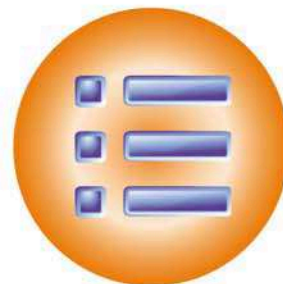
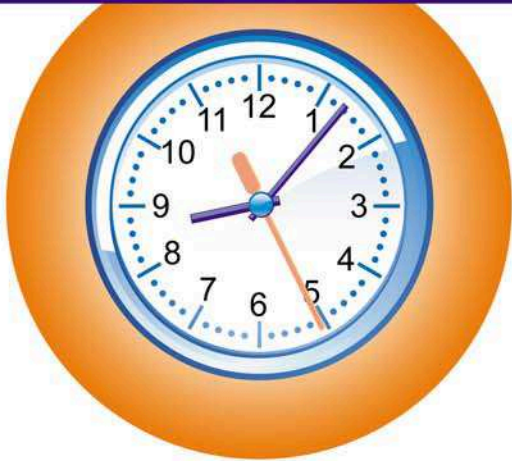


e.GroupWare

open style of team management



Manual eGroupWare 1.4

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November 2007

Table of Content

1. What is eGroupWare.....	10
2. Installing eGroupWare	11
2.1. Setup requirements	11
2.2. Downloading and unpacking eGroupWare package	12
2.3. eGroupWare setup	13
2.4. Updating the Installation	21
3. Admin	22
3.1. Site configuration.....	22
3.2. User accounts.....	24
3.3. User groups.....	25
3.4. Applications.....	27
3.5. Global categories.....	27
3.6. Change homepage message.....	28
3.7. View sessions.....	28
3.8. Login control and access protocol.....	28
3.9. View error log.....	29
3.10. Find and register all application hooks.....	30
3.11. Asynchronous timed service.....	30
3.12. PHP information.....	32
3.13. Custom fields.....	32
3.14. Handbook configuration.....	33
4. Login.....	34
5. Home	35
6. General menu.....	36
6.1. Homepage Home.....	36
6.2. Preferences.....	36
6.3. Manual / Help.....	39
6.4. Logout.....	39
7. Quickstart.....	40
7.1. General.....	40
7.2. Addressbook.....	44
7.3. Calendar.....	47
7.4. FeLaMiMail.....	54
7.5. Infolog.....	61
8. Addressbook	66
8.1. Site Configuration by the administrator.....	67
8.2. Addressbook preferences.....	68
8.3. Categories.....	69
8.4. Edit categories.....	69
8.5. Addressbook interface.....	70
8.6. Access rights.....	73
8.7. Grant access.....	73
8.8. Organisation view in the addressbook.....	74
8.9. View contact.....	76
8.10. View all contacts in an organisation.....	78
8.11. Editing a contact.....	78

8.12. Adding a contact.....	79
8.13. Deleting a contact.....	79
8.14. Adding an email sender to the addressbook.....	79
8.15. Printing a contact.....	80
8.16. Searching for a contact.....	80
8.17. Exporting contacts.....	81
8.18. Importing contacts from CSV file.....	82
8.19. View Infolog entries of selected contacts or organisations.....	82
8.20. Distribution lists.....	83
8.21. Document templates with incorporated contact details.....	84
8.22. Granting access to personal addressbook.....	85
9. Calendar	86
9.1. Site configuration by the administrator.....	87
9.2. Custom fields set by the administrator.....	87
9.3. Holiday management by the administrator.....	88
9.4. Calendar preferences.....	89
9.5. Access rights.....	90
9.6. Switching between different views.....	90
9.7. Adding an appointment.....	95
9.8. View an appointment.....	100
9.9. Editing an appointment.....	101
9.10. Moving an appointment by drag&drop.....	102
9.11. Deleting an appointment.....	102
9.12. Search for an appointment.....	102
9.13. Importing appointments.....	103
9.14. Exporting appointments.....	103
10. FeLaMiMail	104
10.1. FeLaMiMail preferences.....	104
10.2. Manage email accounts.....	105
10.3. FeLaMiMail main screen.....	106
10.4. Reading messages.....	107
10.5. Replying to messages.....	109
10.6. Forwarding messages.....	109
10.7. Printing messages.....	110
10.8. Deleting messages.....	110
10.9. Sorting messages in folders.....	110
10.10. Composing messages.....	111
10.11. Emptying the trash.....	113
10.12. Managing signatures.....	113
10.13. Managing folders.....	114
10.14. FeLaMiMail filter rules.....	117
10.15. Vacation notice.....	119
10.16. Forwarding.....	119
11. InfoLog	120
11.1. Site configuration.....	121
11.2. Generating Infolog forms.....	123
11.3. InfoLog Preferences.....	123
11.4. Grant access.....	125
11.5. InfoLog interface.....	126
11.6. InfoLog type.....	127
11.7. Group owners of Infolog types.....	129

