OX App Suite

Compact Guide

OX App Suite: Compact Guide

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1 About This Documentation

1.1 Who is the Target Group for this Documentation?

This documentation is addressed to the end user.

1.2 Which Contents are Included in the Documentation?

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

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

1.3 Design Elements

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

Buttons

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

Example:

Click on **Compose new email**.

Label

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

Example:

The *Compose new email* page is displayed.

Key labels

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

Example:

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

Links

Links in the text appear in blue.

Example:

Information can be found in 5.2: Sending E-Mails (page 26).

Explanatory text

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

Example:

The following options exist:

- Send a new E-Mail.
- Reply to E-Mails.
- Forward E-Mails.

Step by step instructions

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

Example:

How to reply to an E-Mail:

1. Select an E-Mail in the sidebar.
2. Click on **Reply** in the display area next to the E-Mail header .
3. Enter the E-Mail text.
4. Click on **Send** in the command bar.

Result: The E-Mail is sent.

Tips for making the work much easier

The tips for making work easier refer to actions that are optional e.g., alternatives to an instruction.

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

Example:

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

Malfunction note

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

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

Example:

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

Warning about loss of data or security risks

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

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

Example:

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

2 Getting Started with the Groupware

2.1 Operating Instructions

The following techniques are required:

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

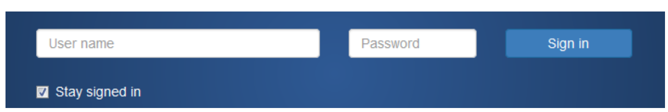
Information on these techniques can be found in your operating system documentation.

2.2 Signing in, Signing out

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

Result: The desktop is displayed. A menu bar at the top of the screen contains functions available in all applications.

- Selecting applications, e.g. Portal, E-Mail, Address book
- Further functions: organizing applications, refreshing data, opening the help section, signing out

At the bottom of the screen several useful bits of information are displayed.

- Your username
- Current date, current time

How to sign out:

1. Click the **System menu** icon on the right side of the menu bar. Click on **Sign out**. The login window will be displayed.
2. If anyone else has access to the machine, close the browser.

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

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

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

3 First Steps

3.1 The User Interface

The user interface includes the following components:

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

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

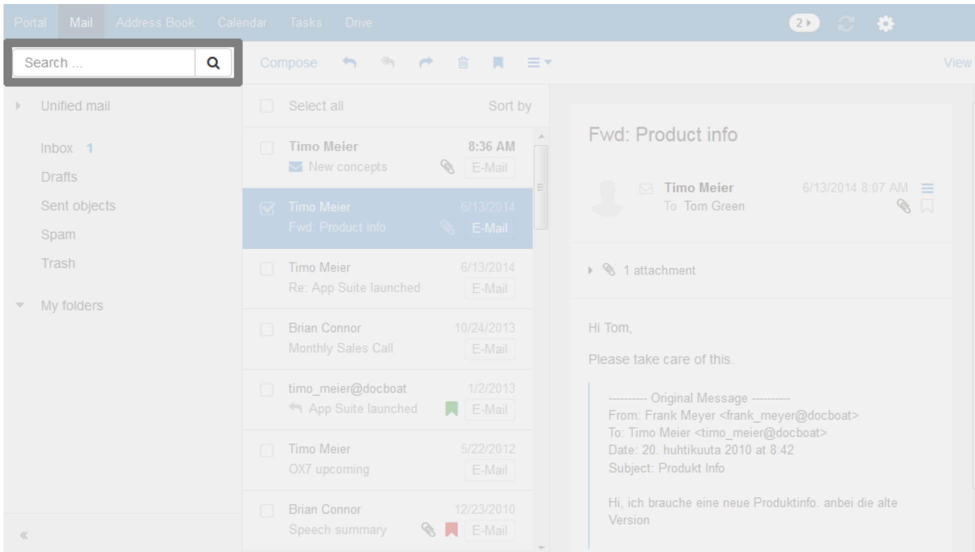
Menu bar

Contains the following icons and buttons:

- Buttons for launching applications like *E-Mail* or *Calendar*
- Depending on the action, additional buttons might be displayed e.g., if composing a new E-Mail or editing an appointment.
- **Unread Badge** icon . The icon notifies you of the number of new objects e.g., unread E-Mails or scheduled appointment invitations. Clicking opens the notification area .
- **Refresh** icon . Reloads objects from the server. Irrespective of this function, objects are refreshed in regular intervals.
- **System menu** icon . Opens a menu with the following entries:
  - *Settings*. Opens a page that allows customizing settings.
  - *My contact data*. Opens a window where you can adjust your personal contact data in the global address book.
  - *Help*. Opens the online help.
  - *Fullscreen*. Switches to fullscreen mode or back to windowed mode.
  - *Sign out*. Signs you out from the groupware.

