Groupware

User Guide

Groupware: User Guide

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1 About this Documentation

The following information will help you make better use of the documentation.

- This documentation's target group and contents
- Which design elements are used?
- What terminology is used in the documentation?

1.1 Target Groups, Contents

This documentation is addressed to the end user.

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.

If this documentation contains descriptions of functions that are not available in your installation, please contact your administrator or host. As the groupware's software has a modularised structure consisting of individual applications, it is possible to purchase additional applications or functions through upgrades.

The contents of this documentation are also available in the on-line help.

1.2 Design Elements

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

Buttons

- Buttons or functions that can be clicked are highlighted in **bold**.
- Example:
  Click on **Compose**.

Label

- Labels for user interface elements like the names of windows or input fields are highlighted in *italics*.
- Example:
  The *Compose* window 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 5.4: Sending email messages (Seite 67).

Explanatory text

- Text that describes several functions or options is written in list form.
- Example:
  The following options are available:
  - Send new E-Mail messages
  - Reply to E-Mail messages
  - Forward E-Mail messages

Step by step instructions

- Instructions are shown as a numbered list. If the instruction only consists of one step or several alternative steps, numbering is not required.
- Example:

How to reply to an E-Mail:

1. Select an E-Mail.
2. Click the **Reply to sender** icon in the tool bar.
   You can also use one of the following methods:
   - Click on the **Reply all** button in the detail view.
   - Use the context menu in the E-Mail list.
3. Fill in the details for sending the E-Mail.

Tips for making the work much easier

- Tips for making work easier refer to actions that are optional e.g.: alternatives to an instruction.
- A tip is introduced with the word Tip:.
- Example:
  Tip: You can also add an attachment by dragging and dropping a document from a file browser or from the desktop to the E-Mail window.

Note:

- A note indicates actions that can not be executed in the current situation. A note helps to avoid handling errors.
- A note 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-Mail messages **cannot** be recovered. Before permanently deleting an E-Mail, make sure you no longer need the E-Mail.

1.3 Terminology

Account	An account or a user account is an access permission to a computer system, e.g. to the groupware server. To get access, a user has to log in with the user name and the password. Based on the account, the computer system identifies the single users. This allows assigning specific properties to a user, like access permissions or settings. Also see: Accounts (p. 249)
App	An application is a groupware component that provides certain functions. Example: With the *E-Mail* application you can send, receive and organise E-Mail messages.
Distribution list	A distribution list consists of a distribution list name and a number of E-Mail addresses of internal users or external partners. You can create and edit your own distribution lists. Other users cannot see your distribution lists. Distribution lists can be used as follows: ▪ send an E-Mail to multiple contacts ▪ add internal or external participants to an appointment or a task ▪ grant permissions to multiple users or guests by inviting them to a share Depending on the configuration, specific distribution lists are predefined for all users. Also see: Creating Distribution Lists (p. 116)
Domain	A domain is the address used to open a page on the Internet. Example: *www.example.com*. A domain is often also referred to as web address or Internet address. Also see: Using a whitelist (p. 256)
Elements	Elements of the user interface. Example: windows, labels, buttons.
Email thread	An E-Mail thread is an E-Mail conversation The E-Mail thread includes the original E-Mail and all replies. All E-Mail messages in an E-Mail thread have the same subject. The current E-Mail corresponds to the last reply. Also see: The E-Mail list (S. 61)
External participant	A person that is not a user but that participates in an appointment or task.
Function	An action performed by the user. Example: sending an email, deleting an appointment.
Global address book	Contains the contact data for all internal users. The users can edit their own personal data in the global address book.
Group	A group consists of a group name and a number of internal users. Groups can be used as follows: ▪ add to an appointment or task ▪ grant permissions by inviting to a share

	Depending on the configuration, specific groups are predefined. Depending on the groupware configuration, users can get the permission to create additional groups. Also see: Managing Groups (p. 169)
Groupware	The software described in this documentation.
Guest	A person who received an invitation to a share by another user or has been added to an appointment or task as an external participant. Each guest user belongs to the *Guests* group. This group cannot be changed or deleted.
Internal email account	Your Groupware E-Mail account You will automatically get this account. You cannot delete this account.
Objects	Objects are created and organised by the user. Examples: E-Mail messages, contacts, appointments, tasks, documents, files, folders, address books, calendars
Participant	A user invited to an appointment or task.
Resource	A resource consists of a resource name, an E-Mail address and an optional description. Resources can be used as follows: ▪ Add to an appointment. You can only add resources that are not used for other appointments. ▪ Resource examples: conference room, beamer, car Depending on the configuration, specific resources are predefined. Depending on the groupware configuration, users can get the permission to create additional resources. Also see: Managing Resources (p. 170)
Session	A session is a connection between a client, e.g. a browser, an E-Mail client or a smartphone app and a server, e.g. the groupware server. A session starts with the login and ends with the logout. Also see: Displaying or terminating sessions (p. 257)
Tabs	Tabs provide an easy and simple way of keeping the *Inbox* folder neat. With tabs, incoming E-Mail messages are saved separated by sender in the *Inbox* folder. Depending on the configuration, specific tabs are predefined. You can set additional tabs according to your needs. Tabs can only be used in the *Inbox* folder. If you need additional storage options, use the folder view to create E-Mail folders. Also see: Working with tabs (S. 78)
User	A person working with the groupware. Each user has a username and a password. Each groupware user belongs to the *default group*. Those users are also called internal users.
User interface	This refers to the groupware user interface. The user interface consists of individual elements.
Whitelist	A whitelist is a list of domain names or E-Mail addresses that you trust. Also see:

Using a whitelist (p. 256)

2 Getting Started With the Groupware

The following information will help you get started with the groupware.

- Which functions does the groupware provide?
- What skills are required for handling the groupware?
- How do I sign in or sign out?

2.1 Groupware Definition

Learn which applications are part of the groupware. Get an initial insight into the tasks that can be accomplished using the applications.

Portal
Your information centre for scheduled appointments, new E-Mail messages or messages from messaging platforms.

- Get an overview of current appointments and new E-Mail messages.
- Read current messages from your favorite messaging source.
- Follow news from your social networks.

Learn more [47].

E-Mail
Send, receive and organise your E-Mail messages.

- Besides your internal E-Mail account use external E-Mail accounts that you have set up with other providers.
- Find E-Mail messages with the help of several search criteria. Follow E-Mail threads.
- Use E-Mail folders to organise your E-Mail messages. Co-operate with your team by sharing selected E-Mail folders.
- Use the other applications by creating a new contact from an E-Mail address or creating a new appointment from an iCal attachment.

Learn more [55].

Address Book
Organise and maintain your private and business contacts.

- Use the global address book to communicate with internal participants. Create personal address books to keep an overview of your contacts.
- Use address books to organise your contacts. Co-operate with your team by sharing selected address books.
- Use the contacts from your social networks. This enables you to use the groupware as a central collection point for your contacts.
- Work with external partners by sending contact data in vCard format or sharing address books.

Learn more [103].

Calendar
Keep an overview of your private and business appointments.

- Use individual or recurring appointments to schedule meetings and activities.
- Use calendars to organise appointments. Specify the team members who can access selected calendars.
- Use the team view functions to find windows of free time and to check whether resources like rooms or devices are available.
- When scheduling appointments with external participants the iCal functions ensure automated invitation management.

Learn more [127].

Tasks
Schedule and organise your activities.

- Use the due date to organise your tasks. Use the reminder for tasks that are due.
- Manage your team by delegating selected tasks to others.
- Use the tasks folders to organise your tasks. Specify team members who can access selected tasks.
- Use the recurring tasks functions to keep track of recurring activities.

Learn more [173].

Drive
Use the file store to centrally manage information or to share information with others.

- Save any files, notes or Internet links. Give your team read or write access to selected document folders.
- Create and edit simple text files.
- Send individual files as E-Mail attachments or links.
- Provide information to external partners by sharing document folders.

Learn more [195].

Folders and permissions
Folders and their permissions play an important role in exchanging information with other users. Each groupware object is saved in a specific folder. The folder view helps to manage folders and permissions.

- Use personal folders for sorting your E-Mail messages, contacts, appointments, tasks, and Infostore items.
- Support your team by sharing certain folders with read or write access.
- Benefit from the information of others by using objects in public or shared folders for your work.

Learn more [227].

2.2 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.

2.3 Signing in, Signing out

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

How to sign in to the server:

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

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

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

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

How to sign out:

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

   Depending on the configuration, there is a **Sign out** icon on the upper right side of the menu bar.
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

What you should do initially.

- Get familiar with the common user interface.
- Get familiar with the keyboard input.
- Customise the basic settings.
- Check your personal contact data. Change or complete it, if required.
- For security reasons you should change your password.
- Define whether you want to receive a notification for new events like receiving a new E-Mail or appointment invitation.
- In order to access your groupware data from local clients or apps, you can install clients or apps for workstations or mobile devices. Depending on the configuration, use one of the following methods:
  - manually download and install clients and apps
  - use a wizard to set up clients and apps

3.1 General Description of the User Interface

The user interface includes the following components:

- A menu bar at 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 view.
- The Folder view can be enabled on the left side.
- On the right side below the menu bar a tool bar is displayed. It contains app specific functions and functions for selecting the view in the display area.
- The remaining space is used for the display area.
- Depending on the action executed, the pop-up window or the notification area will overlap the display area.
- To create new items or edit existing ones, the editing window will be used.
- Text that can be clicked is displayed in blue.
- You can also use the keyboard to access the user interface functions.

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

3.1.1 The menu bar

Content

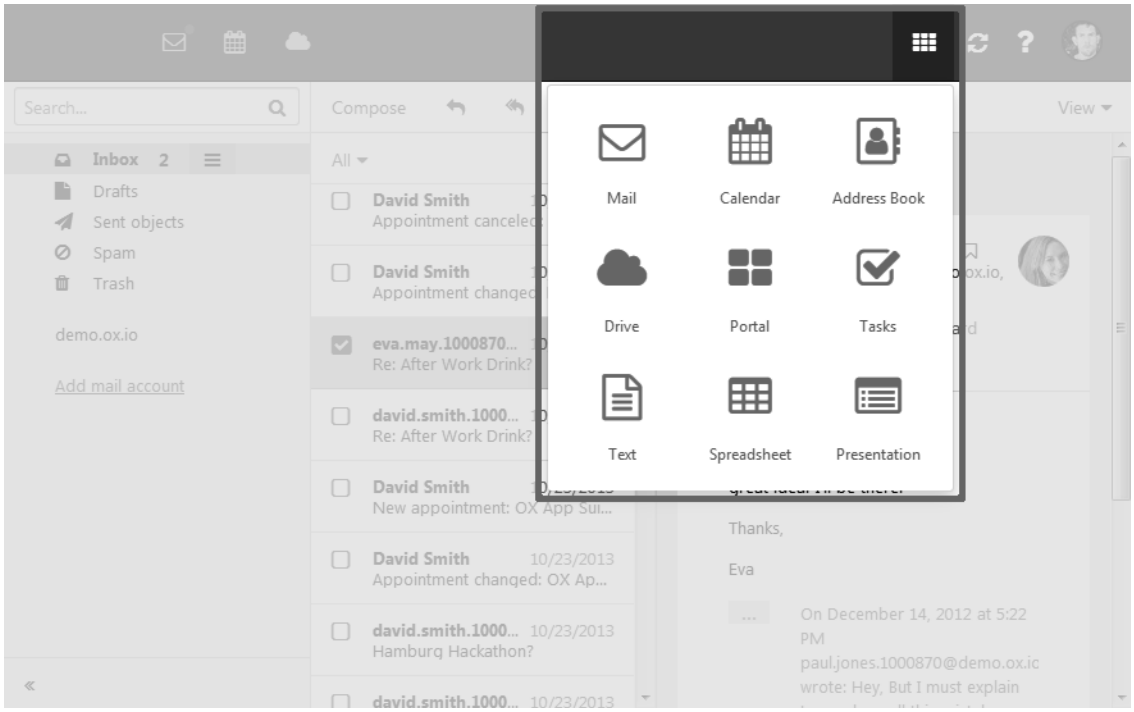
- Depending on the configuration: Quick launch icons for launching frequently used apps.
- **App Launcher** icon. Opens a menu with icons for launching an app.
- **Notifications** icon. The icon is displayed when receiving a new notification. The icon notifies you of the number of new notifications e.g., new appointment invitations. If clicking the icon, the notification area opens.
- **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 windows also include the help icon. If clicking on it, the respective help for the window context is displayed.
- **Settings** icon Your profile picture is used for the icon. If clicking on it, a menu with several functions opens:
  - **Settings**. Opens a page that allows customising settings.
  - **My contact data**. Opens a window where you can adjust your personal contact data in the global address book.
  - **Help**. Opens the online help.
  - **Sign out**. Signs you out from the groupware.

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

Also see:

App Launcher (p. 27)
General description of the search bar (p. 28)
The notification area (p. 33)

3.1.2 App Launcher

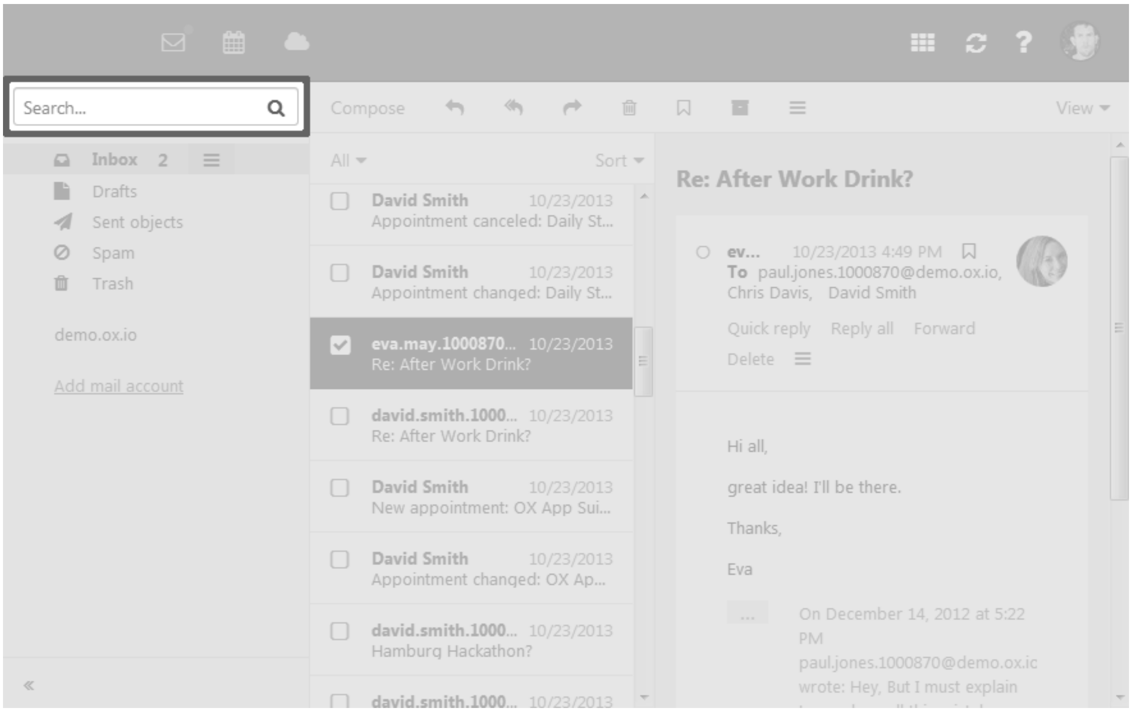


Contains squares for launching the apps. Depending on the configuration, the number of squares can vary.

Also see:

The menu bar (p. 26)

3.1.3 General description of the search bar



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

Content

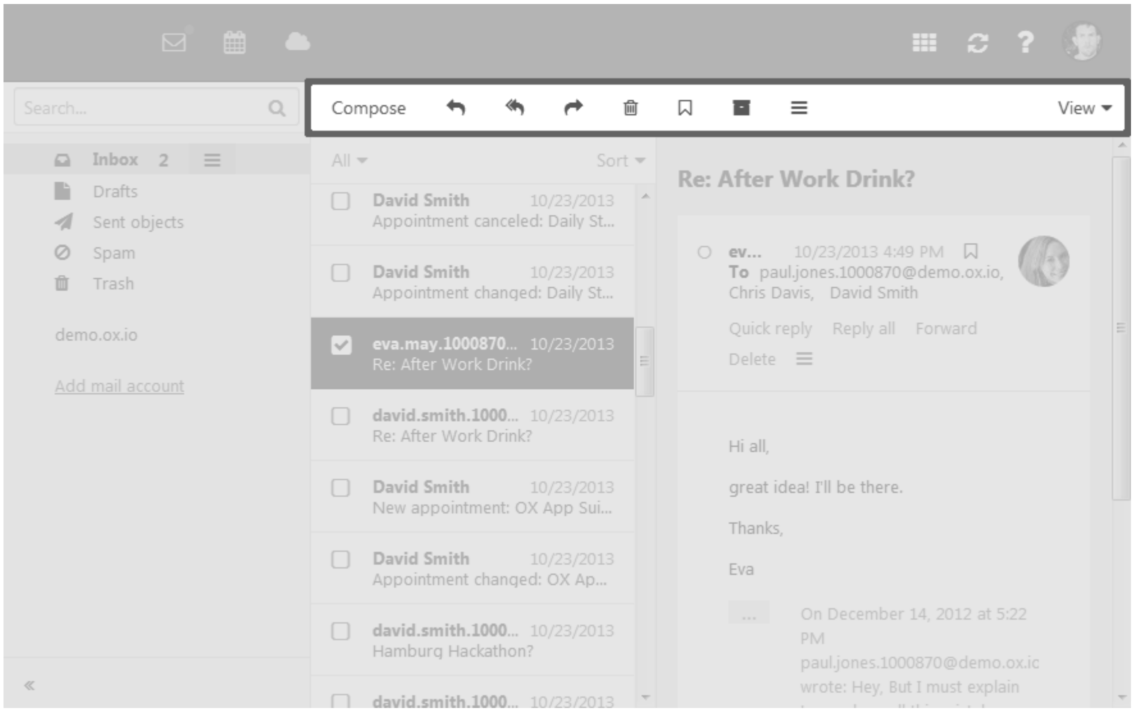
- Input field for the search term
  As soon as clicking in the input field, additional icons are displayed.
- *Options* icon . Opens a menu with app specific parameters for controlling the search. Depending on the app, additional drop-downs for controlling the search are available.
- *Close* icon. Finishes the search.
- *Online help* icon. Displays a context-sensitive help.

The search result is displayed in the display area.

Also see:

The menu bar (p. 26)
The E-Mail search bar (S. 57)
The Address Book search bar (p. 105)
The Calendar search bar (p. 129)
The Tasks search bar (p. 175)
The Drive search bar (p. 197)

3.1.4 General description of the tool bar



The tool bar is located below the menu bar.