11.8. Search for an Infolog entry.....	129
11.9. Creating an InfoLog entry.....	130
11.10. Creating new links.....	132
11.11. Attaching a file to an InfoLog entry.....	133
11.12. Editing an InfoLog entry.....	134
11.13. Deleting an InfoLog entry.....	135
12. Tracker	136
12.1. Tracker configuration.....	136
12.2. Tracker access rights.....	138
12.3. Tracker preferences.....	139
12.4. Tracker interface.....	139
12.5. Editing a Tracker entry.....	141
12.6. Importing tickets from the TTS.....	142
13. ProjectManager	143
13.1. ProjektManager administration.....	144
13.2. ProjektManager preferences.....	145
13.3. ProjektManager menu.....	148
13.4. Project list.....	148
13.5. Element list	152
13.6. Gantt chart.....	157
13.7. Pricelist.....	159
14. Timesheet	162
14.1. Viewing Timesheets.....	163
14.2. Editing Timesheets.....	164
15. Synchronisation.....	165
15.1. SyncML.....	165
15.2. Synchronisation with mobile phones.....	166
15.3. Synchronising eGroupWare with Funambol client.....	167
15.4. Synchronising with Synthesis client.....	168
15.5. Synchronising Thunderbird address book with eGroupWare using GroupDAV	169
15.6. Synchronising Thunderbird calendar with eGroupWare using iCalServer.....	170
16. Wiki	171
16.1. Wiki preferences.....	172
16.2. Viewing Wiki pages / Read mode.....	172
16.3. Editing Wiki pages.....	172
16.4. Show editing history.....	173
16.5. Using Wiki.....	174
17. Filemanager	175
17.1. Filemanager overview.....	175
17.2. Filemanager configuration.....	176
17.3. Filemanager preferences.....	176
17.4. Filemanager grant access.....	177
18. Bookmarks	178
19. News Admin	179
19.1. Site configuration.....	180
19.2. News Admin preferences.....	180
19.3. Writing news.....	181
19.4. Configuring news access rights.....	182
19.5. Configuring RSS Export.....	182

20. Polls	183
21. Knowledgebase	184
22. Notes.....	186
23. Further information and links.....	188

1. What is eGroupWare

Mature and well protected

Since its launch in 1999, an international development process including 68 developers ranging from the USA, The Netherlands, Germany and Australia has made eGroupWare into a comprehensive Groupware solution.

No license costs

eGroupWare is an Open Source Project which can be used license free. The applications are subject to the GPL license (General Public License GLP 49). As the user, you save on the cost of upgrades as well as expensive administrative costs.

Supported by professionals

By using eGroupWare you receive professional support (www.egroupware-support.eu). Professionals are there to help you with implementation and routine operations. You receive:

- Conceptual design and implementation
- Hotline and 1st level support
- 2nd level support
- Updates and patches
- Individual customization

Freely available and flexible

You can use eGroupWare as a platform for effective teamwork, since it offers optimum and versatile applications which function in an interlinked structure.

Your eGroupWare system can be customized to fit your individual needs – either in your company or through our developers. eGroupWare can be integrated into nearly any IT-landscape and serviced by all current browsers.

eGroupWare is already running successfully in systems with more than 2000 network users.

EGroupWare applications

- Address book
- FeLaMiMail
- Calendar
- InfoLog
- ProjectManager
- Wiki
- Content Management Sitemanager
- News ticker
- Tracker
- Polls
- And many more

7. Quickstart

7.1. General

Setting up lists and views

In general, both eGroupWare headers are available to you in all applications:



In the upper blue bar you will find the links on your *Home* page, to the general preferences, the online manual as well as the eGroupWare logout. In addition, you will see the name of the logged in user and the current date. On the right hand side you can add new entries in the applications available to you.



In the white bar just below it you will see the application icons as well as the red log out button. If applicable, you will also see a blue arrow on the far right hand side. This arrow shows that in addition to the listed applications there are others at your disposal which cannot be shown for lack of space. By clicking on the blue arrow you can call these up.

The set up of the window below in the selected application is similar to all the applications: on the left side is the menu bar (provided it has not been hidden in the general preferences) with the specific preferences of the respective application. However, the menu bar is fixed in the calendar and cannot be hidden. On the right side of the screen you will see the list, respectively the view, including information on the application.

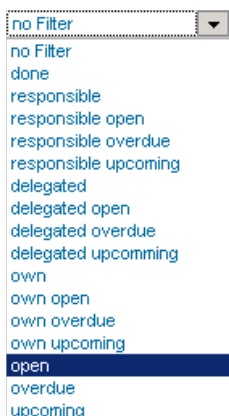
Below the application the actual eGroupWare version is displayed on the small blue bar.

Sorting and filtering

eGroupWare offers you the possibility to sort and filter lists according to predetermined criteria.




Above the respective list (e.g. in address book or InfoLog) there is a blue bar where you can set up categories and filters or search for specific entries per text search. To set up filters or categories open the selection window by clicking on the arrow.

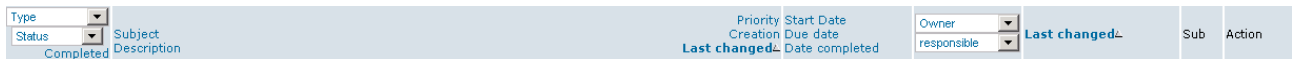


Select the desired filter or category by clicking with the mouse key. The list will be automatically updated according to selected criteria. In the *Search* text field enter a search term or a partial search term such as the first letters in a name. Click on *Search* or press the enter key to search the respective terms in the list which contain the term or letters entered. It is important to remember that the software will seek to exactly match your request with the content of existing entries – a blank space or spelling mismatch can mean that your entry may not be found. Therefore, it is recommended to keep the search term as simple and clear as possible. All fixed filters or categories are combined with each other and remain current till you reset the selection to *all*, or *none/no filter* respectively.

