



**Groupware**  
**Compact Guide**



## Groupware: Compact Guide

Publication date Thursday, January 21, 2021 Version 7.10.5

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# **1 About this Documentation**

## **1.1 Target Groups, Contents**

This documentation is addressed to the end user.

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

---

## 2 First Steps

### 2.1 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 host.

#### 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.

If you set up two-factor authentication, an additional page is displayed. Enter the authentication data on this page.

#### How to sign out:

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

## 2.2 General Description of the User Interface

### 2.2.1 The menu bar

Note: The following is a schematic representation.



Content

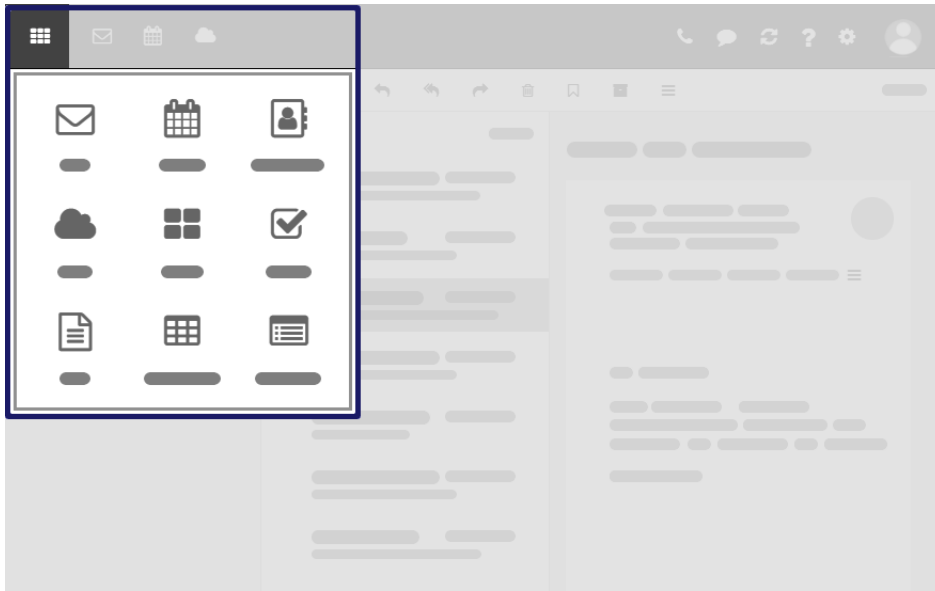
- **All Applications** icon . Opens a menu with icons for launching an app.
- Depending on the configuration: Quick launch icons for launching frequently used apps. The context menu allows to define the apps that should be displayed as quick launch icons.
- **Notifications** icon . The icon is displayed when receiving a new notification. The icon notifies you of the number of new notifications e.g., new appointment invitations. If clicking the icon, the notification area opens.
- Depending on the configuration: **Call history** icon . Opens the call history that shows all calls or missed calls. If clicking on an entry, the window for calling this contact will be opened.
- Depending on the configuration: **Chat** icon . Opens or closes the Chat window. This window can either be floating or pinned to the right side.
- **Refresh** icon . Reloads objects from the server. Irrespective of this function, objects are refreshed in regular intervals.
- **Help** icon . Opens a menu with further functions:
  - **Help**. Opens a context related help page. Depending on the current app, the respective help page from the online help is displayed.  
Tip: Some windows also include the help icon. If clicking on it, the respective help for the window context is displayed.
  - Giving feedback about the groupware
  - Depending on the configuration, there are several guided tours that help you get started with the groupware.
  - **About**. Shows information about the groupware.
- **Settings** icon . Opens a menu with further functions:
  - Customize settings.
  - Depending on the configuration: **Connect your Device**. Launches a wizard for setting up local apps with which you can access your groupware data.
- **My account** icon. Your profile picture is used for the icon. If clicking on it, a menu with several functions opens:
  - Depending on the configuration: Icons for setting your availability for calls and chat conversations.
  - **Download personal data**. Opens a window where you can adjust your personal contact data in the global address book.
  - **Sign out**. Signs you out from the groupware.


Depending on the configuration, further menu entries might be available.



## 2.2.2 App Launcher

Note: The following is a schematic representation.



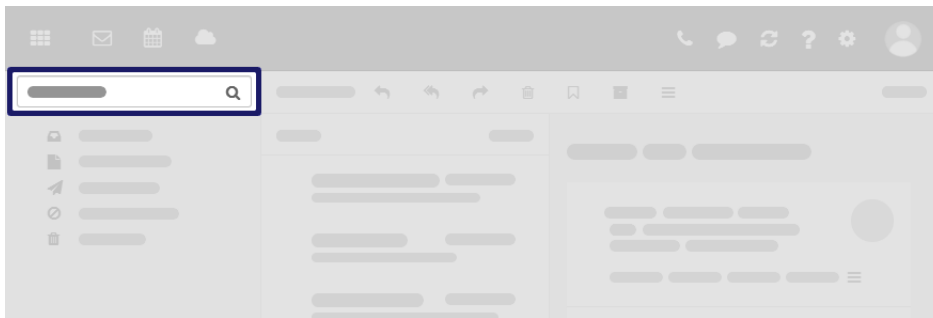
In order to show the app launcher, click the **All Applications** icon  in the menu bar.

Content

- Contains squares for launching the apps. Depending on the configuration, the number of squares can vary.

## 2.2.3 The search bar

Note: The search bar contents are different for each app. The following is a schematic representation.