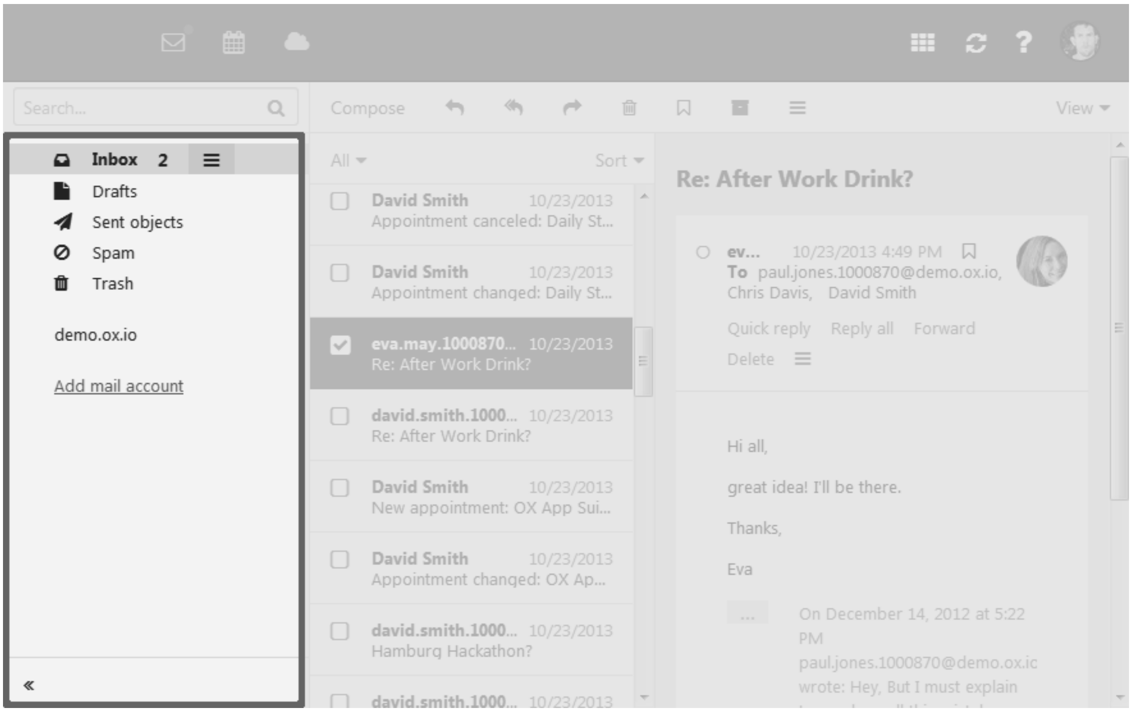
Content

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

Also see:

General description of the display area (p. 31)
General description of the folder view (p. 30)
The E-Mail tool bar (S. 58)
The Address Book tool bar (p. 106)
The Calendar tool bar (p. 130)
The Tasks tool bar (p. 175)
The Drive tool bar (p. 198)

3.1.5 General description of the folder view



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

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

Content

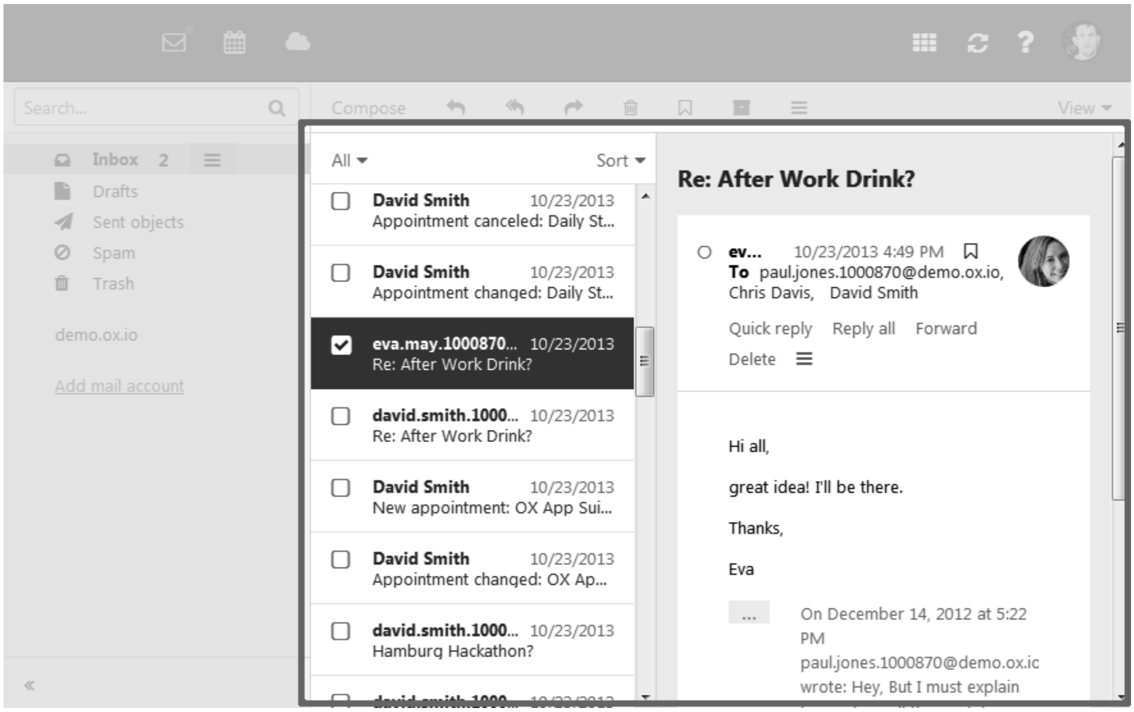
- The app specific folders
  Folders are called differently in the following apps:
  - A folder is called an address book in the *Address Book* app.
  - A folder is called a calendar in the *Calendar* app.
- Depending on the application, sections for personal, public and shared folders
  Note: Depending on the configuration, those sections might not be displayed if there are no public or shared folders.
- The **Folder-specific actions** icon next to the selected folder. It contains functions for organising folders. Depending on the folder, additional functions might be available.
  Tip: You can also access the folder-specific actions by right-clicking on a folder.
- Depending on the app, additional functions might be available.

Also see:

General description of the tool bar (p. 29)
Folders (p. 228)

The E-Mail folder view (S. 59)
The Address Book folder view (p. 107)
The Calendar folder view (p. 132)
The Tasks folder view (p. 176)
The Drive folder view (p. 199)

3.1.6 General description of the display area



Content

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

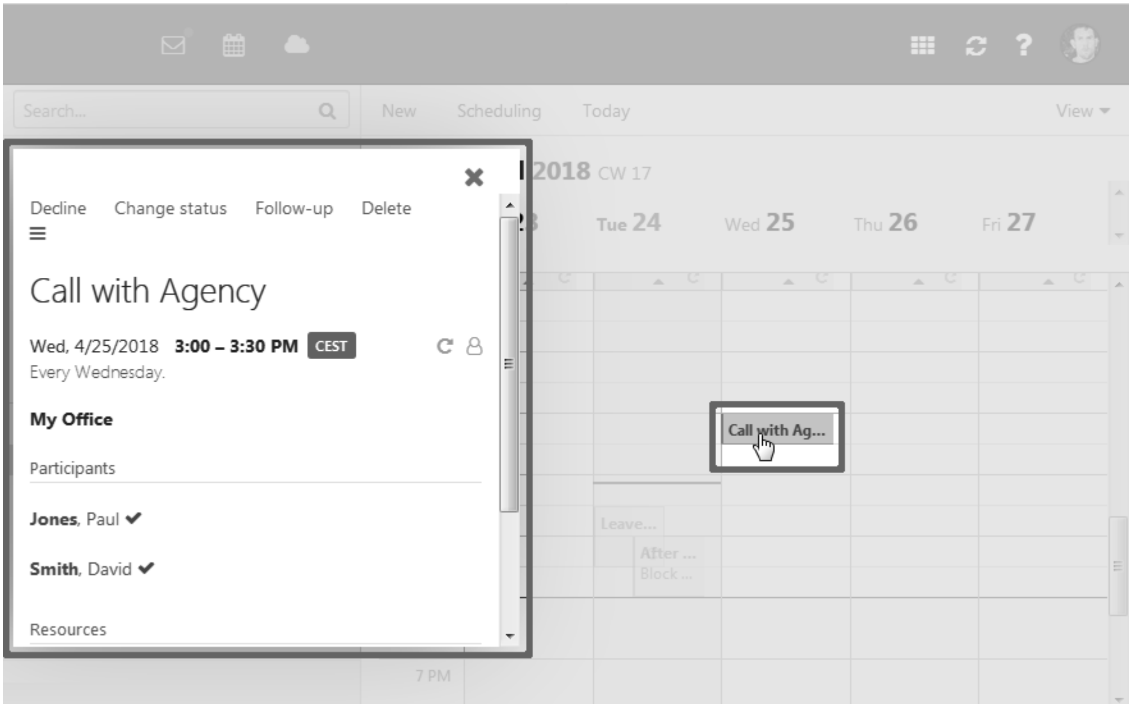
You can change the view in the display area by clicking on **View** in the tool bar.

Also see:

General description of the pop-up (p. 32)
General description of the tool bar (p. 29)

The E-Mail display area (S. 60)
The Address Book display area (p. 108)
The Calendar display area (p. 132)
The Tasks display area (p. 176)
The Drive display area (p. 201)

3.1.7 General description of the 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.

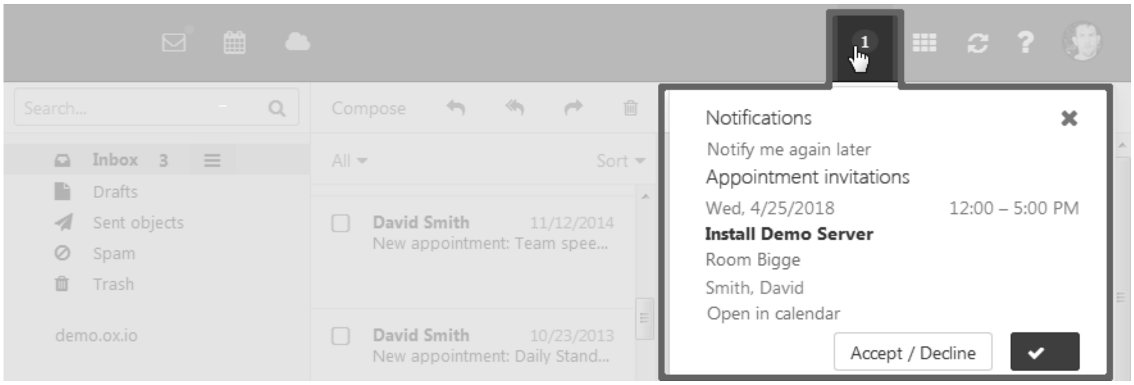
Those person related data are called *halo view*. If clicking on certain objects in the pop-up, a further pop-up opens. In order to close a pop-up, click the **Close** icon ✖ on the upper right side.

Also see:

General description of the display area (p. 31)

The E-Mail pop-up (S. 63)
The Halo View (p. 113)
The Calendar pop-up (p. 135)

3.1.8 The notification area



Displays notifications about the following events:

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

The following actions open the notification area:

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

Content

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

Also see:

The menu bar (p. 26)
Receiving Notifications (p. 42)
Customising the Basic Settings (p. 39)
Answering appointment invitations (p. 154)
Answering Task Invitations (p. 184)

3.1.9 General description of the editing window

The following actions open the editing window:

- creating a new object
- editing an object
- editing the personal contact data
- creating or editing simple text files

Content

- The title bar includes the following elements:
  - window title
  - icons for setting the window position:
    - **Minimise** icon. Displays the editing window as icon at the bottom.
    - **Maximize** icon. Displays the editing window in its maximum size. If clicking the icon again, the original size is restored. You can also double-click on the title bar again to toggle the window sizes.
    - **Cancel** icon. Cancels the current action. Closes the Format window.
- Depending on the app, app specific buttons or icons might be available.
- The button bar contains buttons for closing or canceling. Depending on the groupware's configuration, those buttons are located at the top or bottom.

Properties

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

Also see:

The E-Mail editing window (S. 64)
The contact editing window (p. 109)
The appointment editing window: (p. 138)
The task editing window (p. 179)
Changing Personal Contact Data (p. 40)
Creating or Editing Text Files (p. 210)

3.2 Keyboard Input

Learn how to use key shortcuts for interacting with the groupware.

- list of defined keys and key combinations
- use the keyboard to interact with the groupware
- examples for keyboard input

3.2.1 Keys and key combinations

The following key combinations are defined. Depending on the system, additional key combinations might be preset. Those key combinations are not officially supported.

Arrow down	Opens a menu.
Arrow left or right	Moves the cursor within input fields. Moves the cursor within the calendar views or the date picker. Opens or closes a folder in the folder view. Selects a function in the tool bar.
Arrow up or down	Selects elements in the folder view, the side bar or the display area. Moves the cursor within the calendar views or the date picker. Opens or closes a folder in the folder view. Selects a menu entry.
[a]	Moves the selected E-Mail to the *Archive* folder.
[Ctrl]+[a]	Selects all objects in the list.
[Ctrl]+[F6] on Windows and Linux systems, [F6] on MacOS systems	Switches between menu bar, folder view, side bar and display area.
[Del], [Backspace]	Deletes the selected object.
[End]	Moves the cursor to the end of the line in input fields.
[Enter]	Executes the selected function.
[Esc]	Closes a pop-up. Cancels a window.
[Home]	Moves the cursor to the beginning of the line in input fields.
[Page up], [page down]	Browses the folder view or the side bar. Browses the calendar view or the date picker, depending on the time range displayed.
[Space]	Enables or disables the selected check box.
[Tab], [Shift]+[Tab]	Selects a function, an input field or a check box.

3.2.2 Interacting with the user interface via keyboard

As an alternative to the mouse you can use the following keys:

- To switch between the menu bar, the folder view, the sidebar, and the display area, use [Ctrl]+[F6] on Windows and Linux systems, [F6] on MacOS systems.
- To select a function, an input field or a check box, use the [Tab] key. The selected element will be highlighted.
  With [Shift]+[Tab] you can select elements in reverse order.
- To execute the function selected, press [Enter].
- To enable or disable a selected checkbox, press the [Space bar].
- To toggle the checkboxes, use the cursor keys.
- To move the cursor within input fields, use the following keys: cursor keys, [Home], [End].
- To browse the folder view or the sidebar, use the following keys: [Page up], [page down]
- To open or close a folder in the folder view, use the left or right arrow key.
- To select elements in the folder view, the tool bar, the side bar or the display area, use the cursor keys.
- To close a pop-up or cancel a window, press [Esc].
- To delete the selected E-Mail messages, folders or files press [Del] or [Backspace].
- To move selected E-Mail messages to the *Archive* folder, press [a].
- To select all objects in a list, press [ctrl]+[a]

3.2.3 Use cases

Instructions that show how to use the keyboard controls:

- How to use the keyboard to send a new E-Mail
- How to use the keyboard to reply to an E-Mail

How to use the keyboard to send a new email:

1. If the *Email* app is not launched, do the following:

   Press [Ctrl]+[F6] or [F6] on Mac OS systems to highlight the menu bar.

   Use the arrow keys to navigate to the **App Launcher** icon. Press [Enter] to open the App Launcher.

   Use the arrow keys to navigate to the **E-Mail** icon Press [Enter].
   The *E-Mail* app will be launched.

2. Repeatedly press [Tab] until the **Compose** button is highlighted in the tool bar. Press [Enter]. The *Compose* window opens. The input field *To:* is enabled.
3. Enter the recipient's E-Mail address. Press [Enter].
4. Repeatedly press [Tab] until the *Subject* input field is highlighted. Enter the subject. Press [Enter]. The input field for the E-Mail text is enabled.
5. Enter the E-Mail text.
6. In order to send the E-Mail, press [Tab]. The **Send** button is highlighted. Press [Enter]. The E-Mail is sent.
7. To add attachments, repeatedly press [Tab] or [Shift]+[Tab] until the **Attachment** button is highlighted. Press [Enter]. Select **Add local file**.

   A dialogue field for selecting files opens. Depending on the system, use the [Tab] key, the [Enter] key and the cursor keys to select a file and to close the system dialogue.

   Repeatedly press [Tab] until the **Send** button is highlighted. Press [Enter]. The E-Mail is sent.

How to use the keyboard to reply to an email:

1. If the *Email* app is not launched, do the following:

   Press [Ctrl]+[F6] or [F6] on Mac OS systems to highlight the menu bar.

   Use the arrow keys to navigate to the **App Launcher** icon. Press [Enter] to open the App Launcher.

   Use the arrow keys to navigate to the **E-Mail** icon Press [Enter].
   The *E-Mail* app will be launched.

2. Repeatedly press [Tab] or [Ctrl]+[F6] or [F6] on Mac OS systems to highlight a folder in the folder view. Use the cursor keys to select the desired folder. To view or hide a sub-folder, use the left or right arrow key.
3. If the wanted folder is highlighted, press [Enter]. The first E-Mail in the folder is highlighted in the list.
4. Use the cursor keys to select the desired email.
5. To reply to the E-Mail, repeatedly press [Tab] or [Shift]+[Tab] , until the **Reply** function or the **Reply all** function is highlighted. Press [Enter] to activate the function.

   Repeatedly press [Shift]+[Tab] until the **Compose** button is highlighted in the tool bar. Use the cursor keys to browse to the **Reply to sender** icon or to the **Reply to all recipients** icon. Press [Enter].

3.3 Customising the Basic Settings

How to customise the basic settings:

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

The following settings are available. Depending on the 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.
- **Design**
  Defines the colour scheme for the user interface.
- **Refresh interval**
  Defines the interval for retrieving new objects from the server.
- **Default app after sign in**
  Defines the application that is displayed after login.
- **Automatic sign out**
  Specifies whether you are automatically signed out if you have not worked with the groupware for a specific time.
- **Automatic opening of notification area**
  Specifies whether the notification area automatically opens when receiving a new notification or E-Mail.
- **Show desktop notifications**
  Defines whether you will receive a desktop notification for new E-Mail messages. Depending on the browser settings, the **Manage browser permissions now** button is displayed. If clicking on the button, a browser specific dialogue for allowing notifications opens.
- **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.

Also see:

The notification area (p. 33)

Changing Personal Contact Data (p. 40)
Changing the Password (p. 41)
Receiving Notifications (p. 42)
Manually Installing Local Apps (p. 44)
Using a Wizard to Set Up Local Apps (p. 45)

3.4 Changing Personal Contact Data

The following options are available:

- change personal contact data
- create a contact picture by uploading an existing picture or by taking a new photo with the device camera

How to change your personal contact data:

1. Click the **Settings** icon on the right side of the menu bar. Click on **My contact data** in the menu.
   You can also click on **My contact data** in the basic settings or in the address book settings.
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.