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

Search bar

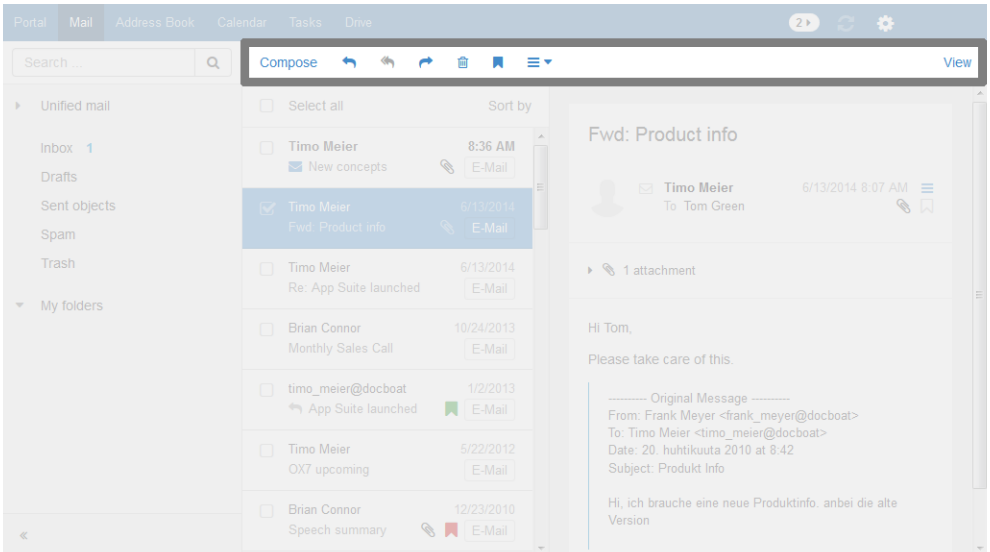


In order to display the search bar, click on **View** in the function bar. Enable **Folder view**. The search bar is located on the left side below the menu bar. It contains the following:

- Input field for the search term
- *Search* icon . Starts a search.

As soon as the search is enabled the folder tree is overlapped by the search functions. The search result is displayed in the list that is shown in the display area. In order to finish the search, click on **Close search**.

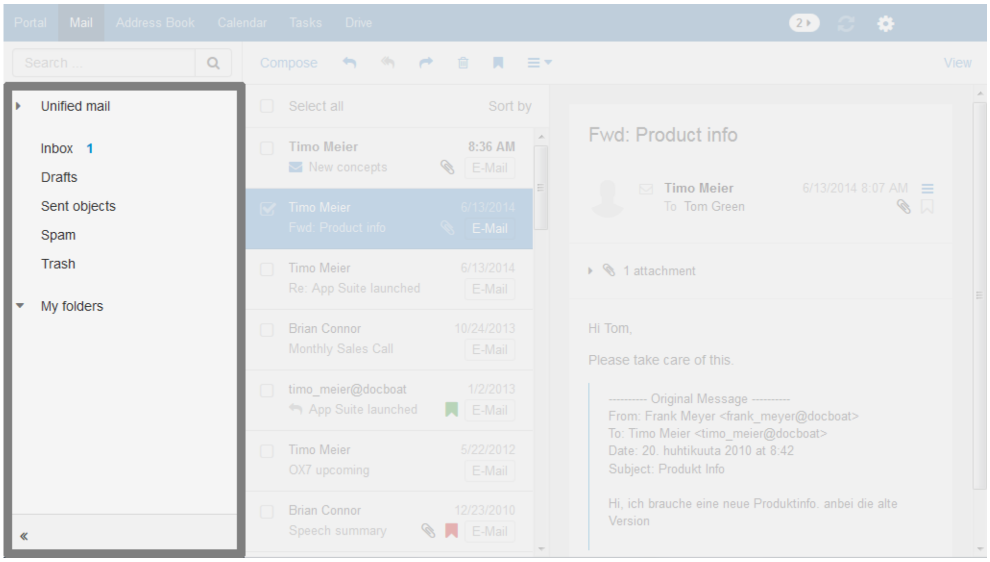
Toolbar



The toolbar is located below the menu bar. It contains the following functions:

- Buttons for creating new objects, e.g. a new E-Mail or a new contact.
  If you do not have the permission to create objects in the current folder, the button is disabled.
- Buttons or icons for editing objects.
- Depending on the app, further app specific buttons or icons might be available.
- *More* 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 tree.

Folder tree



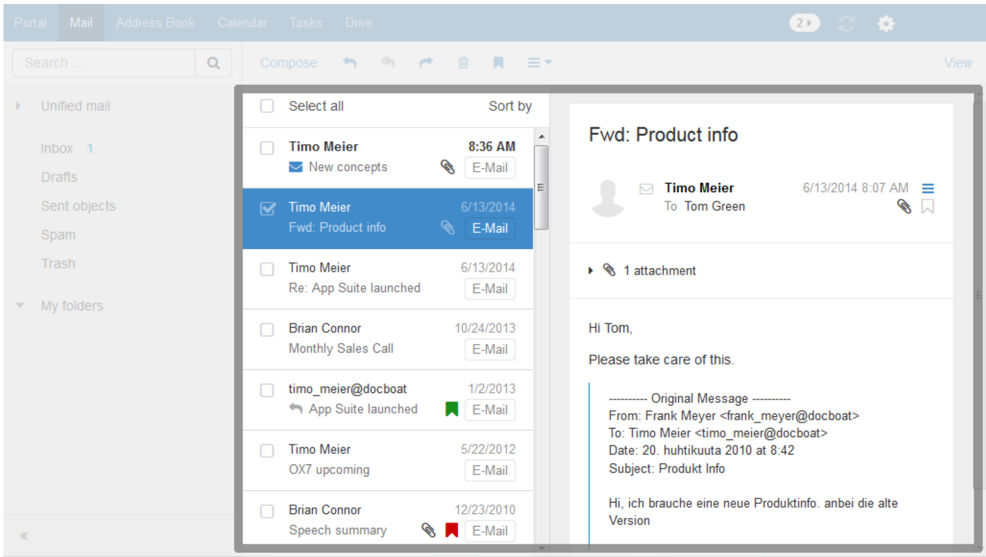
In order to display the folder tree, click on **View** in the function bar. Enable **Folder view**. The following information are displayed in the folder tree:

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

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

  Tip: You can also access the folder-specific actions by right-clicking on a folder.
- Depending on the app, further functions might be available.
- The **Open folder view** icon » or the **Close folder view** icon « at the bottom left side opens or closes the folder tree.

