Groupware
Compact Guide

Groupware: Compact Guide

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1 About This Documentation

1.1 Who is the Target Group for this Documentation?

This documentation is addressed to the end user.

1.2 Which Contents are Included in the Documentation?

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

Note: This document describes some essential groupware functions. 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 28).

Explanatory text

Text that describes several functions or options is written in list form.
Example:
The following options exist:

- Send new E-Mails
- 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
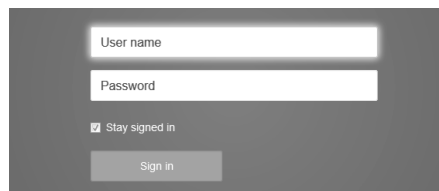
Information on these techniques can be found in your operating system documentation.

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.

How to sign out:

1. Click the **System menu** icon ▤. Click on **Sign out**. The login window will be displayed.
   Depending on the groupware configuration, there is a **Sign out** icon ⏻ .
2. If anyone else has access to the machine, close the browser.

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

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

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

3   First Steps

3.1   The User Interface

The user interface includes the following components:

- A menu bar on the top.

  Depending on the groupware configuration, there is a header bar above the menu bar. It displays the software title and your username.

- On the left side below the menu bar the search bar is displayed. It can be enabled or disabled together with the folder tree.
- The Folder tree can be activated on the left side.
- On the right side below the menu bar a 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
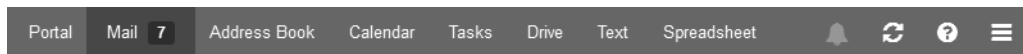
Contains the following icons and buttons:

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

  Next to the **E-Mail** button, the number of unread E-Mails in your personal E-Mail folders are displayed.

- 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.
- **Help** icon . Opens a context related help page. Depending on the current app, the respective help page from the online help is displayed. You can also open the online help from the system menu.

  Tip: Some dialog windows also include the help icon. If clicking on it, the respective help for the dialog window context is displayed.

- **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.
  - *Sign out*. Signs you out from the groupware.

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

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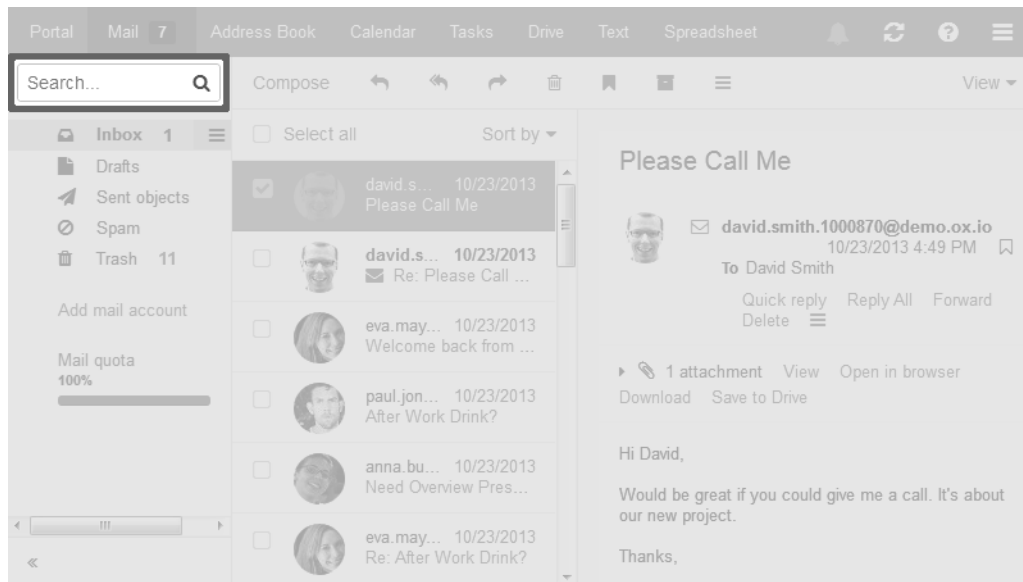
In order to display the search bar, click on **View** in the toolbar. Enable **Folder view**. The search bar is located on the left side below the menu bar. It contains the following:

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

The search result is displayed in the display area.

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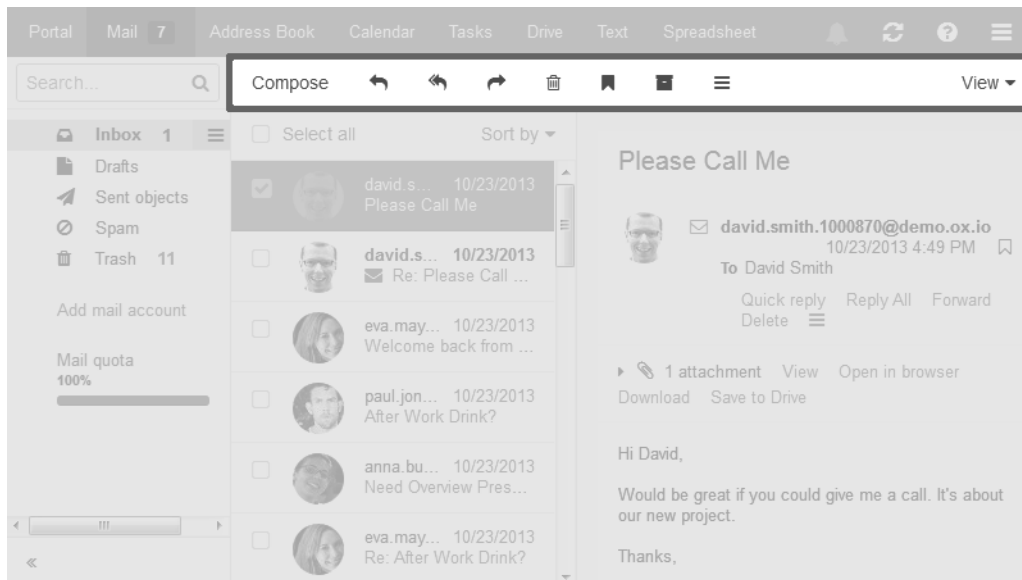
The toolbar is located below the menu bar. It contains the following functions:

- Buttons for creating new objects, e.g. a new E-Mail or a new contact.
- 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 tree.

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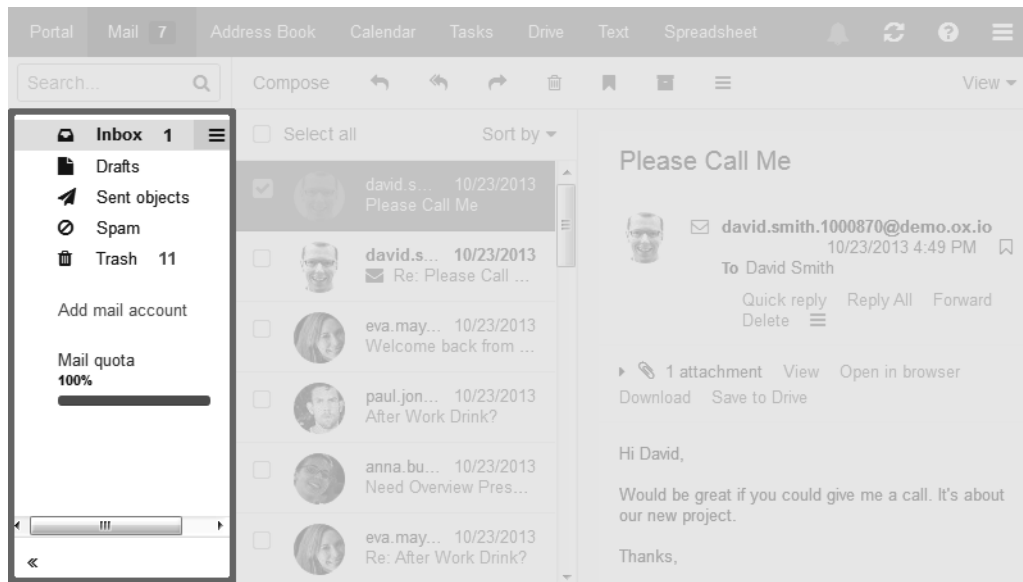
In order to display the folder tree, click on **View** in the toolbar. Enable **Folder view**. The following information are displayed in the folder tree:

- 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
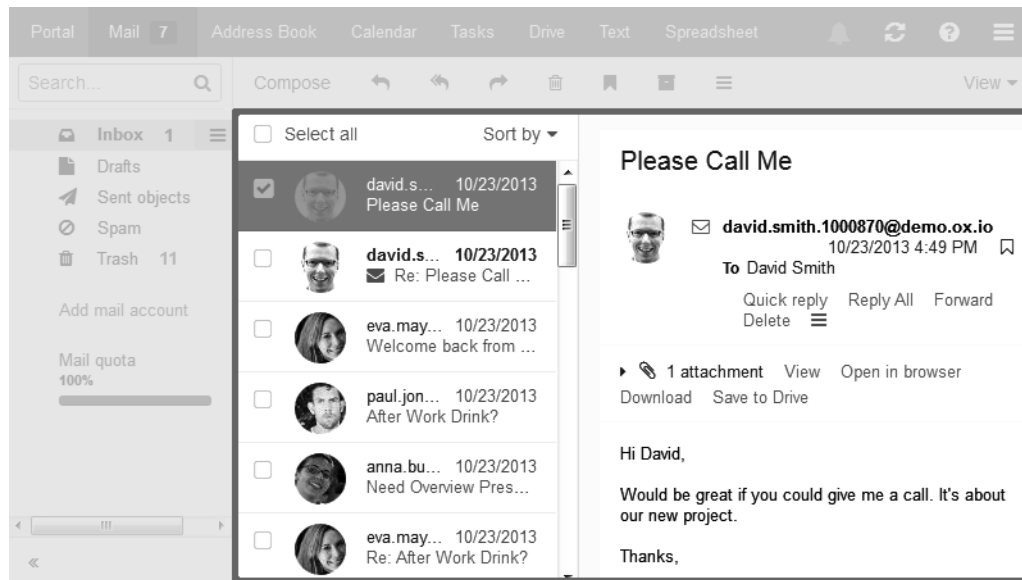
Depending on the app, the display area includes the following components.

▪ A list of objects. On top of the list, control elements for selecting or sorting objects are displayed. The details of the object selected in the list, are displayed in a detail view.

▪ An icon view of objects. Clicking on an object opens a pop-up window. The object's details are displayed in the pop-up.

