Oracle® Communications Convergence

Online Help

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Preface

This guide explains how to customize the look and feel of Convergence. Although the product architecture permits almost unlimited customization, this guide focuses on concepts, reference, examples, and explanations on how to perform the most commonly used customizations.

Audience

This guide is intended for all Convergence users and system administrators.

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1 Overview of Convergence Online Help

Convergence is Oracle's feature-rich, interactive, high-performance next generation web-based communication client. Convergence provides integrated access to mail, calendar, and address book services.

Convergence provides Web 2.0 add-ons. Your site has to enable an add-on for it to be available in the Convergence UI for you to use.

The following table lists the currently available add-ons that could be enabled at your site.

Table 1-1 Available Add-Ons

Add-on	Comment
Advertising	Makes it possible to display banner ads, text ads, and contextual ads in the Convergence UI.
SMS	Provides one-way SMS through Convergence.

2
Mail

This topic answers your questions about how to write, send, and manage your Email messages:

Receiving Email Messages

This topic answers your questions about how to read received Email messages:

Convergence polls for new Email message every few minutes. You can also force Convergence to poll for new Email message by clicking **Get Mail**.

You can configure Convergence to play a sound when you receive new Email message. See "How Do I Set Sound Notifications?" for more information.

All the Email messages are listed with the following information:

- Subject, Sender's name, date and time of receipt, and Email message size.
- Email messages with the Subject text in bold indicate unread Email message.
- A red flag indicates email that are marked urgent.

The **Mail** selector panel displays the total number of currently unread Email messages. The unread Email message count gets updated whenever you receive a new Email message.

To view other mail in the Inbox, press the Up/Down arrows to select other mail.

A server error appears if an error occurs when retrieving new Email messages.

How Do I Read a New Email Message?

To read a new Email message:

1. In the left-side navigation panel, click the name of the email folder that you want to read.
2. To open a specific Email message, click the corresponding mail row.
3. Double-click the subject to open the Email message in a new tab.

The **Inbox** tab remains open. If you open several Email messages, they display as separate tabs.

Alternatively, press the **Enter** key to open the Email message in a new tab.

4. When you finish reading the Email message, close the tab to return to the Email message list of the current folder.

How Do I Accept or Decline a Calendar Event Through Email?

If accepting and declining calendar events via email is enabled at your site, you can reply to calendar events from your calendar through email.

The email invitation contains the following event information:

- Summary, which is a link that takes you to the calendar invitation details form
- Location
- Description
- Time
- Invitee list

Calendar events sent via email provide three options for the recipient: **Yes**, **No**, and **Maybe**. Click one of these options. **Yes** displays the event on your calendar. **No** keeps the event off your calendar. **Maybe** keeps a tentative, greyed out appointment on your calendar.

Sending Email Messages

This topic answers your questions about how to send Email messages to one or more recipients:

- How Do I Compose and Send a New Email Message?
- How Do I Reply To an Email Message?
- How Do I Forward an Email Message?
- How Do I Check Spelling in My Message?
- How Do I Add Contacts from Address Book?
- How Do I Attach a File to an Email Message?
- How Do I Ask For a Return Receipt When I Send an Email Message?
- How Do I Respond To an Email Message That Asks For a Return Receipt?

How Do I Compose and Send a New Email Message?

To compose a new Email message:

- In two-pane layout, click the **New Mail** icon in the Quick Actions menu in the upper-left corner of the Convergence UI, or click **Write** in the Mail section of the Convergence UI.
- In three-pane layout, select **New Mail** from the **New Mail** drop-down list in the upper-left corner of the Convergence UI or click **Write** in the Messages Listing section of the Convergence UI.

The **Compose** tab consists of the following parts:

- Toolbar menu

The toolbar menu contains the following icons:

– **Send**: Sends the Email message to the respective recipients.
– **Attach**: Attaches a file to the Email message.
– **Save**: Saves the Email message as a draft which you can refer later.
– **Bcc**: Enables you to send a blind copy of the Email message to recipients.
– **Options**: Enables you to add more features to your Email message.
– **Cancel**: Closes the current tab and returns to the Messages view.

- **From**: This field contains a drop-down list with all the configured sender profiles you have for this account. This field is not displayed if you have not configured external POP accounts. This list includes the name followed by the email address of each configured external account. Convergence enables you to collect email from other POP accounts in addition to the default account.
  You can receive, send, reply, or forward email from or to other email accounts that support POP access. To know more about how to set up external accounts in Convergence, see "Collecting Email From External Accounts".
- **To** and **Cc** fields to include recipients email addresses.
- **Subject** field.
- Email Message format menu bar.

To compose and send a new Email message:

1. Click the **Write** icon on the center panel to display the Compose tab in two-pane layout. Click **Write** in the Messages Listing section to display the Compose tab in three-pane layout.
2. Enter the email addresses of the recipients who should receive your Email message in the **To** field. Use a comma to separate multiple addresses.
   Alternatively, click the **Address Book** icon next to the To field to select the email address. To send a copy to a recipient, enter the email address in the Cc field or click the **Address Book** icon next to the Cc field to select an email address.

   See "How Do I Add Contacts from Address Book?" for more information.
3. To send a blind copy to a recipient, click the **Bcc** icon. The **Bcc** field appears. Enter the email address in the **Bcc** field. Optionally, click the **Address Book** icon next to the **Bcc** field to select email address from the saved list.
4. Enter the subject of your Email message in the **Subject** field.
5. Click **Options** in the top toolbar.
   The expanded Email message options are shown.
6. From the priority drop-down list, select the required priority.
   The priorities are **Normal, Urgent,** and **Low**. By default, the Email messages are sent with normal priority.
7. From the **Receipt** drop-down list, select an option. The options are:
   - **None**: Does not perform any action when the recipient receives this Email message.
   - **Read**: Sends a notification when the recipient reads the Email message.
   - **Delivery**: Sends a notification when this Email message is delivered to the recipient.
   - **Delivery and Read**: Sends notifications when your Email message is delivered and also when read by the recipient.
8. Select the **Rich Text** check box to include rich text features in the mail editor.

9. Click in the message text box and enter the text of the Email message. To attach a message to the mail, see "Working with Attachments".
10. Click **Send** to send the Email message.

How Do I Reply To an Email Message?

You can respond to an Email message by clicking the **Reply** option on the toolbar.

To reply to an Email message:

1. Click **Reply**. To reply to the sender and all the recipients, click the downward arrow provided in the **Reply** option.
   A drop-down list of options appear with the following options:
   - **Reply**: Select this option to reply to the sender.
   - **Reply All**: Select this option to reply to the sender and to other recipients of the Email message.

   The mail compose tab appears with the names of the recipients included in the **To** and **Cc** fields as appropriate. The subject of the original Email message is prefixed with **Re**:, and the original message appears inline.
2. If you have configured Convergence for multiple sender identities, select the identity you want to use for this message by selecting an option from the **From** drop-down list. If you have not configured multiple sender identities, the **From** field does not appear. The default identity is used. For more information, see "Sender Identities".
3. (Optional) Enter the email addresses of additional people who should receive your Email message in the To field. Use a comma to separate multiple addresses.
   Alternatively, click the **Address Book** icon next to the **To** field to select email addresses.
   To send a copy to a recipient, enter the email address in the **Cc** field or click the **Address Book** icon next to the **Cc** field to select email address.

   See "How Do I Add Contacts from Address Book?" for more information.
4. To send a blind copy to a recipient, click **Bcc**. This displays the **Bcc** field. Enter the email address in the **Bcc** field.
   Optionally, click the **Address Book icon** next to the Bcc field to select an email address from the saved list.
5. Enter the subject of your Email message in the **Subject** field.
   By default, the original subject is appended with **Re:** indicating this as a reply to the original Email message.
6. Click **Options** on the top toolbar.
   The expanded Email message options are shown.
7. From the priority drop-down menu, select the required priority.
   The options are **Normal**, **Urgent**, and **Low**. By default, Email messages are sent with normal priority.
8. From the **Receipt** drop-down list, select an option.
   The options are **None**, **Read**, **Delivery**, and **Delivery** and **Read**.
9. Select the **Rich Text** check box if you want to include rich text features in the mail editor.
10. Select the **message** text box, and enter the text of the Email message.
11. Click **Send**.

How Do I Forward an Email Message?

You can forward an email by clicking the **Forward** option on the toolbar.

Use any of the following options to forward an Email message:

- **Forward as Attachment**: The forwarded Email message gets attached as a separate document. This is the default action. If you want to forward an email as an attachment, click **Forward**.
- **Forward as Inline**: The forwarded Email message gets appended to your Email message just beneath the current Email message.

To forward an opened Email message with attached files, perform the following steps:

1. In the left-side navigation panel of the **Mail** tab, click the name of the email folder that has the Email message.
2. Click **Forward** if you want to forward the email as an attachment.
   To forward the email as inline message, click the drop-down arrow next to **Forward** option. A drop-down list appears with the following options:
   - **As Attachment**: Select this option to forward the Email message as an attachment.
   - **Inline**: Select this option to append the Email message below the current Email message.

   The compose tab appears and the Email message is included based on the selection above.
3. If you have configured Convergence for multiple sender identities, select the identity that you want to use for this message by selecting an option from the **From** drop-down list. If you have not configured multiple sender identities, the **From** field does not appear. The default identity is used. For more information, see "Sender Identities".
4. Enter the email addresses of the recipients who should receive your message in the To field. Use a comma to separate multiple addresses.
   Alternatively, click **the Address Book** icon next to the **To** field to select email addresses. To send a copy to a recipient, enter the email address in the **Cc** field or click the **Address Book** icon next to the **Cc** field to select an email address.

   See "How Do I Add Contacts from Address Book?" for more information.

   To send a blind copy to a recipient, click **Bcc**. Enter the email address in the **Bcc** field. Optionally, click the **Address Book** icon next to the Bcc field to select an email address.
5. Enter the message in the message body.
6. Click **Send**.

How Do I Check Spelling in My Message?

Convergence provides the spell check option to check spelling errors in your Email message. You can perform spell check in the following languages:

- English
- German
- French
- Spanish

To spell check the Email message you composed, perform the following steps:

1. Click the **Spell Check** option on the Compose tab toolbar.

   The **Check Spelling** dialog displays all the misspelled words and suggestions.

2. Select the correct spelling from the list of suggested words (if available) based on the highlighted word.

   - **Replace**: To replace the misspelled word with the new word that is selected.
   - **Replace All**: To replace the misspelled word in all the occurrences.
   - **Ignore**: To ignore the suggestions.
   - **Ignore All**: To ignore all occurrences of this word throughout the message.
   - **Cancel**: To return to compose mail tab.
   - **Send**: To send the Email message.

How Do I Add Contacts from Address Book?

Use any of the following ways to add contacts to the To, Cc, and Bcc fields:

- Auto completion of addresses
- **Address Book** icon next to the **To**, **Cc**,and **Bcc** fields

To add a contact using the auto completion of addresses:

1. Enter the name or email address of your contact or group in the To, Cc, or Bcc fields. As you type, a drop-down list displays a list of matches. You can select the required address from the list displayed.
2. The automatic completion feature in Convergence enables you to select contact or group when you partially enter the name or email address so that, you do not need to remember the contact or group email address. The auto completion of addresses is always enabled for the Personal Address Book entries. For Convergence to provide auto completion of corporate address book entries, a server side parameter to enable corporate address book search must be set.

To add a contact using the **Address Book** icon, click the **Address Book** icon next to the **To**, **Cc**, or **Bcc** fields and add the displayed contacts from the **Add from Address Book** window to the respective **To**, **Cc**, or **Bcc** fields.

How Do I Attach a File to an Email Message?

You can attach one or more files to an Email message.

To attach one or more files to an Email message, do one of the following:

- From your desktop or an explorer window, drag one or more files into an Email message that you are composing.
- In an Email message that you are composing, click the **Attach** option.
  A dialog box appears.

  Select one or more files and click **Open**.

Shift+Click or Ctrl+Click (Command+Click on a Mac) to select multiple files at a time.

How Do I Ask For a Return Receipt When I Send an Email Message?

1. When you compose your Email message, click **Options** in the top toolbar.

The expanded message icons are shown.

2. From the **Receipt:** drop-down menu, select the type of return receipt that you want to request.

   The drop-down menu displays the following options:

   - **None**: No receipt is returned.
   - **Read**: Receipt is returned when the message is read.
   - **Delivery**: Receipt is returned when the message is delivered.
   - **Delivery and Read**: Receipt is returned when the message is both delivered and read.

When your recipients receive your Email message, they are asked to verify that they have read it.

How Do I Respond To an Email Message That Asks For a Return Receipt?

When you receive an Email message requesting a return receipt, your incoming Email message displays a **Sender Requests Read Receipt** notice.

Click **Confirm** to verify the return receipt. Convergence notifies the sender that you have read the Email message.

Click **Cancel** to disregard the request.

After you select a response, the **Sender Requests Read Receipt** notice goes away.

Searching Email messages

This topic answers your questions about how to search and refine your search for your Email messages and attachments.

You can specify search criteria and keywords to locate a specific Email message. For example, you can search for an Email message by any of its attributes or by all of its attributes.

You can perform the following search tasks:

- Search for an Email message
- Refine Search

How Do I Search For an Email Message?

You can search for an Email message in any of your mail folders or your inbox:

To do a quick search:

1. Select **Inbox** or a folder in which to search.
2. In the **Quick Search** field, click the down arrow to select your search criteria:
   - **All Attributes**: Searches all the attributes listed below. This is the default search criteria.
   - **Subject**: Searches only the subject line of your Email messages.
   - **Sender**: Searches only the sender name and email address of your Email messages.
   - **To or CC**: Searches the recipient names and email addresses (specified in the **To** and **CC** fields) of your Email messages.

- **Subject or Sender**: Searches the subject line and searches the sender name and email address of your Email messages.
- **Body**: Searches the text inside the body of your Email messages.

3. In the **Quick Search** field, enter the text for which you want to search.
   Email messages in the folder or Inbox are filtered as you enter text that matches the search criteria.

To do an advanced search:

1. Select your inbox or a folder in which to search.
2. In the **Quick Search** field, click the down arrow and select **Advanced Search**. The **Advanced Search** tab appears.
3. To select another search location, click **Select** next to the **In** field.
   The **Select** window appears with a list of folders available in your Inbox.
   a. Select the folder from which you want to search Email messages.
   b. Click **OK**.
4. Select the matching criteria for your search string by selecting any one of the following options:
   - **Match all of the following**
   - **Match any of the following**
5. Select the required option from the first drop-down list in the pane below. The following options are available:
   - **From**
   - **Subject**
   - **To**
   - **Cc**
   - **To or Cc**
   - **Date**
   - **Body**
   - **Email message Size (KB)**
   - **Age in Days**
   - **Status**
6. Select the required option from the second drop-down list.
   This option provided in this drop-down list depends on the selection in the previous step.
7. Enter a relevant search string for the Email message in the adjacent text field.
   To enter a date, click in the text field. A mini calendar appears and you can select a date. By default, the calendar displays the current month.

   You can add more conditions by clicking plus provided adjacent to the first condition. Alternatively, you can also remove search conditions by clicking minus adjacent to each search condition. You must have at least one condition to search Email messages.
8. Click **Search**.
   In two-pane layout, all Email messages in the selected folder satisfying the search criteria are displayed in the **Search Results** tab.

In three-pane layout, all Email messages in the selected folder satisfying the search criteria are displayed in the mail listing pane.

Managing Email Messages

This topic answers your questions about how to manage your Email messages:

- What Actions Can I Perform on My Email Message(s)?
- Mail Quota
- Managing Spam Email Messages
- How Do I Delete an Email Message?
- How Do I Print an Email message?

What Actions Can I Perform on My Email Message(s)?

You can perform the following actions on an Email message. These actions can be performed either by right-clicking the Email messages or by clicking the available options on the message toolbar:

- **Open**: To open an Email message, double-click the Email message or right-click the Email Message and select the **Open** action.
- **Reply**: To reply to the sender of the Email message click **Reply** from the message toolbar or right-click the Email Message and select the **Reply** action.
- **Reply All**: To reply to all the recipients of the Email message, click the downward arrow next to the **Reply** and select **Reply All** or right-click the Email Message and select the **Reply All** action.
- **Forward**: To forward the selected Email message, right-click the Email message and select **Forward** from the drop-down list. A new compose Email message tab appears and the Email message is included as an attachment. The Email message is forwarded as an attachment.
  You can also click the downward arrow provided next to **Forward** on the mail toolbar. A drop-down list appears with the following options:
  - **As attachment**: Select this option if you want to forward the Email message as an attachment. A new compose message tab appears and the Email message is included as an attachment.
  - **Inline**: Select this option if you want to forward the Email message as an inline Email message. A new compose message tab appears and the Email message is included in the body of the new Email message.
    By default, when you click **Forward**, the Email message is forwarded as an attachment.
- **Delete**: To delete this Email message, right-click the Email message and select **Delete** from the drop-down list. Alternatively,
  - Select the Email message and click **Delete** on the message toolbar in two-pane layout.
  - Select the Email message and click **Delete** on the message listing toolbar in three-pane layout. Alternatively, Select the Email message and click **Delete** on the message toolbar in three-pane layout.
- **Mark**: The following options are available:

> **Note:**
>
> The options under the mark option are toggled. For example, if the Email message you selected has been already read or flagged, you are able to mark it as unread or unflagged only.

- **As Unread**: This option will mark the Email message as Unread. To mark an Email message as Unread, right-click the Email message and select **As Unread** from the Mark drop-down list. The Email message is listed as an unread Email message. To mark it as a Read Email message, select the Email message and mark it as **Read**. Alternatively,
  - You can read the Email message by clicking it and the Email message is automatically marked as Read.
  - You can mark the Email messages as Read/Unread by a single click under the Read/Unread status column in message grid.
- **As Flagged**: You can flag Email messages that are important and that need to be referred in the future. Right-click the Email message and select **As Flagged** from the Mark drop-down menu. A red flag appears in the last column of default folder view, indicating that this Email message is flagged. To unflag an Email message, select this Email message and choose the **As Unflagged** Email message action. Alternatively, you can mark an Email message as Flagged/Unflagged by clicking the Email message under the Flag column on message grid.
- **As Spam**: Mark a Email message as spam or not spam. You must have spam filters enabled by your system Administrator. When you mark an Email message as spam, the Email message is moved into the designated spam folder. For more information on how to work with Spam Email messages, see "Managing Spam Email Messages". You can also mark an Email message as **Spam** or **Not Spam** by clicking the mail toolbar.

