



Groupware
Compact Guide



Groupware: Compact Guide

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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 page 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 page 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.



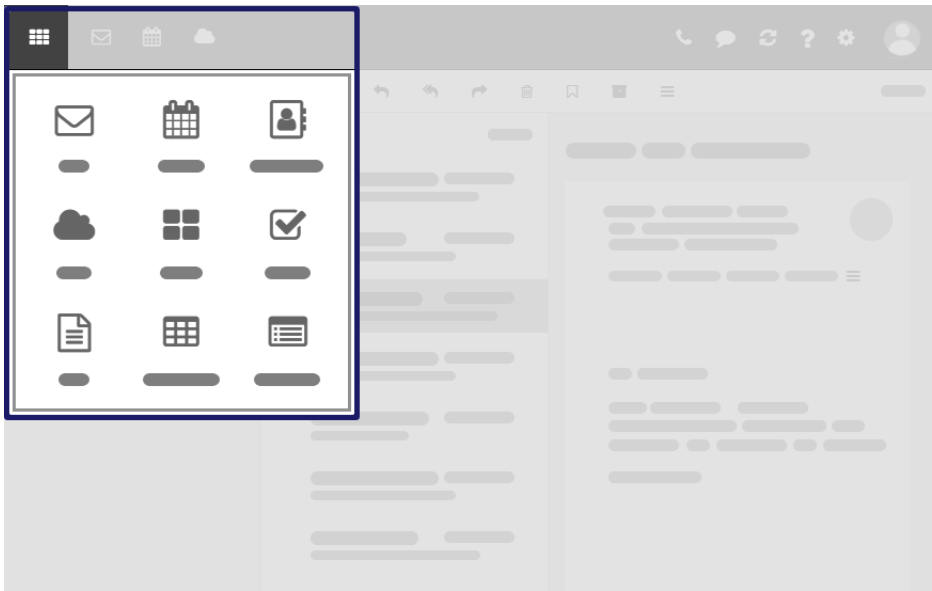
Content


- **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.
- **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.
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. Opens a menu with further functions:
 - **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.



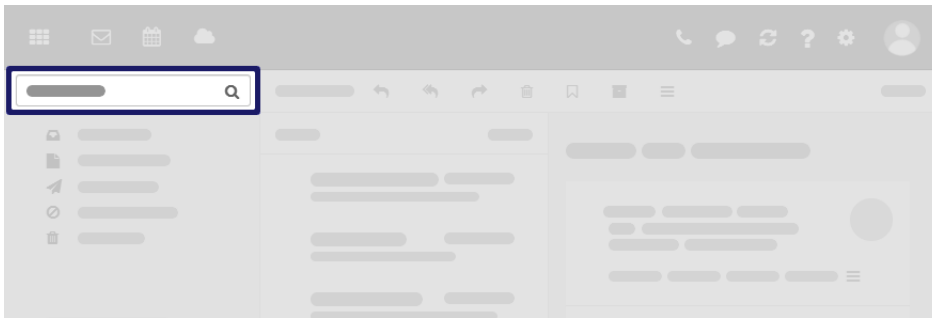
In order to show the app launcher, click the **All Applications** icon .

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**.

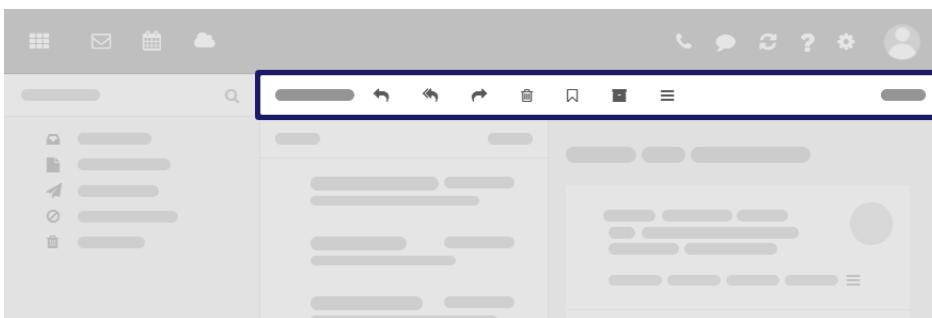
Content

- 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.