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

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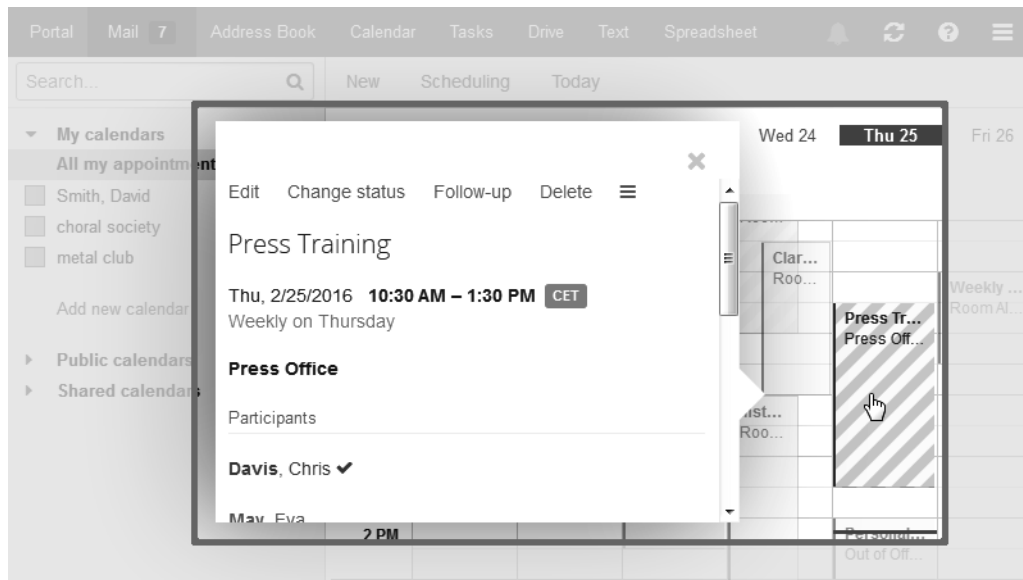
Shows an object's details. In order to open the pop-up, click on a groupware object in the display area. If you read an E-Mail in the display area and click on the name of the sender, the following elements are displayed in the pop-up:

▪ buttons for certain actions, e.g. copying the sender's contact data to a folder

▪ the sender's contact data

▪ relevant information, e.g. your shared appointments or your E-Mail conversation with the sender

▪ Information about this person from social networks. You can use the available buttons to open this person's profile.

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

Notification area
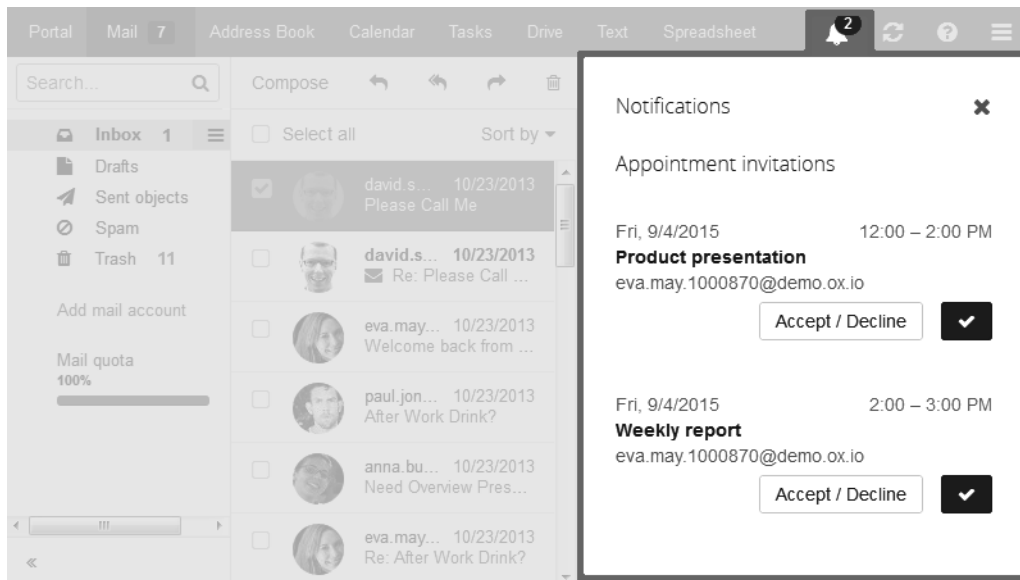
Displays information about the following objects:

- 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 on the right side of the group. 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 on the right side of 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 [19].

The following settings are available.

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

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

Language

Defines the user interface language.

Timezone

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

Refresh interval

Defines the interval for retrieving new objects from the server.

Theme

Defines the color scheme for the user interface.

High contrast theme

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

Default app after sign in

Defines the application that is displayed after login.

Automatic sign out

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

Automatic opening of notification area

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

Show desktop notifications

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

My contact data button

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

Change password

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

3.3   Changing Personal Contact Data

How to change your personal contact data:

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

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

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

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

3.4   Changing the Password

How to change your password:

   Note: Depending on the groupware's configuration the procedure for changing the password might differ from 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   Manually Downloading and Installing Clients and Apps

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

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

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

How to install clients for workstations or mobile devices:

1. Click the **System menu** icon▤ on the right side of the menu bar. Click the **Settings** menu item.

2. In the sidebar, click on **Downloads**.

3. In the display area, follow the instructions on downloading the clients.

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

3.6   Using a Wizard to Set Up Clients and Apps

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

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

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

How to use the wizard:

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

4 Portal

How to launch the *Portal* app:

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

4.1 The *Portal* Components

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

Signed in as

Displays the username that you used for signing in.