- **Select All**: To select all Email messages in the folder. To select all Email messages in a folder, right-click the Email message and select the **Select All** action from the drop-down list. Alternatively, click the **Select All** check box from the mail grid header. Clear the check box to cancel the selection.
  You normally select all Email messages if you want to perform a common task for all your Email messages in the folder.

> **Note:**
>
> To select more than one Email message when performing an action, hold the Ctrl key on the keyboard and select the required Email messages and left-click the mouse.

- **Move to folder**: To move your Email messages to other folders in your mailbox. This option is also available when you click the downward arrow next to **Move** on the message toolbar.

  You can move Email messages in the following ways:
  - Right-click the Email message or Email messages, and select the **Move to Folder** action from the drop-down list. When this action is selected, the **Move Message** window appears with the folder hierarchy of your Inbox. Select the folder that you want to move the Email message(s) to and click **OK**.

  - Select the Email messages and click **Move** from the message toolbar. A drop-down list appears with the following options:
    * **Move to Folder**: Select this option to move your Email messages to a specified folder.
    * **Copy to Folder**: Select this option to copy your Email message to a specific folder.
  - Drag and drop the selected Email messages into the folder you want to move the Email messages.
- **Copy to folder**: Use this option to copy Email messages to other folders in your Inbox. Right-click the Email message(s) and select the **Copy to Folder** action; the **Copy Message** window appears with all the folders available in the Inbox. Select the folder to where you want to copy the selected Email messages, and click **OK.** Alternatively, copy Email message(s) by clicking the downward arrow next to **Move** from the message toolbar and choosing the **Copy to Folder** option.
- **Print**: To print an Email message. You can print an Email message by clicking on **Print** from the message toolbar. Alternatively, right-click the Email message and select **Print** from the drop-down list.
- **Other**

> **Note:**
>
> The following actions can only be performed by right-clicking the Email message. Right click the Email message and select **Other** from the drop-down list.

  - **Add Sender to Address Book**: Adds the email address of the sender to the contact list.
  - **Create Event From Message**: Enables you to create an event from the Email message.
  - **Create Task From Message**: Enables you to create a task from the Email message.
  - **Display Full headers**: Displays the complete header information of the Email message.
  - **Find messages from this Sender**: Enables you to search the Email messages from the sender of the current Email message. When this action is selected, the **Advanced Search** window appears. For more information on searching Email messages, see "Searching Email messages".
- **Expunge**: To delete the selected Email message permanently:
  - Select the Email message and click **Expunge** on the message toolbar in two-pane layout.
  - Select the Email message and click **Expunge** on the message listing toolbar in three-pane layout.

Select the **Select All** option to perform a common task for all your Email messages in the folder.

To select more than one Email message when performing an action, use the check box option. Select the check box next to the Email message to select an Email message and deselect the check box to cancel the selection.

To select multiple Email messages:

1. Select the check box next to the Email messages that you want to select.
   The selected Email messages are highlighted.
2. Perform the desired operation. For example, if you want to delete the selected Email messages, click **Delete**, or right-click the Email messages and select the **Delete** option from the list.

Alternatively, you can select more than one Email message in one of the following ways:

- Press CTRL key + click the Email message (to select non continuous Email messages)
- Press SHIFT key + click the Email message (to select a continuous range of Email messages)
  The check boxes get selected and you can perform the desired operation.

Mail Quota

Administrators set a quota for your mailbox. You can view the quota information only if the Administrator sets a quota limit for you. The quota set for a user is based on the disk space or number of mails that the Inbox can store. An Administrator can also set quota for each mail folder in your Inbox. The mail quota for your Inbox depends on two criteria.

- The disk space used.
- The number of email that you can store.

The quota is exhausted if any one of the two criteria is satisfied, which ever occurs first. For example, if the Administrator has set a limit of 2000 mails and a storage of 2048 mega bytes; and if you have exhausted the 2000 mails limit but still have about 20 MB of disk space, your quota is exhausted.

If your Administrator has set a quota for you, a summary of the quota used is available under the Messages toolbar in the form of a bar chart. The threshold limit is indicated by a red color bar chart.

> **Note:**
>
> The color schemes are customizable. By default, the threshold limit is indicated by a red color bar chart.

The threshold limit is set by the Administrator.

This topic contains the following sections:

- How Do I View my Overall Mail Quota Information?
- How Can I Check my Mail Quota Usage for a Particular Folder?

How Do I View my Overall Mail Quota Information?

To view the overall mail quota information, perform the following steps:

1. In two-pane layout, Right-click on the Convergence mail account node (denoted by user@domainname) from the left navigation panel. Tap the **Tools** icon. Select **Folder Properties** from the drop-down list.

   In three-pane layout, select the Convergence mail account node (denoted by *user @domainname*) from the left navigation panel. Select **Folder Properties or Sharing** from the **Folder Actions** drop-down list above the folder list and click **Folder Properties**.

2. The **Quota Information** window opens with the following mail quota information:
   - **Storage use**: A status bar that shows the storage utilized. The storage used information is available in terms of actual usage and the percentage of the quota used.
   - **Messages stored**: A status bar that shows the number of Email messages stored in your mailbox. The Email messages stored information is available both in terms of number of Email messages as well as the percentage of the quota used.
3. Click **OK** to close.

How Can I Check my Mail Quota Usage for a Particular Folder?

To check the mail quota usage for a particular folder in your mailbox, perform the following steps:

1. In two-pane layout, select the folder to check the quota usage and click **Folder Properties** from the mail toolbar.
   In three-pane layout, select the folder to check the quota usage and select **Folder Properties or Sharing** from the **Folder Actions** drop-down list above the folder list and click **Folder Properties.**

   Alternatively, right-click the folder to check the quota usage and select **Folder Properties** from the drop-down list of options.

   The **Folder Properties** dialog box appears and displays the folder properties:
   - **Folder Name**: The folder name for which the quota information is being displayed.
   - **Storage Use**: The storage used appears in the form of a bar chart:
     – Total storage used: A large shaded portion in the bar graph shows the total amount of quota used by all the folders. The overall mail quota.
     – Storage used by this folder: A smaller shaded portion in the bar graph indicates the amount of disk space in the selected folder.
   - **Messages Stored**: A status bar that shows the number of messages stored in your mailbox.
     – Total number of messages: A large shaded portion in the bar graph shows the total number of Email messages in all folders.
     – Number of messages in this folder: A smaller shaded portion in the bar graph indicates the number of Email messages in the selected folder.
2. Click **OK**.

Managing Spam Email Messages

Spam Email messages are unsolicited bulk Email messages that you receive in your mailbox.

If your mail Administrator configures the mail server with a spam filter, Email messages that the filter identifies as spam are moved to a designated spam folder. The spam filter bases its decisions by comparing with known spam Email messages. To help the spam filter improve the comparison process, mark spam Email messages that the filter misses as spam and mark incorrectly identified spam Email messages as not spam. If spam is configured, a **Spam** folder is created and made available as a system folder.

For more information, see the following topic:

- How Do I Mark a Message as Spam or Not Spam?

How Do I Mark a Message as Spam or Not Spam?

To mark a message as spam, select the message and click **Spam** from the Messages toolbar.

If a message is marked as spam and you think the message is incorrectly marked, mark the message as **Not Spam** by clicking **Not Spam** on the mail toolbar. All messages that are marked as spam are moved to a folder that the Administrator designates as spam folder.

Alternatively, you can also mark the message as not a spam from the context menu. To do this:

1. Right-click the message.
2. Select **Mark** from the context menu options.
3. Select **As Not Spam**.
   The selected message is moved back into its designated folder (for example: Inbox).

How Do I Delete an Email Message?

You can delete a single Email message or multiple Email messages at a time.

To delete an Email message:

1. Select the Email message that you want to delete.
2. Click **Delete** on the message toolbar to delete the selected Email message.
   Alternatively, right-click the Email message and select **Delete** from the context menu to delete the Email message.

   Also, press the **Delete** key on your keyboard to delete the selected Email message.

To delete multiple Email messages, perform the following steps:

1. Press the Control key and select all the Email messages that you want to delete.
2. Click **Delete** on the message toolbar in two-pane layout.
   Click **Delete** on the message listing toolbar in three-pane layout. Alternatively, Select the Email message and click **Delete** on the message toolbar in three-pane layout.

   Alternatively, right-click the Email message and select **Delete** from the context menu.

How Do I Print an Email message?

You can print an Email message in the following ways:

1. Select the Email message that you want to print.
2. Click **Print** on the message toolbar.
   Or

   Right-click the Email message. A drop-down list appears. Select **Print** from the drop-down list to print a Email message.
3. A window appears showing a preview of the Email message when printed.
   The print dialog box appears based on your print settings.
4. Click **Print**.

Working with Attachments

You can receive files attached to the Email messages. See the following topics:

- How Do I View a File Attached to an Email message?
- How Do I Save a File Attached to an Email message?

You can attach and send multiple files in an email. When you specify a file to attach, a copy of the file is attached to the email. See "How Do I Attach a File to an Email Message?" for more information.

The size of the files that you attach to an email depends on the size limit set for sending attachments. Contact your Administrator for information about the file size limit. The Administrator can configure the total size of your outgoing email including the attachment.

How Do I View a File Attached to an Email message?

Convergence can display several types of files attached to your Email messages.

You can download files that you cannot view and open them with an application on your computer. See "How Do I Save a File Attached to an Email message?" for more information.

By default, Convergence can display TXT, GIF and JPG files. If your browser is installed with a PDF plugin, Convergence can also display PDF files. Depending on how your system is configured, Convergence can also display other types of files. Ask your system administrator which kinds of files can be viewed in Convergence.

To view a file attached to an Email message:

1. Select or open an Email message that has an attachment.
   In two-pane layout, the Email message appears, either in the reading pane or in a new tab.

   In three-pane layout, the Email message appears in a new tab in the message view area.

   Attachments are listed between the subject line and email body.
2. Click the attachment you want to view.
3. From the pop-up menu, select **View Attachment**.
   Convergence displays the attachment in a new tab.

In the new tab, you can perform the following actions on an attachment you are viewing:

- Click **Save** to download the file to your computer.
- Click **Send** to create a blank email with the attachment already attached. The blank email appears in a new **Compose** tab in the work area. See "How Do I Compose and Send a New Email Message?" for more information about the **Compose** tab.
- Depending on the type of file, the type of browser you are using, and the type of plugins installed, you may also be able to print the attachment, zoom in and out, view the attachment in fullscreen mode, and search for text in the attachment.

How Do I Save a File Attached to an Email message?

You can save files that are attached to Email messages you receive. When you save an attachment, it is downloaded to your computer.

To save an attachment:

1. From your inbox, select or open an Email message that has an attachment.
   In two-pane layout, the Email message appears, either in the reading pane or in a new tab.

   In three-pane layout, the Email message appears in a new tab in the message view area.

   Attachments are listed between the subject line and email body.

2. Click the attachment you want to download.
3. From the pop-up menu, click **Save**.

The file is downloaded according to the way your browser is configured. For example, your browser may be configured to automatically download files to a specific folder, or your browser may be configured to prompt you for a download location and file name.

Sorting Email messages

By default, Email messages within a folder are sorted with the latest Email message at the top and oldest Email message at the bottom of the folder. You can change the order of the Email messages in the folder.

For more information, see the following topic:

- How Do I Sort Email messages?

How Do I Sort Email messages?

To sort Email messages in a folder, perform the following steps:

1. Decide how you want your Email messages to be displayed.
   You can display the Email messages in the ascending or descending order. You can sort the Email messages in any of the following order:
   - By the date Received or Sent
   - By the sender name, displayed as From
   - By the Email message Size, Subject, or Priority
   - By the read or unread status, or flag status
   - By the presence of Attachments
2. Select the required folder.
3. In two-pane layout, click any one of the following option that corresponds to your choice. In three-pane layout, any of the following option that corresponds to your choice can be selected from the drop-down list in the message listing toolbar and the selected option is displayed along with Up/Down arrow denoting ascending/descending order.
   - **From**: Displays Email messages alphabetically by the name of the sender. Click **From** to sort Email messages in the reverse alphabetical order.
   - **Size**: Sorts the Email messages by size in the ascending order. Click **Size** again to sort the Email messages in the descending order.
   - **Subject**: Sorts Email messages alphabetically by each Email message subject text on the **Subject** line. Click **Subject** again to sort Email messages in the reverse alphabetical order.
   - **Read Status**: Separates unread and read Email messages, followed by Email messages that you have forwarded, replied to, deleted (read or unread), or replied to and deleted.
   - **Date: Sorts messages by date**. By default, the latest Email message appears first. Click **Received** or Sent again to display the oldest Email messages first. The Date format setting that you select in the Options tab determines the format of the date.

Managing Folders

This topic answers your questions about how to create folders, delete folders, and subscribe to folders.

- How Do I Create a Folder?
- How Do I Rename a Folder?
- How Do I Delete a Folder?
- Sharing and Subscribing to Mail Folders

How Do I Delete a Folder?

To delete a folder, do the following:

Click the folder you want to delete and drag it to the **Trash** folder.

Or:

1. Right-click the folder.
2. Click **Delete Folder** from the menu.
3. Confirm that you really do want to get rid of the folder by clicking **OK** in the **Delete Folder** dialog box.

Or:

1. Select the folder.
2. Click the **Delete Folder** icon above the folder list on the left-side navigation panel in two-pane layout.
   Click **Delete Folder from the Folder Actions** drop-down list above the folder list on the left-side navigation panel in three-pane layout.
3. Confirm that you really want to delete the folder by clicking **OK** in the **Delete Folder** dialog box.

Your deleted folder is now a subfolder inside the **Trash** folder.

How Do I Create a Folder?

The **Inbox**, **Drafts**, **Sent**, **Trash**, and **Spam** are system folders and cannot be created or deleted.

To create a new folder:

1. Click the **Create or Subscribe to a Folder** icon above the folder list on the left-side navigation panel in two-pane layout.
   Click **Create or Subscribe to a Folder from the Folder Actions** drop-down list above the folder list on the left-side navigation panel in three-pane layout.

   A drop-down list appears.
2. Select **New Folder** from the drop-down list.
   The **Create Mail Folder** dialog box appears.
3. Enter a name for the folder in the **New folder name** field and click **OK**.
   An empty new folder with the entered name is created below the System Folder. New folders are created in alphabetical order below system folders.

You can also create a **subfolder** within another folder. For example, you have a folder named **Vacations.**

To create a new folder named **Hotels** within the **Vacations** folder, perform the following steps:

1. Click the existing folder. **Vacations** for example to highlight it.
2. Click **New Folder** icon above the folder list on the left-side navigation panel in two-pane layout.
   Click **Create or Subscribe to a Folder from the Folder Actions** drop-down list above the folder list on the left-side navigation panel in three-pane layout. Select **New Folder** from the drop-down list.

   Alternatively, right-click the selected folder and click **New Folder**.
3. Type **Hotels** as a name for the new folder and press Enter.
   The new folder **Hotels** appears in that list of subfolders.

   Alternatively, you can create a folder while performing other operations such as moving an Email message to another folder, setting vacation response, or mail filters.

To create a folder while performing other operations:

1. Click **New Folder** that appears at the lower left-side corner of the operation dialog box.
   A text field appears.
2. Enter the name of the folder you want to create.
3. Press the Enter key on the keyboard, or click anywhere within the dialog box.
   The default location is the main tree under which the new folder is created. To create subfolder, place the cursor on the folder under which you want to create a new folder.

Press the Esc key to cancel the new folder creation. To rename or delete the folder, right-click the folder in the dialog and select **Rename Folder** or **Delete Folder** from the list.

How Do I Rename a Folder?

To rename a folder, do the following:

1. Click the **Rename Folder** icon above the folder list on the left-side navigation panel in two-pane layout.
   Click **Rename Folder from the Folder Actions** drop-down list above the folder list on the left-side navigation panel in three-pane layout.

   The **Rename Folder** dialog box appears.
2. Enter your new name for the folder and click **Rename Folder**.
   The folder is renamed to the new name.

Alternatively, you can rename a folder by right-clicking the folder that you want to rename and select **Rename Folder**.

Sharing and Subscribing to Mail Folders

Convergence enables you to create a shared folder and subscribe to the shared folders of other users.

See these topics to perform the following tasks:

- How Do I Share Mail Folders with Other Users?
- How Do I Subscribe to a Shared Folder?
- How Do I Unsubscribe From a Shared Folder?

How Do I Share Mail Folders with Other Users?

You can share your mail folders with other users. You can also specify the level of sharing you want to provide on the shared folders. For example, you can grant a user with only read privileges and grant the other users permissions to write or create subfolders in your shared folder.

To share an Email message folder, perform the following steps:

1. Right-click the mail folder that you want to share.
2. Select **Share Folder** from the drop-down list.
   The **Share Folder** window appears.
   - Select the **Allow direct delivery to this folder** check box if you want users to send an email to the shared folder directly. The format of the email address or userID is provided.
   - **User**: Click the Address Book icon and choose a user to set access permissions.
   - **Access Permissions**: You can assign the following permissions:
     – **None**: Indicates that the mail folder cannot be shared. Select this option if you do not want to share your mail folder with the other users.
     – **Read**: Enables you to only view Email messages in the shared folder.
     – **Read+Write**: Enables you to move Email messages from folders to subfolders and delete Email messages.

   Click plus or minus at the end of each row to add or remove users to share your folder.
3. Click **Save**.

How Do I Subscribe to a Shared Folder?

To subscribe to a shared folder, perform the following steps:

1. Click the **Create or Subscribe to a Folder** icon above the folder list on the left-side navigation panel in two-pane layout.
   Click **Create or Subscribe to a Folder from the Folder Actions** drop-down list above the folder list on the left-side navigation panel in three-pane layout.

