calendar that has not been shared with you. Free/busy times will be viewable; however, detailed information will not be viewable unless the owner of the calendar has set the calendar to public.

Searching for a Shared Calendar

If a user has been granted access to another user’s calendar but did not receive an email notification from that user, the user granted access can still open the shared calendar by searching for it.
EXAMPLE

In this exercise, we will search for a shared calendar and add it to our calendar list.

1. Click the Calendar tab.
2. Click the Find Shares link in the Calendar Overview pane.
3. Enter the email address of the instructor in the Find Shares: field.
4. Click the Search button.
5. Select the instructor’s Training calendar.
6. Click the Add button.

The instructor’s calendar will be displayed in your calendar list with the shared calendar from the previous exercise. By default, shared calendars are displayed in the calendar list in alphabetical order.

Viewing a Shared Calendar

The process for viewing shared calendars is the same as the process of viewing your own calendar(s). Users can have their own calendar and shared calendars open at the same time, displaying them in separate columns for easy scheduling.

EXAMPLE

In this exercise, we will view the shared calendars that were added to our calendar lists.

1. Check the box next to your Training calendar and the boxes next to the two shared calendars in your Calendar list.
2. Click the Day button.

All calendars will be displayed in the Content pane in separate columns. The name of each calendar appears at the bottom of each column. If the Day button is not selected, the calendars will be displayed in the Content pane with all existing calendar items overlaying each other.

3. Select the Merge / Split button at the bottom of the page to toggle the calendar view between column and overlay view.

Organizing Calendars into Groups

If you manage multiple calendars, you can group the calendars in a hierarchical display. For example, you could group all shared Calendars under a Calendar folder called Shared Calendars. This option does not group all appointments together in the top-level calendar; it only allows you to easily select a group of calendars to view in the Content pane.

1. In the Calendar Overview pane, click on a calendar.
2. Click the calendar’s drop-down arrow.
3. Select Move from the drop-down menu.
4. In the Choose Folder dialog box, select the calendar group into which you will move the calendar.

If the calendar group is not already created, click the New button in the bottom left of the Choose Folder dialog box, enter a name for this grouping and click the OK button. The new calendar group name will appear in the list. Calendars can only exist in one location in the Calendar Overview pane; it is not possible to place a single calendar in multiple groups concurrently.

5. Click OK.

6. Repeat with additional calendars as desired.

**CHANGING ACCESS PRIVILEGEDS**

In addition to granting access privileges to your calendar(s), access privileges can be changed or revoked at any time.

**Editing Calendar Access Privileges**

**EXAMPLE**

In this exercise, we will edit the access privileges granted to our classmates for the Training calendar.

1. Click the Preferences tab.
2. Select Sharing from the Preferences Overview pane.
3. Click the Edit link next to the user’s information under the Folders Shared by Me heading.
4. Select Admin under the Role heading in the Share Properties dialog box.
5. Click OK.
6. Click the Save button.

Your partner will be informed through an email message of the access privileges change in the same way they were notified when the calendar was first shared.

Users can also revoke access privileges they have granted to other users. By clicking the Preferences tab and selecting Sharing from the drop-down menu, they can select the Revoke link. Users will be asked to confirm they want to revoke access. Users can opt to not notify the person, send the standard email message, or send a custom email message.
PRACTICE EXERCISE 4

1. Share your Training calendar with your secondary classroom partner and grant your secondary partner Admin privileges. Do not send a message regarding the share.

2. Search for the Training calendar shared by your secondary classroom partner and add it to your calendar list.

3. Edit your secondary classroom partner’s rights to your calendar by demoting them to a Viewer.
Lesson #5: Working with Briefcases

OBJECTIVES
Participants will be able to
- Create a briefcase
- Share a briefcase
- Work with briefcase files
- Send a link to a briefcase
- Check files in/out of a briefcase

WORKING WITH THE BRIEFCASE
The briefcase can be used to create, manage, and store documents. Files that are stored within a user’s briefcase can be accessed from any computer with an Internet connection. Briefcase folders can be shared with other users in order to streamline collaboration efforts and assist with version control.

Creating a Briefcase Folder
The process for creating a briefcase folder is similar to creating a folder within the Inbox. Users can create multiple briefcase folders and upload multiple files to each folder.

EXAMPLE
In this exercise, we will create a new UCS Training briefcase folder.

1. Click the Briefcase tab.
2. Click the Folders Options icon (Gear icon) in the Briefcase Overview pane.
3. Select New Briefcase from the drop-down menu.
4. Type UCS Training in the Name: field.
5. Select Gray from the Color drop-down menu.
6. Select Folders from the list.
7. Click the OK button.

