



# Open-Xchange Server Quick Guide -- BETA --

## Open-Xchange Server: Quick Guide

-- BETA --

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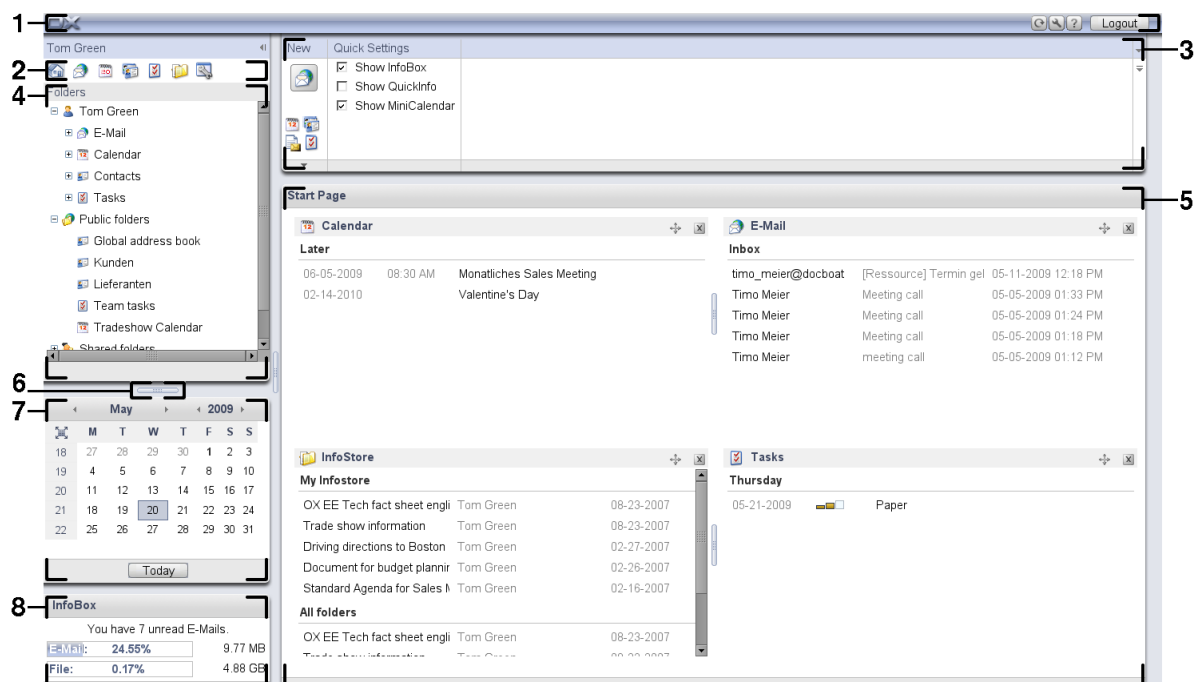
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# Chapter 1. The Start page

## 1.1. The interface of the start page

Directly after the login the start page is displayed.

### 1.1.1. Elements of the start page



The start page contains the following elements:

Nb	Element	Function
1	Title bar	The right side of the title bar contains buttons for refreshing, activating the settings, activating the online help, and logging out.
2	Module bar	Contains icons for opening the modules.
3	Panel	Contains the functions that are available on the start page.
4	Folder tree	Shows the folder structure of the groupware objects.
5	Overview window	Shows module windows with current objects. Each module window has an own title bar. The display in the overview window can be configured.
6	Window separator	Allows to change the start page division.
7	Mini calendar	Shows the current date. Enables you to access the calendar module.
8	InfoBox	Displays information about unread E-Mails and the used memory.

### 1.1.2. The title bar



The title bar contains the following elements:

Nb	Element	Function
1	<b>Refresh</b> icon	To newly retrieve the objects from the server click this button. Regardless of that, objects are automatically refreshed in frequent intervals. An animated icon on the button displays those processes.
2	<b>Configuration</b> icon	Opens the <b>Options</b> module.
3	<b>Help</b> icon	Opens the online help, the most recent error messages, and information about the groupware version number.
4	<b>Logout</b> button	To finish working with the groupware click this button.

### 1.1.3. The module bar



The module bar contains the following functions:

Nb	Icon	Function
1	Module icons	Switches to the respective module.
2	<b>Enhance</b> icon	Horizontally sorts the icons. Displays the module name.