   A drop-down list appears.
2. Select **Subscribe to Folder** from the drop-down list.
   The **Subscribe to Shared Folders** window appears. This window contains two panes. The left pane contains a list of all the users who have shared their folders, and the right pane contains the folders shared by each user. The left pane lists users with shared folders.
   - Click the **All Users** option on the left pane to display all users with shared folders.
   - To select an individual's shared folders, click the user's UserID or email address. You can also find a shared folder by typing the name of the folder in the search text area on the right pane.
     The right pane provides the following information about a shared folder.
     – **Folder Name**: Name of the shared folder.
     – **Owner**: Owner of the shared folder.
3. Select the folders to subscribe by selecting the corresponding checkbox.

4. Click **Subscribe**.
   The shared folders that you subscribe are added to the **Subscribed Folders** list in the Messages view.

How Do I Unsubscribe From a Shared Folder?

To unsubscribe from a shared folder perform the following steps:

1. Click the **Folder Properties or Sharing** icon above the folder list on the left-side navigation panel in two-pane layout.
   Click **Folder Properties or Sharing from the Folder Actions** drop-down list above the folder list on the left-side navigation panel in three-pane layout.

   A drop-down list appears.
2. Select **Unsubscribe** from the drop-down list.
   The **Unsubscribe Folder** dialog box appears. Click **OK** to unsubscribe from the shared folder.

Alternatively, you can unsubscribe from a shared folder by right-clicking the folder and select **Unsubscribe**.

Sending and Receiving SMS Messages

This topic describes SMS messaging and answers your questions about how to send and read SMS messages:

- What Is SMS?
- Is One-way SMS Enabled for Convergence?
- How Do I Compose and Send an SMS Message?
- What Actions Can I Perform on SMS Messages?
- What Happens When SMS Messages Cannot Be Delivered?

What Is SMS?

SMS (short message service) is a method of communication that lets you to send short messages via phone, computer, or other mobile devices. In Convergence, the Mail tab optionally lets you to send and/or receive SMS text messages, provided this functionality is set up at your site.

Is One-way SMS Enabled for Convergence?

To determine if one-way SMS is enabled for Convergence, check the following characteristics of each Convergence SMS type:

One-way SMS in Convergence:

- You are able to send SMS messages but unable to receive SMS messages
- There is no SMS system folder in **Mail**

How Do I Compose and Send an SMS Message?

To **Compose** an SMS message, use any of these options within the Convergence UI:

- **Quick Actions**: Click the **New SMS** icon in the Quick Actions menu in the upper-left corner of the Convergence UI in two-pane layout. Select the **New SMS** option from the **New Mail** drop-down list in the upper-left corner of the Convergence UI in three-pane layout.
- **SMS folder:** Click **New message** in the **SMS tab** of the SMS folder in the Mail pane.
- **Address Book**: Click a contact's phone number; a drop-down menu appears. Select **Send SMS Message**. See "How Do I Send SMS (Short Message Service) Messages through Address Book?".
- **Calendar:** If you receive a calendar notification in your Inbox, you can send the sender a message from the sender drop-down menu: **Send <Sender Name> an SMS Message...**

A **New SMS message** window appears consisting of the following parts:

- **Phone Number or Contact Name**. Enter your Contact's name or Phone number where your contact can receive SMS messages. As you enter the contact name or phone number, Convergence searches your Personal Address Book and/or Corporate Directory for that contact or number and adds it to the **Phone Number or Contact Name**.
- **Message Area**. Enter a message. When completed, click **Send**.

What Actions Can I Perform on SMS Messages?

SMS Messages are listed in the **SMS messages** tab that displays when you click the **SMS** folder on the **Messages** pane. New SMS messages are highlighted in the SMS messages tab. The following features are available on the SMS messages tab:

- **New Message.** Opens a New SMS message. To send SMS messages, see "How Do I Compose and Send an SMS Message?".
- **Reply.** Click an SMS message in the SMS messages tab and click **Reply**. An **SMS Message to <SMS number>** or **<Contact>** displays.
- **Delete**. In the SMS messages tab, click the SMS message that you want to delete; then click **Delete**. Alternatively, you can hover over the SMS message and click the delete icon at the end of the message.
- **Search** bar. On the top right corner of the SMS Message tab, use the **Search** bar to find specific SMS Messages. Use the magnifying glass icon to change the search criteria: you can search by **To or from phone number, From phone number,** or **Message text.**
- **Show this conversation.** Click an SMS message in the SMS messages tab and click **Show this conversation**. Alternately, right-click a message and select **Show this conversation**.

What Happens When SMS Messages Cannot Be Delivered?

When an SMS message cannot be delivered, Convergence alerts you in the following way:

One-way SMS: You see a Non Delivery Notification (NDN) as a regular email in your INBOX. The email is badged to indicate that it is an NDN related to an SMS message.

3
Address Book

An address book is a collection of contacts, groups, and contact information.

Convergence includes the following address books:

- **Corporate address book**: An address book containing the contact information of the members and groups of your organization. The corporate address book contact information is taken from the directory server and cannot be modified in Convergence. In the Convergence UI, the corporate address book is called the **Corporate Directory**. See "About the Corporate Address Book" for more information.
- **Personal address book**: One or more address books that you create and maintain to contain contact information for personal contacts. See "About Personal Address Books" for more information.
- **Collected addresses address book**: An address book created by Convergence to collect email addresses that are not in your personal or corporate address books. See "How Do I Set the General Preferences in Mail?" for information about enabling or disabling the collected addresses address book. Each time you send an email to a recipient that is not in your personal or corporate address book, Convergence stores the email address in the collected addresses address book so that Convergence can auto-complete the email address the next time you write to the same address. See "About the Collected Addresses Address Book" for more information.

About the Corporate Address Book

The corporate address book contains the contact information of the members and groups of your organization. The corporate address book contact information is taken from the directory server and cannot be modified in Convergence. In the Convergence UI, the corporate address book is called the **Corporate Directory**.

When working with the corporate address book, you can do the following:

- How Do I Search for a Contact?
- How Do I Copy Contacts From One Address Book to Another?
- How Do I Send an Email Message to One or More Contacts From the Corporate Directory?
- How Do I Schedule an Event With One or More Contact In the Corporate Directory?
- How Do I Print Contacts or a Group?
- How Do I Export My Contacts?

How Do I Search for a Contact?

You can search for contacts in the corporate address book, your personal address books, or the collected addresses address book.

To search for a contact:

1. Click the address book in which you want to search.

A column showing all the contacts in that address book appears.

You can search a contact based on the following criteria:

- **Display Name**
- **Email Address**
- **First Name**
- **Last Name**
- **Phone Number**

> **Note:**
>
> By default, the search is performed on the display name.

2. Enter the string that you think would be the best way to find your contact in the text area provided and press enter. All the contacts that match the search criteria appear.

> **Note:**
>
> Convergence treats any entered search string as a 'starts with' search in the Corporate Address Book. For example, if a user enters foo, results beginning with foo are listed.
> In addition, you can add the asterisk * in a search string (for example, *foo ,which allows you to do a wildcard search for a "contains search" or "substring-any" search.

How Do I Copy Contacts From One Address Book to Another?

You can copy contacts from any of your address books into a personal address book. You cannot copy contacts into the corporate address book or the collected addresses address book.

To copy a contact to a personal address book:

1. From any of your address books, find the contact you want to copy.
   See "How Do I Search for a Contact?" for more information.
2. From the address book toolbar, select **Copy to**.
3. From the context menu, select the personal address book into which you want to copy the contact.

How Do I Send an Email Message to One or More Contacts From the Corporate Directory?

To send an email message to one or more contacts from the corporate directory, perform the following steps:

1. Search the contact from the corporate directory. See "How Do I Search for a Contact?" To send the email message to multiple contacts, select the contacts by following the steps described in the section "What Actions Can I Perform on Contacts From My Address Book?"

2. Click **Compose Mail To** on the **Corporate Directory Lookup** toolbar. Alternatively, right-click the contact and select **Compose Mail To...** from the drop-down list. A new tab titled **No Subject** is created and the contact's email address is added in the **To** field.
3. Enter the message in the compose editor and click **Send**.

How Do I Schedule an Event With One or More Contact In the Corporate Directory?

To schedule an event with a contact in the corporate directory, perform the following steps:

1. Search the contact from the corporate directory. See How Do I Search for Contacts in the Corporate Directory? To schedule the event with multiple contacts, select the contacts using the steps described in the section "What Actions Can I Perform on Contacts From My Address Book?"
2. Right-click the selection and select **Invite To a New Event...** from the drop-down list. A **New Event** tab is created with the contact added to the invitation list. For more details about how to create a new event, see "How Do I Create an Event?"
3. Specify other attributes for the event and click **Save**.

How Do I Print Contacts or a Group?

To print contacts or a group of contacts:

1. Click the address book that contains the contact or group you want to print.
2. Do one of the following:
   - Select a group.
   - Select one or more contacts using the Shift or CTRL keys on your keyboard.
3. Do one of the following:
   - Right-click your selection and select **Print**.
   - From the address book toolbar, select **Print**. To print the selected contacts, select **Print Selected** from the context menu. To print a group, select **Print all in list** from the context menu.

   A new browser tab or window appears displaying your print selection.
4. User your browser printer features to print the contents of your print selection.

How Do I Export My Contacts?

You can export your contacts from Convergence. For example, you could export contacts from Convergence so that you can import them into another application. You do not have to manually enter each contact in your new application.

Convergence can export as **CSV** and **vCard 3.0**. Depending on how your system is set up, Convergence may also be able to export as **LDIF** and **vCard 2.1**. Ask your system administrator which additional formats are supported.

To export contacts:

1. Select the address book from which you want to export the contacts.
2. You can export contacts in two ways.

- Export all contacts in the selected address book.
- Select a subset of contacts from the address book.

To export all contacts in the address book:

a. Click **Import/Export** icon on the address book toolbar in the left pane in two-pane layout and select **Export**.

b. Click **Import/Export from the Actions** drop-down list on the address book toolbar in the left pane in three-pane layout and select **Export**.

To export selected contacts:

a. Select the contacts by clicking the check box next to the contact or by pressing the Ctrl key (command key for Mac OS users) for nonsequential contacts or use the Shift key for sequential contacts.

b. Right-click on the selected list.

c. Select **Export** from the context menu.

The **Export Contacts from Address Book** dialog box appears and the default export format is selected.

3. Select the format in which you want to export your contacts. If you have selected contacts from the address book, the following options are available.
   - **Export All**: Select this option to export all address book entries.
   - **Export Selected**: Select this option to export the selected entries.
4. Click **Export Contacts** to export the contact to the selected format. The contacts are exported in the chosen format and an operating system dialog box appears prompting you to store your entries.

About Personal Address Books

A personal address book is an address book you create and maintain to contain contact information for personal contacts.

When working with personal address books, you can do the following:

- How Do I Create an Address Book?
- How Do I Add a Contact?
- How Do I Copy Contacts From One Address Book to Another?
- How Do I Edit a Contact?
- How Do I Delete One or More Contacts From My Address Book?
- How Do I Find an Address Location with Google Maps?
- What Actions Can I Perform on Contacts From My Address Book?
- How Do I Search for a Contact?
- How Do I Sort Contacts?
- How Do I Print Contacts or a Group?
- How Do I Import Contacts That I Have Stored in Other Applications?
- How Do I Export My Contacts?
- Creating and Managing Contact Groups

How Do I Create an Address Book?

You can create user-defined address book and add groups or contacts to it.

To create a book:

1. In the quick actions toolbar, click the **New Address Book** icon on the left pane in two-pane layout. Select **New Address Book** from the **Actions** drop-down list in the left pane in three-pane layout. A **New Address Book** dialog box appears.
2. Enter a name for the book in the text box.
3. Click **Save**. The newly created address book appears above the Corporate Directory in the left navigation pane.

Select the Address Book and create groups within the book or add contacts to the address book.

How Do I Add a Contact?

To add contact:

1. Select the Address Book for which you want to add a contact.
2. To add a contact, Do one of the following:
   - Click **New Contact** icon on the left-side navigation panel in two-pane layout. Select **New Contact** from the **New Contact** drop-down list in the upper left corner of the Convergence UI in three-pane layout. The Add to Contacts dialog box appears.
   - a. Provide a first name, last name, and email address.

     b. Click **Enter More Details** to open the contact in the **New Contact** tab.
   - Click **New Contact** icon from the Address Book toolbar in two-pane layout. Select **New Contact** from the **Actions** drop-down list in the Address Book toolbar in three-pane layout. The **New Contact** tab appears.
3. Enter the following details of your contact:
   - Click the photo avatar on the left-side of this page to add a picture of your contact. A file browser appears. You can navigate to the directory that has the picture of your contact and add it. The photo is automatically cropped and resized to fit into the area provided for the picture.
   - **First Name**: Enter the first name of your contact.
   - **Last Name**: Enter the last name of your contact.
   - **Display Name**: The name to be used in Convergence for this contact. By default, this is a combination of the first and last name.
   - **Middle Name**: Enter the middle name of your contact.
   - **Company Name**: Enter the name of the organization that your contact works for.
   - **Job Title**: Enter the job title of your contact.
   - **Title**: Select a title, such as Dr or Mr.
   - **Suffix**: Select a suffix, such as Jr or Sr.
4. Enter the **Email Addresses** for your contact. The following options are available:
   - **Work**

- **Personal**
- **Other**

5. Enter the postal addresses for your contact in the **Addresses** section.

> **Note:**
>
> A hint indicating what must be entered in each field is provided in light grey. When you click in the field, the hint is removed.

The following options are available:

- **Work**
- **Home**
- **Other**

Once contact information is added and saved, you can view your contacts in view mode. After selecting a contact with address details, you hover over the **View Map** icon (located under the address in view mode) to view a Google map thumbnail image. For more information on Google maps in the Address Book, see: "How Do I Find an Address Location with Google Maps?"

6. Enter the phone numbers for your contact in the **Phone Numbers** section. The following options are available:

- **Home**
- **Work**
- **Mobile**
- **Pager**
- **Fax**
- **Other**

> **Note:**
>
> You can change the order in which the phone numbers appear when you view the contact by selecting the fields from the drop-down list.

7. Enter the instant messaging information for your contact in the Instant Messaging field. The following options are available:

- **SunIM**
- **AIM**
- **Jabber**
- **MSN**
- **Yahoo**
- **.Mac**
- **Other**

Depending on how the address book in configured on the server, you can add up to five instant messaging IDs. Ask your administrator how many IDs you can add for each of your contacts.

8. You can enter other information related to your contact from the **Other Information** drop-down list. The following options are available:
   - **Nickname**
   - **Birthday**
   - **Anniversary**
   - **Other**
   - **Calendar URL**
   - **Availability URL**
   - **Web Address 1**
   - **Web Address 2**

   For birthdays and anniversaries, you can specify a date using the calendar icon or by entering a date string in the text field (for example, "May 11").
9. You can add notes regarding your contacts under the **Notes** section.
10. Click **Save**. Optionally, press the Enter key on the keyboard to save the content.

After adding the contact, all details that you have entered for the contact appear in the view mode. Also, only the information filled out is shown in the view mode.

How Do I Copy Contacts From One Address Book to Another?

You can copy contacts from any of your address books into a personal address book. You cannot copy contacts into the corporate address book or the collected addresses address book.

To copy a contact to a personal address book:

1. From any of your address books, find the contact you want to copy.
   See "How Do I Search for a Contact?" for more information.
2. From the address book toolbar, select **Copy to**.
3. From the context menu, select the personal address book into which you want to copy the contact.

How Do I Edit a Contact?

You can edit the contact information for contacts in your personal address books or the collected addresses address book.

To edit a contact:

1. Select the address book containing the contact information you want to edit.
2. Search for and select the contact whose contact information you want to edit.
   The contact's information appears.
3. Click **Edit**.
   A new tab appears that shows the information for the contact.
4. Edit or add the required information for the contact in the corresponding field.

5. Click **Save**.

   After editing the contact, all details that you have provided for the contact appear in the view mode.

How Do I Delete One or More Contacts From My Address Book?

To delete one or more contacts from your address book, perform the following steps:

1. Select the contacts to delete by selecting the check box next to the contact from the address book. You can select multiple contacts by pressing the Ctrl key on your Windows keyboard (or Command key if you use Mac OS) for selecting non-sequential contacts or the Shift key for selecting sequential contacts.
   If you select a single contact, the contact details appear in the central panel. In the case of multiple contacts, the total number of contacts selected appears in the central pane.
2. Click **Delete** displayed on the selected address book tab in the right pane.
   Alternatively:
   a. Right-click on the selected contact(s).
   b. Select **Delete**.

   A dialog box appears prompting for a confirmation.
3. Click **Delete**.

How Do I Find an Address Location with Google Maps?

If address details have been entered for any contacts in your Personal Address Book or the Corporate Address Book, you can view a Google map of the address location within the address books. To view the Google map of a contact's address, follow these steps:

1. Select the contact in Address Book.
2. If the **Addresses** section contains an address, hover over the **View Map** icon. A thumbnail view of the address location is shown in a Google map.
3. Click **View Map** icon. The map is enlarged.
4. To enter another address, delete the address in the **Search** text field at the top of the map and enter a new address. Click **Show Location**.
5. For driving directions, cycling directions, or walking directions between two locations, select **Driving Directions**, **Cycling Directions**, or **Walking Directions** from the **Search** drop-down menu at the top of the map.
   a. Enter an address in the green **A** and **B** text fields. Directions are listed in the left column of the main pane.
   b. To print directions, click **Print directions** next to the printer icon.
   c. For reverse directions, click the outward-facing arrows icon between address **A** and address **B** on the top of the map.
6. To exit from Google maps, Click **x** in the map tab(s).

What Actions Can I Perform on Contacts From My Address Book?

The address book service enables you to perform several operations on one or more contacts. For example, to send a message to multiple contacts, use the address book instead of opening the compose window in the Messages and typing the contacts manually.

The options appear when you select contacts and right-click. The options available in the right-click menu depend on the service available in your deployment. To select multiple contacts, select the check box next to the contact. You can select all contacts by selecting the check box next to Display Name at the top of the results area. You can select multiple contacts by pressing the Ctrl key on the Window keyboard (Command key for Mac OS users) to select non sequential contacts, and the Shift key to select sequential contacts.