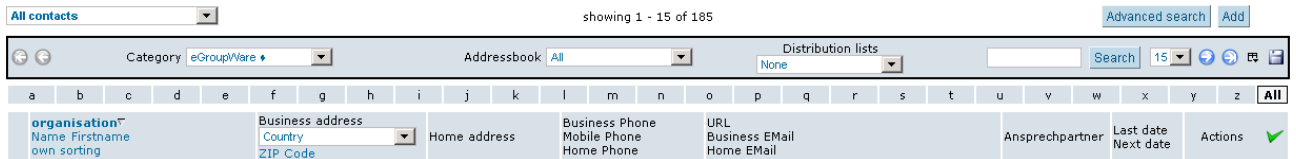
Furthermore, you will find blue arrows on the left and right which will help you scroll through the lists:

right  means scroll forward a page, click on *last*  to view the last page of the list. The arrows on the left side allow you to scroll back on the list.

On the right side of the bar is a small symbol marked *Select columns* . Clicking on it will direct you to a popup window where you can select the columns you want displayed by checking them off. Press *Save* to apply the changes and update the list.




The header in each eGroupWare list allows you to sort according to your needs. In principal, you can sort according to any and all terms which are shown in blue on your header. By clicking on the desired term the sorting of the list will be updated. The current sorting criteria is shown in bold. A small arrow behind the selected criteria indicates whether the list is currently sorted in ascending or descending order. You can reverse the sorting order by clicking on the term a second time.



In the addressbook application you can also search according to certain initials: By clicking on the desired letter you will see all entries which fit your current search criteria (e.g. name) and begin with letter selected. Important: in this case as well the letter filter remains in place until you reset it to *all*.



Navigation Calendar

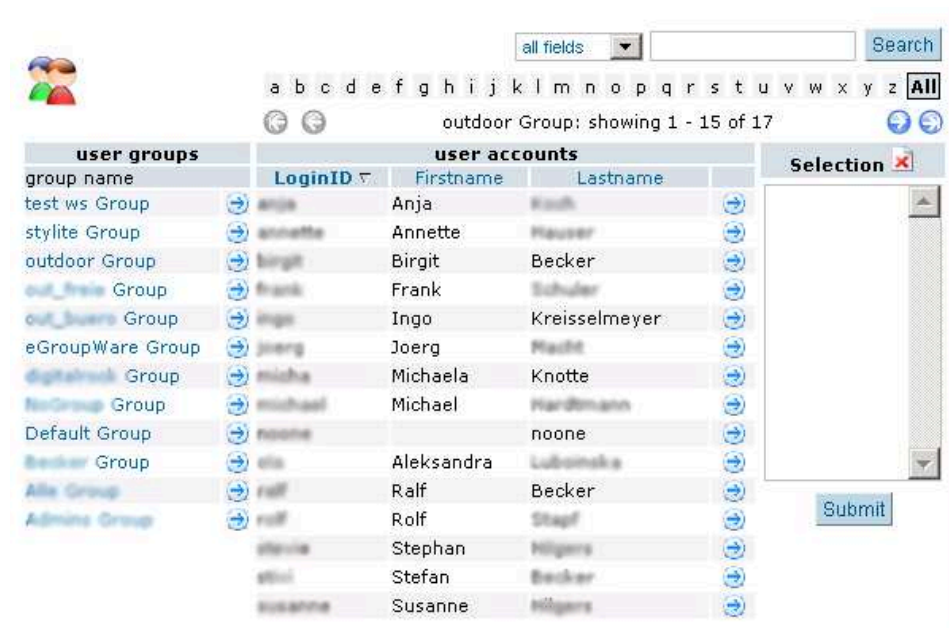
October 2007							
Today							
wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
40	1	2	3	4	5	6	7
41	8	9	10	11	12	13	14
42	15	16	17	18	19	20	21
43	22	23	24	25	26	27	28
44	29	30	31	1	2	3	4
45	5	6	7	8	9	10	11


In eGroupWare there are so-called navigation calendars in various places (e.g.: on the left side of the calendar application or by clicking the *Select date* symbol ). In each of these calendars you will see one month displayed. By clicking the single arrow in the gray bar of these calendars you can scroll through upcoming (right) or previous (left) months. The double arrow allows you to scroll through the years. Hold down the left mouse button on the arrow to see a selection window where by continuing to hold down the left mouse button you can make a quick selection. By releasing the button the display will be matched to your selection. The year dates are shown in increments of two (even and odd). Clicking a second time allows you to change the display. By clicking *today* the Navigation Calendar automatically resets to the current date. To make a selection just click on the desired date and it will be automatically taken over and inserted in the respective spot. Your calendar view is now adjusted.

Selecting users

In many places throughout eGroupWare there is the possibility to select several users. This means that you can choose to view the appointments of certain users or delegate tasks in InfoLog to specific users. Follow this pattern to select users:

In the appropriate selection window choose the target person or group by clicking and the selection will be implemented. If you would like to select more than one person or group, click on the 'address' button  at the right next to the window or in InfoLog on the *Search users* button . In the open window you will see a layout divided up into three columns:



The left column will show all of the groups for which you have read access privileges. Click on the name of the group and in the middle column you will see displayed the names of all the users assigned to this group. Adjacently, there are blue arrows located behind the names. By clicking on the arrow behind the requested name it will be applied in the selection field in the right column. This also allows you to include different individuals in your selection. If you wish to select a special group, you can directly apply all the users of this group by clicking on the blue arrow located behind the group in the selection window. Users to whom you have no access privileges will be shown at the top of the window in red. To delete an entry in the selection window mark the applicable entry by clicking, or holding the control key down to mark multiple entries, and then go to the delete symbol .