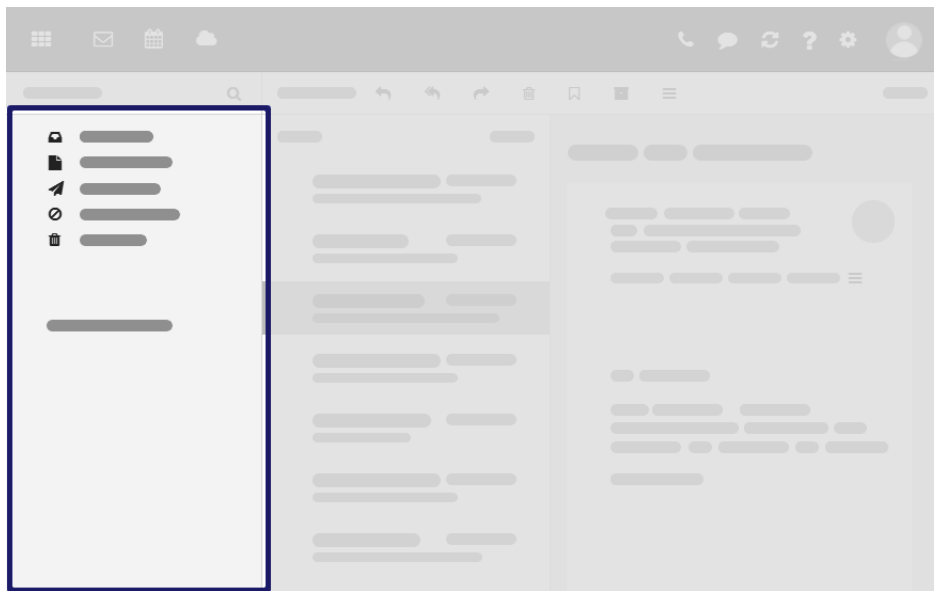


Content

- Buttons for creating new objects, e.g. a new email 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**.
- Click the **Open folder view** » or **Close folder view** «.

To adjust the folder view width, hover over the line between the folder view and the display area.

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 or the configuration, sections for personal, public and shared folders
- The **Folder-specific actions** icon  next to the selected folder. It contains functions for organizing folders. 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: emails, contacts, appointments, tasks, files
To adjust the list width, hover over the line between the list and the detail view.
- 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.
If double-clicking on an object in the list, the content will be displayed in a window.
- To select multiple objects, enable the **Checkboxes** option in the **View** drop-down in the toolbar.
You can also use your system's multi selection functions.

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

Content

- Buttons for executing frequently used functions.
- 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 on 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

- Notifications about new invitations and upcoming events
- Control elements for editing notifications: accept, decline, remind again, delete

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.
- Depending on the app or function, various buttons, icons or input fields are available.

Properties


- You can move an editing window.
- 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 application 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.

Open notification area automatically

Specifies whether the notification area automatically opens when receiving a new notification or email.

Show desktop notifications

Defines whether you will receive a desktop notification for new emails. 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.

Manage deputies

To define deputies for your email conversation or your appointment scheduling, 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.

5 Email

How to start the Email app:

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

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

5.1 Viewing Emails

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

How to display an email:

1. Open an email folder in the folder view.


When having selected the **Inbox** folder and if you are using email tabs, you can select a tab.


To display the number of emails in a folder, hover over the folder name.

2. Click an email in the list. The content of the email will be displayed in the detail view.

- If the **Conversations** option is enabled in the **Sort** drop-down, all emails of a conversation will be displayed as thread.

To open or close an email that is part of a conversation, click on a free area between the sender and the date of receipt.

To open or close all emails in the conversation, click the **Open/close all messages** icon  on the upper right side of the detail view.

- If the email includes a quote from a previous email, you can display the quote by clicking the **Show quoted text** icon .

Options:


- To sort the email list, click on **Sort by** above the list.
The sorting setting will be applied to the selected email folder. You can use different settings for the single folders.
- To combine all emails of a conversation in a single list entry, enable the **Conversations** checkbox in **Sort**.
- In order to select a layout, click on **View** in the toolbar.
- You can open the email in a window by double-clicking on the email in the list.
- When having selected **List** from the **View** drop-down, a list of all emails in the folder will be shown in the display area. If clicking on an email, the email's detail view will be displayed.

Tip: In the email settings, you can define whether a notification sound is to be played for incoming emails.