How to create a contact picture:

1. Click the **Settings** icon on the right side of the menu bar. Click on **My contact data** in the menu.
   You can also click on **My contact data** in the basic settings or in the address book settings.
2. Click on the empty contact picture. The *Edit image* window opens.
   - You can upload an existing image or take a new picture with the device camera.
   - You can adjust the image section with the zoom and by moving or rotating the photo.

   Click on **OK**.
3. Click on **Save**. The photo will be inserted.
   In order to edit the photo, click on it.

Also see:

User data widget (p. 49)
Customising the Basic Settings (p. 39)
Changing the Password (p. 41)
Receiving Notifications (p. 42)
Manually Installing Local Apps (p. 44)
Using a Wizard to Set Up Local Apps (p. 45)
General description of the editing window (p. 34)

3.5 Changing the Password

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

How to change your password:

1. Click the **App Launcher** icon in the menu bar. Click on **Portal** in the App Launcher.
2. If the *User data* widget is not displayed, click on **Add widget** on the upper right side. Click on **User data**.

   Click on **My password** in the *User data* widget.
3. Change your password.

Also see:

Customising the Basic Settings (p. 39)
Changing Personal Contact Data (p. 40)
Receiving Notifications (p. 42)
Manually Installing Local Apps (p. 44)
Using a Wizard to Set Up Local Apps (p. 45)

3.6 Receiving Notifications

You can configure the groupware to receive notifications about the following events:

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

Depending on the notification, different actions are triggered:

- When receiving a new E-Mail, you will get a desktop notification.
- For all other events, you will be notified in the notification area.

How to enable desktop notifications about the receipt of new E-Mail messages:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Basic settings** in the side bar.
3. Enable **Show desktop notifications** in the notification area.

   Depending on the browser settings, the **Manage browser permissions now** button is displayed. Click the button. You are asked by the browser whether the receipt of notifications should be allowed. Grant this permission.

   Note: Depending on the browser, you might have to allow the receipt of notifications in the browser settings for the setting above to take effect. Information can be found in the browser help pages.

How to use the notification area when being notified about new events:

1. As soon as a notification is being received, the **Notifications** icon shows the number of new notifications. To open the notification area, click the icon.

   If the notification area is to be opened automatically upon receipt of new notifications, proceed as follows:

   a. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.

   b. Click on **Basic settings** in the side bar.

      Enable **Automatic opening of notification area** in the display area.

2. You can do the following:
   - To close the notification area, click the **Close** icon. The notifications will be hidden.
     In order to show the notifications again, click the **Notifications** icon in the menu bar.
   - To receive the notification again later, click on **Notify me again later**. The notification area will be closed.
   - To show a notification's details, click on the notification title.
   - To display appointment invitation suggestions in the calendar, click on **Open in calendar**.
   - To accept or decline an invitation, click on the respective button.
   - To receive a specific reminder again, select a value in **Remind me again**. Click on **OK**. The notification area will be closed.
   - To mark overdue tasks as done, click on the respective button.
   - To delete a reminder, click on **OK** next to the reminder.
     You can also click the **Delete** icon next to the reminder.
   - If there is more than one reminder: To delete all reminders, click on **Remove all reminders** at the bottom.

Also see:

Customising the Basic Settings (p. 39)
Changing Personal Contact Data (p. 40)
Changing the Password (p. 41)
Manually Installing Local Apps (p. 44)
Using a Wizard to Set Up Local Apps (p. 45)
Settings for receiving E-Mail messages. (S. 100)
The notification area (p. 33)

3.7 Manually Installing Local Apps

You can manually install local Drive apps for MS Windows, macOS, iOS or Android. The local Drive clients synchronise your *Drive* app data with your local workstation or mobile device.

Note: Depending on the configuration, those functions might not be available. In this case you can use a wizard to set up the apps.

How to install local Drive apps for workstations or mobile devices:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Downloads**.
   Click the respective icon in the display area. Follow the instructions on installing the apps.

Also see:

Customising the Basic Settings (p. 39)
Changing Personal Contact Data (p. 40)
Changing the Password (p. 41)
Receiving Notifications (p. 42)
Using a Wizard to Set Up Local Apps (p. 45)

3.8 Using a Wizard to Set Up Local Apps

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

- Installing and configuring apps and clients on devices such as PCs, tablets and smartphones. The supported devices are: Windows, Apple and Android.
- Installing an E-Mail client on Windows systems. The client makes your E-Mail messages, appointments, tasks and contacts available locally.
- 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 synchronise your *Drive* app data with your local workstation or mobile device.
- Depending on the device, the configuration might also be possible by E-Mail or SMS. Advanced users can display the configuration data for a manual configuration.

Note: Depending on the 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 **Settings** 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.

Also see:

Customising the Basic Settings (p. 39)
Changing Personal Contact Data (p. 40)
Changing the Password (p. 41)
Receiving Notifications (p. 42)
Manually Installing Local Apps (p. 44)

4 Portal

Learn how to work with the *Portal* application.

- the *Portal* components
- customise the contents

How to launch the *Portal* app:

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

4.1 The *Portal* Components

The portal includes the following components.

- *Signed in as*
- **Customise this page** button
- **Add widget** button
- *Appointments* widget
- *Inbox* widget
- *Tasks* widget
- *Recently changed files* widget
- *User data* widget
- *Quota* widget
- *News* widgets
- Widgets with *news from your social networks*
- Widgets with information about Drive apps

Depending on the configuration, the portal components can differ from the display described. If a widget is not displayed, you can add the widget.

4.1.1 *Signed in as*

Displays the username that you used for signing in.

4.1.2 Customise this page button

Clicking on this button displays a page that allows customising the Portal.

Also see:

Customising the Portal (p. 51)

4.1.3 Add widget button

Clicking on this button opens a menu that allows adding new widgets.

Also see:

Adding Portal widgets (p. 52)

4.1.4 *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 the **Close** icon on the upper right side.

4.1.5 *Inbox* widget

Shows new E-Mail messages. You can do the following:

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

4.1.6 *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 the **Close** icon on the upper right side.

4.1.7 *Recently changed files* widget

Displays new or changed files.

4.1.8 *User data* widget

Includes links for the following functions:

- Changing your personal contact data
- Changing your password

4.1.9 *Quota* widget

Displays the current quota used on your account on the server.

4.1.10 *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 feed can be changed later.

4.1.11 Widgets with *news from your social networks*

Show current information from own social networks.

- The most recent messages from a social network are displayed in a widget.
- If clicking on content, a pop-up opens with details and links to the contact's profile.
- Depending on the network, certain functions are displayed, e.g. for posting or creating a message.

To display news from your social networks, add a new widget to the Portal. You can change your settings at a later point of time.

4.1.12 Widgets with information about Drive apps

Depending on the configuration, there are widgets being displayed that contain information on the installation of local Drive apps. Additional information can be found in the Drive apps user guide.

4.2 Customising the Portal

The following options are available:

- Changing the widgets' order
- Removing Portal widgets
- Adding Portal widgets
- Adding a Portal widget for social networks
- Changing the Portal widgets' settings

Note: Depending on the configuration, some widgets might not be able to be changed.

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.

Also see:

Removing Portal widgets (p. 51)
Adding Portal widgets (p. 52)
Adding a Portal widget for social networks (p. 52)
Changing the Portal widgets' settings (p. 53)

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

Also see:

Changing the widgets' order (p. 51)
Adding Portal widgets (p. 52)
Adding a Portal widget for social networks (p. 52)
Changing the Portal widgets' settings (p. 53)

4.2.3 Adding Portal widgets

You can extend the existing widgets by adding new ones.

How to add new widgets:

1. Use one of the following methods:
   - Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item. Click on **Portal** in the side bar. Click on **Add widget**. Select an entry.
   - 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**.

Tips:

- In the *Drive* app you can add a file as a portal widget.
- In the *E-Mail* app you can add a Portal widget.

Also see:

Changing the widgets' order (p. 51)
Removing Portal widgets (p. 51)
Adding a Portal widget for social networks (p. 52)
Changing the Portal widgets' settings (p. 53)

4.2.4 Adding a Portal widget for social networks

The following options are available:

- In order to access information and functions of your social networks, you can add widgets for social networks.
- If you do not have an Xing account yet, you can use a widget to create a new Xing account.

How to add a widget for accessing social networks:

1. In the *Portal* app, click on **Add widget** on the upper right side. Select one of the entries. The widget will be added.
2. To enable the access, add your social network account by clicking on the respective button in the widget.

   You can change or delete the account in the account settings.

How to create an XING account by using your groupware data:

1. In the *Portal* app, click on **Add widget** on the upper right side. Select **XING**. The widget will be added.
2. Click on **Create a Xing account using the data stored here** in the widget.
3. Check the suggested data for creating the XING account. In order to create the account, click on **Confirm**.

Also see:

Changing the widgets' order (p. 51)
Removing Portal widgets (p. 51)
Adding Portal widgets (p. 52)
Changing the Portal widgets' settings (p. 53)
Editing accounts (p. 250)

4.2.5 Changing the Portal widgets' settings

How to use the Portal widgets settings:

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

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

The following settings are available:

- **Edit button**
  Allows editing a widget's settings, e.g. the URL or description.
  Note: This button is only available for certain widgets.
- **Colour button**
  Defines the colour used for displaying a widget's name.
- **Disable button**
  Removes a widget from the Portal. To display the widget again, click on the **Enable** button.
- **Delete icon**
  Warning: If you delete a widget, all settings for this widget will be lost.
  This icon deletes a widget from the portal and from the list of widgets on the settings page.
- **Reduce to widget summary checkbox**
  Defines whether the complete content of a widget is displayed on mobile devices or just an overview. This is e.g. valid for the widgets *Recently changed files*, *Appointments*, *Inbox*. In order to view the complete content of the widget, tap the overview text.
  Note: You have to re-login in order for the new setting to get activated.

Also see:

Changing the widgets' order (p. 51)
Removing Portal widgets (p. 51)
Adding Portal widgets (p. 52)
Adding a Portal widget for social networks (p. 52)

5 E-Mail

Learn how to work with the *E-Mail* application.

- the *E-Mail* components
- display E-Mail messages
- view or save E-Mail attachments
- send email messages
- create E-Mail folders
- organize E-Mail messages
- use E-Mail filters
- search for E-Mail messages
- share E-Mail messages with other *users*
- access your external e-mail accounts that you have set up with other providers
- use the *E-Mail* settings

How to launch the *E-Mail* app:

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

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

5.1 The *E-Mail* Components

The *E-Mail* app includes the following components.

- The E-Mail search bar
- The E-Mail tool bar
- The E-Mail folder view
- The E-Mail categories bar
- The E-Mail display area
    - The E-Mail list
    - The E-Mail detail view
    - The E-Mail pop-up
- The E-Mail editing window

5.1.1 The E-Mail search bar

Enables you to search for E-Mail messages

The search bar is displayed if the folder view is visible. In order to display the folder view, click on **View** in the tool bar. Enable **Folder view**.

Also see:

General description of the search bar (p. 28)
Searching for E-Mail Messages (S. 94)
Displaying email messages (S. 65)

5.1.2 The E-Mail tool bar

Contains functions for sending, editing and organizing E-Mail messages.

Content

- **Compose**. Creates a new E-Mail.
- Icons for **replying to** and **forwarding** the selected E-Mail:
- **Delete** icon. Deletes the E-Mail messages selected by you.
- **Set category** icon. Opens a menu allowing you to move an E-Mail to a category. This icon is only available if the categories bar is displayed.
- Icons for flagging E-Mail messages.
    - **Set colour** icon. Opens a menu allowing you to assign a coloured label to the E-Mail.
    - **Flag** icon. Flags the E-Mail.

  Note: Depending on the configuration, not all options for flagging might be available.
- **Archive** icon. Archives the E-Mail messages selected by you.
- **More actions** icon. Opens a menu with additional functions.
- **View**. Opens a menu with check boxes for controlling the view.
    - Defining the layout of the list and detail view: **Vertically**, **Compact**, **Horizontally**
    - **List**. Shows the list of E-Mail messages. To display the detail view click on an E-Mail. Above the detail view a navigation bar is displayed.
    - **Use categories**. Opens or closes the categories bar.
    - **Configure**. Opens the window for configuring the categories bar.
    - **Folder view**. Opens or closes the folder view.
    - **Checkboxes**. Displays checkboxes in the list, for marking objects.
    - **Text preview**. Shows a preview of the E-Mail content for each E-Mail in the list.
    - **Contact pictures**. Next to each E-Mail in the list, a contact picture of the sender is displayed, provided the sender saved one in the address book.
    - **Date and time**. Shows the exact date and time when the E-Mail was received.
    - **Message size**. Shows the E-Mail size.
    - **Vacation notice**. Opens the *Vacation notice* window.
    - **All attachments**. Shows all attachment that you have sent or received, in the *Drive* app.

Also see:

General description of the tool bar (p. 29)
Sending email messages (S. 67)
Organising E-Mail messages (S. 77)

5.1.3 The E-Mail folder view

Displays the E-Mail folders.

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

Content

- *Inbox*. By default, all incoming E-Mail messages are received in this folder.
- *Unread messages*. This folder shows all unread messages.
- *Drafts*. Contains the E-Mail messages saved as drafts.
- *Sent objects*. Contains the E-Mail messages sent by you.
- *Trash*. Contains the E-Mail messages deleted by you.
- *Archive*. Contains the E-Mail messages archived by you.
- *My folders*. Contains the E-Mail folders created by you.

Depending on the configuration, the content can differ from this information.

Functions

- To display the number of E-Mail messages in a folder, hover over the folder name. A tool tip shows the number of E-Mail messages.
- If clicking on a folder, its E-Mail messages are displayed.
- The **Actions** icon ☰ next to the selected folder offers functions for organising data and app specific folder functions.
- In the *Drive* app, the **View all Attachments** button below the folders shows all E-Mail attachments that you have received or sent .
- Below the folders there's the button **Add e-mail account** for adding E-Mail accounts.

Also see:

General description of the folder view (p. 30)
Folders (p. 228)
Adding E-Mail Folders (S. 76)

5.1.4 The E-Mail categories bar

Shows predefined categories for the E-Mail messages in the *Inbox* folder. This allows assigning incoming E-Mail messages to certain categories sorted by senders.

Notes:

- Depending on the configuration, categories might not be available. If categories are available, you can show or hide the categories bar in the **View** menu in the tool bar.
- The categories' number, names and order are preset. Depending on the server configuration, some categories can be renamed or disabled.

Functions

- If clicking on a category, only the E-Mail messages assigned to this category are shown in the display area.
- If double-clicking or right-clicking on a category, a window opens that allows renaming or disabling categories.

Also see:

The E-Mail list (S. 61)
Working with tabs (S. 78)
Displaying email messages (S. 65)

5.1.5 The E-Mail display area

Contains the E-Mail list and an E-Mail's detail view.

In order to select a layout, click on **View** in the tool bar.

Also see:

General description of the display area (p. 31)

5.1.6 The E-Mail list

Displays a list of the E-Mail messages in the current folder.

Content

- If a vacation notice is active, a notification is displayed above the list.
  If you close the notification, the vacation notice remains active.
- The following details are displayed for each E-Mail: sender, subject, date or time of the receipt or the E-Mail's size. Unread E-Mail messages are marked with the *Unread* icon ● .
  If **Text preview** is enabled in the **View** tool bar menu, a preview of the E-Mail content will be displayed below the subject.
- If available, additional information is shown: attachment icons, coloured label, flag, number of E-Mail messages in conversation, priority.
- Encrypted E-Mail messages are marked with the *Encrypted* icon
  . Information on encrypting E-Mails can be found in *Encrypting Data with Guard* (p. 259)

Functions

- To select multiple E-Mail messages, enable the **Checkboxes** option in the **View** drop-down in the tool bar.
  You can also use your system's multi-selection functions.
- If clicking on the **All** button above the list, a drop-down opens. It allows executing the following functions for all E-Mail messages in the current E-Mail folder: mark as read, move, archive, delete.
- If clicking on the **Sort by** button above the list, a menu opens that helps you sort your E-Mail messages. To combine all E-Mail messages of a conversation in a single list entry, enable the **Conversations** checkbox in **Sort**.
  The sorting setting will be applied to the selected E-Mail folder. You can use different settings for the individual folders.
- To display a sender's E-Mail address instead of the sender name, hover over the sender name. The original E-Mail address is displayed in a tooltip.
- If clicking on an E-Mail, its content is displayed in the display area.
  If double-clicking on the E-Mail in the list, the content is displayed in a window.
- To enable frequently used functions, you can use the context menu for an E-Mail or for multiple E-Mail messages.
- To adjust the list width, hover over the line between the list and the detail view. Drag the border to the left or to the right.

Also see:

Displaying email messages (S. 65)
Replying to email messages (S. 73)
Forwarding E-Mail messages (S. 73)
Organising E-Mail messages (S. 77)
Sending a vacation notice automatically (S. 75)

5.1.7 The E-Mail detail view

Displays the content of the E-Mail that you selected in the list. If double-clicking on the E-Mail in the list, the data are displayed in a window.

In order to display the detail view, click on **View** in the tool bar. Enable one of the following settings: **Vertically**, **Compact**, **Horizontally**

Content

- Subject
  If E-Mail messages are sorted by conversations, the **Open/close all messages** icon is displayed next to the conversation subject. If clicking on a free area between the sender and the date of receipt, the E-Mail opens or closes.
- **Read** icon. Changes the status from Read to Unread and vice versa.
- The sender's name or E-Mail address. If clicking on it, a *pop-up* opens. It displays information about the contact.
  Depending on the configuration, you can let the E-Mail authenticity be indicated with a colour and an icon. If clicking the icon, a respective notification is displayed.
- The recipient's name. The names of additional E-Mail recipients, if existing. If clicking on a name, a *pop-up* opens. It displays information about the contact.
- Date and time of the receipt.
- Icons for flagging E-Mail messages:
  - **Flag** icon. Flags the E-Mail.
  - **Set colour** icon. Opens a menu allowing you to assign a coloured label to the E-Mail.

  Note: Depending on the configuration, not all options for flagging might be available.
- A picture of the sender, if available.
- Frequently used functions: **Reply**, **Reply all**, **Forward**, **Delete**
- **More actions** icon. Opens a menu with editing functions.
- If the E-Mail contains attachments, additional elements are displayed:
  - **Attachment** icon. If clicking on it, the attachments are displayed as icons or list.
  - Buttons that allow applying a function to all E-Mail attachments at once.
  - **Squares**, **List** icons. Shows the attachments as squares or as list. To apply a function to a specific attachment, click on the attachment's name in the List view.
- If selecting an E-Mail with an attachment as link in the *Sent items* folder, information about the attachment is displayed at the top of the E-Mail.
- E-Mail text
  Quotes from previous E-Mail messages are marked at the beginning of the line. If the quote is only partly displayed, you can use the **Show quoted text** icon ... to display the complete quote.