Display area

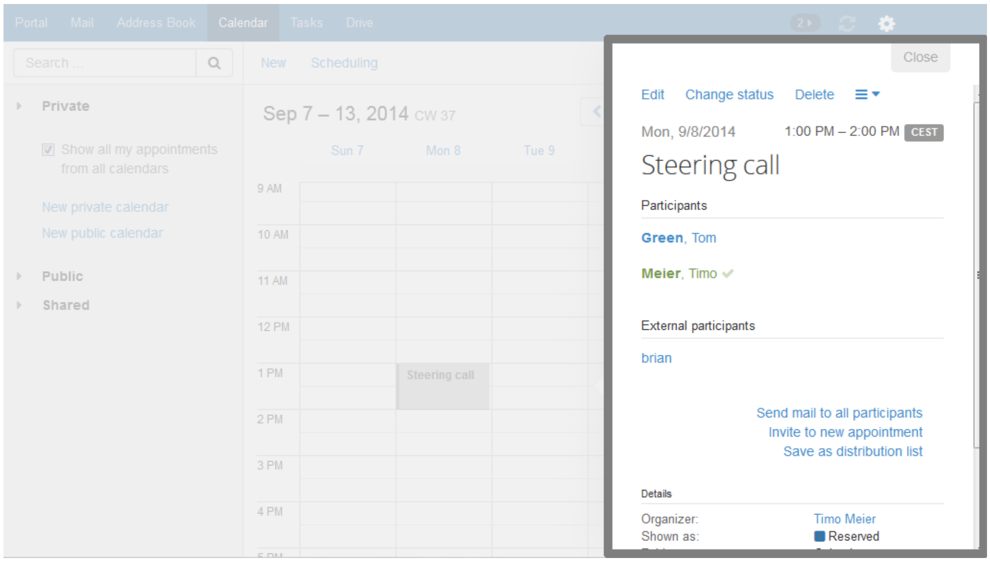


Depending on the app and the view selected, the display area includes the following comonents.

- A list of objects or an icons view of the objects in the selected folder. On top of the list, control elements for selecting or sorting objects are displayed.
- The detail view of the object that you selected in the list.

You can change the view in the display area by using the **View** button in the toolbar. Clicking on an object in the display area opens a pop-up window.

Pop-up

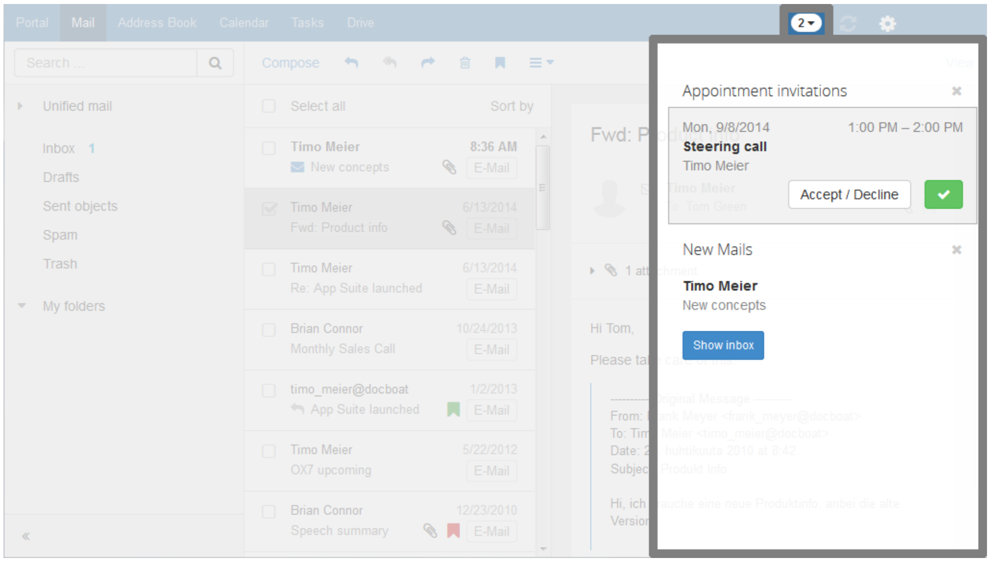


Displays detailed information about an object shown in the display area. In order to open the pop-up, click on a groupware object in the display area. If you read an E-Mail in the display area and click on the name of the sender, the following elements are displayed in the pop-up:

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

Those person related data are called *halo view*. If clicking on a certain element in the pop-up, an additional pop-up might be opened. In order to close a pop-up, click on **Close** in the upper right side. In order to close all pop-ups, click on **Close all**.

Notification area



Displays information about the following objects:

- unread E-Mails
- new appointment invitations
- queued tasks
- tasks with a due date in the past

In order to open the notification area, click the **Unread badge** icon in the menu bar. You can do the following:

- To read a new E-Mail click on it.
- To open the inbox click on **Show Inbox**.
- To confirm new appointments click on the **Confirm** button.
- To hide information about specific objects, click the **Close** icon next to the group.

To close the notification area, click the **Unread badge** icon again.

3.2 Customizing the Basic Settings

How to customize the basic settings:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Basic settings** in the sidebar.
3. Change the settings [17].

The following settings are available.

- Language
- Timezone
- Refresh interval
- Theme
- Default app after sign in
- Automatic sign out
- Automatic opening of notification area
- High contrast theme
- Changing the Password

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

Language

Defines the user interface language.

Timezone

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

Refresh interval

Defines the interval for retrieving new objects from the server.

Theme

Defines the color scheme for the user interface.

Default app after sign in

Defines the application that is displayed after login.

Automatic sign out

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

Automatic opening of notification area

Specifies whether the notification are is automatically opened when receiving a new notification or E-Mail.

High contrast theme

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

Changing the Password

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

3.3 Changing Personal Contact Data

How to change your personal contact data:

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

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

3.4 Changing the Password

How to change your password:

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

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

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

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

3.5 Installing Clients for Workstations or Mobile Devices

You can install the following clients from within the groupware:

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

How to install clients for workstations or mobile devices:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the sidebar, click on **Downloads**.
   Downloads is only visible if the **Advanced Settings** is enabled.
3. In the display area, follow the instructions on downloading the clients.
   Comprehensive installation instructions can be found in the client-specific user guides.