Links

In eGroupWare you have the possibility to interlink information from various applications as well as to attach external data. On the one hand this permits quick access to information for a specific event, on the other hand it saves you the time consuming process of saving the same information in multiple locations.

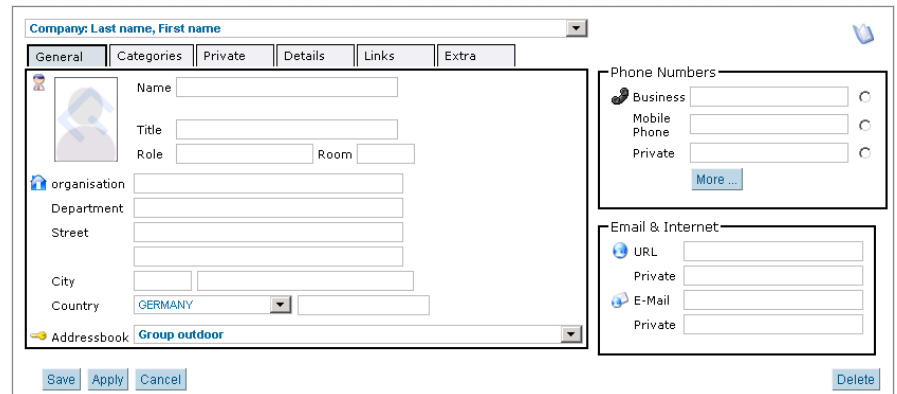
For example, you can interlink all operations and data which concern a specific client with the client database in the address book. By clicking on the client in eGroupWare's address book all related entries in the InfoLog are displayed at a glance beneath the address file. All other links from different applications such as appointments from the calendar and other entries from the address book are listed in the *Links* tab in the client's address file. By clicking one of the entries on the list you will automatically be taken to the corresponding entry where you can view the details. Consequently, you can call up all pertinent information in an instant, perhaps such as when taking a call, and all from one place.

7.2. Addressbook

Adding and editing contacts

To add a new address click on “Add” on the address book homepage. This will bring you to a blank address file card where you can input your information. Each address file card is subdivided into different areas, also called *sliders* or *tabs*:

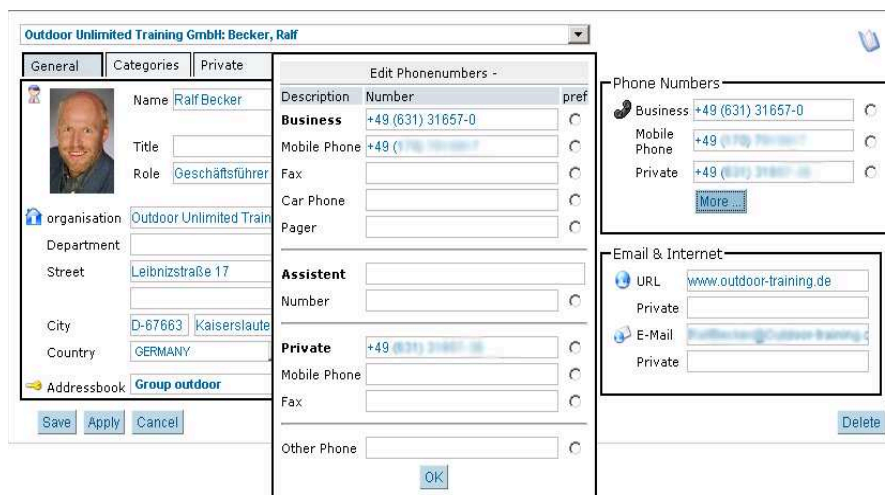
In the following tabs you have the possibility to add information and notes to the contact: *General*, *Categories*, *Private*, *Details* and *Extra*.



Under *Links* you can link data from another application (such as an appointment from the calendar) with an address or attach existing files (such as directions, orders or invoices) to an address. To do this, select the respective information through the search function and then click on *Link* or, alternatively, *Attach*.

The selection window above the tabs refers to the data according to which your new entry will be arranged on the list – select the combination according to your needs. By ‘saving’ the new address you will return to the address book homepage. The new address is now included on the list overview

To edit an existing address select “Edit” behind the respective address in the command column.

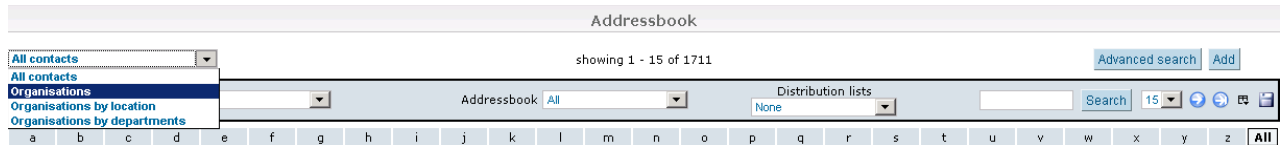


You will get to the address card file where you can make your changes and additions. By clicking on “Save” the new data will be recorded in the system and you return to the address overview list.

View address information for an organisation

The address book offers you the possibility to assign an organisation (a company) different address data under their name (e.g.: different locations, departments or contacts). The individual addresses are attributed as soon as the name of the organisation matches the entries.