### 1.1.4. The start page panel



The start page panel contains the following functions in different panel sections:

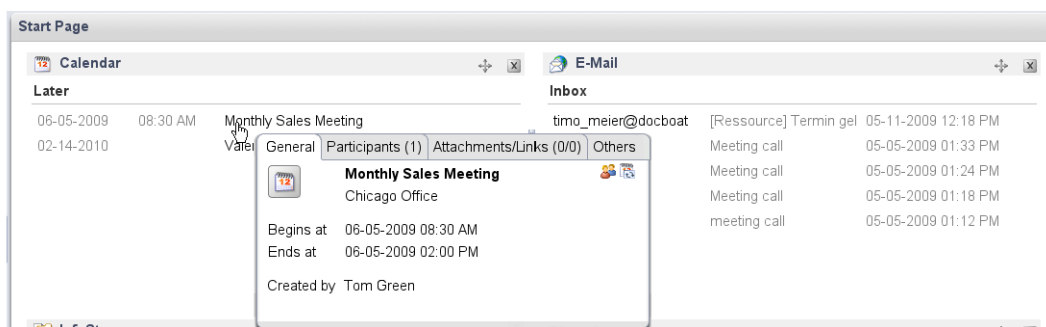
Nb	Panel section, icon	Function
1	<b>New</b>	Create new objects
2	<b>Quick settings</b>	Activate or deactivate the InfoBox, QuickInfos or the MiniCalendar
3	<b>Quick settings icon</b> ▾	Activate or deactivate the InfoBox, QuickInfos or the MiniCalendar
4	<b>Expand icon</b> ▾	Increase or decrease the panel height
5	<b>Further functions icon</b> ▾	Expand a menu with further functions.

### 1.1.5. The overview window

The overview window of the start page contains several module windows displaying different entries. The following module windows are displayed by default:

Module window	Functions
<b>E-Mail</b>	Shows the current unread E-Mails. The sender, subject, date and time of the receipt are shown.
<b>Calendar</b>	Displays your current appointments. Shows appointments taking place today, the next two days, next week or later. For each appointment the date, time and description is displayed.
<b>Tasks</b>	Displays your current tasks. Shows tasks taking place today, the next two days, next week or later. For each task the subject, date and priority is displayed.
<b>InfoStore</b>	Displays your current InfoStore items. Shows InfoStore items from your personal InfoStore folder, public InfoStore folders and from shared InfoStore folders of other users.

#### 1.1.5.1. Hovers



A hover shows detailed information about the object below the mouse pointer.

**How to display a start page object in the hover:**

1. Move the mouse pointer over an object in the overview window. After a short delay the hover opens. It displays the **General** tab.
2. To view further information click another tab.
3. To close the hover move the mouse pointer out of the hover.

## 1.2. Working with the start page

### 1.2.1. Creating new objects

On the start page you can create new objects like contacts, appointments, tasks, InfoStore items or send new E-Mails without having to switch to the respective module.

**How to create a new object:**

Click an icon in the **New** panel section. A window for entering the data of the new object opens.

Further information about creating objects can be found in the descriptions of the single modules.

### 1.2.2. Opening modules

Usually you will open the respective module when working with the groupware. There are some alternatives to do so.

**To open a module do one of the following actions:**



Click an icon in the **module bar** .

Click a folder in the **folder tree**.

In the **overview window** click the title of a module window.

To open the **Calendar** module click a day or calendar week in the **mini calendar**.

**How to switch back to the start page:**

Click the **Start page** icon  in the **module bar** .

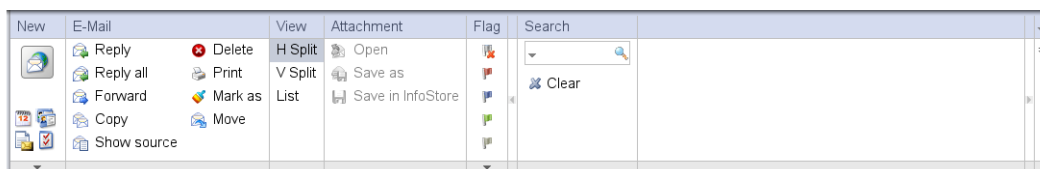


## Chapter 2. E-Mail module

### 2.1. The interface of the E-Mail module

To open the module click the **E-Mail** icon  in the module bar .