Appointments **widget**

Displays your current appointments. You can do the following:
- If clicking on an appointment, a pop-up opens. The pop-up shows the appointment data.
- If clicking on a participant an additional pop-up opens.
- In order to close a pop-up, click on **Close** in the top right corner.

Inbox **widget**

Displays new 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 [25].

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 🗑
- **Reduce to widget summary** checkbox

Edit button

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

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.

Reduce to widget summary checkbox

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

How to display an E-Mail:

1. Open an E-Mail folder in the folder tree.
2. In order to select a layout, click on **View** in the toolbar. Enable an entry below *Layout*.
3. To sort the E-Mail list, click on **Sort by** above the list. Enable an entry.

   Note: To reduce latency when loading the E-Mail list, only a certain percentage of the E-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.

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

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

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

   - When having selected **Vertical**, **Compact** or **Horizontal** 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.

   - When having selected **List** from the **View** drop-down in the toolbar, the display area contains a list of all E-Mails in the folder. If clicking on an E-Mail, the E-Mail's detail view is displayed. The following functions are available bove the detail view, :

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

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

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

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

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. Press Enter.

   If there are several recipients, repeat the action. As an alternative, you can enter the name of a dis-tribution list [32].

   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.

   Tip: You can define that the recipients can only see your E-Mail address, not your full name. To do so, proceed as follows:

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

   Enable **Hide names**.

3. Enter a subject.

4. Enter the E-Mail text.

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

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

   Select the text content.

   Click an element in the formatting bar.

5. If you use the html format, you can insert images into the text. To do so, proceed as follows:

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

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

   In order to remove an image from the text, select the image. Press the delete key on your keyboard.

6. You can use additional functions: send copies, select sender address, add attachments, add signature, add vCard, request delivery receipt or set the priority

7. Click on **Send**.

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 **Reply all** button in the detail view.

3. Enter the E-Mail text. You can use additional functions e.g., E-Mail attachments.

4. Click on **Send**.

Tip: In order to reply to an E-Mail with as little effort as possible, click on **Quick reply** in the detail view.

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 **Forward** button in the detail view.

3. Select one or more recipients. Information can be found in How to send a new E-Mail: (page 28).

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 or read:

1. Select an E-Mail.

2. Click the **Actions** 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☰ or click the **Read** icon✉ in the detail view. The icon changes to the **Unread** icon ✉ .

3. In order to mark this E-Mail as read, analogously do the same.

How to mark all 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 the 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 **Delete** button 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 the folder name. Click on **Empty folder**.
   You can also select two or more E-Mails from the list. Click on **Delete all messages** in the detail view.

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

How to recover deleted E-Mails:

1. Select the *Trash* folder in the folder tree.
2. Select an E-Mail.
3. Click the **Actions** 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. Select 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.

How to permanently delete the content of the Trash folder:

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

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

Result: The objects in the trash are permanently deleted.

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

6.2   The Halo View

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

How to display a contact in the halo view:

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

6.3   Adding Contacts

6.3.1   Creating a new contact

In order to create a new contact, you must 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 **Add attachments** below *Attachments*. Select one or multiple files.

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

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

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 **Name** field.

4. Enter a participant's E-Mail address in the *Participants* field.

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

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

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

   In order to add further contacts, repeat this step. In order to remove a contact, click 🗑 next to the contact.

5. 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. Click on **Invite** in 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.
   In order to view all your appointments from all calendar folders, open the **All my appointments** folder.
3. Click on an appointment in the calendar sheet. The calendar's data is displayed in the pop-up.
4. In order to browse the calendar, use the navigation bar on top of the calendar sheet.
   In order to display the time frame with the current day, click on **Today** in the toolbar.
   Information on displaying appointments can be found in How are appointments displayed? (p. 35)

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

7.1.3 How are appointments displayed?

In a calendar view, the appointment display is defined by the following details:
- The color scheme set: classic colors, dark colors, custom colors
- Your availability displayed during the appointment duration: Booked, Tentative, Absent or Free
- Your appointment confirmation status: Accepted, Tentative, Declined
- Visibility of the appointment's subject and description: Private or visible for other users
The display is distinguished by the colors, icons and different shadings.

Display for the color schemes Classic colors or Dark colors

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

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

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

- Accepted appointments are displayed in the color of the availability
- Tentatively accepted appointments are marked with the text addition *Tentative*.
- Declined appointments are displayed in light gray with crossed subject.
   Tip: In the calendar settings, you can define whether declined appointments are displayed.

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

Display for the color scheme Custom color

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

- Tentative: Selected color with small diagonal stripes
- Free: Selected color with broad diagonal stripes
- Booked: Selected color
- Absent: Selected color
   Tip: You can use a color of your choice for *Absent*

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

- Accepted appointments are displayed in the color and pattern of the availability
- Tentatively accepted appointments are displayed in light gray.
- Declined appointments are displayed in light gray with crossed subject.
   Tip: In the calendar settings, you can define whether declined appointments are displayed.

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

7.2   Creating Appointments

7.2.1   Creating new appointments

How to create a new appointment:

1. Open a calendar folder in the folder tree.
2. Click on **New** in the toolbar.
3. Enter a subject. If required, enter the location and a description.
   If you want to create the appointment in another calendar folder, click on the folder name next to **Calendar** at the top. Select a calendar folder.
4. Set the start and end date of the appointment. For all day appointments, activate **All day**.
   In order to display the time in different time zones, click on the timezone button next to the time. You can set frequently used time zones as favorites in the calendar settings.
5. To get an appointment reminder, select a setting in **Reminder**.
6. You can use additional functions: create recurrence, add other participants or resources, set the availability, assign colors, 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. In the calendar sheet double-click on a free area or drag open an area ranging from the beginning to the end of the new appointment.