Depending on the services included in your deployment, the following options may be available:

- **Compose Mail To:** Select this option to send an email message to the selected contacts. The compose mail tab appears in the Mail module. The selected contacts are added as recipients of the email message.
- **Invite to a New Event**: Select this option to create an event with the contacts as invitees. The **New Event** window appears in the Calendar module. The selected contacts are added as invitees of the event.
- **Chat**: Start an Instant Messaging conversation. This option is available when the contact is online.
- **Print**: Select this option to print contacts.
- **Export**: Select this option to export your contacts to a file. For a list of supported file formats, see "How Do I Export My Contacts?".

How Do I Search for a Contact?

You can search for contacts in the corporate address book, your personal address books, or the collected addresses address book.

To search for a contact:

1. Click the address book in which you want to search.
   A column showing all the contacts in that address book appears.

   You can search a contact based on the following criteria:

   - **Display Name**
   - **Email Address**
   - **First Name**
   - **Last Name**
   - **Phone Number**

   > **Note:**
   >
   > By default, the search is performed on the display name.

2. Enter the string that you think would be the best way to find your contact in the text area provided and press enter. All the contacts that match the search criteria appear.

> **Note:**
>
> Convergence treats any entered search string as a 'starts with' search in the Corporate Address Book. For example, if a user enters foo, results beginning with foo are listed.
> In addition, you can add the asterisk * in a search string (for example, *foo ,which allows you to do a wildcard search for a "contains search" or "substring-any" search.

How Do I Sort Contacts?

You can change the way you want to see your contacts. By default, all contacts appear in alphabetical order.

1. Click the address book in which you want to sort the contacts.
   A label showing all the contacts in that address book appears under the **Display Name** search field.
2. Click the **Display Name** label to arrange the contacts in descending order.

How Do I Print Contacts or a Group?

To print contacts or a group of contacts:

1. Click the address book that contains the contact or group you want to print.
2. Do one of the following:
   - Select a group.
   - Select one or more contacts using the Shift or CTRL keys on your keyboard.
3. Do one of the following:
   - Right-click your selection and select **Print**.
   - From the address book toolbar, select **Print**. To print the selected contacts, select **Print Selected** from the context menu. To print a group, select **Print all in list** from the context menu.

   A new browser tab or window appears displaying your print selection.
4. User your browser printer features to print the contents of your print selection.

How Do I Import Contacts That I Have Stored in Other Applications?

You can move your contacts across applications without having to create all the contacts manually. For example, you can export contacts from Microsoft Outlook and import them into Convergence without having to create contacts manually.

Convergence can import **CSV** and **vCard 3.0**. Depending on how your system is set up, Convergence may also be able to import **LDIF** and **vCard 2.1**. Ask your system administrator which additional formats are supported.

This procedure assumes you have already exported your contacts from another application into a file type supported by Convergence.

1. Select a personal address book into which you want to import contacts.

2. Click **Import/Export** icon on the address book toolbar in the left pane in two-pane layout and select **Import**. Click **Import/Export from the Actions** drop-down list on the address book toolbar in the left pane in three-pane layout and select **Import**. The **Import Contacts to Address Book** dialog box appears.
3. Click **Browse** to select the file from which you want to import the contacts. An operating system file browser window displays.
4. Navigate through your file system and select the appropriate file for your contact or address book.

> **Note:**
>
> If the type of file selected does not correspond to the file format, an error appears.

5. Click **Import Contacts**. All contacts are imported into the address book.

How Do I Export My Contacts?

You can export your contacts from Convergence. For example, you could export contacts from Convergence so that you can import them into another application. You do not have to manually enter each contact in your new application.

Convergence can export as **CSV** and **vCard 3.0**. Depending on how your system is set up, Convergence may also be able to export as **LDIF** and **vCard 2.1**. Ask your system administrator which additional formats are supported.

To export contacts:

1. Select the address book from which you want to export the contacts.
2. You can export contacts in two ways.
   - Export all contacts in the selected address book.
   - Select a subset of contacts from the address book.

   To export all contacts in the address book:

   a. Click **Import/Export** icon on the address book toolbar in the left pane in two-pane layout and select **Export**.
   b. Click **Import/Export from the Actions** drop-down list on the address book toolbar in the left pane in three-pane layout and select **Export**.

   To export selected contacts:

   a. Select the contacts by clicking the check box next to the contact or by pressing the Ctrl key (command key for Mac OS users) for nonsequential contacts or use the Shift key for sequential contacts.
   b. Right-click on the selected list.
   c. Select **Export** from the context menu.

   The **Export Contacts from Address Book** dialog box appears and the default export format is selected.
3. Select the format in which you want to export your contacts. If you have selected contacts from the address book, the following options are available.
   - **Export All**: Select this option to export all address book entries.

- **Export Selected**: Select this option to export the selected entries.

4. Click **Export Contacts** to export the contact to the selected format. The contacts are exported in the chosen format and an operating system dialog box appears prompting you to store your entries.

Creating and Managing Contact Groups

The Address book enables you to create groups. A group can have one or more members.

This section contains the following topics:

- How Do I Create a Group?
- How Do I Remove a Contact From a Group?
- What Group Actions Can I Perform on a Group that I Create?
- How Do I Delete a Group?
- How Do I Rename a Group?

How Do I Create a Group?

To create a group, perform the following steps:

1. Click **New Group** icon on the left pane in the Address Book toolbar in two-pane layout. Select **New Group** from the **Actions** drop-down list in the Address Book toolbar in three-pane layout Or: Click **New Group** from the toolbar on the right pane. The **New Group** tab displays with the following fields:
   - **Group Name**: Enter the name of the new group.
   - **Search Contacts:** Search for a particular contact from all contacts in the default address book.
   - List of all the contacts in the default address book.
2. Enter the name of the new group in the **Group Name** text field.
3. Select the contacts by selecting the check boxes provided for each contact. You can also search contacts by typing the name of your contact in the text area provided at the top of this column. Alternatively, to add all the contacts in the new group, click **All** check box provided at the top of the column.
4. Click **Create Group**. The selected contacts are added to this group.

How Do I Remove a Contact From a Group?

To remove a contact from a group, perform the following steps:

1. Select the group from which you want to remove the contact. A column that lists all the contacts in the selected group appears.
2. Right-click the contact and select **Remove From Group** from the context menu. Or, you can follow these steps:
   a. Click **Manage Group** from the address book toolbar. The contacts in the group display in a column.
   b. Deselect the check box next to the contact that you want to remove from the group. To remove all contacts from the group, **Select All** check box next to the **Name** field.
   c. Click **Save Changes**.

Alternatively, you can click **Remove from Group** from the address book toolbar.

What Group Actions Can I Perform on a Group that I Create?

You can perform the following actions on a group that you created. These actions appear when you right-click the created group.

- Compose Mail To. You can send an email to all the contacts in a group. When this option is selected, the compose tab displays with the email addresses of all the contacts in the **To** field.
- New Event: Creates a calendar event on the contacts of a group. When this option is selected, a New Event tab is created and all the contacts of the group are added to the invitee list. For more information about creating events, see "How Do I Create an Event?"
- Rename Group: To know more about how to rename a group, see "How Do I Rename a Group?"
- Delete Group: To know more about how to delete a group, see "How Do I Delete a Group?"

How Do I Delete a Group?

To delete a group, perform the following steps:

1. Select the group to delete.
2. Click the **Delete icon** on the address book toolbar in the left pane in two-pane layout. Select **Delete from theActionsdrop-down list** on the address book toolbar in the left pane in three-pane layout. The **Delete Address Group** dialog box appears requesting confirmation to delete the group.
3. Click **Delete**.

Alternatively:

1. Right-click the group you want to delete.
2. Select **Delete**. The **Delete Address Group** window appears requesting confirmation to delete the group.
3. Click **Delete**.

How Do I Rename a Group?

To rename a group, perform the following steps:

1. Right-click the group that you want to rename.
2. Select **Rename** from the drop-down list to rename the group. The group name node becomes editable.
3. Enter a new name for the group, and press the **Enter** key on your keyboard or click anywhere outside the editable field.

Alternatively:

1. Select the group from the left pane.
2. Click the **Rename** icon on the address book toolbar in the left pane in two-pane layout. Select **Rename from the Actions drop-down list** on the address book toolbar in the left pane in three-pane layout. The group name node becomes editable.

3. Enter a new name for the group, and press the **Enter** key on the keyboard or click anywhere outside the editable field. The selected group is renamed.

About the Collected Addresses Address Book

The collected addresses address book is created by Convergence to collect email addresses that are not in your personal or corporate address books. Each time you send an email to a recipient that is not in your personal or corporate address book, Convergence stores the email address in the collected addresses address book so that Convergence can auto-complete the email address the next time you write to the same address.

The collected addresses address book is much less interactive than your personal address books. You cannot rename it, for example, nor can you manually add contacts to the address book or create groups within it. Also, you cannot create a personal address book with the name "Collected Addresses".

When working with the collected addresses address book, you can do the following:

- What Actions Can I Perform on Contacts From My Address Book?
- How Do I Edit a Contact?
- How Do I Find an Address Location with Google Maps?
- How Do I Delete One or More Contacts From My Address Book?
- How Do I Search for a Contact?
- How Do I Sort Contacts?
- How Do I Copy Contacts From One Address Book to Another?
- How Do I Print Contacts or a Group?

See "How Do I Set the General Preferences in Mail?" for information about enabling or disabling the collected addresses address book.

What Actions Can I Perform on Contacts From My Address Book?

The address book service enables you to perform several operations on one or more contacts. For example, to send a message to multiple contacts, use the address book instead of opening the compose window in the Messages and typing the contacts manually.

The options appear when you select contacts and right-click. The options available in the right-click menu depend on the service available in your deployment. To select multiple contacts, select the check box next to the contact. You can select all contacts by selecting the check box next to Display Name at the top of the results area. You can select multiple contacts by pressing the Ctrl key on the Window keyboard (Command key for Mac OS users) to select non sequential contacts, and the Shift key to select sequential contacts.

Depending on the services included in your deployment, the following options may be available:

- **Compose Mail To:** Select this option to send an email message to the selected contacts. The compose mail tab appears in the Mail module. The selected contacts are added as recipients of the email message.
- **Invite to a New Event**: Select this option to create an event with the contacts as invitees. The **New Event** window appears in the Calendar module. The selected contacts are added as invitees of the event.

- **Chat**: Start an Instant Messaging conversation. This option is available when the contact is online.
- **Print**: Select this option to print contacts.
- **Export**: Select this option to export your contacts to a file. For a list of supported file formats, see "How Do I Export My Contacts?".

How Do I Edit a Contact?

You can edit the contact information for contacts in your personal address books or the collected addresses address book.

To edit a contact:

1. Select the address book containing the contact information you want to edit.
2. Search for and select the contact whose contact information you want to edit.
   The contact's information appears.
3. Click **Edit**.
   A new tab appears that shows the information for the contact.
4. Edit or add the required information for the contact in the corresponding field.
5. Click **Save**.

After editing the contact, all details that you have provided for the contact appear in the view mode.

How Do I Find an Address Location with Google Maps?

If address details have been entered for any contacts in your Personal Address Book or the Corporate Address Book, you can view a Google map of the address location within the address books. To view the Google map of a contact's address, follow these steps:

1. Select the contact in Address Book.
2. If the **Addresses** section contains an address, hover over the **View Map** icon. A thumbnail view of the address location is shown in a Google map.
3. Click **View Map** icon. The map is enlarged.
4. To enter another address, delete the address in the **Search** text field at the top of the map and enter a new address. Click **Show Location**.
5. For driving directions, cycling directions, or walking directions between two locations, select **Driving Directions**, **Cycling Directions**, or **Walking Directions** from the **Search** drop-down menu at the top of the map.
   a. Enter an address in the green **A** and **B** text fields. Directions are listed in the left column of the main pane.
   b. To print directions, click **Print directions** next to the printer icon.
   c. For reverse directions, click the outward-facing arrows icon between address **A** and address **B** on the top of the map.
6. To exit from Google maps, Click **x** in the map tab(s).

How Do I Delete One or More Contacts From My Address Book?

To delete one or more contacts from your address book, perform the following steps:

1. Select the contacts to delete by selecting the check box next to the contact from the address book. You can select multiple contacts by pressing the Ctrl key on your Windows keyboard (or Command key if you use Mac OS) for selecting non-sequential contacts or the Shift key for selecting sequential contacts.
   If you select a single contact, the contact details appear in the central panel. In the case of multiple contacts, the total number of contacts selected appears in the central pane.
2. Click **Delete** displayed on the selected address book tab in the right pane.
   Alternatively:
   a. Right-click on the selected contact(s).
   b. Select **Delete**.

   A dialog box appears prompting for a confirmation.
3. Click **Delete**.

How Do I Search for a Contact?

You can search for contacts in the corporate address book, your personal address books, or the collected addresses address book.

To search for a contact:

1. Click the address book in which you want to search.
   A column showing all the contacts in that address book appears.

   You can search a contact based on the following criteria:

   - **Display Name**
   - **Email Address**
   - **First Name**
   - **Last Name**
   - **Phone Number**

   > **Note:**
   >
   > By default, the search is performed on the display name.

2. Enter the string that you think would be the best way to find your contact in the text area provided and press enter. All the contacts that match the search criteria appear.

   > **Note:**
   >
   > Convergence treats any entered search string as a 'starts with' search in the Corporate Address Book. For example, if a user enters foo, results beginning with foo are listed.
   > In addition, you can add the asterisk * in a search string (for example, *foo ,which allows you to do a wildcard search for a "contains search" or "substring-any" search.

How Do I Sort Contacts?

You can change the way you want to see your contacts. By default, all contacts appear in alphabetical order.

1. Click the address book in which you want to sort the contacts.
   A label showing all the contacts in that address book appears under the **Display Name** search field.
2. Click the **Display Name** label to arrange the contacts in descending order.

How Do I Copy Contacts From One Address Book to Another?

You can copy contacts from any of your address books into a personal address book. You cannot copy contacts into the corporate address book or the collected addresses address book.

To copy a contact to a personal address book:

1. From any of your address books, find the contact you want to copy.
   See "How Do I Search for a Contact?" for more information.
2. From the address book toolbar, select **Copy to**.
3. From the context menu, select the personal address book into which you want to copy the contact.

How Do I Print Contacts or a Group?

To print contacts or a group of contacts:

1. Click the address book that contains the contact or group you want to print.
2. Do one of the following:
   - Select a group.
   - Select one or more contacts using the Shift or CTRL keys on your keyboard.
3. Do one of the following:
   - Right-click your selection and select **Print**.
   - From the address book toolbar, select **Print**. To print the selected contacts, select **Print Selected** from the context menu. To print a group, select **Print all in list** from the context menu.

   A new browser tab or window appears displaying your print selection.
4. User your browser printer features to print the contents of your print selection.

Using Click-to-Call Services to Interact with Contacts

With Click-to-Call services you are able to seamlessly interact with your Address Book contacts. There are two ways to enable click-to-call Address Book services in Convergence:

- Skype
- SMS

This topic answers the following questions:

How Can I Use Address Book to Connect to Skype?

If you have a Skype account, you can use it to call any Address Book contacts.

This topic explains the steps for enabling Skype in Address Book:

1. If you do not have a Skype account, set up the account prior to using Skype with Address Book.
2. Click a contact in your Address Book. Next, click the phone number of that contact.
   A drop-down box lists Convergence's offerings of click-to-call services.
3. Click **Call using Skype** to connect the call with your Address Book contact.

> **Note:**
>
> The Skype application opens on your system; it either asks you to enter login credentials or automatically logs you into your account (if Skype retains your login information).

How Do I Send SMS (Short Message Service) Messages through Address Book?

To send an SMS (Short Message Service) message to an Address Book contact:

> **Note:**
>
> Recipients may be charged for an SMS by their mobile carrier each time you send a message.

1. Click a contact in your Address Book. Next, click the phone number of that contact. Make sure that the recipient phone number can receive SMS messages.
   A drop-down box lists Convergence's offerings of click-to-call services.
2. Click **Send SMS Message**.
   A window displays “SMS Message to <Contact> on <12234567890>” where <Contact> is the name of the recipient of your message and <12234567890> is the recipient's phone number.

   Alternatively,

   In two-pane layout, click **New SMS** (mobile phone) icon on the top left navigation panel to open an SMS window.

   In three-pane layout, Select **New SMS** from the **Action** drop-down list in the upper left corner of the Convergence UI.
3. On the SMS window, click drop-down menu of phone numbers to choose another phone number for the recipient. Or, select **Use Another Number** to enter a phone number not listed in Address Book.
4. Enter your SMS message (which should be less than 160 characters) in the SMS window.

5. Click **Send**.

4 Calendar

The Calendar component of Convergence enables you to create and manage calendars from your browser.

The Calendar component enables you to perform the following tasks:

- Create, Edit, Delete events and tasks.
- Share your calendar with others.
- View other calendars.
- Invite contacts from your address book to events.
- Invite other calendar users to your events.
- Set notifications for events and tasks.
- Manage Calendars. This includes creating multiple calendars and setting calendar properties.
- Import and Export Calendars to and from other applications.
- Print Calendars

The following are some of the sections covered:

- Events
- Tasks
- Views
- Managing Calendars
- Importing and Exporting
- Printing Calendars

To work with Calendars:

- In two-pane layout, click **Calendar** on the left-side navigation panel.
- In three-pane layout, click the Hamburger Menu (three line menu icon in top corner of the Convergence UI), then, click **Calendar**.

The **Calendars** tab appears in the right pane.

In two-pane layout, the calendar toolbar at the top of the Calendar stack panel displays the following icons:

- **Create or Subscribe to Calendar**
- **Calendar Properties**
- **Delete or Unsubscribe Calendar**
- **Toggle Mini Calendar**
- **Import/Export**

In three-pane layout, the following calendar options are available in the **Actions** drop-down list in the calendar toolbar:

- **Create or Subscribe to Calendar**
- **Calendar Properties**
- **Delete or Unsubscribe Calendar**
- **Import/Export**

In three pane layout, the toggle button is available in the calendar toolbar to show/hide mini calendar.