Sharing a Briefcase Folder
Briefcase folders can be shared with internal UCS users, Penn State individuals not on UCS, and the public. Internal UCS users can be granted Manager or Admin privileges whereas Penn State individuals not on UCS and the public can only have View access to shared folders and files.
When sharing a briefcase folder, the grantee with Admin or Manager permission can add new files to the folder, edit existing files, and delete files. The detailed information shows when and by whom a file is modified.

**EXAMPLE**

In this exercise, we will share the UCS Training briefcase folder with our classroom partner and grant Manager access to all of the files placed within the folder.

1. Click the **Briefcase** tab.
2. Click the **UCS Training** folder to select it.
3. Click the **drop-down arrow** beside the folder name.
4. Select **Share Folder** from the drop-down menu.
5. Type the **email address of your classroom partner** in the Email field.
6. Select **Manager** under the Role heading.
7. Click the **OK** button.

**Accepting/Declining a Shared Briefcase**

By default, users receive an email notification when they have been granted access to another user’s briefcase. The email will include an option to accept or decline the share. If the share is accepted, a folder will be displayed within the recipient’s Briefcase Overview pane.

**WORKING WITH FILES IN THE BRIEFCASE**

**Downloading an Attachment to the Briefcase**

Files can be added to a briefcase by uploading them from a local computer or by downloading received attachments.

**EXAMPLE**

In this exercise, we will download a **Meeting Agenda** file from an email attachment into the default Briefcase.

1. Click the **Mail** tab.
2. Select the **Meeting Agenda email message** sent by the instructor.
3. Click the **Briefcase** link located in the body of the email message.
4. Select the **default Briefcase** folder.
5. Click the **OK** button.
NOTE: A copy of the attachment is put in your Briefcase folder. If you are managing your quota, you may want to delete the attachment in the email when you place the attachment in your Briefcase.

**Sending an Attachment from the Briefcase**

UCS users can send an email with a link to a briefcase file. The briefcase must be shared with the recipient in order for them to work with the file. From the Briefcase tab, click the file to select it, click the **Action** button, and select **Send Link(s)**. Next, click **Yes** in the Confirmation dialog box, and type the **email address of the person who will receive the link** in the To: field. Any modifications made to the linked file are reflected in the owner’s Briefcase folder.

![Email with briefcase link inserted](http://train2.ucps.psu.edu/home/1edu2@psu.edu/Briefcase/UCS_QSG_Briefcase_11202012.pdf)

**Deleting, Tagging, and Moving Briefcase Files**

Users can delete, tag, or move briefcase files by either selecting the appropriate option on the Briefcase toolbar or right-clicking on the briefcase file and selecting the option from the drop-down menu.

**Checking Briefcase Files Out and In**

Users who have shared a briefcase with others can use the **Check Out File** and **Check In File** briefcase feature to manage file editing. When a file is checked out of a briefcase folder, the file is marked as read only. To make changes to the file, you must save it to your computer. Since only one user can check a file out at a time, no other users can make changes to the file until it is checked it back in.

**EXAMPLE**

In this exercise, we will **Check Out** the Meeting Agenda file in the Briefcase.

1. Click the **Briefcase** tab.
2. Select the **default Briefcase** folder from the Briefcase Overview pane.
3. Click the **Meeting Agenda** file to select it.
4. Click the **Actions** button on the Briefcase toolbar.
5. Select **Check Out File**.
6. Select the **Open with** radio button.

**NOTE**: When a file is checked out, a lock icon will appear to the left of the file name.

![Meeting Agenda.docx](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Size</th>
<th>Modified</th>
<th>Author</th>
<th>Folder</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting Agenda</td>
<td>Microsoft Word</td>
<td>2 MB</td>
<td>2/13/2013</td>
<td>gje10</td>
<td>Briefcase</td>
<td>2</td>
</tr>
<tr>
<td>#1</td>
<td>Microsoft Word</td>
<td>2 MB</td>
<td>2/13/2013</td>
<td>gje10</td>
<td>Briefcase</td>
<td>2</td>
</tr>
<tr>
<td>#2</td>
<td>Microsoft Word</td>
<td>2 MB</td>
<td>2/13/2013</td>
<td>gje10</td>
<td>Briefcase</td>
<td>1</td>
</tr>
</tbody>
</table>

Figure 41: A locked briefcase file, indicating it has been checked out

7. Click **OK**.
8. After #1. Old Business, type **Discuss minutes from last week’s meeting**.
9. Select the **File** tab in the Microsoft Word application.
10. Select **Save As**.
11. Select **Desktop** as the save location.
12. Select **Save**.
13. Select the **File** tab in the Microsoft Word application.
14. Select **Exit**.
15. In the default Briefcase folder, click the **locked file** from the Briefcase file list.
16. Click the **Actions** button on the Briefcase toolbar.
17. Select **Check In File** from the drop-down menu.
18. Select **Browse** from the Check In File to Briefcase dialog box.
19. Select the **Meeting Agenda** from the Desktop.
20. Select **Open**.