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

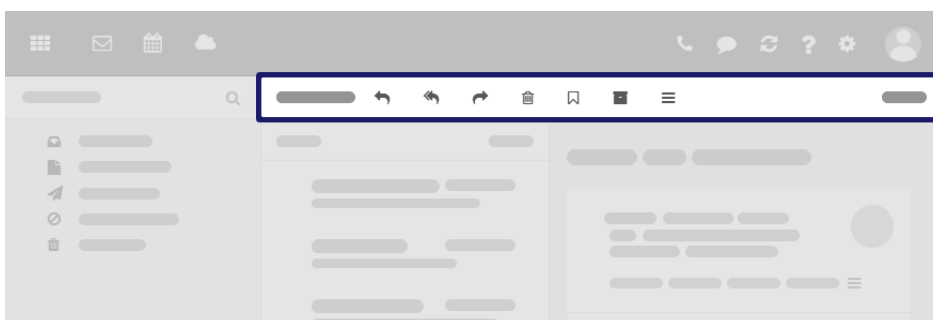
Content

- Input field for the search term  
As soon as clicking into the input field, additional functions are displayed in the search bar.
- **Cancel search** icon 🗑️. Finishes the search.
- Functions for selecting the folder to be searched
- **Options** icon ▼. Opens a menu with app specific parameters for controlling the search. Depending on the app, additional drop-downs for controlling the search are available.
- **Online help** icon ⓘ. Displays a context-sensitive help.

The search result is displayed in the display area.

## 2.2.4 The toolbar

Note: The toolbar contents are different for each app. The following is a schematic representation.



Content

- 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, further app specific buttons or icons might be available.
- **Actions** icon ☰. Contains app specific functions for organizing objects.
- **View** button. Contains functions for controlling the layout in the display area and for opening or closing the folder view.

## 2.2.5 The folder view


Note: The folder view contents are different for each app. The following is a schematic representation.



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

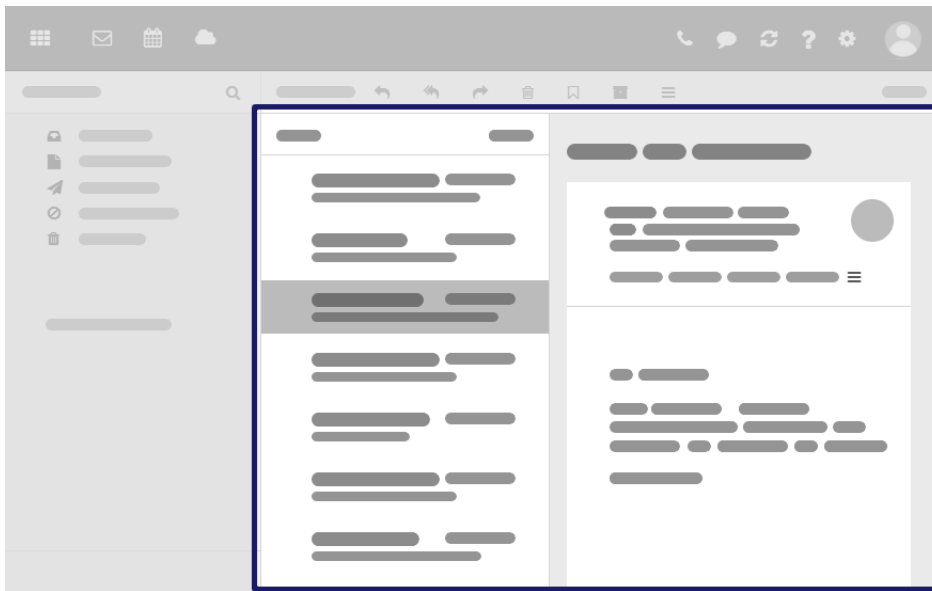
- Click on **View** in the toolbar. Enable or disable **Folder view**.
- On the bottom left side, click the **Open folder view** icon » or the **Close folder view** icon «.

Content

- The app specific folders
  - Folders are called differently in the following apps:
    - A folder is called address book in the Address Book app.
    - A folder is called calendar in the Calendar app.
- Depending on the application, sections for personal, public and shared folders
  - Note: Depending on the 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 organizing folders. Depending on the folder, further functions might be available. You can also use the **context menu**.
- Depending on the app, further functions might be available.

## 2.2.6 The display area

Note: The display area contents are different for each app. The following is a schematic representation.



### Content

- a list of app specific objects: E-Mails, contacts, appointments, tasks, files
- 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.

You can change the view in the display area by clicking on **View** in the toolbar.

## 2.2.7 The pop-up

Note: The pop-up contents are different for each app. The following is a schematic representation.



Shows an object's details. The following actions open the pop-up:

- clicking on an E-Mail, an appointment or a task in the app Portal
- clicking on a sender or recipient in an E-Mail's detail view
- clicking on an appointment's or a task's participant
- clicking on an appointment in a calendar view

Content

- **Close icon** ✕
- Buttons for executing frequently used functions. The buttons differ depending on the object selected by you.
- The data of the object selected by you. The display of a person's data is called **Halo View**.
- If clicking on certain objects in the pop-up, a further pop-up opens.

## 2.2.8 The notification area


Note: The following is a schematic representation.






Displays notifications about the following events:

- new appointment invitations
- reminder for a scheduled appointment or task

The following actions open the notification area:

- Clicking the **Notification** icon  in the menu bar. The icon is displayed when receiving a new notification.
- Depending on the settings, the notification area automatically opens if there is a new notification.

Content

- **Close** icon . The notifications are displayed again if the notification area reopens.
- **Notify me again later**. The notifications are displayed again later.
- An appointment or task invitation includes the following elements:
  - **Delete** icon . Deletes the invitation.
  - Appointment invitations: **Open in calendar** button. Displays the appointment suggestion in the calendar.
  - **Accept/Decline** button. Opens the *Change confirmation status* window for accepting or declining the appointment or task.
  - **Accept** button. Accepts the appointment or task.
- An appointment or task reminder includes the following elements:
  - **Delete** icon , **OK** button. Deletes the reminder.
  - Clicking on the reminder shows details in the pop-up.
  - **Remind me again**. Opens a menu for setting a new reminder for this appointment or task.
  - For reminders of overdue tasks: **Done** button. Clicking on it marks the task as done.
- If there is more than one reminder: **Remove all reminders** button. Clicking on it deletes all reminders and closes the notification area.

## 2.2.9 The editing window




Note: The editing window contents are different for each app. The following is a schematic representation.



