Groupware

Compact Guide

Groupware: Compact Guide

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1 About This Documentation

1.1 Who is the Target Group for this Documentation?

This documentation is addressed to the end user.

1.2 Which Contents are Included in the Documentation?

This documentation describes working with a typical groupware installation and configuration. The installed version and the configuration of your groupware might differ from what is described here.

Note: This document describes some essential groupware functions. Comprehensive documentation can be found in the on-line help and in the user guide.

1.3 Design Elements

In favour of better legibility the text content of this guide is illustrated using the following design elements:

Buttons

Buttons or functions that can be clicked are highlighted in **bold**.

Example:

Click on **Compose new email**.

Label

Labels for user interface elements like the names of windows or input fields are highlighted in *italics*.

Example:

The *Compose new email* page is displayed.

Key labels

Key labels are displayed in square brackets "[ ]". If several keys must be pressed, the plus sign "+" is added between the individual key labels.

Example:

Use **[ctrl]+[c]** to copy the content to the clipboard.

Links

Links in the text appear in blue.

Example:

Information can be found in 5.2: Sending email messages (page 28).

Explanatory text

Text that describes several functions or options is written in list form.

Example:

The following options are available:

- Send new E-Mail messages
- Reply to E-Mail messages.
- Forward E-Mail messages.

Step by step instructions

Instructions are shown as a numbered list. If the instruction only consists of one step or several alternative steps, numbering is not required. Instructions are always introduced with wording indicating the target of the instructions. Usually, at the end of the instructions the result is mentioned.

Example:

How to reply to an E-Mail:

1. Select an email in the side bar.
2. Click on **Reply** in the display area next to the email header.
3. Enter the email text.
4. Click on **Send** in the command bar.

Result: The E-Mail is sent.

Tips for making the work much easier

Tips for making work easier refer to actions that are optional e.g.: alternatives to an instruction.

A tip is introduced with the word **Tip:**.

Example:

Tip: You can also add an attachment by dragging and dropping a document from a file browser or from the desktop to the email window.

Malfunction note

A malfunction note indicates actions that can not be executed in the current situation. A malfunction note helps to avoid handling errors.

A handling error is introduced with the word **Note:**.

Example:

Note: In order to add a signature, you need to have created one in the email settings.

Warning about loss of data or security risks

A data loss warning indicates an action that irrevocably deletes data as soon as the action is executed. A security risk warning indicates an action that possibly endangers the security of your data.

A warning is introduced with the word **Warning:**.

Example:

Warning: Permanently deleted E-Mail messages are irrevocably lost. Prior to permanently deleting E-Mail messages, make sure you no longer need the E-Mail messages.

2 Getting Started with the Groupware

2.1 Operating Instructions

The following techniques are required:

- Using the left mouse button for clicking on elements
- Using drag and drop
- multi-selection by pressing the <ctrl> key or the <cmd> key on Mac systems
- Working with several windows
- Opening, saving, and closing files
- Opening, closing, and selecting files in a folder tree

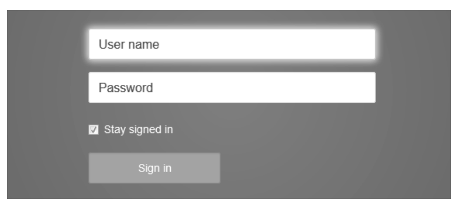
Information on these techniques can be found in your operating system documentation.

2.2 Signing in, Signing out

In order to sign in you need to know the server address, your username and your password. This information is provided by your administrator or hosting provider.

How to sign in to the server:

1. Open a web browser.
2. Enter the server address in the address bar. The login window will be displayed.



3. Enter your username and your password. Note that they are case-sensitive.
4. To save your credentials locally, enable **Stay signed in**.

   Warning: Only use this option if this machine is used solely by you. When signing in to a public machine do not use this option.
5. Click on **Sign in**.

   Note: If you enter the wrong username or password an error message is displayed. Enter the correct information.

How to sign out:

1. Click the **System menu** icon on the right side of the menu bar. Click on **Sign out**. The login window will be displayed.

   Depending on the groupware configuration, there is a **Sign out** icon .
2. If anyone else has access to the machine, close the browser.

Warning: If you close the web browser tab without signing out, you stay signed in to the server. If another person enters the server address, this person is automatically signed in with your username and has full access to your data.

Always sign out from the server when you are finished working.

Warning: Your credentials might stay in the system memory as long as your browser is open. This can be a security risk. Close the browser to remove your credentials from the system memory.

3 First Steps

3.1 The User Interface

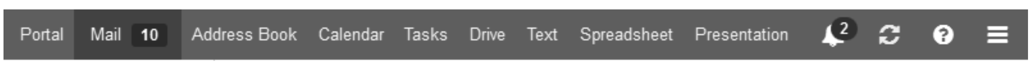
The user interface includes the following components:

- A menu bar on the top.

  Depending on the groupware configuration, there is a header bar above the menu bar. It displays the software title and your username.
- On the left side below the menu bar the search bar is displayed. It can be enabled or disabled together with the folder tree.
- The Folder tree can be activated on the left side.
- On the right side below the menu bar a tool bar is displayed. It contains app specific functions and functions for selecting the view in the display area.
- The remaining space is used for the display area.
- Depending on the action executed, the pop-up window or the notification area will overlap the display area.
- Text that can be clicked is displayed in blue.

The following screen shots show the user interface, using the *E-Mail* application as an example.

Menu bar



content

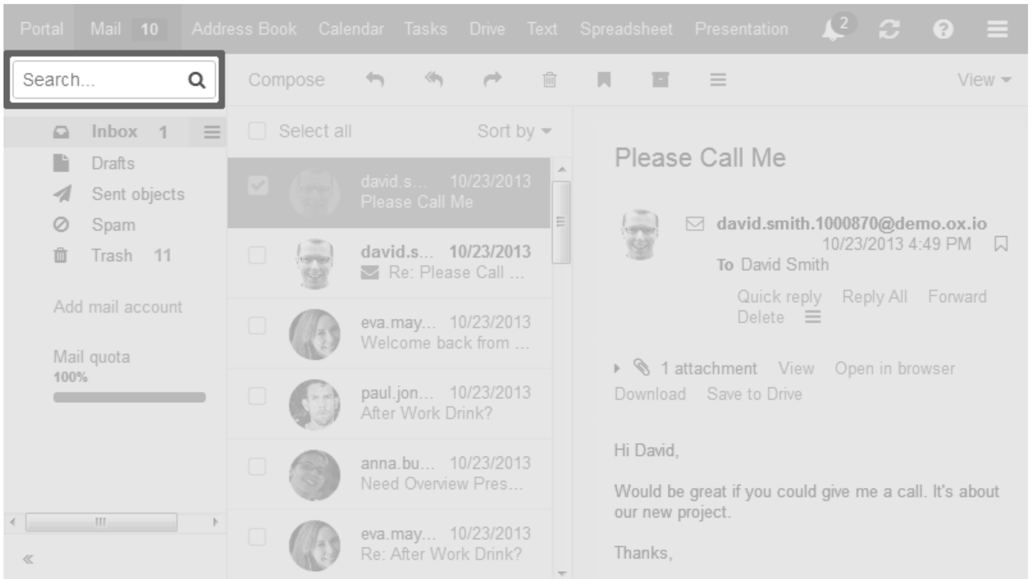
- Buttons for launching applications like *E-Mail* or *Calendar*

  Next to the **E-Mail** button, the number of unread E-Mail messages in your personal E-Mail folders are displayed.
- Depending on the action, additional buttons might be displayed e.g.,: if composing a new email or editing an appointment.
- **Unread Badge** icon . The icon notifies you of the number of new objects e.g., scheduled appointment invitations. If clicking the icon, the notification area opens.
- **Refresh** icon . Reloads objects from the server. Irrespective of this function, objects are refreshed in regular intervals.
- **Help** icon . Opens a context related help page. Depending on the current app, the respective help page from the online help is displayed. You can also open the online help from the system menu.

  Tip: Some dialogue windows also include the help icon. If clicking on it, the respective help for the dialogue window context is displayed.
- **System menu** icon . Opens a menu with the following entries:
  - *Settings*. Opens a page that allows customising settings.
  - *My contact data*. Opens a window where you can adjust your personal contact data in the global address book.
  - *Help*. Opens the online help.
  - *Sign out*. Signs you out from the groupware.

  Depending on the groupware's configuration, additional menu entries might be available.

Search bar



In order to display the search bar, click on **View** in the tool bar. Enable **Folder view**.

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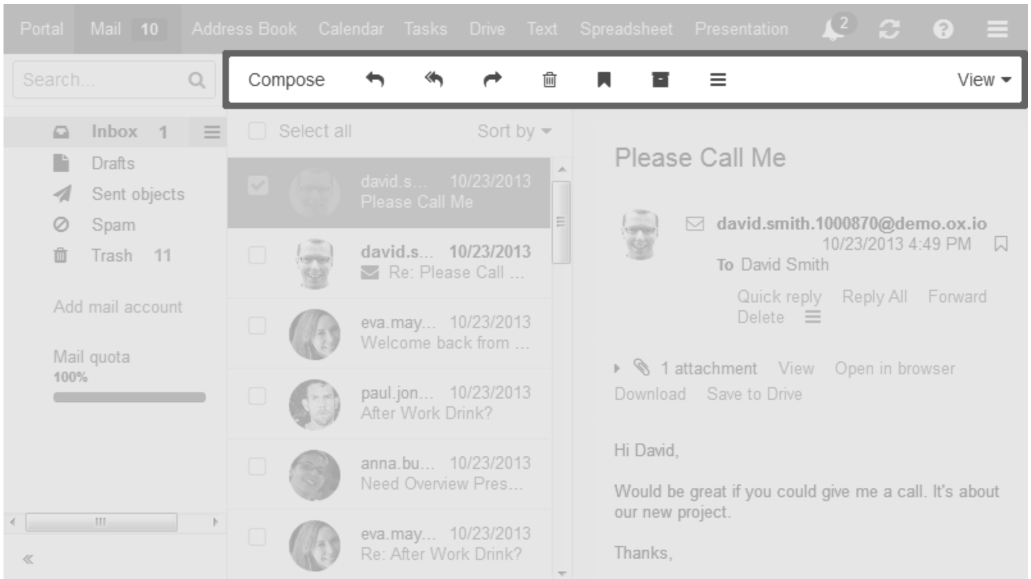
- Input field for the search term
- *Search* icon . Starts a search.
- Search menu. Depending on the app, it contains different search parameters.