To display individual entries for an organisation select the *Organisations* option above left in the selection window instead of *All contacts*.




Now you will see a list of all the organisations you are managing. By clicking on the magnifying glass on the right below the name of the organisation you will get a list of all related entries.

Likewise, by selecting the option *Organisation by location* you will see displayed all of the organisation locations you currently administer. In this regard, the first entry of the respective organisation details all existing entries, while the entries below include data on individual locations.

Accordingly, by selecting *Organisation by department* you get the list of the saved data with respect to the various departments.

IMPORTANT! Individual entries made to an organisation occur on the basis of an organisation's name. Therefore, it is crucial to use consistent spelling! By using different spelling (including upper and lower case letters, blank spaces, etc.) the system considers these different organisations! Therefore, we recommend that new entries for existing organisations always be undertaken using Auto entry (see "Add address entry to organisation").

Adding an address to an organization


Adding address information for a specific organization requires the consistent spelling of the organization's designation. Therefore, it makes sense to make new entries using the 'Add' function. To do this, select the organization view in the selection field situated in the upper left. Search for the desired organization on the appropriate list and click 'Add'  in the command column on the right.

You will automatically be directed to an address card file where you can create a new data set. An advantage to this approach is that all of the organization's pertinent information is already automatically entered, which also prevents different spellings.

Accordingly, the new data set will be applied in the 'organization view according to location', or alternatively in the 'organization view according to department'.

View all InfoLog entries linked to an address

With eGroupWare you have the possibility to link information (such as telephone notes, tasks, documents or even emails) through InfoLog directly with the address. Accordingly, you can have all InfoLog entries displayed associated with an organization. This, for instance, permits you to link previous events to a client's address. When you need to contact the client again all of the information is available at a glance.

In one of the organization views select the organization you are looking for. In the command column on the right you will find the InfoLog button . Clicking on it directs you to the list including all InfoLog entries linked to this organization. When you click "Add" to create a new entry this entry is again automatically linked to the organization.

Availability of different address books

Multiple addressbooks are at your disposal with eGroupWare, including private and personal address books for every user. In addition, group



address books can also be set up by the administration. Select the address book you need access to from the selection box at the top of the page in address book .

Access privileges for all address books are held by the respective owner of the address book, thereby offering considerable flexibility.

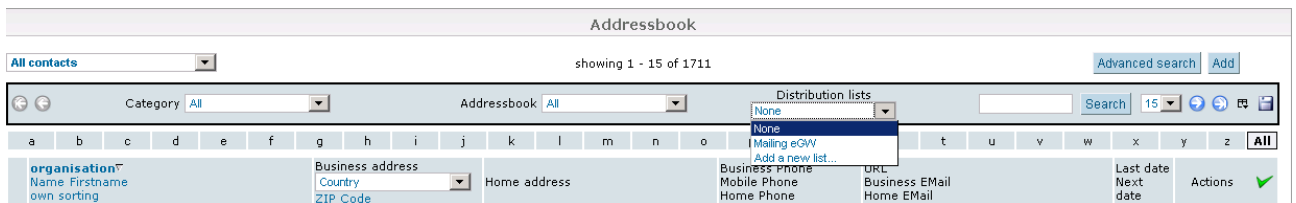
As the owner of your personal address book you can, for example, grant access to other users by going into the address book preferences under *Grant access* and accord the privileges to the respective person or group. The assignment of privileges only works in one direction – accordingly you can receive different rights from other users for their personal address books by having those users grant you the same privileges.

Privileges regarding group address books are accorded by the entire group – this can be done in consultation with the administration of the user group. Here again the assignment of privileges takes place solely in one direction. Should reciprocal privileges be set up, the other participating groups must also actively grant the requested privileges.

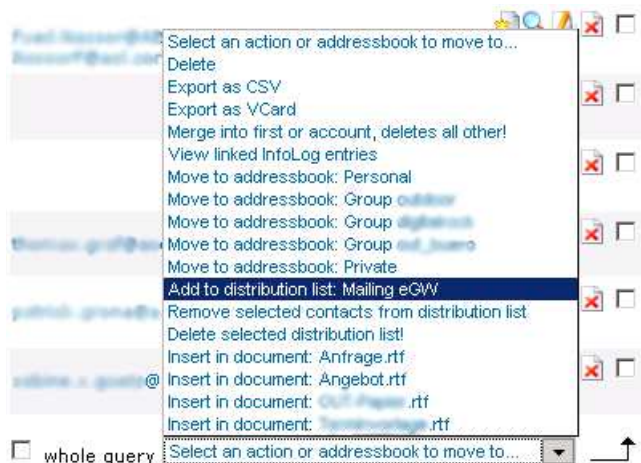
The exception to this is the private address book. In this regard, no privileges can be accorded – information may only be viewed and edited by the user concerned. If your private address book is not automatically displayed in the address book selection box, you can enable your personal address book in the address book preferences under *Preferences*.

Creating distribution lists

In the sorting bar above the address lists you will find the selection window *Distribution lists*.