The following actions open the editing window:

- creating or editing objects
- editing the personal contact data
- creating or editing simple text files

Content

- The title bar includes the following elements:
  - window title
  - icons for setting the window position:
    - **Minimize** icon . Displays the editing window as icon at the bottom.
    - **Maximize** icon . Displays the editing window in its maximum size. If clicking the icon again, the original size is restored. You can also double-click on the title bar again to toggle the window sizes.
    - **Close** icon . Cancels the current action. Closes the Format window.
- Depending on the app or function, various buttons, icons or input fields are available.
- Depending on the configuration, a function bar with buttons for closing, canceling or other functions are displayed at the top or the bottom.

Properties

- You can move an editing window by clicking on its title bar and dragging it to the wanted location.
- You can activate further functions while an editing window is open.
- You can open multiple editing windows.
- Minimized editing windows are displayed as icons at the bottom. In order to restore an editing window, click the icon.


---

## 3 Basic Settings

### 3.1 Customizing the basic settings

In the basic settings, you can set the language, the regional settings and other personal settings.

#### How to customize the basic settings:

1. Click the **Settings** icon  on the right side of the menu bar. Click on **Settings**.
2. Click on **Basic settings** in the sidebar.

The following settings are available as default:

#### Language

Defines the user interface language.

#### More regional settings

Opens a window for customizing regional settings. The preset regional settings depend on the selected language.

#### Timezone

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

#### Design

Defines the color scheme for the user interface.

#### Refresh interval

Defines the interval for retrieving new objects from the server.

#### 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 area automatically opens when receiving a new notification or E-Mail.

#### Show desktop notifications

Defines whether you will receive a desktop notification for new E-Mails. Depending on the browser settings, the **Manage browser permissions now** button is displayed. If clicking on the button, a browser specific dialog for allowing notifications opens.

#### Configure quick launchers

Opens a window that enables you to define the apps that should be displayed as quick launch icons in the menu bar. Depending on the configuration, you can set a different number of quick launch icons. You can also open the window from a quick launch icon's context menu.

#### My contact data

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.



---

## 4 Portal

### How to start the Portal app

Click the **All Applications** icon  in the menu bar. Click on **Portal** in the App Launcher.

## 4.1 Customizing the Portal

Note: Depending on the configuration, some widgets might not be changeable.

### 4.1.1 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.

### 4.1.2 Adding Portal widgets

You can extend the existing widgets by adding new ones.


#### How to add new widgets:

1. Use one of the following methods:
  - Click the **Settings** icon  on the right side of the menu bar. Click on **Settings**. Click on **Portal** in the sidebar. Click on **Add widget**. Select an entry.
  - Click on **Add widget** on the upper right side of the Portal app. Select an entry.
2. Some widgets require additional data. Enter the required values.

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## 5 E-Mail

### How to start the E-Mail app

Click the **All Applications** icon  in the menu bar. Click on **E-Mail** in the App Launcher.

Depending on the configuration, you can also click the quick start icon in the menu bar for launching the **E-Mail** app.

### 5.1 Displaying E-Mails

Learn how to select a specific E-Mail in a folder and display it in different ways in order to read it.


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


1. Open an E-Mail folder in the folder view.

When having selected the **Inbox** folder and if you are using E-Mail categories, you can select a category.

2. 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-Mails in the conversation will be 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-Mails 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 .

Options:

- To sort the E-Mail list, click on **Sort by** above the list.  
Note: To reduce latency when loading the E-Mail list, only a certain percentage of the E-Mails 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.
- In order to select a layout, click on **View** in the toolbar.
- When having selected the **List** view, a list of all E-Mails in the folder will be shown in the display area. If clicking on an E-Mail, the E-Mail's detail view will be displayed.  
To open the list view again or to browse the E-Mails, use the icons above the detail view.
- You can open the E-Mail in a window by double-clicking on the E-Mail in the list.


Note: Depending on the configuration, the content of very big E-Mails 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.

Tip: In the E-Mail settings, you can define whether a notification sound is to be played for incoming E-Mails.


## 5.2 Sending E-Mails

### 5.2.1 Sending a new E-Mail

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

1. Click on **Compose** in the toolbar.
2. Enter the recipients' E-Mail addresses in the **To** field.
  - While entering the recipients, matching suggestions will be displayed. To accept a suggestion, click on it.
  - To select contacts from an address book, click the **Select contact** icon  on the right side of the input field.
3. To send a copy to other recipients, click on **CC** or **BCC** on the upper right side.
  - If the recipients are to see who gets a copy of the E-Mail, enter the recipients in the **CC** field.
  - If the recipients are not to see who gets a copy of the E-Mail, enter the recipients in the **BCC** field.
4. Enter a subject. Enter the E-Mail text.
5. Click on **Send**.

### 5.2.2 Selecting contacts from an address book

You can select contacts from an address book in the *Select contacts* window. The window opens if you click the **Select contacts** icon  while:




- selecting the recipient when sending an E-Mail
- adding participants to an appointment or task
- inviting persons to a share

#### How to select contacts from an address book in the *Select contacts* window:

1. You have the following possibilities to find a specific contact:
  - Enter a name in **Search**.
  - To view the contacts of a specific address book, click on **All folders**. Select an address book from the list. Depending on the configuration, you can select a department from the list.
2. Select at least one contact. The selected items will be displayed below the list. To undo the selection, click on **Clear selection**.  
You can also use your system's multi selection functions.
3. In confirm your selection of selected contacts, click on **Select**.

## 5.2.3 Adding attachments

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




1. Select the files to be sent as attachment.
  - To send a local file as attachment, click the **Add local file** icon  in the button bar. Select at least one file.  
You can also add an attachment by dragging one or several files from a file browser or from the desktop to the E-Mail window.
  - Depending on the configuration, you can send the current version of a file from the Drive app as attachment. To do so, click the **Add from Drive** icon  in the button bar.  
Open a folder in the *Add attachments* window. Select at least one file.
2. You can remove an attachment if required. To do so hover over an attachment. Click the **Remove attachment** icon .