List of calendars appear in the left side navigation panel in a tree format and a mini calendar appears on the left bottom side.

- **My Calendars**: Displays all the calendars that you have created. The calendars appear in a tree format. The calendars that you create appear in various colors.
- **Subscribed**: All the calendars that you have subscribed to are listed under the **Subscribed** tree.
- **Mini Calendar**: Displays a miniature calendar. By default, the calendar for the current month appears. Click the next and previous arrows to view the calendar for the other months. At the bottom of the mini calendar, select the year for which you want to see the calendar. You can see the current year, the previous year and the next year. By default, the current year is selected. To view the calendar for a separate year, select the year from this list.

Events

You can create events on the calendars you own or manage. Calendar enables you to create a one-time or recurring events. For a detailed description of each field, see How Do I Create an Event?

For each event you can specify the following attributes:

- **Title**: Title to briefly describe the event.
- **Calendar**: Calendar in which the event is scheduled.
- **All Day**: Specifies if the event is an all day event.
- **Start, End**: Specifies when the event is scheduled to start and end.
- **Location**: Specifies the location where the event is being held in the location attribute.
- **Description**: A description about the event. For example, include the agenda of the event in this text box.
- You can specify if the event is a public or a private. Public events are visible to all users who subscribe to your calendar. You can also specify an option to only display the date and time of the event.
- You can set your availability during the time the event is in schedule. The options are free or busy.

> **Note:**
>
> Some Convergence deployments are configured such that calendar events configured as busy time automatically change your Instant Messaging status to Do Not Disturb. Ask your administrator if this feature is enabled.

- **Event Type:** One or more categories that help classify the event.
- **Invitations**: Add attendees to your event. Select attendees or groups from any of your address books. Specify individual contacts (by name or email address) or groups. Enter attendee names into the **Invitation** field or select the **address book** icon and search your address books. The attendees you select appear in a list beneath the Invitation field. You can filter the list. You can mark attendees as optional. By default, attendees are marked as mandatory.
- **Check Availability**: Enables you to check the availability of your invitees by checking if they are free or busy at the time you want to organize that event.
- **Attachments**: Adds attachments for your events.
- **Recurrence**: Specifies the recurrence pattern for your event, if the event you want to create occurs frequently.
- **Reminders**: Schedules reminders for your events. For example, you can set a reminder that alerts you 15 minutes prior to the start of the event.

This section contains the following topics:

How Do I Quickly Create an Event?

Convergence enables you to quickly create an event by using the single-click functionality and also by dragging the mouse pointer from one point of time to another.

To quickly create an event, perform the following steps:

1. In two-pane layout, select Calendar from the service selector panel in Convergence UI . In three-pane layout, click the Hamburger menu (three line menu icon) in top corner of the Convergence UI, then, click **Calendar**. The Calendar tab appears in the right pane.

2. Click any calendar view from the Calendar toolbar.
   The following views are available:
   - **Day**
   - **Week**
   - **Next 7**
   - **Month**
3. Click the time during which you want to create the event.
   Based on the position where you click, the nearest approximate time is chosen. The time slots are available in 15 minutes duration. A callout appears displaying a text area where you can enter the event details. By default the event duration is 1 hour. To increase or decrease the duration of the event, you can drag the event by using the mouse pointer.

   OR:

   Drag the mouse pointer from one point of time to another during which you want to create the event. When you release the mouse button a callout appears displaying a text area where you can enter the event details. The total time you have selected by dragging the mouse pointer is taken as the duration of the event. Increase or decrease the duration of the event by placing the mouse pointer close to the two parallel horizontal lines shown close to the bottom of the event, clicking and dragging down/up.
4. Enter the event details in the text area labeled **Event:** The quick-add event functionality enables you to create an event based on the provided description. For example, if you provide the description 1pm lunch at the Counter in the text area, the event attributes that are assigned to the time, location, and title are 1pm, the Counter, and lunch respectively.
5. Click **Create Event**.

> **Note:**
>
> The quick-add functionality creates a simple event with the time, date, event name, and the description attributes. To create an event with more attributes such as reminders, recurrence, and attachments, see How Do I Create an Event?

How Do I Create an Event?

To create an event:

1. From the Calendar toolbar, click **New Event**. A blank event tab appears.
2. In the **Title** field, enter a title for the event.
3. From the **Calendar** list, select the calendar in which you want to create the event. If you have shared or subscribed calendars, they appear in the drop-down list.
4. Select the date on which you want to schedule this event by clicking in the text area provided in the **Start** section. To select a date:
   a. A mini calendar opens when you place the mouse cursor in the text area. Select the date on which you want to schedule the event. On selecting the date from the mini calendar, the date is automatically entered in the format configured for displaying dates. You can navigate to the next or previous months by clicking the arrow keys. You can also select the year from the bottom of the mini calendar. Or, enter in the date in the text area.

   b. Enter the time at which you want to schedule this event provided in the adjacent window. Or, click top and down arrow keys provided. This option is available only when the event is not an entire day event.
   c. If the event is scheduled for an entire day, select the check box provided for the **All Day** event.
5. Do any of the following:
   - Attach a file. From the event toolbar, click **Attach** and select a file to attach from the dialog box. To remove an attachment, click **Remove** beside the attachment.
   - Configure the event to recur. Click **Recurrence**. See How Do I Create a Recurring Event? for more information.
   - Configure a reminder. Click **Reminder**. See In What Ways Can I Receive Reminders and How Do I Set Them? for more information.
   - Specify the time zone in which you want to schedule this event. Click **Time Zone**. The Time Zones window appears with a drop-down list of all the time zones. Select the time zone from the drop-down list and click **Set**. To know more about how to schedule an event at a different time zone other than your calendar time zone, see How Do I Schedule an Event in a Time Zone Other than My Calendar Time Zone?.
   - In the **Location** field, specify a location for the meeting.
   - In the **Description** field, enter a description of the meeting.
   - From the **Event is** list, specify the visibility of the event:
     – **Public**: Events that are visible to all the calendar subscribers. By default, all events are public.
     – **Private**: Events are visible only to the participants of the event.
     – **Show Date and Time Only**: Events that only display the date and time of the event to other users.
   - From the **Show as** list, specify your availability during the event:
     – **Busy**
     – **Free**
     Some deployments are configured such that calendar events configured as busy time automatically change your Instant Messaging status to Do Not Disturb. Ask your administrator if this feature is enabled.
   - Configure the calendar event with one or more categories:
     – From the **Event Type** list, specify one or more categories. For example, you can classify a calendar event as an **Appointment** and **Personal**.
     – From the text field below the **Event Type** list, enter one or more custom categories, separated by a comma. For example, in addition to the **Appointment** and **Personal** categories, you could also classify a calendar event with **Medical** and **XRay** by entering **Medical, XRay**.
6. (Optional) Add attendees to your event:
   Select attendees or groups from any of your address books. Specify individual contacts (by name or email address) or groups. Enter attendee names into the **Invitation** field or select the **address book** icon and search your address books.

   The attendees you select appear in a list beneath the **Invitation** field. You can filter the list.

   By default, attendees you add to an event are marked as mandatory participants. To change an attendee's participation:

   a. From the list of invited attendees, select the drop-down to the right of an attendee's name.
   b. From the context menu, select **Mark Attendee as Optional**.

   For an optional attendee, the context menu shows **Mark Attendee as Mandatory** option. Select **Mark Attendee as Mandatory** from the context menu to change an attendee's participation.

7. Click **Save**.
   The event is created. A notification is sent all attendees.

How Do I Create an Event from My Email?

Calendar lets you to create an event from the contents of a message. The attributes for the email are automatically populated from the message.

The parts of the message are assigned to various attributes of the event. When you create an event from a message, you are the organizer of the event. The To and Cc recipients are assigned as the participants of the event. They are invited when the event is created. The subject of the email is the title of the event. The message body is the description of the event.

To create an event from a message:

1. Right-click the message that you want to create into an event. Select **Other** from the drop-down list.
   - A drop-down list appears with the actions you can perform on this message.
2. Select: **Create Event from Message.**
   - A **New Event** tab in your Calendar is created with the attributes of the message mapped to the event. You can modify the attributes or add more attributes to the new event.

How Do I Schedule an Event in a Time Zone Other than My Calendar Time Zone?

By default, every event that you create is scheduled to the time zone of the calendar in which you create the event.

To create an event in a time zone other than the calendar default time zone, perform the following steps:

1. Create the event by following the steps described in "How Do I Create an Event?"
2. Click **Time Zone** from the **New Event** tab toolbar. The **Time Zone Settings** window appears with a list of all the time zones.
3. Select the time zone from the drop-down list.
4. Click **Set** to set the time zone for the event.

How Do I Check the Availability of the Participants in My Events?

You can check the availability of the participants in the events you create. The check availability feature retrieves the time slots from all of the participants' calendars and provides a graphical interface with the time slot that suits all the participants.

To check the availability of the participants in your events, perform the following steps:

1. Create the event and add the participants of the event. See "How Do I Create an Event?" The participants are added in the Invitations and Reservations window.
2. After adding the participants, click **Check Availability**. The Availability window appears showing the following options:
   - A legend showing the various color coding schemes used to indicate the status of a participant of the event as per the calendar. The following options are available:
     – Confirmed: The participant has accepted an event at this time.
     – Busy: The participant is busy at this time.
     – Tentative: The participant's status is tentative and may be available during this time.
     – Unknown: The participant's email address could not be verified or the participant has chosen not to publish availability information and hence the information is not available.
   - At the bottom of the **Availability** window, the following options are available:
     – **Auto Select Time**: Click this option to automatically select the first available slot that suits all participants of the event. The time slot is highlighted in the availability portion of the slot with a green border.
     – Earlier, Later: To select other slots when the participants are available, use the **Earlier** and **Later**.
3. Click **Auto Select Time** to find the first available time slot during which all participants are available. You can select a later or earlier slot by clicking Later or Earlier.
4. Click **Accept** to set the time of the event when you have found a suitable time slot for organizing the event. The event attributes are set based on the time slot selected.

> **Note:**
>
> Error messages appear when attempting to add users who have provided **None** or **Check Availability** statuses in their Privacy Settings. For more information on Managing Scheduling permissions, see: How Do I Set Calendar Properties?

How Do I Clone an Event?

When you clone an event, a copy of the event is created. All attributes of the event are cloned except the attachment.

To clone an event from another calendar:

1. Select the event that you want to clone from any of the calendar views. A balloon tool tip appears displaying the basic information about the event.
2. Click **Add/View additional Details** link. A new tab is created displaying all the attributes of the event in edit mode.
3. Click **Clone Event**. A **Notice** window appears displaying the message "Item Successfully Cloned". Click **OK**. Calendar view will show the cloned event with the same attributes.
4. Open the cloned event in edit mode to modify the Event details to suite your requirements.
5. Click **Save**.

How Do I Edit Events That Are Already Created?

You can edit events on any accessible calendar in which you have write or manage permission.

Do one of the following:

- Double-click the event that you want to edit. This can be done from any of the calendar views.
- Use the drag-and-drop feature if you want to change the date or time of the scheduled event. From any of the calendar views, drag and drop the event from the original date or time to the new date or time. Attendees of the modified events are sent an update that includes the updated event.
- Select the event and click the **View Event Details** link.

The event appears in edit mode in a new tab in the calendar pane. You can modify the attributes based on your requirement. Click **Save** on the calendar toolbar to save the event.

If the calendar event that you are editing is configured as a recurring event, you are asked to choose whether to edit just a single instance of the event or all the instances in the series.

How Do I Send a Calendar Event Through Email?

When you create a calendar event, invitees are automatically notified through email, as long as your site has enabled this feature. Within mail, they can open the calendar appointment to click one of the following options: **Yes**, **Maybe**, or **No**.

If your site has not enabled this feature, invitees receive a plain email notification.

See: How Do I Accept or Decline a Calendar Event Through Email?

How Do I Delete Events?

You can delete events on any accessible calendar in which you have write or manage permission.

To delete an event:

1. From any calendar view, tap on the event that you wish to delete. A popup for the event appears, displaying basic information about the event.
2. Click **Delete Event**. The following scenarios are available when deleting events:
   - **Deleting a Recurring Event**: If the event you want to delete is a recurring event, a **Confirm Delete Event** window appears. Because a recurring event is set to repeat, you are asked if you want to delete this instance of the event or delete all instances of the event. If you want to delete only the current instance, click **Delete this one**. If you want to delete all instances, click **Delete All**.
   - **Deleting Appointments**: If the event you are deleting is an appointment, you are asked for a confirmation before deleting the event. Subsequently, the appointment is deleted from the user's calendar.
   - **Deleting Meetings**: Depending on your role in the deleted meeting, the following actions are performed. If you are the organizer, a notification is sent to all participants that the event has been cancelled.

How Do I Create a Recurring Event?

You can configure a calendar event as a recurring event, which means it repeats according to a configured pattern.

To create a recurring event:

1. Modify an existing event (see How Do I Edit Events That Are Already Created?) or create a new event (see How Do I Create an Event?).
2. Click **Recurrence**. The **Recurrence** dialog box appears with Repeat drop-down box in the dialog box. **None** option is selected as default. The Repeat drop-down menu has the following options:
   - **None**
   - **Daily**
   - **Weekly**
   - **Monthly**
   - **Yearly**

   The Repeat drop-down menu has the following options:When the user selects an option other than **None**, the Ending drop-down menu and Advanced Check box appears in the **Recurrence** dialog box. The Ending drop-down menu has the following options:
   - **Never**
   - **By**
   - **After**
3. Optionally, select the **Advanced** check box to add more details into the recurring event.
4. Click **OK** to save the setting for recurrence.

In What Ways Can I Receive Reminders and How Do I Set Them?

You can get notified in the following ways:

- **Email**
- **SMS**

You can set notifications for your events and tasks as well as from the calendar options.

1. Click **Reminders** for the event or task.
2. Select the time interval before or after which you want to be notified by selecting the options from the drop-down list. The available options are:
   - **Hours**
   - **Days**
   - **Minutes**
   - **On a specific date and time**: To be notified on a particular date, select this option. The reminder settings widget interface changes accordingly asking you to enter the date and time on which you want to be notified. You can select the date by placing the mouse cursor on the date text box and select the date from the mini calendar. You can also enter the date in the format specified for entering calendar dates.

3. Select the mode of notification (Email or SMS Message) in the drop-down list. For SMS and Email notifications, you need to provide the appropriate phone number and email address respectively.

> **Note:**
>
> You have the option to set the reminder in received invitations. When you open an invitation, the UI shows the **Reminders** option that you can use to set the reminder.

Searching Events or Tasks In My Calendar

Calendar provides various options to search from.

You can search your events or tasks by filtering on the following attributes:

- **All Attributes**. By default calendars are searched based on all attributes.
- Title
- Location
- Description/Notes
- Type

You can search for events or tasks in your calendar by using the following methods:

- How Do I Perform a Basic Search for Events or Tasks? : Searches for events or tasks filtering on the chosen attributes.
- How Do I Perform an Advanced Search for My Events or Tasks? : In this mode, provide more granularity to the search criteria by setting calendars to search in and a date range.

How Do I Perform a Basic Search for Events or Tasks?

To perform a basic search:

1. In two-pane layout, select Calendar from the service selector panel in Convergence UI . In three-pane layout, click the Hamburger menu (three line menu icon) in top corner of the Convergence UI, then, click **Calendar**.
2. Choose whether to search for events or tasks. Do one of the following:
   - **To search for events, select a calendar view, such asCalendarorAgenda.**
   - **To search for tasks, select theTaskview.**
3. In the **Quick Search** field (in the top-right corner of the work area), click the down arrow to select your search criteria:
   - **All Attributes: Searches all the attributes listed below. This is the default search criteria.**
   - **Title**: Searches only the title of your events and tasks.
   - **Location**: Searches only the location of your events and tasks.
   - **Description/Notes**: Searches only the description or notes of your events and tasks.
   - **Attendees**: Searches only the attendees of your events.
   - **Organizer**: Searches only the organizer of your events.

- **Type**: Searches only for events and tasks with a matching type.

4. In the **Quick Search** field, enter the text for which you want to search. Events and tasks are filtered as you enter text that matches the search criteria.

How Do I Perform an Advanced Search for My Events or Tasks?

The advanced search functionality is available in all views of the calendar.

To use the advanced search functionality for events, follow these steps:

1. In two-pane layout, select Calendar from the service selector panel in Convergence UI . In three-pane layout, click the Hamburger menu (three line menu) icon in top corner of the Convergence UI, then, click **Calendar**.
2. In the **Quick Search** field (in the top-right corner of the work area), click the down arrow and select **Advanced Search**. The **Advanced Search** tab appears.
3. From the **Search Calendar** drop-down list, select the calendar that you want to search.
4. Do any of the following:
   - From the **In** list, specify the type of item for which you want to search:
   - – **Events and Tasks**
     – **Events Only**
     – **Tasks Only**
   - From the **Search** list, specify the attribute for which you want to search:
   - – **All Attributes**
     – **Title**
     – **Location**
     – **Attendees**
     – **Organizer**
   - From the **Date Range** field, specify a range of dates in which to search.
   - In the Search For field, enter the text for which you want to search.
5. Click **Search**.

Invitations

Invitations are added to the calendar when you are added as an attendee for an event.

While viewing your invitations, you have the option to list all the open invitations that you have not accepted, declined, or tentatively accepted. You can select one or more of the invitations and accept, decline, or tentatively accept each of these invitations. Accepted invitations inherit the default reminder that you set.

This section contains the following topics:

- How Do I Manage My Invitations?
- How Do I View All My Invitations?

How Do I Manage My Invitations?