Also see:

Viewing or Saving email Attachments (S. 66)
Replying to email messages (S. 73)
Forwarding E-Mail messages (S. 73)
Inviting all Email recipients to an appointment (S. 97)
Saving all email recipients as a distribution list (S. 97)
Organising E-Mail messages (S. 77)

Show e-mail authenticity (p. 255)

The E-Mail pop-up (S. 63)

5.1.8 The E-Mail pop-up

Displays the contact data of the sender or recipient that you select in the detail view.

Content

- Buttons for frequently used functions
  - If this contact is not yet in an address book, **Add to address book** is displayed. If clicking on the button, the window for creating a new contact opens.
  - **Send mail**. Opens the window for sending a new E-Mail to the person.
  - **Invite to appointment**. Opens the window for creating an appointment with this person.
  - If the contact is saved in a personal address book, **Edit** is displayed. If clicking on the button, the window for editing the contact opens.
  - **Delete** icon. Removes the contact from the address book shown in *Saved as*.
- **More actions** icon. If clicking on the button, a menu with frequently used functions for organising contacts is opened.
- The person's contact data.
- If the contact data of this person are saved, the path to the address book with the contact data is displayed.
- Information about this person from social networks. You can use the available buttons to open this person's profile.
- If you share appointments with this person, they are displayed below *Shared appointments*.
- If you exchanged E-Mail messages with this person, they are displayed below *Recent conversations*.

Also see:

General description of the pop-up (p. 32)

Creating a new contact (p. 114)
Sending a new email (S. 68)
Creating new appointments (p. 147)

The E-Mail detail view (S. 62)

5.1.9 The E-Mail editing window

This window is used when creating or editing an E-Mail.

In order to open the window, do one of the following:

- Click on **Compose** in the tool bar.
- Select an E-Mail. Click an icon for replying or forwarding, in the tool bar.
- Select an E-Mail draft in the folder. Click on **Edit** or **Edit copy** in the tool bar.

Content

- The title bar includes the following elements:
  - window title
  - icons for adjusting the window position, cancel icons
- Addresses
  - **From**. Shows your sender address. If clicking on it, a menu with several functions opens:
    - select another sender address
    - **Show names**. Defines whether the real name is displayed.
    - **Edit names**. Opens the window for editing the real name.
  - **To** input field. While entering the recipients, matching suggestions are displayed. To accept a suggestion, click on it.
    Select contacts icon . Opens a window for selecting contacts from an address book.
  - To send a copy to other recipients, click on **CC** or **BCC** on the right side of the input field.
  - If clicking on **To**, **CC** or **BCC**, a window opens that allows selecting contacts from a list.
- E-Mail content
  - **Subject** input field. Enter your E-Mail's subject in this field.
  - **Attachments**. Adds local files or files that are saved in the *Drive* app.
  - **Signatures**. Let's you define whether to add a signature to the E-Mail text.
  - **Options**. Shows the following options: Defining an E-Mail's text format, setting the priority, attaching a vCard, requesting a read receipt.
  - Depending on the configuration, there are functions for sending E-Mail messages in an encrypted format.
    - **Encrypt** icon
    - **Security** button.
  - Input field for the E-Mail text. If having selected the HTML format from the **Options**, you can format the text or add images.
- button bar
  - **Send**. Sends the E-Mail. Closes the Format window.
  - **Save**. Saves the current E-Mail content in the *Drafts* folder.
  - **Cancel**. Cancels composing the E-Mail.

Also see:

General description of the editing window (p. 34)
Sending a new email (S. 68)
Working with email drafts (S. 82)

5.2 Displaying email messages

By default, the content of the inbox is displayed. Other E-Mail folders can be opened by using the folder view. In the E-Mail settings, you can define whether a notification sound is to be played for incoming E-Mail messages.

How to display an email:

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

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

2. Click an E-Mail in the list. The content of the E-Mail will be displayed in the detail view.
   - If the E-Mail is part of a conversation, all E-Mail messages in the conversation are displayed one below the other. To open or close an E-Mail that is part of a conversation, click on a free area between the sender and the date of receipt.
     To open or close all E-Mail messages in the conversation, click the **Open/close all messages** icon on the upper right side of the detail view.
   - If the E-Mail includes a quote from a previous E-Mail, you can display the quote by clicking the **Show quoted text** icon ... .

Additional functions:

- To sort the E-Mail list, click on **Sort by** above the list.
  Note: To reduce latency when loading the E-Mail list, only a certain percentage of the E-Mail messages in a folder will be loaded by the server if their number exceeds a defined limit. If browsing to the bottom of the list, the next part will be loaded.
- In order to select a layout, click on **View** in the tool bar.
- When having selected the **List** view, the display area contains a list of all E-Mail messages in the folder. If clicking on an E-Mail, the E-Mail's detail view is displayed.
  To open the list view again or to browse the E-Mail messages, use the icons above the detail view.
- You can open the E-Mail in a window by double-clicking on the E-Mail in the list.

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

Also see:

Navigating within the folder structure (p. 231)
Working with tabs (S. 78)

Searching for E-Mail Messages (S. 94)
Viewing or Saving email Attachments (S. 66)
Showing the email source (S. 82)

Externally linked images in E-Mail messages (p. 254)
Show e-mail authenticity (p. 255)
Using a whitelist (p. 256)

The E-Mail detail view (S. 62)
The E-Mail list (S. 61)
The E-Mail pop-up (S. 63)

5.3 Viewing or Saving email Attachments

The file names of E-Mail attachments are displayed in the detail view. The following functions are available:

- View or download attachments or save attachments in *Drive*.
- Depending on the configuration, you can view all attachments from sent or received E-Mail messages in the *Drive* app.

How to use the email attachment functions:

1. Select an E-Mail with one or multiple attachments.

   To show a preview, click the **Expand** icon ▸ in the detail view. A preview of the attachments is displayed as square or list.

   To toggle the view, click the **Squares** icon or the **List** icon on the right side.
2. To apply a function to all attachments, click on one of the buttons *Viewer*, **Present**, **Download**, **Save in Drive** next to the *Attachment* icon ✎ .
3. In order to apply a function to a specific attachment, click on the attachment in the list view.

   To display an attachment in the *Viewer*, select the attachment in the squares view.

How to view all your E-Mails' attachments in the *Drive* app:

Note: Depending on the configuration, this function might not be available.

1. Use one of the following methods:
   - Click on **View** in the tool bar. Click on **All attachments**.
   - Click on **View all attachments** in the folder view.

   The *Drive* app opens. The *My attachments* folder shows all attachments of all E-Mail messages that have been sent or received by you.
2. You can use the *Drive* functions.

Also see:

Displaying email messages (S. 65)
The E-Mail detail view (S. 62)
The E-Mail list (S. 61)
The E-Mail pop-up (S. 63)
Organising Files and *Drive* Folders (p. 211)

5.4 Sending email messages

The following options are available:

- Sending a new email
- Selecting contacts from an address book
- Selecting sender address
- Adding attachments
- Sending attachments as a link
- Using signatures
- Replying to email messages
- Forwarding E-Mail messages
- Automatically forwarding email messages
- Sending a vacation notice automatically

5.4.1 Sending a new email

How to send a new email:

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

   Tip: If you enter a space, followed by the @ character, followed by a name, matching suggestions from the address books are displayed. To accept a suggestion and enter it in the **To** field, click on it.
5. Click on **Send**.

Additional functions:

- With drag and drop you can move the recipients between the fields *To*, *CC* and *BCC*.
  In the E-Mail settings, you can determine that each outgoing E-Mail will also be sent as blind copy to a specific E-Mail address.
- To format the E-Mail text or to enter images, use HTML format. To do so, click on **Options**. Select **HTML**. A formatting bar appears.
  - To format the E-Mail text, use the formatting bar.
    You can define default values for the font style, size and color in the E-Mail settings.
  - To enter images at the current cursor position, drag one or several images from a file browser or from the desktop to the E-Mail text input field.
    To remove an image, use the context menu.
- The **Options** drop-down offers additional options:
  - set the priority
  - attach your vCard
  - request a read receipt
- Depending on the configuration, there are functions for sending E-Mail messages in an encrypted format.
  - **Enable encryption** icon
  - **Security** button.

Additional instructions:

- Selecting contacts from an address book (S. 69)
- Selecting sender address (S. 69)
- Adding attachments (S. 70)
- Sending attachments as a link (S. 71)
- Using signatures (S. 71)

Also see:

The E-Mail editing window (S. 64)
Replying to email messages (S. 73)
Forwarding E-Mail messages (S. 73)
Automatically forwarding email messages (S. 74)
Sending a vacation notice automatically (S. 75)

Sending encrypted E-Mail messages (p. 262)

5.4.2 Selecting contacts from an address book

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

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

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

1. You have the following options for finding a specific contact:
   - Enter a name in **Search**.
   - To view the contacts of a specific address book, click on **All folders**. Select an address book from the list. Depending on the configuration, you can select a department from the list.
2. Select one or several contacts. The selected contacts are displayed below the list. To undo the selection, click on **Clear selection**.

   You can also use your system's multi-selection functions.
3. To confirm your selection of selected contacts, click on **Select**.

Also see:

Sending a new email (S. 68)
Creating Distribution Lists (p. 116)
Adding participants or resources to an appointment (p. 150)
Using the scheduling view (p. 151)
Adding participants to a task (p. 183)
Sharing with public links (p. 236)
Inviting to a shared item (p. 238)

5.4.3 Selecting sender address

If sending an E-Mail, you can set the sender address to be shown to the recipient, in the E-Mail editing window.

How to select your sender address:

1. Click on the sender address next to *From:* in the E-Mail editing window. A menu opens.
2. If you have set up external E-Mail accounts, you can use those addresses as sender addresses. Select an E-Mail address from the list.

   Note: Depending on the folder selected, a defined sender address will be preset.
3. You can define the name to be displayed with your E-Mail addresses. To do so, proceed as follows:
   a. Click on **Edit name**. The *Edit real names* window opens. The names that are preset in the account settings are displayed.
   b. Enable the checkbox of the name that you want to edit. Edit the name. Click on **Save**.

   In order to display the sender addresses without names, disable **Show names**.

Also see:

Sending a new email (S. 68)
Adding E-Mail Accounts (S. 98)

5.4.4 Adding attachments

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

1. Select the files to be sent as attachments.
   - To send a local file as attachment, click on **Attachments**. Click on **Add local file**. Select one or several files.
     You can also add an attachment by dragging one or several files from a file browser or from the desktop to the E-Mail window and dropping them below the **Attachments** button.
   - In order to use the current version of a file from the *Drive* app as an attachment, click on **Attachments**. Click on **Add from Drive**.
     Open a folder in the *Add attachments* window. Select one or several files. Click on **Add**.
2. You can use the following functions:
   - In order to remove an attachment, click the **Delete attachment** icon .
   - To hide or show the attachments, click the **Expand** icon on the left side.

Additional functions:

- Depending on the configuration, the **Image size** button is displayed if attached images exceed a specified number of pixels or a specified file size.
  Clicking on this button opens a menu that allows selecting an image size.
- Depending on the configuration, attachments will not be sent when having reached a certain size limit. In this case, the attachment will be saved in the *E-Mail attachments* folder in the *Drive* app. The E-Mail includes a link to the attachment.

Also see:

Sending a new email (S. 68)
Sending attachments as a link (S. 71)

5.4.5 Sending attachments as a link

This function allows sending large attachments by E-Mail. This is how it works:

- The attachments are uploaded to a new folder below **Drive Mail** in the *Drive* app. The name of this folder corresponds to the E-Mail subject. The folder is shared with a public link.
- The E-Mail recipients receive a link for downloading the attachments.

How to send attachments as a link in the E-Mail editing window:

1. Select the files to be sent as attachments.
   - To send a local file as link, click on **Attachments**. Click on **Add local file**. Select one or several files.
     You can also add an attachment by dragging one or several files from a file browser or from the desktop to the E-Mail window and dropping them below the **Attachments** button.
   - In order to use the current version of a file from the *Drive* app as an attachment, click on **Attachments**. Click on **Add from Drive**.
     Open a folder in the *Add attachments* window. Select one or several files. Click on **Add**.
2. You can use the following functions:
   - In order to remove an attachment, click the **Delete attachment** icon.
   - To hide or show the attachments, click the **Expand** icon
3. Click on **Use Drive Mail** . The **Options** button will be displayed.
   Click on **Options**. The *Drive Mail options* window opens.
   - To set the expiration date for the public link, click on an entry below **Expiration**.
     If you select an expiration date, you can let the attachment be deleted after the expiration date. To do so, enable **delete if expired**.
     Note: Depending on the configuration, those functions are optional or mandatory.
   - To protect the public link with the attachments with a password, enable **Use password**. Enter a password. To view the password while entering it, click the icon on the right side in the input field.
   - To receive notifications about certain actions, enable one or several entries below **E-mail notifications**.
     Note: Depending on the configuration, this function might not be available.

Notes:

- Depending on the configuration, there might be a maximum file size for attachments that can be sent as a link.
- In the *Sent objects* folder, the E-Mail is marked with the icon . When viewing the E-Mail, the following information is displayed at the top of the E-Mail text:
  - A link to the folder containing the attachment.
  - Information about the expiration date and a possibly used password.
  - A list of the attachments' file names.

Also see:

Sending a new email (S. 68)
Adding attachments (S. 70)

5.4.6 Using signatures

An E-Mail signature is text that is automatically entered in the E-Mail when being composed. It is typically used for inserting the name, company, and contact address at the bottom of the E-Mail text. You can create signatures in the plain text or HTML format. The following functions are available:

- create new signature, edit existing signatures, set default signatures

- add a signature to the E-Mail text

How to create or edit a signature:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select the entry **E-Mail** in the side bar. Click on **Signatures**.
   The existing signatures are shown in the display area.
3. To add a new signature, proceed as follows:
   a. In the display area, click on **Add new signature**. The *Add signature* window opens.
   b. Enter a name for the signature. Enter the text for the signature.
      Define whether the signature is to be entered below or above the E-Mail text.
      Click on **Save**.
4. To edit an existing signature, the following options are available:
   - In order to edit a signature's text, click on **Edit** next to the signature.
   - In order to delete a signature, click the **Delete** icon next to the signature.

   In **Default signature for new messages** and in **Default signature for replies or forwards**, you can define the signatures to be used as default.

How to add a signature to the E-Mail text in the E-Mail editing window:

1. Click on **Signatures**.
2. Select a signature from the list.

Also see:

Sending a new email (S. 68)

5.4.7 Replying to email messages

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

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

How to reply to an email:

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

   You can also use one of the following methods:
   - Click on the **Reply all** button in the detail view.
   - Use the context menu in the E-Mail list.
3. Fill in the details for sending the E-Mail.

Also see:

Sending a new email (S. 68)
Forwarding E-Mail messages (S. 73)

5.4.8 Forwarding E-Mail messages

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

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

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

How to forward an email:

1. Select one or several E-Mail messages.
2. Click the **Forward** icon in the tool bar.

   You can also use one of the following methods:
   - Click on the **Forward** button in the detail view.
   - Use the context menu in the E-Mail list.
3. Select one or more recipients. Information can be found in Sending a new email (Seite 68).
4. Fill in the details for sending the E-Mail.

Also see:

Sending a new email (S. 68)
Automatically forwarding email messages (S. 74)

5.4.9 Automatically forwarding email messages

You can let email messages be automatically forwarded to another address.

How to automatically forward email messages:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select the entry **E-Mail** in the side bar.
   Click on **Auto forward ...** in the display area. The *Auto forward* window opens.
3. To activate the auto forwarding, click the icon on the upper left side.
   Enter the email address to which you want to forward the messages.
   In order to keep a copy of the E-Mail, enable **Keep a copy of the message**.
   The auto forwarding is entered as an E-Mail filter. If additional filter rules are to be applied after the auto forwarding, enable **Process subsequent rules**. You can also edit the auto forwarding in the E-Mail filter settings.
4. Click on **Apply changes**.

Also see:

Using E-Mail Filters (S. 89)
Settings for receiving E-Mail messages. (S. 100)
Sending a new email (S. 68)
Replying to email messages (S. 73)
Forwarding E-Mail messages (S. 73)
Sending a vacation notice automatically (S. 75)

5.4.10 Sending a vacation notice automatically

A vacation notice informs the sender of an E-Mail that you will not retrieve your E-Mails for a specific period of time. You can set the following:

- the subject and text of the vacation notice
- the time frame when the vacation notice is active
- the E-Mail addresses for which the vacation notice is active

How to create and activate a vacation notice:

1. Click on **View** in the tool bar. Click on **Vacation notice** at the bottom.
   You can also use the **Vacation notice** button in the E-Mail settings.
   The *Vacation notice* window opens.
2. Enable the checkbox on the upper left side.
3. To define the time range for sending the vacation notice, enable **Send vacation notice during this time only**. Set the start and end date.
   Note: Depending on the configuration, this setting might not be available.
4. Enter a subject and a text for the vacation notice.
5. In order to display all options, click on **Show advanced options**.
   - You can specify an interval for sending a vacation notice if there are several E-Mail messages from the same sender.
   - You can specify the sender address to be used for sending the vacation notice.
   - The vacation notice will be sent if messages are reaching your primary E-Mail address. You can also activate a vacation notice if messages are reaching your other E-Mail addresses.
6. Click on **Apply changes**.

If a vacation notice is active, the following is displayed:

- On the E-Mail settings page, the **Vacation notice** button is marked with an additional icon.
- In the *E-Mail* app, a notification is displayed above the E-Mail list. If clicking on the notification, the **Vacation notice** window opens.

Tip: The vacation notice is entered as an E-Mail filter. You can also edit the vacation notice in the E-Mail filter settings.

Also see:

Using E-Mail Filters (S. 89)
Settings for receiving E-Mail messages. (S. 100)
Sending a new email (S. 68)
Replying to email messages (S. 73)
Forwarding E-Mail messages (S. 73)
Automatically forwarding email messages (S. 74)

5.5 Adding E-Mail Folders

You can create additional E-Mail folders below your primary E-Mail account.

How to create a new E-Mail folder:

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

Also see:

Folders (p. 228)
Organising E-Mail messages (S. 77)

5.6 Organising E-Mail messages

Some of the techniques for organizing contacts require that contact folders have already been set up by you. Information on creating folders can be found in Adding E-Mail Folders (Seite 76).

The following options are available:

- Working with tabs
- Moving or copying E-Mail messages
- Marking email messages as read or unread
- Collecting addresses
- Categorising E-Mail messages
- Showing the email source
- Working with email drafts
- Creating E-Mail reminders
- Adding an email to the portal
- Saving email messages
- Importing email messages
- Printing email messages
- Archiving E-Mail messages
- Deleting E-Mail messages
- Cleaning up E-Mail folders
- Using Unified Mail

5.6.1 Working with tabs

Tabs allow you to save incoming E-Mail messages in the *Inbox* folder separated by senders. The following options are available:

- enable or disable tabs
- assign incoming E-Mail messages to a tab
- edit the tabs view

How to enable or disable the usage of tabs:

1. Click on **View** in the tool bar.
2. Enable or disable the **Use categories** check box below *Inbox*.

How to assign incoming E-Mail messages in the inbox to categories:

1. Select the **Inbox** folder in the folder view.

   Select a category from the categories bar. E-Mail messages that have not been assigned to a category yet, are displayed in the **General** category.
2. Drag an E-Mail from the list to a category in the categories bar and drop it there.