The search result is displayed in the display area.

Tool bar



The tool bar is located below the menu bar.

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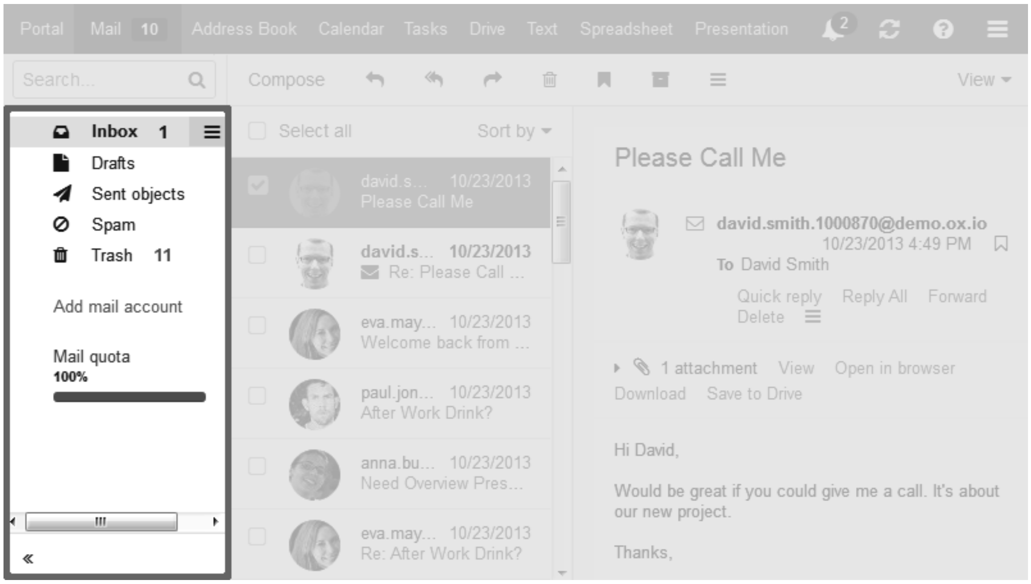
- Buttons for creating new objects, e.g. a new E-Mail or a new contact.
- Buttons or icons for editing objects.
- Depending on the app, additional app specific buttons or icons might be available.
- *Actions* icon ≡ . Contains app specific functions for organising objects.
- *View* button. Contains functions for controlling the layout in the display area and for opening or closing the folder tree.

Folder tree



To open or close the folder tree, use one of the following methods:

- Click on **View** in the tool bar. Enable or disable **Folder view**.
- On the bottom left side, click the **Open folder view** icon » or the **Close folder view** icon «.

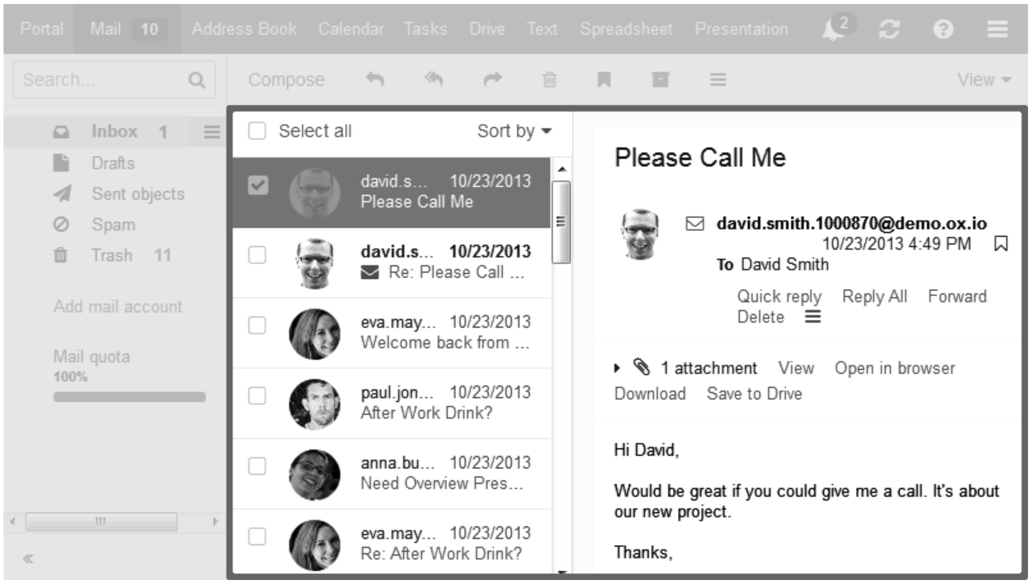
content

- the app specific folders
- depending on the application, sections for personal, public and shared folders

  Note: Depending on the groupware configuration, those sections might not be displayed if there are no public or shared folders.
- The **Folder-specific actions** icon ☰ next to the selected folder. It contains functions for organising folders. Depending on the folder, additional functions might be available.

  Tip: You can also access the folder-specific actions by right-clicking on a folder.
- Depending on the app, additional functions might be available.

Display area

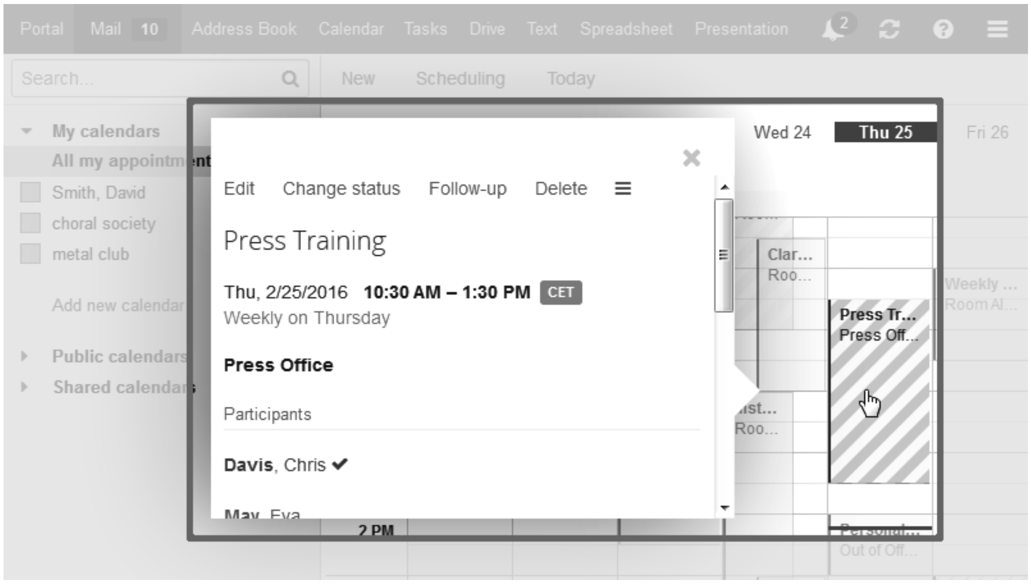


content

- A list of objects. On top of the list, control elements for selecting or sorting objects are displayed. The details of the object selected in the list, are displayed in a detail view.
- An icon view of objects. Clicking on an object opens a pop-up window. The object's details are displayed in the pop-up.

You can change the view in the display area by using the **View** button in the tool bar.

Pop-up

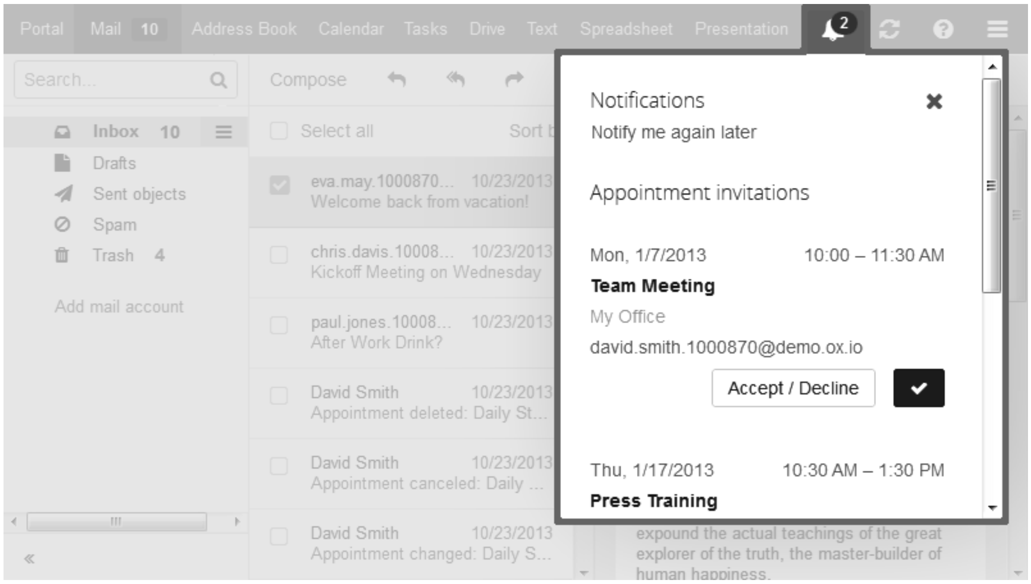


Shows an object's details. In order to open the pop-up, click on a groupware object in the display area. If you read an E-Mail in the display area and click on the name of the sender, the following elements are displayed in the pop-up:

- buttons for certain actions, e.g. copying the sender's contact data to a folder
- the sender's contact data
- relevant information, e.g. your shared appointments or your E-Mail conversation with the sender
- Information about this person from social networks. You can use the available buttons to open this person's profile.

Those person related data are called *halo view*. If clicking on certain objects in the pop-up, an additional pop-up opens. In order to close a pop-up, click the **Close** icon × on the upper right side.

Notification area



Displays information about the following objects:

- new appointment invitations
- reminders for queued appointments
- queued tasks
- tasks with a due date in the past

In order to open the notification area, click the **Unread badge** icon. If there are notifications, they will be displayed. You can do the following:

- To close the notification area without deleting the notifications, click the **Close** icon. You can also click the icon in the menu bar again.
- If you want to be reminded again later, click on **Notify me again later**.
- To accept or deny appointment invitations, click on the respective button next to the appointment. To mark tasks as done, click on the respective button.