**NOTE**: If you want to add information about changes, enter it in the **Notes** text area.

21. Click **Check In**.

The file is uploaded. The lock is removed and the file details, including a new version number and notes, are updated in the file list.

To view the version history and the authors, click the **right arrow**. To restore to a previous version, click the **Actions** button on the Briefcase toolbar and select **Restore as Current Version**.
To delete a version you no longer need, select the **file** and click **Delete** on the Briefcase toolbar. Each version of a file counts against your account quota.

Figure 42: Briefcase file with versions displayed
Creating a Document in the Briefcase

Users can create a new document in a briefcase and design the content layout using the Rich Text Format tools.

1. Click the **New Document** button on the Briefcase toolbar.

A blank Zimbra Docs page opens. Compose the content of the page. The default rich text editor allows you to add styles, color, and tables to your page.

![Zimbra document editor](image)

Figure 43: Zimbra document editor

2. Type a **file name** into the textbox in the upper-left of the screen.

3. Click the **Save** button.

4. Click **Save & Close**.
Lesson #6: Using Task Lists

OBJECTIVES
Participants will be able to
- Create a task list
- Work with task lists to edit a task
- Share task lists

WORKING WITH TASKS
The Tasks feature lets users create to-do lists and manage tasks until their completion. Tasks can be added to the default Tasks list, and users can create other custom task lists to organize by more specific activities, such as by work or personal projects.

The user can include detailed information about a task such as defining a start and due date, setting the priority (high, normal, or low) of the task, and keeping track of the progress and percentage completed.

NOTE: Task lists count toward the user’s data storage quota.

Creating Task Lists
Users can create different task lists and configure the lists to sync from remote services such as iCal’s to-do list.

To create a task list:

1. Click the Tasks tab.
2. Click the Tasks Options icon (Gear icon) in the header on the Tasks Overview pane.
4. Type the Task list name and select the color to display the task from the Create New Task List dialog box.
5. Check Synchronize tasks from the remote service to sync the new list to an iCal to-do list.
6. Enter the iCal URL.
7. Click OK.

The list is added to Tasks Overview pane.
Adding Detail to a Task

Users can use task lists to create and track the progress of a task. Details can be added to a task by selecting the Tasks tab from the Application toolbar and selecting Edit from the Tasks toolbar. The following details can be added to a task:

- Location
- Priority - Normal, low, or high
- Progress status
- Percentage complete
- Start date
- Due date
- Reminder date and time
- Add any notes in the text field
- Add attachments

![Figure 44: New Task pane](image)

Viewing Tasks

Users can enable a Preview pane to view the content of a task without opening the task. The Preview pane can display on the bottom or right of the Content pane. Click View on the Tasks toolbar to select how to display the Preview pane. When the Preview pane displays on the bottom, the Task list view does not change. When the Preview pane displays on the right, the Task list view will not show the status and the % (Percent) Complete is shown as a progress bar.

Updating a Task

Users can update the progress made on a task.

1. Open the Task tab.
2. Click the Task in the Content pane to select the task to be updated.
3. Click the Edit button on the Tasks toolbar.
4. Make the changes to the task information.
5. Click the Save button.
Marking a Task Complete
There are two ways to mark tasks as complete:

- Select one or more tasks by right-clicking on them, and then select Mark as Complete. The % (Percent) Completed field is changed to 100%.
- Check one or more tasks and click Mark As Completed on the toolbar.

The task information remains in the user’s Tasks folder.

Creating a Task from an Email
Users can quickly create a task from within an email by right-clicking on the email and selecting Create Task from the drop-down menu.

- The subject of the email becomes the subject of the task.
- The text of the message becomes the text of the task in the Content pane.

Deleting, Tagging, and Moving Tasks
Users can delete, tag, or move tasks by either selecting the appropriate option on the Tasks toolbar or right-clicking on the task and selecting either Edit or Delete from the drop-down menu.