#### 2.1.1. The E-Mail panel

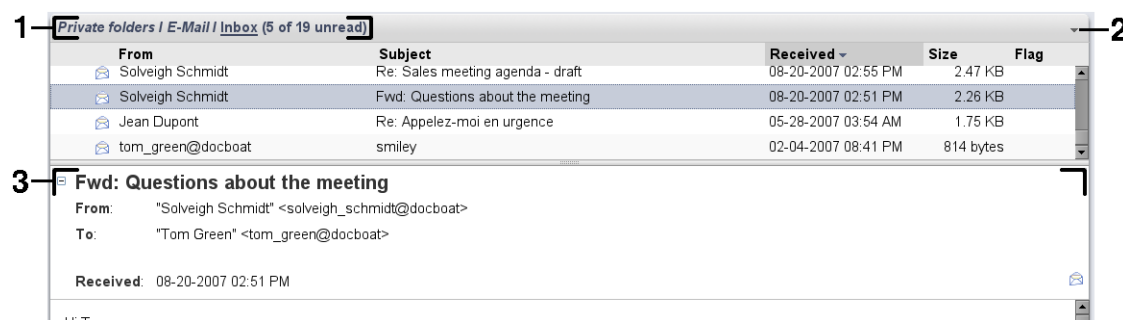


The E-Mail panel includes the following functions in different panel sections:


Panel section	Functions
<b>New</b>	Newly create E-Mail or other objects
<b>E-Mail</b>	Reply, forward, delete, print, manage E-Mails
<b>View</b>	Set the E-Mail view: H Split, V Split, List
<b>Attachment</b>	Open, save E-Mail attachments
	<b>Note:</b> You need to click an attachment to activate the functions of the panel section.
<b>Search</b>	Search E-Mails for sender, recipient, subject or E-Mail text

#### 2.1.2. The E-Mail overview window

The E-Mail overview window, **H Split** view:



The E-Mail overview window contains the following elements:

Nb	Element	Function
1	Label	Displays the name and path of the current E-Mail folder, the number of unread E-Mails, the number of all E-Mails in this folder <b>Tip:</b> You can browse the folder tree by clicking the underlined parts of the path.
2	<b>Options</b> button 	Opens the E-Mail settings.
3	Content area	Displays the E-Mails of the current E-Mail folder. Select the view in the respective <b>View</b> panel section.

## 2.2. Displaying E-Mails

The following views are available:

- The List view. It displays the E-Mails of an E-Mail folder in the form of a table. You can sort the table by clicking a column title.
- The H Split view. In the upper part of the overview window it displays the E-Mail list view and in the lower part it displays the content of the selected E-Mail.
- The V Split view. In the left part of the overview window it displays the E-Mail list view and in the right part it displays the content of the selected E-Mail.

### How to display E-Mails:

1. Select an E-Mail folder in the folder tree.
2. In the **View** panel section click **H Split**, **V Split** or **List**.
3. If you selected **H Split** or **V Split** select an E-Mail in the list view.

**Result:** The content of the E-Mail is displayed in different tabs.

## 2.3. Sending E-Mails

You have the following possibilities:

- Sending a new E-Mail
- Answering an E-Mail
- Forwarding an E-Mail

### 2.3.1. Sending a new E-Mail

#### How to send a new E-Mail:

1. In the **New** panel section click the **New E-Mail** icon. The **E-Mail** window opens.
2. Select one or more recipients.
3. Enter a subject.
4. Compose the E-Mail text.
5. Use further options if needed:
  - Add attachments.
  - Attach your vCard.
  - Enter a particular sender.
  - Set the priority.
  - Request a receipt notification.

Details can be found in the user guide and in the online help.

6. Click the **Send** icon in the panel. The window closes.

**Result:** The E-Mail is sent. A copy of the E-Mail is saved in the E-Mail folder **Sent E-Mails**.

**Tip:** You can also access the **New E-Mail** function in the **New** panel section in other modules. In the H Split or V Split view you can send a new E-Mail by clicking the sender in the E-Mail header.