3.2 Customising the Basic Settings

How to customise the basic settings:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Basic settings** in the side bar.
3. Change the settings [19].

The following settings are available.

- Language
- Timezone
- Refresh interval
- Theme
- High contrast theme
- Default app after sign in
- Automatic sign out
- Automatic opening of notification area
- Show desktop notifications
- **My contact data** button
- Change password

Note: Depending on the groupware's configuration, some settings might not be available.

Language

Defines the user interface language.

Timezone

Defines the time zone to which all time-bound entries refer.

Refresh interval

Defines the interval for retrieving new objects from the server.

Theme

Defines the colour scheme for the user interface.

High contrast theme

Defines whether a high contrast should be used for displaying the current theme.

Default app after sign in

Defines the application that is displayed after login.

Automatic sign out

Specifies whether you are automatically signed out if you have not worked with the groupware for a specific time.

Automatic opening of notification area

Specifies whether the notification are is automatically opened when receiving a new notification or email.

Show desktop notifications

Defines whether you will receive a desktop notification for new E-Mail messages.

My contact data button

In order to change your personal contact data in the global address book, click on this button.

Change password

In order to change your password, click on this button.

3.3 Changing Personal Contact Data

How to change your personal contact data:

1. Click the **System menu** icon on the right side of the menu bar. Click on **My contact data** in the menu.

   You can also click on **Settings** in the menu. Click on **Basic settings** in the side bar. Click on the **My contact data** button.

2. Change the data. Click on **Save**.

Tip: You can also change your personal contact data by using the *User data* widget in the *Portal* app.

3.4 Changing the Password

How to change your password:

Note: Depending on the groupware's configuration the procedure for changing the password might differ from these instructions. In this case, contact your administrator or host.

1. Click on **Portal** in the menu bar.
2. Click on **My password** in the *User data* widget.
3. Enter the current password. Enter the new password twice.
4. Click on **Change password**.

Note: This widget might not be displayed. If this is the case you can add the widget.

Tip: You can also change your password in the Basic settings.

3.5 Manually Downloading and Installing Clients and Apps

You can install the following clients or apps from within the groupware:

- Updater for MS Windows. The updater informs you about new client versions.
- Connector for Microsoft Outlook
- Notifier. Informs you about new E-Mail messages or appointments.
- Local Drive clients for MS Windows, MacOS, iOS, Android. The local Drive clients synchronize your *Drive* app data with your local workstation or mobile device.

Note: Depending on the groupware's configuration, some settings might not be available. In this case you can use a wizard to set up clients and apps.

How to install clients for workstations or mobile devices:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Downloads**.
3. In the display area, follow the instructions on downloading the clients.

   Comprehensive installation instructions can be found in the client- or app-specific user guides.

3.6 Using a Wizard to Set Up Clients and Apps

You can also access your E-Mail messages or groupware data by using suitable apps and clients on mobile devices and workstations. You can use a wizard in the groupware to install and configure those apps and clients. The wizard includes the following functions:

- Installing and configuring apps and clients on devices auch as PCs, tablets and smartphones. The supported devices are: Windows, Apple and Android.
- Installing the Connector for Microsoft Outlook and the Connector for Business Mobility.
- Installing the local Drive app for desktop and mobile devices. This app is downloaded and installed from the respective app store for the device. The local Drive clients synchronise your *Drive* app data with your local workstation or mobile device.
- Depending on the device, the configuration might also be possible by E-Mail or SMS. Advanced users can display the configuration data for a manual configuration.

Note: Depending on the groupware's configuration, the wizard might not be available. In this case you can manually install clients and apps.

How to use the wizard:

1. Click the **System menu** icon on the right side of the menu bar. Click on **Connect your device** in the menu. The wizard will be launched.
2. Select your system and the required devices. Follow the instructions.

4 Portal

How to launch the *Portal* app:

Click on **Portal** in the menu bar.

4.1 The *Portal* Components

The portal includes the following components.Depending on your groupware's configuration, the portal components can differ from the display described.

Signed in as

Displays the username that you used for signing in.

***Appointments* widget**

Displays your current appointments. You can do the following:

- If clicking on an appointment, a pop-up opens. The pop-up shows the appointment data.
- If clicking on a participant an additional pop-up opens.
- In order to close a pop-up, click on **Close** in the top right corner.

***Inbox* widget**

Displays new email messages. You can do the following:

- If clicking on an E-Mail, a pop-up opens. The pop-up displays the E-Mail's contents.
- To delete, reply to or forward the email, click on the respective button in the pop-up.
- To close a pop-up, click on **Close** in the top right corner.
- To compose a new email, click on the **Compose new email** list item.

***Tasks* widget**

Shows unfinished tasks. You can do the following:

- If clicking on a task, a pop-up opens. The pop-up shows the appointment data.
- In order to close a pop-up, click on **Close** in the top right corner.

***Recently changed files* widget**

Displays new or changed files.
Note: This widget might not be displayed. If this is the case you can add the widget.

***User data* widget**

Includes links for the following functions:

- Changing your personal contact data
- Changing your password

Note: This widget might not be displayed. If this is the case you can add the widget.

***Quota* widget**

Displays the current quota used on your account on the server.
Note: This widget might not be displayed. If this is the case you can add the widget.

***News* widgets**

Display current messages from different message sources:

- Messages from RSS feeds
- Photos from web pages like Flickr or Tumblr

To subscribe to a message source or an RSS feed, add a new widget to the Portal. The settings or a message source of an RSS feeds can be changed later.

4.2 Customising the Portal

4.2.1 Changing the widgets' order

You can define the order of the widgets.

How to change the order of the widgets:

1. Drag a widget to another position.
2. Drop the widget in the new position.

4.2.2 Removing Portal widgets

You can remove a widget from the portal by closing it.

How to remove a widget:

Click the **Close** icon × in the widget.
Use the Portal settings to display the widget again

4.2.3 Adding Portal widgets

You can extend the existing widgets by adding new ones.

How to add new widgets:

1. In the *Portal* app click on **Add widget** on the upper right side. Select an entry.
2. Some widgets require additional data. Enter the required values. Click on **Save**.

4.2.4 Changing the Portal widgets' settings

How to use the Portal widgets settings:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Portal** in the side bar.
3. Change the settings [25].

Tip: You can also display the portal widgets settings page by clicking on **Customise this page** in the *Portal* app.

The following settings are available.

- **Edit** button
- **Colour** button
- **Disable** button
- **Delete** icon
- **Reduce to widget summary** checkbox

Edit button

Allows editing a widget's settings, e.g. the URL or description.
Note: This button is only available for certain widgets.

Colour button

Defines the colour used for displaying a widget's name.

Disable button

Removes a widget from the Portal. To display the widget again, click on the **Enable** button.

Delete icon

Warning: If you delete a widget, all settings for this widget will be lost.
This icon deletes a widget from the portal and from the list of widgets on the settings page.

Reduce to widget summary checkbox

Defines whether the complete content of a widget is displayed on mobile devices or just an overview. This is e.g. valid for the widgets *Recently changed files*, *Appointments*, *Inbox*. In order to view the complete content of the widget, tap the overview text.
Note: You have to re-login in order for the new setting to be activated.

5 E-Mail

How to launch the *E-Mail* app:

Click on **E-Mail** in the menu bar.

5.1 Displaying email messages

By default, the content of the Inbox is displayed. Other E-Mail folders can be opened from within the folder tree. In the E-Mail settings, you can define whether a notification sound is to be played for incoming E-Mail messages.

How to display an email:

1. Open an email folder in the folder tree.

   When having selected the **Inbox** folder and if you are using categories, you can select a category.
2. In order to select a layout, click on **View** in the tool bar. Enable an entry below *Layout*.
3. To sort the E-Mail list, click on **Sort by** above the list. Enable an entry.

   Note: To reduce latency when loading the E-Mail list, only a certain percentage of the E-Mail messages in a folder will be loaded by the server if their number exceeds a defined limit. If browsing to the bottom of the list, the next part will be loaded.

   To combine all E-Mail messages of a conversation in a single list entry, enable the **Conversations** checkbox in **Sort by**.
4. Click an E-Mail in the list. The content of the E-Mail will be displayed in the detail view.
   - If the E-Mail is part of a conversation, all E-Mail messages in the conversation are displayed one below the other. To open or close an E-Mail that is part of a conversation, click on a free area between the sender and the date of receipt.

     To open or close all E-Mail messages in the conversation, click the **Open/close all messages** icon on the upper right side of the detail view.
   - If the E-Mail includes a quote from a previous E-Mail, you can display the quote by clicking the **Show quoted text** icon .
   - When having selected **Vertical**, **Compact** or **Horizontal** from the **View** drop-down in the tool bar, you can open an E-Mail in a separate window by double-clicking on the E-Mail in the list.
   - When having selected **List** from the **View** drop-down in the tool bar, the display area contains a list of all E-Mail messages in the folder. If clicking on an E-Mail, the E-Mail's detail view is displayed. The following functions are available above the detail view, :

     To open the list again, click on the **Back** button or icon .

     To display the next E-Mail, click the **View next** icon .

     To display the previous E-Mail, click the **View previous** icon .

   Note: Depending on the server configuration, the content of very large E-Mail messages might be displayed incompletely. In this case, you will receive an E-Mail with a link. In order to completely display the E-Mail, click on the link.

5.2 Sending email messages

5.2.1 Sending a new email

How to send a new email:

1. Click on **Compose** in the tool bar.
2. Enter the recipient's E-Mail address in the *To* field. Press Enter.

   If there are several recipients, repeat the action. Alternatively, you can enter the name of a distribution list [34].

   In order to delete a recipient, click the **Delete** icon ✖ .

   Tips:

   - While entering the E-Mail address, several matching suggestions are displayed. To accept a suggestion, use one of the following methods:
     - Use the scrol lbar to browse the list. Click on a suggestion.
     - Use the cursor keys to select a suggestion. Press Enter.
   - You can also select the recipients from a list of addresses by clicking on **To**.
   - You can define that the recipients can only see your E-Mail address, not your full name. To do so, proceed as follows:

     Click on the sender address next to *From:*.