4 Portal

How to launch the *Portal* app:

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

4.1 The *Portal* Components

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

Signed in as

Displays the username that you used for signing in.

***Appointments* widget**

Displays your current appointments. You can do the following:

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

***Inbox* widget**

Displays new E-Mails. You can do the following:

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

***Tasks* widget**

Shows unfinished tasks. You can do the following:

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

***Recently changed files* widget**

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

***User data* widget**

Includes links for the following functions:

- Changing your personal contact data
- Changing your password

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

***Quota* widget**

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

***News* widgets**

Display current messages from different message sources:

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

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

4.2 Customizing the Portal

4.2.1 Changing the widgets' order

You can define the order of the widgets.

How to change the order of the widgets:

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

4.2.2 Removing Portal widgets

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

How to remove a widget:

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

4.2.3 Adding Portal widgets

You can extend the existing widgets by adding new ones.

How to add new widgets:

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

4.2.4 Changing the Portal widgets' settings

How to use the Portal widgets settings:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Portal** in the sidebar.
3. Change the settings [22].

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

The following settings are available.

- **Edit** button
- **Color** button
- **Disable** button
- **Delete** icon
- **Only show widget summary on mobile devices** checkbox

Edit button

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

Color button

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

Disable button

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

Delete icon

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

Only show widget summary on mobile devices checkbox

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

5 E-Mail

How to launch the *E-Mail* app:

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

5.1 Displaying E-Mails

By default, the content of the inbox is displayed. Other E-Mail folders can be opened from within the folder tree. To reduce latency, 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.

How to display an E-Mail:

1. Open an E-Mail folder in the folder tree.
2. In order to quickly find a particular E-Mail, use one of the following methods:
   To find E-Mails by entering a search term, use the search function.
   To sort the E-Mail list, click on **Sort by** above the list. Select a sort criterion from the menu.
3. To combine all E-Mails of a conversation in a single list entry, enable the **Conversations** checkbox in **Sort by**.
4. Click an E-Mail in the list. The content of the E-Mail will be displayed in the detail view. If the E-Mail is part of a conversation, all E-Mails in the conversation are displayed one below the other.

   Note: Depending on the server configuration, very large E-Mails are not displayed completely. In this case, you will receive an E-Mail with a link. In order to completely display the E-Mail, click on the link.

   If you selected **List** from the **View** drop-down in the toolbar, the list is replaced by the detail view of the selected E-Mail. In this case the following functions are available above the detail view.
   To open the list again, click on the **Back** button or icon.
   To display the next E-Mail, click the **View next** icon.
   To display the previous E-Mail, click the **View previous** icon.

   When having selected **Vertical** or **Compact** from the **View** drop-down in the toolbar, you can open an E-Mail in a separate window by double-clicking on the E-Mail in the list.
5. If a conversation is displayed, you can open or close a single E-Mail in the detail view by clicking 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.
6. If the E-Mail includes a quote from a previous E-Mail, you can display the quote by clicking the **Show quoted text** icon .

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 recipient's E-Mail address in the *To* field of the sidebar. Press Enter.

   If there are several recipients, repeat the action. As an alternative, you can enter the name of a distribution list [30].

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

   Tip: While entering the E-Mail address, several matching suggestions are displayed. To accept a suggestion, use one of the following methods:

   Use the scrollbar to browse the list. Click on a suggestion.

   Use the cursor keys to select a suggestion. Press Enter.
3. Enter a subject.
4. Enter the E-Mail text.

   In order to compose the E-Mail in text format, select **Text** below *Text format*.

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

   a. Select the text content.

   b. Click an element in the formatting bar.

   If you use the html format, you can add images from the clipboard.
5. You can use additional functions: send copies, select sender address, add attachments, add signature, add vCard, request delivery receipt or set the priority
6. Click on **Send**.

Result: The E-Mail is sent.

5.2.2 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 are automatically entered as recipients of the reply E-Mail.
- The E-Mail subject is entered in the subject field of the reply E-Mail. The subject is preceded with the text "Re: ".
- The E-Mail text is entered in the forwarded E-Mail. Each line is preceded with the character ">" to indicate that it is a quotation.

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

Result: The E-Mail is sent.

Tip: You can directly reply to an E-Mail by double-clicking the subject in the display area. In the window, enter the E-Mail text. Click on **Send**

5.2.3 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 is entered as the subject of the forwarded E-Mail. The subject is preceded with the text "Fwd: ".
- The E-Mail text is 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

How to forward an E-Mail:

1. Select an E-Mail.
2. Click the **Forward** icon in the toolbar.
   You can also use the **Actions** icon in the detail view.
3. Select one or more recipients. Information can be found in How to send a new E-Mail: (page 26).
4. Enter the E-Mail text. You can use additional functions e.g., E-Mail attachments.
5. Click on **Send**.

5.3 Organizing E-Mails

5.3.1 Marking E-Mails as read or unread

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

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

How to mark an E-Mail as unread:

1. Select a read E-Mail.
2. Click the **More** icon in the toolbar. Click on **Mark as unread** in the menu. If the E-Mail is part of a conversation, all messages received for this conversation are marked as unread.
   You can also use the **Actions** icon in the Detail view or click the icon next to the sender's picture.

How to mark all E-Mails of a folder as read:

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

5.3.2 deleting E-Mails

How to delete E-Mail messages:

1. Select an E-Mail.
2. Click the **Delete** icon in the toolbar.
   You can also use the [Del] or [Backspace] key.
   You can also use the **Actions** icon in the detail view.

