

FirstClass Training Participant Guide



FIRSTCLASS®

Education & Training

FirstClass 12 Web Client

V12.002

FirstClass[®] Web Client

Client Guide

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The FirstClass 12 Web Client

Summary



In this module, you will learn about how FirstClass 12 can:

- deal with mail overload
- expose information that would otherwise be hidden in private email exchanges
- share files
- find others in your organization
- keep up with what's going on
- access information with your mobile device.

Introduction

FirstClass 12 brings together all of the social tools that have defined the modern internet into a safe organizational framework, where ideas prosper, knowledge is enhanced, and employee productivity thrives. This powerful Web 2.0-style solution has been designed to enable organizations to work faster, smarter, and more productively by connecting knowledge workers to the people and content important to them within a secure, collaborative, community-based environment.

With FirstClass 12 you can:

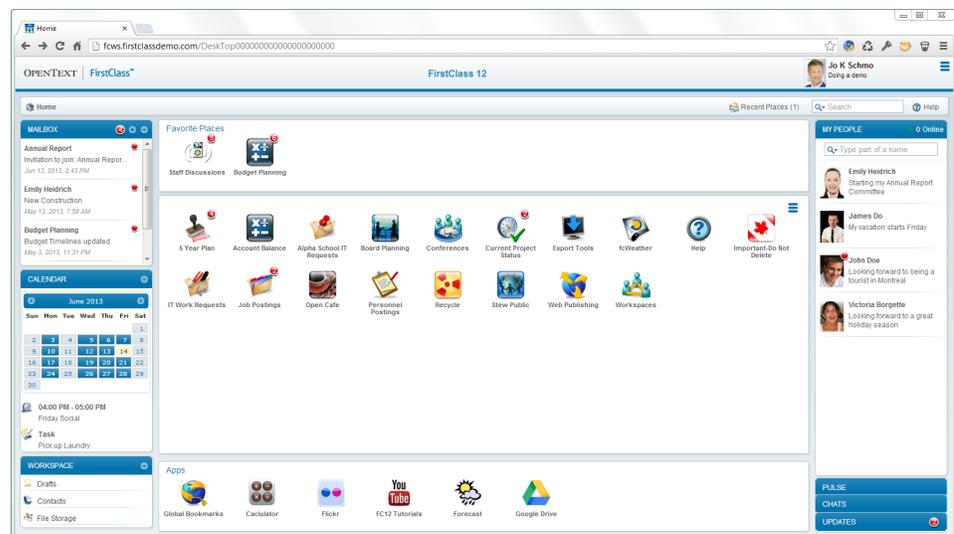
- Relieve the stress of email overload
- Let ideas and content flow between internal and external stakeholders
- Reveal people, content, and collaborative containers with social search
- Make your content a social object
- Fast track knowledge transfer and productivity
- Reduce the risk of inappropriate disclosure
- Engage the next generation workforce

Dealing with mail overload

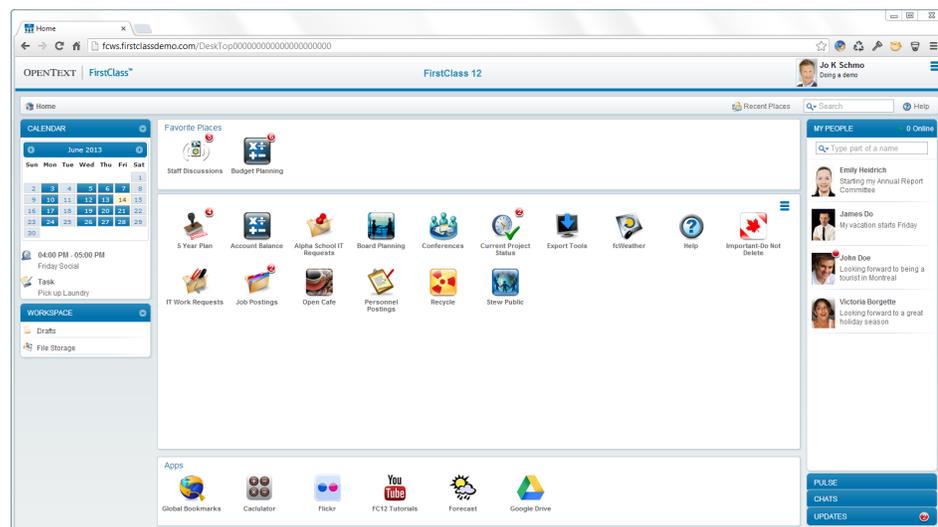
With FirstClass 12, your system administrator may choose to assign a mailbox if you wish to use FirstClass as your all-in-one solution. If, however, you are using another email system, FirstClass 12 will allow you to still use your existing email system, but use FirstClass as your collaboration and secure social networking tool.

If you're used to using an email product that simply lets you exchange private messages with others, you know how quickly your inbox fills up. Some of those messages are important, some are of interest, and the vast majority are marginal or outright spam. And the only way to sort out the good stuff is to wade through all of it.

With FirstClass 12, you don't have to dump everything in your inbox. You use FirstClass 12 to post to online conferences and communities. Each container deals with a particular subject, such as 'Budget Planning'. Your system administrator can subscribe you to certain conferences or communities based on your group classification, or you just join the communities that interest you, and that immediately sorts out all that marginal stuff.



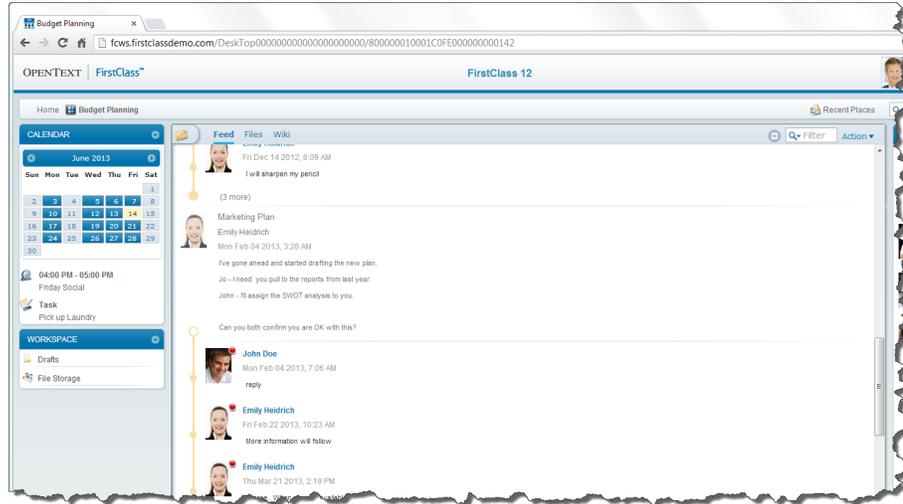
User with Mailbox



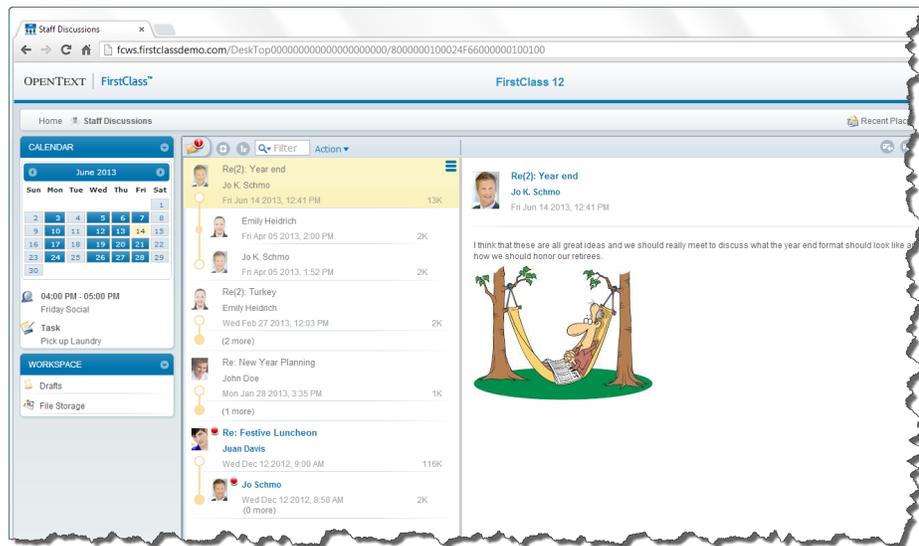
User without Mailbox

Exposing information

FirstClass 12 collaborative containers don't just shield you from mail overload. Others who are interested in that same Budget community will also join it. They'll see everything you post, and you'll see all their responses plus everything they have posted.



A FirstClass Community



A FirstClass Conference

Sharing files and Wikis

Communities aren't just common posting areas like conferences. You can also store files in a community. Others can download these files, perhaps to update them and then upload them back to the community.

If you'd rather work collaboratively on a document directly in the community, you can create wiki pages there, where everyone can see and update them.

The screenshot displays the FirstClass 12 web client interface for a community named 'Budget Planning'. The interface is divided into several sections:

- Calendar:** Shows a calendar for June 2013 with dates 2 through 29. Events include '04:00 PM - 05:00 PM Friday Social' and a 'Task Pick up Laundry'.
- Feed:** Lists recent activity:
 - Budget Invitation.docx by Jo K. Schmo on Fri May 10 2013, 9:45 AM
 - Planning Timeline by John Doe on Wed Apr 24 2013, 1:45 PM
 - 2013 Budget Work by Jo Schmo on Tue Feb 26 2013, 5:45 PM
- Files:** Shows a file named 'Budget Timelines' by Jo K. Schmo, dated Fri Jun 14 2013, 1:45 PM, with a size of 2K.
- Wiki:** Displays a page titled 'Budget Timelines' by Jo K. Schmo, dated Fri Jun 14 2013, 1:45 PM. The content includes a table:

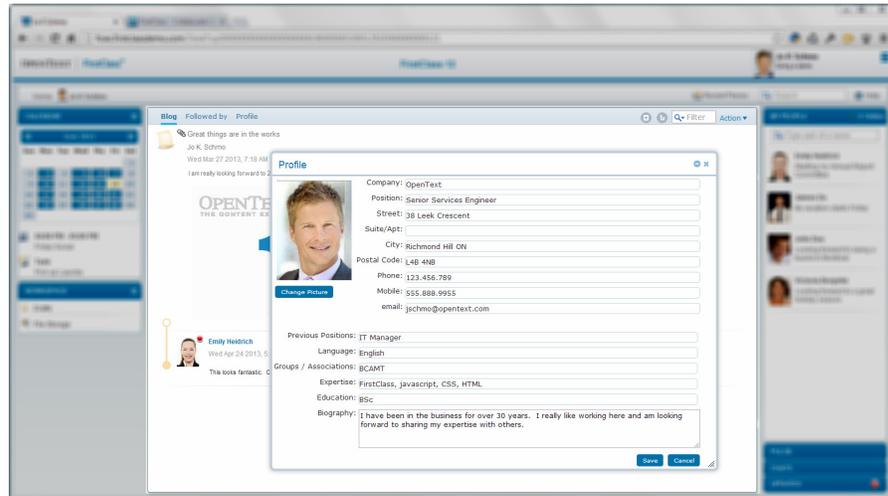
Budget Timelines	
January 2013	Executive members review current budges and changes
March 2013	Executive team reviews all member budget up and finalize for the board
June	Board finalization
- Workspace:** Includes sections for 'Drafts' and 'File Storage'.

The interface also shows navigation options like 'Home', 'Feed', 'Files', and 'Wiki', along with a search bar and a user profile for 'Jo K. Schmo'.

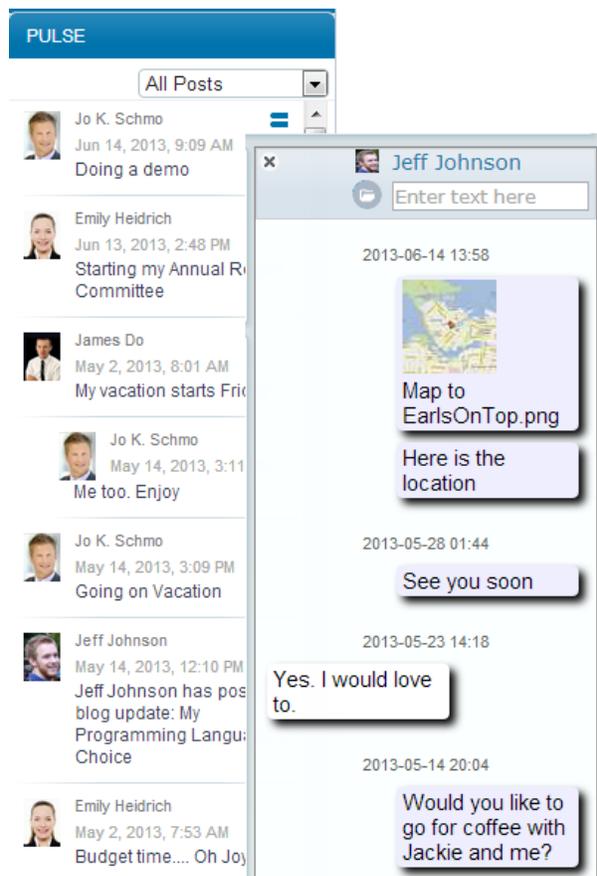
Working Closely with others

So far, we've discussed what FirstClass 12 can do with “things”. But you can't collaborate effectively without keeping track of people, and FirstClass 12 helps you do that, too.

Everyone in FirstClass 12 has a profile that includes information on their background, their picture, and even a personal blog.



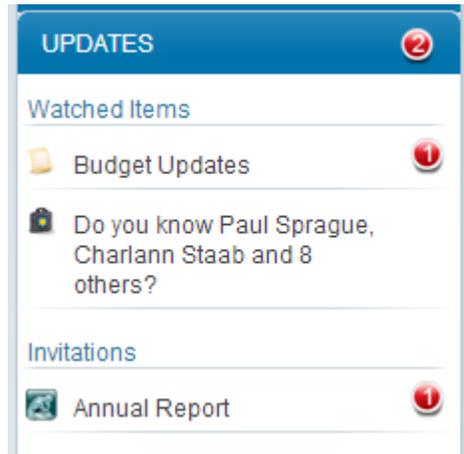
With the Pulse, you get to see all of the status updates and new blog post information as they occur. Need to have direct access? Engage one of your colleagues in an instant message session.



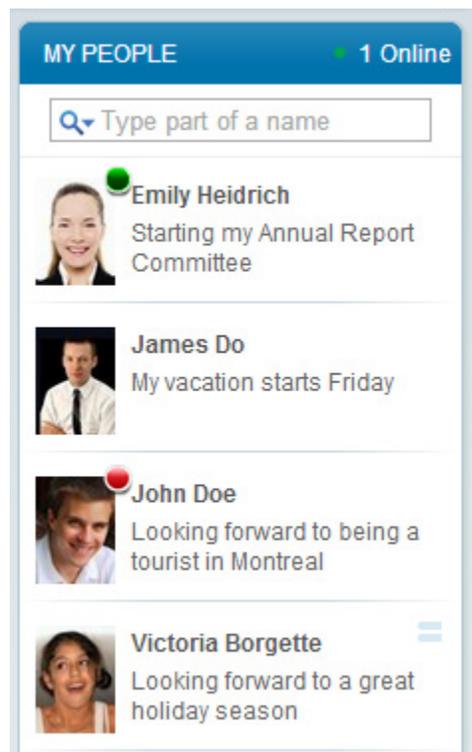
Keeping up

Staying in the loop in a busy organization is a challenge. FirstClass 12 provides tools for tracking activity, both for things and people.

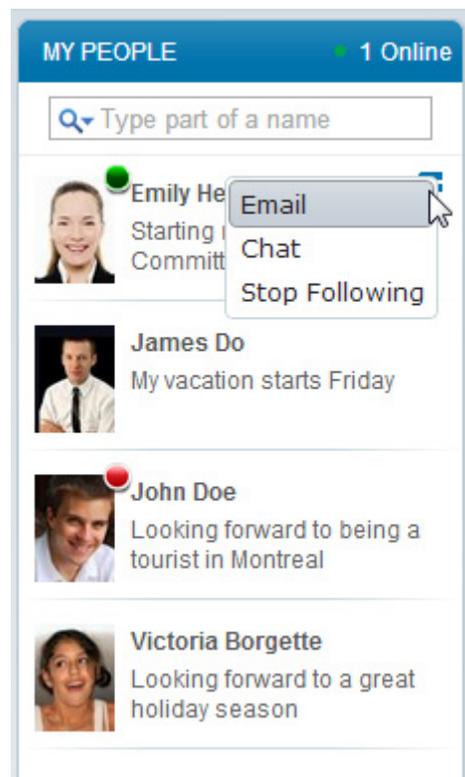
You can flag or 'watch' a post, uploaded file, or wiki page. Every time something changes (for example, a post is replied to or a file is updated), FirstClass 12 tells you.



And you can create a buddy list of all the people whose activities you want to follow. Whenever they update their blogs, you know.



This list also provides a convenient way to contact them by email or instant messaging.



Can't do everything described here?

Conference, calendar and community creators control what actions are available to others in their collaborative containers. You may find, depending on the container, that you aren't allowed to do everything described in this document. If you want to discuss your permissions in a container, contact its creator or moderator.

About FirstClass 12 for web browsers



Note

This help documents all the features available in FirstClass. Depending on how your administrator set up your user account, you may not be able to do everything you read about here. For example, you may be able to read messages in certain areas, but not delete them. If you're not sure whether you should be able to use a particular feature, contact your administrator.

The FirstClass server

FirstClass stores all its information on your organization's FirstClass server. This server is maintained by your FirstClass administrator.

Because your information is stored centrally, rather than locally on your computer, you can access it wherever you have access to a web browser or a mobile device.

FirstClass objects

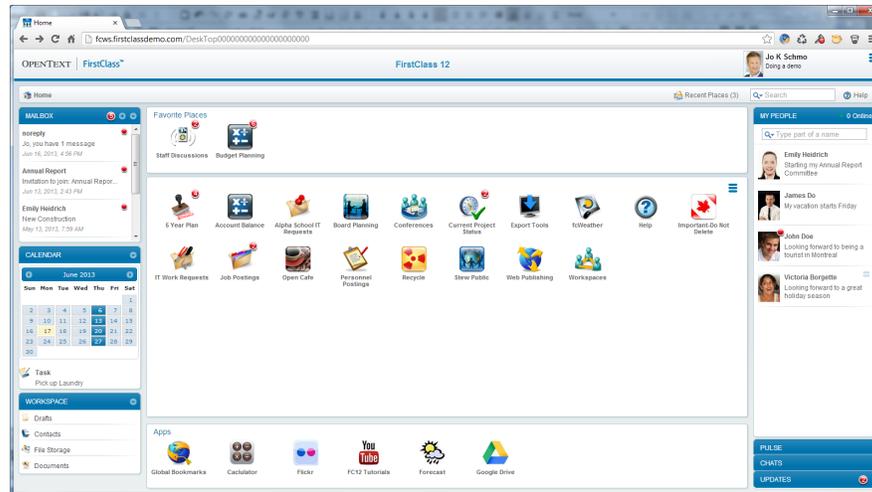
These are the objects you'll work with when you use FirstClass:

- **email messages**
Messages normally expire after a certain period. FirstClass automatically deletes expired objects.
- **documents**
Documents are editable after they have been posted, so people who can see them can update them. By default, documents never expire.
- **uploaded files**
You can upload files such as graphics files so that they are available to other users. These files can be attached to messages or placed directly in containers.
- **folders**
FirstClass folders work just like other folders you are used to on your operating system. You can create and name folders, then put objects such as messages in them to organize your work. By default, objects in folders never expire.
- **conferences**
At first glance, FirstClass conferences look like folders. A conference serves the same purpose of putting related objects in one place, but its focus is to serve as an online forum. For that reason, people who have access to a conference can send messages to it. Conferences display a red dot when they contain unread messages.
- **calendars**
FirstClass calendars contain events, such as meetings to attend, and tasks that you need to complete. In addition to your own personal calendar, you may have access to shared public calendars.
- **contacts**
You can store contact information, such as email addresses and phone numbers.
- **profiles and blogs**
Everyone has a profile to help identify them to other users. Within your profile, you can maintain a blog.

- **chats**
Chats are real-time, online discussions with other users who are currently connected to your server.
- **communities**
FirstClass communities serve much the same purpose as conferences. In addition to containing posts from people who have access, a community can contain wiki pages that everyone can update.

Your FirstClass desktop

All the FirstClass objects that you can access are available through your FirstClass desktop. It's the first thing you see when you connect to your server.



The desktop is divided into panes that contain different types of information. Most of the panes in the sidebars collapse and expand to reveal the information you want to see.

When you click FirstClass objects to open them, they may open in the central pane, in one of the sidebars, or in a popup window. Objects displayed in any of these places can in turn be clicked to open them.



Note

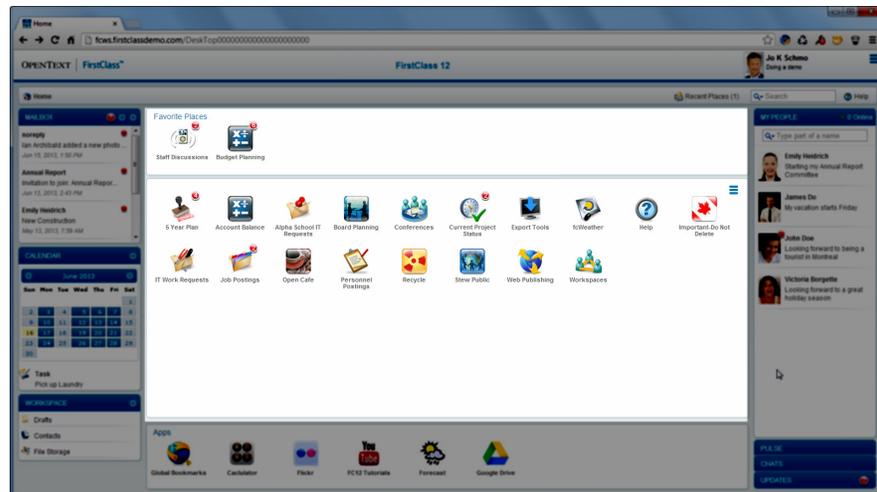
Depending on the amount of space available in your browser window, the central pane may cover the sidebars when you open an object, to optimize space for the object's contents. If you want to see the sidebars at the same time, enlarge your browser window.

Where you see an **x** button in the corner of one of these panes or windows, you can close the window by clicking that button. Objects that open in the central pane are closed using the navigation bar, as described below.

-  Your desktop includes a menu in the top right corner that allows you to update your preferences, profile, and password, or to disconnect from your server.

Your homepage

The middle section of the central pane shows all the conferences, communities, and other containers that you share with others, in alphabetical order. This is your homepage.

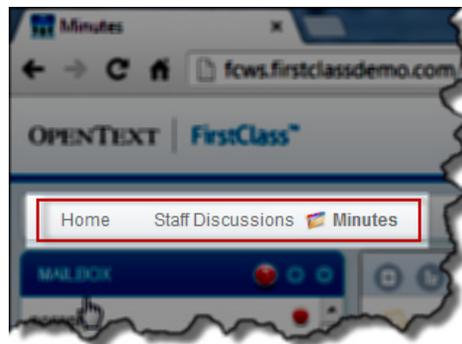


To open one of these containers in the central pane, click it.

Your homepage includes a menu in the top right corner that allows you to create containers on your homepage and view containers that you recently deleted.

The navigation bar

When you open a container in the central pane, it is also represented in the navigation bar above the central pane. If you then open a subcontainer, the full path to that subcontainer is shown on the navigation bar. This lets you return directly to a container in that path by clicking it.



To go directly back to your homepage, click Home on the navigation bar.

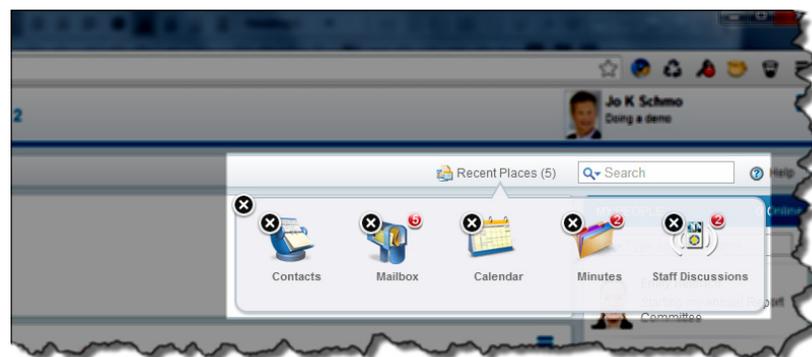
Favorite Places

If you use certain containers on your homepage frequently, you can drag them to the **Favorite Places** bar above the homepage. Once there, you can drag them into any order, and you can always drag them back to your homepage.



Recent Places

The containers you have most recently visited are remembered for you. To see these containers in a popup window, click **Recent Places** on the navigation bar.



If you want to add an open object such as a new message or calendar event to your recent places, click the minimize button at the top of the object's form.

To remove an object from the popup, click the **x** button beside it.