     Enable **Hide names**.
3. Enter a subject.
4. Enter the email text.

   In order to compose the E-Mail in text format, select **Options**. Select *Plain text*.

   In order to compose the E-Mail in HTML format, select **Options**. Select **HTML**. A formatting bar appears. How to format the text:

   Select the text content.

   Click an element in the formatting bar.
5. If you use the HTML format, you can insert images into the text. To do so, proceed as follows:

   Place the cursor at the position where you want to insert images.

   Drag one image or several images from a file browser or the desktop to the E-Mail window. Drop the images in the E-Mail text input field.

   In order to remove an image from the text, select the image. Press the delete key on your keyboard.
6. In order to show additional options, click on **Options**. You can use the following options: set the priority, attach your vCard, request a delivery receipt
7. Click on **Send**.

How to select a recipient from a list of addresses on the *Compose* page:

1. Click on one of the buttons **To**, **CC** or **BCC** on the left side of the address input fields. The *Select contacts* window opens.
2. Select one or several contacts.

   You have the following options for finding a specific contact:

   - Enter a name in **Search**. While entering the recipients, matching suggestions are displayed. To accept a suggestion, click on it.
   - If multiple address books are available, you can select one.

   The selected contacts are displayed below the list. To undo the selection, click on **Clear selection**.
3. To accept the selected contacts in the input fields **To**, **CC** or **BCC**, click on **Select**.

5.2.2 Replying to E-Mail Messages

When replying to an E-Mail, some of the E-Mail's input fields are pre-filled:

- The sender of the email and additional recipients of the email are automatically entered as recipients of the reply email.
- The E-Mail subject is entered in the subject field of the reply E-Mail. The subject is preceded with the text "Re: ".
- The E-Mail text is entered in the forwarded E-Mail. Each cited line is marked at the beginning.

How to reply to an email:

1. Select an E-Mail.
2. Click the **Reply to sender** icon in the tool bar. To also reply to all other recipients click the **Reply to all recipients** icon .

   You can also use the **Reply all** button in the detail view.
3. Enter the E-Mail text. You can use additional functions e.g., E-Mail attachments.
4. Click on **Send**.

5.2.3 Forwarding email messages

If you forward an E-Mail, some of the E-Mail's input fields are pre-filled:

- The subject of the E-Mail is entered as the subject of the forwarded E-Mail. The subject is preceded with the text "Fwd: ".
- The email text is entered in the forwarded email. The text is preceded with the following details:
  - The header "Original message"
  - Sender, recipient, date, and subject of the original message

How to forward an email:

1. Select an E-Mail.
2. Click the **Forward** icon in the tool bar.
   You can also use the **Forward** button in the detail view.
3. Select one or more recipients. Information can be found in How to send a new email: (page 28).
4. Enter the E-Mail text. You can use additional functions e.g., E-Mail attachments.
5. Click on **Send**.

5.3 Organising E-Mail messages

5.3.1 Marking email messages as read or unread

Unread E-Mail messages are marked with the *Unread* icon . In order to mark an E-Mail as read or unread, you can do the following:

- marking individual E-Mail messages as read or unread
- mark all email messages in an email folder as unread

How to mark an E-Mail as unread or read:

1. Select an E-Mail.
2. Click the **Actions** icon in the tool bar. Click on **Mark as unread** in the menu. If the E-Mail is part of a conversation, all messages received for this conversation are marked as unread.

   You can also use the **Actions** icon or click the **Read** icon in the detail view. The icon changes to the **Unread** icon .
3. In order to mark this E-Mail as read, analogously do the same.

How to mark all email messages in a folder as read:

1. Select an email folder in the folder tree.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Mark all E-Mail messages as read**.

Also see

How to mark an E-Mail as unread or read: (p. 31)

5.3.2 Deleting E-Mail messages

How to delete email messages:

1. Select an E-Mail.
2. Click the **Delete** icon in the tool bar.

   You can also use the [Del] or [Backspace] key.

   You can also use the **Delete** button in the detail view.

How to delete all email messages in a folder:

1. In the folder tree, select the folder that contains the email messages that you want to delete.
2. Click the **Folder-specific actions** icon next to the folder name. Click on the **Delete all messages** button.

Result: The email is moved to the *Trash* folder.

Also see

How to recover deleted email messages: (p. 32)
How to delete email messages: (p. 31)
How to permanently delete an email from the Trash folder: (p. 32)
How to permanently delete the content of the Trash folder: (p. 32)

How to recover deleted email messages:

1. Select the *Trash* folder in the folder tree.
2. Select an E-Mail.
3. Click the **Actions** icon in the tool bar. Select **Move** from the menu.
4. Select a folder in the *Move* window. Click on the *Move* button.

Result: The email is moved to the selected folder.

Also see

How to delete email messages: (p. 31)
How to delete all email messages in a folder: (p. 31)
How to permanently delete an email from the Trash folder: (p. 32)
How to permanently delete the content of the Trash folder: (p. 32)

How to permanently delete an email from the Trash folder:

Warning: Permanently deleted email messages **cannot** be recovered. Before permanently deleting an email, make sure you no longer need the email.

1. Select the *Trash* folder in the folder tree.
2. Select an E-Mail.
3. Click the **Delete** icon in the tool bar.

Result: The email is permanently deleted.

Also see

How to recover deleted email messages: (p. 32)
How to delete email messages: (p. 31)
How to delete all email messages in a folder: (p. 31)
How to permanently delete the content of the Trash folder: (p. 32)

How to permanently delete the content of the Trash folder:

Warning: Permanently deleted email messages **cannot** be recovered. Before permanently deleting an email, make sure you no longer need the email.

1. Select the *Trash* folder in the folder tree.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Empty folder**.
3. Confirm that you want to empty the folder.

Result: The objects in the trash are permanently deleted.

Also see

How to recover deleted email messages: (p. 32)
How to delete email messages: (p. 31)
How to delete all email messages in a folder: (p. 31)
How to permanently delete an email from the Trash folder: (p. 32)

6 Address Book

How to launch the *Address Book* app:

Click on **Address Book** in the menu bar.

6.1 Displaying Contacts

How to display a contact:

1. Open an address book in the folder tree.
2. In order to display contacts with a certain initial letter, click a letter in the **navigation bar**.
3. Click on a contact in the list. The contact's data is displayed in the detail view.
   You can open the contact in a separate window by double-clicking on the contact in the list.
4. In order to display another contact, do one of the following:
   - Click on another contact in the list.
   - Use the cursor keys to browse the list.

6.2 The Halo View

The halo view opens a pop-up with all relevant information on a contact:

- Addresses, E-Mail addresses, phone numbers
- If the *Messenger* app is available in your groupware, the call history with this contact is displayed. If clicking on the **Show full history** button, the call history is displayed in the *Messenger* app.
- your current correspondence with this contact
- shared appointments with this contact
- Information about this person from social networks. You can use the available buttons to open this person's profile.

How to display a contact in the halo view:

1. Depending on the app, use one of the following methods:
   Select an E-Mail in the *E-Mail* app. Click on a recipient or the sender in the detail view.
   Select an appointment or a task in the *Calendar* or *Tasks* app. Click on a participant in the detail view or in the pop-up.
2. To close the halo view, click the **Close** icon × in the pop-up.

6.3 Adding Contacts

6.3.1 Creating a new contact

In order to create a new contact, you must enter at least one name in the *Add contact* window. All other data is optional.

How to create a new contact:

1. Open an address book in the folder tree.
   Note: Open an address book for which you have the appropriate permissions to create objects.
2. Click on **New** in the tool bar. Click on **Add contact**.
3. Enter the data.
4. To add attachments to the contact, click on **Add attachments** below *Attachments*. Select one or multiple files.
   In order to remove an attachment, click the **Delete** icon .
   Tip: You can also add an attachment by dragging and dropping a document from a file browser or from the desktop to the contact's window.
5. Click on **Save**.

6.3.2 Adding a contact from vCard

You can add a contact from a vCard attachment to an email. A vCard attachment by default has the name extension vcf.

How to add a contact from an E-Mail's vCard attachment:

1. Select an E-Mail with a vCard attachment in the *E-Mail* application.
2. Click on an attachment's name in the detail view. Click on **Add to address book** in the menu.

6.4 Creating distribution lists

A distribution list allows you to simultaneously send an E-Mail to multiple recipients by entering the distribution list in the E-Mail's recipients field. In order to create a new distribution list, enter a name in the *Create distribution list* page and add contacts.

How to create a new distribution list:

1. Open an address book in the folder tree.
   Note: Open an address book for which you have the appropriate permissions to create objects.
2. Click on **New** in the tool bar. Click on **Add distribution list**.
3. Enter a name for the distribution list in the **Name** field.
4. Enter a participant's E-Mail address in the *Participants* field.
   Tip: While entering the E-Mail address, several matching suggestions are displayed. To accept a suggestion, use one of the following methods:
   - Use the scroll bar to browse the list. Click on a suggestion.
   - Use the cursor keys to select a suggestion. Press Enter.

   In order to add additional contacts, repeat this step. In order to remove a contact, click next to the contact.
5. Click on **Create list**.

6.5 Organising Contacts

6.5.1 Sending Email Messages from within an address book

How to send an Email from within an address book:

1. Select a contact or a distribution list from the list.
2. Click on **Send e-mail** in the tool bar.
3. Fill in the details for sending a new E-Mail.

6.5.2 Inviting contacts to an appointment

How to invite contacts to an appointment:

1. Select a contact or a distribution list from the list.
2. Click on **Invite** in the tool bar.
3. Complete the details for creating an appointment.

6.5.3 Editing contacts

Contact data can be edited at a later point in time. The editing window shows the data that is most frequently used. Other data can be displayed.

How to edit a contact:

Prerequisite: You have the appropriate permissions to edit objects in the folder containing the contact.

1. Select a contact from the list.
2. Click on **Edit** in the tool bar. The contact's data is displayed.
3. Edit the data.
4. Click on **Save**.

6.5.4 Deleting Contacts

How to delete a contact:

Warning: If you delete a contact it will be irrevocably lost.

1. Select a contact from the list.
2. Click on **Delete** in the tool bar.
3. Confirm that you want to delete the contact.