### 2.3.1.1. Adding attachments

#### How to add attachments to an E-Mail in the E-Mail window:

1. In the **Attachments** panel section click **Add**. The **Select attachments** dialog window opens.
2. In the **Select attachments** dialog window click **Browse**. Select the file to be added as attachment. Close the file selection dialog window.
3. In the **Select attachments** dialog window click **Add**. The file is entered in the list field.
4. To add further attachments repeat steps 2 - 3.
5. To remove an attachment select it in the list field. Then click **Remove**.
6. In the **Select attachments** dialog window click **OK**.

**Result:** The file names of the attachments are displayed below the E-Mail text.

## 2.3.2. Replying to E-Mails

### How to reply to an E-Mail:

1. Select an E-Mail in the H Split, V Split or List view.
2. In the **E-Mail** panel section click **Reply**. To also reply to the recipients in CC click **Reply all**. The **E-Mail** window opens.
3. Enter the E-Mail text.
4. Click the **Send** icon in the panel. The window is closed.

**Result:** The E-Mail is sent. A copy of the E-Mail is saved to the E-Mail folder **Sent E-Mails**.

**Tip:** You can also use the context menu to reply to an E-Mail.

## 2.3.3. Forwarding E-Mails

### How to forward an E-Mail:

1. Select an E-Mail in the H Split, V Split or List view.
2. In the **E-Mail** panel section click **Forward**. The **E-Mail** window opens.
3. Select one or more recipients.
4. Enter the E-Mail text.
5. Click the **Send** icon in the panel. The window is closed.

**Result:** The E-Mail is sent. A copy of the E-Mail is saved to the E-Mail folder Sent E-Mails.

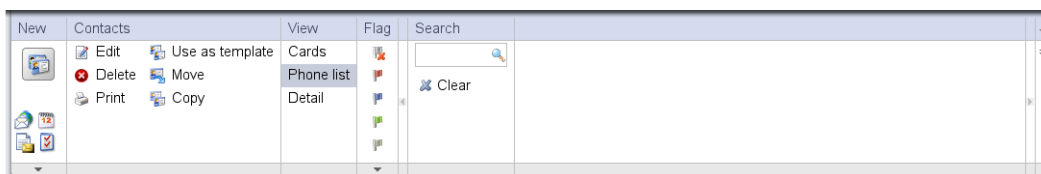
**Tip:** You can also use the context menu for forwarding an E-Mail.

## Chapter 3. Contacts module

### 3.1. The interface of the Contacts module

To open the module click the **Contacts** icon in the module bar .

#### 3.1.1. The Contacts panel

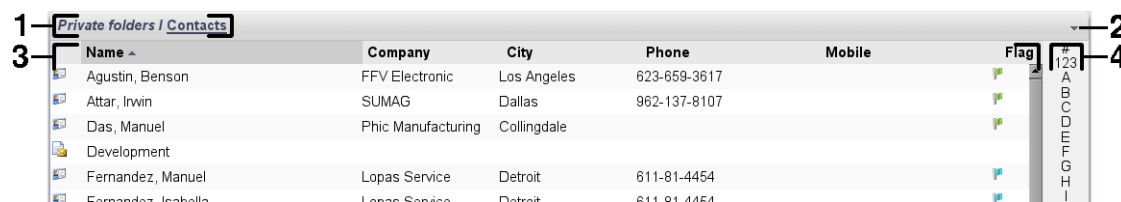


The Contacts panel contains the following functions in several panel sections:

Panel section	Functions
<b>New</b>	Newly create contacts or other objects
<b>Contacts</b>	Edit, delete, print, manage contacts
<b>View</b>	Set the display of contacts: address cards, phone list, detail
<b>Flag</b>	Mark contacts with flags
<b>Search</b>	Search for contacts after the surname or first name

#### 3.1.2. The contacts overview window

The contacts overview window, **Phone list** view:



The contacts overview window contains the following elements:

Nb	Element	Function
1	Labeling	Displays the name and path of the current contacts folder. <b>Tip:</b> You can browse the folder tree by clicking the underlined parts of the path.
2	<b>Options</b> button	Opens the contacts settings.
3	Content area	Displays the contacts. With the <b>View</b> panel section and the quick filter bar you can set the view.
4	Quick filter bar	Allows to filter the displayed contacts via the first letter of the contacts' last names.

## 3.2. Viewing contacts

The following views are available:

- The phone list. The contacts are displayed in the form of a table. You can sort the table by clicking a column header.
- The address card view. The contacts of the current contact folder are displayed as address cards.
- The detail view. All information of the contact selected in the phone list or address card view are displayed.