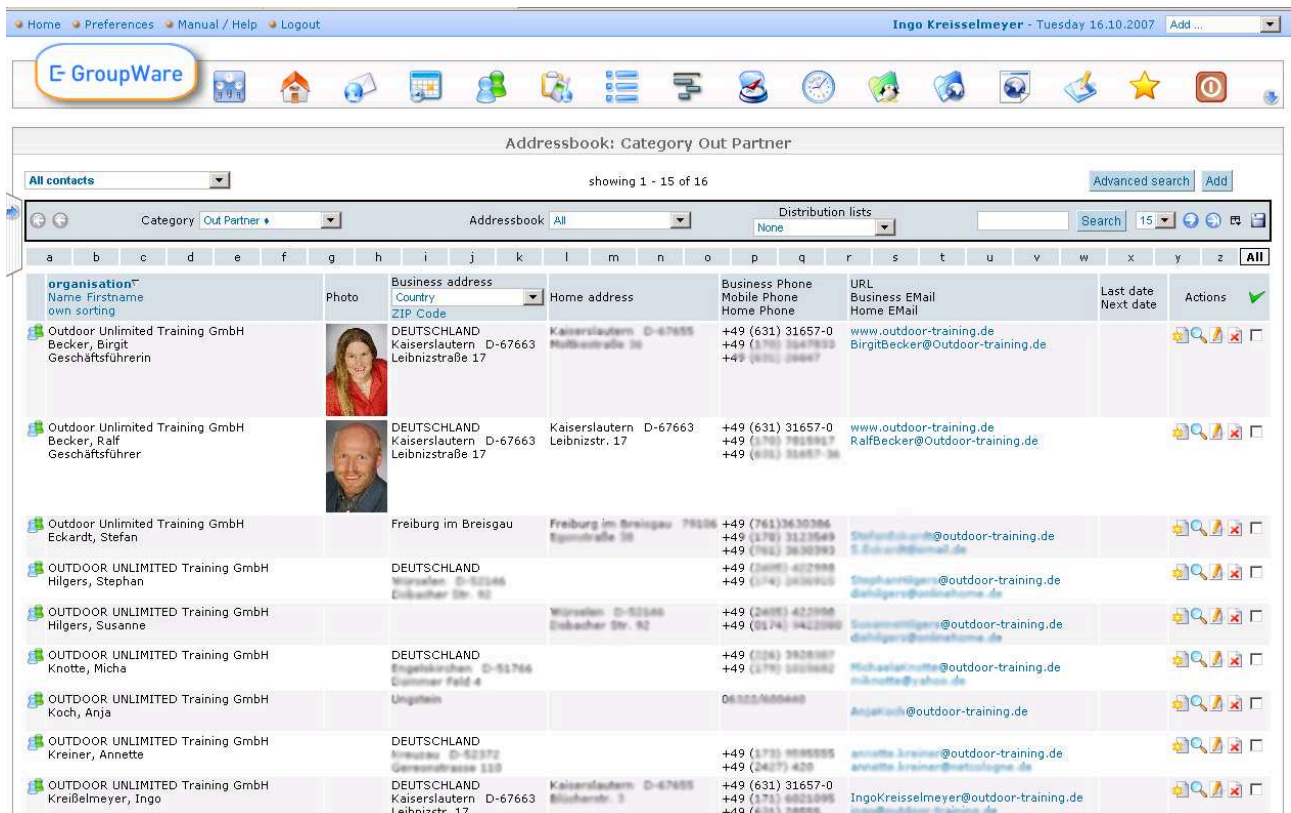


To create a new mailing list select *Add a new list*. Input the name of the new mailing list in the popup window and click *Save* to apply the new mailing. This list will now be included in the applicable selection box called *Distribution lists*. Now highlight the desired addresses in the address book and open the selection window named *Select an action or addressbook to move to* below the address book list at the right. Select the command *Add to distribution list (name of the list)*. Once the marked addressbook entry is applied the system provides you notification above the list on how many contacts were added to the mailing list in question.



To call up the distribution list simply select the list you want in the selection window *Distribution lists*.

8. Addressbook







The screenshot shows the eGroupWare Addressbook interface. At the top, there is a navigation bar with 'Home', 'Preferences', 'Manual / Help', and 'Logout'. The user is identified as 'Ingo Kreisselmeyer' on 'Tuesday 16.10.2007'. Below this is a toolbar with various icons for navigation and actions. The main area is titled 'Addressbook: Category Out Partner' and shows a list of 16 contacts. The list is filtered by 'Category: Out Partner' and 'Addressbook: All'. The contacts are sorted by 'Name Firstname own sorting'. The table columns include: Organisation, Name, Firstname, Photo, Business address (Country, ZIP Code), Home address, Business Phone, Mobile Phone, Home Phone, URL, Business EMail, Home EMail, Last date, Next date, and Actions. The contacts listed are: Birgit Becker, Ralf Becker, Stefan Eckardt, Stephan Hilgers, Susanne Hilgers, Micha Knotte, Anja Koch, Annette Kreiner, and Ingo Kreisselmeyer.

The addressbook is an application to manage contact information that can be linked to other eGroupWare applications.

You can export or import contacts through various formats such as Vcard or CSV and manage and secure your contact information through SQL or LDAP respectively.

In the 1.4 version of this application a superordinate company structure was added to **Person related contacts**. This organization view, however, is only available under SQL (only in read mode with LDAP).

In addition, you can select from different address books in version 1.4:

- **Group addressbook** : Your eGroupWare administrator can set up a group address book for any group giving the applicable access privileges.
- **Personal addressbook** : Every user has a personal address book to which they may grant access to colleagues in **Addressbook menu** under **Preferences**.
- **Private addressbook** : You can activate your **private addressbook** in the addressbook preferences. If this option is not available consult your system administrator (the administrator can make this option available or not).
- **User accounts** : Here you will find the addresses of all your eGroupWare user. As a rule, only system administrators have write permission on this address book! When configuring the application the administrator may determine which fields a user can change for his/her own account.