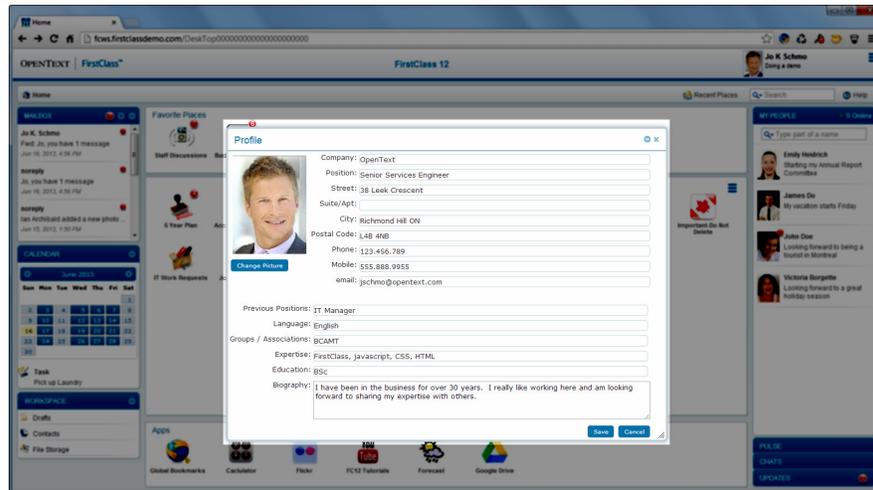
Tips

Recent Places provides a handy method for moving items. First, open and close the container to which you want to move something (the target container). Then open the container that currently stores the item you want to move. Drag the item to the target container in the Recent Places popup.

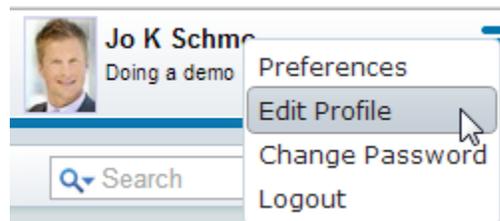
You can use the same method to attach a file that is on your computer or something that is on your server (like a FirstClass document or uploaded file) to a new object such as an unsent message. For example, to attach a FirstClass document to an unsent message, minimize the message to **Recent Places**, navigate to the location of the document, then drag the document to the message.

Your profile

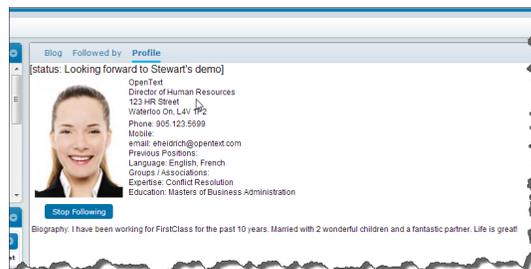
Your profile provides others with personal information about you and ways to contact you. It's important to complete your profile to make the FirstClass collaborative experience as rich as possible.



Your profile picture and name are displayed in the top right corner. To edit your profile, choose **Edit Profile** from the desktop menu.



To see someone's profile, click their picture or name wherever you find it in a list. If you see their blog first, click **Profile** at the top of their blog.



You can open your own profile the same way if you just want to read it or work on your blog.

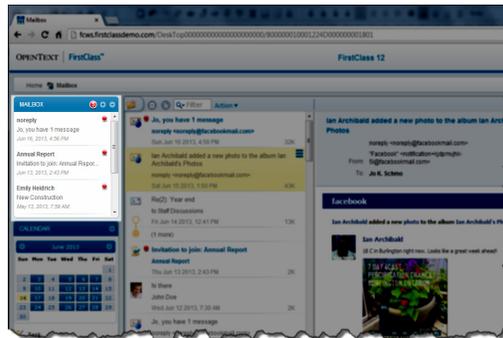
Mailbox



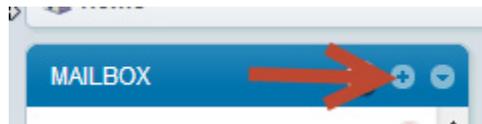
Note

Depending on how your organization handles email, you may not have a FirstClass mailbox. see “If you use another mail system” on page 104 for more information.

Your mailbox stores personal items such as your private email. The **MAILBOX** pane in the left sidebar lists all unread items in your mailbox. To open one of these items, click it. Your mailbox opens in the central pane, with this item automatically open. The item disappears from the list of unread items.



To open your entire mailbox without opening an item within it, click the **MAILBOX** title. To create a new message right from your desktop, click the **New Message** button at the top of the **MAILBOX** pane.



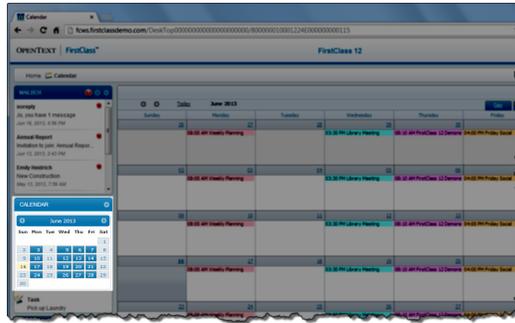
Calendar



Note

If you are not using FirstClass for email, you do not have a personal calendar and the **CALENDARS** object in this section is a container for other group calendars. see “If you use another mail system” on page 104 for more information.

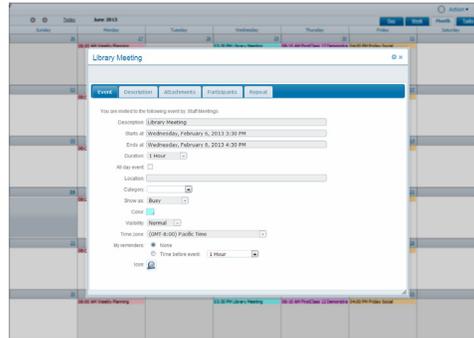
Your personal calendar stores events and tasks that you have created, plus events to which you have been invited. The **CALENDAR** pane in the left sidebar shows your personal calendar as a mini calendar in month view, followed by a list of today's events and tasks. A shaded date indicates that there are calendar items for that date.



To see the events and tasks for a different day, click that date in the mini calendar. You can display a different month in the mini calendar by clicking the back or forward arrow button beside the month.

To open the calendar in the central pane, click the **CALENDAR** title.

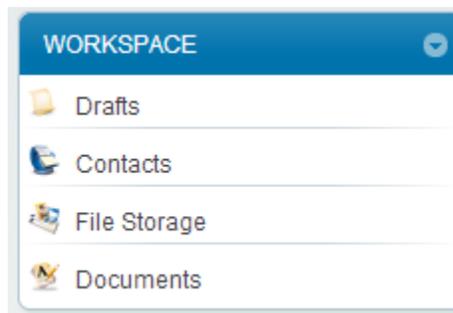
To open an item listed below the calendar, click it. The calendar opens at the same time.



Workspace

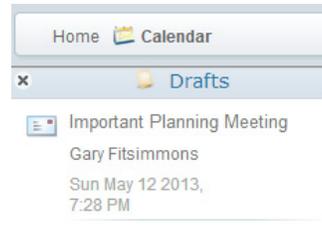
The **WORKSPACE** pane in the left sidebar lists folders meant for your personal, rather than shared, information. To open one of these folders, click it.

The folders in this pane are:



Drafts

Lists all items that you have saved as drafts because you are not yet ready to publish them. You'll also see these items in other locations. For example, an unsent message will also show in your mailbox. A document created in a conference and saved as a draft will also show (for you only) in that conference.



Messages are automatically saved as drafts if you create and close them without sending them. When you are ready to send an unsent message, open it and click the Send button.

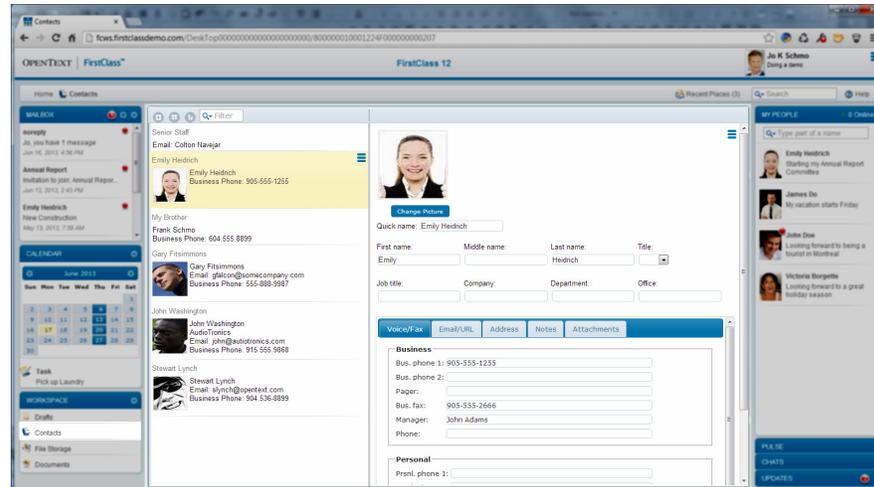
Contacts



Note

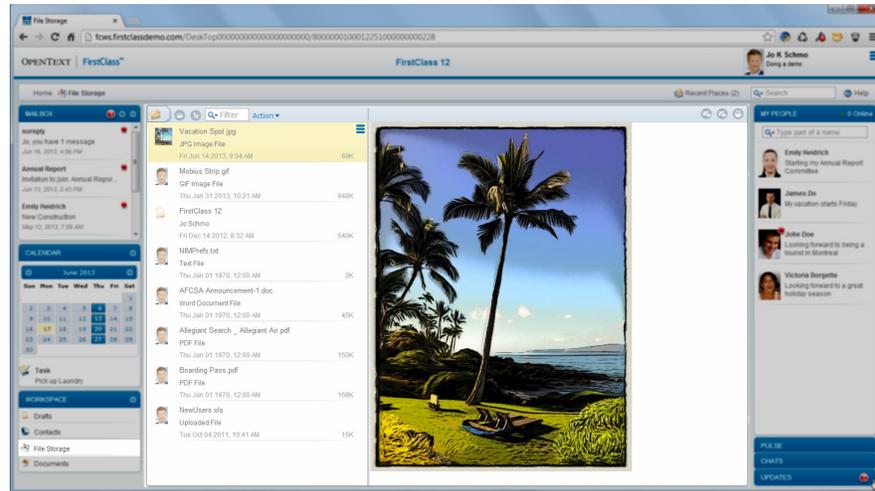
Depending on how your organization handles email, you may not have a Contacts folder. See “If you use another mail system” on page 104 for more information.

Stores personal contact information for friends and business associates.



File Storage and Documents

A place where you can store uploaded files for your personal use. Depending on the file type, you may see a thumbnail of the file contents in the list of files.



To upload a file from your computer to this folder (or to any other open container), open the folder, then just drag the file onto the open folder.

To open a file, choose **Open** from its menu. If the file format is supported by your browser, the file opens in a separate tab. Otherwise, you are asked how you want to handle the file. Some file formats open immediately in a separate tab when you select them.

To download a file from this folder (or any other container) to your computer, use your browser's normal file download method.

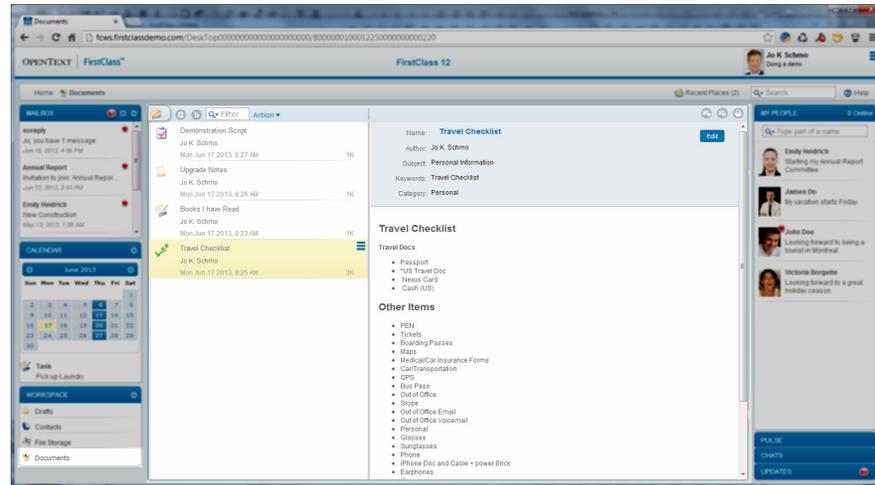


Note

Where files are attached to objects such as messages, rather than uploaded directly to a container, you can use the same download method.

Documents

A place where you can store FirstClass documents that are just intended for your personal use.



To create a document in this folder (or in any other open container), click the **New** button, then choose **New Document**.

To update an existing document, open it, then click the **Edit** button.

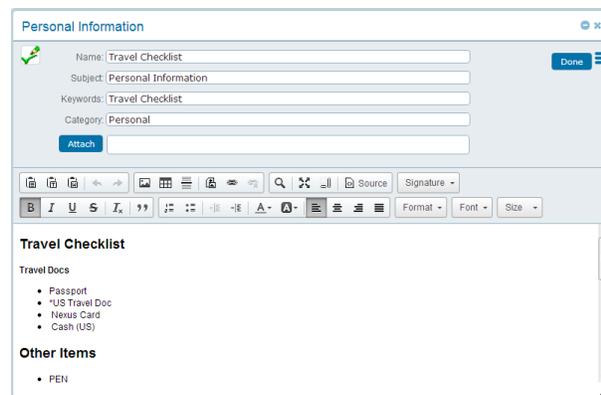


Warning

If you edit a document that was created in the classic FirstClass client, its format is changed from the native FirstClass format to HTML. This means it is no longer editable in the classic client.

The document form

The document form consists of a top pane (envelope), where you provide information such as the document name, and a bottom pane, where you enter and format your document content.



Note

Your spelling is checked as you type. To see suggestions for a word that is underlined in red, Control (Command)/right-click the word.

Field	Description
Icon Picker	The icon that will be associated with this document. To change the icon, click the existing icon, then click the icon you want from the selection list. To see additional icons, choose All Icons from the popup's menu.
Name	The name you want to give your document.
Subject	The subject you want to give your document.
Keywords	Keywords that describe your document. Separate each keyword with a space.
Category	Any category that is useful to you.
Attach	Attaches a file that is on your computer to the document. Browse for and select the file after you click this button. As a shortcut, or to attach an object that is on your server (such as a message or an uploaded file), drag the file or other object to the document's envelope.
Done	Asks you what you want to do with the document. Publish saves the document and displays it for everyone to see in the container. Save as Draft saves the document as a draft, making it visible only to you. Don't Save undoes any editing you did while the document form was open. Cancel returns you to the document form.
menu in the top right corner	Print opens your computer's standard print form to print this document. Delete deletes the document.

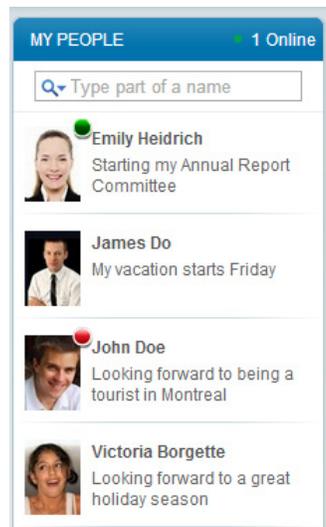
Apps

The Apps bar under your homepage lists any web applications that have been provided by your administrator. To run one of these applications in a popup window, click it.

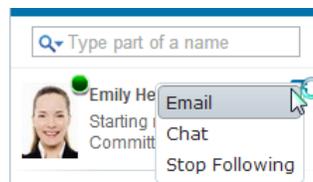


My People

The **MY PEOPLE** pane in the right sidebar lists everyone you have decided to follow because their activity particularly interests you, and so acts as your personal buddy list. You can tell at a glance when anyone listed here is online, or there is new activity in their blog.



When you hover over an entry in this list, a menu becomes available. You can use this menu to send email to someone or chat with them.



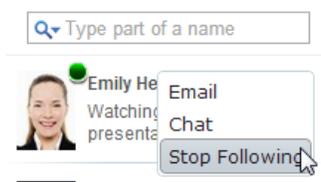
Adding to your My People List

To add someone to your people list, open their profile and click the **Follow** button.



Removing people from your My People List

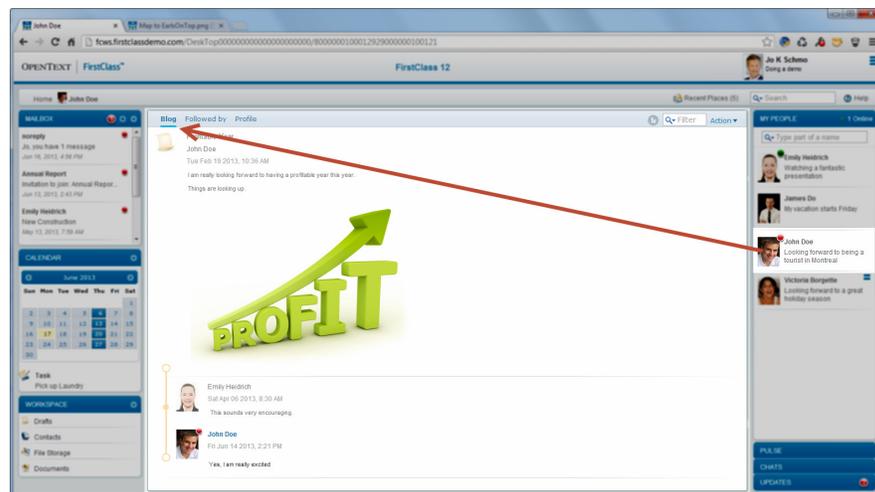
To remove someone from your people list, choose **Stop Following** from their menu.



You can also open their profile and click the **Stop Following** button.

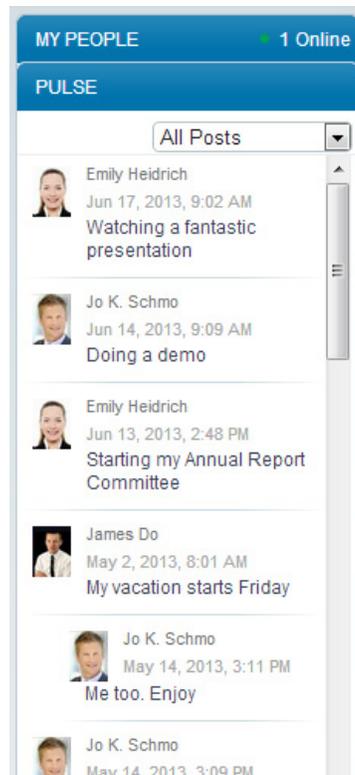
Viewing a person's Blog

To go to someone's blog and profile, click their picture.



Pulse

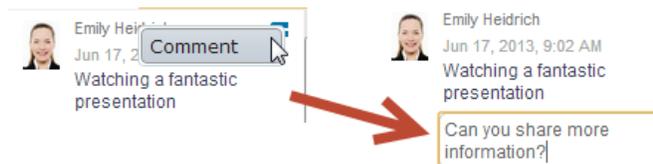
The **PULSE** pane in the right sidebar lists people's status posts and replies to them.



To see everyone's Pulse posts, choose **All Posts**. To see just the posts of the people you are following, choose **Posts by My People**. To see just your own posts, choose **My Posts**.



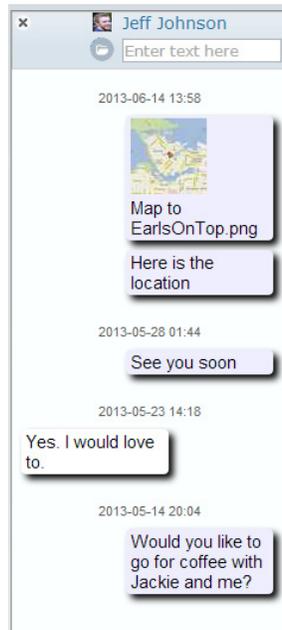
To comment on a post, hover over it to reveal its menu, choose **Comment**, then type your comment and press Enter (Return).



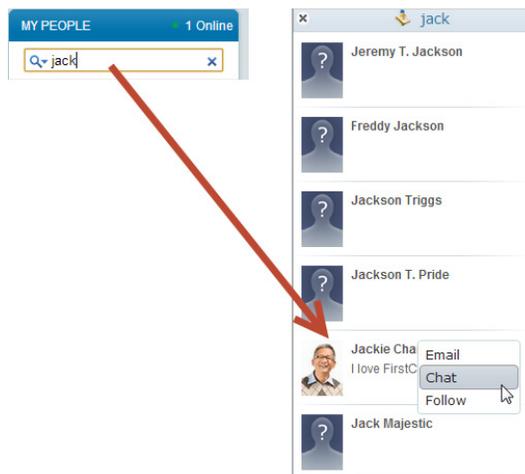
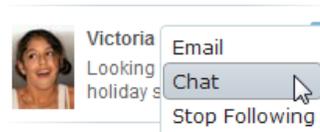
Chats

The **CHATS** pane in the right sidebar lists everyone with whom you have had an online chat.

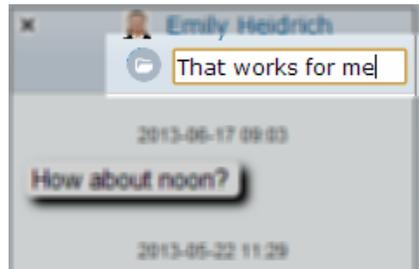
To reopen a chat, click the person. You will see the comments that were made previously when chatting with this person. If the person is currently online, you are reactivating the chat.



To initiate a chat with someone online who isn't yet in the **CHATS** pane, choose **Chat** at their entry in your people list or from a list of Directory name matches (described later in this document).



To add to an open chat, type your comment at **Enter text here**, then press Enter (Return). When the person responds, you will see their comment above yours.



To upload a file that is on your computer to an open chat, click the **Upload** button on the chat toolbar, then browse for and select the file. Your file is represented by a button in the chat. Clicking this button opens the file in a separate tab if your browser supports this file type. From here, you can use your browser's standard method to download the file. If your browser doesn't support this file type, you are asked how you want to handle the file.



For files on the server

If you want to add a file that is already on the server (an uploaded file or one attached to a FirstClass object such as a message), drag it to the chat.

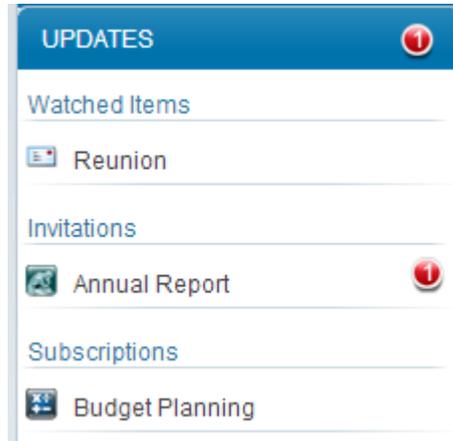
When you hover over someone in the chats list, a menu becomes available. You can use this menu to email them, or follow or stop following them.

To remove a chat from this list, choose Delete from its menu.

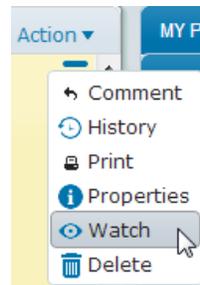


Updates

The **UPDATES** pane in the right sidebar contains three sections: **Watched Items**, **Invitations** and **Subscriptions**. Hovering over items in these sections displays their menus.

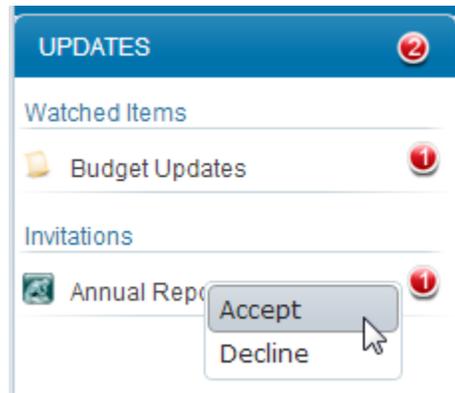


The **Watched Items** section shows items that you are watching for activity. You may want, for example, to know when a message is replied to or a document is updated. To add an item to this list, select it, then choose **Watch** from its menu.

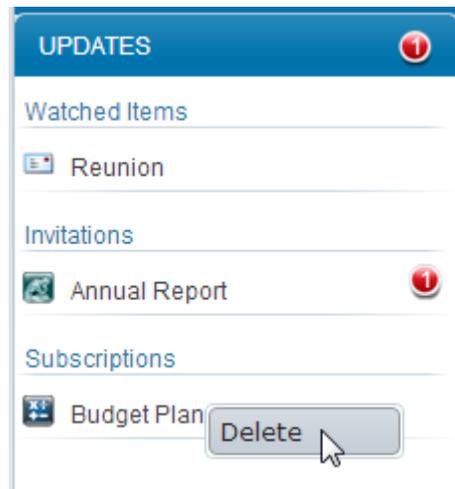


To remove an item from this list, choose **Remove Watch** from its menu.

The **Invitations** section shows any invitations you have received to join communities. To open the community, click the invitation. To join the community, choose **Accept** from the invitation's menu. To decline the invitation, choose **Decline**.



The **Subscriptions** section shows any communities that you have subscribed to email notifications of either all posts or the daily digest. To remove a subscription, choose **Delete**.

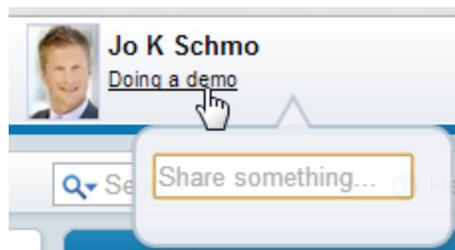


Posting your status

A status post is a short comment that you post for others to see, like a tweet.