### How to display contacts:

1. Select a contact folder in the folder tree.
2. In the **View** panel section click **Address cards** or **Phone list**.
3. Use the quick filter bar to filter the view.
4. To view all details of a contact do the following:
  - Select a contact.
  - In the **View** panel section click **Details**.

## 3.3. Creating contacts

### How to create a new contact:

1. In the **New** panel section click the **New contact** icon. The **Contact** window opens. The **Business** tab is opened.
2. If required select a contact folder by clicking the **Folder** button and selecting a contact folder in the pop-up window.
3. In the **Business** tab enter the business data of the contact.
4. Use further options if needed:

Add tags.

If required mark the contact as private.

**Note:** You can only mark a contact as private if you create the contact in a personal contact folder.

If wanted enter the private data of the contact in the **Private** tab. You can create an appointment series from the contact's date of birth. The serial reminds you of the birthday.

Add a picture.

In the **Additional** tab enter further data for the contact.

Add attachments.

Details can be found in the user guide and in the online help.

5. Click the **Save** icon in the panel. The window is closed.

**Result:** The contact is created.

## 3.4. Managing contacts

### 3.4.1. Searching for contacts


You can find contacts in the current contacts folder via a search term. The search term defines the character string to be searched for.

The following contacts data can be used as search term:

- First name
- Last name
- Display name
- E-Mail (business)
- E-Mail (private)
- E-Mail (other)
- Tags

### How to search for a contact:

1. In the folder tree select a contact folder for the search.
2. Select the Address card or Phone list view.
3. In the **Search** panel section click the small arrow on the left side to select one of the search criteria.

**Note:** If the **Search** panel section is not displayed click the **Quick settings** icon  in the upper right part of the panel. Activate the search function in the pop-up menu.

4. Enter the search term in the input field.

5. Click the **Search** icon  in the **Search** panel section.

**Result:** The overview window only displays the contacts matching the search term.

**How to display all contacts of the current contact folder:**

In the **Search** panel section click **Clear**.

### 3.4.2. Editing contacts

**How to edit a contact:**

1. Display a contact in the Detail view or select a contact in the Address card or Phone list view.
2. In the **Contacts** panel section click **Edit**. The **Contact** window opens.
3. Edit the data of the contact.
4. Click the **Save** icon in the panel. The window is closed.

**Result:** The contact is changed.

If you do not want to accept the changes click **Cancel** in the **Window** panel section.

**Tip:** In the Address card or Phone list view you can also edit contacts by using the context menu or by double-clicking the contact.

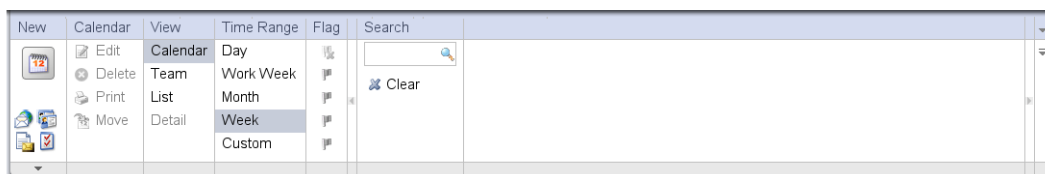


## Chapter 4. Calendar module

### 4.1. The interface of the calendar module

To open the module click the **Calendar** icon  in the module bar .