   You can also select an E-Mail. Click the **Move** icon in the tool bar. Select a category from the menu.

   A pop-up window notifies you that the E-Mail has been moved to the category.
3. In order to finish the process, do one of the following:
   - In order to only move the selected E-Mail to the category, close the pop-up window.
   - In order to move all existing and future incoming E-Mail messages from this sender to the category, click on *Move all messages*.

How to edit the tab view:

1. Click on **View** in the tool bar. Click on **Configure** below *Inbox*.

   You can also double-click or right-click on a category in the categories bar.

   The *Configure categories* window opens.
2. To enable or disable a tab, enable or disable the respective checkbox.

   To rename a tab, edit the respective text.

   Note: Some tabs cannot be edited.

   In order to hide the categories bar, click on **Disable categories**.
3. Click on **Save**.

Also see:

Displaying email messages (S. 65)
Navigating within the folder structure (p. 231)

5.6.2 Moving or copying E-Mail messages

You can move or copy E-Mail messages to another E-Mail folder. The following options are available:

- move or copy individual E-Mail messages or a complete E-Mail conversation to another folder
- move all E-Mail messages in an E-Mail folder

Prerequisite: You need to have the appropriate permissions to create objects in the target folder.

How to move or copy an E-Mail:

1. Select one or several E-Mail messages.
2. Click the **More actions** icon ≡ in the tool bar. Click on **Move** or **Copy** in the menu.
   You can also use one of the following methods:
   - Use the **More actions** icon ≡ in the detail view.
   - Use the context menu in the E-Mail list.

   A window opens.
3. Select a folder. You can create a new folder by clicking on **Create folder**.
   Click on **Move** or **Copy**.

Tips:

- To move E-Mail messages from a specific sender to a folder, you can create a new rule when moving E-Mail messages.
- You can also move the selected objects by dragging the objects from the folder view to a folder.
- In order to move all E-Mail messages from a folder, click on **All** above the list. Select **Move all messages**.

Also see:

Adding E-Mail Folders (S. 76)

5.6.3 Marking email messages as read or unread

Unread E-Mail messages are marked with the *Unread* icon ● . The following options are available:

- mark single E-Mail messages as read or unread
- mark all E-Mail messages in an E-Mail folder as read

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

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

   You can also use one of the following methods:

   - Use the **More actions** icon ☰ in the detail view.
   - Click the **Read** icon ○. The icon changes to the **Unread** icon ●.
   - Use the context menu in the E-Mail list.
3. In order to mark this E-Mail as read, analogously do the same.

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

Also see:

Displaying email messages (S. 65)

5.6.4 Collecting addresses

You can collect E-Mail addresses by adding the addresses to an address book. The following options are available:

- Automatically collect new E-Mail addresses when sending or reading E-Mail messages by activating this function in the E-Mail settings.
- Manually adding email addresses to an address book

How to manually add an email address to an address book:

1. Select an E-Mail.
2. Click on the sender's or a recipient's name in the detail view.
3. Click on **Add to address book** in the pop-up.

Note: This function is only available if the contact has not been added yet.

Also see:

Displaying email messages (S. 65)

5.6.5 Categorising E-Mail messages

Depending on the configuration, you have several options for categorizing E-Mail messages. The following options are available:

- a coloured label
- a flag

How to categorise an E-Mail:

1. Select one or several E-Mail messages.
2. To add a coloured label, click the **Set colour** icon in the tool bar. Select a colour from the menu.
   You can also use the **Set colour** icon in the detail view.
   In order to remove the label, again click the icon in the tool bar or in the detail view. Click the **None** menu item.
3. To add a flag, click the **Flag** icon ☆ in the tool bar.
   You can also use one of the following methods:
   - Click the **Flag** icon ☆ in the detail view.
   - Open the context menu in the E-Mail list. Click on **Flag**.

   To remove the flag, use one of the following methods:
   - Again click the icon in the tool bar or in the detail view.
   - Open the context menu in the E-Mail list. Click on **Unflag**.

Tip: To sort E-Mail messages by flags, click on **Sort by** above the list.

Also see:

Displaying email messages (S. 65)

5.6.6 Showing the email source

The email source contains the complete content of an email i.e.: the complete email header data.

How to display the email source:

1. Select an E-Mail.
2. Click the **More actions** icon ≡ in the tool bar. Select **View source** from the menu. The source is displayed in the *View source* window.

   You can also use one of the following methods:
   - Use the **More actions** icon ≡ in the detail view.
   - Use the context menu in the E-Mail list.

Tip: The context menu allows you to select the source and copy it to the clipboard.

Also see:

Displaying email messages (S. 65)
Creating new rules (S. 90)

5.6.7 Working with email drafts

The following options are available:
- Saving an E-Mail as a draft while you are composing the E-Mail.
- Sending a saved E-Mail draft. The draft will be deleted after it has been sent.
- Sending a copy of an E-Mail draft. The draft will be kept.

How to save an email as a draft:

Click on *Save* in the E-Mail editing window.

Result: The E-Mail is saved in the *Drafts* folder.

Tip: In the E-Mail settings, you have the option to let an E-Mail that you are composing be saved in regular intervals.

How to send a saved email draft:

1. Open the *Drafts* folder. Select an E-Mail.
2. Click on **Edit draft** in the tool bar.
3. Complete the entries. Click on **Send**.

How to send a copy of an E-Mail draft:

1. Open the *Drafts* folder. Select an E-Mail.
2. Click on **Edit copy** in the tool bar.
3. Complete the entries. Click on **Send**.

Also see:

Sending email messages (S. 67)

5.6.8 Creating E-Mail reminders

You can activate a reminder for an E-Mail. This function creates a task and reminds you of the due date.

How to create an E-Mail reminder:

1. Select an E-Mail.
2. Click the **More actions** icon ☰ in the tool bar. Select **Reminder** from the menu.

   You can also use the **More actions** icon ☰ in the detail view.

   Note: When having selected an E-Mail conversation, this function is only available in the detail view, not in the tool bar.
3. Complete the details in the *Remind me* window. Select a time from the **Remind me** drop-down field. Click on **Create reminder**.

Result: A task will be created. A button is shown below the task text. If clicking on this button, the original E-Mail will be displayed.

Also see:

Creating Tasks (p. 182)

5.6.9 Adding an email to the portal

You can add an E-Mail as widget to the Portal.

How to add an email to the portal:

1. Select an E-Mail.
2. Click the **More actions** icon ☰ in the tool bar. Click on **Add to portal** in the menu.

   You can also use the **More actions** icon ☰ in the detail view.

   Note: When having selected an E-Mail conversation, this function is only available in the detail view, not in the tool bar.

Also see:

Customising the Portal (p. 51)

5.6.10 Saving email messages

You can save an E-Mail as a text file. The text file has the file extension EML. If you select multiple E-Mail messages, an EML file will be created for each E-Mail. The EML files will be saved as a zip archive then.

How to save an email:

1. Select one or several E-Mail messages.
2. Click the **More actions** icon ☰ in the tool bar. Select **Save as file** from the menu.

   You can also use the **More actions** icon ☰ in the detail view.
3. Fill in the details for saving the file.

Also see:

Importing email messages (S. 83)

5.6.11 Importing email messages

You can import an email that is available in the EML format.

How to import an email:

1. Open the E-Mail folder to which you want to import the E-Mail.
2. Drag the EML file from a file browser or from the desktop to the *E-Mail* app window. Drop the EML file in the list in the display area.

Also see:

Saving email messages (S. 83)

5.6.12 Printing email messages

How to print an E-Mail's content:

1. Select one or several E-Mail messages.
2. Click the **More actions** icon ≡ in the tool bar. Click on **Print** in the menu.

   You can also use one of the following methods:

   - Use the **More actions** icon ≡ in the detail view.
   - Use the context menu in the E-Mail list.

   A window with a print preview opens.
3. If required, change the printer settings. Click on the **Print** button.
4. Close the print preview window.

Also see:

Archiving E-Mail messages (S. 85)

5.6.13 Archiving E-Mail messages

When archiving E-Mail messages, those E-Mail messages are moved to the *Archive* folder. The *Archive* folder contains a separate sub-folder for each calendar year. The archived E-Mails are saved to those sub-folders sorted by the year of receipt. The *Archive* folder is created as soon as you initially use this function. The following options are available:

- archive a folder's E-Mail messages that are older than 90 days
- archive single E-Mail messages

How to archive an E-Mail folder's content:

1. Select an E-Mail folder in the folder view.
2. The following options are available:
   - Click on **All** above the list. Select **Archive all messages**.
   - Click the **Actions** icon next to the folder name. Click on **Archive all messages**.
3. In the *Archive messages* window click on **Archive**.

Result: All E-Mail messages that are older than 90 days are moved to the archive folder.

How to archive individual E-Mail messages:

1. Select one or several E-Mail messages.
2. Click the **Archive** icon in the tool bar.
   You can also use one of the following methods:
   - Press the [a] key on the keyboard.
   - Use the context menu in the E-Mail list.

Result: The E-Mail messages are moved to the Archive folder.

Also see:

Printing email messages (S. 84)

5.6.14 Deleting E-Mail messages

The following options are available:

- Delete individual E-Mail messages or entire E-Mail conversations. By default, the E-Mail messages are moved to the Trash folder.
- Delete all E-Mail messages in an E-Mail folder. By default, the E-Mail messages are moved to the Trash folder.
- Recover deleted E-Mail messages from the Trash.
- Permanently delete E-Mail messages from the trash. You can also permanently delete all E-Mail messages from the trash by emptying the trash.

Warning: If you enable the E-Mail settings option **Permanently remove deleted e-mail messages** you will not be able to recover deleted E-Mail messages. It is recommended that you not use this setting.

How to delete an E-Mail:

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

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

How to delete all email messages in a folder:

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

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

How to recover deleted email messages:

1. Select the *Trash* folder in the folder view.
2. Select one or several E-Mail messages.
3. Click the **More actions** icon in the tool bar. Select **Move** from the menu.
4. Select a folder in the *Move* window. Click on the **Move** button.

How to permanently delete an E-Mail:

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

1. Open the *Trash* folder in the folder view.
2. Select one or several E-Mail messages.
3. Click the **Delete** icon in the tool bar.

Result: The E-Mail is permanently deleted.

How to permanently delete the content of the Trash folder:

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

1. Select the *Trash* folder in the folder view.
2. Click the **Actions** icon next to the folder name. Click on **Empty folder**.
3. Confirm that you want to empty the folder.

Result: The objects in the trash are permanently deleted.

Also see:

Archiving E-Mail messages (S. 85)
Cleaning up E-Mail folders (S. 87)

5.6.15 Cleaning up E-Mail folders

Depending on the E-Mail client's settings, E-Mail messages that you deleted from within an E-Mail client like Apple Mail, MS Outlook or Mozilla Thunderbird, might be deleted only after having signed out from the client. In the meantime, those E-Mail messages will be shown as crossed out in the groupware. To delete those E-Mail messages clean up the E-Mail folder.

Note: Depending on the configuration, this function is not available as such E-Mail messages are not displayed.

How to clean up an E-Mail folder:

1. In the folder view, select the folder that you want to clean up.
2. Click the **Actions** icon next to the folder name. Click on **Clean up**.

Also see:

Deleting E-Mail messages (S. 85)

5.6.16 Using Unified Mail

With Unified Mail you can display E-Mail messages from multiple E-Mail accounts in one central folder. This gives you a quick overview of the multiple E-Mail accounts' inboxes. Unified Mail can be described as follows:

- In addition to an E-Mail account's Inbox the *Unified Mail* folder displays an additional E-Mail view for an account. The E-Mail messages actually exist only once.
- E-Mail messages in the Inbox's subfolders are not displayed in the *Unified Mail* folder.
- The E-Mail messages in the *Unified Mail* folder are marked with a label in the side bar. It contains the E-Mail account's name. The internal E-Mail account is marked with the label *Primary account*.

The following functions are available:

- To use Unified Mail, enable the function for one or several E-Mail accounts.
- You can display E-Mail messages in the *Unified Mail* folder.

How to activate Unified Mail for an email account:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Accounts**.
3. Click on **Edit** next to an external E-Mail account in the display area. The settings are displayed in a pop-up.
4. Enable **Use Unified Mail for this account**.
   Click on **Save** at the bottom of the pop-up.

How to display email messages in the*Unified Mail* folder:

1. Open the *Unified Mail* folder in the folder view.
2. Alternatively, click on a subfolder in the *Unified Mail* folder.

Tip: The account is indicated with a label next to an E-Mail's subject in the side bar.

Also see:

Displaying email messages (S. 65)
Editing accounts (p. 250)

5.7 Using E-Mail Filters

E-Mail filters help you organise incoming E-Mail messages. An E-Mail filter consists of one or several rules. By setting rules you can e.g. trigger the following actions:

- The E-Mail is moved to a specific E-Mail folder.
- The E-Mail is forwarded to another E-Mail address.
- The E-Mail is marked as read.

In order to use E-Mail filters, proceed as follows:

- Create E-Mail folders.
- Create one or several rules.
- Specify an order for the rules.
- Set if subsequent rules are to be processed when a rule matches.

The following options are available:

- Creating new rules
- Adding a condition
- Adding an action
- Creating a new rule when moving
- Changing a rule

Note: For the following instructions and examples, it is assumed that the complete range of E-Mail filter functions is available. Depending on the configuration, some functions might not be available.

5.7.1 Creating new rules

A rule contains:

- a name,
- one or several conditions,
- one or several actions. You can specify whether one or all conditions are to be met in order to process the actions.

How to create a new rule:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select the entry **E-Mail** in the side bar. Click on **Filter rules**.
3. In the display area, click on **Add new rule**. The *Create new rule* window opens.
   - Enter a rule name.
   - Click on **Add condition**. Make a selection from the drop-down menu. Complete the condition details.
   - Click on **Add action**. Select an action from the menu. Complete the action details.
4. You can set whether subsequent rules are to be processed if the rule is met. To do so, enable or disable **Process subsequent rules**.
5. Click on **Save**.

Additional instructions:

- Adding a condition (S. 91)
- Adding an action (S. 92)

Also see:

Creating a new rule when moving (S. 92)
Changing a rule (S. 92)
Showing the email source (S. 82)

5.7.2 Adding a condition

A condition helps to define the E-Mail messages to which the action should be applied. You can set one or multiple conditions.

How to add a condition in the *Create new rule* window:

1. Click on **Add condition**. Make a selection from the drop-down menu. Note the following:
   - In order to use an E-Mail part that is not contained in the list, select **Header**. Enter a header entry in the *Name* input field. You can read an E-Mail's header by displaying the source data.
   - In order to consider the *BCC* part, select **Envelope - To**. Envelope includes the E-Mail recipients entered in the *To*, *CC* or *BCC* field.
   - In order to use a part of the E-Mail content in the condition, select **Content**.
   - In order to use the date of receipt in the condition, select **Current Date**.
2. Select a criterion from the drop-down next to the E-Mail part. Enter an argument in the input field.
3. You can add additional conditions. You can then specify whether one or all conditions are to be met in order to process the actions. To do so, click on **Apply rule if all conditions are met**.

   As soon as there is a condition, you can create nested conditions. To do so, click on **Add condition**. Select **Nested condition**.

   To delete a condition, click the **Delete** icon next to the condition.

Example: The following details are used for the condition:

- E-Mail part "Subject"
- Criterion "Is exactly"
- Argument "minutes"

In this case it would verify whether the subject of an E-Mail exactly matches the argument "minutes".
Additional examples how to filter E-Mail messages using the subject:

- Criterion: "contains"
  The condition is met if the subject contains the characters in the argument.
  Example: The argument is "minutes".
  - The condition is met for the subject "minutes".
  - The condition is also met for the subject "meeting minutes".
- Criterion: "Matches"
  The condition is met if the subject exactly matches the characters in the argument. The character string can contain wildcards.
  Example: The argument is "minutes*". The "*" character is a wildcard for any characters.
  - The condition is met for the subject "minutes".
  - The condition is not met for the subject "meeting minutes".
- Criterion: "Regex"
  The condition is met if the subject contains the characters provided by the regular expression in the argument. Regular expressions allow complex requests. More information can be found on respective sites on the Web. The following, very simple regular expression should give an insight to the topic.
  Example: The argument is "organi(z|s)ation". The expression "(z|s)" stands for either the "z" or the "s" character.
  - The condition is met for the subject "minutes".
  - The condition is also met for the subject "organisation".
  - The condition is not met for the subject "Organic".

Also see:

Creating new rules (S. 90)
Adding an action (S. 92)

5.7.3 Adding an action

Use an action to define what happens with an E-Mail that matches the conditions. You can set one or multiple actions.

How to add an action in the *Create new rule* window:

1. Click on **Add action**. Select an action from the menu.
2. Depending on the action, additional buttons and inputs fields are displayed. Use such functions to complete the action.
3. You can add additional actions.
   To delete an action, click the **Delete** icon next to the action.

Also see:

Creating new rules (S. 90)
Adding a condition (S. 91)

5.7.4 Creating a new rule when moving

You can create a new rule when moving an E-Mail to another folder. Incoming E-Mail messages for which this rule applies will be moved to this folder automatically.

How to create a new rule when moving an E-Mail

1. Select an E-Mail.
2. Click the **More actions** icon in the tool bar. Select **Move** from the menu.
   You can also use the **More actions** icon in the detail view.
   Select a folder in the *Move* window. Click on the **Move** button.
3. Enable **Create filter rule**. A note with details about the filter is displayed.
   Click on the **Move** button. The *Create new rule* window opens.
4. Enter a rule name. You can adjust the conditions or actions. Click on **Save**.
   The E-Mail will be moved. The new rule will be created.

Also see:

Creating new rules (S. 90)
Changing a rule (S. 92)

5.7.5 Changing a rule

The following options are available:

- edit a rule's settings: name, condition, actions
- disable, enable, delete a rule
- change the activation order of the rules

How to change existing rules:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select the entry **E-Mail** in the side bar. Click on **Filter rules**.
3. To edit a rule's settings, click on **Edit** next to the rule. Change the settings in the *Edit rule* window.
4. To disable a rule, click on **Disable** next to the rule.
   To enable a rule, click on **Enable** next to the rule.
5. To change the order, hover the mouse pointer over the **Move** icon next to a rule. Drag the rule up or down and drop it appropriately.
   Note: This function is only available if there are at least two rules.
6. To delete a rule, click the **Delete** icon next to the rule.