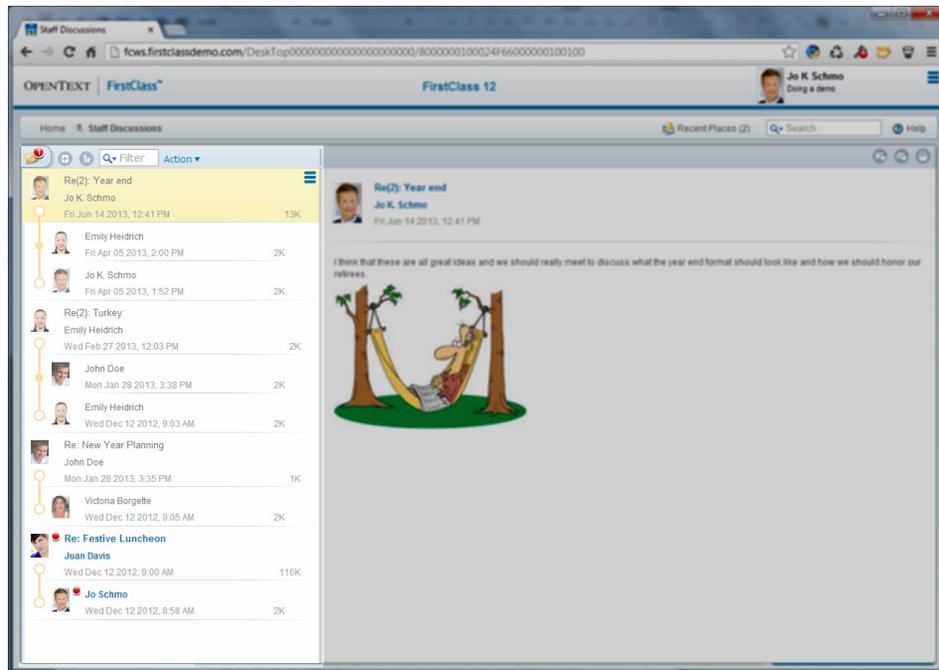
You'll see your most recent status post in the same location as your profile picture and name. Everyone's status posts are listed in the **Pulse**.

To post your first status, click the link you see in this location, then type your status and press Enter (Return). To post a new status, click your old one, then type your new one at **Share something** and press Enter (Return).



Working with lists

Although some containers may open in icon view, where you see all content represented by icons, most containers are set up to open in list view. In this view, you'll see a split pane, with content listed in the left pane and any open object displayed in the right pane.



Selecting objects in lists

When you click an object in a container's list, it is selected, and its contents are opened in the right pane. You can then use the menus and buttons displayed with both the listed and open object to work with it.



Note

If you want to select an object without opening it in the right pane, press Control (Command) while you click it. Control (Command)/clicking the object again deselects it.

To select multiple objects, Control (Command)/click each one.

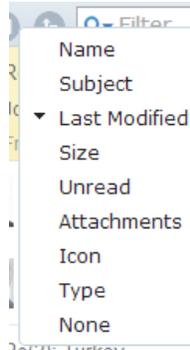
Opening objects sequentially

You can use the down and up arrow keys to open the next or previous object in a list.

Sorting lists



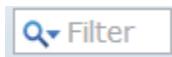
To change the order in which a list is sorted, click the Sort by button, then choose the element you want to sort on. For example, choosing **Subject** sorts the list alphabetically by subject. Choosing **Last Modified** sorts the list by date.



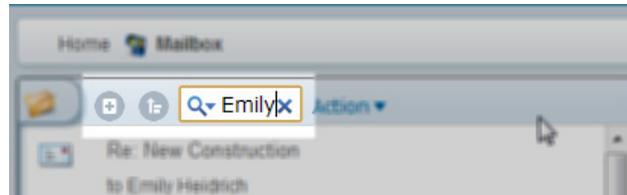
Choosing **First name** in your Contacts folder sorts your contacts alphabetically by first name.

To reverse sort order, choose the same element again.

Filtering lists



To help you find something in a list, you can show only the objects in the list that contain particular text. This text must be something that is always displayed in the list, such as subject or sender, rather than text that is only seen when you open objects, such as text in the body.



To filter the list in this way, type the text at **Filter** at the top of the list, then press Enter (Return).

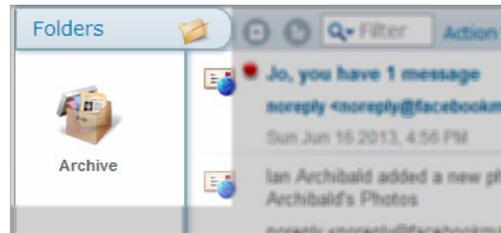
To restore all objects to the list view, clear the **Filter** field, then press Enter (Return).

Subcontainers

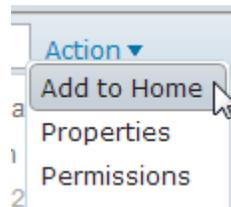


To aid in organization, you can store objects in subcontainers inside parent containers. For example, there may be a Personnel conference, and within that, a Benefits subconference.

If you see a **Folders** button in the top left corner of an open container, you can click this button to open a flyout pane displaying subcontainers. To close the flyout, click the **Folders** button again.

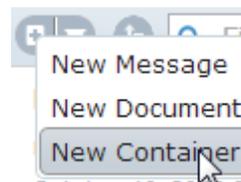
**Tip**

To add a link to a subcontainer to your homepage, open the subcontainer, then choose **Add to Home** at **Action**. Note however, that only Conferences, Communities and Calendars can be added to your homepage. Folders cannot.

**Creating folders in containers**

To store reference material, you can create folders. You can't send messages to folders, but anything stored in them has no expiry period by default, so they are a good way to archive objects.

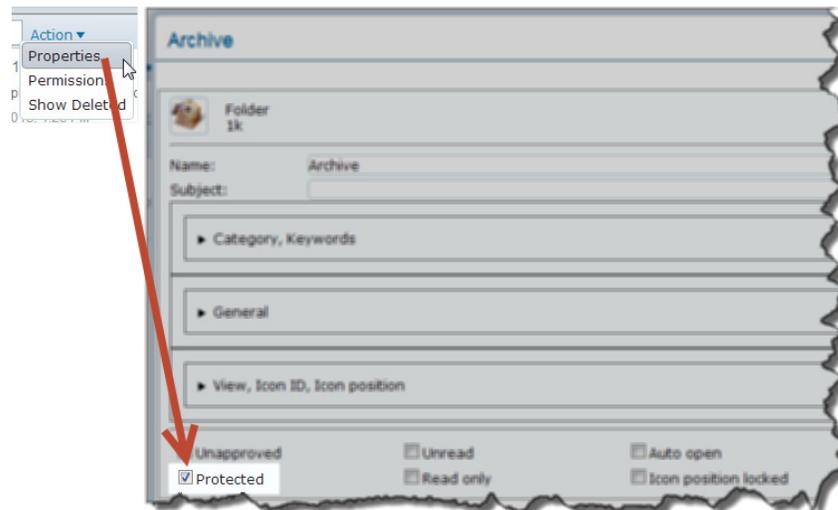
To create a folder inside a container, open the container, click the container's **New** button, choose **New Container**, then select **Folder**.



Follow the prompts to give your folder an icon and name, then click **Create**. You can access your new folder using the container's **Folders** button.



To protect your folder from being deleted by accident, open it, click the **Action** button at the top of the folder, choose **Properties**, then select **Protected**. If you really want to delete this folder in the future, you must first clear this checkbox.



Creating folders on your homepage

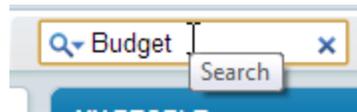
You can also create folders on your homepage for your own personal storage by choosing from the homepage's menu.

Searching FirstClass

Searching for content

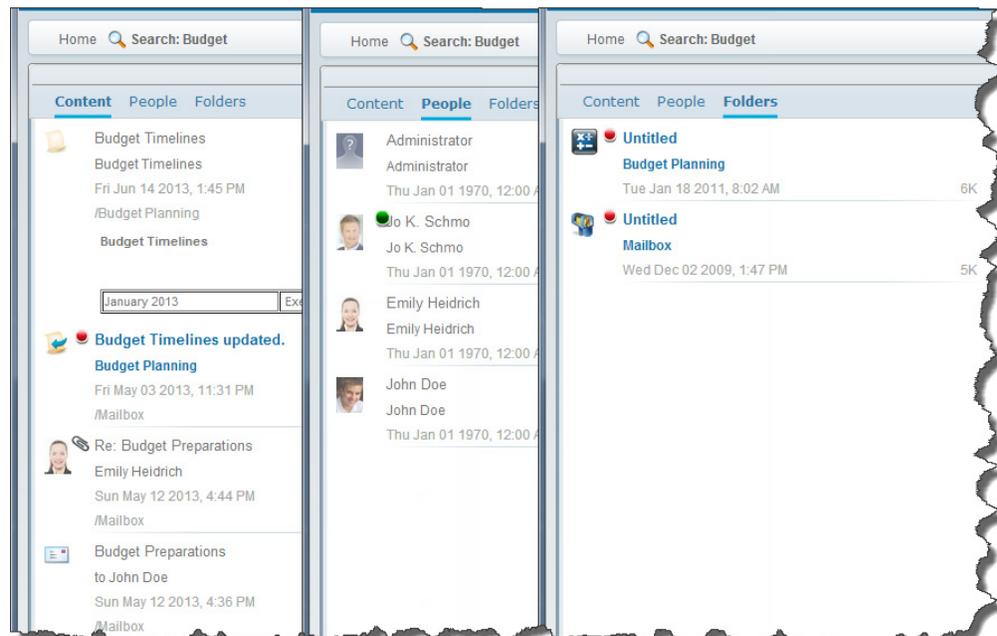
To search FirstClass for all content containing a particular word or phrase, type that word or phrase at **Search** on the navigation bar, then press Enter (Return).

If you are searching from your homepage, FirstClass searches all content accessible to you.



If you are searching when a particular container is open, FirstClass searches that container.

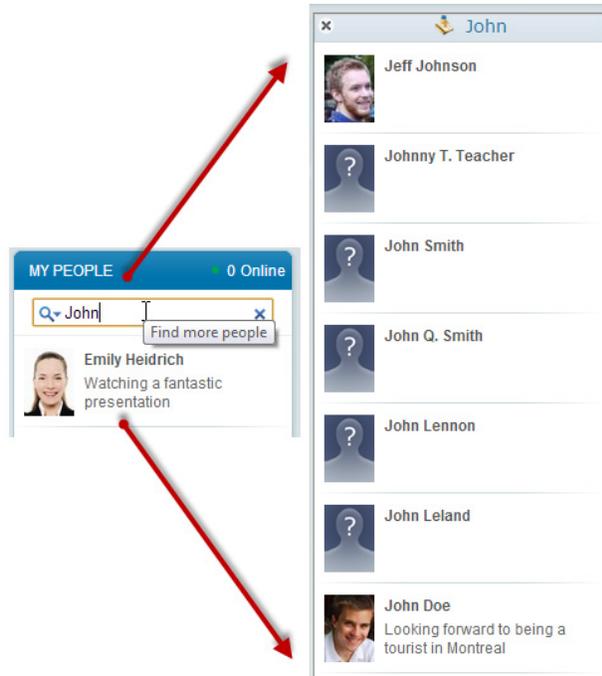
Search results are divided into **Content** (objects such as messages and documents containing your search term), **People** (people who have posted something containing your search term), and **Folders** (containers with your search term in their descriptions or storing objects that contain that term).



You can work with items in the search results window just as you can anywhere else.

Searching for people

To search the Directory for someone, type all or part of their name at **Type part of a name** in the **MY PEOPLE** pane, then press Enter (Return). Everyone in the Directory who matches your search term is listed.



Hovering over a person in this list displays a menu that lets you:

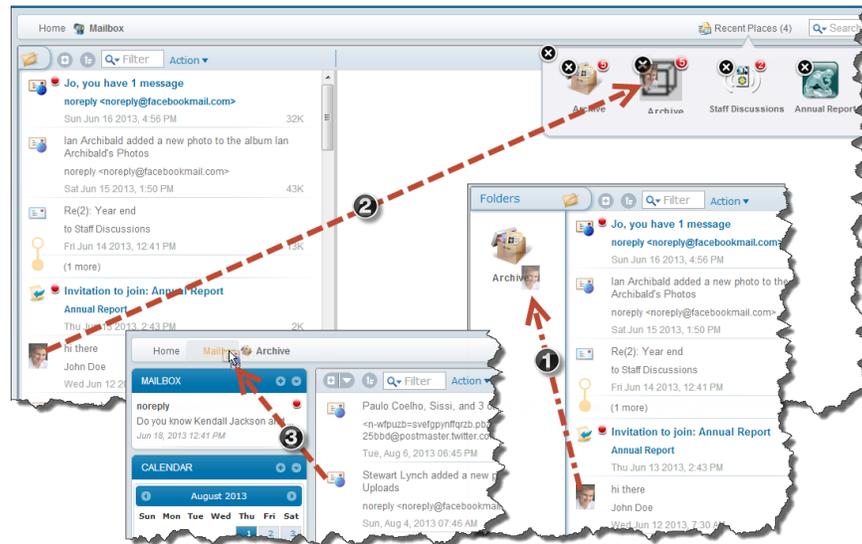


- add them to your people list - click **Follow**
- remove them from your people list - click **Stop Following**
- send a message to them - click **Email**
- chat with them - click **Chat**.

You can also see the person's profile by clicking them in this list.

Moving objects

You can drag and drop objects to move them between containers.



1. To move an object to a subcontainer, drag its icon to the parent container's **Folders** button, then drop it on the subcontainer displayed in the flyout.
2. To move an object to a container that you recently had open, drag its icon to **Recent Places** on the navigation bar, then drop it on the container displayed in the popup window.
3. To move an object to a container within the path, drag its icon to the folder name on the **Path trail** on the navigation bar, then drop it.

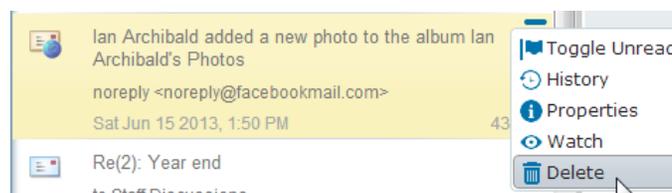
Deleting objects

To remove a container, click and hold the closed container until you see the x button, then click that button.



If this is a shared container that you didn't create, removing it from your homepage affects only your view of it. Others can still access it, and if necessary in future, you can restore it to your homepage.

To delete objects in lists, select them, then choose **Delete** from their menus.



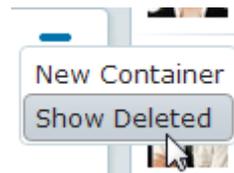
To remove items that display an x beside them, such as message recipients or attached files, click the x.



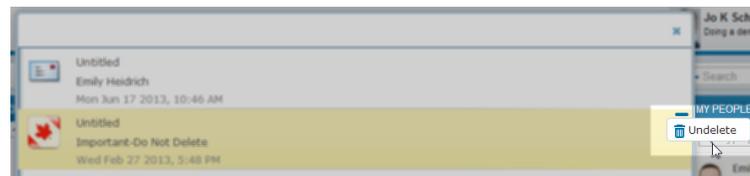
Undeleting objects

When you delete any FirstClass object, it is still available for a short while. The server removes it permanently as part of routine maintenance. Before permanent removal, you can display deleted objects, and undelete them if you wish.

To view the containers you have recently deleted from your homepage, choose **Show Deleted** from the homepage's menu. To view deleted objects in an open container, choose **Show Deleted** from the container's Action button.



To undelete an object, select it from the list of deleted objects, then choose **Undelete** from its menu. The object is restored to its original location.



Getting additional information about objects

Viewing an object's history

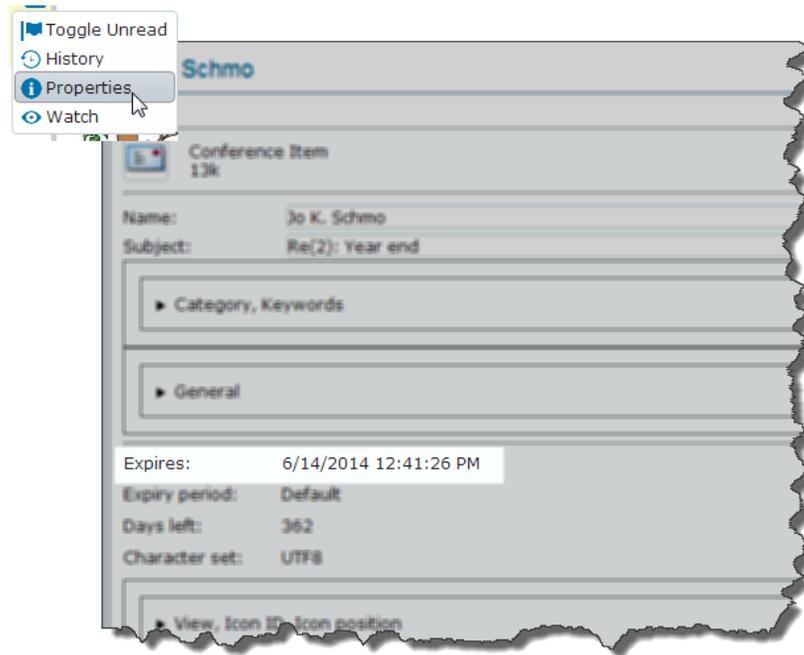
FirstClass tracks the history of activities related to objects, such as who created or read a message and the date, or the date a document was updated and by whom.

To see this history for an object, select it, then choose **History** from its menu.



Viewing an object's properties

To see information such as when an object will expire, select it, then choose **Properties** from its menu.



About those colored dots

Red dots

A red dot beside a container indicates that there are unread items in that container. The number in the dot tells you how many unread items there are inside.



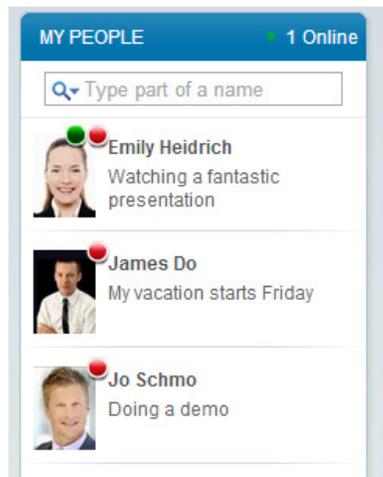
Each unread item inside the container is also marked with a red dot. Opening an item removes its red dot.



Note

In addition, unread items (as well as unsent messages in your mailbox) are shown in blue.

Red dots work the same way in the sidebar panes showing your mailbox, calendar, chats, updates, and the Pulse.



Removing Red Dots

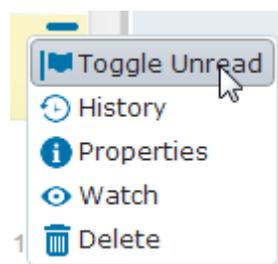
You can also remove red dots without opening objects.

Removing red dots from containers

To remove the dot from a closed container, **click and hold the dot** for a couple of seconds. If you remove the dot from a closed container, all items in that container will have their dots removed.

Toggling the Unread Status

To remove the dot from an object such as a message **without opening it**, select it, then choose **Toggle Unread** from its menu. As the name implies, you can use this to toggle the red dot on or off.



Note

This is useful if you want something you have read to draw your attention again. You can put the red dot back, so that the object appears unread.

When you remove a red dot without opening an object, you won't be shown as having read the object in its history.

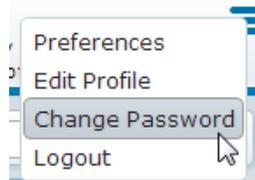
Green dots

A green dot beside someone means they are currently online.

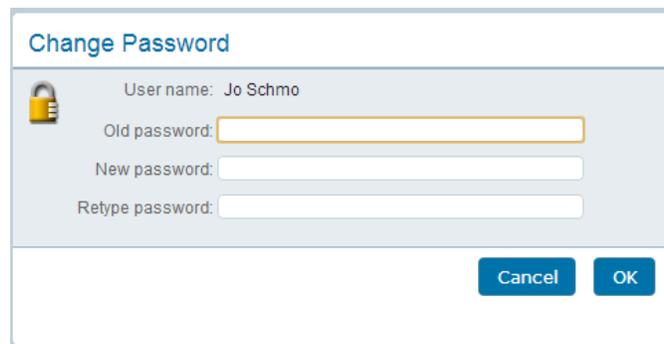
Changing your password

For security, we recommend that you immediately change the password you receive from your administrator.

To change your password, choose Change Password from the desktop menu.



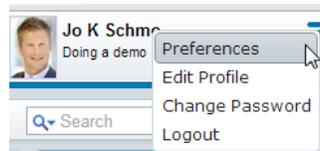
You will be asked to confirm your old password and enter your new password twice.

A screenshot of a 'Change Password' dialog box. It has a title bar with the text 'Change Password'. Below the title bar is a lock icon and the text 'User name: Jo Schmo'. There are three input fields: 'Old password:', 'New password:', and 'Retype password:'. At the bottom right, there are two buttons: 'Cancel' and 'OK'.

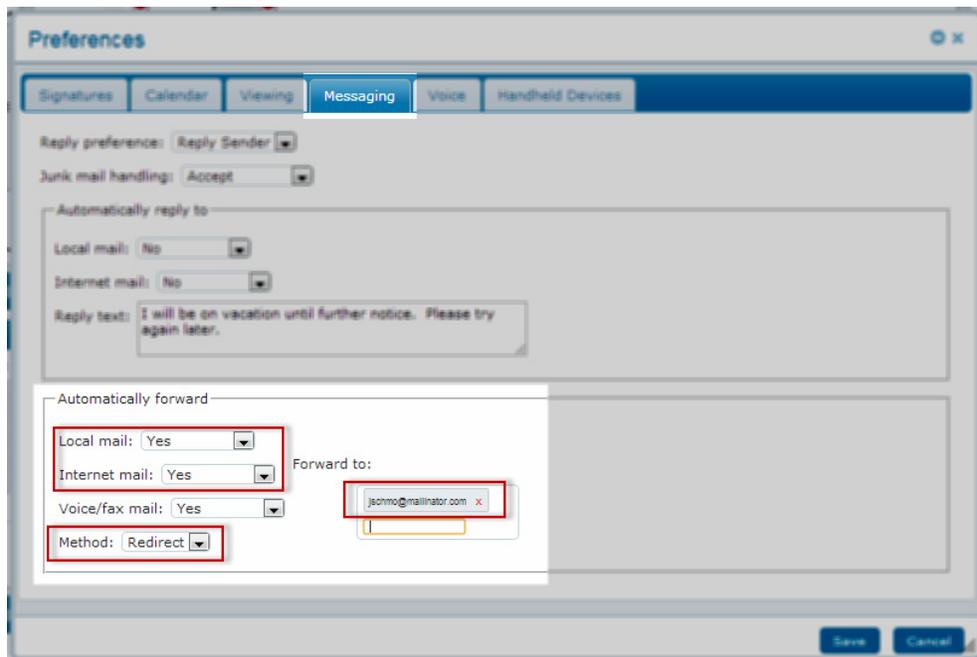
Supplying an email address when you don't have a mailbox

If your organization doesn't use FirstClass as its email application, you need to supply an email address so that FirstClass will know where to send system notifications (such as calendar reminders when you aren't logged in).

To supply this address, choose **Preferences** from the desktop menu.

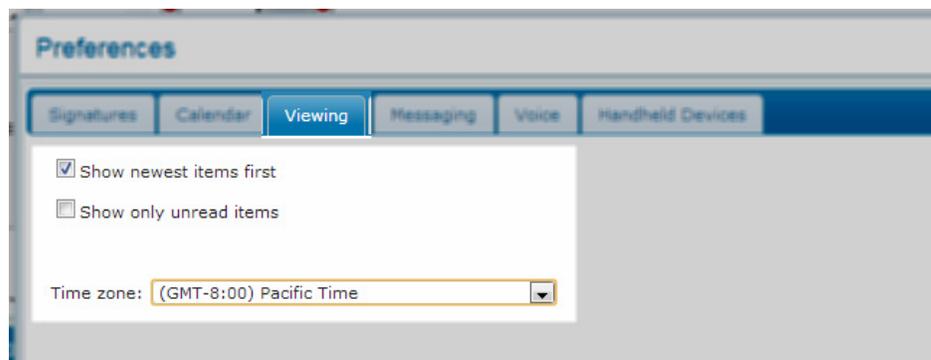


Click the **Messaging** tab, then type your email address at **Forward** to and choose **Yes** at **Local Mail**, **Yes** at **Internet mail** and **Redirect** at **Method**.



Customizing your viewing preferences

To customize how you view FirstClass information (for example, the order in which lists are sorted), choose **Preferences** from the desktop menu, then click the **Viewing** tab.



To	Do this
list items from most recent to oldest by default	Select Show newest items first .
hide objects in lists that you have already read	Select Show only unread items .
	<p>Tip</p> <p>If you are finding that mail is disappearing, check whether you have this selected, because read objects will seem to have disappeared.</p>

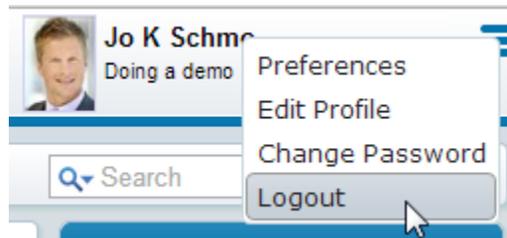
change the time zone in which you want FirstClass to display dates and times	Choose the appropriate time zone at Time zone. The value Default is the time zone in which your server is located. Caution Choose your time zone carefully. You may see several time zones that look like they are the same number of hours off Greenwich Mean Time, but things like daylight savings time rules can differ from place to place.
--	---

Click **Save** on this form when you are finished.

The other options on the preferences form are described elsewhere in this help.

Logging out

If you are using a shared computer, we recommend for security that you disconnect from the FirstClass server when you are done.