#### 4.1.1. The calendar panel

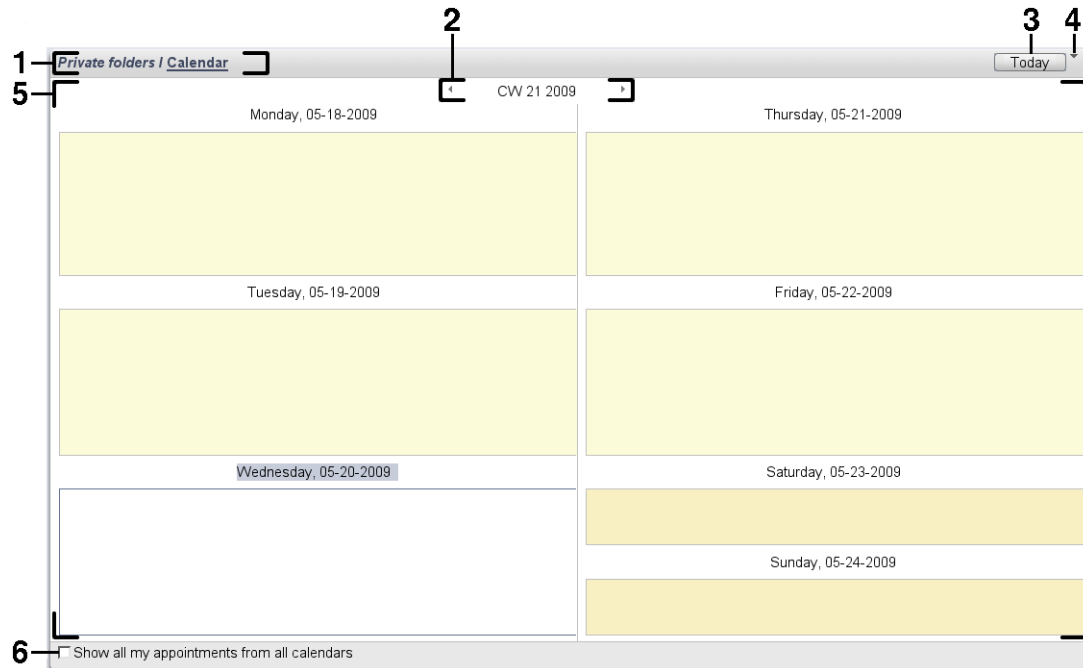


The calendar module contains the following functions in different panel sections:

Panel section	Functions
<b>New</b>	Newly create appointments or other objects
<b>Calendar</b>	Edit, delete, print, manage appointments
<b>View</b>	Set an appointment view: Calendar, Team, List
<b>Time range</b>	Set a time range for the calendar display: Day, Work week, Week, Month, Custom
<b>Flag</b>	Mark appointments with flags
<b>Search</b>	Search for appointments using the appointment description

### 4.1.2. The calendar overview window

The calendar overview window, **Calendar** view, **Week** time range:



The calendar overview window contains the following elements:

Nb	Element	Function
1	Labeling	Displays the name and the path of the current calendar folder. <b>Tip:</b> You can browse the folder tree by clicking the underlined parts of the path. <b>Note:</b> The labeling is not shown in the team view.
2	Date bar	Displays the date of the current time range. On both sides of the date there are navigation arrows that allow you to change the current time range.
3	<b>Today</b> button	Displays the time range containing the current date, in the overview window and in the mini calendar. The selected view, Calendar, Team or List remains in the overview window.
4	<b>Options</b> button ▾	Switches to the calendar settings.
5	Content area	Displays the calendar and the appointments. In the panel sections <b>View</b> and <b>Time range</b> you can choose what is being displayed.
6	<b>Show all my appointments from all calendars</b> checkbox	If this checkbox is activated all your appointments from all calendar folders are displayed. If this checkbox is deactivated only your appointments from the current calendar folder are displayed.

## 4.2. Viewing the calendar and appointments

The following views are available:

- The Calendar view. It displays a calendar sheet comprising a particular time range like Day, Week or Month. An appointment is displayed in the form of a rectangle.
- The Team view. It shows the appointments of users and groups and the resources booked for the single appointments. A user can create teams. They will remain after the logout.
- The List view. It shows the appointments of a time range in the form of a table.
- The Detail view. It shows all information of the appointment selected in the Calendar or List view.

### How to display a calendar and its appointments:

1. Select a calendar folder in the folder tree.
2. In the **View** panel section click **Calendar** or **List**.
3. In the **Time range** panel section select a time range.
4. To view all the details of an appointment do the following:
  - Select an appointment.
  - In the **View** panel section click **Details**.

## 4.3. Creating appointments

### How to create a new appointment:

1. In the **New** panel section click the **New appointment** icon. The **Appointment** window opens. The **Appointment** tab is opened.
2. If required select a calendar folder by clicking the **Folder** button and selecting a calendar folder in the pop-up window.
3. Enter a description, a location, and a comment for the appointment.
4. Select a start and end date for the appointment.
5. Set the appointment reminder.
6. Select the availability view: Booked, Tentative, Absent on business, Free.
7. If needed use further options:
  - Create an appointment series.
  - Add tags to the appointment.
  - If required mark the appointment as private.
  - Add further participants and resources to the appointment. Check whether the participants and resources are free for the appointment.
  - Add attachments to the appointment.