How to delete all E-Mails of a folder:

1. In the folder tree, select the folder which E-Mails you want to delete.
2. Click the **Folder-specific actions** icon next to folder name. Click on **Empty folder**.

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

How to recover deleted E-Mails:

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

Result: The E-Mail is moved to the selected folder.

How to permanently delete an E-Mail from 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. Open the *Trash* folder in the folder tree.
2. Select an E-Mail.
3. Click the **Delete** icon in the toolbar.

Result: The E-Mail is permanently deleted.

6 Address Book

How to launch the *Address Book* app:

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

6.1 Displaying Contacts

By default, the contacts in the *Global address book* are displayed. Your personal address book can be found in the folder tree below *Contacts*.

How to display a contact:

1. Open an address book in the folder tree.
2. In order to quickly find the wanted contact, use the following methods:
   In order to only display contacts with certain properties, use the search function.
   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.
4. In order to display another contact, do one of the following:
   Click on another contact in the list.
   Use the cursor keys to browse the list.

6.2 The Halo View

The halo view opens a popup with all relevant information on a contact:

- Addresses, E-Mail addresses, phone numbers
- your current correspondence with this contact
- shared appointments with this contact
- This person's data from social networks like Xing or LinkedIn. You can use the available buttons to open this person's profile.

How to display a contact in the halo view:

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

6.3 Creating contacts

6.3.1 Creating a new contact

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

How to create a new contact:

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

6.3.2 Adding a contact from vCard

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 the attachment's name in the detail view. Click on **Add to address book** in the menu.

6.4 Creating distribution lists

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

How to create a new distribution list:

1. Open an address book in the folder tree.
   Note: Open an address book for which you have the appropriate permissions to create objects.
2. Click on **New** in the toolbar. Click on **Add distribution list**.
3. Enter a name for the distribution list in the **List name** field.
4. Enter a contact's name and E-Mail address.
   Tip: While entering the name, suitable suggestions are displayed. Click on a suggestion to add the name and E-Mail address.
5. Click next to the E-Mail address to add the contact to the distribution list.
6. In order to add further contacts, repeat the previous two steps. In order to remove a contact, click next to the contact.
7. Click on **Create list**.

6.5 Organizing contacts

6.5.1 Sending E-Mails from within an address book

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

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

6.5.2 Inviting contacts to an appointment

How to invite contacts to an appointment:

1. Select a contact or a distribution list from the list.
2. Select **Invite to appointment** from the toolbar.
3. Complete the details for creating an appointment.

6.5.3 Editing Contacts

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

How to edit a contact:

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

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

6.5.4 Deleting Contacts

How to delete a contact:

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

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

Result: The contact is deleted.

7 Calendar

How to launch the *Calendar* app:

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

7.1 Viewing Appointments

7.1.1 Displaying appointments in 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. Open a calendar folder in the folder tree.
3. If you use several personal calendar folders you can define the appointments to be displayed.
   To display all the appointments from all your personal calendars, enable **Show appointments from all private calendars** in the folder tree.
   To only display the appointments in the currently selected calendar, disable **Show appointments from all private calendars**.
4. Click on an appointment in the calendar sheet. The calendar's data is displayed in the pop-up.
5. In order to browse the calendar, use the navigation bar on top of the calendar sheet.

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. Open a calendar folder in the folder tree.
3. If you use several personal calendar folders you can define the appointments to be displayed.
   To display all the appointments from all your personal calendars, enable **Show appointments from all private calendars** in the folder tree.
   To only display the appointments in the currently selected calendar, disable **Show appointments from all private calendars**.
4. Click on an appointment in the list. The appointment's data is displayed in the detail view.
5. To display another appointment, use one of the following methods:
   Click on another appointment in the list.
   Use the cursor keys to browse the list.

7.1.3 How are appointments displayed?

In a calendar view, appointments are displayed in the following colors, depending on the availability:

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

Private appointments are always displayed in gray.

7.2 Creating Appointments

7.2.1 Creating new appointments

How to create a new appointment:

1. Open a calendar folder in the folder tree.
   Note: Open a calendar folder for which you have the appropriate permissions to create appointments.
2. Click on **New** in the toolbar.
3. Enter a subject. If required, enter the location and a description.
4. Set the start and end date of the appointment. For all day appointments, activate **All day**.
5. To get an appointment reminder, select a setting in **Reminder**.
6. You can use additional functions: create recurrence, add other participants or resources, set the availability or add attachments.
7. Click on **Create**.

Tip: As an alternative, you can use one of the following methods:

Select one of the calendar views (*Day*, *Work week*, *Week* or *Month*). In order to display a specific time range, click on the date above the calendar sheet. Double-click on a free area in the calendar sheet.

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

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

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

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

7.2.2 Resolving appointment conflicts

An appointment conflict happens if the following is true:

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

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

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

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

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

7.3 Managing Appointments

7.3.1 Editing appointments

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

How to edit an appointment:

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

1. Depending on the view selected, use one of the following methods:
   Click on an appointment in a calendar view. Click on **Edit** in the pop-up.
   Select an appointment in the list view. Click on **Edit** in the toolbar.
   The appointment data is displayed in a new page.
2. Edit the data.
3. Click on **Save**.

7.3.2 Editing appointments with drag and drop

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

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

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

How to move an appointment to another day:

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

How to change an appointment's time:

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

How to change the start or end of an appointment:

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

7.3.3 Deleting appointments

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

How to delete an appointment:

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

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

Result: The appointment will be deleted.

8 Tasks

How to launch the *Tasks* app:

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

8.1 Viewing Tasks

How to display a task:

1. Open a tasks folder in the folder tree.
2. To quickly find a particular task, use one of the following methods:
   - In order to only display tasks with certain properties, use the search function.
   - To sort the tasks list, click the **Sort** icon↓↑ above the list. Select a sort criterion from the menu.
   - To only display due tasks in the list, click the **Sort** icon↓↑ above the list. Disable **Show done tasks** in the menu.
3. Click on a task in the list. The task's data is displayed in the detail view.
4. To display another task, use one of the following methods:
   - Click on another task in the list.
   - Use the cursor keys to browse the list.