To manage invitations, follow these steps:

1. Click **Invitations** from the Calendar view toolbar in the right pane. You can change your calendar view or filter your invitations to see more or fewer invitations. See How Do I View All My Invitations? for more information. All invitations available for your criteria appear.
2. Click the invitation that you want to manage. The following details are available:
   - The Title of the invitation.
   - Sender's details.
   - Date, Start Time and End Time of the invitation.
   - Location
   - The status of your attendance:
     – **Yes**: You will attend the invitation.
     – **Maybe**: You are unsure whether you can attend the invitation.
     – **No**: You cannot attend the invitation. If neither **Yes**, **Maybe**, or **No** is selected, then you have not specified a status. You can select or change your status by clicking an unselected button.
   - A trash can icon to delete the event.
3. Click the title of the event to manage the details of the invitation. A new tab with the details of the events appears.
4. Click **Reminders** to set up a system-generated reminder for the event. The Reminder dialog box appears. Do the following:
   a. Configure when you want to receive the reminder. You can configure the reminder to occur on a specific date and time, or to occur a specified number of minutes, hours or days before or after the event. You can also choose to receive the reminder by email or SMS.
   b. Click **Save Reminder**.
5. From the **Show As** list, specify your availability during the event. Select **Busy** or **Free**. Other users can check your availability when sending you an invitation. Depending on how your system is configured, your calendar availability may also affect your Instant Messaging status. Ask your system administrator for more information.

How Do I View All My Invitations?

To view all invitations in your calendar, follow these steps:

1. Click **Invitations** on the calendar toolbar.
2. Select the view in which you want to see the invitation. Select a view by clicking any of the following options:
   - **Day**
   - **Week**
   - **Next 7**
   - **Month**

   All Invitations available in the selected view appear.
3. To filter on any of the invitation responses above, click on the appropriate option. For example, to view only accepted invitations, click **Accepted**. By default, all invitations are listed.
   - The following details are available:

- The Title of the invitation.
- Sender's details.
- Date, Start Time and End Time of the invitation.
- Location
- The status of your attendance:
  - **Yes**: You will attend the invitation.
  - **Maybe**: You are unsure whether you can attend the invitation.
  - **No**: You cannot attend the invitation. If neither **Yes**, **Maybe**, or **No** is selected, then you have not specified a status. You can select or change your status by clicking an unselected button.
- A trash can icon to delete the event.

4. Click the title of the event to manage the details of the invitation. A new tab with the details of the events appears. See How Do I Manage My Invitations? for more information.

Tasks

The calendar module enables you to create tasks and record them in a selected calendar.

- How Do I Quickly Create Tasks?
- How Do I Create Tasks?
- How Do I Create a Task from My Email?
- How Do I Edit Tasks that I Already Created?
- How Do I Delete Tasks?
- How Do I Search for a Task from My Calendar?

A task has the following attributes:

- **Title**: Title for the task.
- **Calendar**: Calendar on which you want to create the task.
- **Priority**: Priority of the task.
- **Progress**: Progress in percentage.
- **Due**: Date or time the task is due. You can also create a task without a due date or time.
- **Location**: Location of the task.
- **Notes**: Brief description or notes about the task.
- **Privacy**: Task privacy. For example, you can create a task that is publicly visible, private task or a task that only displays the date and time.
- **Task Type**: One or more categories that help classify the task.
- **Attachments**: Task Attachments.
- **Recurrence**: Specify frequency for a recurring task.
- **Reminders**: Enables you to set a reminder for the tasks created.
- **Time Zone**: Time zone in which this task is scheduled.

How Do I Quickly Create Tasks?

The quick create task option enables you to set minimal attributes for the task.

To quickly create a task, perform the following steps:

1. In two-pane layout, click **New Task** icon in the Quick Actions menu in the upper-left corner of the Convergence UI. In three-pane layout, select **New Task** from the **New Event** drop-down list in the upper-left corner of the Convergence UI. The **Create Task** window appears.
2. Set the following properties in the **Create Task** window.
   - **Name**: Enter a title for your task.
   - **Priority**: Enter the priority you want to assign to your task. The following options are available:
     – **Low**
     – **Normal**
     – **High**
3. Select the calendar in which you want to create this task from the **Calendar** drop-down list.
4. Select the visibility you want to assign to this task from the **Task is** drop-down list. The following options are available:
   - **Public**: Select this option if you want others to see this task.
   - **Private**: Select this option if you do not want others to see this task.
   - **Show Date and Time**: Select this option if you want others to only see the date and time.
5. Click **Create Task**.

How Do I Create Tasks?

To create a task:

1. From the Calendar toolbar, click **New Task**. A blank **New Task** tab appears.
2. In the **Title** field, enter a title for the task.
3. From the **Calendar** list, select the calendar in which you want to create the task. If you have shared or subscribed calendars, they appear in the drop-down list.
4. Do any of the following:
   - Attach a file. From the event toolbar, click **Attach** and select a file to attach from the dialog box. To remove an attachment, click **Remove** beside the attachment.
   - Configure the task to recur. From the event toolbar, click **Recurrence**. You can configure a daily, weekly, monthly, or yearly recurrence patterns.
   - Configure a reminder. From the event toolbar, click **Reminders**. You can configure the reminder to arrive before the deadline, or on a specific date and time. You can configure the reminder as an email or as an SMS message.
   - Configure the task with a different time zone from the selected calendar. From the toolbar, click **Time Zone**.

- From the **Priority** list, assign a priority to the task. By default, new tasks have a priority of **Normal**.
- From the **Progress** list, record the progress you have made towards completing the task. By default, new tasks have a progress of **0%.**
- From the **Due** list, assign a deadline for the task. By default, new tasks have a deadline of **None**. Select **Date** to assign a target day as the deadline. A calendar widget appears to help you assign a deadline. Select **Date/Time** to assign a target day and a specific time as the deadline. A calendar widget and a time widget appear to help you assign a deadline.
- In the **Location** field, enter a location for this task.
- In the **Notes** field, enter notes for the task.
- From the **Task is** list, specify the visibility of the task:
  - **Public**: Events that are visible to all the calendar subscribers. By default, all events are public.
  - **Private**: Events are visible only to the participants of the event.
  - **Show Date and Time Only**: Events that only display the date and time of the event to other users.
- Configure the task with one or more categories:
  - From the **Task Type** list, specify one or more categories. For example, you can classify a task as **Training** and **Business**.
  - From the text field below the **Task Type** list, enter one or more custom categories, separated by a comma. For example, in addition to the **Training** and **Business** categories, you could also classify a task with **Soft Skills** and **Career Goals** by entering **Soft Skills, Career Goals**.

5. Click **Save**. The task is created.

How Do I Create a Task from My Email?

Calendar lets you to create a task from the contents of a message. The attributes for the email are automatically populated from the message.

The parts of the message are assigned to various attributes of the task. When you create a task from a message, the task is created in the user's default calendar. The subject of the email is the title of the task. The message body provides the notes in the task.

To create a task from a message:

1. Right-click the message that you want to create into a task. Select **Other** from the drop-down list.
   - A drop-down list appears with the actions you can perform on this message.
2. Select: **Create Task from Message.**
   - A **New Task** tab in your Calendar is created with the attributes of the message mapped to the task. You can modify the attributes or add more attributes to the new task.

How Do I Edit Tasks that I Already Created?

To edit a task, perform the following steps:

1. Click **Tasks** from the calendar toolbar. A list of all the tasks appears with a minimal set of attributes.
2. Click the title of the task. If your task does not appear on the list, you can search your tasks by typing the search attributes in the search text field. To know more about how to Search Tasks, see "How Do I Search for a Task from My Calendar?". The task appears in a new tab in edit mode.
3. Edit the required attributes of the task.
4. Click **Save**.

How Do I Delete Tasks?

To delete a task, perform the following steps:

1. Click **Tasks** from the calendar toolbar. A list of tasks appears with a minimal set of attributes. If your task does not appear on the list, you can search your tasks by typing the search attributes in the search text field. To know more about how to Search Tasks, see "How Do I Search for a Task from My Calendar?".
2. Click the delete icon located to the right of the task, under the Status column. A dialog box appears prompting for a confirmation on the delete action.
3. Click **Delete**.

How Do I Search for a Task from My Calendar?

To search for tasks in your calendar, see " Searching Events or Tasks In My Calendar".

Views

Calendar enables you to view your events, tasks, agenda, and invitations in the following views:

- **Day View**
- **Week View**
- **Month View**
- **Next 7**

This section contains the following topics:

- Calendar Views
- Agenda
- Invitations
- Tasks

Calendar Views

Calendar views display information about your calendar events for a specified period of time. You can view events in the following views:

- Day: Displays events for the day.
- Week: Shows events for theweek.

- Next 7: Shows events for the next 7 days starting from the current day..
- Month: Shows events for the month.

To view events in your calendar in the various views, perform the following steps:

1. Click **Calendar on the calendar toolbar**. By default the Day view is selected and the events for the day appear.
2. Select the view by clicking any of the icons: The following options are available:
   - **Day**: The events for the current day appear. At the right hand side you can navigate to the next or previous days by clicking the arrow provided.
   - **Week**: The events for the current week appear. Use the arrow to navigate to the next or previous weeks.
   - **Next 7**: The events of the next seven days appear. Use the arrow to navigate to the next or previous seven days.
   - **Month**: The events of the current month appear. Use the arrow to navigate to the next or previous months.

   The events appear based on the selected view. The starting and ending days of the current view appears at the right hand side corner. You can view the events for the next or previous set of days by clicking the right or left arrow provided at the right of the view toolbar.

Agenda

The Agenda view displays information about your calendar events for a specified period of time.

To view events in the Agenda view:

1. Click **Agenda** on the Calendar toolbar. By default, the agenda for the current day appears.
2. Click the options on the right hand side of the panel to filter your agenda items: The following options are available:
   - **Day**: The agenda items for the current day appear. At the right hand side you can navigate to the next or previous days by clicking on the arrow provided.
   - **Week**: The agenda items for the current week appear. Use the arrow to navigate to the next or previous weeks.
   - **Next 7**: The agenda items for the next seven days appear. Use the arrow to navigate to the next seven days or the previous seven days.
   - **Month**: The agenda items for the current month appear. Use the arrow to navigate to the next or previous months.

   Convergence displays your calendar events in chronological order. Each event can display text or icons that communicate the following information about the event:

   - The event title
   - The event description
   - The date and time of the event
   - The event location
   - Your response to the event
   - Whether you are the event organizer

- Whether the event is recurring
- Whether a reminder is configured on the event
- Whether you invited others to the event
- Whether there are files attached to the event
- Whether your participation is optional or mandatory
- Whether the event is private

Invitations

To view events in the Invitations view:

1. Click **Invitations** on the Calendar toolbar.
2. Click the options on the right hand side of the panel to filter your invitations: The following options are available:
   - **Day**: The invitations for the current day appear. At the right hand side you can navigate to the next or previous days by clicking on the arrow provided.
   - **Week**: The invitations for the current week appear. Use the arrow to navigate to the next or previous weeks.
   - **Next 7**: The invitations for the next seven days appear. Use the arrow to navigate to the next of previous seven days.
   - **Month**: The invitations for the current month appear. Use the arrow to navigate to the next or previous months.
3. You can display invitations in the following criteria, by clicking the corresponding options. For each view, the number of invitations under that category appears in parenthesis.
   - **All**: Displays all invitations.
   - **Open**: Displays open invitations that you have not accepted, declined, or responded to with a maybe.
   - **Accepted**: Displays all accepted invitations.
   - **Declined**: Displays all declined invitations.
   - **Maybe**: Displays the invitations for which you have set attendance as **Maybe**.
   - **Sent**: Displays all invitations that you sent.

Tasks

To view tasks in the Task list, click **Tasks** on the Calendar toolbar.

You can display tasks in the following criteria, by clicking the corresponding options:

- **Pending Tasks**: Displays pending tasks.
- **Upcoming**: Displays the upcoming tasks.
- **Past Due**: Displays pending tasks that are due in the past.
- **Completed**: Displays the tasks that are complete.
- **All Tasks**: Displays all tasks.

You can also sort the tasks by using the following criteria:

- **Due Date**

- **Priority**
- **Status**

Managing Calendars

You can perform the following operations to manage your calendars:

- **Create New Calendars:** Create new calendars. For example, create a home calendar that's separate from your work calendar.
- **Share Calendars**: Share your calendars with one or more users.
- **Subscribe Calendars**: Subscribe to other's calendars.
- **Set Time Zones**: Configure the time zone for your calendar. This is set to your default time zone.
- **Set a description for your Calendar**: A short description for your calendar.
- **Delete Calendar**: Delete personal calendars that you own.
- **Include Availability lookup**: Specify whether your calendar should display events and tasks when other users perform a free busy lookup on your calendar.

All the calendars can be referenced by using an HTTP URI. The HTTP URI enables other users to anonymously view your calendar. The URI can be used by other permitted users to access your calendar.

This section answers the following questions:

- How Do I Create a New Calendar?
- How Do I Set Calendar Properties?
- How Do I Share a Calendar?
- How Do I Set Privacy Settings?
- How Do I Subscribe to a Calendar?
- How Do I Unsubscribe From a Calendar?
- How Do I Set Time Zones for My Calendar?

How Do I Create a New Calendar?

You can add a new calendar if you want to maintain a separate calendar for specific projects, a home calendar, and so on. You can also share this calendar with a subscriber, provided you set the correct permissions. For more information on calendar sharing, see: How Do I Share a Calendar?

To add a new calendar:

1. In two-pane layout, select Calendar from the service selector panel in Convergence UI . In three-pane layout, click the Hamburger menu (three line menu) icon in top corner of the Convergence UI, then, click **Calendar**.
2. Click the **Create or Subscribe to Calendar** icon on the **Calendar** toolbar on the left pane in two-pane layout.
   Click **Create or Subscribe to Calendar from the Actions** drop-down list on the **Calendar** toolbar on the left pane in three-pane layout.
3. Select **Create Calendar from the drop-down list**.
   The **Create Calendar** window appears.

4. Enter the following information:
   - **Calendar Name:** Name of new calendar
   - **Description:** Description of Calendar
   - **Include in Free/Busy Lookup:** Check if you want this calendar included in free/busy lookup for scheduling
   - **Timezone:** Select your timezone
   - **Color:** Select the color for the calendar
5. Click **OK**.
   A new calendar is created.

How Do I Set Calendar Properties?

To set calendar properties:

1. In two-pane layout, select Calendar from the service selector panel in Convergence UI . In three-pane layout, click the Hamburger menu (three line menu) icon in top corner of the Convergence UI, then, click **Calendar**.
2. Click the down arrow next to the **Calendar Properties icon** on the Calendar toolbar in two-pane layout. Click **Calendar Properties from the Actions drop-down list** on the Calendar toolbar in three-pane layout.
3. Select the **Calendar Properties** option from the drop-down list. Set the following properties for your calendar in the **Calendar Properties** window that appears.
   - **Name**: Enter the calendar name. To rename a calendar, Enter the new name.
   - **Description**: Provide a description for the calendar in the description field.
   - **Time Zone**: Set a time zone for your calendar. To set a time zone, select the time zone from the drop-down list.
   - **Color**: Set a color for your calendar from the drop-down list.
   - In addition to the above properties, a URL to the shared calendar is also available. This URL can be used to access a calendar anonymously.
4. Click **OK**. The calendar properties are set.

How Do I Share a Calendar?

You can share a calendar with other users, set access permissions for users, check availability of the users, and invite the users.

To share a calendar:

1. In two-pane layout, select Calendar from the service selector panel in Convergence UI . In three-pane layout, click the Hamburger menu (three line menu) icon in top corner of the Convergence UI, then, click **Calendar**.
2. Click the down arrow next to the **Calendar Properties icon** on the Calendar toolbar in two-pane layout. Click **Calendar Properties from the Actions drop-down list** on the Calendar toolbar in three-pane layout.
3. Select the **Share Calendar option from the drop-down list** to set accessibility permissions for your calendar. Choose from the following options:
   - **Share Calendar:** To share your calendar with other users, select this check box.

- In the section below **Share Calendar**, specify a list of people with whom you want to share this calendar.
  This section has the following columns:
  - User: You can share the calendar and set the access permissions to all the users by selecting the **Access Permission** option next to Anyone. Click the (+) icon at the end of the row to add a user with whom you want to share the calendar. Click the Address Book icon to choose a user then set the access permissions.
  - Access Permissions: For each user, assign access permissions by selecting one of the following options:
    * None: Select this option if you do not want to share your calendar with other users. This option indicates that the calendar cannot be shared.
    * Read: Select this option to provide read access to other users. This access permission enables other users to view event details.
    * Read + Write: Select this option to provide read and write access to other users. In this case, other users can read and modify events on your calendar.
    * Owner: Select this option to provide the owner rights of the calendar. The other users can do any operation that the owner has on a shared calendar.

    Add or remove rows by clicking plus or minus provided at the end of each row.

Click **Save** to set the access permissions.

How Do I Set Privacy Settings?

Users can set access permission options, such as None, Read, Read+Write, and Owner permissions from the **Share Calendar** option. Scheduling permissions options, such as None, Check Availability, Invite, and Manage are set from the **Privacy Settings** option.

To set the privacy settings:

1. Select a calendar from My Calendars.

   > **Note:**
   >
   > Do not select a calendar from the Subscribed list of calendars. Privacy Settings are associated with the user not with the calendar.

2. Click the down arrow next to **Calendar Properties** icon from the Calendar toolbar in two-pane layout. Click **Calendar Properties** from the **Actions** drop-down list on the Calendar toolbar in three-pane layout. Choose from the following options:
   - Calendar Properties: Provide the basic information about the calendar.
   - Share Calendar: Provide access permissions for your calendar.
   - Privacy Settings: Provide scheduling permissions for all your calendars.
3. Select **Privacy Settings** to set the scheduling permissions. The Privacy Settings dialog appears.

> **Note:**
>
> If the Privacy Settings option is disabled in the Calendar Properties menu, it's because you selected a Subscribed calendar instead of a calendar from the My Calendars list.

4. In the **Settings For** field, select the user whose calendar you are setting user access permissions. The default is your calendar. If you have been granted permission to manage someone else's calendar, from the corporate address book, select the user from your address book who has given you permissions to manage calendar privacy settings. With these permissions, you are able to view, update, and save the user's privacy settings. If you view the privacy settings of a calendar for a user who has not authorized you to manage privacy settings, the following error appears: "You do not have permission from this user to perform this action."
5. You can set privacy settings for all users by selecting the **Access Permissions** option next to Anyone. Click the (+) icon at the end of the row to add a user. Enter the user name and then set privacy settings.
   - Click the down arrow in the **Access Permissions** option.
     The following options appear.
     – None: Select this option if you do not want grant any scheduling permissions.
     – Check Availability: Select this option if you are allowing other users to check your availability. This option only displays your status (free or busy). The event details are not visible to others.
     – Invite: Select this option to enable other users to invite the user to a calendar event. This permission also includes the Check Availability access permission.
     – Manage: Select this option to enable other users to manage your scheduling and privacy settings.