## 5.2.4 Replying to E-Mails

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

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

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

1. Select an E-Mail.
  2. Click the **Reply to sender** icon  in the toolbar. To also reply to all other recipients click the **Reply to all recipients** icon .
  - You can also use one of the following methods:
    - Click on the **Reply** or **Reply all** button in the detail view.
    - Use the context menu in the E-Mail list.
  - To send a new E-Mail to the sender and the other recipients, click the **More actions** icon  in the detail view. Click on **Send new email**.
3. Fill in the details for sending the E-Mail.


## 5.2.5 Forwarding E-Mails

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

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

If you forward multiple E-Mails, the selected E-Mails are sent as attachments in eml format.



**How to forward an E-Mail:**

1. Select one or several E-Mails.
2. Click the **Forward** icon  in the toolbar.  
You can also use one of the following methods:
  - Click on the **Forward** button in the detail view.
  - Use the context menu in the E-Mail list.
3. Select one or more recipients.
4. Fill in the details for sending the E-Mail.

## 5.2.6 Sending an E-Mail to appointment participants

You can send an E-Mail to all appointment participants.


**How to send an E-Mail to all appointment participants:**

1. Depending on the selected view, you have the following options in the Calendar:
  - In a calendar view, click on an appointment with multiple participants. In the pop-up, click the **More actions** icon . Click on **Send mail to all participants**.
  - In the list view, double-click on an appointment with multiple participants. The appointment will be displayed in a window. Click the **More actions** icon . Click on **Send mail to all participants**.
2. Fill in the details for sending the E-Mail.

## 5.3 Adding E-Mail Folders

With E-Mail folders you can organize your E-Mails, e.g. by separately saving E-Mails for customers or projects. Learn how to create additional E-Mail folders below your primary E-Mail account.

**How to create a new E-Mail folder:**

1. Select the folder in which you want to create the new subfolder in the folder view.
2. Click the **Actions** icon  next to the folder name. Click on **Add new folder**.  
A window opens.
3. Enter a name. Click on **Add**.




## 5.4 Managing E-Mails

### 5.4.1 Marking E-Mails as read or unread

Unread E-Mails are marked with the Unread icon . The following options exist:

- mark single E-Mails as read or unread
- mark all E-Mails of an E-Mail folder as read


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

1. Select one or several E-Mails.
2. Click the **More actions** icon . Select **Mark as unread** or **Mark as read**.  
Or:
  - For single E-Mails, click the **Mark as unread** icon  or the **Mark as read** icon  in the detail view.
  - Use the context menu in the E-Mail list.

Tip: To mark all E-Mails in a folder as read, click on **All** above the list. Select **Mark all E-Mails as read**.


## 5.4.2 Deleting E-Mails

### How to delete an E-Mail:

1. Select one or several E-Mails.
2. Click the **Delete** icon  in the toolbar.  
You can also use one of the following methods:
  - Press the [Del] or [Backspace] key on the keyboard.
  - Use the **Delete** button in the detail view.
  - Use the context menu in the E-Mail list.


Result: The E-Mail will be moved to the **Trash** folder.

### How to delete all E-Mails of a folder:

1. In the folder view, select the folder which E-Mails you want to delete.
2. You have the following options:
  - Click on **All** above the list. Select **Delete all messages**.
  - Click the **Actions** icon  next to the folder name. Click on the **Delete all messages** button.


Result: The E-Mail will be moved to the **Trash** folder.

### How to recover deleted E-Mails:

1. Open the **Trash** folder in the folder view.
2. Select one or several E-Mails.
3. Click the **More actions** icon  in the toolbar. Click on **Move**.
4. Select a folder in the *Move* window. Click on the **Move** button.

### How to permanently delete the content of the Trash folder:

**Warning:** Permanently deleted E-Mails can **not** be recovered. Before permanently deleting an E-Mail, make sure you no longer need the E-Mail.


1. Select the **Trash** folder in the folder view.
2. Click the **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.

---

## 6 Address Book

### How to launch the Address Book app:

Click the **All Applications** icon  in the menu bar. Click on **Address Book** in the App Launcher.

### 6.1 Displaying contacts

Learn how to select a specific contact from an address book and to display its data.

#### How to display a contact:

1. Select an address book in the folder view.
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.

Options:

- Use the cursor keys to browse the list.
- You can open a contact in a window by double-clicking on the contact in the list.


### 6.2 Displaying Contacts in the Halo View

In the E-Mail, Calendar or Tasks app, you can display all relevant information about a contact in the halo view.

#### 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.

Depending on the contact's entries in the address book, those data will be displayed in a pop-up:

- picture, name, business data
  - An icon below the name indicates the contact's presence status.
  - Icons for communicating with the contact:
    - **Email**. Opens the window for composing an E-Mail.
    - **Chat**. Starts a private chat with this contact
    - **Call**. Opens a menu with functions for calling.
    - **Invite**. Opens the window for creating an appointment.
  - Date of birth, marital status, business data
  - E-Mail addresses, phone numbers, addresses
  - The address book in which the contact is saved
  - Your recent conversations with this contact If clicking on an E-Mail, its content will be displayed in a pop-up.
  - Shared appointments with this contact. If clicking on an appointment, its data is shown in a 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

#### How to create a new contact:

1. Open an address book in the folder view.  
Note: Open an address book for which you have the appropriate permissions to create objects.
2. Select **New contact** from the toolbar. Click on **New contact**.
3. Enter the data.
4. Click on **Save**.

### 6.3.2 Adding a contact from a vCard attachment

You can add a contact from a vCard attachment to an E-Mail. A vCard attachment per 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 **Add to address book** in the detail view.

## 6.4 Editing Contacts or Distribution Lists

A contact's or distribution list's contact data can be edited at a later point of time.

Prerequisite: You have the appropriate permissions to edit objects in the address book containing the contact or distribution list.

#### How to edit a contact or distribution list:

1. Select a contact or a distribution list from the list.
2. Click on **Edit** in the toolbar. The data are displayed.
3. Edit the data.
4. Click on **Save**.

## 6.5 Adding Address Books

### 6.5.1 Adding address books

You can create additional personal address books below My address books.

#### How to create a new personal address book:

1. In the folder view, click on **Add new address book**. A menu opens.  
Click on **Personal address book**. A window opens.
2. Enter a name. In case the new address book should be a public address book, enable **Add as public folder**. Click on **Add**.