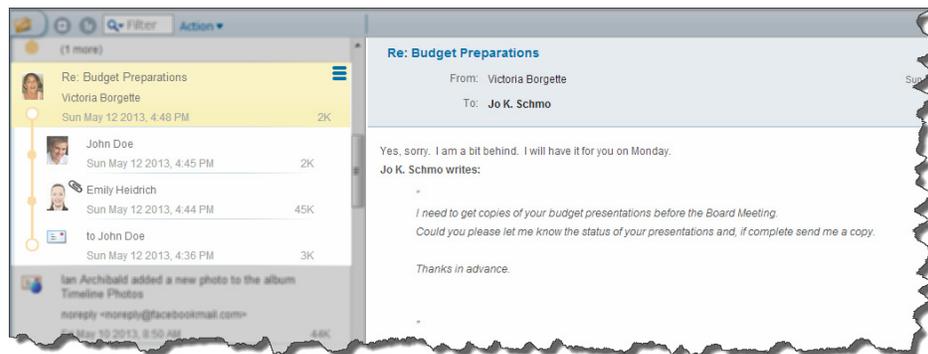
To disconnect from the FirstClass server, choose **Logout** from the desktop menu.

Email

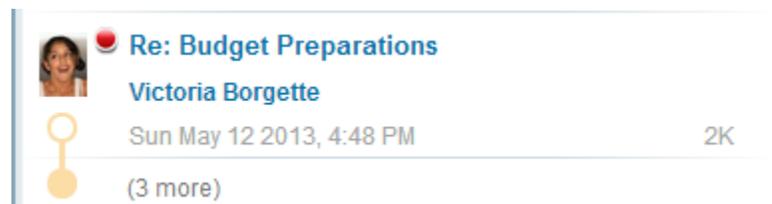
If your organization is using FirstClass as its mail system, you'll have a FirstClass mailbox containing all the private messages you have sent and received. In all cases, you'll see messages in FirstClass conferences.

Message threads

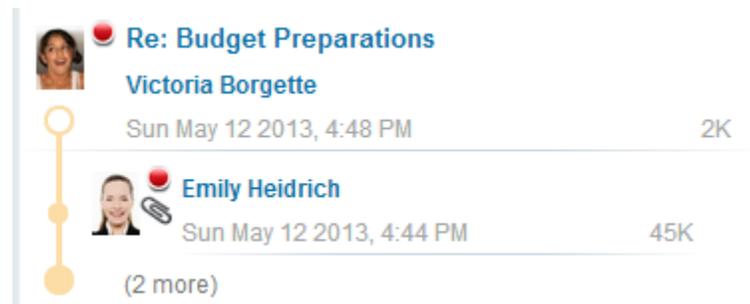
Messages with replies are grouped into threads. A message thread consists of a message plus all the replies that have been made to it. The oldest (original) message is at the bottom of the thread, and the most recent reply is at the top.



If you have read all the messages in a thread, all but the most recent message is collapsed to a single line that indicates how many more messages are in the thread.



If a thread consists of a mixture of read and unread messages, only the read messages are collapsed.



To expand a thread so that all messages are listed, click the bottom bead on the thread control to the left of the thread. Clicking this bead again restores the initial view.

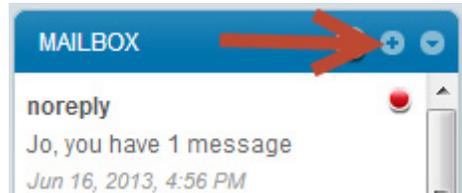
To collapse a thread so that only the most recent message is visible, click the top bead. Clicking this bead again restores the initial view.

Sending messages

To send a message, choose New Message from your mailbox's or a container's **New** button.



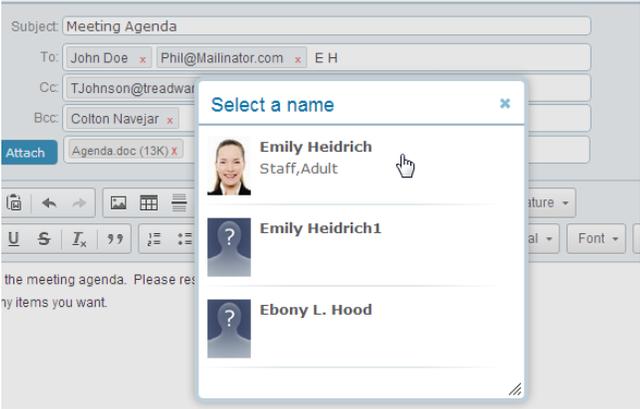
Alternatively, you can click the **New Message** button at the top of the **MAILBOX** pane.



The message form

The message form consists of a top pane (envelope), where you provide information such as the message subject and recipients, and a bottom pane, where you enter and format your message content.

Field	Description
Icon Picker	The icon that will be associated with this message. To change the icon, click the existing icon, then click the icon you want from the popup list. To see additional icons, choose All Icons from the popup's menu.
Subject	The subject of the message.

To	<p>The recipients' names.</p> <p>Type the name as it appears in the Directory (or type an Internet email address) and press Tab. For recipients who are in the Directory, you can also type a partial name and press Tab, then choose the person you want from the list of matches.</p>  <p>If you type an email address that is in the Directory, the name will resolve to the recipient's Directory name. You can add multiple recipients.</p> <p>You can enter conference names just as you would enter a person's name. If you created this message in a conference, the message is automatically addressed to the default conference recipients (typically just the conference itself).</p> <p>To remove a recipient, click the x beside them.</p>
Cc	<p>Recipients who will be copied on the message.</p> <p>Enter their names just as you would enter To names.</p>
Bcc	<p>Recipients who will be blind copied on the message.</p> <p>These recipients won't see the names of any other recipients, and their names will likewise be hidden from the other recipients.</p> <p>Enter their names just as you would enter To names.</p>
Attach	<p>Attaches a file that is on your computer to the message. Browse for and select the file after you click this button.</p> <p>As a shortcut, or to attach an object that is on your server (such as a FirstClass document or an uploaded file), drag the file or other object to the message's envelope.</p>
Send	<p>Sends the message and closes it.</p>
menu in the top right corner	<p>Delete deletes the message, if you decide you don't want to send the message after all.</p> <p>If you want to keep the message, but not send it yet, close the message form. It will be saved as a draft.</p> <p>Print opens your computer's standard print form to print this message.</p>

Correcting your spelling as you go

Your spelling is checked as you type. To see suggestions for a word that is underlined in red, Control (Command)/right-click the word.

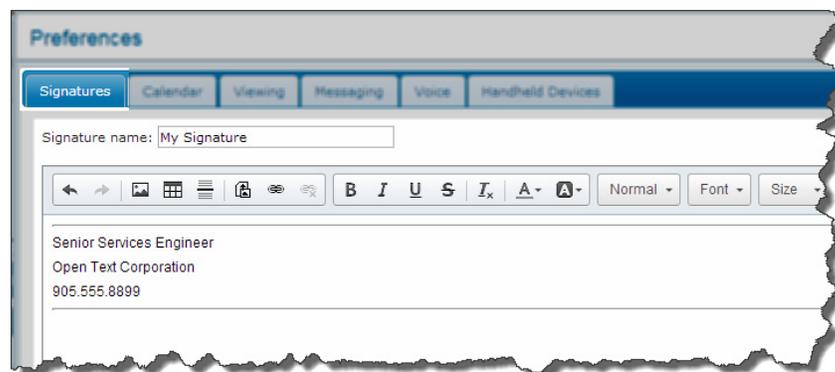
Inserting a signature

When you create a message, you can add a pre-existing signature to the bottom of the message body. Signatures can be used to repeat your name, indicate your title or email address, provide required legal statements, and so on.

You can add a signature only to selected messages or make FirstClass add it automatically to every message you create. In addition, you can create multiple signatures and choose the appropriate one for each purpose.

Creating signatures

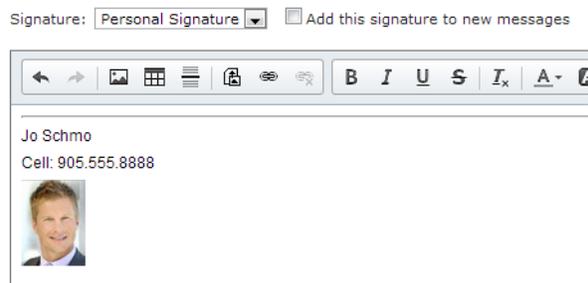
To create a signature, use the **Signatures** tab on the **Preferences** form. Type an identifying name for your signature at **Signature name**, then type and format your signature.



If you want this signature to be added to every new message, make sure **Add this signature to new messages** is selected.

Add this signature to new messages

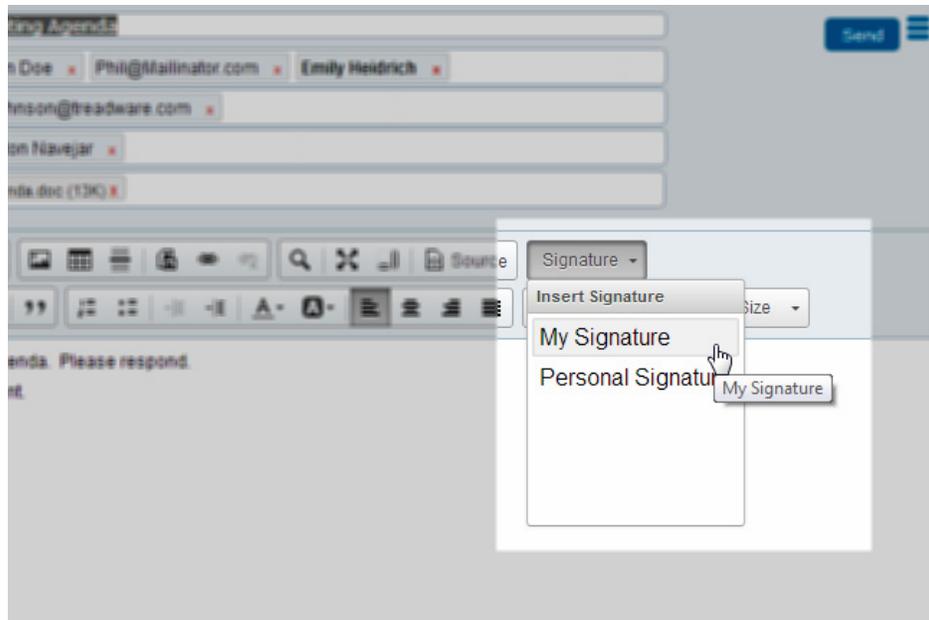
If you want multiple signatures, click the **Add Signature** button, name your new signature, then type, format, and save it.



You can display and update a signature by choosing it at **Signature**.

Inserting signatures in selected messages

If you have not chosen **Add this signature to new messages**, you can always add a signature to a specific new message, click the **Signature** edit button and choose the signature you want to use.



What happens when you send a message

When you send a message, only one copy of the message is actually created. It is stored on the server, and you and your recipients have links to it.

You can change the properties of your own link (for example, by changing the subject), and even delete it, without your actions affecting the others' links. The actual message stays on the server as long as there are any links to it, and it has not yet expired.



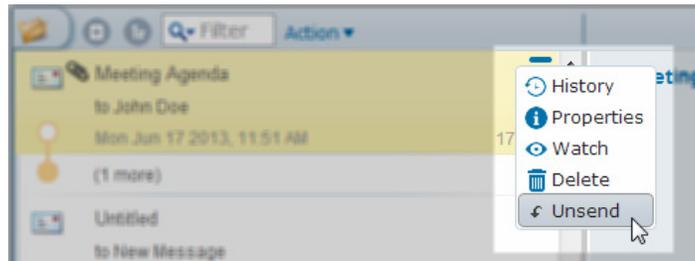
Note"

Deleting a message from your mailbox will NOT delete it from the recipients's mailbox or from a conference/

Unsending messages



In certain circumstances, you can unsend a message. This makes the message disappear from all recipient mailboxes and conferences. It remains in your mailbox as an unsend message, where you can either delete it or update and resend it. Do be aware that the message may already have been read by recipients before you unsend it.

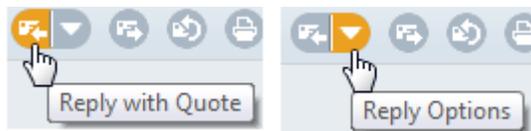


Note

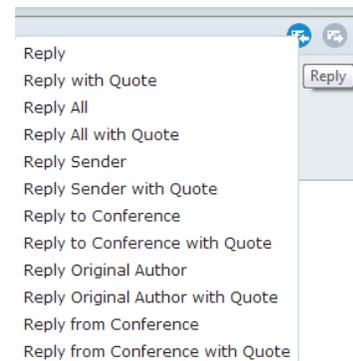
You can't unsend a message that was sent through the Internet or a gateway, or moved or deleted by the recipient.

To unsend a message, select it and choose **Unsend** from its menu, or open it and click the **Unsend** button.

Replying to messages



To reply to a message, open it, then choose the reply you want from the **Reply** menu:



- **Reply All** replies to everyone in the original message's envelope
- **Reply with Quote** includes the original message as a quote in your reply
- **Reply Sender** replies to just the original message's sender
- **Reply to Conference** replies to just the conference in which the original message is located
- **Reply Original Author** replies to just the original author of a forwarded message
- **Reply from Conference** makes the reply seem to be from the conference in which the original message is located, instead of from you

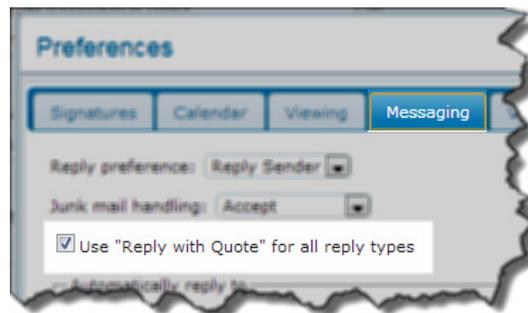
This reply option is often not allowed. It's only available in conferences where you have permission to use it.

A reply message opens with the same subject and preaddressed. You can update any of the information in the reply's envelope.

Type your response in the body area below the envelope, then send the message.

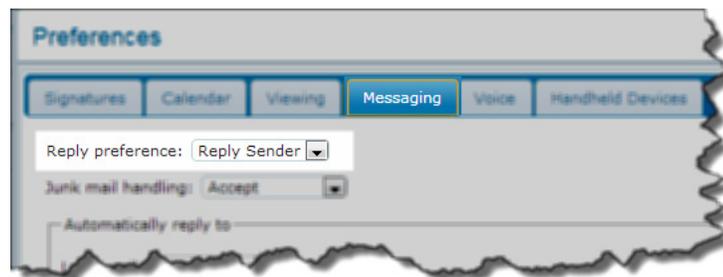
Changing your default reply option

When you click on the default reply button, the default will either be **Reply** (no quote) or **Reply with Quote**. You can change this default in your preferences.



Changing your default reply recipients

When you reply to a message, FirstClass preaddresses the reply with your default reply recipients. You can change this default in your preferences.



Exception

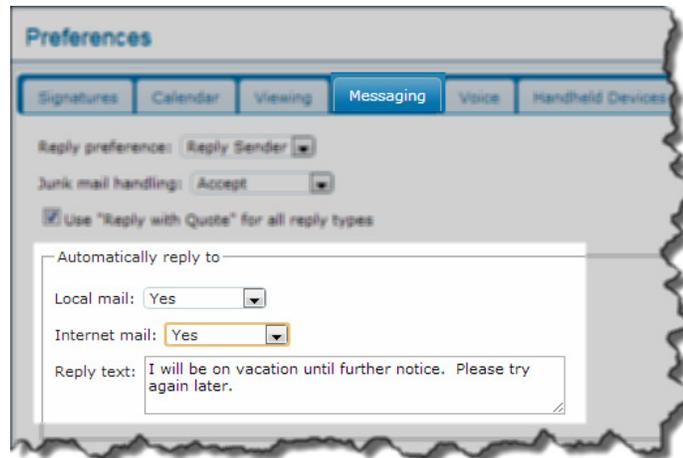
Replies to messages in conferences are automatically addressed to the conference's default reply recipients.

To change your default reply recipients, click the **Messaging** tab on the **Preferences** form, then update the **Reply preference** field.

This option	Does this
Automatic	Either addresses a reply directly to the sender and puts all other recipients of the original message in the Cc field, or uses the reply preference set for the user group to which you belong.
Reply All	Addresses a reply directly to the sender and all other recipients of the original message.
Reply Sender	Addresses a reply directly to the sender only.

Replying automatically

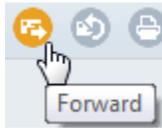
If your organization uses FirstClass as its email application, you can make FirstClass reply automatically to messages that are sent to you. This is useful, for example, if you want to inform message senders that you are on vacation.



To turn on automatic reply, click the **Messaging** tab on the **Preferences** form, then update the fields under **Automatically reply to**.

This field	Does this
Local mail	Choose No if you don't want automatic replies generated for mail sent from others on your server. Yes generates replies for all local mail. Urgent Only just generates replies for mail that senders marked as urgent.
Internet mail	Choose No if you don't want automatic replies generated for mail sent over the Internet. Yes generates replies for all Internet mail. Urgent Only just generates replies for mail that senders marked as urgent. Be careful about replying automatically to Internet mail. Spam mailers are often looking for replies to verify that an address is genuine.
Reply text	The text that you want in your automatic replies.

Forwarding messages



To forward a message to someone else, open it, then click the **Forward** button. A forwarded message opens, containing the original message in the body. Update the envelope as desired. You can also add your own text in the body.

Fwd: Re(3): Year end

Subject:

To:

Cc:

Bcc:

From: John Doe
Subject: Re(3): Year end
Date: Mon Jun 17 2013, 10:51 AM

I agree as well

Jo K. Schmo writes:

I think that these are all great ideas and we should really meet to discuss what the year end format should look like and how we should honor our retirees.

Forwarding messages automatically

If your organization uses FirstClass as its email application, you can make FirstClass forward your messages automatically. This is useful, for example, when you aren't available and want your mail answered by someone else.

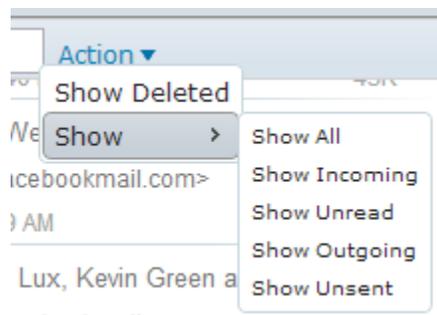
To turn on automatic forwarding, click the **Messaging** tab on the **Preferences** form, then update the fields under **Automatically forward**.

This field	Does this
Local mail	Choose No if you don't want mail sent from others on your server to be forwarded. Yes forwards all local mail. Urgent Only just forwards mail that senders marked as urgent.
Internet mail	Choose No if you don't mail sent over the Internet to be forwarded. Yes forwards all Internet mail. Urgent Only just forwards mail that senders marked as urgent. If you receive messages from an automated listserver, be careful about forwarding Internet mail. Every message you receive from the listserver will be forwarded.

Voice/fax mail	Choose No if you don't want voicemail and faxes to be forwarded. Yes forwards all voicemail and faxes. Urgent Only just forwards voicemail and faxes that senders marked as urgent.
Forward to	The email address to which you want to send forwarded or redirected mail.
Method	Redirect shows the original message sender as the sender of the forwarded message. The original list of recipients is retained for information purposes only. Forwarding doesn't send these recipients duplicate copies. Forward shows you as the sender of the forwarded message. The new recipient replaces the original list of recipients. This is the same behavior you see when you manually forward a message.

Changing your mailbox view

Using the **Show** option in your mailbox's Action menu, you can list just these objects:

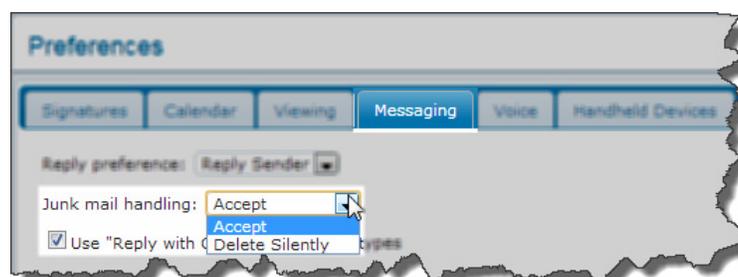


- only mail sent to you (**Show Incoming**)
- only unread mail (**Show Unread**)
- only mail you sent (**Show Outgoing**)
- only mail you have drafted but not yet sent (**Show Unsent**)

To show all items again, choose **Show All**.

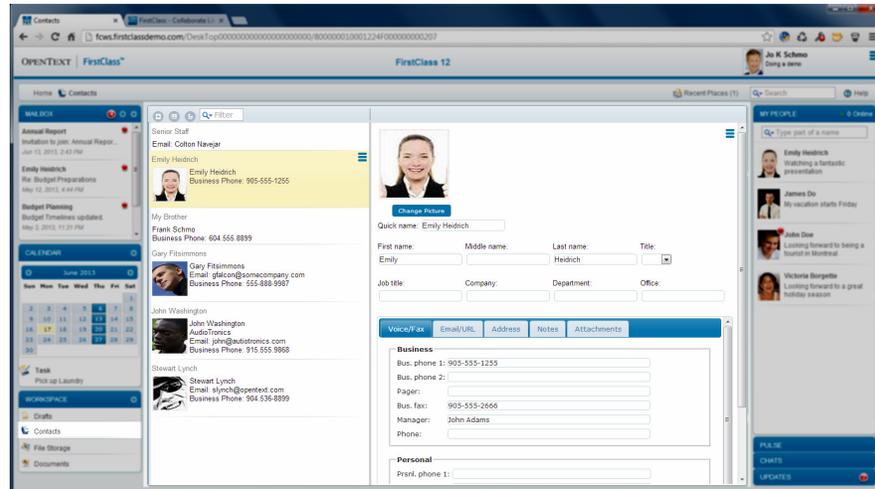
Dealing with spam

You can tell FirstClass whether to accept or delete mail that FirstClass considers spam. To do this, choose the option you want at **Junk mail handling** on the **Preferences** form's **Messaging** tab.



Your contacts

If your organization uses FirstClass as its email application, you'll see a **Contacts** folder in the **WORKSPACE** pane.



FirstClass lets you store personal contact information, such as the email address, phone number, and street address of a friend or business associate, in your Contacts folder. Contacts provide a quick way to address messages to people who aren't registered on your server (and therefore aren't in the Directory). You can even create contacts for people who are already in the Directory, if you usually think of them by nickname.

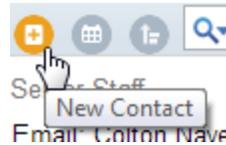
In addition, you can create mail lists to simplify sending messages to multiple people at the same time.

As long as your administrator gave you access to the contact management feature, contacts you create will be visible in your personal view of the Directory. This allows you to address mail to them by name, just as you would address others on your server. Even if you don't have this feature, you can create contacts purely for reference.

To open your Contacts folder, click it in the **WORKSPACE** pane.

Adding a contact

To add a contact, click the **New Contact** button at the top of the open Contacts folder, then complete and save the contact form.



The contact form

Quick name:

First name: Middle name: Last name: Title:

Job title: Company: Department: Office:

Field	Description
contact image	A picture of the contact. To upload a picture of the contact, click the Change Picture button, then browse for and select a file on your computer.
personal ID	The contact's name and title. At Quick name , type the contact's name as you want it to appear in the Directory. This is how you will type their name when addressing mail to them. Then type their first, middle, and last names, and choose the appropriate title.
work ID	The contact's job title, company name, department, and office location.

The Voice/Fax tab

The screenshot shows the 'Voice/Fax' tab selected. The form is divided into two sections: 'Business' and 'Personal'. The 'Business' section contains fields for 'Bus. phone 1' (905-555-1255), 'Bus. phone 2', 'Pager', 'Bus. fax' (905-555-2666), 'Manager' (John Adams), and 'Phone'. The 'Personal' section contains fields for 'Prsnl. phone 1' (867-236-8899), 'Prsnl. phone 2', 'Mobile phone' (719-563-8866), 'Prsnl. fax', and 'Assistant'.

Field	Description
Business	Business contact numbers, plus the name and phone number of the contact's manager.
Personal	Personal contact numbers, plus the name and phone number of the contact's personal assistant

The Email/URL tab

The screenshot shows the 'Email/URL' tab selected. The form contains four fields: 'Business email' (emily@opentext.com), 'Company website' (www.opentext.com), 'Personal email' (eheidrich53@gmail.com), and 'Personal website'.

Field	Description
Business email	The contact's business email address. If the address is not yet in the Directory, type it, then press Tab. If the address is in the Directory, enter it the same way you would address a message.
Company website	The website of the contact's company.
Personal email	The contact's personal email address.
Personal website	The contact's personal website.

The Address tab

Voice/Fax | Email/URL | **Address** | Notes | Attachments

Business

Bus. address:

City:

State/Province:

Zip/Postal code:

Country:

Personal

Prsnl. address:

City:

State/Province:

Zip/Postal code:

Country:

Field	Description
Business	The contact's business street address.
Personal	The contact's personal street address.

The Notes tab

Voice/Fax | Email/URL | Address | **Notes** | Attachments

Category:

Birthday:

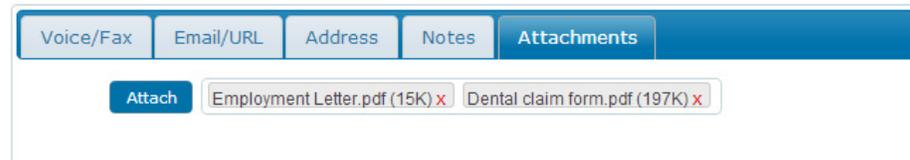
Signature

Normal Font Size

Key Contact for all things to do with Human Resources

Field	Description
Category	The type of contact.
Birthday	The contact's birthday. Simply type this information.
notes field	Type any additional information you want in the bottom field

The Attachments tab



To attach a file that is on your computer to this contact, click the Attach button, then browse for and select the file.