In order to create an all day appointment, you have the following 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 sort the tasks list, click the **Sort** icon↓↑ above the list. Select a sort criterion from the menu.

   To only display due tasks in the list, click the **Sort** icon↓↑above the list. Disable **Show done tasks** in the menu.
3. Click on a task in the list. The task's data is displayed in the detail view.

   You can open the task in a separate window by double-clicking on the contact in the list.
4. To display another task, use one of the following methods:
   - Click on another task in the list.
   - Use the cursor keys to browse the list.

8.2 Creating Tasks

How to create a new task:

1. Open a tasks folder in the folder tree.

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

   To view the complete form, click on **Expand form**. The following optional functions are available.

   Set the task's start and due date.

   In case you want to be reminded of the task, select a setting in the **Remind me** drop-down field.

   You can use additional functions: Creating recurring tasks, adding participants or groups, adding attachments, adding details.
4. Click on **Create**.

8.3 Managing Tasks

8.3.1 Editing tasks

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

How to edit a task:

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

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

8.3.3   Changing a task's due date

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

How to change a task's due date:

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

1. Select a task from the list.
2. Click on **Due** in the 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 Displaying Files and Folders

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

- display [41] a file's content
- hold [42] presentations in familiar Office formats or in the PDF format.
- download [43] a folder's files or contents

9.1.1 Displaying a file's content

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

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

How to display a file's content:

1. Open a folder containing files.

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

   In order to display details of a selected file, click on **View** in the toolbar. Enable **File Details**. If selecting multiple files by using the checkboxes, details about the last selected file are displayed.

3. To change the sorting, click on **Sort by** in the navigation bar. Enable an entry.

   In order to display specific object types only, click on **Select** in the navigation bar. Enable an entry below *Filter*.

4. Use one of the following options to open a file in the *Viewer*:
   - Double-click on a file in the display area.
   - Select one or several files in the display area. Click the **View** icon 👁 in the toolbar.

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

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

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

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

9.1.2   Holding a presentation

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

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

How to locally hold a presentation:

1. Open a folder containing presentations.

2. Select a presentation in the display area. Click the **Present** icon ▣ in the toolbar.

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

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

   You can use the icons on the right side of the toolbar to adjust the sheet size.

3. In order to locally start the presentation, click on **Start presentation** in the toolbar. Select **Start local presentation**.

   During the presentation, the following functions are available.

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

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

   > If clicking the icon **Toggle fullscreen**, ▣ the fullscreen mode is activated You can use the [esc] key or the function bar at the bottom of the screen to leave the fullscreen mode.

4. In order to end the presentation, click on **End presentation** in the toolbar.

How to hold a remote presentation:

1. Open a folder containing presentations.

2. Select a presentation in the display area. Click the **Present** icon ▣ in the toolbar.

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

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

   You can use the icons on the right side of the toolbar to adjust the sheet size.

3. Send the url of the selected presentation to the users who should take part in the presentation. The users have to open the url in their browser.

   If clicking the **Show participants** icon ▣ the users who remotely take part in the presentation are shown in the sidebar.

4. Click on **Start presentation** in the toolbar. Select **Start remote presentation**.

   During the presentation, the following functions are available.

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

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

   > If clicking the icon **Toggle fullscreen**, ▣ the fullscreen mode is activated You can use the [esc] key or the function bar at the bottom of the screen to leave the fullscreen mode.

5. In order to end the presentation, click on **End presentation** in the toolbar.

9.1.3   Downloading files or folder contents

The following options exist:
- Download one or several files.
- You can download the complete content of a folder as zip archive.

How to download files:

1. Open a folder containing files.

2. Select one or several files in the display area. Click the **Download** icon ⬇ in the toolbar.
   You can also use the **Download** button in the *Viewer*.

3. Complete the steps for downloading the file.

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

How to download the complete content of a folder:

1. Select the folder containing the content to be downloaded in the folder tree.

2. Click the **Folder-specific actions** icon ☰ next to the folder name. Click on **Download entire folder**.

3. Complete the steps for downloading the folder. The folder's content is saved as a zip archive.

9.2   Creating Files or Folders

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

How to add new files:

1. Open a folder.
   Note: Open a folder for which you have the appropriate permissions to create objects.

2. Click on **New** in the toolbar. Click on **Add local file**.

3. Select one or several files in the *Upload file* window.
   Click on **Open**. The display area shows the current progress status.
   In order to cancel the process, click on **File Details** at the bottom right side of the display area. Click on **Cancel** next to a file name in the *Upload progress* window.

Tip: You can continue working in the groupware during the upload process.

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

How to create a new folder:

1. Open a folder.
   Note: Open a folder for which you have the appropriate permissions to create objects.

2. Click on **New** in the toolbar. Click on **Add new folder**.

3. Enter a name in the *Add new folder* window. Click on **Add**.

9.3   Managing Files

9.3.1   Sending files as a link

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

How to send links to files:

1. Select one or several files in the display area. Click the **Actions** icon≡ in the 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.