We generally recommend that you maintain your addresses in group addressbooks so that the addresses can be used together!!!

You can select in your addressbook preferences in which addressbook you want to store new addresses (this can also be preset or required by the system administrator).

A further improvement in version 1.4 is the functionality of the distribution lists. As of version 1.4.002 there will also be the possibility to create document templates in which you can input contact information through the use of placeholders. This will allow you to standardize such things as cover letters, offers as well as invoices, saving you from having to manually input address information.

8.1. Site Configuration by the administrator

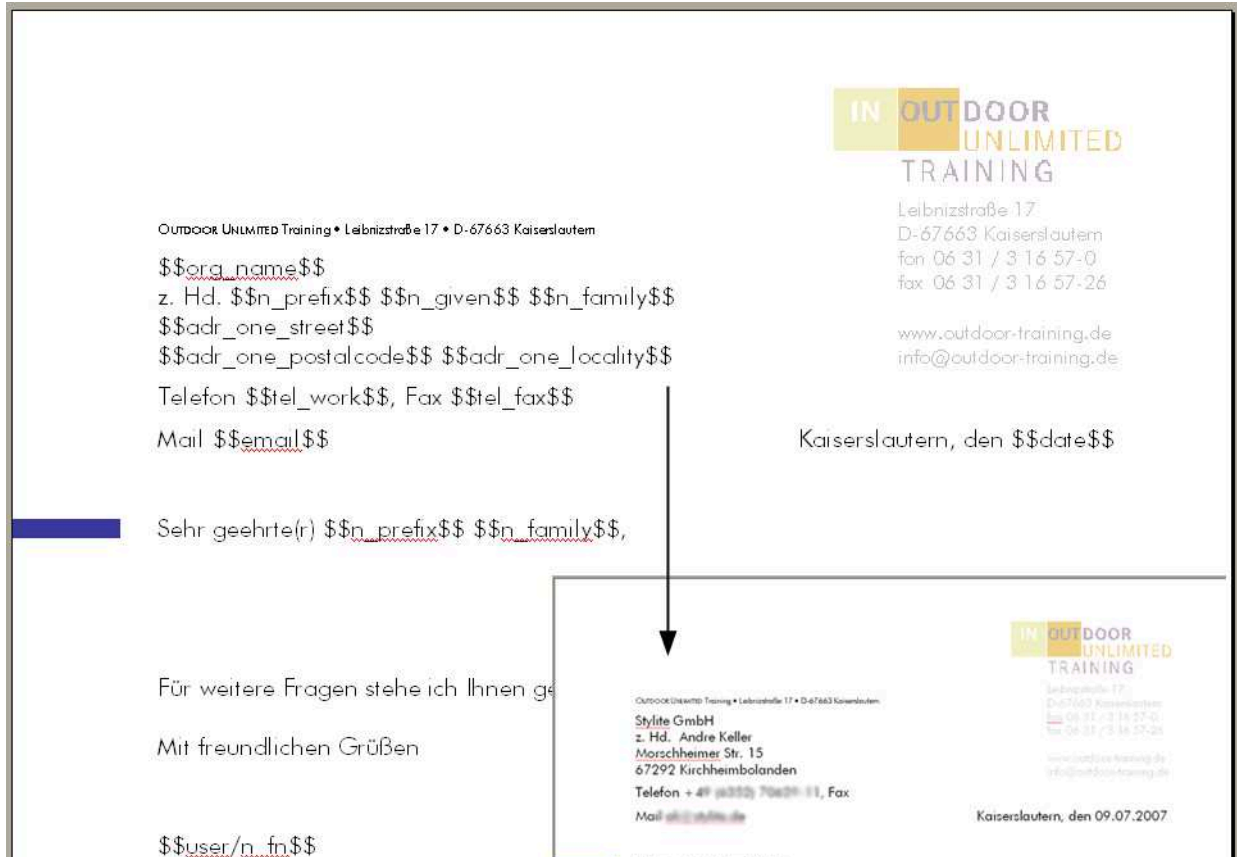
As System administrator you can configure the addressbook. The following options are at your disposal:

- **Telephony integration**
 - Input field **URL to link telephone numbers to** : use %1 = number to call, %u = account name, %t = account phone
 - Input field **Size of popup**: WxH, eg.400x300, if a popup should be used
- **Allow users to maintain their own account-data** , i.e. a user may **edit the following fields** on their own: This regards a multi selection box in which all fields a user may edit on their own need to be checked off . If you don't mark anything here, you also may not edit your own address!
- **General**
 - **Use an extra category tab?** : Selecting **No** means the categories in **tab Details** will be displayed
 - **Security**: How many contacts should non-admins be able to export (empty = no limit)
 - **Contact repository** : You can decide where you want to store addresses: **SQL**, **LDAP** or **SQL-->LDAP read only**
Important: You may only use LDAP to save contacts if the user accounts are also saved in LDAP!
Storage location for user accounts: LDAP (can be changed through Setup >> Configuration)
Important: The new organization view is not available with use of only LDAP!
 - **LDAP settings for contacts**
 - Input field **LDAP host for contacts** : e.g. localhost
 - Input field **LDAP context for contacts** :
 - Additional information about the use of LDAP to save your contact information you can find at egw:addressbook/doc/README
 - **Migration to LDAP**: Select the migration type and press the **[Start] button**
 - **Contacts to LDAP**: Only contacts migrated; user accounts remain untouched.
 - **Contacts and account data to LDAP**: Converts contacts as well as user accounts to LDAP.
 - **Contacts to LDAP, account data to SQL**: Contacts are added in LDAP whereas user accounts are stored in SQL.