Creating a mail list

A mail list consists of multiple email addresses. Sending a message to a mail list results in the message being sent to everyone in the mail list.

To create a mail list, click the **New Mail List** button at the top of the open Contacts folder, then complete and save the mail list form.



The mail list form

Senior Staff

Name:

Members:

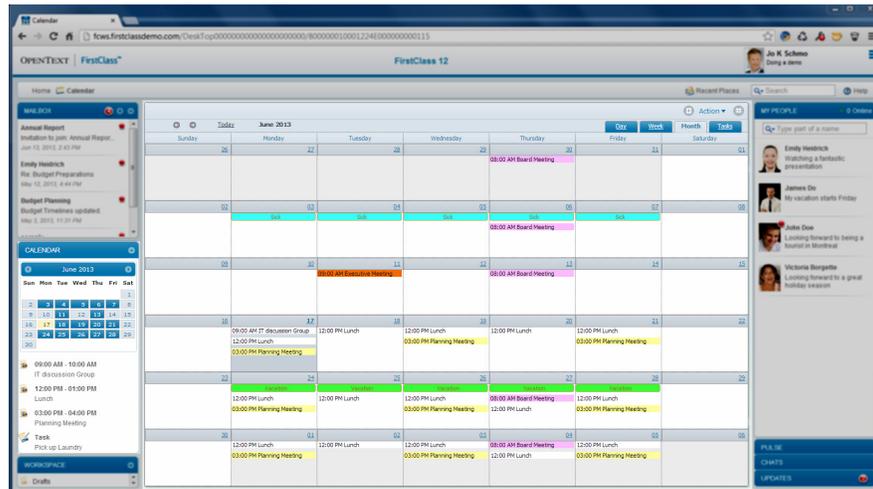
-
-
-
-

Field	Description
Name	The name of the mail list as you want it to appear in the Directory. This is how you will type its name when addressing mail to it.
Members	Enter everyone you want in this mail list just as you would address a message to each one. When you save the list, it sorts alphabetically by first name.

Calendars

About calendars

Your personal FirstClass calendar is like a personal organizer. It records calendar events and tasks.



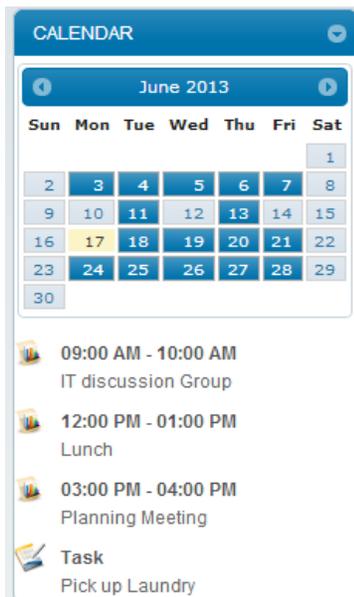
Unlike a personal organizer, you can permit other people to view and update your FirstClass calendar. This allows others to schedule meetings at mutually convenient times.

You can also have access to or create one of the following types of public calendars:

- group calendar
Allows specific groups of people to coordinate their time and tasks.
- resource calendar
Represents a resource, such as a projector, and is used as a booking device for the resource.
- location calendar
Represents a location, such as a meeting room, and is used as a booking device for the location.

Both resource and location calendars are automatically updated when people book resources and locations as part of creating calendar events.

The mini calendar



Your FirstClass desktop includes a **CALENDAR** pane showing your personal calendar as a mini calendar in month view, followed by the selected day's events and tasks. A shaded date in the mini calendar indicates that there are calendar items for that date.

To select a date and see what items are associated with it, click it.

To display a different month, click the back or forward arrow button beside the month name.

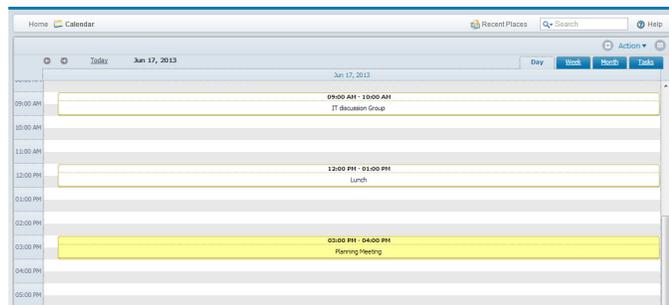
To open your calendar in the central pane, click the **CALENDAR** title. To open one of the items listed below the mini calendar, click it. Your calendar also opens to the corresponding date.

Calendar views

You can see the following views in an open calendar:

Day

Shows today's events in time slots. All-day events are at the top of the calendar. If you select an event, a popup toolbar allows you to open the event (Details) or delete it. You can also double-click an event to open it



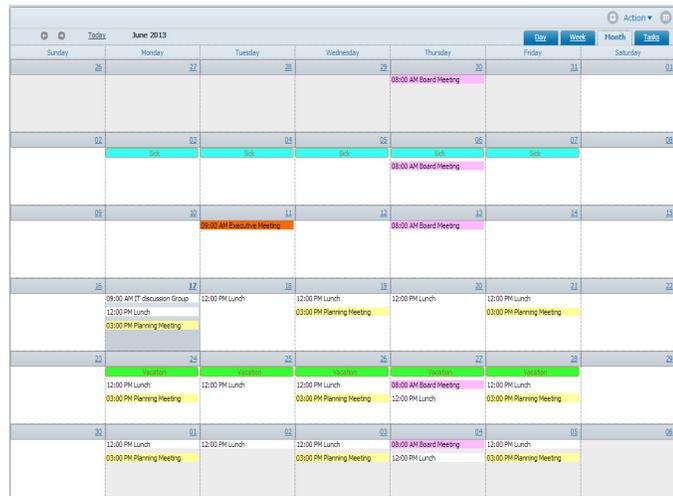
Week

Shows all events for the week in time slots. All-day events are at the top of the day column. Selecting an event displays the same popup toolbar you see in day view.

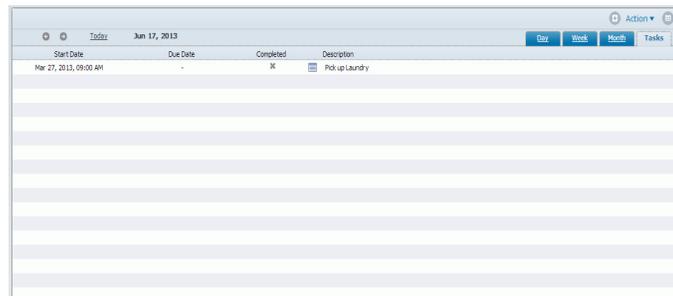


Month

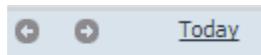
Shows all events for the month. Double-clicking is the only way to open an event in this view, and you can delete an event while it is open.

**Tasks**

Lists all tasks that are still ongoing for the selected day, or completed on that day. To open a task, click its icon. As well as updating it, you can delete a task while it is open.

**Going to a different date in an open calendar**

The arrow buttons at the top of the open calendar let you scroll dates. In day and task view, these buttons move forward or back one day at a time. In week view, they move one week at a time, and in month view, they move one month at a time.



To return to today's date, click **Today**.

Events

Receiving event invitations

Depending on your calendar permissions, invitations may appear in your calendar, or, if the sender isn't allowed to add anything directly to your calendar, in your mailbox.

The screenshot shows a web client interface for a meeting invitation. The title bar reads "Meeting regarding Budget". Below the title bar are tabs for "Event", "Description", "Attachments", "Participants", and "Repeat". The main content area displays the following information:

- You are invited to the following event by: Emily Heidrich
- Description: Meeting regarding Budget
- Starts at: Tuesday, June 18, 2013 1:30 PM
- Ends at: Tuesday, June 18, 2013 2:30 PM
- Duration: 1 Hour
- All day event:
- Location: (empty text field)
- Category: (dropdown menu)
- Show as: Busy
- Color: (color picker)
- Visibility: Normal
- Time zone: (GMT-8:00) Pacific Time
- My reminders: None, Time before event: 1 Hour
- Icon: (calendar icon)
- My status: No Action Taken

At the bottom right, there are three buttons: "Accept", "Tentative", and "Decline".

When you open the invitation, you'll see the event form plus buttons that allow you to respond to the invitation:

This button	Does this
Accept	Accepts the invitation. If the invitation is in your mailbox, it's moved to your calendar.
Tentative	Accepts the invitation, but indicates on the event form that you might be unavailable.
Decline	Declines the invitation and creates a reply message so that you can provide an explanation

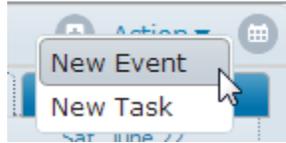


Note

If the person who invited you isn't on your server, a reply is always created for that person.

Creating events

To add an event to a calendar, choose **New Event** from the open calendar's **New** button, then complete the event form.



Shortcut

Double-click the start time in day or week view, or the day in month view.

When you have completed the form, click the **Done** button. If you close the form using the x button, you are asked how you want to handle this event.

If you decide you don't want the event after all, choose **Delete** from the form's menu.

Events that you create in a group calendar are added directly to that calendar or to your personal calendar (with copies placed in the group calendar). The group calendar's permissions determine which happens. These events appear to come from the group calendar, not from yourself.

The event form

The Event tab

This tab shows general information about the event.

Planning Meeting

You are invited to the following event by: Jo K. Schmo

Description:

Starts at:

Ends at:

Duration:

All day event:

Location:

Category:

Show as:

Color:

Visibility:

Time zone:

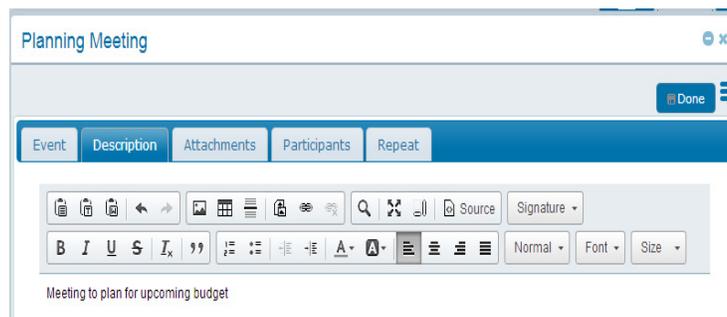
My reminders: None Time before event:

Icon:

Field	Description
Description	The event description as you want to see it on the calendar and in any reminders.
Starts at	The start date and time for the event. To change the date/time, click this field. The date/time popup lets you change the month, year, date (click the date to select it), and time (drag the sliders or click the slider bars to change the hour and minute).
Ends at	The end date and time for the event. To change the date/time, click this field and update the date/time popup as described above.
Duration	The length of time the event is scheduled to last, based on your start and end times. You can change the duration at this field. This updates the end time.
All day event	Makes this event last one day and displays the event at the top in day and week view.
Location	The location for the event. This field is for display purposes only. To book a location that is in the Directory, use the Participants tab. This updates that location's calendar, so others know the location has been booked.
Category	The type of event. To assign a category to this event, choose it at this field. Participants can change the category on their copies of the event.

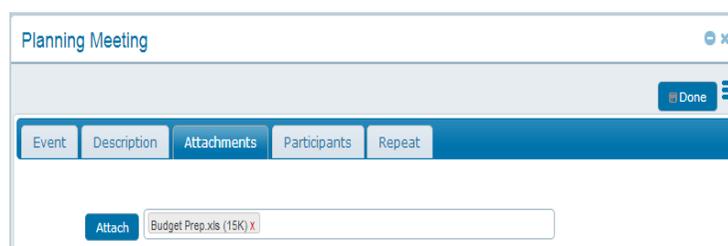
Show as	Your level of availability for other commitments during this event. To create an event for information purposes only, that doesn't generate conflicts, choose Free.
Color	The background color for this event on the calendar. You may want to color code certain events, for example, all meetings. Participants can change the color on their copies of the event. To assign a background color, click this field, then click the color on the color popup. You can also create a custom color by typing its hexadecimal value at Hex .
Visibility	Events with Normal or Company visibility can be opened by others viewing the calendar. Events with any other visibility can only be opened by the event creator and its participants. This behavior may change based on calendar permissions.
Time zone	The time zone for the event start and end times. This overrides the default time zone set in your preferences, allowing you to schedule events in different time zones.
My reminders	To generate a reminder, select Time before event , then choose when you want to see the reminder. Participants get reminders based on their own preferences.
Icon	The icon that represents this event. To change the icon, click this field, then click the icon you want from the icon popup.

The Description tab



This tab provides a place for you to type and format any additional information you want to provide about this event.

The Attachments tab

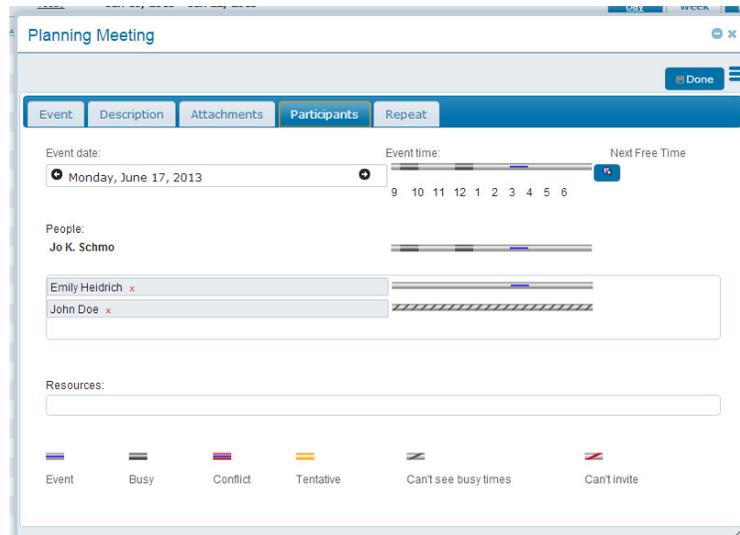


To attach a file that is on your computer to this event, click the Attach button, then browse for and select the file.

Shortcut

Drag the file to the tab. You can also drag an object that is on your server (such as a FirstClass document or an uploaded file) to the tab.

The Participants tab



This tab lets you invite others to your event, and book a location and resources. Bars on this tab indicate their availability. You can change the event date and time here to try to accommodate conflicts.

Field	Description
Event date	The event date as set on the Event tab. You can use the arrow buttons in this field to change the date one day at a time, or click the date to open a popup calendar.
Event time	The time period covered by this event as set on the Event tab. You can double-click this bar to change the start time.
Next Free Time	Makes FirstClass search for the next free time slot for all participants and location/resources.
People	<p>Invite people to your event by adding them in the field below your name. To add someone, address them as you would if sending them a message.</p> <p>The bar to the right of each person indicates their availability for this event, as described at the bottom of this tab.</p> <p>When they respond to your invitation, an icon beside them indicates whether they have accepted (green checkmark), accepted tentatively (yellow checkmark) or declined (x).</p> <p>If you use an Internet address when inviting someone, that person will receive a message with an iCalendar attachment. The recipient can import this attachment into their own calendaring application.</p>

Resources	<p>Book a location/resources for your event by adding them here. They must be in the Directory. To add a location or resource, use its name as it appears in the Directory.</p> <p>The bar to the right of each location/resource indicates its availability for this event, as described at the bottom of this tab.</p>
------------------	--

The Repeat tab

To make your event show up repeatedly on the calendar, choose the frequency at **Repeat interval**. Depending on your choice, you will see additional fields for fine-tuning the repeat interval.

For repeats by month, if you create the original event on the last Monday in the month (for example, August 30), then select **Same week day of the month**, the repeats will be created on the last Monday of each month. If you don't select this field, the repeats will be created on the same date of each month (September 30, October 30, and so on).

For repeats by year, if you create the original event on the first Wednesday of the year, then select **Same week day of the year**, the repeats will be created on the first Wednesday of each year. If you don't select this field, the repeats will be created on the same date each year.

For all repeat options, you can stop the repeats by clicking the **Repeat until** field, then selecting the last date to repeat this event from the popup calendar.

Changing events

To change event information, open the event and update it. If you were invited to this event, there are only limited changes you can make: you can change the color, category, and when (or if) a reminder will be generated. **These changes only affect your own copy.**

If you change the start date/time for an event you created, it will move to the new location on your calendar. The event is also moved and reflagged on participants' calendars.

**Caution**

Try to minimize updating events with participants. They can customize their copies of events, and your updates will override that customization. You can safely update the color, category, or reminder information, and this won't interfere with participants' copies.

If you delete a participant, the event is removed from that participant's calendar.

**Exception**

Updates won't be reflected in the calendars of users who are participants of an event created in a group calendar.

Changing repeating events

If you make a change to an event that is one of a series of repeating events, you will be asked which of the repeating events you want to change when you close the event.

Deleting events

If you delete an existing event that you created, that event is removed from all participants' calendars. If you didn't create the event, this deletion affects only your own copy.

Exception

Deletions won't be reflected in the calendars of users who are participants of an event created in a group calendar.

You can delete one occurrence of a repeating event, if you created the event. If you didn't create the event, deleting one occurrence will delete all occurrences on your calendar.

Tasks

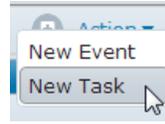
On the Tasks tab, incomplete tasks display x under Completed. If you're looking at a day earlier than today, you'll see completed tasks with a checkmark in this column and a description with a line struck through it.

Today		Jun 17, 2013	
Start Date	Due Date	Completed	Description
Mar 27, 2013, 09:00 AM	-	x	Pick up Laundry
Jun 17, 2013, 02:08 PM	-	✓	Remind everyone of Planning Meeting

Overdue tasks are shown in red. Urgent tasks are shown in bold at the top of the list of tasks.

Creating tasks

To add a task to a calendar, choose New Task from the open calendar's New button, then complete the task form.



When you have completed the form, click the Done button. If you decide you don't want the task after all, choose Delete from the form's menu.

The task form

The Task tab

This tab shows general information about the task.

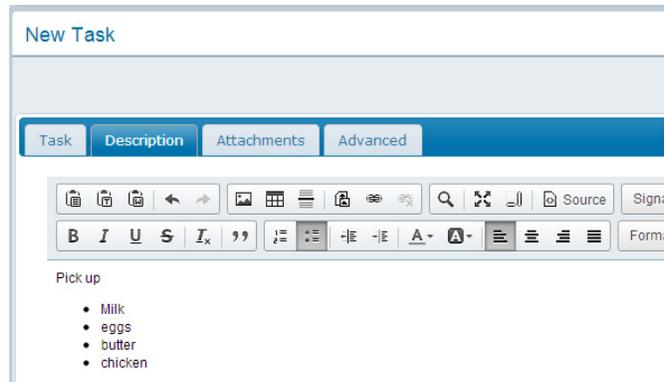
 A screenshot of the 'New Task' form. The form has a title bar 'New Task' and a tabbed interface with 'Task', 'Description', 'Attachments', and 'Advanced' tabs. The 'Task' tab is active. The form contains the following fields:

- Created by: Jo K. Schmo
- Description: Pick up fixings for Dinner
- Starts at: Monday, June 17, 2013 2:00 PM
- Due at: None
- Priority: Normal
- Category: (empty dropdown)
- Reminders:
 - None
 - Time before start and end: 1 Hour
- State: Not Completed on: Not Yet Complete

Field	Description
Description	The task description as you want to see it on the calendar and in any reminders.
Starts at	The start date and time for the task. To change the date/time, click this field. The date/time popup lets you change the month, year, date (click the date to select it), and time (drag the sliders or click the slider bars to change the hour and minute)
Due at	The due date and time for the task, if applicable. To change the date/time, click this field and update the date/time popup as described above. If there is no specific due date, accept None .
Priority	If you change the priority to Urgent , the task appears in bold at the top of the list of tasks.
Category	The type of task. To assign a category to this task, choose it at this field.

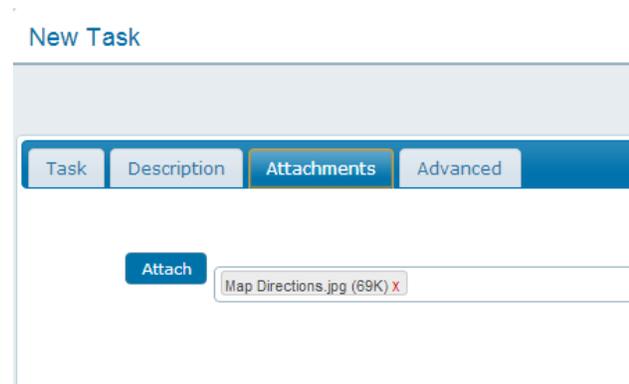
Reminders	Lets you generate reminders for this task. These reminders are generated before both the start and due dates. To generate reminders, select Time before start and end , then choose when you want to see the reminders.
State	The status of the task. Until the status of the task has changed, accept Not Completed .

The Description tab



This tab provides a place for you to type and format any additional information you want to provide about this task.

The Attachments tab

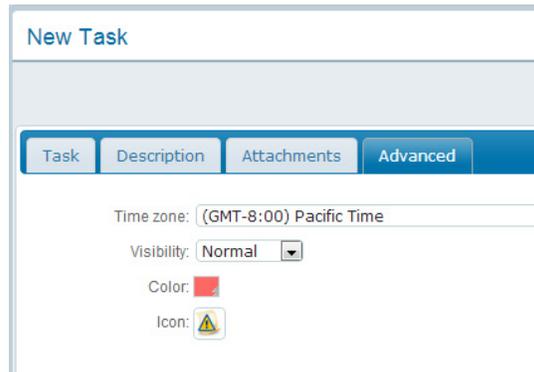


To attach a file that is on your computer to this task, click the Attach button, then browse for and select the file.

Shortcut

Drag the file to the tab. You can also drag an object that is on your server (such as a FirstClass document or an uploaded file) to the tab.

The Advanced tab



The screenshot shows the 'New Task' form with the 'Advanced' tab selected. The form contains the following fields:

- Time zone: (GMT-8:00) Pacific Time
- Visibility: Normal
- Color: Red
- Icon: Warning triangle

This tab shows the following information about the task:

Field	Description
Time zone	The time zone for the task start and due dates. This overrides the default time zone set in your preferences, allowing you to set tasks in different time zones.
Visibility	Tasks with Normal or Company visibility can be opened by others viewing the calendar. Tasks with any other visibility can only be opened by the task creator. This behavior may change based on calendar permissions.
Color	The background color for this task on the calendar. You may want to color code certain tasks, for example, all tasks with due dates in a particular time range. To assign a background color, click this field, then click the color on the color popup. You can also create a custom color by typing its hexadecimal value at Hex .
Icon	The icon that represents this task. To change the icon, click this field, then click the icon you want from the icon popup

Changing tasks

To change task information, open the task and update it.

If you change the start date/time for a task, it will move to the new location on your calendar.

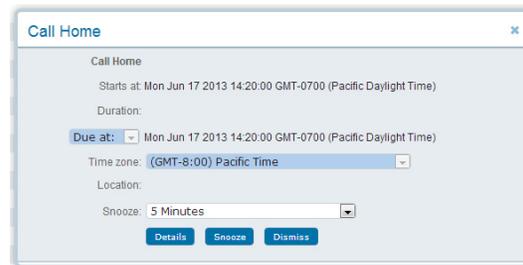
Changing task status

To change the status, choose it at the first **State** field on the **Task** tab. If the task has been completed, you can simply click the next field and update the popup calendar with the completion date. This automatically changes the status to **Completed**. Or, if the task was completed on the same day you are updating this form, you can just choose **Completed** and today's date will automatically display.

If you need to revert a completed task to the status of not completed, choose **Not Completed**. The completion date is automatically removed.

Reminders

Reminders pop up at the time you specified when you created an event or task.



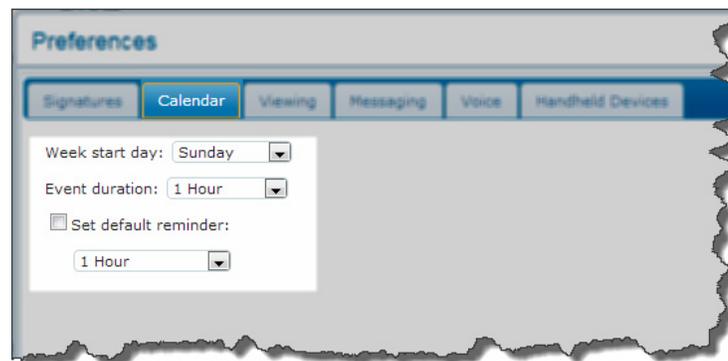
To open the event or task from a reminder, click the **Details** button. To close the reminder, click the **Dismiss** button.

If you want to be reminded again closer to the time, choose when to reopen the reminder at **Snooze**, then click the **Snooze** button.

If you aren't logged in when a reminder is due to open, it's mailed to you.

Customizing your calendar

You can customize your personal calendar by updating the Calendar tab on the Preferences form.



Field	Description
Week start day	The day that you want your week to start in week and month views, as well as the mini calendar.
Event duration	How long events that you create will last by default.
Set default reminder	Select this to set reminders on by default for events and tasks that you create. Choose the time before the events/tasks that you want to see reminders in the next field.

Combining calendars

You can view events and tasks from several calendars combined. For example, if you have access to a group calendar, you can open your personal calendar, then view the group calendar items along with the items in your personal calendar, to get a complete picture of your commitments.



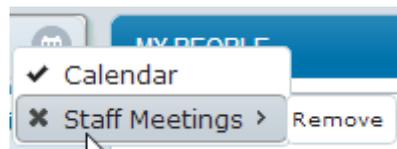
Note

This is just a special calendar view. You aren't actually adding these items to the calendar permanently, and they don't affect what FirstClass sees as your busy times.



If an open calendar has other calendars available for combining, you'll see a **Filter Calendar** button in the top right corner. Clicking this button displays a list of calendars.