Details can be found in the user guide and in the online help.
8. Click the **Save** icon in the panel. The window is closed.

**Result:** The appointment is created.

## 4.4. Managing appointments

### 4.4.1. Editing appointments

#### How to edit an appointment:

1. Display an appointment in the Detail view or select an appointment in the List view or in a calendar view.
2. In the **Calendar** panel section click on **Edit**. The **Appointment** window opens.
3. Edit the appointment data. A comprehensive description can be found in 4.3: Creating appointments.
4. Click the **Save** icon in the panel. The window is closed.

**Result:** The appointment is modified.

### 4.4.2. Editing appointments with drag & drop

#### How to drag an appointment to another day:

1. Display an appointment in the calendar view Work week, Month, Week or Custom.
2. Move the mouse pointer over the rectangle displaying the appointment. The mouse pointer changes to a hand icon.
3. Drag the appointment to another day in the time range or to a day in the minicalendar.

**Result:** The appointment is moved to the selected day.

#### How to change the time of an appointment:

1. Display an appointment in the calendar view Day, Work week or Custom.
2. Move the mouse pointer over the rectangle displaying the appointment. The mouse pointer changes to a hand icon.
3. Drag the appointment to another time in the time range.

**Result:** The appointment is moved to the selected time.

#### How to change the start or end date of an appointment:

1. Display an appointment in the Work week or Custom calendar view.
2. Move the mouse pointer to the upper or lower border of the rectangle displaying the appointment. The mouse pointer changes to a double-arrow.
3. Drag the border up or down to another time in the time range.

**Result:** The start or end of the appointment is changed.

## Chapter 5. Tasks module

### 5.1. The interface of the tasks module

To open the module click the **Tasks** icon in the module bar .

#### 5.1.1. The tasks panel

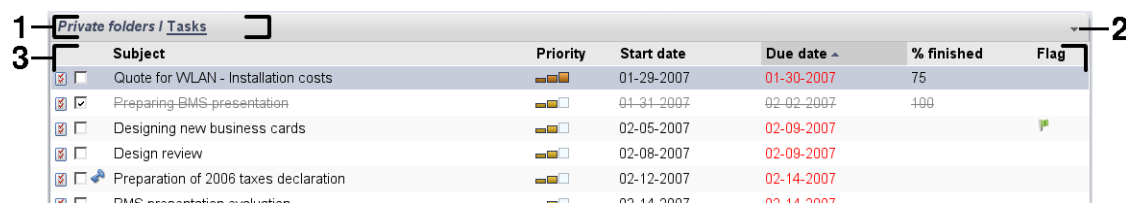


The tasks panel contains the following functions in different panel sections:

Panel section	Functions
<b>New</b>	Newly create tasks or other objects
<b>Task</b>	Edit, delete, print, manage tasks
<b>View</b>	Set the display of tasks: H Split, List
<b>Flag</b>	Mark tasks with flags
<b>Search</b>	Search for tasks by using the description

#### 5.1.2. The tasks overview window

The tasks overview window, **List** view:



The tasks overview window contains the following elements:

Nb	Element	Function
1	Labeling	Displays the name and path of the current tasks folder. <b>Tip:</b> You can browse the folder tree by clicking the underlined parts of the path.
2	<b>Options</b> button	Switches to the tasks settings.
3	Content area	Displays the tasks. In the <b>View</b> panel section you can select a view.

## 5.2. Viewing tasks

The following views are available:

- The H Split view. It displays the tasks list view in the upper part of the overview window and the details of the selected task in the lower part of the overview window.
- The List view. It displays the tasks in the form of a table.

### How to display tasks:

1. Select a tasks folder in the folder tree.
2. In the **View** panel section click **H Split** or **List**.
3. If you selected **H Split** select a task in the list view.

**Result:** The content of the selected task is displayed in different tabs.

## 5.3. Creating tasks

### How to create a new tasks:

1. Select a tasks folder in the folder tree. Otherwise the new task is saved in your personal standard tasks folder.
2. In the **New** panel section click the **New task** icon. The **Task** window opens. The **Task** tab is opened.
3. If requested select another tasks folder by clicking the **Folder** button and selecting a tasks folder in the pop-up window.
4. Enter a subject and notes for the task.
5. Set the priority of the task.
6. Set the due date and the task's start date.
7. Set the task reminder.
8. If requested use further options:
  - Mark the task as private.
  - Create a task series.
  - Add tags to the task.
  - Set the details for the task.
  - Add further participants to the task.
  - Add attachments to the task.