Result: The contact is deleted.

7 Calendar

How to launch the *Calendar* app:

Click on **Calendar** in the menu bar.

7.1 Viewing Appointments

7.1.1 Displaying appointments in the calendar view

How to display appointments in the calendar view:

1. Click on **View** in the tool bar. Select one of the following entries: **Day**, **Work week**, **Week** or **Month**.
2. Open a calendar folder in the folder tree.
   In order to view all your appointments from all calendar folders, open the **All my appointments** folder.
3. Click on an appointment in the calendar sheet. The calendar's data is displayed in the pop-up.
4. In order to browse the calendar, use the navigation bar on top of the calendar sheet.
   In order to display the time frame with the current day, click on **Today** in the tool bar.
   Information on displaying appointments can be found in How are appointments displayed? (p. 37)

7.1.2 Displaying appointments in the list view

How to display an appointment in the list view:

1. Click on **View** in the tool bar. Select **List**.
2. Open a calendar folder in the folder tree.
   In order to view all your appointments from all calendar folders, open the **All my appointments** folder.
3. Click on an appointment in the list. The appointment's data is displayed in the detail view.
   You can open the appointment in a separate window by double-clicking on the contact in the list.
4. To display another appointment, use one of the following methods:
   - Click on another appointment in the list.
   - Use the cursor keys to browse the list.

7.1.3 How are appointments displayed?

In a calendar view, the appointment display is defined by the following details:

- The colour scheme set: classic colours, dark colours, custom colours
- Your availability displayed during the appointment duration: Booked, Tentative, Absent or Free
- Your appointment confirmation status: Accepted, Tentative, Declined
- Visibility of the appointment's subject and description: Private or visible for other users

The display is distinguished by the colours, icons and different shadings.

Display for the colour schemes Classic colours or Dark colours

Depending on the selected scheme, the appointments are displayed in the following colours:

- Tentative: yellow
- Free: green
- Booked: blue
- Absent: red

Depending on the appointment confirmation status, the appointments are displayed as follows:

- Accepted appointments are displayed in the colour of the availability
- Tentatively accepted appointments are marked with the text addition *Tentative*.
- Declined appointments are displayed in light grey with crossed subject.

  Tip: In the calendar settings, you can define whether declined appointments are displayed.

Private appointments are displayed in grey and are marked with the **Private** icon .

Also see

Display for the colour scheme Custom colour (p. 38)
Displaying appointments in the calendar view (p. 37)

Display for the colour scheme Custom colour

Depending on the selected scheme, the appointments are displayed in the following colours and patterns:

- Tentative: Selected colour with small diagonal stripes
- Free: Selected colour with broad diagonal stripes
- Booked: Selected colour
- Absent: Selected colour

  Tip: You can use a colour of your choice for *Absent*

If you do not select a colour, the default colour light blue is used. Depending on the appointment confirmation status, the appointments are displayed as follows:

- Accepted appointments are displayed in the colour and pattern of the availability
- Tentatively accepted appointments are displayed in light grey.
- Declined appointments are displayed in light grey with crossed subject.

  Tip: In the calendar settings, you can define whether declined appointments are displayed.

Private appointments are displayed in grey and are marked with the **Private** icon .

Also see

Display for the colour schemes Classic colours or Dark colours (p. 38)
Displaying appointments in the calendar view (p. 37)

7.2 Creating Appointments

7.2.1 Creating new appointments

How to create a new appointment:

1. Open a calendar folder in the folder tree.
2. Click on **New** in the tool bar.
3. Enter a subject. If required, enter the location and a description.

   If you want to create the appointment in another calendar folder, click on the folder name next to **Calendar** at the top. Select a calendar folder.
4. Define the appointment's start and end by using the date picker. For all day appointments, activate **All day**.

   In order to display the time in different timezones, click on the timezone button next to the time. You can set frequently used timezones as favourites in the calendar settings.
5. To get an appointment reminder, select a setting in **Reminder**.
6. You can use additional functions: create recurrence, add other participants or resources, set the availability, assign colours, add attachments.
7. Click on **Create**.

Tip: Alternatively, you can use one of the following methods:

Select one of the calendar views (*Day*, *Work week*, *Week* or *Month*). In order to display a specific time range, click on the date above the calendar sheet. In the calendar sheet double-click on a free area or drag open an area ranging from the beginning to the end of the new appointment.

In order to create an all day appointment, you have the following options:

Select one of the calendar views *Day*, *Work week*, *Week*. Double-click a free area above the calendar sheet.

Select one of the calendar views *Work week* or *Week*. Click on a day above the calendar sheet.

7.2.2 Scheduling appointments with several participants

When scheduling an appointment with several participants or resources, the Scheduling view shows free and busy time periods for the users and resources.

How to use the scheduling view for creating appointments:

1. You have the following possibilities for opening the scheduling view:
   - Click on **Scheduling** in the tool bar. The *Scheduling* page opens.
   - On the create or edit appointments page click on **Find a free time**. The *Scheduling* window opens.
2. Enter a participant's or resource's name in *Add participant/resource*. The appointments of the participant or resource are displayed in the calendar sheet.

   You can save the participants as a distribution list. To do so, select **Save as distribution list** below the list.
3. Search for a free time in the calendar. Use the following methods:
   - To set a time range, click on the date on the upper left side. You can also use the browse icons
   - Use the **Options** menu to adjust the view in the calendar sheet.
   - To adjust the visible part of the time range, use the scroll bar below the calendar sheet.
4. Define the appointment's start and end by using one of the following options:
   - In the calendar sheet drag open an area ranging from the beginning to the end of the new appointment.
   - To set the appointment's duration to one hour, click on the wanted time.

   Depending on how you opened the scheduling view, either click on **Create appointment** or on **Accept changes** to finish the process. The create or edit appointments page will be displayed.
5. Complete the details for creating or editing the appointment.

7.2.3 Resolving appointment conflicts

An appointment conflict happens if the following is true:

- You are the participant of an existing appointment. Your availability in *Display as* is set to one of these values: *Booked*, *Tentative* or *Absent*.
- You create a new appointment. Your availability in *Display as* is set to one of these values: *Booked*, *Tentative* or *Absent*. The new appointment is at the same time as an existing appointment.

As soon as you click on **Create**, the message *Conflict detected* is displayed. The appointments causing the conflict are displayed.

To resolve the conflict, use one of the following methods:

To create the appointment despite the conflict, click on **Ignore conflicts**.

To resolve the conflict, click on **Cancel**. Change the appointment's times or set **Display as** to **Free**.

7.3 Managing Appointments

7.3.1 Editing appointments

You can edit all data entered when having created an appointment at a later time.

How to edit an appointment:

Prerequisite: You have the appropriate permissions to modify objects in the folder containing the appointment.
Depending on the server configuration, you can only edit an appointment in your private calendars if you are the appointment's organiser.

1. Depending on the view selected, use one of the following methods:

   Click on an appointment in a calendar view. Click on **Edit** in the pop-up.

   Select an appointment in the list view. Click on **Edit** in the tool bar.

   The appointment data is displayed in a new page.
2. Edit the data.
3. Click on **Save**.

7.3.2 Editing appointments with drag and drop

In the calendar views you can use drag and drop to:

- move an appointment to another day
- change an appointment's time
- change an appointment's start or end

Prerequisite: You have the appropriate permissions to modify objects in the folder containing the appointment. Depending on the server configuration, you can only edit an appointment in your private calendars if you are the appointment's organiser.

How to move an appointment to another day:

1. Select one of the following views: **Work week**, **Week** or **Month**.
2. Select an appointment.
3. Drag the appointment to another day.

How to change an appointment's time:

1. Select one of the following views: **Day**, **Work week** or **Week**.
2. Select an appointment.
3. Drag the appointment to another time.

How to change the start or end of an appointment:

1. Select one of the following views: **Day**, **Work week** or **Week**.
2. Select an appointment's start or end.
3. Drag the start or end time to another time.

7.3.3 Deleting appointments

You can delete an individual appointment or multiple appointments at once.

How to delete an appointment:

Warning: If you delete an appointment it will be irrevocably lost.
Depending on the server configuration, you can only edit an appointment in your private calendars if you are the appointment's organiser.

1. Depending on the view selected, use one of the following methods:
   - Click on an appointment in a calendar view. In the pop-up, click on **Delete**.
   - Select an appointment in the list view. Click on **Delete** in the tool bar.
2. Confirm that you want to delete the appointment by clicking on **Delete**.

Result: The appointment will be deleted.

8 Tasks

How to launch the *Tasks* app:

Click on **Tasks** in the menu bar.

8.1 Viewing Tasks

How to display a task:

1. Open a tasks folder in the folder tree.
2. To sort the tasks list, click the **Sort** icon above the list. Select a sort criterion from the menu.
   To only display due tasks in the list, click the **Sort** icon above the list. Disable **Show done tasks** in the menu.
3. Click on a task in the list. The task's data is displayed in the detail view.
   You can open the task in a separate window by double-clicking on the contact in the list.
4. To display another task, use one of the following methods:
   - Click on another task in the list.
   - Use the cursor keys to browse the list.

8.2 Creating Tasks

How to create a new task:

1. Open a tasks folder in the folder tree.
   Note: Select a folder for which you have the permission to create tasks.
2. Click on **New** in the tool bar.
3. Enter a subject. Enter a description, if needed.
   To view the complete form, click on **Expand form**. The following optional functions are available.
   Set the task's start and due date.
   To get an appointment reminder, select a setting in **Reminder**. The respective date and time are entered in **Reminder date**.
   To use custom values, set them in **Reminder date**. In this case, **Manual input** will be pre-selected in the **Reminder** field.
   You can use additional functions: Creating recurring tasks, adding participants or groups, adding attachments, adding details.
4. Click on **Create**.

8.3 Managing Tasks

8.3.1 Editing tasks

You can edit a task's data at a later point.

How to edit a task:

Prerequisite: You have the permission to create objects in the folder containing the task.

1. Select a task from the list.
2. Click on **Edit** in the tool bar. The task's data are displayed.
3. Edit the data.
4. Click on **Save**.

8.3.2 Marking tasks as done

How to mark a task as done:

Prerequisite: You have the permission to create objects in the folder containing the task.