## 6.5.2 Refreshing and managing subscribed address books

The following options exist:

- refresh a subscribed address book
- show all subscriptions
- disable or enable a subscription
- remove a subscription

### How to manage subscribed address books:

1. Click the **Settings** icon  on the right side of the menu bar. Click on **Settings**.
2. In the sidebar, click on **Subscriptions**.
3. Use the following methods:
  - To refresh a subscribed address book, click on **Refresh** next to a subscription in the display area.
  - To show the folder with the subscribed data, click on the navigation path below the subscription's name.  
To only display this information for a specific folder, click the **Subscriptions** icon  next to a folder with subscriptions, in the folder view.
  - To disable or enable a subscription, click on **Disable** or **Enable** in the display area next to a subscription.
  - To remove a subscription, click the **Delete** icon  next to a subscription in the display area.

## 6.5.3 Subscribing to public and shared address books

Address books that are public or shared by other users can be used as follows:

- You can define which public and shared address books are displayed in the folder view by subscribing to such address books.  
This helps you to keep a better overview if there are many public and shared address books in your groupware environment.
- If you subscribed to such an address book, you can set whether this address book will be synchronized with other clients, e.g. with your smartphone.
- If you no longer need such an address book, you can cancel the subscription.

### How to define the address books to which you want to subscribe and which are to be synchronized:

1. In the folder view, click on **Add new address book**. A menu opens.  
Click on **Subscribe shared address book**.  
You can also use the **Subscribe shared address books** button in the address book settings.  
A window opens. It shows your private, the public and shared address books.
2. If you want an address book to be displayed, enable the **subscribe address book** button .  
To define that a displayed address book is synchronized, enable the **Synchronize via DAV** checkbox.  
If you no longer want an address book to be displayed and synchronized, disable the **subscribe address book** button .

## 6.6 Managing Contacts

### 6.6.1 Sending E-Mails from within an address book

You can send an E-Mail from within your address book to contacts or to a distribution list.

**How to send an E-Mail from within an address book:**

1. Select a single contact, multiple contacts or distribution lists from the list.
2. Click on **Send email** in the toolbar.
3. Fill in the details for sending the E-Mail.

## 6.6.2 Inviting contacts to an appointment

You can use the address book to invite contacts or a distribution list's contacts to an appointment.

**How to invite contacts to an appointment:**

1. Select a single contact or distribution list, multiple contacts or distribution lists from the list.
2. Click on **Invite** in the toolbar.
3. Complete the details for creating the appointment.


## 6.6.3 Importing contacts

You can import contacts from files that have the following formats:

- vCard. Note the following:
  - Make sure the file to be imported contains correct vCard data.
  - For each contact only one private and one business address are imported. If the imported vCard file contains additional private and business addresses, those addresses are ignored when importing.
- CSV The following CSV files are supported:
  - Standard CSV files with comma separated values
  - CSV files from the following Microsoft Outlook versions:
    - Microsoft Outlook 2003, 2007
    - German, English, and French language versions

The correct format of the CSV file is automatically recognized. The data assignment to specific data fields depends on your configuration. Further information are provided by your administrator or host.

**How to import contacts from a file:**

1. Select the address book for importing the contacts to in the folder view.
2. Click the **Actions** icon  next to the address book. Click on **Import**.
3. Select the wanted format in the *Import from file* window. Click on **Upload file**. Select a suitable file.
4. Click on **Import**.

Result: The contacts are added to the address book.

## 6.6.4 Deleting contacts

**Warning:** If you delete contacts or distribution lists, those items are irrevocably lost.

**How to delete contacts:**


1. Select a single contact or distribution list, multiple contacts or distribution lists from the list.
2. Click on **Delete** in the toolbar.
3. Confirm that you want to delete the items.

Result: The items will be deleted.

---

## 7 Calendar

### How to start the Calendar app

Click the **All Applications** icon  in the menu bar. Click on **Calendar** in the App Launcher. Depending on the configuration, you can also click the quick start icon in the menu bar for launching the Calendar app.

## 7.1 Viewing Appointments

### 7.1.1 Displaying appointments in a calendar view

#### How to display appointments in a calendar view:


1. Click on **View** in the toolbar. Select one of the following entries: **Day**, **Work week**, **Week** or **Month**.
2. Select a calendar in the folder view. Make sure the checkbox next to the calendar is enabled.
3. 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 toolbar.
4. Click on an appointment in the calendar sheet. The calendar's data is displayed in the pop-up.

### 7.1.2 Displaying appointments in the list view

#### How to display an appointment in the list view:

1. Click on **View** in the toolbar. Select **List**.
2. Select a calendar in the folder view. Make sure the checkbox next to the calendar is enabled.
3. Click on an appointment in the list. The appointment's data is displayed in the detail view.

Options:

- To view the appointments of other calendars, enable the checkboxes next to the respective calendars.  
Note: if a subscribed calendar is marked with an exclamation mark, there is an issue with retrieving this calendar's appointments. To get further information, click on the exclamation mark.
- To only view the appointments of a single calendar, you have the following options:
  - Double-click on the calendar in the folder view.  
To display the previously displayed calendars again, double-click on this calendar again.
  - Click the **Actions** icon  next to the calendar. Click on **Show this calendar only**.
  - Disable the checkboxes next to the other calendars.
- Use the cursor keys to browse the list.
- You can open an appointment in a window by double-clicking on the appointment in the list.

## 7.2 Creating Appointments

### 7.2.1 Creating new appointments

#### How to create a new appointment:

1. Open a calendar in the folder view.
2. Select **New appointment** from the toolbar.  
If selecting a shared calendar, you are asked where to create the appointment:
  - If you create the appointment on behalf of the owner, the appointment is created in the owner's shared calendar.
  - If you invite the owner to the appointment though, the appointment is saved in your calendar.If you selected a public calendar, you are asked as a precaution whether you want to create the appointment in the public calendar.
3. Enter a subject. If required, enter the location.
4. To set an appointment's start and end time, use the following options below **Start date** and **Ends on**.
  - Click on a date. The date picker opens. Enter a date or select a date in the date picker.  
For all day appointments, activate **All day**.
  - Click on a time. Enter the time or select a time from the list.
  - You can set the timezone for the start or end time by clicking on the timezone button next to a time. You can set different timezones for the start and end time.
5. You can enter a description.  
If you want to create the appointment in another calendar, click on the calendar name below **Calendar**. Select a calendar.
6. Click on **Create**.