8.2 Creating Tasks

How to create a new task:

1. Open a tasks folder in the folder tree.
   Note: Select a folder for which you have the permission to create tasks.
2. Click on **New** in the toolbar.
3. Enter a subject. Enter a description, if needed.
   To view the complete form, click on **Expand form**.
4. Set the task's start and due date.
5. In case you want to be reminded of the task, select a setting in the **Remind me** drop-down field.
6. You can use additional functions: creating recurring tasks, adding participants and resources, adding attachments, adding details
7. Click on **Create**.

How to use further functions when creating a task:

Prerequisite: The dialog for creating a new task is selected.

1. In order to create a recurring tasks, enable **Repeat**. The current repetition parameters are displayed.

   To set the repetition parameters, click on the value. Examples can be found in the questions about appointments and tasks.

   In order to hide the recurrence parameters, click the **Close** icon . To show them again, click on **Edit**.
2. In order to add a further participant, enter the participant's E-Mail address in the input field below *Participants*. Click the icon .

   Tip: While entering the E-Mail address, several matching suggestions are displayed. To accept a suggestion, use one of the following methods:

   Use the scrollbar to browse the list. Click on a suggestion.

   Use the cursor keys to select a suggestion. Press Enter.

   In order to remove a participant, click the icon next to the name.

   In order to add multiple participants, you can enter the name of a distribution list [30].
3. In order to add attachments to the task, click on **Upload file**. Select one or multiple files.

   In order to remove an attachment, click the **Delete** icon .

   Tip: You can also add an attachment by dragging a document from a file browser or from the desktop and dropping it in the task window.
4. In order to add details like billing information, click on **Show details**. Enter the data required.

8.3 Managing Tasks

8.3.1 Editing tasks

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

How to edit a task:

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

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

8.3.2 Marking tasks as done

How to mark a task as done:

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

1. Select a task from the list.
2. Select **Mark as done** from the toolbar.

8.3.3 Changing a task's due date

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

How to change a task's due date:

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

1. Select a task from the list.
2. Click on **Change due date** in the toolbar. Select an entry.

8.3.4 Deleting tasks

How to delete a task:

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

1. Select a task 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 launch the *Drive* app:

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

9.1 Viewing Files

By default, the content of your personal files folder is displayed. The folder is named *My files*.

How to display a file:

1. Click on **View** in the toolbar. Select one of the following entries: **List**, **Icons**, **Squares**.
2. If the folder tree is closed, click on **View** in the toolbar. Enable **Folder view**.
   Open a folder in the folder tree.
3. Click on a file in the display area.

Tip: In order to quickly find a certain file, use the search function.

9.2 Opening Files and Displaying Contents

Depending on a file's content, different functions are available:

- display or download a file's content [41]
- display the contents of documents in Office file formats [42]
- play multimedia files [42]

9.2.1 Displaying a file's content

In order to display a file's content, use one of the following methods:

- Plain text files or images in common file formats can be displayed or downloaded in the browser.
- You can download files and open them with a suitable software.
- There are special functions available for Documents [42] and multimedia files [42].

How to display a file's content:

1. Open a folder containing files, in the folder tree.
2. Click on a file in the detail view. In the popup, click on **Open**.
   If having selected a document, click on **View** in the popup. You can also click on the document's preview.
3. Depending on the file's content, the result varies:
   Plain text files and images in common file formats are directly displayed in the browser.
   Documents are displayed in the *Document Viewer*.
   For other files a system window opens that allows to download the file.

Tip: Learn how to download a certain file version by reading Section 9.4.6, “Working with versions”.

How to download a file:

1. Open a folder containing files, in the folder tree.
2. Click on a file in the detail view. In the popup, click on **Download**
   You can also select one or several files. Click the **Download** icon in the toolbar.
3. Complete the steps for downloading the file.

Tip: Learn how to download a certain file version by reading Section 9.4.6, "Working with versions".

9.2.2 Displaying the contents of documents

You can display the contents of documents that have the following Office formats:

- Texts
- Spreadsheets
- Presentations
- PDF documents

As soon as the document is displayed, you can use further functions e.g., printing the document or sending it in an E-Mail.

How to display the contents of documents:

1. Open a folder containing documents.
2. Click on a file in the detail view. In the popup, click on **View**. You can also click on the document's preview. The *Document Viewer* shows the content of the document.

   The *Document Viewer* includes the following components:

   - A toolbar contains the following functions.
     - Icons for downloading, printing, sending.
     - Navigation elements for browsing the document.
     - **View** menu for adjusting the document's display size.
     - **Close** icon for finishing the *Document Viewer*
   - Th display area below the toolbar shows the document's content.
3. To browse in documents with multiple pages, use the icons in the centre of the toolbar.

   As an alternative you can use the side panel for browsing. In order to open the side panel, click on **View** in the toolbar. Enable **Show side panel** in the menu.

   To increase or decrease the display size click on **View** in the toolbar. Select an entry from the menu.
4. To download or print the document or to send it in an E-Mail, use the icons in the toolbar.

   To copy text into the clipboard, select the text with the mouse. Use the key combination that is common on your system.

   To edit the document, click the **Edit document** icon in the toolbar. Information on editing documents can be found in the Documents user documentation.
5. To close the *Document Viewer*, click the **Close** icon ✖ on the right side of the toolbar.