1. Select a task from the list.
2. Click on **Done** in the tool bar.
   The button label changes to **Undone**. Clicking on it marks the task as not done.

8.3.3 Changing a task's due date

You can change a task's due date and time.

How to change a task's due date:

Prerequisite: You have the permission to create objects in the folder containing the task.

1. Select a task from the list.
2. Click on **Due** in the tool bar. Select an entry.

8.3.4 Deleting tasks

How to delete a task:

Warning: When deleting a task, the task is irrevocably lost.

1. Select a task from the list.
2. Click on **Delete** in the tool bar.
3. Confirm that you want to delete the task.

Result: The task will be deleted.

9 Drive

How to launch the *Drive* app:

Click on **Drive** in the menu bar.

9.1 Viewing Files and Folders

By default, the content of the *My files* folder is displayed. Depending on a file's content, different functions are available:

- display [48] a file's content
- display attachments of E-Mail messages [49] sent or received by you
- hold [49] presentations in familiar Office formats or in the PDF format
- download [50] a folder's files or contents

9.1.1 Displaying a file's content

You can display various text files, documents or images in the viewer. You can play audio and video files, provided they are in a suitable format.

How to display a file's content:

1. Open a folder containing files.
2. In order to select a view for the objects, click on **View** in the tool bar. Select one of those entries: **List**, **Icons**, **Tiles**.

   In order to display details of a selected file, click on **View** in the tool bar. Enable **File Details**. If selecting multiple files by using the checkboxes, details about the last selected file are displayed.
3. To change the sorting, click on **Sort by** in the navigation bar. Enable an entry.

   In order to display specific object types only, click on **Select** in the navigation bar. Enable an entry below *Filter*.
4. Use one of the following options to open a file in the *Viewer*:
   - Double-click on a file in the display area.
   - Select one or several files in the display area. Click the **View** icon in the tool bar.

   If the side bar is not displayed, click the **View Details** icon to view details for the file selected.

   Depending on the file type, different functions can be available:
   - For text files and documents in the Office format, there are editing functions available: Information on editing documents can be found in the Documents user documentation.
   - For presentations, an icon for presenting the presentation is shown.
   - For audio and video files in suitable formats, there are playback functions available.

     Note: The playback options depend on the browser used.
5. In order to open the previous or next file, click the **Back** icon or the **Next** icon next to the view.

   In order to display the file in a new page, click the **Pop out** icon. For documents in the Office format, there are page navigation functions available:
   - In order to browse page by page or to view a specific page, use the elements above the document.
   - In order to navigate with the help of thumbnail images, activate the **Thumbnail** tab in the side bar. Click on a thumbnail image.

9.1.2 Displaying E-Mail attachments

The attachments of E-Mail messages that have been sent or received by you are displayed in a separate folder.

How to display E-Mail attachments:

1. Open the **My attachments** folder.
2. To view an attachment's content, use the methods for viewing files.
   To display the E-Mail that belongs to the selected attachment, click on **View** in the tool bar. Enable **File Details**. Click on **View message**.

9.1.3 Holding a presentation

You can hold presentations in common Office formats or in the PDF format. Depending on the requirement, use one of the following methods:

- Locally hold a presentation on the machine.
- Hold a remote presentation. This enables users who are not on-site, to follow the presentation.

How to locally hold a presentation:

1. Open a folder containing presentations.
2. Select a presentation in the display area. Click the **Present** icon in the tool bar.
   You can also use the **Present** icon in the *Viewer*.
   The presentation is opened in a new page. To browse the pages before the start, use the navigation elements next to the sheet or the previews below the sheet. You can also use the cursor keys.
   You can use the icons on the right side of the toolbar to adjust the sheet size.
3. In order to locally start the presentation, click on **Start presentation** in the tool bar. Select **Start local presentation**.
   During the presentation, the following functions are available.
   To display a function bar, hover the mouse over the bottom of the screen. The following functions are available:
   browse, display a specific sheet, display the participants list, pause presentation, activate fullscreen mode.
   If clicking on **Pause presentation**, the presentation is stopped at the current sheet.
   If clicking the icon **Toggle fullscreen**, the fullscreen mode is activated You can use the [esc] key or the function bar at the bottom of the screen to leave the fullscreen mode.
4. In order to end the presentation, click on **End presentation** in the tool bar.

How to hold a remote presentation:

1. Open a folder containing presentations.
2. Select a presentation in the display area. Click the **Present** icon in the tool bar.

   You can also use the **Present** icon in the *Viewer*.

   The presentation is opened in a new page. To browse the pages before the start, use the navigation elements next to the sheet or the previews below the sheet. You can also use the cursor keys.

   You can use the icons on the right side of the toolbar to adjust the sheet size.
3. Send the URL of the selected presentation to the users who should take part in the presentation. The users have to open the URL in their browser.

   If clicking the **Show participants** icon the users who are remotely taking part in the presentation are shown in the side bar.
4. Click on **Start presentation** in the tool bar. Select **Start remote presentation**.

   During the presentation, the following functions are available.

   To display a function bar, hover the mouse over the bottom of the screen. The following functions are available:
   browse, display a specific sheet, display the participants list, pause presentation, activate fullscreen mode.

   If clicking on **Pause presentation**, the presentation is stopped at the current sheet.

   If clicking the icon **Toggle fullscreen**, the fullscreen mode is activated You can use the [esc] key or the function bar at the bottom of the screen to leave the fullscreen mode.
5. In order to end the presentation, click on **End presentation** in the tool bar.

9.1.4 Downloading files or folder contents

The following options are available:

- Download one or several files.
- You can download the complete content of a folder as a zip archive.

How to download files:

1. Open a folder containing files.
2. Select one or several files in the display area. Click the **Download** icon in the tool bar.

   You can also use the **Download** button in the *Viewer*.
3. Complete the steps for downloading the file.

Tip: Learn how to download a certain file version by reading Section 9.3.6, “Working with versions”.

How to download the complete content of a folder:

1. Select the folder containing the content to be downloaded in the folder tree.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Download entire folder**.
3. Complete the steps for downloading the folder. The folder's content is saved as a zip archive.

9.2 Creating Files or Folders

You can add new files or create a new subfolder in the selected folder.

How to add new files:

1. Open a folder.
   Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click on **New** in the tool bar. Click on **Add local file**.
3. Select one or several files in the *Upload file* window.
   Click on **Open**. The display area shows the current progress status.
   In order to cancel the process, click on **Cancel** at the bottom right side of the display area.
   In order to cancel the process for single files, click on **File Details** at the bottom right side of the display area. Click on **Cancel** next to a file name in the *Upload progress* window.

Tips:

- You can continue working in the groupware during the upload process.
- You can also create a new file by dragging a file from a file browser or from your desktop to the *Drive* app window and dropping it in the display area.

How to create a new folder:

1. Open a folder.
   Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click on **New** in the tool bar. Click on **Add new folder**.
3. Enter a name in the *Add new folder* window. Click on **Add**.

9.3 Managing Files

9.3.1 Sending files as a link

You can send other users links to files. The link is inserted in the E-Mail text. If the user clicks on this link, the file is displayed on a new page.

How to send links to files:

1. Select one or several files in the display area. Click the **Actions** icon ≡ in the tool bar. Click on **Send as internal link** in the menu.
2. In the *Compose new E-Mail* page, complete the details for sending the E-Mail.

9.3.2 Sending files as Email attachments

You can send the current versions of files as E-Mail attachments.

How to send files as an E-Mail attachment:

1. Select one or several files in the display area. Click the **Actions** icon ≡ in the tool bar. Click on **Send by e-mail** in the menu.
   You can also use the **Actions** icon in the *Viewer*.
2. On the *Compose* page, complete the details for sending the E-Mail.

9.3.3 Editing file names

You can edit a file name.

How to edit the file name:

Prerequisite: You have the appropriate permissions for editing objects in the folder containing the file.

1. Select a file in the display area. Click the **Actions** icon in the tool bar. Click on **Rename** in the menu.
2. Edit the file name in the *Rename* window. Note the name extension. Click on **Rename**.

You can also use the **Actions** icon or you can click on the file name on the upper left side of the viewer.

9.3.4 Creating or editing descriptions

You can newly create or edit a file's description.

How to create or edit a file's description:

Prerequisite: You have the appropriate permissions for editing objects in the folder containing the file.

1. Select a file in the display area. If no details are displayed, click on **View** in the tool bar. Enable **File Details**.
2. In order to add a description, click on **Add a description**. In order to edit a description, double-click on the description.
   Enter a new text or change the existing one. Click on **Save**.

You can also use the function in the side bar of the *Viewer*.

9.3.5 Deleting files

You can delete one or several files. The following options exist:

- delete files. The files are moved to the *Trash* folder.
- Recover deleted files from the *Trash* folder.
- Permanently delete files from the *Trash* folder. You can also permanently delete all items in a folder by emptying the trash.

  Warning: A file deleted in the *Trash* folder cannot be recovered.

How to delete a file:

1. Select one or several files in the display area. Click the **Delete** icon in the tool bar.

   You can also use the **Actions** icon in the *Viewer*.
2. Confirm that you want to delete the selected files.

Result: The selected files are deleted.

How to recover deleted files:

1. Open the *Trash* folder.
2. Select one or several files.
3. Click the **Actions** icon in the tool bar. Select **Move** from the menu.
4. Select a folder in the *Move* window. Click on the **Move** button.

Result: The files are moved to the selected folder.

How to permanently delete a file:

Warning: Permanently deleted files **cannot** be recovered. Before permanently deleting a file, make sure you no longer need the file.

1. Open the *Trash* folder.
2. Select one or several files.
3. Click the **Delete** icon
4. Confirm that you want to delete the files.

Result: The files are permanently deleted.

How to permanently delete the content of the Trash folder:

Warning: Permanently deleted files **cannot** be recovered. Before permanently deleting a file, make sure you no longer need the file.

1. Select the *Trash* folder in the folder tree.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Empty folder**.
3. Confirm that you want to empty the folder.

Result: The objects in the trash are permanently deleted.

9.3.6 Working with versions

The following options are available for working with versions:

- opening or saving the current version
- uploading a new version
- opening or saving the current version
- setting a particular version as the current version
- deleting a certain version

How to open or save the current version:

1. Select a file in the display area. Click the **Download** icon in the tool bar.
2. Complete the steps for opening or downloading.