Example: How can I organize another person's appointments as a representative?

- Ask the other person to share a calendar folder with write permissions.
- Enter this person's appointments in this folder. The other person will be displayed as the organizer of the appointments.

### 7.2.2 Inviting participants to a new appointment

If an appointment has several participants, you can invite those participants to a new appointment.


#### How to invite participants to a new appointment:

1. Depending on the view, you have the following possibilities:
  - In a calendar view, click on an appointment with multiple participants. In the pop-up, click the **More actions** icon .
  - In the list view, double-click on an appointment with multiple participants. The appointment will be displayed in a window. Click the **More actions** icon .Click on **Invite to new appointment**.
2. Complete the details for creating an appointment.

### 7.2.3 Inviting E-Mail recipients to new appointments

If there are several E-Mail recipients, all recipients can be invited to a new appointment.

**How to invite all E-Mail recipients to an appointment:**

1. Select an E-Mail in the E-Mail app.
2. Click the **More actions** icon  in the detail view.  
Click on **Invite to appointment**.
3. Complete the details for creating an appointment.

## 7.3 Editing appointments

The following options exist:

- You can edit all appointment data in the appointment's editing window.
- You can also change the appointment's time or duration in a calendar view:
  - move an appointment to another day
  - change an appointment's time or duration

Prerequisite: You have the appropriate permissions to modify objects in the calendar containing the appointment.

**How to edit an appointment in the appointment's editing window:**

1. Depending on the view, you have the following possibilities:
  - 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 toolbar.

When having selected a serial appointment, you are asked to which appointments of the series the changes should be applied:

- When having selected the first appointment of the series, you can either only change the first appointment or the complete series.
- For all other appointments within the series, you can either only change the selected appointment or the selected appointment and all future appointments of the series.

The appointment's data is displayed.

2. Edit the data.
3. Click on **Save**.

**How to move an appointment to another day:**

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

**How to change an appointment's time or duration:**

1. Select one of the following views: **Day**, **Work week** or **Week**.
2. Use one of the following methods:
  - Drag the appointment to another time.
  - Drag the start or end time to another time.

## 7.4 Adding Calendars

### 7.4.1 Adding personal calendars

You can create additional personal calendars below My calendars.

### How to create a new personal calendar:

1. Click on **Add new calendar** in the folder view. A menu opens.  
Click the **Personal calendar**.  
A window opens.
2. Enter a name. In case the new calendar should be a public calendar, enable **Add as public calendar**.  
Click on **Add**.

## 7.4.2 Subscribing to public and shared calendars

Calendars that are public or shared by other users can be used as follows:

- You can define which public and shared groupware calendars are displayed in the folder view by subscribing to such calendars.  
This helps you to keep a better overview if there are many public and shared calendars in your groupware environment.
- If you subscribed to such a calendar, you can set whether this calendar will be synchronized with other clients, e.g. with your smartphone.
- If you no longer need such a calendar, you can cancel the subscription.

### How to define the calendars to which you want to subscribe and which are to be synchronized:


1. In the folder view, click on **Add new calendar**. A menu opens.  
Click on **Subscribe shared Calendar**.  
You can also use the **Subscribe shared Calendar** button in the E-Mail settings.  
A window opens. It shows your private, the public and shared calendars.
2. If you want a calendar to be displayed, enable the **subscribe to calendar** button .  
To define that a displayed calendar is synchronized, enable the **Synchronize via DAV** checkbox.  
If you no longer want a calendar to be displayed and synchronized, disable the **subscribe to calendar** button .

## 7.5 Managing Appointments

### 7.5.1 Importing appointments

You can import appointments from files in iCal format.

#### How to import appointments from an iCal file:

1. Select the calendar for importing the appointments to in the folder view.
2. Click the **Actions** icon  next to the calendar. Click on **Import**.
3. In the *Import from file* window, click on **Upload file**. Select a file in iCal format.  
To also import appointments that have the same id as already existing appointments, enable **Ignore existing appointments**.
4. Click on **Import**.

Result: The contacts are added to the calendar.

Note: All participants of the imported appointments will be removed. Instead, you will be added as participant.

## 7.5.2 Deleting appointments

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

### How to delete appointments:


1. Depending on the view, you have the following possibilities:
  - Click on an appointment in a calendar view. In the pop-up, click on **Delete**.
  - Select an appointment or multiple appointments in the list view. Click on **Delete** in the toolbar.
2. Confirm that you want to delete the appointment.

Result: The appointment will be deleted.

---

## 8 Tasks

### How to start the Tasks app

Click the **All Applications** icon  in the menu bar. Click on **Tasks** in the App Launcher.


## 8.1 Viewing Tasks

Learn how to display the tasks in a tasks folder in different ways:

### How to display a task:

1. Open a task folder in the folder view.
2. Click on a task in the list. The task's data is displayed in the detail view.

Options:

- To sort the task list or to only display due tasks, click the **Sort** icon  above the list.
- You can open the task in a window by double-clicking on the task in the list.

## 8.2 Creating Tasks

### 8.2.1 Creating new tasks

#### How to create a new task:

1. Open a task folder in the folder view.  
Note: Select a folder for which you have the permission to create tasks.
2. Click on **New task** in the toolbar.
3. Enter a subject. Enter a description, if needed.
4. Click on **Create**.

## 8.3 Editing tasks

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

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

#### How to edit a task:

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

## 8.4 Adding Task Folders

### 8.4.1 Adding personal task folders

You can create additional personal task folders below My tasks.



**How to create a new personal task folder:**

1. In the folder view, click on **Add new folder**. A menu opens.  
Click on **Personal folder**. A window opens.
2. Enter a name. In case the new folder should be a public folder, enable **Add as public folder**. Click on **Add**.