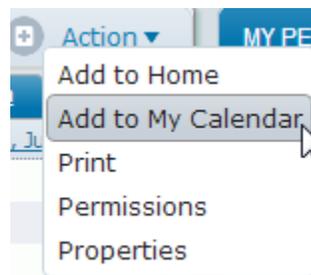
A calendar that is already combined in the open calendar view has a checkmark beside it. A calendar that isn't yet combined has an x beside it. Clicking a calendar in this list toggles its items in and out of the combined view, so you can view any combination of the listed calendars.



To remove a calendar from this list, hover over it, then choose Remove.

Making calendars available for combining

To add a public calendar to the filter list of your personal calendar, open the public calendar and choose **Add to My Calendar** at **Action**.



To add public calendar A to the filter list of public calendar B, you need to ensure there is a link to A on your homepage, then drag that link to B.



Warning

Don't drag an original calendar to another calendar, or you'll lose direct access to the original calendar, including its properties and permissions. This would mean, for example, that you wouldn't be able to update the original calendar's members.

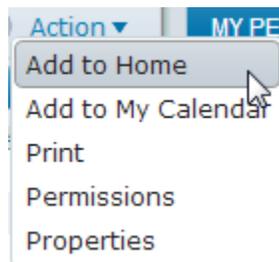
To create a link to an original calendar that is already on your homepage, open the calendar and make yourself a member as described below (you'll show up twice in the members' section of the permissions form).



Note

If you become confused as to which calendar is the original and which the link, ensure neither are in Recent Places, open one of them, then choose Properties at Action. The properties form indicates whether the object is an original or an alias.

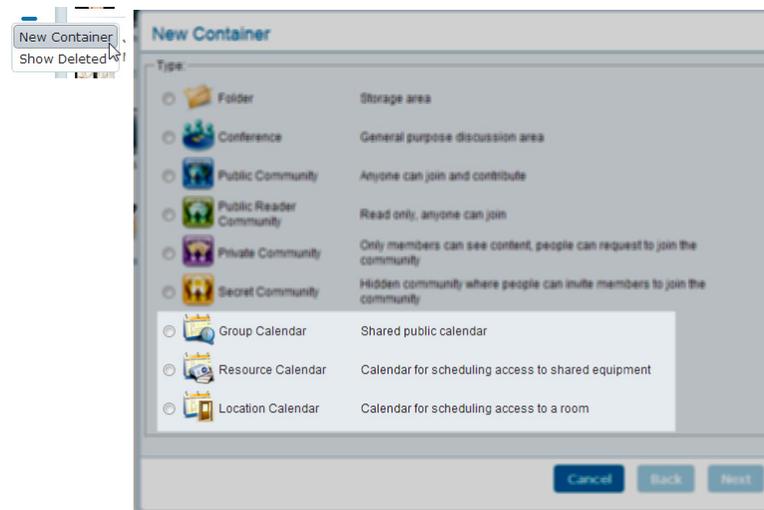
To create a link to a calendar that isn't yet on your homepage, open that calendar and choose **Add to Home** at **Action**.



If you want your personal calendar to be available in someone else's personal calendar, make them a member of your calendar as described below.

Creating calendars

You can create group, resource, and location calendars just as your administrator does. If you have trouble getting your calendars to work as you expect, contact your administrator.

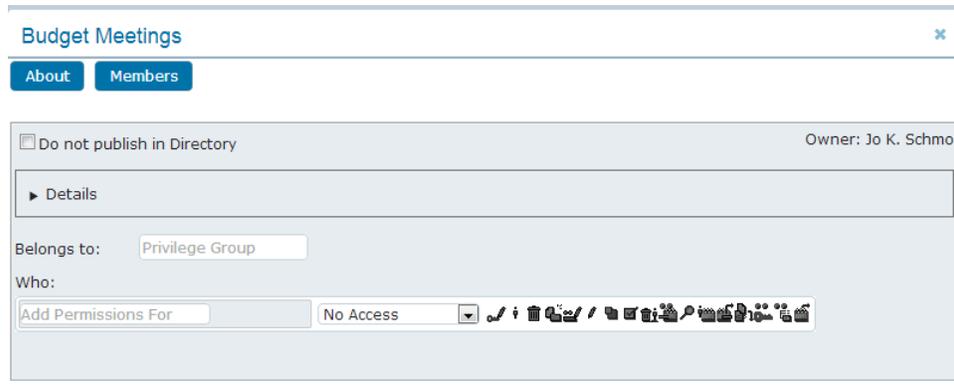


To create a calendar on your homepage, choose **New Container** from your homepage's menu, then select the type of calendar you want. Follow the prompts to give the calendar an icon and name, then click **Create**. The new calendar is added to the end of your homepage. If you want to protect it from being deleted by accident, open it, choose **Properties** at **Action**, then select **Protected**.

To create a calendar elsewhere, open the container where you want the calendar to be created and choose **New Container** from the container's **New** button. You can access the new calendar using the container's **Folders** button.

Setting calendar permissions

You use calendar permissions to control how the calendar behaves (for example, what others are able to do in the calendar).



To set calendar permissions, open the calendar, choose Permissions at Action, then fill in the permissions form:

This field	Does this
Do not publish in Directory	Prevents the calendar from showing up in the Directory. This keeps others from knowing about the calendar unless you tell them. It also means you can use any name you want for the calendar, without it conflicting with a published name. For resource and location calendars, we recommend you not select this checkbox. These calendars must be in the Directory to enable people to book when creating events in other calendars. We also don't recommend that you select this for your personal calendar.
Details > Item expiry	The number of days an event or task can stay in the calendar before expiring.
Belongs to	All calendars belong by default to calendar groups. Your administrator sets up calendar groups to control calendar behavior for groups as a whole. You'll see the groups that the new calendar belongs to here. You can add or remove calendar groups. To add a calendar group, type its name just as you would address a message to a conference. To remove a calendar group, click the x beside it. Unless you are familiar with calendar groups and how they affect behavior, we recommend you leave this field as is.
Who	This is the area where you set permissions that control what others can do in the calendar. It's described in the next section.

Your changes are automatically saved when you close this form by clicking the x button in the top right corner.

Giving others access to the calendar

Because public calendars are collaborative areas, you need to give others access to the new calendar. To do this, you first set permissions that control what they can do in the calendar, then you make the calendar available to them.

To specify what you want someone to be able to do in the calendar, update the **Who** section of the permissions form. You must do this for every person and group with access to the calendar.

First, enter the person's name under **Who** just as you would address a message to them. The order in which you list people matters, because when someone opens the calendar, FirstClass checks the **Who** list from the top down. When it finds the first occurrence of this person, or the first group to which they belong, it uses the permissions it finds there. This means that if the first thing you list is the **All Users** group, and make the access for that group **No Access**, no one will be able to access the calendar.

Second, choose the access level for the person in the field to the right of their name. Access levels are predefined sets of permissions. You can assign an access level as is, or customize it by selecting and clearing the individual permissions which follow.

This level	Gives these permissions
No Access	Prevents the person from viewing the calendar or adding items to it. We recommend that you add the All Users group at the end of your list with this access level, to prevent anyone from inadvertently being able to access the calendar.
See Times	The person can view the calendar, but only see the times set aside for events and tasks. They can't add events to the calendar. Instead, their invitations are sent to invitees' mailboxes.
Schedule Only	The person can add events to the calendar indirectly. An event is added indirectly to a group calendar when someone creates an event in another calendar and invites the calendar owner. An event is added indirectly to a location or resource calendar when someone books the location or resource.
Schedule + Times	The person can view the calendar (times only) and add events indirectly.
Schedule + Details	The person can see popup details on the calendar and add events indirectly. They can't open items or create events directly in the calendar.

Editor	The person has all the previous permissions, plus can open items, edit and delete items, create events directly in the calendar, download attachments, and view item history. Events created indirectly remain uneditable.
Custom	Access is defined by the individual permissions that are selected. If you add or remove individual permissions for someone with another access level, their access level automatically becomes Custom .

Individual permissions

The icons to the right of the access level field represent the individual permissions that make up the levels. To toggle a permission on and off, click its icon.

Limitation

Be aware that certain permissions will only work if the person has been given appropriate privileges by your administrator.

From left to right, the individual permissions are:

Permission	Meaning
Edit permissions 	The person can edit this permissions form. This includes adding people at Who and subscribing them.
Moderator 	Doesn't apply to calendars.
Delete any item 	The person can delete any item, including items added by others.
Create items 	The person can create events and tasks directly in the calendar, and move items into the calendar.
Edit read-only items 	The person can edit items that aren't normally editable (items created directly by others). Events created indirectly remain uneditable. For this permission to work, you must also select the Edit items permission. Be cautious about selecting the Edit read-only permission, because it overrides normal FirstClass behavior.
Edit items 	The person can edit any normally editable event or task.
Save window and view properties 	Doesn't apply to calendars.
Approve items 	Doesn't apply to calendars.

Delete own items 	The person can delete and change the properties of their own items.
View unrestricted details 	The person can see the details of items with unrestricted visibility levels. This lets them see popup details for closed items.
Search items 	The person can search the calendar. Requires the Search privilege.
Add participants 	<p>The person can update the calendar directly. For this permission to work, you must also select the Create items permission.</p> <p>For resource and location calendars, people without this permission must always book by creating an event in another calendar.</p> <p>If someone doesn't have this permission for your personal calendar, events to which they invite you will appear in your mailbox.</p>
Open items 	The person can open events and tasks.
Download files & attachments 	The person can download attached files. Requires the Download privilege.
View permissions 	The person can view this permissions form, but not edit it.
View history 	The person can view the history of items.
Open calendar 	The person can open the calendar. This lets them see the times for events and tasks, but no other details.

Making the calendar available

To make the calendar available to someone, either create it in a container to which they already have access, or make them a member of the calendar. Making them a member of your personal calendar adds the calendar to their personal calendar's filter list. Making them a member of a public calendar puts a link to that calendar on their homepage.

To make someone a member of the calendar, click the **Members** button on the calendar's permissions form. Enter the person's name in the **Members** section just as you would address a message to them. You can also add user groups here, if you want to give whole groups access to the calendar.

Budget Meetings [x]

About **Members**

Do not publish in Directory Owner: Jo K. Schmo

► Details

Belongs to:

Who:

<input checked="" type="checkbox"/> Staff	Custom	[Icons]
<input checked="" type="checkbox"/> All Users	No Access	[Icons]
<input type="text" value="Add Permissions For"/>	No Access	[Icons]

Members

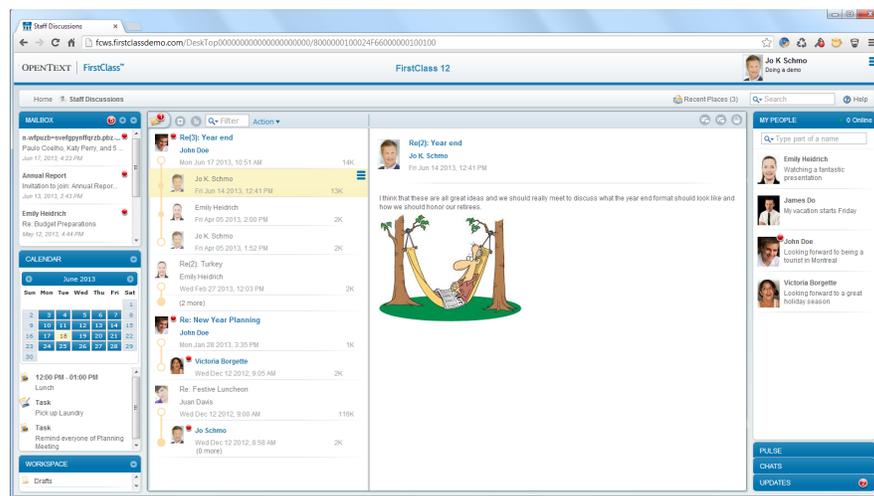
Conferences

About conferences



A FirstClass conference is an online forum for multiple people in your organization to exchange information. You can send a message to a conference instead of sending it to many recipients. You can also create collaborative documents in a conference, and upload files to it.

Conferences can be created by your administrator or by yourself and other users. On your homepage, you'll see only those conferences you have created there, or to which you have been subscribed.

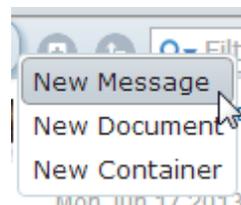


The conference owner determines what you can do in their conference. For example, you may only be able to read material in a conference that covers personnel policies, but also be able to add material to a conference that deals with a project you're working on. In this scenario, the personnel conference serves to broadcast information without the need to send private messages to all concerned. The project conference lets everyone involved in the project discuss it and add useful information.

Addressing messages to conferences

You address a message to a conference just as you would address a message to someone else in your organization, using the conference name as it appears in the Directory.

 To automatically address a message to a conference, open that conference, then create the message by clicking the **New** button and choosing **New Message**.



Replying to messages in conferences

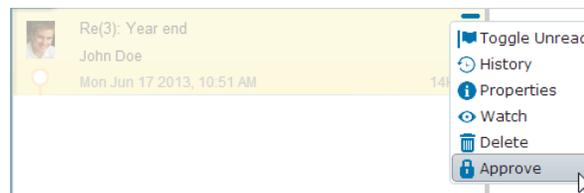
 You reply to a message in a conference just as you would reply to a private message in your mailbox. Open the message, then choose the option you want from the **Reply** menu. You can also choose to forward the message by clicking the **Forward** button.



If you simply choose **Reply**, the reply is sent to the conference's default reply recipients. Often, this means the reply just goes to the conference itself.

Approving messages in conferences

A conference may be moderated to ensure that everything sent to it is appropriate. In a moderated conference, either all messages, or just messages with files attached, can't be read until a moderator approves them. Until that time, they appear dimmed or are hidden.

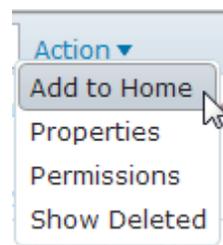


Only someone given permission as a moderator can approve these messages. If you have this permission, you can approve a message by selecting it and choosing **Approve** from its menu.

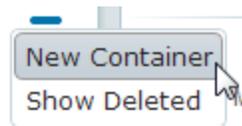
Adding Conferences to Home Screen

You may find a conference that you'd like to monitor by exposing subconferences in a conference that you already monitor. You can join this conference to put an icon of it on your homepage.

To join a conference, open it, then choose **Add to Home** at **Action**.

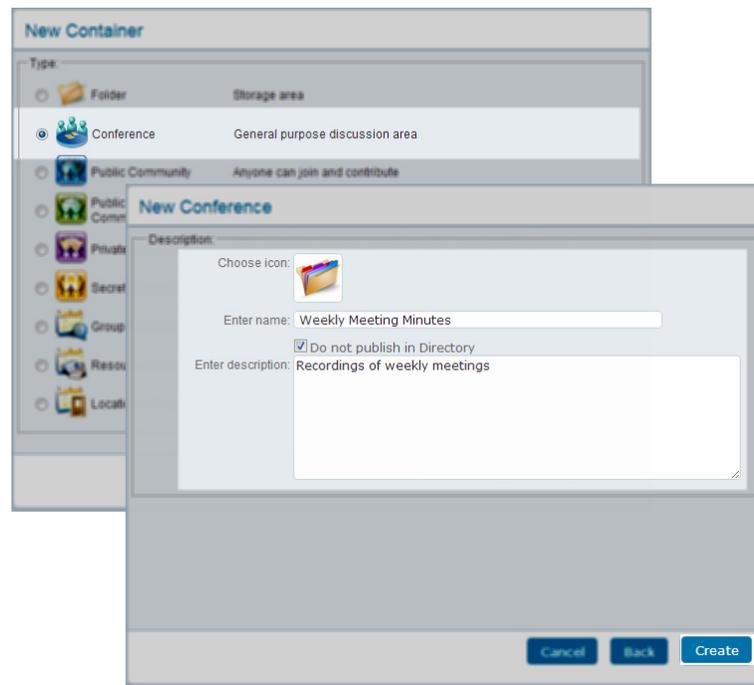


Creating conferences



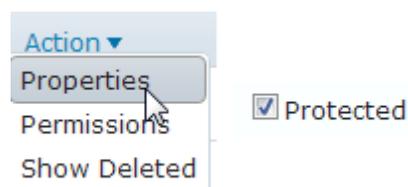
You can create conferences just as your administrator does. Conferences are a useful way for you to collaborate with a group of people that you define. If you have trouble getting your conferences to work as you expect, contact your administrator.

To create a conference on your homepage, choose **New Container** from your homepage's menu, then select **Conference**. Follow the prompts to give your conference an icon, name, and description.



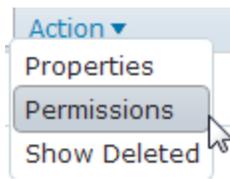
Select **Do not publish in Directory** if you want to prevent the conference from showing up in the Directory. This keeps others from knowing about your conference unless you tell them. It also means you can use any name you want for the conference, without it conflicting with a published name.

When you are done, click **Create**. Your new conference is added to the end of your homepage. If you want to protect it from being deleted by accident, open it, choose **Properties** at **Action**, then select **Protected**.



To create a conference elsewhere, open the container where you want the conference to be created and choose **New Container** from the container's **New** button. You can access your new conference using the container's **Folders** button.

Setting conference permissions



You use conference permissions to control how your conference behaves (for example, when messages expire and what others can do in the conference).

To set conference permissions, open your conference, choose Permissions at Action, then fill in the permissions form:

This field	Does this
Do not publish in Directory	You can change what you selected when you created the conference here.
View	To see this and other fields in this section, click the disclosure triangle. Use view from server and Use template view only are not currently applicable. If this will be a moderated conference, you can hide unapproved objects from all but moderators by selecting Hide unapproved items.
Message options	Choose the default form to be used when new messages are created in your conference at Form to use . If you don't want to dictate the default message form, leave the dash in this field. Choose the default method for addressing replies to the messages in your conference at Reply preference . Reply All replies to the sender and all other recipients. Reply Sender replies to the sender only. Reply Conference replies to the conference only. Default is used by your administrator when creating conferences.

Approval	<p>To make all messages sent to your conference require approval by a moderator, select Messages require approval.</p> <p>To make only messages with files attached, or files uploaded directly to your conference, require approval, select Attachments require approval.</p>
Size limit	<p>You can specify a maximum size for messages (message content plus attachments) posted to your conference at Limit messages above. Messages above this limit will be handled the way you specify in the next field.</p> <p>If you impose a size limit on messages, choose how you want oversized messages handled at Handling. Reject with NDN rejects the message and returns a nondelivery notice to the sender. This is probably the best option for most conferences, except conferences replicated to a non-FirstClass system such as the Internet. If a conference was an Internet newsgroup, NDNs would be sent back out to the Internet and from there to hundreds of thousands of sites. Reject and Report rejects the message without informing the sender, and reports the incident in a server log available to your administrator. Requires Approval accepts the message, but makes it unapproved. This is useful if your conference will be gatewayed and you are concerned about users posting messages with large attachments. Reject Quietly rejects the message and takes no further action. This is the best option if your conference will be gatewayed from a non-FirstClass system such as the Internet.</p>
Expiry	<p>You can specify a maximum number of objects allowed in your conference at Item limit. After this limit is exceeded, FirstClass begins to delete the objects with the oldest expiry dates.</p> <p>You can also specify the number of days a message can stay in your conference before expiring at Message expiry. Once a message has expired, FirstClass deletes it automatically as part of routine maintenance.</p>
Belongs to	<p>Unless you are familiar with conference groups and how they affect behavior, we recommend you leave this field as is.</p> <p>All conferences belong by default to conference groups. Your administrator sets up conference groups to control conference behavior for groups as a whole. You'll see the groups that your conference belongs to here. You can add or remove conference groups. To add a conference group, type its name just as you would address a message to a conference.</p>
Who	<p>This is the area where you set permissions that control what others can do in your conference. It's described in the next section.</p>

Your changes are automatically saved when you close this form by clicking the x button in the top right corner.

Giving others access to your conference

Conferences are intended as collaborative areas, so you probably want to give some other people access to your conference. To do this, you first set permissions that control what they can do in your conference, then you make your conference available to them.

The screenshot shows the 'Who' section of the permissions form. It contains a list of users and groups, each with a dropdown menu for their access level and a set of icons for individual permissions. The users listed are Emily Heidrich (Moderator), IT Staff (Contributor), and All Users (Disallowed). There is also an 'Add Permissions For' button.

To specify what you want someone to be able to do in your conference, update the **Who** section of the permissions form. You must do this for every person and group with access to your conference.

First, enter the person's name under **Who** just as you would address a message to them. The order in which you list people matters, because when someone opens your conference, FirstClass checks the **Who** list from the top down. When it finds the first occurrence of this person, or the first group to which they belong, it uses the permissions it finds there. This means that if the first thing you list is the **All Users** group, and make the access for that group **Disallowed**, no one will be able to access your conference.

Second, choose the access level for the person in the field to the right of their name. Access levels are predefined sets of permissions. You can assign an access level as is, or customize it by selecting and clearing the individual permissions which follow.

This level	Gives these permissions
Disallowed	Prevents the person from accessing your conference. We recommend that you add the All Users group at the end of your list with this access level, to prevent anyone from inadvertently being able to access your conference.
Summary	The person can look at the list of objects in your conference, but not open them.
Browser	The person has the permissions of Summary plus can open messages.
Reader	The person has the permissions of Browser plus can download attachments, view item histories, and search.
Contributor	The person has the permissions of Reader plus can send messages to your conference, delete any objects they added, and view this permissions form.
Approver	The person has the permissions of Contributor plus can read and approve unapproved messages.
Moderator	The person has the permissions of Approver plus can delete any items, move items to subcontainers, post messages that exceed the size limit, edit documents, create and move subfolders, and move subcontainers.

Creator	The person has the permissions of Moderator plus can change the conference view and sort order, and create subcontainers (if your administrator has given them the Create conference privilege).
Controller	The person has the permissions of Creator plus can edit this permissions form and messages sent by others.
Custom	Access is defined by the individual permissions that are selected. If you add or remove individual permissions for someone with another access level, their access level automatically becomes Custom .

Individual permissions

The icons to the right of the access level field represent the individual permissions that make up the levels. To toggle a permission on and off, click its icon.



Limitation

Be aware that certain permissions will only work if the person has been given appropriate privileges by your administrator.

From left to right, the individual permissions are:

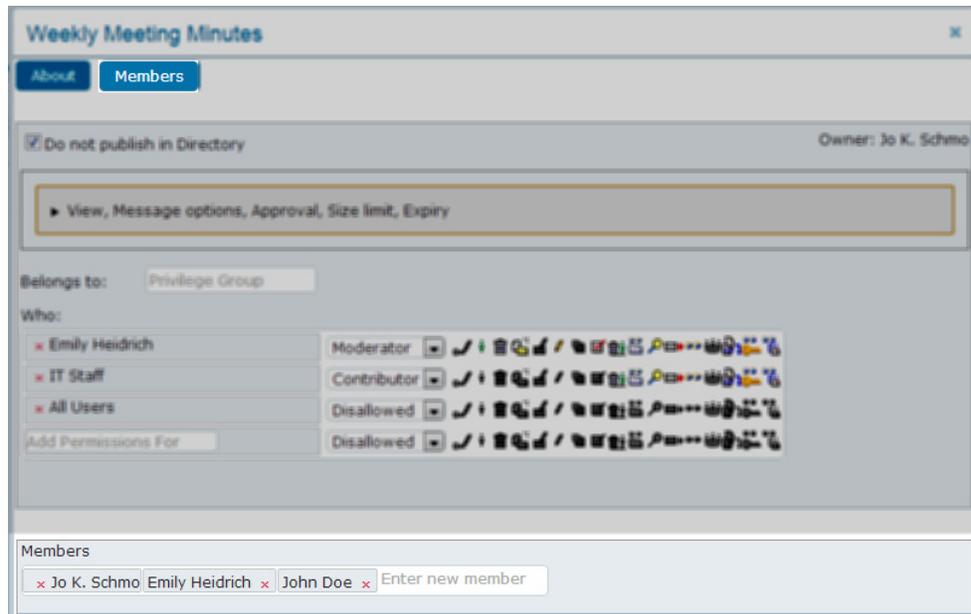
Permission	Meaning
Edit permissions 	The person can edit this permissions form. This includes adding people at Who and setting their permissions.
Moderator 	This just gives the person the Moderator label. The Approve items permission is required to enable the person to approve items.
Delete any item 	The person can delete any object, including messages sent by others, and move objects into subcontainers.
Create items 	The person can create documents and subcontainers, move objects into your conference, post oversized messages, and upload files without having to attach them to messages. Requires the Upload privilege.
Edit read-only items 	The person can edit objects that aren't normally editable, such as sent messages. For this permission to work, you must also select the Edit items permission. Be cautious about selecting the Edit read-only permission, because it overrides normal FirstClass behavior.
Edit items 	The person can edit any document and move subcontainers.
Save window and view properties 	Doesn't apply to conferences.

Approve items 	<p>The person can open and approve unapproved messages. Messages sent by this person are automatically approved.</p>
Delete own items 	<p>The person can delete and change the properties of their own objects.</p>
Open conference 	<p>The person can open your conference. This lets them see the objects in the conference, but not open them.</p>
Search items 	<p>The person can search your conference. Requires the Search privilege.</p>
Send items 	<p>The person can post messages to your conference. Requires the Conference mail privilege.</p>
Open items 	<p>The person can open messages and documents in your conference.</p>
Create subconferences 	<p>The person can create subcontainers in your conference. Requires the Share conferences privilege.</p>
Download files & attachments 	<p>The person can download attached files and files that have been uploaded directly to your conference. Requires the Download privilege.</p>
View permissions 	<p>The person can view this permissions form, but not edit it.</p>
View history 	<p>The person can view the history of objects in your conference.</p>

Making your conference available

To make your conference available to someone, either create it in a container to which they already have access, or make them members of your conference. Making someone a member puts a link to your conference on their homepage.