9.3.2   Sending files as E-Mail attachments

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

How to send files as an E-Mail attachment:

1. Select one or several files in the display area. Click the **Actions** icon≡ in the toolbar. Click on **Send by mail** in the menu.
   You can also use the **Actions** icon▤ .

2. On the *Compose* page, complete the details for sending the E-Mail.

9.3.3   Editing file names

You can edit a file name.

How to edit the file name:

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

1. Select a file in the display area. Click the **Actions** icon≡ in the toolbar. Click on **Rename** in the menu.

2. Edit the file name in the *Rename* window. Note the name extension. Click on **Rename**.

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

9.3.4   Creating or editing descriptions

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

How to create or edit a file's description:

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

1. Select a file in the display area. If no details are displayed, click on **View** in the toolbar. Enable **File Details**.

2. In order to add a description, click on **Add a description**. In order to edit a description, double-click on the description.
   Enter a new text or change the existing one. Click on **Save**.

You can also use the function in the sidebar of the *Viewer*.

9.3.5   Deleting files

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

- delete files. The files are moved to the *Trash* folder.
- Recover deleted files from the *Trash* folder.
- Permanently delete files from the *Trash* folder. You can also permanently delete all items in a folder by emptying the trash.
  Warning: A file deleted in the *Trash* folder can not be recovered.

How to delete a file:

1. Select one or several files in the display area. Click the **Delete** icon 🗑 in the toolbar.
You can also use the **Actions** icon ▤ .

2. Confirm that you want to delete the selected files.

Result: The selected files are deleted.

How to recover deleted files:

1. Open the *Trash* folder.

2. Select one or several files.

3. Click the **Actions** icon ≡ in the 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 *Trash* folder.

2. Select one or several files.

3. Click the **Delete** icon 🗑

4. Confirm that you want to delete the files.

Result: The files are permanently deleted.

How to permanently delete the content of the Trash folder:

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

1. Select the *Trash* folder in the folder tree.

2. Click the **Folder-specific actions** icon ▤ next to the folder name. Click on **Empty folder**.

3. Confirm that you want to empty the folder.

Result: The objects in the trash are permanently deleted.

9.3.6   Working with versions

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:

1. Select a file in the display area. Click the **Download** icon ⬇ in the toolbar.

2. Complete the steps for opening or downloading.

How to upload a new version:

1. Select a file in the display area. If no sidebar is displayed, click on **View** in the toolbar. Enable **File Details**.

2. Click on **Upload new version** in the sidebar. Select a file.

3. Enter a version comment.

4. Click on **Upload**.

You can also use the function in the sidebar of the *Viewer*.

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

How to open or save a certain version:

1. Select a file in the display area. If no sidebar is displayed, click on **View** in the toolbar. Enable **File Details**.

2. Click the icon ▶ next to *Versions* in the sidebar. The list of versions is displayed.
   Click on a version. Click the **Download** menu item.

3. Complete the steps for opening or downloading.

You can also use the function in the sidebar of the *Viewer*.

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

1. Select a file in the display area. If no sidebar is displayed, click on **View** in the toolbar. Enable **File Details**.

2. Click the icon ▶ next to *Versions* in the sidebar. The list of versions is displayed.
   Click on a version. Click on the **Make this the current version** menu entry .

You can also use the function in the sidebar of the *Viewer*.

How to delete a certain version:

1. Select a file in the display area. If no sidebar is displayed, click on **View** in the toolbar. Enable **File Details**.

2. Click the icon ▶ next to *Versions* in the sidebar. The list of versions is displayed.

3. Click on a version. Click on **Delete version** in the menu.

You can also use the function in the sidebar of the *Viewer*.

9.4 Sharing

By sharing files or folders with read or edit access in the Drive app, you can co-operate with other users or external partners. There are the following options:

▪ Share files or folders for other users or external partners with read or edit access.

▪ Access files or folders shared with you by other users.

▪ Get an overview of your shares by displaying them on an overview page.

▪ Manage your shares by adding new users, removing users or changing permissions.

Notes:

▪ The following descriptions show how to share files and folders. In case you want to share E-Mails, contacts, appointments or tasks, use the methods described in 10.3: Sharing (page 56).

- When sharing items, internal users or external partners are granted certain permissions for the shared data. Information on permissions can be found in 10.2: Permissions (page 54).

9.4.1   Sharing files and folders

There are the following options:

- You can share a file or folder with read access by creating a public link.

  You can give this link to internal users or external partners. Everyone who gets this link can view the file or the folder content.

- Invite internal users or external partners per E-Mail to a share. You define which permissions are granted for the share.

  The invitation E-Mail contains notes for accessing the share. If an external partner accesses the share, the partner will automatically be logged in as guest user.

  Note: The invitation E-Mail is exclusively sent in html format.

Note: In order to share objects, you need to have administrator permissions.

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

1. Select a folder in the folder tree. Select an object in the display area.

    Note: Select a single object. Multiple objects can not be shared together in a public link.

2. Click the **Share** icon 👥 in the toolbar. Click on **Get a link**.

    The window for sharing objects will be opened. It contains a public link for a read access to the share.

3. You have the following options:

    In order to directly send the link per E-Mail, enter the respective E-Mail addresses. You can enter a message for the recipients.

    Per default, the data are shared with read access for an unlimited time. To set a time limit for the access to the shared data, enable **Expires in**. Select a time range.

    To protect the access with a password, enable **Password required**. Enter a password. If you send the public link per E-Mail, the E-Mail contains the password.