## 8.4.2 Subscribing to public and shared task folders

Task folders that are public or shared by other users can be used as follows:

- You can define which public and shared task folders are displayed in the folder view by subscribing to such folders.  
This helps you to keep a better overview if there are many public and shared task folders in your groupware environment.
- If you subscribed to such a task folder, you can set whether this task folder will be synchronized with other clients, e.g. with your smartphone.
- If you no longer need such a task folder, you can cancel the subscription.

**How to define the task folders to which you want to subscribe and which are to be synchronized:**

1. In the folder view, click on **Add new folder**. A menu opens.  
Click on **Subscribe shared task folder**.  
You can also use the **Subscribe shared task folder** button in the tasks settings.  
A window opens. It shows your private, the public and shared task folders.
2. If you want a task folder to be displayed, enable the **subscribe task folder** button .  
If you want a displayed task folder to be synchronized, enable the **Synchronize via DAV** checkbox.  
If you no longer want a task folder to be displayed and synchronized, disable the **subscribe task folder** button.

## 8.5 Managing tasks

### 8.5.1 Marking tasks as done

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


**How to mark a task as done:**

1. Select a task or multiple tasks from the list.
2. Click on **Done** in the toolbar.  
To mark the selected tasks as undone, click on **Undone**.

### 8.5.2 Importing tasks

You can import tasks from files in iCal format.

**How to import tasks from an iCal file:**

1. Select the task folder for importing the tasks to in the folder view.
2. Click the **Actions** icon  next to the task folder. Click on **Import**.
3. In the *Import from file* window, click on **Upload file**. Select a file in iCal format.  
To also import tasks that have the same id as already existing tasks, enable **Ignore existing events**.
4. Click on **Import**.

Result: The tasks are added to the folder.

### 8.5.3 Deleting tasks

**Warning:** When deleting a task, this task is irrevocably lost.

**How to delete tasks:**


1. Select a task or multiple tasks from the list.
2. Click on **Delete** in the toolbar.
3. Confirm that you want to delete the task.

Result: The task will be deleted.

---

## 9 Drive

### How to start the Drive app

Click the **All Applications** icon  in the menu bar. Click on **Drive** in the App Launcher.

Depending on the configuration, you can also click the quick start icon in the menu bar for launching the app. Drive


## 9.1 Viewing files


### 9.1.1 Displaying files in the viewer

#### How to display files in the viewer:

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

In order to display details of a selected file, click on **View** in the toolbar. Enable **File details**.

3. To change the sorting, click on **Sort by** in the navigation bar.  
In order to display specific object types only, click on **Select** in the navigation bar.
4. Use one of the following methods:
  - Double-click on a file in the display area.
  - Select one or several files in the display area. Click the **View** icon  in the toolbar.
  - Select **View** from the context menu.

To display details for the selected file, enable the **Show details** icon .


In order to open the previous or next file, click the **Back** icon  or the **Next** icon  next to the view.

## 9.2 Downloading Files or Folder Contents


The following options exist:

- download one or several files
- download the complete content of a folder as zip archive

#### How to download files:

1. Open a folder containing files.  
Select one or several files in the display area.
2. Use one of the following methods:
  - Click the **Download** icon  in the toolbar.
  - Select **Download** from the context menu.
  - Use the **Download** button in the Viewer.
3. Complete the steps for downloading the folder.


#### How to download the complete content of a folder:

1. In the folder view, select the folder which content you want to download.
2. Click the **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.  
You can also download a folder by using the context menu in the display area.

## 9.3 Driveadd folder

### 9.3.1 Drive: Creating Folders

#### How to create a new folder:

1. Select **My files** or another folder in the folder view.  
Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click on **New** in the toolbar. Click on **Folder**.  
You can also click the **Actions** icon  next to the folder name in the folder view. Click on **Add new folder**.
3. Enter a name in the *Add new folder* window. Click on **Add**.

### 9.3.2 Subscribing to public and shared Drive folders

You can define which public and shared Drive folders are displayed in the folder view by subscribing to such folders.

#### How to define the Drive folders you want to subscribe to:

1. In the folder view, click on **Manage Shares**.  
A window opens. It shows the public and shared Drive folders.
2. If you want a folder to be displayed, enable the **Subscribe to folder** button .  
If you no longer want a folder to be displayed and synchronized, disable the **Subscribe to folder** button.

## 9.4 Uploading Files or Folders

#### How to upload files:

1. Open a Drive folder.  
Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click on **Upload** in the toolbar. Click on **File**.
3. Select a local file or multiple local files in the *Upload file* window.  
Click on **Open**. The current progress status will be shown in the display area.

#### How to upload a folder:

1. Open a Drive folder.  
Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click on **Upload** in the toolbar. Click on **Folder**.
3. Select a local folder in the *Select folder for upload* window.  
Click on **Upload**. The current progress status will be shown in the display area.  
Note: If there is already a Drive folder with this name, the name of the newly uploaded folder gets a consecutive number.

#### Tips:

- 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 objects, click on **Details** at the bottom right side of the display area. Click on **Cancel** next to a object name in the *Upload progress* window.
- You can continue working in the groupware during the upload process.



- You can also upload objects by dragging them from a file browser or from the desktop to the Drive app window and drop them in the display area.

## 9.5 Organizing Files and Drive Folders

### 9.5.1 Sending files as E-Mail 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.
2. Use one of the following methods:
  - Click the **More actions** icon  in the toolbar. Click on **Send by mail**.
  - Click on **Send by mail** in the context menu.
  - Use the **More actions** icon  in the Viewer.
3. In the E-Mail edit window, fill in the details to send a new E-Mail.

### 9.5.2 Editing file names


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

#### How to edit the file name:

1. Select a file in the display area.
2. Use one of the following methods:
  - Click the **More actions** icon  in the toolbar. Click on **Rename**.
  - Select **Rename** from the context menu.
  - Use the **More actions** icon  in the Viewer.
  - Click on the file name on the upper left side of the Viewer.
3. Edit the file name in the *Rename* window.