5.2 Sending Emails



5.2.1 Sending a new email

How to send a new email:

1. Click on **Compose** in the toolbar.
2. Enter the recipients' email 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 email, enter the recipients in the **CC** field.
 - If the recipients are not to see who gets a copy of the email, enter the recipients in the **BCC** field.
4. Enter a subject. Enter the email text.
5. Click on **Send**.

5.2.2 add attachments

How to add attachments to an email in the email editing window:



1. Select the files to be sent as attachment.
 - To send a local file as attachment, click the **Attachments** icon  in the button bar. You can also add an attachment by dragging one or several files from a file browser or from the desktop to the email window.
2. You can remove an attachment if required. To do so hover over an attachment. Click the **Remove attachment** icon .

5.2.3 Replying to emails

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


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

How to reply to an email:

1. Select an email.
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 email list.

To send a new email 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 email.


5.2.4 Forwarding emails

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

- The subject of the email will be entered as the subject of the forwarded email. The subject will be preceded with the text "Fwd: ".
- The email text will be 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



If you forward multiple emails, the selected emails are sent as attachments in eml format.

How to forward an email:

1. Select one or several emails.
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 email list.
3. Select one or more recipients.
4. Fill in the details for sending the email.

5.2.5 Sending an email to appointment participants


How to send an email 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. Click the **More actions** icon  in the pop-up.
 - In the list view, select an appointment with multiple participants. Click the **More actions** icon  in the toolbar.Click on **Send mail to all participants**.
2. Fill in the details for sending the email.

5.3 Adding Email Folders

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

How to create a new email 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 Emails




5.4.1 Marking emails as read or unread

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

- mark single emails as read or unread

- mark all emails of an email folder as read


How to mark an email as unread or read:

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

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


5.4.2 Deleting emails

How to delete an email:

1. Select one or several emails.
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 email list.


Result: The email will be moved to the **Trash** folder.

How to delete all emails of a folder:

1. In the folder view, select the folder which emails 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 email will be moved to the **Trash** folder.

How to recover deleted emails:

1. Open the **Trash** folder in the folder view.
2. Select one or several emails.
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 emails can **not** be recovered. Before permanently deleting an email, make sure you no longer need the email.

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.

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 contacts from different address book and display their data. Depending on the configuration, you have the following options:

- [Displaying an address book's contacts \(p. 27\)](#)
- [Displaying contacts in the address list \(p. 27\)](#)
- [Displaying contacts in the halo view \(p. 28\)](#)

6.1.1 Displaying an address book's contacts

In the folder view, you can open an address book, select specific contacts or display their data.

How to display a contact:

1. Select an address book in the folder view.
Your personal address book named **Contacts** can be found in the folder view below **My address books**.
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.


6.1.2 Displaying contacts in the address list

Note: Depending on the configuration, the address list might not be available.

In the address list, you can simultaneously find and display contacts from multiple address books. You can define the address books to be searched for contacts. The following functions are available:

- search for the name, department, position, phone number, email address
- set a filter for defining the address books to be displayed and selected for the search
- select the address books to be searched

How to display contacts in the global address list:

1. Click the **All Applications** icon  in the menu bar.
Click on **Address list** in the App Launcher.
The *Global address list* window opens. Like editing windows, the window can be moved, minimized and its size can be adjusted.
2. Enter a search term in **Search**.
All contacts that include the search term in the following data will be displayed: name, department, position, phone number, email address
3. You can limit the search result by using the following functions:
 - Enter a term in **Filter** to define the address books to be displayed in **Address list**.
 - In **Address list**, select the address books to be searched.
4. To show a contact's details, click the **Show contact details** icon on the right-hand side. The contact's Halo View will be displayed in a pop-up.





6.1.3 Displaying contacts in the halo view

You can use the halo view in the Email, Calendar or Tasks app to display all relevant information about a contact.