Below that are two buttons to **[Save]** or **[Abort]**.

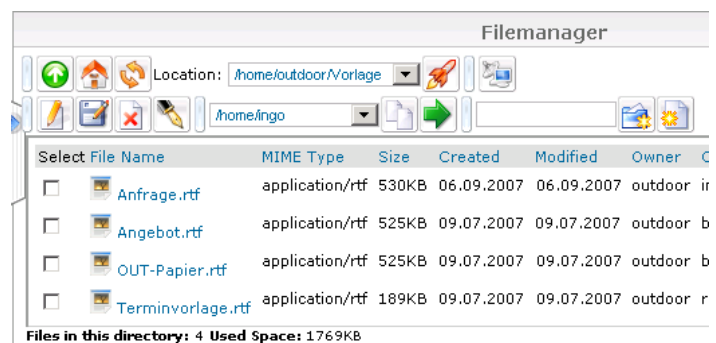
8.21. Document templates with incorporated contact details


As of version 1.4.002 you have the possibility to utilize **document templates** in order to enter contact details in documents through the use of placeholders. This will allow you to standardize such things as cover letters, offers as well as invoices, saving you from having to manually input address information.



Begin by creating a document template with placeholders. Please note that only *rtf* and *txt* documents types are supported at the moment. These can be created and edited in Open Office or Word. For example, in the template enter placeholders instead of an address: `$$n_fn$$` for the *full name* or `$$adr_one_street$$` for the *street (business)*. In the same manner you can also enter the *current date* and the *user name* in the document. Save the template as an *rtf* or *txt* document.

Then load the document in the file manager into a group directory to which all users you are working with have access. If a user does not have access privileges to the directory, he/she will receive a system error message in RED as soon as they try to access the template.



In the text field **Default document to insert contacts** in your address book preferences enter the name and path of the file manager. An additional icon  appears automatically in the address book's main screen which you can use to download the document template with completed contact details for every contact. The system administrator can set up a standard document for all users (as a forced

setting or as a default) or each user can create an individual document template in his/her personal settings.



In addition, you can indicate in your addressbook preferences in the text field **Directory with documents to insert contacts** a directory in the file manager in which other templates can be saved. This will only appear on the address book main screen in the selection box below the address list.

Mark the desired contact (at the moment only single selection possible) and in the selection box choose the required template in which the contact details are included. Then you can download the document at which time the placeholders are replaced with the data from your eGroupWare. This document can be edited in Open Office or Word.

Similarly, it is planned in a next step to be possible to create and send form letters and serial mails.

The list with all the placeholders (see link in the addressbook preferences) can be used to look up all possible replacements. There, in addition to the contact information, you also have the possibility to input general information such as the current date or the user name directly into the document. Moreover, you can access appointment information (e.g. title, description, start date, duration or category) in the document linked to this address. This allows you to create, for instance, a list detailing a recent appointment with a particular client.

8.22. Granting access to personal addressbook

In the preferences you can set the access rights according to your needs in the various applications (such as address book, email, InfoLog, calendar, etc.) independently of each other, as long as you have the required access privilege. Otherwise consult your system administrator. In the address book these rights always refer to your **personal address book**.

You can grant access independently of each other to:

- Groups: Set access rights for an entire user group
- Users: Set individual access rights for each user

There are various sections for which you can grant or deny access:

- Read: Allows other users to read the contacts in your personal address book.
- Add: Allows other users to add contacts into your personal address book.
- Edit: Allows other users to edit contacts in your personal address book.
- Delete: Allows other users to delete contacts from your personal address book.

A checkmark in the applicable box means that access is granted and a blank box means access is denied.






9. Calendar














Efficient and powerful calendar / planner including appointment management and ACL driven access authorization (i.e. users have access only to information to which they have the required access privileges. This is controlled by the system administrator). The new version has been completely reprogrammed by Ralf Becker using eTemplate. Applications programmed with eTemplate always provide a help text in your browser's footer.

Navigation throughout the entire calendar takes place on the left by way of the calendar menu and the 'navigation calendar'. Select the applicable date and then use the icon to switch to the desired view.

You can switch among the different calendar views using either a selection box or the applicable icon:

-  shows the current day (today) in the day view.
-  shows the current week (this week) in the week view. In the calendar preferences you can choose whether you want to include weekends in the display or not. Both variants are available in the selection box.
-  shows the current month (this month) in the month view.
-  shows at a glance all appointments scheduled for multiple users and categories as a group planner. It offers simple appointment management for work groups. You can choose from:
 - **Planner by category:** Shows a group planner listing all categories below each other. It is also possible to have a day or week view.
 - **Planner by user:** Shows a group planner listing all users below each other; categories are shown in different colors. It is also possible to have a day or week view.
 - **Planner by resources:** Shows a group planner listing all resources below each other. Categories are shown in different colors. It is also possible to have a day or week view. Important: Only works if the resources application is installed and enabled.
-  shows all appointments in a list view (table); these can be sorted or filtered according to various criteria.

In the various calendar views moving over an appointment with your mouse displays the most important information as a tooltip. The following icons are used for appointments and tooltips:

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

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