How to upload a new version:

1. Select a file in the display area. If no side bar is displayed, click on **View** in the tool bar. Enable **File Details**.
2. Click on **Upload new version** in the side bar. Select a file.
3. Enter a version comment.
4. Click on **Upload**.

You can also use the function in the side bar of the *Viewer*.

Tip: You can also upload a new version by dragging a file from a file browser or from the desktop to the viewer's or the display area's side bar and dropping it there.

How to open or save a certain version:

1. Select a file in the display area. If no side bar is displayed, click on **View** in the tool bar. Enable **File Details**.
2. Click the icon next to *Versions* in the side bar. The list of versions is displayed.
   Click on a version. Click the **Download** menu item.
3. Complete the steps for opening or downloading.

You can also use the function in the side bar of the *Viewer*.

How to set a certain file version as the current version:

1. Select a file in the display area. If no side bar is displayed, click on **View** in the tool bar. Enable **File Details**.
2. Click the icon next to *Versions* in the side bar. The list of versions is displayed.
   Click on a version. Click on the **Make this the current version** menu entry .

You can also use the function in the side bar of the *Viewer*.

How to delete a certain version:

1. Select a file in the display area. If no side bar is displayed, click on **View** in the tool bar. Enable **File Details**.
2. Click the icon next to *Versions* in the side bar. The list of versions is displayed.
3. Click on a version. Click on **Delete version** in the menu.

You can also use the function in the side bar of the *Viewer*.

10 Organising Data

10.1 Folders

10.1.1 Folder types

The following folder types exist in the folder tree:

- Personal folders
  - Personal folders contain your E-Mail messages, contacts, appointments, tasks, and files. Other users cannot view your personal folders, unless you share them with other users.
  - Your personal folders for contacts, appointments, tasks, and files can be found below *My address books*, *My calenders*, *My tasks*, *My files* in the respective app.
- Public folders
  - Public folders contain contacts, appointments, and documents that are of common interest to all users. Each user can create public folders and share them with other users.
  - The public folders for contacts, appointments, tasks, and files can be found below *Public address books*, *Public calenders*, *Public tasks*, *Public files* in the respective app.
- Shared folders
  - Shared folders have been shared with you by other users with read or write access.
  - The shared folders for contacts, appointments, tasks, and files can be found below *Shared address books*, *Shared calenders*, *Shared tasks*, *Shared files* in the respective app.

Note: If there are no public or shared folders, their folder type headers are not displayed.

10.1.2 Navigating within the folder structure

How to open or close the folder tree:

Use one of the following methods:

Click on **View** in the tool bar. Enable or disable **Folder view**.

Below the folder tree, click the **Open folder view** icon » or the **Close folder view** icon « .

In the *E-Mail* app, double-click a free area above the E-Mail list.

How to open or select a folder:

1. If the folder tree is closed, open it.
2. To view a folder's subfolders, click on the arrow next to the folder name.
3. Click on a folder. The folder's items are displayed in the detail view.

   Additionally have the following options in the *Drive* app.

   Click on an entry in the navigation bar to open a parent folder.

   To open a folder, double-click on it in the detail view.

10.1.3 Creating folders

You can create any number of subfolders in a personal folder. To create subfolders in a shared or public folder, you need to have the required permissions [60]. Depending on the app, there are different ways of creating folders.

How to create a new folder in the *E-Mail* or *Drive* app:

1. Select the folder in which you want to create the new subfolder in the folder tree.
   Note: Select a folder for which you have the permission to create subfolders.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Add new folder**.
3. Enter a name in the *Add new folder* window. Click on **Add**.

Tip: In the *Drive* app, you can also create a folder by clicking on **New** in the tool bar. Click on **Add new folder**.

How to create a new folder in the apps *Address Book*, *Calendar*, *Tasks*:

1. In the folder tree, click on **Add new folder**.
2. Enter a name in the *Add new folder* window. In case the new folder should be a public folder, enable **Add as public folder**. Click on **Add**.

10.1.4 Renaming folders

You can rename subfolders in your personal folders. For other folders you need the appropriate permissions [60].

How to rename a folder:

Note: In order to rename a folder, you need to have administrative rights for the folder.

1. In the folder tree select the folder that you want to rename.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Rename**.
3. Edit the name or enter a new name. Click on **Rename**.

10.1.5 Moving folders

You can move subfolders from your personal folders. For other folders you need the appropriate permissions [60].

How to move a folder:

Note: In order to move a folder, you need to have administrative rights for the folder and the right to create subfolders in the target folder.

1. In the folder tree, select the folder that you want to move.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Move**.
3. Select a folder in the *Move folder* window. Click on *Move*.

10.1.6 Deleting folders

You can delete subfolders in your personal folders. For other folders you need the appropriate permissions [60].

How to delete a folder:

Warning: If you delete a folder, all subfolders and objects in this folder will also be deleted. Deleted subfolders and objects cannot be restored.
Note: To delete a folder, you need to have administrative rights for this folder.

1. In the folder tree, select the folder that you want to delete.
2. Click the **Folder-specific actions** icon next to the folder name. Click the **Delete** button.
3. Confirm that you want to delete the folder.

Result: The folder and its objects are permanently deleted.

10.2 Permissions

Permissions define what an internal user or external partner is allowed to do with a particular folder and its contents.

- A description of the permissions can be found in 10.2.1: Which permissions can be granted? (page 60).
- A listing of preset permissions for specific folders can be found in in 10.2.2: Permissions for folders that already exist (page 61) and in 10.2.3: Permissions for new folders (page 61).

You can set permissions by sharing [62] E-Mail messages, address books, calendar, tasks, folders or files.

10.2.1 Which permissions can be granted?

In order to easily grant logical permission combinations, there are specific preset user roles:

- Administrator
- Viewer
- Reviewer
- Author

You can change the preset permissions by granting detailed permissions.

Administrator

A folder's administrator owns all permissions for that folder. The administrator can grant other users permissions to the folder.

- Folder permissions: create objects and subfolders
- Object permissions: read all objects, edit all objects, delete all objects

Viewer

A viewer can read all existing objects. A viewer has no other permissions.

- Folder permissions: view the folder
- Object permissions: read all objects

Reviewer

A reviewer can read and edit existing objects. The reviewer cannot create new objects though. The reviewer cannot delete objects.

- Folder permissions: view the folder
- Object permissions: read all objects, edit all objects

Author

An author is allowed to change or delete existing objects, to create and edit new objects, and to create subfolders.

- Folder permissions: create objects and subfolders
- Object permissions: read all objects, edit all objects, delete all objects

Detailed permissions

The preset permissions for the user roles can be refined. The following permissions can be granted.

- folders
  - view the folder
  - create objects
  - create objects and subfolders
- read permissions
  - none
  - read own objects
  - read all objects
- write permissions
  - none
  - edit own objects
  - edit all objects
- delete permissions
  - none
  - delete own objects
  - delete all objects

10.2.2 Permissions for folders that already exist

You have the following permissions for folders that already exist:

- You are the owner of your personal folders. The owner has the same permissions as an administrator.
- You are allowed to create folders and objects in public folders.
- You are allowed to view folders and read objects in the *Global Address book*.

10.2.3 Permissions for new folders

Depending on where you create a new folder, particular rights are assigned to you.

- in a personal folder [61]
- in a public folder [61]
- in a shared folder [61]

If you create a new folder in a personal folder:

- You are the owner.
- In the *E-Mail* app and the *Drive* app, other users inherit their permissions for the parent folder. In the other apps, other users do not inherit permissions.

If you create a new folder in the **Public files** folder:

- You are the owner.
- Other users will get no rights. You have to set the permissions for the new folder. If you then create new subfolders in this folder, the permissions for this folder are inherited by the new subfolders.

If you create a new folder in the shared folder of another user:

- The user who shared the folder is the administrator of the new folder.
- You are the author of the new folder.
- Other users will get the same rights as for the parent folder.

Note: You need to have permission to create objects in the shared folder.

10.3 Sharing

By sharing E-Mail messages, address books, calendars, tasks, folders or files with read or edit access, you can co-operate with internal users or external partners. There are the following limitations for sharing objects:

- In order to share data, you need to have administrator permissions for the respective folder.
- The global address book can not be shared.
- E-Mail messages can only be shared with internal users, not with external partners.
- Address books, calendars, and tasks can only by shared with external partners with read access, not with edit access.

The following options are available:

- You can create a public link to share data with read access. You can give this link to other people.
- You can invite internal users or external partners to a shared item to share data with specific people with read or edit access.
- You can access data shared by other users.
- You can manage your own shares by changing, adding or removing permissions.
- In the Drive app, you can view your shared files and folders in an overview page.

10.3.1 Sharing with public links

You can share data with read access by creating a public link. You can give this link to other people. Everyone who gets this link can view the data. The following options are available:

- You can share the following data with read access by using a public link: address books, calendars, tasks, folders. files.

  E-Mail messages cannot be shared with a public link.
- You can set a password for the access. You can define that the link expires after a specific time frame, e.g.: after one month.
- You can revoke the public link.

How to share data with read access by using a public link:

1. Select the app that should be used for sharing data.

   Select a folder in the folder tree.

   Note: Select a folder for which you have the permission to share. Depending on the app, some folders cannot be shared.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Get a link**.

   In the Drive app, you can also click the **Share** icon in the tool bar. Click on **Get a link**.

   The window for sharing objects will be opened. It contains a public link for a read access to the share.
3. Use the following methods:
   - To insert the link into other applications, click the **Copy to clipboard** icon next to the link.
   - In order to directly send the link by E-Mail, enter the respective E-Mail addresses. You can enter a message for the recipients.
   - By default, the data are shared with read access for an unlimited time. To set a time limit for the access to the shared data, enable **Expires in**. Select a time range.
   - To protect the access with a password, enable **Password required**. Enter a password. If you send the public link by E-Mail, the E-Mail contains the password.
4. Click on **Close**.

10.3.2 Inviting to a shared item

In order to share data with specific people with read or edit access, you can invite internal users or external partners to a shared item. The users will receive an E-Mail invitation. If an external partner accesses the share, the partner will automatically be logged in as a guest user. The following options are available:

- You can share E-Mail messages with internal users with read access.
- You can share address books, calendars and tasks with internal users with read or edit access, with external partners only with read access.
- You can share folders and files with internal users and external partners with read or edit access.