To make someone a member of your conference, click the **Members** button on the conference's permissions form. Enter the person's name in the **Members** section just as you would address a message to them. You can also add user groups here, if you want to give whole groups access to your conference.



Weekly Meeting Minutes

About Members

Do not publish in Directory Owner: Jo K. Schmo

► View, Message options, Approval, Size limit, Expiry

Belongs to: Privilege Group

Who:

Emily Heidrich	Moderator	
IT Staff	Contributor	
All Users	Disallowed	
Add Permissions For	Disallowed	

Members

Jo K. Schmo Emily Heidrich John Doe Enter new member

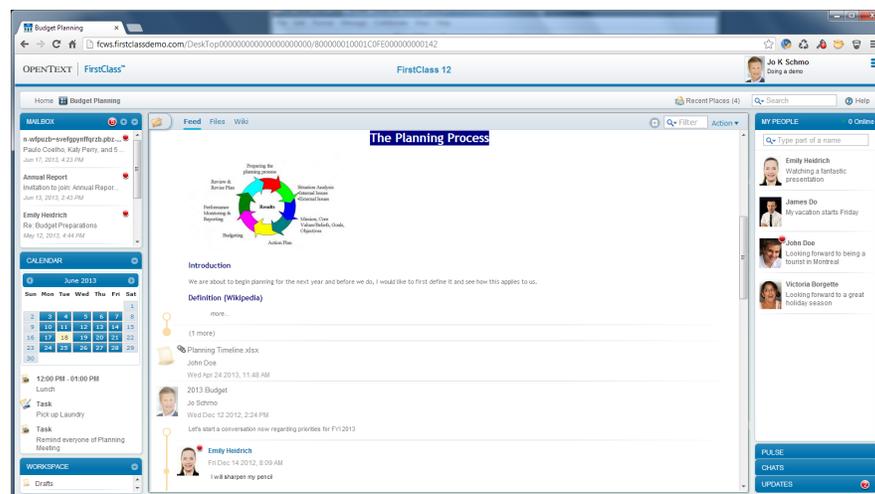
Communities

What is a community?



A community supports a group of people who share a common interest. You may be part of a community that includes everyone in your department. Or everyone working on that special budget project. Or your skiing buddies. Communities let you take part in discussions and share information within these groups. Communities and conferences serve many of the same purposes. Communities also support communally developed wikis.

You can create your own communities to suit your needs. And others can also create communities and invite you to join.



You'll see all the communities to which you currently belong on your home page, intermixed with your other homepage containers. If you want to see general information about a community while visiting it, choose **About Community** from the community's **Action** menu. To see who belongs to a community, choose **Members**.

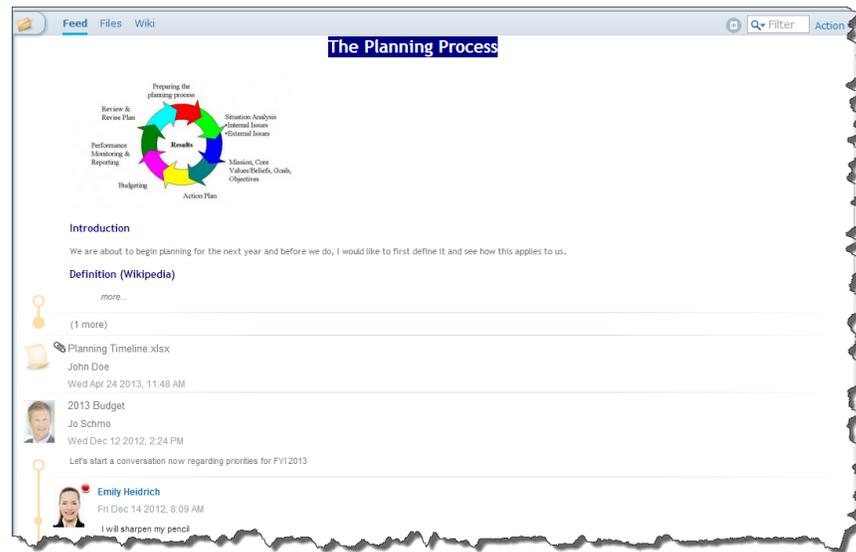
What you can do in a community

Within a community, you can:

- carry on discussions
- upload files of interest to everyone in the community
- create and update wikis

The feed

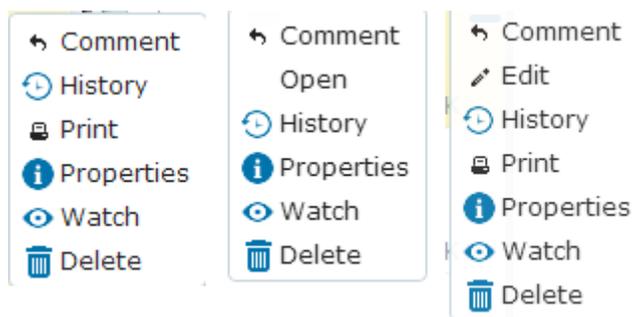
When you visit a community, you first see the feed. This is a list of all community activity, in chronological order. You can carry on discussions here, and FirstClass also posts a link here whenever a file is uploaded or a wiki page is created or updated. Posts to the feed that have been commented on are threaded, just like messages with replies in conferences.



A post that is especially long is partially displayed, followed by a **more** link. To see the whole post, click that link.

What you can do with posts

 You can do the following from a selected post's menu. The type of post dictates what actions you'll see.



This action	Does this
Comment	Lets you respond to a post. Type and format your response, then click Post .
Edit	Lets you update a wiki page.

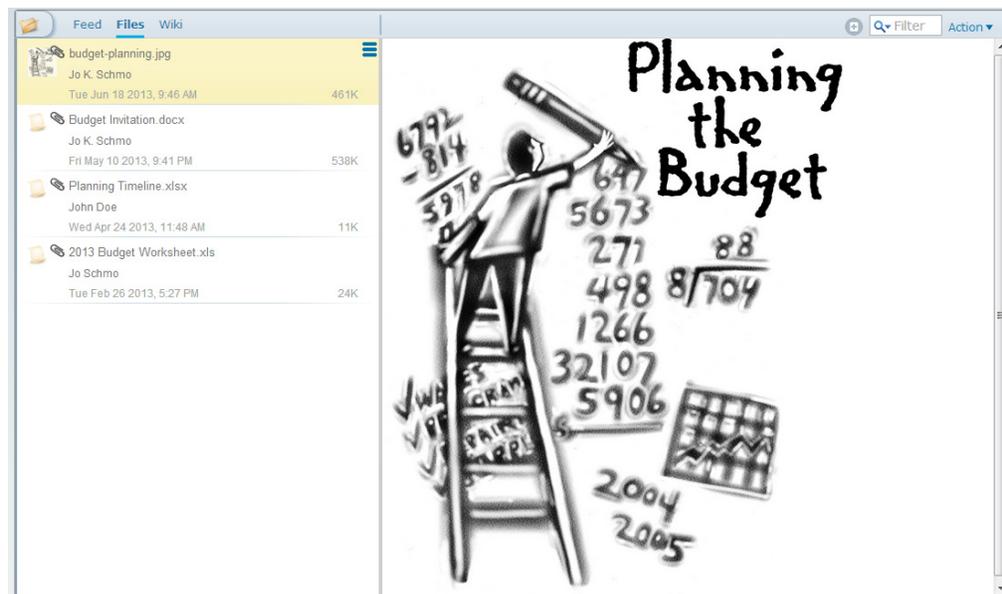
Note

Your spelling is checked as you type. To see suggestions for a word that is underlined in red, Control (Command)/right-click the word.

Field	Description
Subject	The subject of the discussion.
To	The name of the community to which you are posting. This can't be updated.
Attach	Attaches a file that is on your computer to the post. Browse for and select the file after you click this button. As a shortcut, or to attach an object that is on your server (such as a message or an uploaded file), drag the file or other object to the discussion form's envelope.
Post	Posts the discussion and closes the new discussion form.
menu in top right corner 	Delete deletes the post, if you decide you don't want to post it after all.

Files

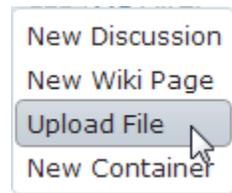
When you click **Files** at the top of an open community, you see a list of the files that have been uploaded to this community.



You can use a file's menu to work with a file just as you work with a post in the feed. Where your browser supports the file's format, it will also be displayed in the right pane when selected.



To upload a file that is on your computer, choose **Upload File** from the community's **New** button, then browse for and select the file.



Shortcut

Drag the file to the list of files. You can also drag an object that is on your server (such as a FirstClass document or an uploaded file) to this list if you first close the community so it is in **Recent Places**.

Wikis

When you click **Wiki** at the top of an open community, you see a list of the wiki pages that have been created in this community. Everyone in the community can view and update these pages.

The screenshot shows the 'Wiki' tab selected in the top navigation bar. On the left, a list of wiki pages is displayed, including 'Budget Timelines' by Jo K. Schmo and 'Budget Updates' by Emily Heidrich. The main content area shows the 'Budget Timelines' page, which includes a table with the following data:

January 2013	Executive members review current budgets and plan for changes
March 2013	Executive team reviews all member budget submissions and finalize for the board
June 2013	Board ratification
July 1 2013	New Fiscal Year

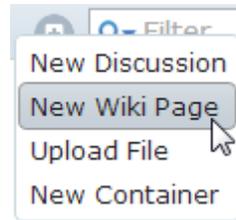
Below the table, a red text message states: "The budget is now finalized and ready for presentation to the Board". An 'Edit' button is visible in the top right corner of the page view.

You can use a wiki page's menu to work with a wiki page just as you work with a post in the feed.



To update a wiki page, select it and choose **Edit** from its menu, or open it and click the Edit button. This prevents anyone else from updating it at the same time.

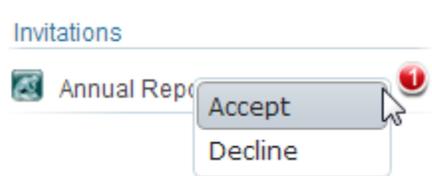
- To create a wiki page, choose **New Wiki Page** from the community's **New** button, then fill in the form just as you would when creating a document. **Tags** are keywords that people can search on. Separate each keyword with a space.



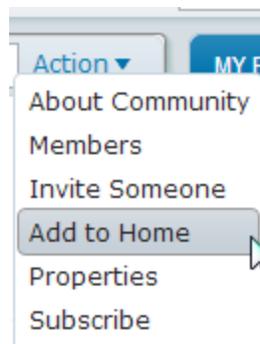
Joining communities

There are several ways to add communities to your home page. Some communities will simply be there because your FirstClass administrator has added them. Other people may invite you to join their communities. Or you may uncover communities on your own, and decide you want to join them.

If you're invited to join a community, you'll see the invitation in the **Invitations** section of the **UPDATES** pane. You can open the community by clicking the invitation. To join the community, choose **Accept** from the invitation's menu. If you don't want to join the community, choose **Decline**.



If you find a community that sounds interesting on a search results page, you can click it to open it. If you decide you want to join, choose **Add to Home** at **Action** to add it to your homepage.



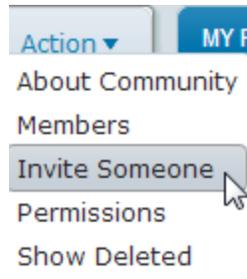
Limitations

You can't open private communities. If you click a private community, you are prompted to send a request to join to the community.

Some communities will let you read, but not post.

Inviting others to join communities

You can invite people to join any communities that you created or any **Public** community. You may also have been given permission to invite others by a community creator.



To invite someone to a community, open it, then choose **Invite Someone** at **Action**. Type your invitation at **Message to new members**. At People to invite, enter the person's name just as you would address a message to them. You can invite multiple people. When you are done, click **Invite**.

Everyone you invited will see your invitation in the **Invitations** section of their **UPDATES** pane.

Inviting External Users to join communities

If your administrator has given you the **Community Peer Register** permission, you can invite external users to your community, to Public communities, or to any community where you have been given that permission by the community owner.

When inviting others to join your community, if you enter a name that is not in the **directory**, or if you enter an external email address, a new dialog will appear asking you to complete some registration information.

When done, click **Invite**. An account will be created and an invitation to join will be sent to the new user.



Note

It is important to note that the new account will have limited access to content on your server. Access is determined by the system administrator, but typically, the new account will only be able to see and participate in the community to which they have been invited. These new, peer registered accounts will also not have access to the profiles or blogs of other regular users on the system.

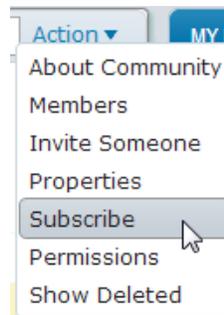
Dealing with requests to join

If you are a community creator or moderator, and see a request to join your private community posted to the feed, you can allow this person to join by choosing Accept Request from the request's menu. This sends an invitation to the requestor.



Keeping track of activity when you aren't connected

If you'd like to keep track of community activity when you aren't connected to your FirstClass server, you can subscribe to the community's feed. FirstClass will then email you copies of all posts to the community.



To subscribe, choose **Subscribe** at the community's **Action** menu, then select the type of feed you want on the subscription form. **Email me everything** will send you a copy of everything that is added to the community's feed. **Email me a Daily Digest** will send you a daily summary of the previous day's activity.

To stop receiving these emails, select **None** on the subscription form.

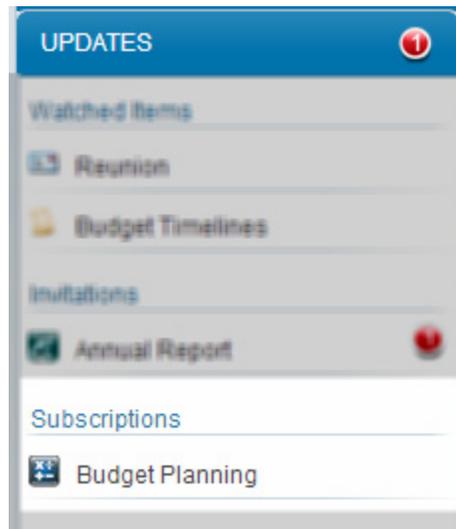
Retirement Planning Email Subscription:

None
 Email me everything
 Email me a Daily Digest

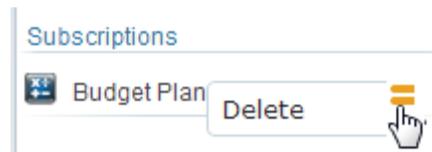
[Close](#)

If you are using another email system, see “How to get FirstClass notifications” on page 105 to ensure that the subscription notifications will reach you.

Once you have subscribed to a community, a new item will appear in the **Updates** area under **Subscriptions**



If you no longer wish to receive updates to a community feed, you can remove the subscription.



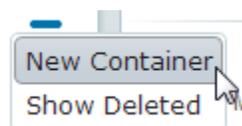
Creating communities

You can create your own communities and invite others to join.



Note

When deciding what to name your community, keep in mind that your organization may not allow the use of standard email characters such as @ in community names. If in doubt, check with your administrator about any restrictions on characters.



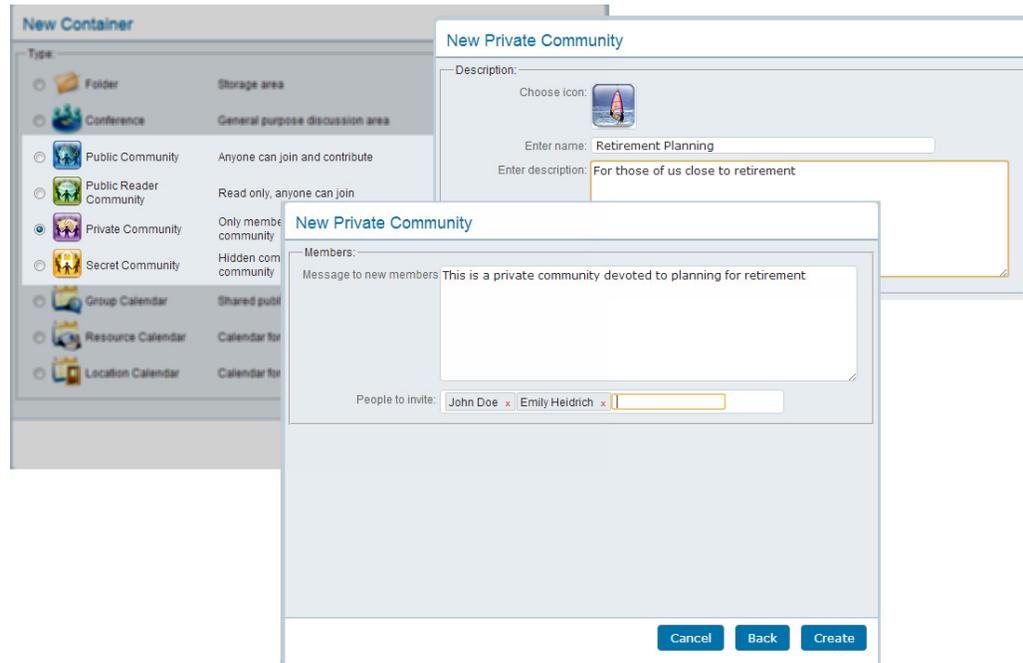
To create a community on your homepage, choose **New Container** from your homepage's menu, then select the type of community you want. Follow the prompts to give your community an icon, name, and description, and invite others to join.



Tip

You may want to invite others after you have set up the permissions that control what they can do in your community. If so, you can skip that step in the creation process.

When you are done, click **Create**. Your new community is added to the end of your homepage.

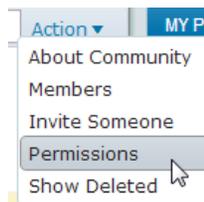


To create a community elsewhere, open the container where you want the community to be created and choose **New Container** from the container's **New** button. You can access your new community from the container's **Folders** button.

Limitation

The owner of a community can create any type of subcontainer inside it. Community members can only create folders inside that community, unless the owner changes the community's permissions.

Setting community permissions



You use community permissions to control how your community behaves (for example, when posts expire and what others can do in the community).

To set community permissions, open your community, choose **Permissions** at **Action**, then fill in the permissions form:

✕
Retirement Planning

About Members

Do not publish in Directory Owner: Jo K. Schmo

▼ View, Message options, Approval, Size limit, Expiry

View

 Use view from server Use template view only Hide unapproved items

Message options

Form to use: -

Reply preference: Default

Approval

 Messages require approval Attachments require approval

Size limit

Limit messages above:

Handling: Reject with NDN

Expiry

Item limit:

Message expiry (days):

Belongs to: x Private Community Privilege Group

Who:

Disallowed
✎
✖
🗑️
🔍
🔗
🔒
🔓
🔧
🔙
🔚
🔛
🔜
🔝

This field	Does this
Hide unapproved items	Hides unapproved objects from all but moderators. This only applies if this will be a moderated community.
Approval	To make all posts sent to your community require approval by a moderator, select Messages require approval . To make only posts with files attached, or files uploaded directly to your community, require approval, select Attachments require approval .
Size limit	You can specify a maximum size for posts (post content plus attachments) posted to your community at Limit messages above . Posts above this limit will be handled the way you specify in the next field. If you impose a size limit on posts, choose how you want oversized posts handled at Handling . Reject with NDN rejects the post and returns a nondelivery notice to the sender. This is probably the best option for most communities, except communities replicated to a non-FirstClass system such as the Internet. If a community was an Internet newsgroup, NDNs would be sent back out to the Internet and from there to hundreds of thousands of sites. Reject and Report rejects the post without informing the sender, and reports the incident in a server log available to your administrator. Requires Approval accepts the post, but makes it unapproved. This is useful if your community will be gatewayed and you are concerned about users posting with large attachments. Reject Quietly rejects the post and takes no further action. This is the best option if your community will be gatewayed from a non-FirstClass system such as the Internet.
Expiry	You can specify a maximum number of objects allowed in your community at Item limit . After this limit is exceeded, FirstClass begins to delete the objects with the oldest expiry dates. You can also specify the number of days a post can stay in your community before expiring at Message expiry . Once a post has expired, FirstClass deletes it automatically as part of routine maintenance.
Belongs to	Unless you are familiar with community groups and how they affect behavior, we recommend you leave this field as is. All communities belong by default to community groups. Your administrator sets up community groups to control community behavior for groups as a whole. You'll see the groups that your community belongs to here. You can add or remove community groups. To add a community group, type its name just as you would address a message to a conference.
Who	This is the area where you set permissions that control what others can do in your community. It's described in the next section.

Your changes are automatically saved when you close this form by clicking the x button in the top right corner.

Giving others access to your community

Communities are intended as collaborative areas, so you probably want to give some other people access to your community. If you didn't invite people as part of the community creation process, you can first set permissions that control what they can do in your community, then invite them to join.



Note

An alternative way to add members to your community is to choose **Members at Action** or use the **Members** button on the permissions form. Enter a person's name just as you would address a message to them. You can also add user groups here, if you want to give whole groups access to your community.

To specify what you want someone to be able to do in your community, update the **Who** section of the permissions form. You must do this for every person and group with access to your community.



Note

By choosing the type of community at creation (Private, Public, Public (Read Only) or Secret) sets the permissions for everyone. All you really need to do is set permissions for any override person or group in the **Who** section.

First, enter the person's name under **Who** just as you would address a message to them. The order in which you list people matters, because when someone opens your community, FirstClass checks the **Who** list from the top down. When it finds the first occurrence of this person, or the first group to which they belong, it uses the permissions it finds there. This means that if the first thing you list is the **All Users** group, and make the access for that group **Disallowed**, no one will be able to access your community.

Second, choose the access level for the person in the field to the right of their name. Access levels are predefined sets of permissions. You can assign an access level as is, or customize it by selecting and clearing the individual permissions which follow.

This level	Gives these permissions
Disallowed	Prevents the person from accessing your community. We recommend that you add the All Users group at the end of your list with this access level, to prevent anyone from inadvertently being able to access your community.
Summary	Doesn't apply to communities.
Browser	The person can open your community.
Reader	The person has the permissions of Reader plus can download files and view item histories.
Contributor	The person has the permissions of Browser plus can post to your community, delete any objects they added, and view this permissions form.
Approver	The person has the permissions of Contributor plus can read and approve unapproved posts.
Moderator	The person has the permissions of Approver plus can delete any items and send posts that exceed the size limit.
Creator	Doesn't apply to communities.
Controller	The person has the permissions of Moderator plus can edit this permissions form and posts sent by others.
Custom	Access is defined by the individual permissions that are selected. If you add or remove individual permissions for someone with another access level, their access level automatically becomes Custom .

Individual permissions

The icons to the right of the access level field represent the individual permissions that make up the levels. To toggle a permission on and off, click its icon.

Limitation

Be aware that certain permissions will only work if the person has been given appropriate privileges by your administrator.

From left to right, the individual permissions are:

Permission	Meaning
Edit permissions 	The person can edit this permissions form. This includes adding people at Who and setting their permissions.
Moderator 	This just gives the person the Moderator label. The Approve items permission is required to enable the person to approve items.
Delete any item 	The person can delete any object, including posts sent by others.

Create items 	The person can create wiki pages, move objects into your community, send oversized posts, and upload files without having to attach them to posts. Requires the Upload privilege.
Edit read-only items 	The person can edit objects that aren't normally editable, such as sent posts. For this permission to work, you must also select the Edit items permission. Be cautious about selecting the Edit read-only permission, because it overrides normal FirstClass behavior.
Edit items 	The person can edit any wiki page.
Save window and view properties 	Doesn't apply to communities.
Approve items 	The person can open and approve unapproved posts. Posts sent by this person are automatically approved.
Delete own items 	The person can delete and change the properties of their own objects.
Open community 	The person can open your community.
Search items 	The person can search your community. Requires the Search privilege.
Send items 	The person can post to your community. Requires the Conference mail privilege.
Open items 	The person can open files and wiki pages in your community.
Create subconferences 	The person can create subcontainers in your community. Requires the Share conferences privilege.
Download files & attachments 	The person can download attached files and files that have been uploaded directly to your community. Requires the Download privilege.
View permissions 	The person can view this permissions form, but not edit it.
View history 	The person can view the history of objects in your community.

Your profile and blog

About your profile

Your profile contains your picture, plus personal and contact information that gives others a snapshot of who you are and how to get in touch with you. You can also maintain a blog in your profile that gives even more information about your interests and experience.



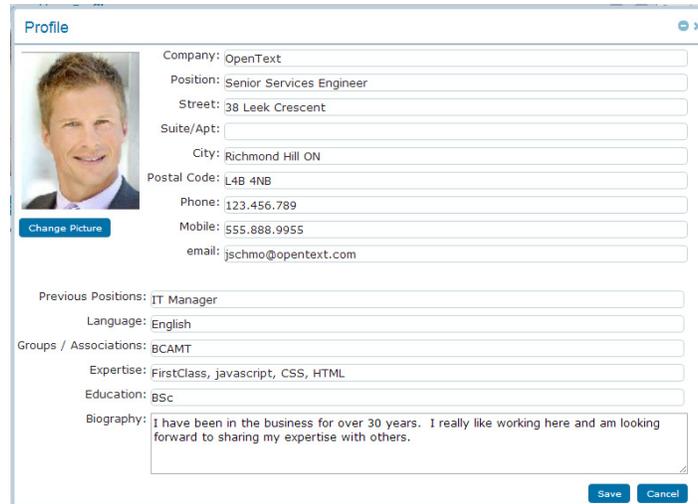
FirstClass is all about people working together, so filling in your profile is key.

To open someone's profile in a popup window, click their picture wherever you see it as a sender (for example, in a list of messages) or in a list of Directory name matches.