     Add or remove rows by clicking plus or minus provided at the end of each row.
6. Click **Save**.
   The privacy settings are set.

How Do I Subscribe to a Calendar?

You can subscribe to any calendar that has at least **Read** permission.

To subscribe to a calendar, perform the following steps:

1. In two-pane layout, select Calendar from the service selector panel in Convergence UI . In three-pane layout, click the Hamburger menu (three line menu) icon in top corner of the Convergence UI, then, click **Calendar**.
2. Click the **Create or Subscribe to Calendar** icon on the **Calendar** toolbar on the left pane in two-pane layout. Click **Create or Subscribe to Calendar from the Actions** drop-down list on the **Calendar** toolbar on the left pane in three-pane layout.
3. Select **Subscribe to Calendar from the drop-down list .** The **Subscribe** tab appears on the right pane.
4. Enter the user name or the email address to search in the text box provided. A list of all users matching the search criteria are listed in the search pane.
5. Select the calendar that you want to subscribe to by selecting the corresponding user name. All calendars belonging to the user are listed in the right pane. For each calendar,

the permissions assigned to the calendar are also provided. All calendars that are already subscribed by the user and those that cannot be subscribed by the user are disabled. These calendars cannot be selected.

6. Select the calendars to subscribe to by selecting the corresponding check box for each calendar.
7. Click **Subscribe**. The selected calendar is added to the list of subscribed calendars in the Calendar service pane.

How Do I Unsubscribe From a Calendar?

To unsubscribe from a calendar perform the following steps:

1. Right-click the calendar to unsubscribe. The following options appear:
   - **Properties**
   - **Unsubscribe**
2. Select **Unsubscribe**. The Remove Subscribed Calendar dialog appears.
3. Click **OK** to unsubscribe from the calendar.

Optionally, you can select the calendar:

Click the **Delete or Unsubscribe Calendar** icon on the Calendar toolbar in the left pane in two-pane layout.

Click **Delete or Unsubscribe Calendar from the Actions drop-down list** on the Calendar toolbar in the left pane in three-pane layout.

How Do I Set Time Zones for My Calendar?

To set time zones for your calendar:

1. Click the down arrow next to the **Calendar Properties icon** on the Calendar toolbar in two-pane layout. Click **Calendar Properties from the Actions drop-down list** on the Calendar toolbar in three-pane layout.
2. Select the **Calendar Properties** option from the drop-down list. The **Calendar Properties** dialog box appears.
3. Choose the timezone from the **Timezone** drop-down menu.
4. Click **OK**.

Importing and Exporting

You can export and import your events and tasks to and from other calendar applications.

The following formats are supported:

- **iCal**

The import and export feature of Calendar lets you to quickly populate your tasks and events to and from other calendar applications without you having to create the events and tasks manually.

This section contains the following topics:

- Importing Calendars

- Exporting Calendars

Importing Calendars

In two-pane layout, you can import your events and tasks from other calendar events by clicking the **Import/Export** icon on the calendar toolbar.

In three-pane layout, you can import your events and tasks from other calendar events by selecting the **Import/Export option** from the **Actions** drop-down list on the calendar toolbar.

- How Do I Import Calendars Events and Tasks that I Create in Other Calendar Applications?

How Do I Import Calendars Events and Tasks that I Create in Other Calendar Applications?

To import events and tasks:

1. In two-pane layout, click the **Import/Export** icon from the calendar quick actions menu. In three-pane layout, select the **Import/Export** option from the **Actions** drop-down list on the calendar toolbar.
2. Select **Import**. The **Import Events and Tasks** window appears.
3. In the Select File section, click **Browse**. Select the file you want to import by navigating through the file system.
4. Select the calendar into which you want to import the events from the **Calendar** folder selector widget.
5. Click **OK**. When the process is complete, a message box indicating that the import has succeeded appears. If an error occurs while reading the imported file, an appropriate message appears and you will be prompted to try the import operation again.

Exporting Calendars

Convergence lets you to export your events and tasks in the iCal format. You can then import the exported events and tasks into other applications that support the iCal format. You also have the option to export your events and tasks in a specific date range.

- How Do I Export my Events and Tasks?

How Do I Export my Events and Tasks?

To export your events and tasks:

1. Click **Import/Export** icon on the Calendar toolbar in the left pane in two-pane layout and select **Export**. Click **Import/Export from the Actions** drop-down list on the calendar toolbar in the left pane in three-pane layout and select **Export**. The **Export Events and Tasks** window appears.
2. Select the calendar you want to export from the **Calendar** drop-down menu. By default, the calendar that you have currently chosen appears.
3. Specify the dates between which you want your events and tasks to be exported. Calendar exports the events and tasks that you created in between the specified dates. If you do not specify any dates, all events and tasks are exported.
4. Click **OK**.

Printing Calendars

Convergence lets you to print events on your selected calendar.

The following print styles are supported:

- **Daily**
- **Weekly**
- **Monthly**
- **Next 7**

For more information, see the following topic:

- How Do I Print Calendars?

How Do I Print Calendars?

To print a calendar:

1. Click the down arrow next to **Print** on the Calendar toolbar. The following options are available:
   - **Print**: The **Calendar Print** window appears after selecting this option.
   - **Advanced Print**: The **Print Calendar** dialog box appears after selecting this option.
2. Select **Advanced Print** from the drop-down list. The **Print Calendar** dialog box appears.
3. Select the calendar view that you want to print by clicking any of the views. The options are:
   - **Daily**
   - **Weekly**
   - **Monthly**
4. Select the start date from the **Starts** drop-down list.
5. Select the end date from the **Ends** drop-down list.
6. Select the hours you want to print from the **From** and **To** drop-down lists.
7. Select the calendars you want to print by clicking the check box from the list of **Calendars**.
8. Click **OK**. The calendar data is formatted and sent to the configured printer.

> **Note:**
>
> Be sure to enable printing of background colors and images in your browser. If you do not enable printing of backgrounds, items such as status icons for invitee response do not print.

5
Options/Settings

In two-pane layout, use the **Options** tab in the stack panel in the left hand side to manage and customize your preferences for Convergence.

In three-pane layout, select **Settings** from the drop-down list at the top right corner of the Convergence UI to manage and customize your preferences for Convergence.

Use the options tab for:

- Setting Global Preferences
- Setting Mail Preferences
- Setting Calendar Preferences

Setting Global Preferences

This topic answers your questions about how to modify the global settings in Convergence.

This section contains the following topics:

- How Do I Set the General Preferences in Mail?
- How Do I Set the Date and Time?
- How Do I Change My Password?
- How Do I Set Sound Notifications?
- How Do I Set a Theme in Convergence?

How Do I Set General Preferences?

To Set General Preferences, perform the following steps:

1. **In two-pane layout, from theServicemenu, click Options**. The **Options** section appears. In three-pane layout, from the drop-down list at the top right corner of the Convergence UI, select **Settings**. The **Settings** section appears.
2. From the **Global** section, click **General**. The **General Preferences** tab appears in the work area.
3. From the **Language** list, select the language in which you want the application to appear.
4. From the **Convergence Startup** list, select the service that you want to appear by default when you first log into the application. The available options are:
   - **Mail**
   - **Calendar**
5. From the **General Layout**, select the layout. This option is available as two-pane layout and three-pane layout. The chosen layout information is stored as your preference and appears when you log back in.
6. Click **Save Preferences**.

How Do I Set the Date and Time?

Setting the date and time affects all the components of your application where the date or time are displayed.

To set the date and time:

1. **In two-pane layout, From the Service menu, click Options**. The**Options** section appears. In three-pane layout, From the drop-down list at the top right corner of the Convergence UI, select **Settings**. The **Settings** section appears
2. From the Global section, click **Date & Time**. The **Date & Time** tab appears in the work area.
3. Set your time zone. From the **Time Zone** list, select your time zone.
4. Set your date format.
    a. For **Order**, specify the order in which you want the date to be formatted. Where *DD* represents the day, *MM* represents the month, and *YY* represents the year.
    b. For **Delimiter**, specify the delimiter you want to have appear between the day, month, and year of the date.
5. Set the time format. Select either **12 hour** or **24 hour**.
6. Click **Save Preferences**.

How Do I Change My Password?

To change your password:

1. Click **Change Password**. The Password tab appears in the central panel.
2. Enter the old password in the **Current Password** field.
3. Enter the new password in the **New Password** and **Confirm New Password** field.
4. Click **Save Preferences**.

How Do I Secure My Account Using a Secondary Email Address?

You can secure your account by adding a secondary email address.

> **Note:**
>
> You can add a secondary email address only if the corresponding option is enabled on your site by the administrator.

If you are locked out of your account, you can use your secondary email address to reset your password.

If you do not have a secondary email address set for your account, or if you have not confirmed your secondary email address, a banner message appears each time you login to Convergence UI.

To add a secondary email address to your account:

1. Do one of the following:

- In the banner message, click **Add your secondary email address**.
- In the left-side navigation pane, select **Options**, expand **Mail**, then **Identities**, and then select **Local Account.**

The **Local Account** page appears.

2. In the **Secondary Email** field, enter your secondary email address.
3. Click **Save Preferences**.

> **Note:**
>
> If you leave the **Secondary Email** field empty, password resetting instructions will not be sent to any email.

How Do I Set Sound Notifications?

You can configure Convergence to play a sound through the computer sound card when you receive a new email message or a new instant message.

To set sound notification:

1. In two-pane layout, from the Service menu, click **Options**. The**Options** section appears. In three-pane layout, From the drop-down list at the top right corner of the Convergence UI, select **Settings**. The **Settings** section appears.
2. Expand **Global** and select **Sound Alerts**. The **Sound Alerts** tab appears in the work area.
3. Select **Enable sound alerts for new mail** for your browser to play a sound through the computer sound card when you receive a new email.
4. Select **Enable sound alerts for new IM message** for your browser to play a sound through the computer sound card when you receive a new instant message.

Your browser may not support sound alerts or may need an audio plugin to play sound alerts. Search for and install a suitable audio plugin according to the instructions provided by your browser.

How Do I Set a Theme in Convergence?

Convergence enables you to set a theme to customize the client's look-and-feel. The option to set a theme is provided on the top banner of the Convergence user interface. This option is available as colored options in the shape of a square.

The following themes are available:

- Blue
- Orange
- Dark Blue
- Light Blue
- Grey
- Yellow
- Green
- Teal

- Teal Ocean
- Butterfly Blue
- Pink
- Pink Hearts
- Blue Cheery
- Starry
- Altair

To set a theme, perform the following steps:

1. Click **Themes adjacent to the Sign Out link** in the top right corner of the user interface in two-pane layout. Click **Themes** icon adjacent to the drop-down list at the top right corner containing the signed-in user's name in three-pane layout.
2. Scroll through the various color and image themes. Click the desired theme which is immediately applied to the user interface. The chosen theme information is stored as your preference and appears when you log in.

Setting Mail Preferences

This topic answers your questions about how to modify the settings for your mail.

- How Do I Set the General Preferences in Mail?
- How Do I Set a Signature for the Messages I Compose?
- How Do I Set the Layout of the Messages in My Inbox?
- How Do I Enable Automatic Forwarding of Messages?
- Mail Filters
- How Do I Set a Vacation Message?
- Sender Identities
- Collecting Email From External Accounts

How Do I Set the General Preferences in Mail?

You can set preferences for the Email messages in your Inbox. After setting the preferences for your Email messages, click **Save Preferences** at the bottom of the page. Alternatively, you can also set the preferences for more than one option, and click **Save Preferences.** All preferences that you set are saved collectively.

The following options are available when setting general mail preferences:

- **Place a Copy in**: Whenever you send an Email message, a copy of your Email message is by default placed in the **Sent** folder. To save a copy of your sent Email messages in a specific folder, perform the following steps:
  1. Click **Select**. The **Select a folder** window opens displaying the folders in your Inbox.
  2. Select the folder into which you want to place your sent Email messages.
  3. Click **Save Preferences**.
- **Deleting Mail Messages**: Whenever you delete an Email message, the deleted Email message is placed in the **Trash** folder. You can set one of the following preferences on deleted Email messages:

  - **Move messages to a specified folder**. By default all Email messages are moved into the **Trash** folder. To move an Email message to a specific folder, perform the following steps:
    1. Click **Select**. The **Select a folder** window appears, displaying the folders in your Inbox..
    2. Select the folder into which you want to place your deleted Email messages.
    3. Click **Save Preferences**.
  - **Mark messages as deleted**. When you mark an Email message as deleted in your Inbox, the Email message is marked for deletion. The Email messages marked for deletion are indicated with a trash can icon adjacent to the Email message.
- **Expunging Deleted Mail Messages**: You can expunge all deleted Email messages when you log out of Convergence. To set this preference, select the **Empty the trash folder on log out** check box.
- **Saving Drafts**: You can set a preference to save your Email message drafts. By default, all Email message drafts are saved in the **Drafts** folder. To move an Email message to a specific folder, perform the following steps:
  1. Click **Select**. The **Select a folder** window appears, displaying the folders in your Inbox.
  2. Select the folder into which you want to place your draft Email messages.
  3. Click **Save Preferences**.
- **Composing Email**: These preferences are applied at the time of composing Email messages. The following options are available:
  - **Quoting Text in Replies**: This option is set by default. When you reply to an Email message, the original is included in the reply. If you do not want to include the original Email message while replying, deselect the check box adjacent to the **Include the original message in reply** option.
  - **Spell Check**: To always perform a spell check before sending mail, select this check box.
  - **Rich Text Editing**: Email Messages can be drafted either in rich text format or plain text. By default, the Email message drafting option is set to rich text format. To draft Email messages in plain text, deselect the check box next to the **Compose messages using HTML** option.
  - **Adding Default Bcc**: Use this option to send all your Email messages as blind copies to specified email addresses. This option is not selected by default. To add email address in the Bcc list:
    1. Select the check box labeled **Bcc these email addresses**.
    2. Enter the email address in the text field provided. To specify more than one email address, you must separate them with a comma. A check is performed to see if the email addresses are valid. If the addresses are not valid, the following message appears: **Invalid email addresses in bcc list**.
    3. Click **Save Preferences**.
  - **Collected Addresses**: Enable **Automatically save outgoing email addresses** to allow Convergence to collect email addresses that do not already appear in your personal or corporate address books. Convergence saves these collected email addresses in an address book called Collected Addresses. Convergence uses the email addresses in this address book to help you auto-complete email when you write email. See "About the Collected Addresses Address Book" for more information.

How Do I Set the Layout of the Messages in My Inbox?

You can customize the order in which your mail appear in your mail box and also you can disable or enable message preview.

In two-pane layout, you can customize the layout from **Layout** option under the **Mail** options in left pane along the following lines:

- The order in which the messages appear in your Inbox.
- The order in which the attributes of the messages appear in your Inbox.
- Disable or enable message preview.

In three-pane layout, you can customize the layout from **Layout** option under the **Mail** options in left pane along the order in which the messages appear in your Inbox.

To set the order in which the messages appear, perform the following steps:

1. Select one of the following options under the **Message List Default Order** section. The following options are available:
   - **Most recent first**: Click the radio button corresponding to this option to list your most recent messages first. This option is selected by default.
   - **Most recent last**: Click the radio button corresponding to this option to list your most recent messages last.
2. Click **Save Preferences**.

To customize the way the columns appear in your Inbox, perform the following steps:

1. Change the order in which you want to display the columns by selecting the column name from the **Column Name** list.
2. Click **Move up** or **Move Down** to change the ordering. The column on the top of this list will appear at the left in the Inbox.
3. Click **Save Preferences**.

To disable or enable the message preview perform the following steps:

1. Select the **Disable Message Preview** check box to disable the message preview or deselect the check box to enable message preview.
2. Click **Save Preferences**.

How Do I Set a Signature for the Messages I Compose?

You can create a signature that is appended to the body of your email message. You can create a different signature for each of your email identities. See "How Do I Set Identity Settings for My Local or External Accounts?" for more information.

1. **In two-pane layout, From theServicemenu, click Options**. The **Options** section appears. In three-pane layout, From the drop-down list at the top right corner of the Convergence UI, select **Settings**. The **Settings** section appears.
2. Under **Mail**, expand **Identities**.
3. Select the identity for which you want to create a signature. The **Identity Settings** for the selected identity appear.
4. Enter the signature in the rich text editor. Your signature can include a JPG, GIF, or PNG image file.

5. Select **Add the signature to every message you compose**.
6. Select the **Insert the signature before the quoted text** checkbox, the signature will be added before original message or the quoted text.
7. Click **Save Preferences**. The signature will appear in the message body for all emails sent from the selected account.

How Do I Enable Automatic Forwarding of Messages?

You can set your mail preferences in such a way that your messages that you receive would be automatically forwarded to specified email addresses.

To enable automatic forwarding for your messages, perform the following steps:

1. Select **Forwarding** from the **Local Account** setting in the **Mail** section located under the **Options** tab on the left panel in two-pane layout. Select **Forwarding** from the **Local Account** setting in the **Mail** section located under the **Settings** tab on the left panel in three-pane layout. The **Forwarding** tab appears on the right pane.
2. Select the check box labeled **Enable Automatic Forwarding**.
3. Enter the email address to which you want to forward your messages in the **Forward to** text area. To forward your messages to multiple email addresses, you must separate them with a comma.
4. To keep a copy of the forwarded messages, click the check box labeled **Keep a copy of the message**.
5. Click **Save Preferences**.

Mail Filters

With the help of mail filters, you can set up your Inbox to organize incoming mail into different folders.

This section contains the following topics:

- How Do I Create a New Filter?
- How Do I Edit a Filter?
- How Do I Delete a Filter?

How Do I Create a New Filter?