4. Click on **Done**.

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

1. Select a folder in the folder tree. Select one or several objects in the display area.

2. Click the **Share** icon 👥 in the toolbar. Click on **Invite people**.

    A window opens. Existing permissions will be shown as a list.

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

    If required, enter a message.

4. To edit the permissions, you have the following options.

    To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.

    To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu.

5. If you share a folder, you can transfer the folder's permissions to all existing or newly created subfolders of this folder. To do so, enable **Apply to all subfolders**.

6. Click on **Save**.

9.4.2   Accessing shared data

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

How to access objects shared by other users:

1. Click on **Shared files** in the folder tree.

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

   Tip: To see the permissions that have been granted for the shared folder, click the **Folder-specific actions** icon▤ . Click on **Existing shares**.

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.

9.4.3   Displaying own shares

To get an overview of your shares, you can display all your shares as a list. In addition, there are the following options:

▪ You can sort the list by different criteria.
▪ You can display the content of a share's parent folder.
▪ You can edit your shares.

How to display your shares:

1. Click on **My shares** in the folder tree.

   The folders and files shared by you are displayed in the detail view. For each share a row with the following details is displayed.

   ▪ An icon indicates the share's object type: file or folder.
   ▪ The share's name and folder path. To open a folder, click on a path entry.
   ▪ Three icons in different colors indicate whether an object has been shared for specific users.
      ▫ The icon 👤 indicates whether the object has been shared for internal users.
      ▫ The icon 👤+ indicates whether the object has been shared for guest users.
      ▫ The icon 🔗 indicates whether the object has been shared by using a public link.
   ▪ The share's creation date.

2. You can do the following:

   To sort the shares list, click on **Sort by** above the list. Select an entry.

   To display the content of a share's parent folder, click on a path entry in the list.

9.4.4   Managing own shares

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

▪ edit the existing permissions, e.g. by changing the read permission for a certain user into write permissions
▪ add new permissions by granting permissions to an additional user
▪ remove existing permissions for certain users
▪ remove all existing permissions for all users

How to edit existing permissions:

1. Click on **My shares** in the folder tree.
2. Select a share in the detail view. Click on **Edit share** in the toolbar. A window opens. It displays the granted permissions for each user.
3. Use the following methods:

   To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.

   To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu.

   Note: You cannot change the administrative rights of a personal folder.

   Note: Permissions can not be changed for public links.
4. Click on **Save**.

How to add new permissions:

1. Click on **My shares** in the folder tree.
2. Select a share in the detail view. Click on **Edit share** in the toolbar. A window opens. It displays the granted permissions for each user.
3. Enter an E-Mail address in *Add people*. The E-Mail address will be added to the list as internal user, group or guest. Preset permissions are granted.
4. Click on **Save**.

How to remove permissions for single users:

1. Click on **My shares** in the folder tree.
2. Select a share in the detail view. Click on **Edit share** in the toolbar. A window opens. It displays the granted permissions for each user.
3. In order to remove a user's permissions, click the **Actions** icon≡next to the user's name. Click on **Revoke access** in the menu.
4. Click on **Save**.

How to remove all permissions:

1. Click on **My shares** in the folder tree.
2. Select a share in the detail view. Click on **Revoke access** in the toolbar.

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 can be found below *My address books*, *My calenders*, *My tasks*, *My files* in the respective app.
- Public folders
  - Public folders contain contacts, appointments, and documents that are of common interest to all users. Each user can create public folders and share them with other users.
  - The public folders for contacts, appointments, tasks, and files can be found below *Public address books*, *Public calenders*, *Public tasks*, *Public files* in the respective app.
- Shared folders
  - Shared folders have been shared with you by other users with read or write permission.
  - The shared folders for contacts, appointments, tasks, and files can be found below *Shared address books*, *Shared calenders*, *Shared tasks*, *Shared files* in the respective app.

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

1. If the folder tree is closed, open it.
2. To view a folder's subfolders, click on the arrow next to the folder name.
3. Click on a folder. The folder's items are displayed in the detail view.
   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 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 [54]. Depending on the app, there are different ways of creating folders.

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

1. Select the folder in which you want to create the new subfolder in the folder tree.

   Note: Select a folder for which you have the permission to create subfolders.

2. Click the **Folder-specific actions** icon▤ next to the folder name. Click on **Add new folder**.

3. Enter a name in the *Add new folder* window. Click on **Add**.

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

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

1. In the folder tree, click on **Add new folder**.

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

10.1.4 Renaming folders

You can rename subfolders in your personal folders. For other folders you need the appropriate permissions [54].

How to rename a folder:

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

1. In the folder tree select the folder that you want to rename.

2. Click the **Folder-specific actions** icon▤ next to the folder name. Click on **Rename**.

3. Edit the name or enter a new name. Click on **Rename**.

10.1.5 Moving folders

You can move subfolders from your personal folders. For other folders you need the appropriate permissions [54].

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 the folder name. Click on **Move**.

3. Select a folder in the *Move folder* window. Click on *Move*.

10.1.6 Deleting folders

You can delete subfolders in your personal folders. For other folders you need the appropriate permissions [54].

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 the folder name. Click the **Delete** button.

3. Confirm that you want to delete the folder.

Result: The folder and its objects are permanently deleted.