To open their full profile, including their blog, click their picture in your people list or the Pulse. This is also what you'll see if you click your picture in the top right corner of your desktop.

Updating your profile

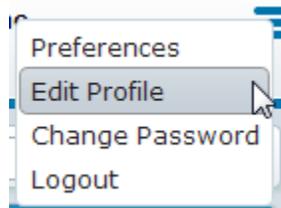
When you first use FirstClass, you'll see a generic placeholder picture in the top right corner of your desktop. This is just here until you replace it with a picture of yourself.



The screenshot shows a web browser window titled "Profile". On the left is a profile picture of a man with a "Change Picture" button below it. The main area contains a form with the following fields:

- Company: OpenText
- Position: Senior Services Engineer
- Street: 38 Leek Crescent
- Suite/Apt:
- City: Richmond Hill ON
- Postal Code: L4B 4N8
- Phone: 123.456.789
- Mobile: 555.888.9955
- email: jschmo@opentext.com
- Previous Positions: IT Manager
- Language: English
- Groups / Associations: BCAMT
- Expertise: FirstClass, javascript, CSS, HTML
- Education: BSc
- Biography: I have been in the business for over 30 years. I really like working here and am looking forward to sharing my expertise with others.

At the bottom right of the form are "Save" and "Cancel" buttons.

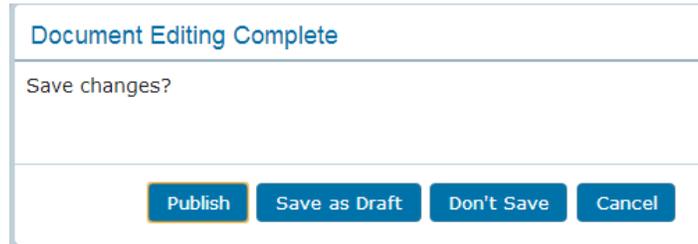


To update your profile, choose **Edit Profile** from the desktop menu, then fill in the profile form. You can also open your full profile, click **Profile** at the top, then click the Edit button.

To update your picture with any picture on your computer that is in one of the common graphics file formats, click **Change Picture**, then follow the prompts to browse for and select the file, crop it to remove any unwanted elements, and upload it.

The picture will be automatically sized to fit the profile picture space.

At any stage, you can click on **Done** and then choose to either **Publish**, or **Save as Draft**

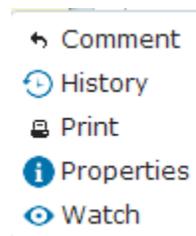


If you choose to **Save as Draft**, your blog will not be visible to others until you **Publish** it.

To update an existing blog entry, select it, then choose **Edit** from its menu.

What you can do in others' blogs

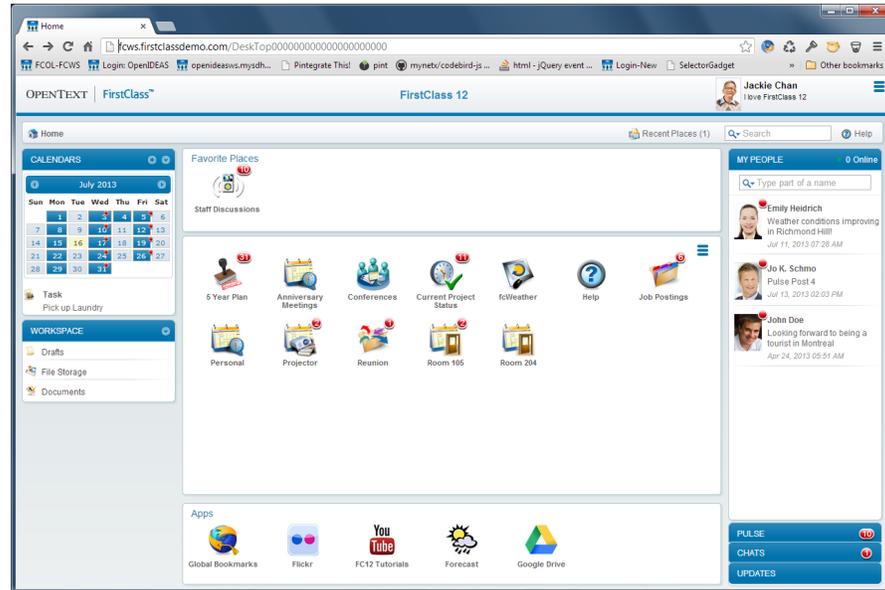
You can do the following from a selected entry's menu in someone else's blog:



This action	Does this
Comment	Lets you respond to an entry. Type and format your response, then click Post.
History	Shows previous activity for this entry.
Print	Displays your computer's standard print form to print this entry.
Properties	Shows additional details for this entry.
Watch	Monitors this entry for any new activity. The entry is added to Watched Items in the UPDATES pane.

If you use another mail system

If your organization uses another mail system, you'll see a few changes to what is documented in this document. The rationale is that you already have a private mailbox, personal calendar, and private contacts on your other system.



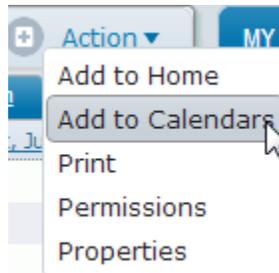
Email

You won't see a MAILBOX pane, and you can't use private email. You can only address messages to conferences and post to communities.

Calendars

You'll see a CALENDARS pane instead of CALENDAR. This isn't a personal calendar, but rather a place where you can combine views of other calendars and create tasks. You can't create events here, but you can in group calendars, with one limitation. You can only invite people external to FirstClass (people with an Internet email address) to your events.

If you want to add a calendar that is inside a container to the list of calendars you can combine, choose Add to Calendars.



Contacts

You won't see a Contacts folder in the WORKSPACE pane.

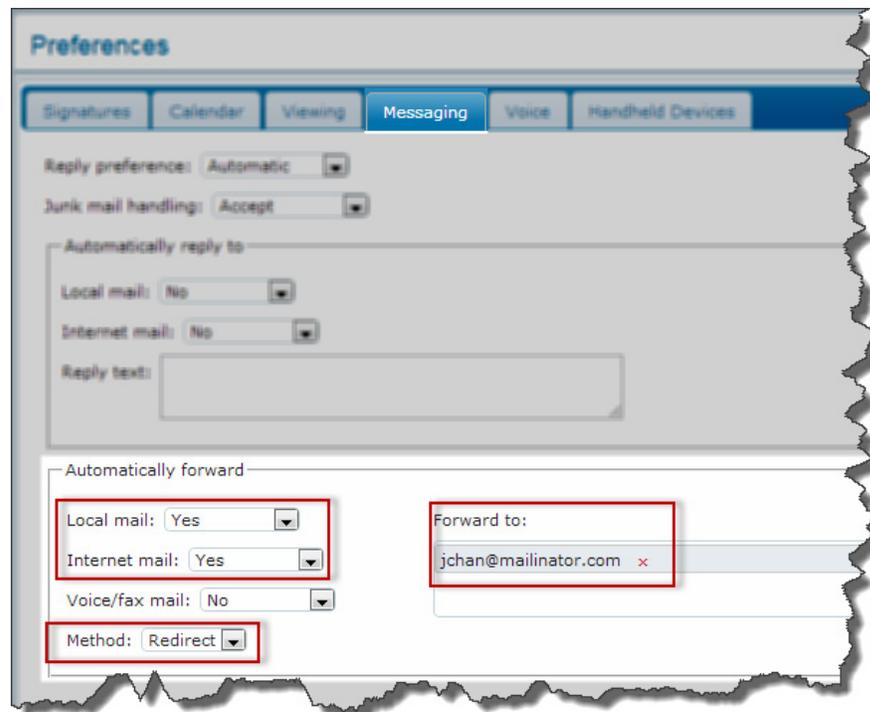
Other user information

If you open permissions forms or membership lists, you won't see anyone who is external to FirstClass.

How to get FirstClass notifications

You must supply an email address so that FirstClass will know where to send system notifications (such as calendar reminders and subscription notices when you aren't logged in).

To supply this address, choose **Preferences** from the desktop menu, click the **Messaging** tab, then type your email address at Forward to and choose **Redirect** at **Method**. You must also ensure that both Local Mail and Internet Mail are set to **Yes**.



The screenshot shows the 'Preferences' dialog box with the 'Messaging' tab selected. The 'Automatically forward' section is expanded, showing the following settings:

- Local mail: Yes
- Internet mail: Yes
- Voice/fax mail: No
- Method: Redirect
- Forward to: jchan@mailinator.com

Red boxes highlight the 'Local mail: Yes', 'Internet mail: Yes', 'Method: Redirect', and 'Forward to: jchan@mailinator.com' fields.

Formatting FirstClass content

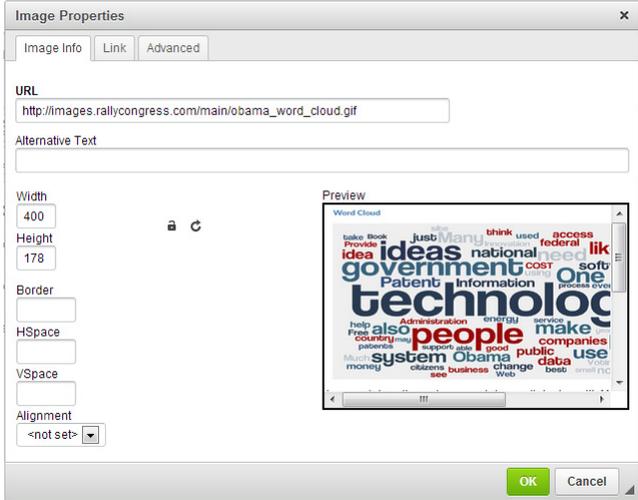
You'll see edit buttons when you are adding content to objects such as a message, calendar event, or community post. The object you are editing determines which buttons you'll see.

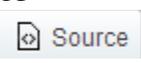


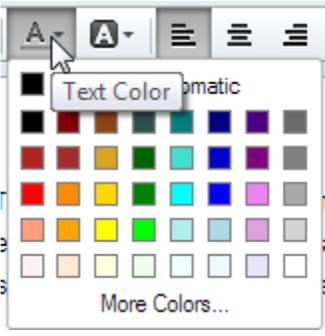
Note

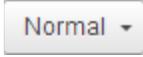
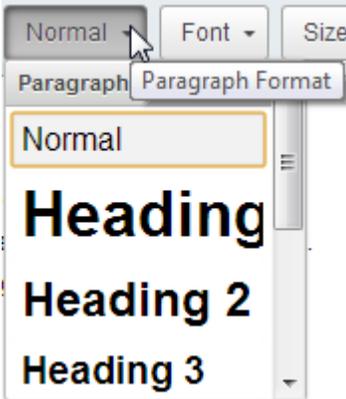
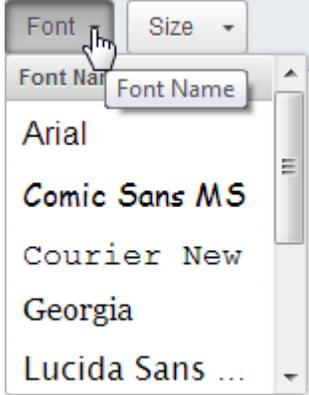
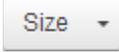
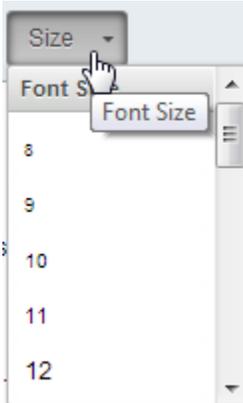
For the basic operations of cutting and copying content, and selecting all content, use your computer's standard keyboard shortcuts. For cutting and copying, you can also right-click to open a context menu from which you can choose those operations

This button	Does this
Paste 	Copies the clipboard content to the cursor location.
Paste as Plain Text 	<p>Copies the clipboard content to the cursor location as unformatted text.</p> <p>This is useful when copying text from a document created with a Microsoft application, where you don't want to carry over any of the Microsoft formatting.</p>
Paste from Word 	<p>Copies formatted Microsoft content from the clipboard to the cursor location.</p> <p>This is useful when copying text from a document created with a Microsoft application (not just Word), where you only want to carry over a minimal, clean set of HTML formatting code. Some formatting may be lost.</p>
Undo 	<p>Cancels your latest editing action.</p> <p>You may need to click several times to get back to where you want.</p>
Redo 	<p>Reinstates your latest editing action.</p> <p>You may need to click several times to get back to where you want.</p>

<p>Image</p> 	<p>Inserts an image that is located on the Internet by pointing to its location (URL). Specify the image and how you want it to look in the image properties form.</p> <p>After you insert the image, you can change its properties by right-clicking it and choosing Image Properties. Depending on your browser, you may also be able to drag the image's resizing handles to change its size.</p>  <p>If you decide you don't want the image after inserting it, you can click it and press Delete.</p>
<p>Table</p> 	<p>Inserts a table. Define your table in the table properties form.</p> <p>After you insert the table, you can change its properties by right-clicking it and choosing Table Properties. You can also use this menu to perform standard table operations like inserting rows and merging columns. Depending on your browser, you may also be able to drag the table's resizing handles to change its size.</p>
<p>Insert Horizontal Line</p> 	<p>Inserts a horizontal line.</p>
<p>Insert Image from File</p> 	<p>Inserts an image from a file that is on your computer. Browse for and select the file.</p> <p>After you insert the image, you can change its properties by right-clicking it and choosing Image Properties. Depending on your browser, you may also be able to drag the image's resizing handles to change its size.</p> <p>If you decide you don't want the image after inserting it, you can click it and press Delete.</p>
<p>Link</p> 	<p>Inserts a link. Define your link in the link form.</p>
<p>Unlink</p> 	<p>Removes the link from the selected content.</p>

Find 	Finds the text you specify, and optionally replaces it with new text. If you select text before clicking this button, it is prefilled in the find and replace form.
Maximize 	Fills the entire FirstClass browser tab with the object's content and edit toolbars. To return to normal view, click this button again.
Show Blocks 	Indicates separate block elements, such as paragraphs and tables. To return to normal view, click this button again.
Source 	<p>Shows your content with its behind-the-scenes HTML tags. To return to normal view, click this button again.</p> <div data-bbox="737 600 1377 1020" style="border: 1px solid #ccc; padding: 5px;"> <p>My New Position</p> <p>Blog title: My New Position</p> <p>Tags: Director Technology</p>  <pre> <h2>New Job Starting September</h2> <p>I am really excited about my new position of Director that I will be starting in September.</p> <p>Those of you who know me, will know that I am a &quot;pe d like to listen to, and weigh what others have to say.</p> <p>I am not afraid to make unpopular decisions however, as lo </pre> </div>
Signature 	Adds a signature that you have created in your preferences to the bottom of the body. Choose the signature you want.
Bold 	Makes the selected text bold.
Italic 	Makes the selected text italic.
Underline 	Underlines the selected text.
Strike Through 	Draws a line through the middle of the selected text, making it look like it's crossed out.
Remove Format 	Restores selected formatted text to the default.
Block Quote 	Indents and sets quotes around the selected paragraph.

<p>Insert/Remove Numbered List</p> 	<p>Makes the selected paragraph numbered.</p> <p>The first paragraph that you make numbered starts with 1. When you press Enter/Return at the end of this paragraph, the next paragraph starts with 2. To remove number formatting from a selected paragraph, click this button again. Any numbered paragraphs that follow will then start again at 1.</p>
<p>Insert/Remove Bulleted List</p> 	<p>Makes the selected paragraph bulleted.</p> <p>When you press Enter/Return at the end of this paragraph, the next paragraph is also bulleted. To remove bullet formatting for a selected paragraph, click this button again.</p>
<p>Decrease Indent</p> 	<p>Decreases the left margin of the selected paragraph.</p>
<p>Increase Indent</p> 	<p>Increases the left margin of the selected paragraph.</p>
<p>Text Color</p> 	<p>Applies the color you choose from the popup color palette to the selected text.</p> 
<p>Background Color</p> 	<p>Highlights text you have selected with the color you choose from the popup color palette.</p> 
<p>Align Left</p> 	<p>Aligns the selected paragraph with the left margin.</p>
<p>Center</p> 	<p>Centers the selected paragraph between the margins.</p>

<p>Align Right</p> 	<p>Aligns the selected paragraph with the right margin.</p>
<p>Justify</p> 	<p>Aligns the selected paragraph with both the left and right margins.</p>
<p>Format</p> 	<p>Applies a preset style, such as Heading 1, to the selected paragraph.</p> 
<p>Font</p> 	<p>Displays the selected text in the font you choose here.</p> 
<p>Size</p> 	<p>Displays the selected text in the size you choose here.</p> 

Synchronizing FirstClass with your mobile devices



Note

For FirstClass to support synchronization, your administrator must have installed FirstClass Synchronization Services. If you are unsure whether you can synchronize, check with your administrator.

You can access your FirstClass contacts and calendar items (events and tasks) with your mobile devices. To do this, your devices need to be able to synchronize with the FirstClass server, so that the content is the same whether you are using a web browser or a mobile. You can synchronize up to four mobile devices using SyncML or ActiveSync.

To specify how you want FirstClass to synchronize with your devices, choose **Preferences** from the desktop menu and update the **Handheld Devices** subtabs (one for each device). The first time you synchronize with a device, FirstClass automatically fills in the first unused subtab. You can configure your devices on these tabs even if you haven't yet synchronized. Just be sure that you synchronize your devices in the subtab order (synchronize the device configured on the first subtab first, and so on).

Field	Description
Active	This is selected automatically the first time the device is synchronized. You can remove active synchronization for this device by clearing this checkbox.
Wipe	If your device is lost or stolen, select this checkbox to remotely delete synchronized data from it.
Wipe status	The status of the wipe action.
Unique identifier	A code that identifies the device. This is filled in automatically the first time the device synchronizes.
Information	Information about your device that is filled in automatically the first time the device synchronizes.

Conflict resolution policy	<p>Choose what to do when an object has been changed on both the server and the device since the last synchronization.</p> <p>Keep FirstClass changes, discard device changes discards the change on the device and synchronizes the change from the server.</p> <p>Keep device changes, discard FirstClass changes discards the change on the server and synchronizes the change from the device.</p> <p>Duplicate changes on FirstClass and device synchronizes the changes from both devices. No change is discarded or overwritten. This results in multiple copies.</p>
Synchronize only after date	<p>Specify a date threshold for synchronization of calendar items. The default is the date on which the initial synchronization takes place. We recommend you advance this date from time to time to prevent unnecessary transfer of old data.</p> <p>To specify the date, click this field and update the popup calendar just as you would a popup calendar on a calendar item.</p>
Most recent synchronization	<p>The date of the last synchronization of your contacts and calendar items. Don't update these fields.</p>
Export attendees	<p>Select this checkbox to export attendees information from the server to your device along with the other event information. Attendees will be exported as they appear in the calendar event list on the server. Some devices can't correctly resolve FirstClass names as they appear in the Directory, and this may cause your synchronization to fail. ActiveSync will export and import only email addresses.</p>
Import attendees	<p>Select this checkbox to import attendees information from your device to the server along with the other event information. Attendees information imported from the device will be email addresses, not FirstClass names.</p>
Next synchronization	<p>Choose the level of synchronization you want the next time this device synchronizes.</p> <p>Slow sync (full) makes the device send all information to the server. The server compares it to what it has stored, and decides what needs to be added, deleted, or updated. This happens by default during the initial device synchronization, and when a previous synchronization has failed.</p> <p>Normal (changes) means only changes are sent to and from the server. This is the typical synchronization mode.</p>
Device can delete	<p>Select this checkbox to allow deletions on your device to be synchronized to the server.</p> <p>Warning: Some devices will send a "delete all" command if an object has been purged on the device. This means that if you've accidentally deleted your contacts or calendar on your device, this deletion will also occur on the server.</p>

Configuring FirstClass Unified Communications

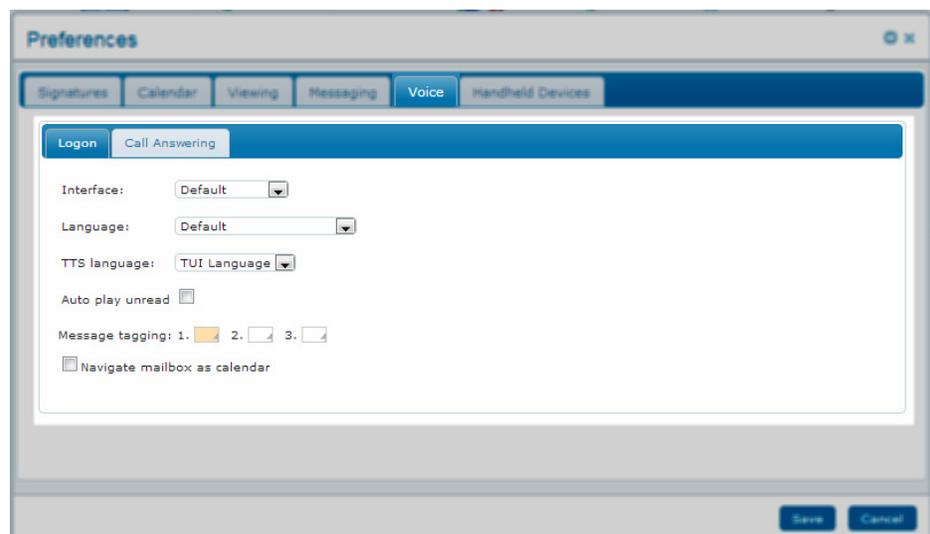


Note

FirstClass Unified Communications allows you to access text, voice, and fax messages in your mailbox. You can play voice messages and print faxes. For this to work, you must have a FirstClass mailbox, and your administrator must have installed FirstClass Unified Communications. If you are unsure whether your organization uses FirstClass Unified Communications, check with your administrator.

To specify how you want FirstClass Unified Communications to work, choose **Preferences** from the desktop menu and update the **Voice** subtabs.

The Logon tab



Field	Description
Interface	Default is what your administrator chose for you, and is the commonly used voicemail system in your organization. If you need to change this, choose your voicemail system.
Language	Default is what your administrator chose for you, and is the language most commonly used in your organization. If you need to change this because the majority of your correspondence is in another language, choose your preferred language.
TTS language	TUI Language is the default text-to-speech language chosen by your administrator, and is the language most commonly used in your organization. If you receive messages in various languages, choose Auto Detect . FirstClass will then examine each message and try to determine its language.
Auto play unread	When accessing messages by phone, the message will play automatically without you pressing a key to begin the playback.

Message tagging	You can tag messages by color for your convenience. When listening to voice messages by phone, you must press a number to assign a color. Choose a color here to correspond to each number, up to three numbers.
Navigate mailbox as calendar	Selecting this checkbox sorts all messages in your mailbox by date instead of the message number assigned when a message is left.

The Call Answering tab

Field	Description
Key and Transfer caller to	<p>Select a key and type a corresponding transfer to number to allow all callers to transfer to another number instead of leaving a message. You can have up to two transfer numbers. Be sure to type the full 10-digit number. Don't type 1 for long distance numbers. Don't type outside line access code numbers (such as 9 for an external local line).</p> <p>If callers tell you that they are being cut off when transferring, the system may be disconnecting too quickly, and the number isn't being properly processed. In this case, you can follow the number with a comma(,) for a one-second pause or a semicolon(;) for a five-second pause.</p> <p>If you enter a transfer number for key 0, this will override the system zero-out option (usually meaning dial 0 to reach reception).</p> <p>You may wish to list these options in your voice greetings so callers are aware of them. If you want to allow only certain callers to transfer, create this greeting just for them.</p>

Called no-message	<p>Specify what you want FirstClass to do when a caller hangs up without leaving a voice message.</p> <p>Never means you won't know about the call.</p> <p>Always makes FirstClass send you messages notifying you of all missed calls (Called, no message).</p> <p>Only valid caller IDs sends these notifications only for callers with valid caller IDs.</p>
Fax format	<p>Choose your preferred format for received faxes.</p> <p>Reject disables the receipt of faxes.</p> <p>JPG is a common, easily downloadable format, viewable on almost all platforms. Each page will be a separate attachment.</p> <p>PNG is similar in all ways to JPG, except PNG files are smaller than JPG files, and so more easily downloaded over slow or expensive connections.</p> <p>PCX is a legacy format. Each page will be a separate attachment.</p> <p>DCX is a legacy format. All pages are stored as one attachment.</p>
Voice format	<p>Choose your preferred format for received voice messages.</p> <p>MP3 is FirstClass' standard sound recording format. It is playable on almost all platforms.</p> <p>IMA ADPCM is better known as WAV. These files are slightly smaller than MP3 and are telephony quality.</p>
Embed fax	<p>Select this checkbox if you want faxes to be in the body of the message rather than attached.</p> <p>This option isn't available for DCX format faxes.</p>
On the phone	<p>Select this checkbox if you want callers to be notified when you are on the phone. This notification is made before your greeting plays.</p>

FirstClass terminology

Container

A conference, folder, community, or any other FirstClass object that contains items.

Directory

The location on the server where addresses for user accounts, conferences, public calendars, and other objects known to the server are stored.

Download

Save a copy of a file stored on the server to your own computer, or send stored files to your computer temporarily for viewing.

Envelope

The upper portion of an object such as a message, document, or calendar item. This portion contains information such as object name and subject. In the case of messages, it also contains addressing information.

Event

A time commitment, such as a meeting, that is recorded on a calendar.

Mail list

A list of message recipients. Sending a message to a mail list automatically sends it to all recipients in the list.

Permissions

Settings that determine the default behavior of a container. Permissions also control what users can do within the container.

Task

Something that you need to do, such as submitting a report, that is recorded on a calendar. The task may have a specified deadline.

Thread

A group of messages or community posts that were sent in reply to each other.

Upload

Copy a file to the server.