### 9.5.3 Deleting files or Drive folders

#### How to delete objects:

1. Select the objects in the display area.
2. Use one of the following methods:
  - Click the **Delete** icon  in the toolbar.
  - Select **Delete** from the context menu.
3. Confirm that you want to delete the items.

Result: The selected objects are deleted.

**How to restore deleted objects:**

1. Open the **Trash** folder.
2. Select the objects to be restored.
3. Use one of the following methods:
  - Click the **More actions** icon  in the toolbar. Click on **Restore**.
  - Select **Restore** from the context menu.

Result: The objects are restored in their original location.

---

## 10 Data Organization and Shares

### 10.1 Managing Data with Folders

#### 10.1.1 What are folder types?

The folder type defines the folder access for the users. The following folder types exist in the folder view:

- Personal folders
  - Personal folders contain your E-Mails, contacts, appointments, tasks, and files. Other users can not 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.

Depending on the configuration, the following folder types are available in addition:

- 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.

#### 10.1.2 Navigating within the folder structure

##### How to open or close the folder view:

Use one of the following methods:

- Click on **View** in the toolbar. Enable or disable **Folder view**.
- Below the folder view, click the **Open folder view** icon » or the **Close folder view** icon «.


##### How to open or select a folder:

1. If the folder view is closed, open it.
2. A folder in the E-Mail and Drive app can have subfolders. To view subfolders, click on the triangle button next to the folder name.  
You can also open or close a folder by double-clicking on it.
3. Click on a folder. The folder's items are displayed in the detail view.  
In the Drive app, you additionally have the following options:
  - 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 Renaming folders

You can rename subfolders in your personal folders. For other folders you need administrator permissions.


**How to rename a folder:**

1. In the folder view, select the folder that you want to rename.
2. Click the **Actions** icon  next to the folder name. Click on **Rename**.
3. Edit the name or enter a new name. Click on **Rename**.

**10.1.4 Moving folders**

You can move subfolders from your personal folders. For other folders you need the appropriate permissions. For the target folder you need the permission to create subfolders.

**How to move a folder:**


1. In the folder view, select the folder that you want to move.
2. Click the **Actions** icon  next to the folder name. Click on **Move**.
3. Select a folder in the *Move folder* window. You can create a new folder by clicking on **Create folder**.
4. Click on **Move**.

**10.1.5 Deleting folders**

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

**Warning:** If you delete a folder, all subfolders and objects in this folder will also be deleted. Deleted subfolders and objects can not be restored.

**How to delete a folder:**

1. In the folder view, select the folder that you want to delete.
2. Click the **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 Sharing Data**

You can co-operate with internal users or external partners by sharing the following data with read or edit permissions:




- E-Mail folders, address books, calendars, task folders  
The global address book can not be shared.
- Drive-folders, files

**10.2.1 Sharing data**

You can share data with internal users or external partners with read or edit access by inviting those persons to a shared item. The persons will receive an invitation E-Mail. If an external partner accesses the data, the partner will automatically be logged in as guest user. When sharing items, internal users or external partners are granted certain permissions for the shared data.



**How to share data with internal users or external partners:**

1. Select the app that should be used for sharing data. Select a folder in the folder view.  
In the Drive app, you can also select a folder or file in the display area.  
Note: Depending on the app, some folders can not be shared.
2. Click the **Actions** icon  next to the folder name. Click on **Share / Permissions**. Click on **Permissions** in the E-Mail app.  
In the Drive app, you can also click on **Share** in the toolbar or use the context menu in the display area.  
The window for granting permissions opens.
3. In **Who can access this folder?**, you can define whom to grant access to the data:
  - If you exclusively want to share the data with specific persons, select **Invited people only**.
  - If you want to share the data not only with specific persons, but with all persons who get a link to the data, select **Anyone with the link and invited people**.
4. To invite the wanted persons, enter a name or an E-Mail address in **Invite people**.
  - To set a person's permission, select a user role in **Invite as**.
  - To adjust the user role of a person added, click on the assigned user role next to the person or on **Details**.
  - To remove a person's permission, click the **Actions** icon  next to the person. Click on **Remove**.
 If you invite persons, the **Invitation message (optional)** input field will be displayed. If required, enter a message.  
If you selected **Anyone with the link and invited people**, you can pass on the link by clicking on **Copy link** next to the link.
5. In order to adjust the settings, click the **Sharing options** icon  in the title bar. The following settings are available:
 

Link options:

  - To set a time limit for the access to the shared data, select a time frame in **Expiration**.
  - To protect the access with a password, enter a password in **Password (optional)**. If you send the public link per E-Mail, the E-Mail contains the password.
  - If a link should also include all subfolders, enable **Share with subfolders**.


Invitation options

  - To automatically send a message to persons who are invited by you to a shared item, enable **Send notification by email**.
  - To also apply all changes to a share to subfolders, enable **Apply to all subfolders**.

**10.2.2 Subscribing to shared or personal E-Mail folders**

In order to see E-Mail folders shared by other users, you have to subscribe to those folders. You are automatically subscribed to your personal E-Mail folders. To hide a personal E-Mail folder, you have to cancel the subscription.

**How to subscribe to personal or shared E-Mail folders:**

1. Click the **Settings** icon  on the right side of the menu bar. Click on **Settings**.
2. Click on **E-Mail** in the sidebar.
3. Click on **Change IMAP subscription** in the display area.
4. In the *Subscribe IMAP folders* window activate the checkboxes of the folders that you want to subscribe to. Click on **Save**.

## 10.2.3 Accessing other users' shares


In the folder view, you have access to data shared with you by other users. You can define which public and shared address books, calendars or task folders are displayed in the folder view.

### How to access data shared by other users:

1. Open the shared folder in the folder view. 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. If the shared data comes from another groupware installation, the user name will be appended with the name of the other domain.

You are automatically subscribed to shared address books, calendars and task folders. To hide those folders, cancel the subscription in the settings of the respective app.

Tip: To see the permissions that have been granted for the shared folder, click the **Actions** icon . Click on **Sharing**.

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.

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