When sharing items, internal users or external partners are granted certain permissions for the shared data. Information on permissions can be found in 10.2: Permissions (page 60). Note the following:

- You cannot share your personal *Inbox* folder. In order to grant other users access to your E-Mail messages, share an E-Mail folder that is located below your *Inbox* folder. Other users have to subscribe to this E-Mail folder then.
- You have the exclusive administrator rights for your personal address book, calendar and task folders. You cannot grant administrator rights for these folders to other users.

How to invite internal users or external partners to a share:

1. Select the app that should be used for sharing data.

   Select a folder in the folder tree.

   Note: Select a folder for which you have the permission to share. Depending on the app, some folders cannot be shared.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Permissions / Invite people**.

   In the Drive app, you can also click the **Share** icon in the tool bar. Click on **Invite people**.

   The window for adjusting the permissions opens.
3. Enter an E-Mail address in *Add people*. The E-Mail address will be added to the list as an internal user, group or guest. Preset permissions are granted.

   If required, enter a message.
4. To edit the permissions for internal users, you have the following options.
   - To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.
   - To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu.
   - In order to remove a permission, click the **Action** icon next to the name. Click on **Revoke access**.
5. If you share a folder in the Drive app, you can transfer the folder's permissions to all existing or newly created subfolders of this folder. To do so, enable **Apply to all subfolders**.
6. If no E-Mail notifications about the shared item are to be sent, disable **Send notifications**.

   Note: The checkbox cannot be enabled when inviting external partners to a shared item.
7. Click on **Save**.

Similar actions

How to share data with read access by using a public link: (p. 63)
How to edit existing permissions: (p. 67)
How to resend an invitation to a person: (p. 67)

10.3.3 Accessing shared data

In the folder tree, you have access to data shared with you by other users.

How to access data shared by other users:

1. Open the shared folder in the folder tree. Depending on the app, you can find these folders below *Shared address books*, *Shared calendars*, *Shared tasks*, *Shared files*.

   If a user shared data with you, a folder named after the user will be displayed.

   Tip: To see the permissions that have been granted for the shared folder, click the **Folder-specific actions** icon . Click on **Permissions / Invite people**.
2. Open the folder to display its contents.
3. Select one or several objects. Use the function bar entries.

   Note: Depending on whether the objects are shared with read or edit rights, different functions can be available.

10.3.4 Managing own shares

In order to organise your own shares, you can do the following:

- edit the existing permissions:
  - adjust user role or permissions
  - add a new person
  - remove permissions for a person
- resend an invitation to a person
- remove all existing permissions for a file or a folder in the Drive app

Information on permissions can be found in 10.2: Permissions (page 60).

How to edit existing permissions:

1. In the folder tree, select a folder that you shared.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Permissions / Invite people**.
   You can also click the **Shared** icon next to the folder name.
   In the Drive app, you can also click the **Share** icon in the tool bar. Click on **Invite people**.
   The window for adjusting the permissions opens.
3. You have the following options for changing permissions.
   - To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.
   - To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu. **Notes:**
     You cannot change the administrative rights of a personal folder.
     Permissions cannot be changed for public links.
     Guests only get read permissions. You cannot change this permission.
   - In order to add new permissions, enter an E-Mail address in *Add people*. The E-Mail address will be added to the list as internal user, group or guest.
   - In order to remove a user's permissions, click the **Actions** icon next to the user's name. Click on **Revoke access** in the menu.
4. Click on **Save**.

How to resend an invitation to a person:

1. In the folder tree, select a folder that you shared.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Permissions / Invite people**.
   You can also click the **Shared** icon next to the folder name.
   In the Drive app, you can also click the **Share** icon in the tool bar. Click on **Invite people**.
   The window for adjusting the permissions opens.
3. Click the **Actions** icon next to a user name. Click on **Resend invitation** in the menu.
4. Click on **Save**.

How to remove all permissions for a file or a folder in the Drive app

1. In the Drive app, open **My shares** in the folder tree.
2. Select a share in the detail view. Click on **Revoke access** in the tool bar.

10.3.5 Viewing your own shares in the Drive app

To get an overview of your shared files and folders in the Drive app, you can display all your shares as a list. In addition, the following options are available:

- You can sort the list by different criteria.
- You can display the content of a share's parent folder.

How to view your shares in the Drive app:

1. In the Drive app, open **My shares** in the folder tree.

   The folders and files shared by you are displayed in the detail view. For each share a row with the following details is displayed.
   - An icon indicates the share's object type: file or folder.
   - The share's name and folder path. To open a folder, click on a path entry.
   - Three icons in different colours indicate whether an object has been shared with specific users.
     - The icon indicates whether the object has been shared with internal users.
     - The icon indicates whether the object has been shared with guest users.
     - The icon indicates whether the object has been shared by using a public link.
   - The share's creation date.
2. You can do the following:
   - To sort the shares list, click on **Sort by** above the list. Select an entry.
   - To display the content of a share's parent folder, click on a path entry in the list.

11 Questions and Answers

General questions

How can I change my password?

In order to change your password, click on **My password** in the *User data* widget in the *Portal* app. Learn more from these instructions.

Why can particular buttons or input fields not be found?

If certain buttons or input fields are not visible it can be due to the following reasons:

- A function is not available in the current context.
- To keep the user interface as clean as possible, rarely used control elements are not displayed. In this case, a button called **Actions** is displayed. To view all functions, click on this button.

How am I notified of new email messages or appointment invitations?

If there are new E-Mail messages or appointment notifications, the *Unread Badge* icon to the right side of the menu bar shows the number of new objects. Click the icon to open the *Notification Area*. It contains information about the new objects. From there you can also directly activate functions, e.g. read the new E-Mail or confirm the new appointment. Information can be found in The User Interface.

How can I read current messages from social networks or news pages?

In the *Portal* app you can read current messages from your social networks or from news pages or view photos of specific web pages by adding news widgets.

Questions about Email Messages and contacts

How can I send an email to multiple addresses at once?

To send an email to multiple recipients at once, you can choose from the following options:

- Enter all recipients in the input fields **To...**, **Copy to...** or **Blind copy to...**. Use the autocomplete function to more easily enter the addresses. This FAQ list provides an explanation of the differences between the input fields.
- If you regularly send E-Mail messages to the same group of people, create a distribution list in the *Address Book* app and add the E-Mail addresses to the distribution list. Information can be found in Creating distribution lists (page 34).

What is the purpose of the input fields Copy to... and Blind copy to...?

Recipients entered in the input fields **To...** or **Copy to...** can be viewed by all other recipients entered in the input fields **To...** or **Copy to...**. Recipients entered in the input field **Blind copy**

to... cannot be viewed by other recipients entered in the input fields **To...**, **Copy to...** or **Blind copy to...**. In practice, this means:

- If you send an email to a team and every recipient should be able to see who else receives the email, enter the recipients in the input fields **To...** or **Copy to...**
- If you send an email to recipients who should not see the names of the other recipients, enter the recipients in the input field **Blind copy to...**.

Questions about tasks, calendars, and appointments

When should I use a task and when should I use an appointment?

Whether it is best to use an appointment or a task can be determined based on the following criteria:

- An appointment takes place at a defined point in time. If you need to execute an action at a defined point in time, create an appointment for this action.
- A task has a due date and sometimes a priority. If you are flexible regarding the time schedule of an action and only have to respect the due date, enter a task for this action.

How can I organise another person's appointments as a representative?

Ask the other person to share a calendar folder with write permissions. Then enter this person's appointments in the shared folder. The other person will be displayed as the organiser of the appointments.

How do I use the availability function, e.g.: Free, Busy, Absent etc?

If you want to avoid conflicts when creating appointments, use the availability *Free*. All other availabilities cause conflict messages for overlapping appointments.

How do I use the calendar or tasks recurrence settings?

Example 1: An appointment or a task should take place every second day. It should start on 07-01-2013 and should take place five times.

Starts on 07-01-2013

Daily

The event is repeated every 2 days.

The series ends after 5 appointments or tasks.

Example 2: An appointment or a task should take place every Tuesday and Friday. It should start on 08-01-2013.

Starts on 08-01-2013

Weekly

The event is repeated every week on Tuesday and Friday.

The series never ends.

Example 3: An appointment or a task should take place every second Wednesday. It should start on 09-01-2013. The last appointment should be on 27-03-2013.

Starts on 09-01-2013

Weekly

The event is repeated every 2 weeks on Wednesday.

The series ends on 27-03-2013.

Example 4: An appointment or a task should take place on the first Monday of a month. It should start on 04-02-2013. The event should take place twelve times.

Starts on 04-02-2013

Monthly

The event is repeated on the first Monday of each month.

The series ends after 12 appointments.

Example 5: An appointment or a task should take place each year on the last Friday in November. It should start on 29-11-2013.

Starts on 29-11-2013

Yearly

The event is repeated every last Friday in November.

The series never ends.

Questions about data organisation and team work

I want to share a folder with other users. Which permissions do I have to set?

Example 1: A user should be allowed to see the objects in a folder, but should not be allowed to modify or delete them. The user should not be allowed to create new objects. Settings

- Folder permissions: view the folder
- Object permissions: read all objects, no edit permissions, no delete permissions
- Administrative rights: No

Example 2: A user should be allowed to see the objects in a folder, but should not be allowed to modify or delete them. The user should be allowed to create and edit objects.

- Folder permissions: view the folder
- Object permissions: read all objects, no edit permissions, no delete permissions
- Administrative rights: No

Example 3: A user should not be allowed to see the objects in a folder. The user should be allowed to create and edit objects.

- Folder permissions: create objects
- Object permissions: read own objects, edit own objects, delete own objects
- Administrative rights: No

Example 4: A user should be allowed to see and edit all objects. The user should be allowed to create and edit subfolders and own objects.

- Folder permissions: create objects and subfolders
- Object permissions: read all objects, edit all objects, delete all objects
- Administrative rights: No

Example 5: A user should have all permissions. The user should be allowed to grant permissions to other users.

- Folder permissions: create objects and subfolders
- Object permissions: read all objects, edit all objects, delete all objects
- Administrative rights: Yes

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