How to display a contact in the halo view:

1. Depending on the app, use one of the following methods:
 - Select an email in the Email 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:

 - a picture if uploaded
 - last name, first name
 - business data, if entered
 - Depending on the configuration: The contact's current availability for calls
 - Depending on the configuration: Icons for communicating with the contact:
 - **Email** . Opens the window for composing an email.
 - **Call** . Opens a menu with functions for calling.
 - **Invite** . Opens the window for creating an appointment.
 - Further contact data, if set:
 - personal data, business data
 - Email addresses. If clicking on an email address, the page for sending a new email is displayed.
 - Business and private phone numbers. If clicking on a number, a function for making a call opens, if available.
 - Business and private addresses. In the address book settings, you can define whether a map service for displaying the address should be used when clicking on an address.
 - Attachments
 - The address book in which the contact is saved
 - Your recent conversations with this contact. If clicking on an email, 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.

6.2 automatically add email addresses to input field

Learn how to automatically add an email address from an address book if an email address is to be entered into the input field when sending an email or inviting participants to an appointment. Depending on the configuration, you have the following options:


- [Automatically adding email addresses from an address book \(p. 29\)](#)
- [Automatically adding email addresses from the address list \(p. 29\)](#)

6.2.1 Automatically adding email addresses from an address book

Note: Depending on the configuration, the window described below might not be available. In case the window is not available, the global address list will be used, see [Automatically adding email addresses from the address list \(p. 29\)](#).

With the *Select contacts* window, you can automatically add email addresses from an address book. You can for example use this function if an email address needs to be entered in the input field when sending an email or inviting participants to an appointment.

How to automatically add email addresses from an address book:

1. Click the **Select contacts** icon in an editing window. 

This icon will be available in the input fields for email addresses, while:

 - selecting the recipients when sending an email
 - adding participants to an appointment or task
 - inviting persons to a share

The *Select contacts* window opens.
2. 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.
3. 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.
4. To automatically insert the email addresses of the contacts selected, click on **Select**.


6.2.2 Automatically adding email addresses from the address list

Note: Depending on the configuration, the address list might not be available. In case the address list is not available, the *Select contacts* window will be used, see [Automatically adding email addresses from an address book \(p. 29\)](#).

In the *Global address list* window you can use various functions for finding and automatically adding email addresses. You can for example use this function if an email address needs to be entered in the input field when sending an email or inviting participants to an appointment. In the *Global address list* window, the following functions are available:

- search for the name, department, position, phone number, email address
- set a filter for defining the address lists to be displayed and selected
- select the address list to be searched

How to automatically add email addresses from the address list:

1. Click the **Select contacts** icon in an editing window. 
This icon will be available in the input fields for email addresses, while:
 - selecting the recipients when sending an email
 - adding participants to an appointment or task
 - inviting persons to a shareThe *Global address list* window opens.
2. Enter a search term in **Search**.
All contacts that include the search term in the following data will be displayed: name, department, position, phone number, email address
3. You can limit the search result by using the following functions:
 - Enter a term in **Filter** to define the address lists to be displayed in **Address list**.
 - In **Address list**, select the address list to be searched
4. Select at least one contact.
The selected contacts will be displayed in a list at the bottom. You can remove single contacts from the list.
5. Repeat steps 1 to 2 to find and select further contacts.
6. To automatically insert the email addresses of the contacts selected, click on **Select**.

6.3 Adding Contacts

6.3.1 Creating a new contact

How to create a new contact:

1. In the folder view, open an address book for which you have the permission 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 email. A vCard attachment per default has the name extension vcf.

How to add a contact from an email's vCard attachment:

1. Select an email with a vCard attachment in the Email application.
2. Click on **Add to address book** in the detail view.

6.4 Editing Contacts or Distribution Lists

Learn how to edit the data of contacts or distribution lists later.

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 will be displayed.
3. Edit the data.
4. Click on **Save**.

6.5 Adding Address Books

6.5.1 Adding personal 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 address book subscriptions

The following options exist:

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

How to manage address book subscriptions:

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 an address book subscription, click on **Refresh** next to a subscription in the display area.
 - To show the folder with the data you have subscribed to, 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 subscriptions 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 to 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 to address book** button .

6.6 Managing Contacts

6.6.1 Sending emails from within an address book

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


How to send an email from within an address book:

1. Select at least one contact or distribution list from the list.
2. Click on **Send email** in the toolbar.
If you have selected a single contact, you can also click the **Email** icon  in the detail view.
3. Fill in the details for sending the email.

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 at least one contact or distribution list from the list.
2. Click on **Invite** in the toolbar.
If you have selected a single contact, you can also click the **Invite** icon  in the detail view.
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**.