Also see:

Creating new rules (S. 90)
Creating a new rule when moving (S. 92)

5.8 Searching for E-Mail Messages

In order to search for specific E-Mail messages, you can use the following search criteria:

- search terms for subject, E-Mail text, sender, recipients, attachment name
- Search terms for a time range. Searches for E-Mail messages that you received within the time range. You define a valid time range with the following details.
  - The key words *today*, *yesterday*, *last week*, *last month*, *last year*
  - The key words for those time intervals: *last 7 days*, *last 30 days*, *last 365 days*
  - A day of the week, e.g. *Monday*
  - A specific month, e.g. *July*
  - A four digit date, e.g. *2015*
  - A date, e.g. *1/31/2015*
  - A date range, e.g. *12/1/2014 - 1/31/2015*
- folders that are to be searched

How to search for E-Mail messages:

1. Click on the **Search** input field. Additional icons are displayed.
2. Enter a search term in the input field. The search menu opens.

Define the data sources to be searched by clicking on an entry in the search menu.

- If clicking on the search term or pressing enter, the following data sources are searched: sender, recipient, subject, E-Mail text
- In order to only search in the subject, click on **in subject**.
- In order to only search in the E-Mail text, click on **in mail text**.
- To search within the attachments' file names, click on **in attachment file names**.
- In order to search for senders or recipients matching the search term, click on a name. You can define whether to search the sender, recipients or both. To do so, click the **Options** icon next to the name.
- In order to search for E-Mail messages within a specific time range, use a valid time range as a search term. As soon as a valid time range is recognized in your input, the time range is displayed in the search menu. Click on the time frame.

The search results are displayed in the list that is shown in the display area. For each search result, the folder with the found object is displayed.

3. To select a folder for the search, click the **Options** icon in the input field. The current folder will be displayed in a drop-down. To select another folder, open the drop-down.
   - If you select **All folders**, all folders and subfolders of the internal E-Mail account are searched. Note: Depending on the E-Mail server, this function might not be available. In this case, only the current folder will be searched, not sub-folders.
   - If you select a specific folder or the folder of an external E-Mail account, only this folder is searched, but no subfolders.
4. To refine the search result, enter further search terms: To remove a search term, click the **Remove** icon next to the search term.
5. In order to finish the search, click the **Close** icon in the input field.

5.9 E-Mail messages within a team

The following options are available:

- Sharing Email Messages
- Subscribing to Email folders
- Inviting all Email recipients to an appointment
- Saving all email recipients as a distribution list

5.9.1 Sharing Email Messages

You can share your E-Mail messages with internal users. Depending on the requirements, different methods exist.

- To make email messages available to internal users, proceed as follows:
  - Create a new personal folder to which you will copy or move the required email messages.
  - Share this folder.
  - The users have to subscribe to your shared E-Mail folder in order to have access to the E-Mail messages.
- If another user shared an E-Mail folder with you, you have to subscribe to the shared E-Mail folder in order to have access to the E-Mail messages.

Also see:

Subscribing to Email folders (S. 96)
Inviting all Email recipients to an appointment (S. 97)
Saving all email recipients as a distribution list (S. 97)

5.9.2 Subscribing to Email folders

In order to see email folders shared by other users, you have to subscribe to those folders.

How to subscribe to shared email folders:

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

Also see:

Settings for receiving E-Mail messages. (S. 100)
Sharing Email Messages (S. 96)
Inviting all Email recipients to an appointment (S. 97)
Saving all email recipients as a distribution list (S. 97)

5.9.3 Inviting all Email recipients to an appointment

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

How to invite all email recipients to an appointment:

1. Select an E-Mail.
2. Click the **More actions** icon ☰ in the detail view.
   Select **Invite to appointment** from the menu.
3. Complete the data for creating an appointment.

Also see:

Sharing Email Messages (S. 96)
Subscribing to Email folders (S. 96)
Saving all email recipients as a distribution list (S. 97)

5.9.4 Saving all email recipients as a distribution list

If an email contains multiple recipients, you can save all the recipients as a new distribution list.

How to save the recipients of an email as a distribution list:

1. Select an E-Mail.
2. Click the **More actions** icon ☰ in the detail view.
   Select **Save as distribution list** from the menu.
3. Complete the details for creating the distribution list.

Also see:

Sharing Email Messages (S. 96)
Subscribing to Email folders (S. 96)
Inviting all Email recipients to an appointment (S. 97)

5.10 Adding E-Mail Accounts

By default, you use your primary E-Mail account in the groupware. If you use additional E-Mail accounts like Google Mail, you can access those accounts' E-Mail messages from within the groupware, by adding those accounts as E-Mail accounts.

How to add an E-Mail account:

1. Click on **Add E-Mail Account** in the folder view. The *Add E-Mail Account* window opens.
2. Click an icon. The next procedure depends on the E-Mail account provider.
   - For some providers, a new browser window opens. Log in with your credentials to grant access to the E-Mail account.
   - If the provider asks you for the permission to access the data, grant this permission.
   - For some providers, enter your credentials in the *Add E-Mail Account* window. Then, click on **Add**.

   You can also manually enter the required data by clicking on **Manually**.
3. If the E-Mail messages in this account are also to be shown in the *Unified Mail* folder, enable **Use Unified Mail for this account**.

   Note: Depending on the configuration, this function might not be available.

An entry for the E-Mail account appears in the folder view. The entry contains this account's E-Mail folders. Open one of those folders to do the following:

- read this account's E-Mail messages
- send E-Mail messages from this account

Also see:

Editing the primary E-Mail account (p. 249)
Editing accounts (p. 250)
Removing accounts (p. 250)
Using Unified Mail (S. 88)

5.11 Email Settings

The following options are available:

- Settings for receiving E-Mail messages. (S. 100)
- Settings for composing E-Mail messages (S. 102)

5.11.1 Settings for receiving E-Mail messages.

How to use the settings for receiving E-Mail messages:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Email** in the side bar.

The following settings are available by default:

Buttons

- **Vacation notice**
  See Sending a vacation notice automatically (S. 75)
- **Auto-forward**
  See Automatically forwarding email messages (S. 74)
- **Change IMAP subscriptions**
  See Subscribing to Email folders (S. 96)

View

- **Allow HTML formatted Email messages?**
  Specifies whether or not displaying HTML messages is allowed. In terms of bandwidth, HTML messages have a high impact and can be a high security risk as they can contain dangerous scripts.
- **Colour quoted lines**
  Specifies whether original messages are highlighted and introduced with a vertical line. The messages or replies will be displayed as embedded. This option assumes that the original email text is not attached but appended to the email.
- **Use fixed-width font for text email messages**
  Specifies whether a fixed-width font is used when displaying a plain text E-Mail.
- **Show requests for read receipts**
  Defines whether a return receipt is displayed if a received E-Mail includes a receipt confirmation request.
- **Show folder with all unseen messages**
  Defines whether the *Unread messages* folder is displayed in the folder view. If you enable this setting, unread messages from different folders are additionally displayed in this folder.

Notification sounds

- **Play sound on incoming mail**
  Defines whether a sound is played for incoming E-Mail messages.
  Note: Desktop notifications have to be allowed in the browser settings. Information can be found in Receiving Notifications (p. 42).
- **Sound**
  You can select between different sounds.

Behaviour

- **Permanently remove deleted e-mail messages**
  Defines whether E-Mail messages will be removed permanently immediately after you click the Delete button or whether they will go to the trash folder.
  Warning: Permanently removed E-Mail messages cannot be restored.
- **Automatically collect contacts in the "Collected addresses" folder while sending E-Mail messages**
  Defines whether new E-Mail addresses are automatically collected in the **Collected contacts** folder when sending a new E-Mail. The **Collected addresses** folder is located below your personal contact folder.

- **Automatically collect contacts in the "Collected addresses" folder while reading E-Mail messages**
  Defines whether new E-Mail addresses are automatically collected in the **Collected addresses** folder when reading a new E-Mail. The **Collected addresses** folder is located below your personal contact folder.
- **Ask for mailto link registration**
  Defines whether the groupware can ask for a mailto link registration.

Also see:

Settings for composing E-Mail messages (S. 102)

Externally linked images in E-Mail messages (p. 254)
Show e-mail authenticity (p. 255)
Using a whitelist (p. 256)

5.11.2 Settings for composing E-Mail messages

How to use the settings for composing E-Mail messages:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select the entry **E-Mail** in the side bar. Click on **Compose**.

The following settings are available by default:

Format email messages as
Defines the format in which email messages are sent:

- **HTML**
  The E-Mail is sent with HTML markup. You can format the E-Mail text.
- **Plain text**
  The E-Mail text is sent as plain text without formatting.
- **HTML and plain text**
  The E-Mail is sent with HTML markup and additionally as plain text.

Default font style
Defines the preset font style for E-Mail text in HTML format.

Forward E-mail messages as
Specifies how an E-Mail text is sent when forwarding the E-Mail.

- **Inline**
  The text is sent within the new E-Mail text.
- **Attachment**
  The text is sent as attachment to the new E-Mail.

Advanced settings

- **Append vCard**
  Specifies whether your contact data will be attached to a new email in the vCard format.
- **Insert the original Email text into a reply?**
  Specifies whether the original email text is appended to an email reply.
- **Confirm recipients when replying to a mailing list**
  Defines whether you have to confirm the recipient when replying to a mailing list.
- **Auto-save email drafts**
  Specifies the interval for saving an E-Mail while being composed to the *Drafts* folder.
- **Default sender address**
  Specifies the pre-set sender address for new E-Mail messages.
  Note: The sender's name is displayed in front of the sender address. If you enter a name in the **Your name** input field in the Account settings, this name overwrites the preset sender name.
- **Always add the following recipient to blind carbon copy (BCC)**
  To send each outgoing E-Mail as blind copy (BCC) to an E-Mail address, enter the wanted E-Mail address in this field.

Also see:

Settings for receiving E-Mail messages. (S. 100)

6 Address Book

Learn how to work with the *Address Book* application.

- the *Address Book* components
- view contacts
- view or save contact attachments
- create and add contacts from various sources
- combine several contacts into distribution lists
- add address books
- edit and organise contacts
- search for contacts
- share contacts with other users
- access contacts in your social networks
- use the *Address Book* settings

How to launch the *Address Book* app:

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

6.1 The *Address Book* Components

The *Address Book* app includes the following components.

- The Address Book search bar
- The Address Book tool bar
- The Address Book folder view
- The Address Book navigation bar
- The Address Book display area
    - The Address Book list
    - The Address Book detail view
- The contact editing window
- The distribution list editing window

6.1.1 The Address Book search bar

Enables you to search for contacts.

The search bar is displayed if the folder view is visible. In order to display the folder view, click on **View** in the tool bar. Enable **Folder view**.

Also see:

General description of the search bar (p. 28)
Searching for contacts (p. 124)
Displaying contacts (p. 111)

6.1.2 The Address Book tool bar

Contains functions for adding, editing and organising contacts. Notes:

- Some functions are only available if you opened an address book for which you have the appropriate permissions to create or edit objects.
- Some buttons are only displayed if the selected contacts have an E-Mail address.

Content

- **New**. Creates a new contact or a new distribution list.
- **Send e-mail**. Sends an E-Mail to the contact.
- **Invite**. Invites the contact to an appointment.
- **Edit**. Edits the contact's data.
- **Delete**. Deletes the contacts selected by you.
- **More actions** icon ☰. Opens a menu with additional functions.
  Notes:
  - Some buttons might not be displayed if you do not have the appropriate permissions.
  - Depending on the address book or the contact's data, some buttons might be sorted differently or might not be available.
- **View**. Opens a menu with check boxes for controlling the view.
  - **Folder view**. Opens or closes the folder view.
  - **Check boxes**. Displays a check box next to each contact in the list. This allows selecting multiple contacts to edit them at once.

Also see:

General description of the tool bar (p. 29)
Adding Contacts (p. 114)
Organising Contacts (p. 118)

6.1.3 The Address Book folder view

Displays the address books.

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

Content

- *My address books*. Contains your personal address books.
- *Public address books*. Contains address books shared with all users.
- *Shared address books*. Contains address books shared with you by other users.

Depending on the configuration, the content can differ from this information.

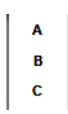
Functions

- If clicking on an address book, its contacts are displayed.
- The **Actions** icon next to the selected address book offers functions for organising data and for exchanging data.
- The **Add new address book** button allows creating a new private or public address book.
- The **My contact data** button opens a dialogue for changing your contact data in the global address book.
- The **Subscribe address book** button below the address books allows to add contacts from other accounts.

Also see:

General description of the folder view (p. 30)
Folders (p. 228)
Adding Address Books (p. 117)

6.1.4 The Address Book navigation bar



Displays the contacts in the list starting with the letter selected.

Also see:

Displaying contacts (p. 111)

6.1.5 The Address Book display area

Contains the contacts list and a contact's detail view.

Also see:

General description of the display area (p. 31)

6.1.6 The Address Book list

Displays a list of contacts in the opened address book.

Content

- The following details are displayed for each contact: name, company, primary E-Mail address.
- The text above the list contains the name of the selected address book. The number corresponds to the number of contacts in the selected address book.
- Names that start with a figure or a special character are displayed below **#** at the top of the list. Names that start with a special sign are displayed below **Ω** at the bottom of the list.

Functions

- To select multiple contacts, enable the **Checkboxes** option in the **View** drop-down in the tool bar. You can also use your system's multi-selection functions.
  In order to select all contacts in the address book, enable the **Select all** checkbox above the list.
- If clicking on a contact, its data is displayed in the detail view [108].
- To adjust the list width, hover over the line between the list and the detail view. Drag the border to the left or to the right.

Also see:

Searching for contacts (p. 124)

6.1.7 The Address Book detail view

Shows the data of the contact that you selected in the list. If double-clicking on the contact in the list, the data are displayed in a window.

Content

- Picture, name, job position, profession
- E-Mail addresses. If clicking on an E-Mail address, the page for sending a new E-Mail is displayed.
- Business and private phone numbers
- Business and private addresses. In the address book settings, you can define whether a map service should be used when clicking on an address.

The extent of information displayed can vary.

Also see:

Viewing or Saving Contact Attachments (p. 112)
Sending Email Messages from within an address book (p. 118)
Organising Contacts (p. 118)

6.1.8 The contact editing window

This window is used when creating a new contact or editing an existing one.

In order to open the window, do one of the following:

- Click on **New** in the tool bar. Click on **Add contact**.
- Select a contact. Click on **Edit** in the tool bar.

Content

- Note: To display all elements, enable **Show all fields** in the button bar.
  The title bar includes the following elements:
  - window title
  - icons for adjusting the window position, cancel icons
- contact picture, name, company
  Click on the contact picture to edit it or to upload a new contact picture.
- Contact data
  - **Personal Data**. Enter the title, name, birthday, and additional personal data.
    This contact is private. If the contact is not to be displayed when its address book is being shared, enable this checkbox.
  - **Job description**. Enter the contact's business data in those fields.
  - **Messaging**. Enter E-Mail addresses or other messaging addresses.
  - **Phone & fax numbers**. Enter private and business phone and fax numbers.
  - **Private address**, **Business address**, **Address Other**. Enter the postal address.
  - **Comment**. You can enter any information here.
  - **User fields**. You can enter additional information here.
- **Add attachments**. Adds files.
- button bar
  - **Save**. Saves the current data of the contact. Closes the Format window.
  - **Cancel**. Cancels creating or editing the contact.
  - **Show all fields**. Defines whether all available data fields are displayed. By default, only the data fields that are most frequently used are displayed.

Also see:

General description of the editing window (p. 34)

Creating a new contact (p. 114)
Editing contacts (p. 119)

6.1.9 The distribution list editing window

This window is used when creating a new distribution list or editing an existing one.

In order to open the window, do one of the following:

- Click on **New** in the tool bar. Click on **Add distribution list**.
- Select a distribution list. Click on **Edit** in the tool bar.

Content

- The title bar includes the following elements:
  - window title
  - icons for adjusting the window position, cancel icons
- **Name** input field
  Enter a meaningful name for the new distribution list in this field.
- Input field below *Participants*.
  Enter the E-Mail addresses of the distribution list's contacts in this field. While entering the recipients, matching suggestions are displayed. To accept a suggestion, click on it.
  Select contacts icon. Opens a window for selecting contacts from an address book.
- button bar
  - **Create list**. Creates the list. Closes the Format window.
    When editing an existing distribution list, the button is called **Save**.
  - **Cancel**. Cancels creating or editing the distribution list.

Also see:

General description of the editing window (p. 34)

Creating Distribution Lists (p. 116)
Editing contacts (p. 119)

6.2 Displaying contacts

Your personal address book can be found in the folder view below *Contacts*. In the address book settings, you can define the address book that is to be opened as default.

How to display a contact:

1. Select an address book in the folder view.
2. In order to display contacts with a certain initial letter, click a letter in the **navigation bar**.
3. Click on a contact in the list. The contact's data is displayed in the detail view.

Additional functions:

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

Also see:

Navigating within the folder structure (p. 231)
Searching for contacts (p. 124)
Viewing or Saving Contact Attachments (p. 112)
The Halo View (p. 113)
The Address Book navigation bar (p. 107)
The Address Book detail view (p. 108)
The Address Book list (p. 108)

6.3 Viewing or Saving Contact Attachments

The file names of contact attachments are displayed in the display area below the contact name. The following functions are available:

- display the attachment in the *Viewer*
- download the attachment
- save the attachment to *Drive*

Note: Depending on the attachment's file format, the available function might differ.

How to use the contact attachment functions:

1. Select a contact with an attachment.
2. Click on an attachment's name in the detail view. Click on the function wanted.

Tip: If a contact contains several attachments, an action can be executed for all attachments at once. To do so, click on **All attachments**.

Also see:

Displaying contacts (p. 111)
The Address Book detail view (p. 108)
The Address Book list (p. 108)

6.4 The Halo View

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

- addresses, E-Mail addresses, phone numbers
- 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.

Also see:

General description of the pop-up (p. 32)
Displaying contacts (p. 111)
The Address Book detail view (p. 108)

6.5 Adding Contacts

The following options are available:

- Creating a new contact
- Adding attachments
- Adding a contact from a vCard attachment
- Creating Distribution Lists

Information on importing contacts from various files can be found in Importing contacts (page 121)

6.5.1 Creating a new contact

How to create a new contact:

1. Open an address book in the folder view.
   Note: Open an address book for which you have the appropriate permissions to create objects.
2. Click on **New** in the tool bar. Click on **Add contact**.
3. Enter the data.
   To display all input fields, enable **Show all fields**.
4. Click on **Save**.

Additional functions:

- To add a contact picture, click on the empty contact picture. The *Edit image* window opens.
  - To upload an existing picture, click the **Upload image** icon.
  - To make a new picture with the device camera, click the **Take photo** icon.

  You can adjust the image section with the zoom and by moving or rotating the photo.
  Click on **OK**. Click on **Save**. The photo will be inserted.
  In order to edit the photo, click on it.