To create a mail filter:

1. Click **Mail Filters** from the **Local Account** setting in the **Mail** section located under the **Options** tab on the left panel in two-pane layout. Click **Mail Filters** from the **Local Account** setting in the **Mail** section located under the **Settings** tab on the left panel in three-pane layout. The **Message Filters** tab, displaying a list of existing filters, appears in the central pane. By default, the status of a filter is **enabled**. To disable a filter, deselect the check box.
2. Click **New Filter**. The New Filter tab appears in the central pane.
3. Enter the name of the filter in the **Filter Name** text box.
4. Enter the conditions that the mail filter should apply for incoming messages. Select one of the following options:

- **Match all the following**: Select this option to apply all the conditions you define for a filter.
- **Match any of the following**: Select this option to apply any one of the conditions you define for a filter.
- **Match all incoming**: Select this option to apply the conditions to all incoming messages.

In the first drop-down list, choose the required option. The available options are as follows:

- **To**: This option is selected by default.
- **Cc**
- **Recipient**
- **Subject**
- **From**
- **Message Size (KB)**
- **Message Body**
- **Attachment Name**
- **Attachment Type**
- **Priority**
- **Date**

Choose the required option from the second drop-down list. The available options are as follows:

- **Contains**: This option is selected by default.
- **Doesn't contain**
- **Begins with**
- **Ends with**
- **Is equal to**
- **Is not equal to**

In the adjacent text area, enter the appropriate string that the filter should match. If you select the **To**, **Cc** or **Recipient** option, enter the email address. If you select the **Subject** option, enter the appropriate text in the text box. If you select the **Message Size (KB)** option, enter the size of the message in Kilo Bytes (KB). You can add multiple conditions by clicking the plus (+) icon. To remove a condition, click the minus (-) icon.

5. Specify the filter action. You can add multiple actions by clicking the plus (+) icon. To remove an action, click the minus (-) icon.

   - **Move message to**: Select this option to specify the name of the folder in which the message is stored by clicking **Select**.
   - **Copy message to**: Select this option to specify the name of the folder in which a copy of the message is stored by clicking **Select** .
   - **Forward message to**: Select this option if you want to forward this message to another email address. In the adjacent text box, enter the email address to which the message should be forwarded.
   - **Discard the message**: Select this option if you want to discard the message. If you select this option, other options that you might have selected are deselected automatically.

6. Select the **Do not include messages received before** check box to specify the date up to when the messages should not be included. Click the adjacent field and select a date from the popup window.
7. Select the **Do not include messages received after** check box to specify the date after when the messages should not be included. Click the adjacent field and select a date from the popup window.
8. To disable this filter, select the **Stop after processing this filter** check box. If you select this option, no other filter is processed after this filter is processed.
9. Click **Save Filter**.

How Do I Edit a Filter?

To edit a filter:

1. Select the filter that you want to edit and click **Edit Filter**. The Edit Filter window appears.
2. Edit the required information and click **Save Filter**.

How Do I Delete a Filter?

To delete a filter:

1. Select the filter you want to delete.
2. Click **Delete Filters**. A confirmation dialog box appears.
3. Click **OK** to confirm the delete action.

How Do I Set a Vacation Message?

Vacation messages are a way to let the senders know that you are on vacation. You can set an automatic reply for messages that you receive in your Inbox. A vacation message usually contains information of the duration for which you are on vacation. An automatic reply is sent to the sender of the email indicating that you are on vacation.

To set a vacation message:

1. Click **Vacation Message** from the **Local Account** setting in the **Mail** section located under the **Options** tab on the left panel in two-pane layout. Click **Vacation Message** from the **Local Account** setting in the **Mail** section located under the **Setting**s tab on the left panel in three-pane layout. The **Vacation Message** tab appears in the central panel.
2. Check the **Enable auto-reply** box. This enables your Inbox to send replies automatically to all incoming messages.
3. Select the start and end date from the vacation duration pane.
4. Each sender will receive an automated reply when they send their first message. You can set the number of hours after which an auto reply is again sent to the same sender. Enter the duration in hours in the **Hours between replies** field.
5. Enter subject and the vacation message for both coworkers and other senders in the respective text areas.
6. Click **Save Preferences**.

Sender Identities

Convergence enables you to create and manage additional email account profiles in addition to the default profile. You can create multiple profiles for accounts that allow POP access. By creating multiple profiles, you can manage your email from Convergence. The email messages are collected in a designated folder (Inbox by default). You can send, receive, reply, or forward, email by using Convergence, instead of using other services. To know more about how to collect email from external accounts, see "Collecting Email From External Accounts".

User profiles created for external accounts are saved as identities in Convergence. These identities appear under the Mail options in a drop-down list. When working with email, you can select any of the configured identities to send, reply, or forward email.

This topic contains the following sections:

- How Do I Set Identity Settings for My Local or External Accounts?
- How Do I Remove an Identity Configured on Convergence?

How Do I Set Identity Settings for My Local or External Accounts?

You can set identity settings for the messages in your Inbox. The identity settings provides user details. Your Local Account represents your Convergence Account. You can also configure Convergence to collect messages from other email accounts. See "Collecting Email From External Accounts" for more information.

To set your identity settings:

1. Expand the **Identities** node from the **Mail** options from the left pane. The Identities node expands with a list of all available identities.
2. Select the identity to update. Select **Local Account** to set the account preferences for the account that is configured for Convergence, or select one of your configured external accounts. The **Account Settings** tab appears.
3. Enter the following under the **Identity Settings** section.
   - **Name**. This option cannot be edited.
   - **Email Address**. This option cannot be edited.
   - **Reply-to Address**. To set your replies to other email address, enter the email address you want your email replies to be sent.
4. Enter the Signature that you want to associate with this identity in the **Signature** text area. Select the **Add the signature to every message you compose** check box to include this signature at the end of every email.
5. Select the **Insert the signature before the quoted text** checkbox to add the signature before original message or the quoted text.
6. Enter the vCard information in the **vCard** section. The following options appear:
   - **Name**: You can provide the following details:
     – **First**
     – **Last**
     – **Display Name**
     – **Company**
     – **Job Title**

    - **Department**
    - **Home Page**
  - **Email**: You can provide the following details:
    - **Work**
    - **Home**
  - **Phone**: You can provide the following details.
    - **Work**
    - **Home**
    - **Mobile**
    - **Fax**
    - **Pager**
  - **Address**: You can provide the following details:
    - **Street**
    - **City**
    - **State/Provice**
    - **Zip/Postal Code**
    - **Country**
7. (Optional) Select the check box labeled **Add the vCard to every message you compose** to add the vCard.
8. Click **Save Preferences**.

How Do I Remove an Identity Configured on Convergence?

Sender identities are tightly integrated with external profiles that you configure on Convergence to collect email from other accounts. When you set Convergence to collect email from external accounts, an identity is created for you and is added under the Identities node in the Mail preferences. The identity is removed when you delete the account setting for collecting external mail. See "How Do I Remove an Existing External Account?"

> **Note:**
>
> The default identity cannot be removed.

Collecting Email From External Accounts

Using Convergence, you can receive email from the default mail server that is configured for your deployment and email from other accounts. Convergence supports POP (Post Office Protocol).

This section contains the following topics:

- How Do I Configure Convergence to Collect Mail From Other Accounts?
- How Do I Remove an Existing External Account?

How Do I Configure Convergence to Collect Mail From Other Accounts?

You can create a new account to collect external mail.

To configure Convergence to collect email from other accounts, perform the following steps:

1. Click **New Account** node under the **External Accounts** node in the left navigation panel. A new tab titled **New Account** appears in the central panel with the following options:
   - **Account Info**: Requires user information that you must provide for the external account.
   - **Incoming Server**: Specifies the incoming server details that you must provide for the external account.
   - **Confirm**: Enables you to review the account settings. You can also modify the settings by going to the previous screens using the **Previous**.
   - **Status**: Collects all the email from the external account.

   Enter the user information in the **Account Info** page by using the following options:
   - **Email account name:** Email account name.
   - **Email Address**: Email address for this account. This email address appears as the **From** email address when this account is used as the identity for sending mail.
   - **Give this account a name**: Name for this account. Your account is identified with this name under the External Accounts node.
2. Click **Next**. The **New Account** page appears. On this page, enter the properties related to the external account. The following options appear:
   - **Incoming Server**
     - **Server Name**: Enter the server name and port number that Convergence should use to get the external email.
     - **Security:** By default, the security option, **None** and the port number 110 are selected. If you want to collect your email by using TLS (Transport Layer Security), select the **TLS** option. If you want to collect your email by using SSL (Secure Socket Layer), select the **SSL** option. If you use SSL, the corresponding port number is changed to 995 (the default SSL port). If your server uses a customized SSL port, you must change the port number accordingly.
     - Select the **Delete messages after successful retrieval** check box if you want to delete the message from the external server after getting the email.
   - **Folder receiving incoming messages**
     - **Target folder:** Choose the folder into which you want to collect external mail. By default all external email is collected in the Inbox. If you want your external email to be stored in a separate folder, click **Select**. The window appears where you can select the folder into which you want to store your incoming external mail.
   - **Authentication**
     - Enter the login or user name for the external account in the **Login/User name** text field
     - Enter the password for the external mail in the **Password** field.
     - Re-enter the password in the **Confirm password** field.

  – Enable the **Remember password** checkbox if you want Convergence to remember your password. The password is saved as part of your user preferences.

3. Click **Next**.

   The **Confirm** page appears. Review the account details that you provided to ensure the information is correct. To change any information, click **Previous**.

4. Click **Create Account** to create the external mail configuration.

   The **Status** page appears. Convergence authenticates the user against the external server and gets the email based on the inputs provided.

   The node is created with the new account information under the External Accounts tree. A new identity is created based on the information provided for the external account. This is available under the Identities tree in Mail preferences. To know more about identity settings, see "How Do I Set Identity Settings for My Local or External Accounts?".

   Click **Finish**.

How Do I Remove an Existing External Account?

To remove an already configured external account, perform the following steps:

1. Select the account that you want to delete from the External Accounts tree. The account information appears on the central pane.
2. Click **Remove Account** at the bottom of the pane. A dialog box appears prompting for a confirmation.
3. Click **OK** to remove the account. The account is removed. The corresponding identity related information for this account is also removed.

Setting Calendar Preferences

This topic answers your questions about how to modify the settings for your calendar. Preferences you can change include appearance of days and weeks on the calendar, event symbols and notification updates.

- How Do I Set General Preferences in Calendar?
- How Do I Hide or Show Declined Events?
- How Do I Set Default Event Types?
- How Do I Set Notifications for Events?

How Do I Set General Preferences in Calendar?

Setting general Calendar preferences lets you to specify preferences that apply to the Calendar features of the application as a whole.

To Set General Preferences, perform the following steps:

1. Click **General**. The **General** tab appears in the central panel.
2. Choose a view from the **Initial Calendar View** drop-down list. Available view choices are:
   - **Day**
   - **Week**

- **Month**
- **Next Seven Days**
- **Agenda**

3. Under the **Calendar Configuration** section, you can set the following options:
   - Choose a day of the week from the **Week starts on:** drop-down list. This option enables you to specify the starting day of the week.
   - Select the days in a week to be included in your work week by selecting the corresponding checkboxes.
4. Choose the start and end time of your standard working days from the **Day starts at** and **Day ends at** drop-down list. The options are listed in 30 minutes increments.
5. You can remember the last selected calendars when you log out of Convergence. To set this preference, select the **Remember Calendar Selections** check box under the **Calendar Selection** section.
6. Click **Save Preferences**.

How Do I Hide or Show Declined Events?

Hiding or Showing Declined Events lets you to specify preferences that apply to Calendar events and invitations.

To set event preferences, perform the following steps:

1. Click **Events**. The Event tab appears in the central panel. The Event tab appears:
   - **Invited Events Filter**: If you want your declined events to be shown when viewing the calendar, select the checkbox corresponding to the **Display Declined Invitations** label.
2. Click **Save Preferences**.

How Do I Set Default Event Types?

Setting Calendar default event types lets you to specify preferences that apply to Calendar events and invitations.

To set default event types, perform the following steps:

1. Click **Events**. The **Event** tab appears in the central panel. The **Event** tab appears:
   - **Default Event Type**: By default, the event type is set to Business. To change the default event type, choose from the options listed in the drop-down box.
2. Click **Save Preferences**.

How Do I Set Notifications for Events?

Setting Calendar notifications lets you to specify how and when you would like to receive notifications for events.

To set notifications:

1. Click **Notifications**. The **Notifications** tab appears in the central panel. The following notification properties appear:
   - **Enable Event Notifications**

    - **Event Invitation Updates**

2. Select the **Enable Event Notifications** checkbox to enable notifications for your events. Once you enable the event notifications option, you can set the following attributes for the event:
    - The time interval before the start of the event. You can set the time interval by choosing from the drop-down list. The following options are available:
        - **minutes**
        - **hours**
        - **days**

      By default, event notifications are set to 30 minutes before the start of the event. However, this value can be changed in the calendar event User Interface.
    - You can receive event notifications in the following ways.
        - **Email**: To receive event notifications by email, select the **Send email message to** option and provide the email address to which you want to be notified for the event.
        - **SMS** : To receive event notifications by SMS, select the **Send SMS message to** option and provide the phone number to which you want to receive the notifications.
            * The format should be as follows:

              `+<subscriber-number>@sms.<example.com>`.

              The `<subscriber-number>` is a phone number where you expect to receive SMS notifications. The format of each `<subscriber-number>` is specific to the SMSC provider.

              `<example.com>` is your domain.
3. Click **Save Preferences**.

6
Multi-Factor Authentication

Multi-factor authentication (MFA), also referred to as two-factor authentication (2FA), is a security process that requires users to provide two or more separate forms of identification before granting access to the application. MFA enhances the security by adding an additional authentication layer beyond the standard username and password, making it more difficult for unauthorized individuals to access sensitive information. By default, MFA is disabled. It needs to be enabled to activate the options. In Convergence, MFA can be set up by using the following:

- Mobile Authenticator
- SMS
- Mail (secondary email address)

> **Note:**
>
> The multi-factor authentication session is valid for 4 minutes, SMS and Mail for 60 seconds and the OTP is valid for 30 seconds by default.
> For more information about:
>
> - Securing your account using secondary email, see "How Do I Secure My Account Using a Secondary Email Address?"
> - Logging into Convergence Using SMS or Mail as MFA, see "How Do I Use SMS or Mail as MFA for Logging into Convergence?"
> - Logging into Convergence Using Mobile Authenticator as MFA, see "How Do I Use Mobile Authenticator as MFA for Logging into Convergence?"

About Using Mobile Authenticator as MFA for Logging into Convergence

This section describes information about using Mobile Authenticator as MFA for logging into Convergence.

In case of any issue with Oracle Mobile Authenticator (OMA), contact your system administrator to reset the old key before re-registering for OMA. You have to register again in Convergence using **Register for Mobile Authenticator**.

> **Note:**
>
> Disable SSO if MFA feature is enabled.

How Do I Register Mobile Authenticator as MFA for Logging into Convergence?

To register Mobile Authenticator as MFA for logging into Convergence:

1. On your mobile, download the Mobile Authenticator app from the app store.
2. Go to the Convergence login page.
3. Enter your username and password.
4. Click **Sign In**.
5. In the **Send Verification Code** field, select **Mobile Authenticator**.
6. Click **Next**.
7. Click **Register for Mobile Authenticator**.
   The **Configure Mobile Application** page appears.

   > **Note:**
   >
   > If you have already registered your Mobile Authenticator, enter your OTP.

   For more information, see "How Do I Use Mobile Authenticator as MFA for Logging into Convergence?"
8. Configure your Mobile Authenticator by performing the steps mentioned on the page.
9. Click **Close**.
10. Enter the six-digit code in the **OTP** field.
11. Click **Verify**.
    After successful verification, you will be redirected to the Convergence UI.

How Do I Use Mobile Authenticator as MFA for Logging into Convergence?

To log in to Convergence using Mobile Authenticator:

1. On the Convergence login page, enter your username and password.
2. Click **Sign In**.
3. In the **Send Verification Code** field, select **Mobile Authenticator**.
4. Click **Next**.
5. Enter OTP.
6. Click **Verify**.
   After successful verification, you will be redirected to the Convergence UI.

   > **Note:**
   >
   > The OTP is valid for 30 seconds.

About Using SMS or Mail as MFA for Logging into Convergence

This section describes information about using SMS or Mail as MFA for logging into Convergence.

For more information about securing your account using an email address, see "How Do I Secure My Account Using a Secondary Email Address?"

How Do I Use SMS or Mail as MFA for Logging into Convergence?

To log in to Convergence using MFA:

1. On the Convergence log in page, enter your username and password.
2. Click **Sign In**.
3. In the **Send Verification Code** field, select one of the following from the drop-down menu:
   - **SMS**
   - **Mail**
4. Click **Send OTP**.

> **Note:**
>
> In case the OTP expires, click **Resend OTP**.

5. Enter the OTP, received on your secondary email or mobile number.
6. Click **Verify**.
   After successful verification, you will be redirected to the Convergence UI.

About Resetting Your Password using MFA

This section describes information about resetting your password using MFA.

If you have forgotten your password, you can reset it. Password reset is protected by OTP verification using different services like SMS, Secondary email or Oracle Mobile Authenticator (OMA). If you want to reset your password using OMA, you need to register for OMA after logging in. Unregistered users cannot verify the OTP using Mobile Authenticator.

How Do I Reset My Password?

To generate a new password:

1. On the Convergence login page, click **Forgot Password**.
   Note: The password reset functionality is protected by One-Time Password (OTP).
2. Enter your **Username**.
3. Click **Verify**.
4. After verifying your email address, select a two-factor authentication method from the available options, such as SMS, email, or a mobile authenticator, depending on the services enabled by your site administrator.
5. Click **Send OTP** if you choose SMS or email. For the Mobile Authenticator, click **Next**.

A One-Time Password (OTP) will be sent to your registered mobile number or configured secondary email ID. For mobile authenticator, the OTP will be displayed in your mobile authenticator app.

6. Enter the OTP for verification.

> **Note:**
>
> In case the OTP expires, click **Resend OTP**.

7. Click **Verify**.
8. In the **Password** field, enter new password.
9. Click **Change Password**.
   You have successfully reset your password.