10.2   Permissions

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

- A description of the permissions can be found in 10.2.1: Which permissions can be granted? (page 54).
- A listing of preset permissions for specific folders can be found in in 10.2.2: Permissions for folders that already exist (page 55) and in 10.2.3: Permissions for new folders (page 55).

You have the following options to set permissions:

- share [56] groupware data like E-Mails, addresses, calendars, tasks
- share [46] files and folders in the *Drive* app

10.2.1 Which permissions can be granted?

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

- Administrator
- Viewer
- Reviewer
- Author

You can change the preset permissions by granting detailed permissions.

Administrator

A folder's administrator owns all permissions for 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

Viewer

A viewer can read all existing objects. A viewer has not other permissions.

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

Reviewer

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

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

Author

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

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

Detailed permissions

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

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

10.2.2 Permissions for folders that already exist

You have the following permissions for folders that already exist:
- You are the administrator 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 [55]
- in a public folder [55]
- in a shared folder [55]

If you create a new folder in a personal folder:
- You are the administrator.
- In the *E-Mail* app and the *Drive* app, other users inherit their permissions for the parent folder. In the other apps, other users do not inherit permissions.

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

If you create a new folder in the shared folder of another user:
- The user who shared the folder is the administrator of the new folder.
- You are the author of the new folder.
- Other users will get the same rights as for the parent folder.
Note: You need to have the permission to create objects in the shared folder.

10.3 Sharing

By sharing groupware data like E-Mails, contacts, appointments and tasks, you can co-operate with other users or external partners. There are the following options:

▪ Share data for other users or external partners.

  You can share groupware data with other users by granting read or edit access. External partners can only get read permissions.

▪ Access data shared with you by other users.

▪ Manage your shares by adding new users, removing users or changing permissions.

Notes:

▪ The following descriptions show how to share E-Mails, contacts, appointments or tasks. E-Mails can only be shared with internal users, not with external partners. In order to share files and folders in the *Drive* app, use the methods described in 9.4: Sharing (page 46).

▪ When sharing items, internal users or external partners are granted certain permissions for the shared data. Information on permissions can be found in 10.2: Permissions (page 54).

10.3.1 Sharing data

There are the following options:

- You can share data with read access by creating a public link.

  You can give this link to internal users or external partners. Everyone who gets this link can view the data.

  You can not create a public link for E-Mail folders.

- Invite internal users or external partners per E-Mail to a share. You define which permissions are granted for the share for internal users.

  The invitation E-Mail contains notes for accessing the share. If an external partner accesses the share, the partner will automatically be logged in as guest user.

  Note: The invitation E-Mail is exclusively sent in html format.

Be aware of the following restrictions.

- In order to grant rights for a folder to another user, you have to have the administrator right for that folder.

- You can not share your personal *Inbox* folder. In order to grant other users access to your E-Mail messages, share an E-Mail folder that is located below your *Inbox* folder. Other users have to subscribe to this E-Mail folder then.

- You have the exclusive rights for your personal calendar, contacts, and tasks folders. You can not grant administrator rights for these folders to other users.

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

1. Select a folder in the folder tree.

2. Click the **Folder-specific actions** icon▤ next to the folder name. Click on **Get a link**.

   The window for sharing objects will be opened. It contains a public link for a read access to the share.

3. You have the following options:

   In order to directly send the link per E-Mail, enter the respective E-Mail addresses. You can enter a message for the recipients.

   Per default, the data are shared with read access for an unlimited time. To set a time limit for the access to the shared data, enable **Expires in**. Select a time range.

   To protect the access with a password, enable **Password required**. Enter a password. If you send the public link per E-Mail, the E-Mail contains the password.

4. Click on **Done**.

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

1. Select a folder in the folder tree.

2. Click the **Folder-specific actions** icon▤ next to the folder name. Click on **Invite people**.

   A window opens. Existing permissions will be shown as a list.

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

   If required, enter a message.

4. To edit the permissions for internal users, you have the following options.

   To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.

   To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu.

5. Click on **Save**.

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

In order to view the public link again, use the function for editing permissions.

Similar actions

10.3.2 Accessing shared data

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

How to access data shared by other users:

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

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

   Tip: To see the permissions that have been granted for the shared folder, click the **Folder-specific actions** icon▤ . Click on **Existing shares**.

2. Open the folder to display its contents.

3. Select one or several objects. Use the function bar entries.

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

10.3.3 Managing own shares

In order to organize own shares, you can do the following:
- edit the existing permissions, e.g. by changing the read permission for a certain user into write permissions
- add new permissions by granting permissions to an additional user
- remove existing permissions for certain users

How to edit existing permissions:

1. Select a folder in the folder tree.

2. Click the **Shared** icon ♣ next to the folder name. The window for adjusting the permissions opens.

3. Use the following methods:

   To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.

   To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu.

   Notes:

   You cannot change the administrative rights of a personal folder.

   Permissions can not be changed for public links.

   Guests only get read permissions. You can not change this permission.

4. Click on **Save**.

How to add new permissions:

1. Select a folder in the folder tree.

2. Click the **Shared** icon ♣ next to the folder name. The window for adjusting the permissions opens.

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

4. Click on **Save**.

How to remove permissions for single users:

1. Select a folder in the folder tree.

2. Click the **Shared** icon ♣ next to the folder name. The window for adjusting the permissions opens.

3. In order to remove a user's permissions, click the **Actions** icon≡next to the user's name. Click on **Revoke access** in the menu.

4. Click on **Save**.

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 **Actions** 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 32).

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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