Additional instructions:

- Adding attachments (p. 115)

Also see:

Creating Distribution Lists (p. 116)
Adding a contact from a vCard attachment (p. 115)
The contact editing window (p. 109)

6.5.2 Adding attachments

How to add attachments in the contact editing window:

1. Click on **Add attachments** below *Attachments*.
2. Select one or several 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.

Also see:

Creating a new contact (p. 114)
Creating Distribution Lists (p. 116)
Adding a contact from a vCard attachment (p. 115)
The contact editing window (p. 109)

6.5.3 Adding a contact from a vCard attachment

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

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

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

Also see:

Creating a new contact (p. 114)
Adding attachments (p. 115)
Creating Distribution Lists (p. 116)

6.6 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 and add contacts.

How to create a new distribution list:

1. Open an address book in the folder view.

   Note: Open an address book for which you have the appropriate permissions to create objects.
2. Click on **New** in the tool bar. Click on **Add distribution list**.
3. Enter a name for the distribution list in the **Name** field.
4. Enter a participant's E-Mail address in the *Participants* field.
   - While entering the E-Mail address, several matching suggestions are displayed. To accept a suggestion, click on it.
   - To select contacts from an address book, click the **Address book** icon on the right side of the input field.

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

Also see:

Selecting contacts from an address book (S. 69)
Creating a new contact (p. 114)
The distribution list editing window (p. 110)

6.7 Adding Address Books

The following options are available:

- Adding address books
- Subscribing to external address books

Also see:

Folders (p. 228)
Organising Contacts (p. 118)

6.7.1 Adding address books

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

How to create a new personal address book:

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

Also see:

Subscribing to external address books (p. 117)
Organising Contacts (p. 118)

6.7.2 Subscribing to external address books

You can subscribe to external address books, e.g. from your social networks. The following applies:

- Changes that you apply to the subscribed address book in the groupware are not transferred to the external address book.
- Changes that you apply to the external address book can be transferred to the groupware by refreshing subscribed data.

How to subscribe to external address books:

1. In the folder view, click on **Subscribe to address book**. The *Subscribe to address book* window opens.
2. Click one of the icons. Depending on the data source, the procedure varies.
   - For some data sources, a new browser window opens. Log in with your credentials to grant access to the address data.
   - If the provider asks you for the permission to access the data, grant this permission.
   - For some data sources, you have to enter your credentials for the data source in the *Subscribe to address book* window.

Tip: An address book with subscribed contacts is marked with the **Subscribed** icon . If clicking the icon, the subscriptions settings are opened.

Also see:

refresh subscribed data (p. 251)
Managing subscribed folders (p. 251)
Adding address books (p. 117)

6.8 Organising Contacts

Some of the techniques for organising contacts require that address books have already been set up by you. Information on creating address books can be found in Adding Address Books (page 117).

The following options are available:

- Sending Email Messages from within an address book
- Inviting contacts to an appointment
- Editing contacts
- Moving or copying contacts
- Sending contacts as vCard
- Adding contacts as XING contacts
- Inviting contacts to XING
- Importing contacts
- Exporting contacts
- Printing Contacts
- Deleting contacts

6.8.1 Sending Email Messages from within an address book

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

How to send an Email from within an address book:

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

Also see:

Sending a new email (S. 68)

6.8.2 Inviting contacts to an appointment

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

How to invite contacts to an appointment:

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

Also see:

Creating new appointments (p. 147)

6.8.3 Editing contacts

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

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

How to edit a contact or distribution list:

1. Select a contact or a distribution list from the list.
2. Click on **Edit** in the tool bar. The data are displayed.
   Note: The contact editing window shows the data that is most frequently used. To display all elements, enable **Show all fields** in the button bar.
3. Edit the data.
4. Click on **Save**.

Also see:

The contact editing window (p. 109)
The distribution list editing window (p. 110)

6.8.4 Moving or copying contacts

You can move or copy contacts or distribution lists to another address book.

Prerequisite: You need to have the appropriate permissions to create objects in the target address book folder.

Notes:

- You cannot move or copy contacts or distribution lists to the global address book.
- You cannot move contacts from the global address book.

How to move or copy contacts to another address book:

1. Select a single contact or distribution list, or multiple contacts or distribution lists from the list.
2. Click the **More actions** icon in the tool bar. Click on **Move** or **Copy** in the menu.
   A window opens.
3. Select an address book. You can create a new address book by clicking on **Create folder**.
   Click on **Move** or **Copy**.

Tip: You can also move the selected objects by dragging the objects from the folder view to an address book.

Also see:

Adding address books (p. 117)

6.8.5 Sending contacts as vCard

You can send contacts or distribution lists as vCard attachment to an E-Mail.

How to send a contact as a vCard attachment:

1. Select a single contact or distribution list, or multiple contacts or distribution lists from the list.
2. Click the **More actions** icon ≡ in the tool bar. Click on **Send as vCard** in the menu.
3. Fill in the details for sending the E-Mail.

Also see:

Sending a new email (S. 68)
Exporting contacts (p. 122)

6.8.6 Adding contacts as XING contacts

You can add a contact as an XING contact if you are not connected with this contact in XING. The contact and you need to have XING accounts.

How to add a contact as an XING contact:

1. Select a contact from the list.
2. Click the **More actions** icon ≡ in the tool bar. Click on **Add to XING** in the menu.

Also see:

Inviting contacts to XING (p. 121)

6.8.7 Inviting contacts to XING

You can invite a contact to XING if this contact does not have an XING account yet.

How to invite a contact to XING:

1. Select a contact from the list.
2. Click the **More actions** icon ≡ in the tool bar. Click the menu entry **Invite to Xing**.

Also see:

Adding contacts as XING contacts (p. 120)

6.8.8 Importing contacts

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

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

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

How to import contacts from a file:

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

Result: The contacts are added to the address book.

Also see:

Exporting contacts (p. 122)

6.8.9 Exporting contacts

You can export contacts or distribution lists to those formats:

- vCard. You can e.g. use this format to exchange contacts with other E-Mail applications.
- CSV You can use this format to export contacts to spreadsheet formats.

You can export individual contacts or distribution lists or all objects from an address book.

How to export single contacts or distribution lists:

1. Select a single contact or distribution list, or multiple contacts or distribution lists from the list.
2. Click the **More actions** icon ☰ in the tool bar. Click the **Export** menu item. The *Export selected* window opens.
3. Select a format.
   To export contacts and distribution lists, enable **With distribution lists**.
4. Click on **Export**. Complete the entries.

How to export all contacts from an address book:

1. Select a personal or public address book in the folder view.
2. Click the **Actions** icon ☰ next to the folder name. Click on **Export**. The *Export folder* window opens.
3. Select a format.
   To export contacts and distribution lists, enable **With distribution lists**.
4. Click on **Export**. Complete the entries.

Also see:

Sending contacts as vCard (p. 120)
Importing contacts (p. 121)

6.8.10 Printing Contacts

You can print the data of a single contact or of multiple contacts. You can select between different print layouts.

How to print a contact's data:

1. Open an address book in the folder view. Select an individual contact or multiple contacts from the list.
2. Click on **More actions** in the tool bar. Click on **Print** in the menu. The *Select print layout* window opens.
3. Select a print layout. Click on **Print**.
   Complete the steps for starting the printing process.
4. Close the print preview window.

6.8.11 Deleting contacts

You can delete contacts or distribution lists. If you delete a distribution list, the distribution list's contacts are kept.

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

How to delete contacts:

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

Result: The items will be deleted.

6.9 Searching for contacts

In order to search for specific contacts, you can use the following search criteria:

- search terms for name, E-Mail address, phone number, department, address
  Depending on the configuration, you can use department as search term.
- address books that are to be searched
- type: all, contact, distribution list

How to search for contacts:

1. Click on the **Search** input field. Additional icons are displayed.
2. Enter a search term in the input field. The search menu opens.

   Define the data sources to be searched by clicking on an entry in the search menu.
   - If clicking on the search term or pressing enter, the following data sources are searched: name, address, phone number
   - In order to only search in names, click on **in names** in the search menu.
     Accordingly, you can limit the search to E-Mail addresses, phone numbers, departments or addresses.
   - In order to search for a contact matching the search term, click on a name in the search menu.

   The search results are displayed in the list that is shown in the display area.
3. To select an address book for the search, click the **Options** icon ▼ in the input field. The address book that is searched, is displayed in the **Folder** drop-down. To select another address book, open the drop-down.
   If you select **All folders**, all private, public, and shared address books are searched.
4. To limit the search to contacts or distribution lists, click the **Options** icon ▼ in the input field. Open the **Type** drop-down. Select a type.
5. To refine the search results, enter additional search terms: To remove a search term, click the **Remove** icon ✖ next to the search term.
6. In order to finish the search, click the **Close** icon ⊗ in the input field.

6.10 Contacts in Teams

You can share your contacts with internal and external partners. Depending on the requirements, different methods exist.

- The *Global address book* provides the contact data for all users. Each user can use those contacts.
- To make additional contacts available for internal users or external partners, proceed as follows:
  - Create a new personal or public address book where you can copy or move the wanted contacts to.
  - Share this address book.

  You can also share an existing address book.
- If another internal user shared an address book with you, you can access this address book in the folder view.

6.11 Address Book Settings

How to use the address book settings:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Address Book** in the side bar.

The following settings are available:

My contact data button
In order to change your personal contact data in the global address book, click on this button.
Also see: Changing Personal Contact Data (p. 40)

Display of names
Specifies the order in which a contact's first name and surname are displayed in the address book.

Initial folder
Defines the address book that is opened as default after having logged in.

Link postal addresses with map service
Defines the map service to be used for displaying the address when clicking on a contact's postal address in the address book.

7 Calendar

Learn how to work with the *Calendar* application.

- the *Calendar* components
- display appointments
- view or save appointment attachments
- create appointments
- answer appointment invitation
- add calendars
- manage appointments
- search for appointments
- share calendars with other users
- manage participant groups
- manage resources
- use the *Calendar* settings

How to launch the *Calendar* app:

Click the **App Launcher** icon ▦ in the menu bar. Click on **Calendar** in the App Launcher.

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

7.1 The *Calendar* Components

The *Calendar* app includes the following components.

- The Calendar search bar
- The Calendar tool bar
- The mini calendar
- The Calendar folder view
- The Calendar display area
    - Day, Work week, Week, Month or Year calendar view.
    - The date picker
    - The Calendar pop-up
    - The Calendar list
    - The Calendar detail view
- The scheduling view
- The appointment editing window:

7.1.1 The Calendar search bar

Enables you to search for appointments.

The search bar is displayed if the folder view is visible. In order to display the folder view, click on **View** in the tool bar. Enable **Folder view**.

Also see:

General description of the search bar (p. 28)
Searching for Appointments (p. 166)
Viewing Appointments (p. 140)

7.1.2 The Calendar tool bar

Contains functions for adding, editing and organising appointments. Note: Some functions are only available if you opened a calendar for which you have the appropriate permissions to create or edit objects.

Content

- **New**. Creates a new appointment.
- **Scheduling**. Opens the scheduling view for scheduling appointments with multiple participants.
- If a calendar view is selected in **View**: **Today** button. Selects the time frame with the current day.
- **View**. Opens a menu with checkboxes for controlling the view.
  - **Day**, **Work week**, **Week**, **Month** or **Year**. Selects a calendar view.
  - **List**. Activates the list view.
  - **Folder view**. Opens or closes the folder view.
  - **Mini calendar**. Opens or closes the mini calendar.
  - If the list view is selected and **checkboxes** are enabled, checkboxes for marking objects are displayed in the list.
  - **Print**. Opens the print preview for printing a calendar sheet.

If you select an appointment in the list view, additional elements are displayed:

- **Edit**. Edits an appointment's data.
- **Status**. Changes the status of the appointment confirmation.
- **Delete**. Deletes the appointments selected by you.
- **More actions** icon ☰. Opens a menu with additional functions.

Also see:

General description of the tool bar (p. 29)
The mini calendar (p. 131)
Day, Work week, Week, Month or Year calendar view. (p. 133)
Creating Appointments (p. 146)
Managing Appointments (p. 159)

7.1.3 The mini calendar

Displays a clear overview of a month, year or several years.

In order to display the mini calendar, click on **View** in the tool bar. Enable **Folder view** and **Mini calendar**.

Content

- **Browse** icons < >. If clicking the icons, the displayed time range is browsed: one month, one year, 12 years.
- If a month is displayed:
  - The header contains the name of the month and the year.
  - Calendar weeks and the days of the month are displayed.
    The current day is highlighted.
  - If clicking on a day, the respective time range is used in the calendar view.
  - If clicking on the name of the month in the header, the year is displayed.
- If a year is displayed:
  - The header contains the year.
  - The names of the months are displayed.
  - If clicking on a month name, the month is displayed.
  - If clicking on the year in the header, a time range of 12 months is displayed.
- If a time range of 12 months is displayed:
  - The header contains the start and end of the time range.
  - The years within the time range are displayed.
  - If clicking on a year, the name of the months of the year are displayed.

The date picker offers similar functions.

Also see:

The date picker (p. 134)
The Calendar tool bar (p. 130)
Day, Work week, Week, Month or Year calendar view. (p. 133)

7.1.4 The Calendar folder view

Displays the calendars.

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

Content

- *My calendars*. Contains your personal calendars.
- *Public calendars*. Contains calendars shared with all users.
  The *All my public appointments* calendar contains the public appointments you participate in.
- *Shared calendars*. Contains calendars shared with you by other users.

Depending on the configuration, the content can differ from this information.

Functions

- If clicking on a calendar, appointments within that calendar are displayed.
- If enabling the checkbox next to a calendar, this calendar's appointments are displayed in addition to the current calendar's appointments.
- If double-clicking on a calendar, only the appointments in this calendar are displayed.
  If double-clicking on this calendar again, the previously displayed calendars are shown again.
- The **Actions** icon next to the selected calendar offers functions for organising data, for exchanging data and for selecting a calendar colour.
  Depending on the calendar, a function for displaying the calendar properties is available.
- The **add new calendar button** opens a menu with functions for creating, subscribing to or importing calendars.

Also see:

General description of the folder view (p. 30)
Viewing Appointments (p. 140)
Using calendar colours (p. 162)
Folders (p. 228)
Adding Calendars (p. 155)

7.1.5 The Calendar display area

Either includes a calendar view or a list view of the appointments. In order to select a view, click on **View** in the tool bar.

Also see:

General description of the display area (p. 31)

7.1.6 Day, Work week, Week, Month or Year calendar view.

Displays the appointments of the calendars selected in the folder view, for the chosen time range.

In order to display the calendar view, click on **View** in the tool bar. Enable one of the following settings: **Day**, **Work week**, **Week**, **Month** or **Year**.

Content

- The **Browse** icons < > enable you to browse back and forth.
- If clicking on an appointment, its data is shown in the pop-up.

Contents of the **Day** view

- Day of the week, date, calendar week. Clicking on it opens the date picker.
- **Split** button. Displays the calendars selected in the folder view, in separate columns.
- The red line in the calendar sheet displays the current time.
- On the left side of the calendar sheet, the timezone is displayed above the dates.
  To add an additional column with dates in another timezone, click on the timezone.
- If there are additional appointments above or below the visible calendar sheet, arrows are displayed at the top or the bottom of the calendar sheet.

Contents of the **Work week** and **Week** view.

- Month, year, calendar week. Clicking on it opens the date picker.
- Days of the week. The current weekday is highlighted in red.
  In the calendar settings, you can define the number of days for a work week and the first day of a work week.
- If clicking on a weekday, the window for creating a new whole day appointment opens.
- The red line in the calendar sheet displays the current time.
- On the left side of the calendar sheet, the timezone is displayed above the dates.
  To add an additional column with dates in another timezone, click on the timezone.
- If there are additional appointments above or below the visible calendar sheet, arrows are displayed at the top or the bottom of the calendar sheet for the respective day.

Contents of the **Month** view

- Days of the week.
  Month, year.
- The calendar weeks are displayed on the left side of the calendar sheets.

Contents of the **Year** view

- Year. If clicking on it, a window for selecting a year opens.
  The calendar sheet shows an overview of a year's days and months. Appointments are not displayed.
- If clicking on a month, the calendar is opened in the month view
  Note: In the *Year* view, no appointments are displayed.

Also see:

Viewing Appointments (p. 140)
Creating Appointments (p. 146)
Managing Appointments (p. 159)

7.1.7 The date picker

Shows a calendar for selecting a date.

In order to display the date picker, do one of the following:

- If the mini calendar is not visible, click on the date on the upper left side of the *Day*, *Workweek* or *Week* calendar view.
- Click on the date on the upper left side of the scheduling view.
- Click on a date input field in the appointment editing window.

Content

- **Browse** icons < >. If clicking the icons, the displayed time range is browsed: one month, one year, 12 years.
- If a month is displayed:
  - The header contains the name of the month and the year.
  - Calendar weeks and the days of the month are displayed.
  - If clicking on a day, the date picker closes. The selected date will be used.
    If clicking on **Today**, the date picker closes. The current date will be used.
  - If clicking on the name of the month in the header, the year is displayed.
- If a year is displayed:
  - The header contains the year.
  - The names of the months are displayed.
  - If clicking on a month name, the month is displayed.
  - If clicking on **Today**, the date picker closes. The current date will be used.
  - If clicking on the year in the header, a time range of 12 months is displayed.
- If a time range of 12 months is displayed:
  - The header contains the start and end of the time range.
  - The years within the time range are displayed.
  - If clicking on a year, the name of the months of the year are displayed.
  - If clicking on **Today**, the current month is displayed. The current day is highlighted.

The mini calendar offers similar functions.

Also see:

Using the date picker (p. 148)

The mini calendar (p. 131)
Day, Work week, Week, Month or Year calendar view. (p. 133)
The appointment editing window: (p. 138)
The task editing window (p. 179)

7.1.8 The Calendar pop-up

Shows the data of an appointment that you select in the calendar view.

Content

- **Accept**, **Decline**, **Change status**, **Edit**, **Follow-up**, **Delete** buttons.
  Note: Depending on the configuration, the following limitations might prevail:
  - Some buttons for appointments in your private calendars are only displayed if you have the respective permissions for executing the function.
  - If you are a participant, you cannot change or delete the appointment.
  - If you are the organiser, you cannot change your status.
- If clicking the **More actions** icon ☰ a menu with additional functions opens.

Below the buttons, the same information are shown as in the Detail view in the *List* view.

Also see:

General description of the pop-up (p. 32)
Day, Work week, Week, Month or Year calendar view. (p. 133)
Managing Appointments (p. 159)
Creating a follow-up appointment (p. 152)

7.1.9 The Calendar list

Displays a list of the appointments of the calendars selected in the folder view.

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

Content

- Each day with appointments shows a header with the date.
- The following details are displayed for each appointment: date, time, colour, private appointment icon, subject and location.