9.2.3 Playing multimedia files

You can use the following multimedia functions:

- view images as a slideshow
- play audio files
- play video files

How to view images as a slideshow:

1. Open a folder with images, in the folder tree.
2. Click the **Start slideshow** icon in the function bar.

How to play audio files:

1. Open a folder with audio files, in the folder tree.
2. Click the **Play audio files** icon in the function bar. A player window opens. To play the audio files in the background, click on **Minimize**.

   If you play audio files in the background, the **Play** icon is displayed in the menu. To display the player window again, click the icon.

How to play video files:

Note: Which video formats are supported depends on the browser being used.

1. Open a folder with video files, in the folder tree.
2. Click on a video file in the detail view. In the popup, click on **Open**. The video is played in the browser window.

9.3 Creating Files

A file includes the following components:

- one or several file versions
- an optional description

How to create a new file:

1. Open a folder in the folder tree.

   Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click on **New** in the toolbar. Click on **Upload new file**.
3. In the *Upload new files* window, click on **Select file**. Select one or several files.
4. You can enter file information in the *Description* field.
5. Click on **Save**.

Tip: You can also create a new file by dragging a file from your desktop to the *Drive* app window and drop it in the upper part.

9.4 Managing Files

9.4.1 Sending files as a link

How to send a link to a file:

1. Click on a file in the detail view. In the pop-up, click the **More** icon. Click on **Send as internal link** in the menu.

   You can also select one or several files. Click the **More** icon in the toolbar. Click on **Send as internal link** in the menu.
2. In the *Compose new E-Mail* page, complete the details for sending the E-Mail.

9.4.2 Sending files as E-Mail attachments

How to send the current version as an E-Mail attachment:

1. Click on a file in the detail view. In the pop-up, click the **More** icon . Click on **Send by mail** in the menu.

   You can also select one or several files. Click the **More** icon in the toolbar. Click on **Send by mail** in the menu.

   Note: Depending on the server configuration, you might not be able to send files by E-Mail, if they exceed a certain file size. In this case, use the function for sending them as link.
2. In the *Compose new E-Mail* page, complete the details for sending the E-Mail.

9.4.3 Editing file names

You can edit a file name.

How to edit the file name:

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

1. Click on a file in the detail view. In the pop-up, click the **More** icon . Click on **Rename** in the menu.
2. Edit the file name. Note the name extension.
3. Click on **Rename**.

9.4.4 Editing descriptions

You can edit a file's description.

How to edit a file's description:

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

1. Click on a file in the detail view. In the pop-up, click the **More** icon . Click on **Edit description** in the menu.
2. Edit the description.
3. Click on **Save**.

9.4.5 Deleting files

How to delete a file:

1. Click on a file in the detail view. In the pop-up, click on **Delete**.

   You can also select one or several files. Click the **Delete** icon in the toolbar.
2. Confirm that you want to delete the file.

Result: The file will be deleted.

How to recover deleted files:

1. Open the *Deleted files* folder in the folder tree.
2. Select one or several files.
3. Click the **More** icon in the toolbar. Select **Move** from the menu.
4. Select a folder in the *Move* window. Click on the *Move* button.

Result: The files are moved to the selected folder.

How to permanently delete a file:

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

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

Result: The files are permanently deleted.

9.4.6 Working with versions

There are the following options for working with versions:

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

How to open or save the current version:

Click on a file in the detail view. In order to open the version, click on **Open** in the popup. In order to save the version, click on **Download** in the popup.

Tip: If there is a document preview displayed you can also save the current version by dragging the preview to the desktop and dropping it there.

How to upload a new version:

1. Click on a file in the detail view. In the pop-up, click on **Upload new version**. Select a file.
2. Enter a version comment.
3. Click on **Upload**.

Tip: You can also upload a new version by dragging a file from your desktop to the file's display area and drop it in the lower part.

How to open or save a certain version:

1. Click on a file in the detail view. In the popup, click on **Show version history**. Click on a version's name. A menu opens.
2. In order to open the version, click on the **Open** menu entry. In order to save the version, click on the **Download** menu entry.

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

1. Click on a file in the detail view. In the popup, click on **Show version history**. Click on a version's name. A menu opens.
2. Click on the **Make this the current version** menu entry .

How to delete a certain version:

1. Click on a file in the detail view. In the popup, click on **Show version history**. Click on a version's name. A menu opens.
2. Click on **Delete version** in the menu.

10 Organizing Data

10.1 Folders

10.1.1 Folder types

The following folder types exist in the folder tree:

- Personal folders
  - Personal folders contain your E-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 are located in *Private* in the folder tree.
  - Your personal file folder is named *My files*.
- 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.
  - Public folders are located in the folder tree in *Public*. Here you will find the global address book with the contact data of all users.
  - The public file folders are located in *Public files*.
- Shared folders
  - Shared folders have been shared with you by other users with read or write permission.
  - Shared folders are located in the folder tree in *Shared*.
  - Shared file folders are located in *Shared files*.

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

10.1.2 Navigating within the folder structure

How to open or close the folder tree:

Use one of the following methods:

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

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

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

How to open a certain folder:

1. If the folder tree is closed, open it.
2. To view a folder's subfolders, click on the arrow next to the folder name.
3. To open a folder, click on it.

Result: The folder's content is displayed

10.1.3 Creating folders

You can create any number of subfolders in a personal folder. To create subfolders in a shared or public folder, you need to have the required permissions [49]. Depending on the app, you can create folders or subfolders.

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

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

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

1. In the folder tree, click on **New private folder** or on **New public folder**.
2. Enter a name in the *New folder* window. Click on **Add folder**.

10.1.4 Renaming folders

You can rename subfolders in your personal folders. For other folders you need the appropriate permissions [49].

How to rename a folder:

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

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

10.1.5 Moving folders

You can move subfolders from your personal folders. For other folders you need the appropriate permissions [49].

How to move a folder:

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

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

10.1.6 Deleting folders

You can delete subfolders in your personal folders. For other folders you need the appropriate permissions [49].