Details can be found in the user guide and in the online help.

9. Click the **Save** icon in the panel. The window is closed.

**Result:** The task is created. The editing status is set to **Not started** or **0 % finished**.

The **New task** function can also be invoked in other modules in the **New** panel section.

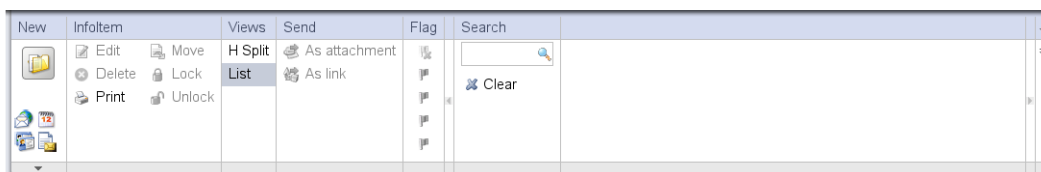
In the H Split or List view double-click a free area. The **Task** window opens.

## Chapter 6. InfoStore module

### 6.1. The interface of the InfoStore module

To open the module click the **InfoStore** icon in the module bar

#### 6.1.1. The InfoStore panel



The InfoStore panel contains the following functions in different panel sections:

Panel section	Functions
<b>New</b>	Newly create InfoStore entries or other objects
<b>Info entry</b>	Edit, delete, print, manage InfoStore entries
<b>View</b>	Set the display of InfoStore entries: H Split, List
<b>Send</b>	Send InfoStore entries per E-Mail
<b>Flag</b>	Mark InfoStore entries with flags
<b>Search</b>	Search for InfoStore items using the description

#### 6.1.2. The InfoStore overview window

The InfoStore overview window, **List** view:



The InfoStore overview window contains the following elements:

Nb	Element	Function
1	Labeling	Displays the name and path of the current InfoStore folder. <b>Tip:</b> You can browse the folder tree by clicking the underlined parts of the path.
2	<b>Options</b> button	Switches to the InfoStore settings.
3	Content area	Shows the InfoStore entries. You can set the display in the <b>View</b> panel section.

## 6.2. Viewing InfoStore items

The following views are available:

- The H Split view. It displays the List view of the InfoStore items in the upper part of the overview window and all details of the selected InfoStore item in the lower part of the overview window.
- The List view. It displays the InfoStore items in the form of a table.

### How to display InfoStore items:

1. Select an InfoStore folder in the folder tree.
2. In the **View** panel section click **H Split** or **List**.
3. If you selected **H Split** select an InfoStore item in the list view.  
**Result:** The content of the selected InfoStore item is displayed in different tabs.

## 6.3. Creating an InfoStore item

### How to create a new InfoStore item:

1. Select an InfoStore folder in the folder tree. Otherwise the new InfoStore item is saved in your personal standard InfoStore folder.
2. In the **New** panel section click the **New InfoStore item** icon. The **InfoStore item** window opens.
3. If requested select another InfoStore folder by clicking the **Folder** button and selecting an InfoStore folder in the pop-up window.
4. Enter a title in the **Title** field.
5. Depending on your needs use the following options.
  - Add a bookmark for a website by entering an Internet address in the **Link/URL** field. **Tip:** Copy the Internet address from the browser's address bar to the field.
  - Add a document.
  - Add tags.
  - Add comments.
6. Click the **Save** icon in the panel. The window is closed.

**Result:** The InfoStore item is created.

You can also activate the **New InfoStore item** function in other modules in the **New** panel section. In the H Split or List view double-click a free area. The **InfoStore item** window opens.



### 6.3.1. Adding a document

**How to add a document to the InfoStore item in the InfoStore item window:**

1. Click the **File** button.
2. Click the **Browse** button.
3. Select the file to be added as attachment. Close the file selection dialog window.
4. Click the **Save** icon in the panel. The **Version comment** window opens.
5. If wanted enter a comment in the **Version comment** window. Click **OK**. If you do not want to enter a comment click **No comment**.

**Result:** The document is uploaded to the server. As soon as the upload is finished the **InfoStore item** window is closed.



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