Printing Tasks
Users can print all the tasks in a list or can select specific tasks to print.

- Check the tasks to be printed and select Print selected task(s) from the Print button’s drop-down menu on the toolbar.
- To print the complete task list folder, select the list in the Tasks Overview pane and select Print Task Folder from the Print button’s drop-down menu on the toolbar.

Sorting Tasks
Users can quickly sort task lists to see tasks by status. On the Tasks toolbar, click the View button and select one of the following:

- Not started
- Completed
- In progress
- Waiting for someone else
- Deferred
- All (All shows all tasks no matter the status)
- To-Do List (To-Do List shows tasks with the status of In Progress, Not Started or, if the task is overdue, Waiting for someone else.)
Share Task Lists

UCS users can share their task lists with internal UCS users, Penn State individuals not on UCS, and the public. When sharing a task list with another internal user, access privileges must be granted. UCS has three different access privilege categories for internal UCS users:

- **Viewer**: Grantee can view folder content.
- **Manager**: Grantee can view, edit, and delete content.
- **Admin**: Grantee can view, edit, delete, accept, decline, and administer content.
CONFIGURING MOBILE DEVICES

UCS users can consult the ITS Knowledge Base for information on how to configure UCS on their mobile devices. If a user has the UCS Mobile feature enabled, the Mobile Device folder is available in the Preferences tab. This folder shows which mobile devices the user has configured to sync with their UCS account.

From this folder, users can:

- Initiate a sync from UCS to their device
- Suspend a sync
- Delete mobile devices they no longer use
- Wipe data from the mobile device if stolen

USING THE UCS MOBILE WEB CLIENT

All devices with a web browser can access UCS email, contacts, calendar, and Briefcase folders using the UCS Mobile Web Client.

To use the Zimbra Mobile Web Client, open the web browser on your phone and type http://ucs.psu.edu/ UCS will automatically detect that you are logging in using a mobile device.
ZIMLETS

Zimlets are small programs created as a mechanism to integrate third-party information and content into the Web Client features. Zimlets enhance the functionality of the UCS client.

Viewing Available Zimlets

Zimlets are accessed from the Preference tab by selecting the Zimlet option in the Preferences Overview pane. A table of available Zimlets is displayed.

Enabling/Disabling Zimlets

Zimlets are enabled or disabled by selecting the check box to the left of the Zimlet.

<table>
<thead>
<tr>
<th>Zimlets</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cisco Click2Call</td>
<td>Provides Click to Call capability Cisco UC</td>
</tr>
<tr>
<td>emailTemplates</td>
<td>Allows users to insert Email Templates</td>
</tr>
<tr>
<td>Mitel Click2Call</td>
<td>Provides Click to Call capability Mitel UC</td>
</tr>
<tr>
<td>Phone</td>
<td>Highlights phone numbers to enable Skype calls.</td>
</tr>
<tr>
<td>Search Highlighter</td>
<td>After a mail search, this Zimlet highlights search terms with yellow color.</td>
</tr>
</tbody>
</table>

Figure 46: Zimlet options
Technology Training Resources

Find face-to-face and online training workshops through Penn State ITS Training Services at http://its.psu.edu/training/catalog/

Learn about Training On Demand (sessions upon request for groups of five or more) at http://its.psu.edu/training/ondemand/

Explore thousands of free video tutorials that are available for self-paced learning at http://lynda.psu.edu/

Take free Microsoft eLearning courses or find out more about free certification vouchers at http://msitacademy.psu.edu/

Discover training news, fun tips, and session reminders via social media on @psuITStraining (Twitter) http://www.facebook.com/psuitstraining/ (Facebook)

Join one of our news lists to receive monthly email notification of all upcoming technology training opportunities, by sending a blank email to L-TRAINING-NEWS-SUBSCRIBE-REQUEST@LISTS.PSU.EDU (Training News List) L-FACULTY-TECHTRAINING-SUBSCRIBE-REQUEST@LISTS.PSU.EDU (Faculty Training List) L-CAMPUS-TECHTRAINING-SUBSCRIBE-REQUEST@LISTS.PSU.EDU (Campus Training List)

Additional Technology Resources

Contact the IT Service Desk with general technology-related questions by emailing ITServiceDesk@psu.edu or call 814-865-4357 (HELP)

Search for technology-related information in the IT Knowledge Base at http://kb.its.psu.edu/

Purchase discounted software or software licenses through Penn State at http://software.psu.edu/

Access free online books about popular technology topics through the Penn State Libraries at http://proquest.safaribooksonline.com/