How to delete a folder:

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

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

Result: The folder and its objects are permanently deleted.

10.2 Permissions

Permissions define what a user can do with a particular folder and its contents. Individual users have certain folder permissions. In order to allow another user access to one of your private folders, you have to grant the user certain permissions for that folder. This is called *sharing* the folder. Please note the following:

- You cannot share specific items, only complete folders.
- Think about the permissions needed by another user. If a user e.g. should only read folder contents, write permission for that folder is not needed.

A description of permissions can be found in 10.2.1: Which permissions can be granted? (page 49).
A listing of preset permissions for specific folders can be found in in 10.2.2: Permissions for folders that already exist (page 50) and in 10.2.3: Permissions for new folders (page 50).
Information on granting permissions can be found in 10.2.4: Sharing folders (page 51).

10.2.1 Which permissions can be granted?

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

- Owner
- Administrator
- Author
- Guest

Owner

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

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

Administrator

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

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

Author

An author is allowed to change objects that already exist, to create and edit new objects, and to create subfolders.

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

Guest

A guest is allowed to read objects that already exist but not to modify them. The guest is not allowed to create subfolders or objects there.

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

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

- Folder permissions
  - New folder
  - create objects
  - create objects and subfolders
- Object permissions, read
  - no read permissions
  - read own objects
  - read all objects
- Object permissions, edit
  - no edit permissions
  - edit own objects
  - edit all objects
- Object permissions, delete
  - no delete permissions
  - delete own objects
  - delete all objects
- Administrative rights
  - Yes
  - No

10.2.2 Permissions for folders that already exist

You have the following permissions for folders that already exist:

- You are the owner of your personal folders.
- You are allowed to create folders and objects in public folders.
- You are allowed to view folders and read objects in the *Global Address book*.

10.2.3 Permissions for new folders

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

- in a personal folder [50]
- in a public folder [50]
- in a shared folder [50]

If you create a new folder in a personal folder:

- You are the owner.
- Other users inherit the permissions which they have for the parent folder.

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

- You are the owner.
- Other users will get no rights. You have to set the permissions for the new folder. If you then create new subfolders in this folder, the permissions for this folder are inherited by the new subfolders. Information on granting permissions can be found in 10.2.4: Sharing folders (page 51).

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

- The user who shared the folder, gets Admin permissions for the new folder.
- You are the owner.
- Other users will get the same rights as for the parent folder.

10.2.4 Sharing folders

In order to share data with other users, share one or more folders. You can share a folder by granting other users particular rights for the folder. The following options exist:

- grant rights for a folder,
- change the rights for a folder,
- grant rights by applying a user role, and
- delete the rights for a folder.

How to grant permissions for a folder:

1. Select a folder in the folder tree.

   Note: You need to have administrative rights for this folder.
2. Click the **Folder-specific actions** icon next to folder name. Click on **Permissions**. The *Folder permissions* window shows the current permissions for this folder.
3. At the bottom, enter a user's name. Click the icon . The user gets the preset permissions.
4. Click on a user's permission to change it. Example settings can be found in Questions about data organization and team work.
5. If required, repeat these steps to grant additional permissions.
6. Click on **Save**.

Tip: A shared folder is marked with the **Shared** icon . If clicking the icon, the *Folder permissions* window opens.

How to change the folder permissions:

1. Select a folder in the folder tree.

   Note: You need to have administrative rights for this folder.
2. Click the **Folder-specific actions** icon next to folder name. Click on **Permissions**. The *Folder permissions* window shows the current permissions for this folder.
3. Click on a permission to change it. Example settings can be found in Questions about data organization and team work.

   Note: You cannot change the administrative rights of a personal folder.
4. Click on **Save**.

How to grant permissions by applying a user role:

1. Select a folder in the folder tree.

   Note: You need to have administrative rights for this folder.
2. Click the **Folder-specific actions** icon next to folder name. Click on **Permissions**. The *Folder permissions* window shows the current permissions for this folder.
3. Click on **Apply role** next to a user name. Select a User role [49] from the menu.
4. Click on **Save**.

How to remove a user's folder permissions:

1. Select a folder in the folder tree.

   Note: You need to have administrative rights for this folder.
2. Click the **Folder-specific actions** icon next to folder name. Click on **Permissions**.
3. In order to remove a user's permissions, click the icon next to the user's name.
4. Click on **Save**.

11 Questions and Answers

General questions

How can I change my password?

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

Why can particular buttons or input fields not be found?

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

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

How am I notified about new E-Mails or appointment invitations?

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

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

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

Questions about E-Mails and contacts

How can I send an E-Mail to multiple addresses at once?

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

- Enter all recipients in the input fields **To...**, **Copy to...** or **Blind copy to...**. Use the autocomplete function to more easily enter the addresses. This FAQ list provides an explanation of the differences between the input fields.
- If you regularly send E-Mails to the same group of people, create a distribution list in the *Address Book* app and add the E-Mail addresses to the distribution list. Information can be found in Creating distribution lists (page 30).

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

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

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

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

Questions about tasks, calendars, and appointments

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

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

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

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

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

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

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

How do I use the calendar or tasks recurrence settings?

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

Starts on 07-01-2013

Daily

The event is repeated every 2 days.

The series ends after 5 appointments or tasks.

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

Starts on 08-01-2013

Weekly

The event is repeated every week on Tuesday, Friday.

The series never ends.

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

Starts on 09-01-2013

Weekly

The event is repeated every 2 weeks on Wednesday.

The series ends on 27-03-2013.

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

Starts on 04-02-2013

Monthly

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

The series ends after 12 appointments.

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

Starts on 29-11-2013

Yearly

The event is repeated every last Friday in November.

The series never ends.

Questions about data organization and team work

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

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

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

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

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

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

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

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

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

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

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

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