6.6.4 Deleting contacts


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

How to delete contacts:

1. Select at least one contact or distribution list from the list.
2. Click on **Delete** in the toolbar.
3. Confirm that you want to delete the items.

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 different views

Learn how to display the appointments of a calendar or several calendars in different views:

How to view an appointment:

1. Select a calendar in the folder view. Make sure the checkbox next to the calendar is enabled.
2. Click on **View** in the toolbar. Select one of the following entries: **Day**, **Work week**, **Week**, **Month**, **List**.
3. If you have selected a calendar view:
 - 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.
 - Click on an appointment in the calendar sheet. The calendar's data is displayed in the pop-up.If you have selected the list view:
 - Click on an appointment in the list. The appointment's data is displayed in the detail view.
 - 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. In the folder view, open a calendar for which you have the permission to create objects.
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, the appointment is saved in your calendar.
3. Enter a subject.
4. To set an appointment's start and end time, use the following options below **Start date** and **Ends on**.
 - Click on a date. 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 location and 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 deputy?

- 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 invite 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. Click the **More actions** icon  in the pop-up.
 - In the list view, select an appointment with multiple participants. Click the **More actions** icon  in the toolbar.Click on **Invite to new appointment**.
2. Complete the details for creating an appointment.

7.2.3 Inviting email recipients to new appointments

If there are several email recipients, all recipients can be invited to a new appointment.

How to invite all email recipients to an appointment:

1. Select an email in the Email 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

Learn how to edit an appointment's data or time later.

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.
You can also double-click on an appointment in the list view. The appointment will be displayed in a window. Click on **Edit**.

When having selected a recurring 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

With calendars you can organize your appointments e.g. by separately saving your business and private appointments. Learn how to create calendars, use appointments from external calendars and set the view for shared 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 have 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 email 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.

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. In the folder view, open a task folder for which you have the permission to create objects.
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

Learn how to edit a task's data later.

Prerequisite: You have the permission to edit 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

With task folders you can organize your tasks, e.g. by separately saving tasks for customers or projects. Learn how to create personal task folders and how to set the view for shared task folders.

8.4.1 Adding personal task folder

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 to 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


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.

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 a file's content

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 toolbar. Select one of those entries: **List**, **Icons**, **Tiles**. To display checkboxes for selecting files, enable **Checkboxes**.
3. In order to display details of a selected file, click on **View** in the toolbar. Enable **File details**.
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**  or **Next**  icon next to the view.

Tips:

- To change the sorting, click on **Sort by** in the navigation bar.
- To filter by specific object types, to select all files or to clear the selection, click on **Select** in the navigation bar.


9.2 Downloading Files or Folder Contents

Learn how to download single files or folder contents to your local device.


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 Drive: Adding Folders

9.3.1 Drive: creating folders

How to create a new folder:

1. In the folder view, open a Drive folder for which you have the permission to create objects.
2. Click on **New** in the toolbar. Click on **Folder**.
In the folder view, you can also click the **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**.

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. In the folder view, open a Drive folder for which you have the permission 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. In the folder view, open a Drive folder for which you have the permission 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 email attachments

You can send the current versions of files as email attachments.



How to send files as an email 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 email edit window, fill in the details to send a new email.

9.5.2 Editing file names


Prerequisite: You have the permission to edit 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.

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 emails, 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 calendars, 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 calendars, 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 calendars, 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**.
- Click the **Open folder view** » or **Close folder view** icon « below the folder view.


How to open or select a folder:

1. If the folder view is closed, open it.
2. A folder in the Email 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.


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 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.

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.




10.2 Sharing Data

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

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 external partners automatically will receive an invitation email.


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 Email 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. Note: The following option will not be available in the Email app.
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**.
Persons with the link can only read the shared data. Other permissions can not be granted for public links.
4. To invite the wanted persons, enter a name or an email 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)**. Make sure the recipient of the public link receives the password.Invitation options
 - To automatically send a message to persons who are invited by you to a shared item, enable **Send notification by email**.

10.2.2 Subscribing to shared or personal email folders

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

How to subscribe to personal or shared email folders:

1. Click the **Settings** icon  on the right side of the menu bar. Click on **Settings**.
2. Click on **Mail** in the sidebar.
3. Click on **Change IMAP subscription** in the display area.
4. In the *Subscribe IMAP folders* window enable 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 **Share / Permissions**.

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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