Functions

- If clicking on an appointment, its data is displayed in the detail view.
- To select multiple appointments, enable the **Checkboxes** option in the **View** drop-down in the tool bar.
  You can also use your system's multi-selection functions.
  In order to select all appointments in the calendar, enable the **Select all** checkbox above the list.
- If clicking the **Sort** icon ↓↑ above the list, a menu opens that allows sorting appointments.
- To adjust the list width, hover over the line between the list and the detail view. Drag the border to the left or to the right.

Also see:

Searching for Appointments (p. 166)

7.1.10 The Calendar detail view

Shows the data of the appointment that you select in the list. If double-clicking on the appointment in the list, the data are displayed in a window.

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

Content

- Subject
- Date, time, time zone
- For recurring appointments: the recurrence type
- Appointment location, if entered
- Appointment description, if entered
- The names of the participants. The organiser is mentioned first.
  If clicking on a name, a *pop-up* opens. It displays information about the contact.
    - The person's contact data.
    - If you exchanged E-Mail messages with this person, they are displayed below *Recent conversations*.
    - If you have appointments scheduled with this person, they are displayed below *Shared appointments*.
    - Information about this person from social networks. You can use the available buttons to open this person's profile.

  If clicking on an appointment or an E-Mail, an additional pop-up opens.
- If the appointment has several participants, the number of participants that accepted, declined or have not replied yet are shown on the top right side above the list of participants. In order to filter the list of participants, click the icons.
- Names of existing resources. If clicking on a resource a *pop-up* opens.
- If the appointment includes external participants, their names are displayed below *External participants*.
- If clicking on **Details**, addiitional information is displayed:
    - the appointment's organiser
    - availability
    - which calendar
    - who created the appointment and when
    - who was the last person to modify the appointment

Also see:

Editing appointments (p. 160)
Changing the appointment confirmation or status (p. 161)
Deleting appointments (p. 165)
Printing appointments (p. 164)
Moving appointments to another calendar (p. 162)

7.1.11 The scheduling view

Shows the appointments of the participants that you add to a scheduled appointment.

In order to display the scheduling view, do one of the following:

- Click on **Scheduling** in the tool bar.
- Click on **Find a free time** in the appointment editing window.

Content

- The **Browse** icons ‹ › enable you to browse back and forth.
- Start and end date of the selected time range and the calendar week. If clicking on it, the date picker opens that allows setting a different time range.
- Icons for adjusting the zoom ratio for the calendar sheet view
- **Options** button. If clicking on it, a menu with several functions opens:
  - **Compact**. Defines the line height for displaying the participants and resources
  - **Show fine grid**. Defines a smaller grid spacing for the time grid.
  - **Free**. Defines whether free appointments are displayed. Such appointments do not cause conflicts.
  - **Reserved**. Defines whether reserved appointments are displayed.
  - **Reserved**. Defines whether reserved appointments are displayed.
  - **Week** or **Month** date range. Defines the date range that is displayed in the scheduling view.
  - **Hide non-working time**. Defines whether times that are outside the working hours are hidden.
- If the scheduling view was opened from the tool bar: **Close** icon ✖
- An input field for participants and resources
- A list of participants. The following information are shown for each participant: Name, **Remove** icon, appointments in the calendar sheet.
- The calendar sheet of the selected time range.
- Scroll bar. The scroll bar allows setting the part of the time range to be displayed.
- **Save as distribution list** button. Saves the added participants in a new distribution list.
- Elements for closing the scheduling view:
  - If the scheduling view was opened from the tool bar: **Create appointment** button
  - If the scheduling view has been opened in an appointment editing window: **Cancel** button, **Create appointment** button.

Also see:

The date picker (p. 134)
The appointment editing window: (p. 138)
Using the scheduling view (p. 151)
Creating new appointments (p. 147)
Editing appointments (p. 160)

7.1.12 The appointment editing window:

This window is used when creating an appointment or editing an appointment.

In order to open the window, do one of the following:

- Click on **New** in the tool bar.
- Select an appointment in the list view. Click on **Edit** in the tool bar.
- Click on an appointment in a calendar view. Click on **Edit** in the pop-up.

Content

- The title bar includes the following elements:
  - window title
  - icons for adjusting the window position, cancel icons
- Appointment data
  - **Subject** input field. Enter the subject in this field. The subject is displayed as appointment title.
  - **Location** button. Here, you can enter the location where the appointment is to take place.
  - **Starts on** and **Ends on**. Set the start and end date of the appointment. Clicking on it opens the date picker.
    If **All day** is disabled, you can set start and end times.
  - If clicking on a time zone button next to a time, a window opens that allows selecting a time zone for the appointment's start and end time. You can set frequently used time zones as favourites in the calendar settings.
  - **All day**. Defines whether the appointment is supposed to last whole days.
  - **Find a free time**. Opens the scheduling view. In this view, you can find a free time when scheduling an appointment with several participants.
  - **Repeat**. Defines whether the appointment is supposed to last whole days. Examples can be found in the questions about appointments and tasks.
  - **Description** input field. You can enter a description for the appointment in this field.
  - **Calendar**. Shows the calendar in which the appointment will be created. If clicking on it, a menu for selecting a calendar opens.
- Appointment view
  - **Show as free**. Defines whether the appointment is displayed as free. Enable this checkbox to avoid conflicts with overlapping appointments.
  - **Appointment colour**. You can define the colour in which the appointment is displayed. If the **No colour** checkbox is enabled, the appointment is displayed in the colour of the calendar. In order to set a different colour for the appointment, click on a colour field.
  - **Visibility**. Defines the visibility of the appointment in a shared calendar:
    - **Standard**. The appointment is visible to all users.
    - **Private**. Users that are no participants can only view the appointment date.
    - **Secret**. Users that are not participants cannot view the appointment.
- **Reminder**. Defines when and how you will be reminded about the appointment's due date.
- **Add contact/resource** input field. Enter the names of the participants or resources.
- **Add attachments**. Adds files.
- button bar
  - **Create**. Saves the current data of the appointment. Closes the Format window.
  - **Cancel**. Cancels creating or editing the appointment.

Also see:

General description of the editing window (p. 34)

The date picker (p. 134)
The scheduling view (p. 137)

Creating new appointments (p. 147)
Editing appointments (p. 160)

7.2 Viewing Appointments

The following options are available:

- Displaying appointments in the calendar view
- Displaying multiple timezones
  In the calendar views *Day*, *Work week*, and *Week*, you can display the day times in multiple time zones.
- A description of the various appointment views in the calendar views views can be found in How are appointments displayed in a calendar view?
- Displaying appointments in the list view

7.2.1 Displaying appointments in the calendar view

How to display appointments in the calendar view:

1. Click on **View** in the tool bar. Select one of the following entries: **Day**, **Work week**, **Week** or **Month**.
2. Open a calendar in the folder view.
3. In order to browse the calendar, use the navigation bar on top of the calendar sheet.
   In order to display the time frame with the current day, click on **Today** in the tool bar.
4. Click on an appointment in the calendar sheet. The calendar's data is displayed in the pop-up.

Additional functions:

- To view the appointments of other calendars, enable the checkboxes next to the respective calendars. Note: if a subscribed calendar is marked with an exclamation mark, there is an issue with retrieving this calendar's appointments. To get additional information, click on the exclamation mark.
- If you selected the **Day** view, you can display the selected calendars next to each other by clicking on **Split**.
- To only view the appointments of a single calendar, the following options are available:
  - Double-click on the calendar in the folder view.
    To display the previously displayed calendars again, double-click on this calendar again.
  - Click the **Actions** icon ☰ next to the calendar. Click on **Show this calendar only** in the menu.
  - Disable the checkboxes next to the other calendars.

Also see:

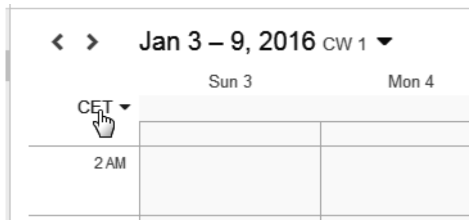
Navigating within the folder structure (p. 231)
How are appointments displayed in a calendar view? (p. 143)
Searching for Appointments (p. 166)
Displaying appointments in the list view (p. 144)
Displaying multiple timezones (p. 142)
Viewing or Saving Appointment Attachments (p. 145)
The Calendar folder view (p. 132)
Day, Work week, Week, Month or Year calendar view. (p. 133)
The date picker (p. 134)
The Calendar pop-up (p. 135)

7.2.2 Displaying multiple timezones

In addition to the default timezone, you can display timezones that have been marked as favourites by you. The default timezone can be changed in the basic settings

How to display multiple timezones in a calendar view:

1. Click on **View** in the tool bar. Select one of the following entries: **Day**, **Work week** or **Week**.
2. Click on the **Timezone** button on the left side above the calendar sheet.



A menu opens. Enable a timezone in the menu below *Favorites*.
By clicking on **Manage favourites** you can add/remove timezones to/from favourites.

Also see:

Displaying appointments in the calendar view (p. 141)
Day, Work week, Week, Month or Year calendar view. (p. 133)

7.2.3 How are appointments displayed in a calendar view?

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

- Your availability displayed during the appointment duration: Reserved, Free
- Your appointment confirmation status: Accepted, Tentative, Declined
- Visibility of the appointment in shared calendars for users who are not participants: Standard, Private, Secret
- If there is enough space, icons for the following appointments are displayed in the Day, Workweek and Week calendar view: serial appointment, appointment with participants, private appointment, secret appointment, tentative appointment

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

Display of appointments that are visible to all
Depending on the displayed availability, public appointments are displayed in the following colours and patterns:

- Free: Selected colour with broad diagonal stripes
- Booked: Selected colour

If you do not select a colour, the colour of the calendar is used. Depending on the appointment confirmation status, public appointments are displayed as follows:

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

Note: In public or shared calendars you will only see the colours of appointments that have been created by you.

Private or secret appointments display
Private and secret appointments are displayed as follows:

- Private appointments are displayed in grey and are marked with the **Private** icon .
  Users that are no participants can only view the appointment date in shared calendars.
- Secret appointments are displayed in grey and are marked with the **Private** icon .
  Users that are not participants cannot view the appointment in shared calendars. Secret appointments are not considered for the conflict handling. Secret appointments are not displayed in the scheduling view.

Also see:

Displaying appointments in the calendar view (p. 141)

7.2.4 Displaying appointments in the list view

How to display an appointment in the list view:

1. Click on **View** in the tool bar. Select **List**.
2. Open a calendar in the folder view.
3. Click on an appointment in the list. The appointment's data is displayed in the detail view.

Additional functions:

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

Also see:

Navigating within the folder structure (p. 231)
Searching for Appointments (p. 166)
Displaying appointments in the calendar view (p. 141)
Displaying multiple timezones (p. 142)
Viewing or Saving Appointment Attachments (p. 145)
The Calendar list (p. 135)

7.3 Viewing or Saving Appointment Attachments

Depending on the view selected, the file names of appointment attachments are either displayed in the pop-up or in the display area below the subject. The following functions are available:

- display the attachment in the *Viewer*
- download the attachment
- save the attachment to *Drive*

Note: Depending on the attachment's file format, the available functions might differ.

How to use the appointment attachment functions:

1. Depending on the view selected, use one of the following methods:
   - Click on an appointment with an attachment in a calendar view. Click on an attachment's name in the pop-up.
   - Click on an appointment with an attachment in the list view. Click on an attachment's name in the detail view.
2. Click on the function wanted.

Tip: If an appointment contains several attachments, an action can be executed for all attachments at once. To do so, click on **All attachments**.

Also see:

Viewing Appointments (p. 140)
The Calendar list (p. 135)
The Calendar detail view (p. 136)
Day, Work week, Week, Month or Year calendar view. (p. 133)
The Calendar pop-up (p. 135)

7.4 Creating Appointments

The following options are available:

- Creating new appointments
- Using the date picker
- Using appointment reminders
- Setting recurring appointments
- Adding participants or resources to an appointment
- Setting an appointment's display
- Adding attachments
- Using the scheduling view
- Creating a follow-up appointment
- Creating appointments from iCal attachments
- Resolving appointment conflicts

Information on importing appointments can be found in Importing appointments (page 163).

7.4.1 Creating new appointments

How to create a new appointment:

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

Additional functions:

- To create an appointment, double-click in the calendar sheet 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, select the *Work week* or *Week* calendar view. Click on a day above the calendar sheet.

Additional instructions:

- Using the date picker (p. 148)
- Setting recurring appointments (p. 148)
- Setting an appointment's display (p. 149)
- Using appointment reminders (p. 149)
- Adding participants or resources to an appointment (p. 150)
- Adding attachments (p. 150)

Also see:

The appointment editing window: (p. 138)
Using the scheduling view (p. 151)
Creating a follow-up appointment (p. 152)
Creating appointments from iCal attachments (p. 152)
Resolving appointment conflicts (p. 153)

7.4.2 Using the date picker

The date picker allows selecting the date to be entered in a date field.

How to use the date picker in the editing window:

1. Click on the date field below **Starts on** or **Ends on**. The date picker opens.
2. Use one of the following methods:
   - To select a date within the current month, click on the wanted day.
     To select today's date, you can also click on **Today**.
   - To select a date from another month, the following options are available:
     - Navigate to the required month by using the **Browse** icons ‹ › .
       You can also click on the month name in the header. The year will be displayed. Click on the wanted month.
     - Click on the wanted day.
   - To select a date from another year, the following options are available:
     - Click on the month name in the header. The current year will be displayed.
     - Navigate to the required year by using the **Browse** icons ‹ › .
       You can also click on the year in the header. A time range of 12 months will be displayed. Click on the wanted year.
     - Click on the wanted month. Click on the wanted day.

   The date picker will be closed. The date is entered into the date field.

Also see:

Creating new appointments (p. 147)
The date picker (p. 134)
Creating new tasks (p. 182)

7.4.3 Setting recurring appointments

How to create a recurring appointment in the appointment editing window:

1. Enable **Repeat**. The current repetition parameters are displayed.
2. To set the repetition parameters, click on the value.
3. Set the repetition parameters:
   - In **Repeat**, you can set the interval between the appointments.
   - Below the interval, you can set the interval parameters.
   - In **Ends**, you can define when the recurring appointment ends.

Tip: Examples can be found in Questions and Answers.

Also see:

Creating new appointments (p. 147)
The appointment editing window: (p. 138)

7.4.4 Setting an appointment's display

The following options are available:

- display the appointment as free
- select an appointment colour
- define the visibility in shared calendars

How to set the appointment's display in the appointment editing window:

1. If there should be no conflict with overlapping appointments, enable *Show as free*.
2. In order to set an individual colour for the appointment, click on a colour field. If the **No colour** checkbox is enabled, the appointment is displayed in the colour of the calendar.
3. In a shared calendar, you can use the **Visibility** drop-down to define the calendar's visibility for other users who are not participants.
   - In the default setting **Standard**, the appointment is visible to all users who have permission to see the calendar.
   - If only the appointment date should be visible for other users but not the subject or other appointment data, select **Private** from the drop-down. Private appointments are marked with the *Private* icon .
   - If the appointment is to be invisible for other users, select **Secret** from the drop-down. Secret appointments are marked with the *Private* icon .
     Secret appointments do not conflict with other appointments. They are not displayed in the scheduling view.

Also see:

Creating new appointments (p. 147)
The appointment editing window: (p. 138)

7.4.5 Using appointment reminders

When creating or editing an appointment, you can set to be reminded of the appointment's due date. To do so, you can use one or several of the following notifications:

- an appointment reminder in the notification area
- an appointment reminder by E-Mail

How to set an appointment reminder in the appointment editing window:

1. Click on the current setting below **Reminder**. The *Edit reminders* window opens. It shows the current reminder.
2. To change the current reminder, select the reminder type. Select a time for the reminder. Define the benchmark for the time.
3. In order to add another reminder, click on **Add new Reminder**.
   In order to delete a reminder, click the **Delete** icon.
4. Click on **OK**.

Also see:

Creating new appointments (p. 147)
The appointment editing window: (p. 138)

7.4.6 Adding participants or resources to an appointment

How to add participants or resources in the appointment editing window:

1. Enter the E-Mail addresses of the participants, the name of a group, distribution list or resource in the input field below *Participants*. Tips:
   - While entering the E-Mail address, several matching suggestions are displayed. To accept a suggestion, use one of the following methods:
     - Use the scroll bar to browse the list. Click on a suggestion.
     - Use the cursor keys to select a suggestion. Press Enter.
   - To select contacts from an address book, click the **Address book** icon on the right side of the input field.
2. To remove participants or resources, click the icon next to the name.

All participants are notified about the new appointment in an E-Mail.

Tip: To find free appointments of all participants and resources you can use the schedule view.

Also see:

Creating new appointments (p. 147)
Selecting contacts from an address book (S. 69)
The appointment editing window: (p. 138)

7.4.7 Adding attachments

How to add attachments in the appointment editing window:

1. Click on **Add attachments** below *Attachments*.
2. Select one or several 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 appointments window.

Also see:

Creating new appointments (p. 147)
The appointment editing window: (p. 138)

7.4.8 Using the scheduling view

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

How to use the scheduling view for creating appointments:

1. You have the following possibilities for opening the scheduling view:
   - To use the scheduling view before creating a new appointment, click on **Scheduling** in the tool bar. The *Scheduling* page opens.
   - To use the scheduling view while creating a new appointment or editing an existing appointment, click on **Find a free time** in the appointment editing window. The *Scheduling* window opens.
2. Enter a participant's or resource's name in *Participants*. Tips:
   - While entering the E-Mail address, several matching suggestions are displayed. To accept a suggestion, use one of the following methods:
     - Use the scroll bar to browse the list. Click on a suggestion.
     - Use the cursor keys to select a suggestion. Press Enter.
   - To select contacts from an address book, click the **Address book** icon on the right side of the input field.

   The appointments of the participant or resource are displayed in the calendar sheet.

   You can save the participants as a distribution list. To do so, select **Save as distribution list** below the list.
3. Search for a free time in the calendar. Use the following methods:
   - To set a time range, click on the date on the upper left side. You can also use the browse icons
   - To set the display size of the calendar sheet, use the control elements on the upper right side.
   - To set the **Week** or **Month** date range, enable the respective entries in the **Options** drop-down.
   - Use the **Options** menu to adjust the view in the calendar sheet.
   - To adjust the visible part of the time range, use the scroll bar below the calendar sheet.
4. Define the appointment's start and end by using one of the following options:
   - In the calendar sheet drag open an area ranging from the beginning to the end of the new appointment.
     If pressing the [Alt] key before releasing the mouse button, the appointment's start and end date are entered on the appointment editing page.
   - To set the appointment's duration to one hour, click on the wanted time.

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

Also see:

Selecting contacts from an address book (S. 69)
Creating new appointments (p. 147)
Resolving appointment conflicts (p. 153)
The scheduling view (p. 137)
The date picker (p. 134)

7.4.9 Creating a follow-up appointment

You can create a follow-up appointment for an existing appointment. The follow-up appointment is prefilled with essential data from the existing appointment.

How to create a follow-up appointment:

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 **Follow-up**.
   - Double-click on an appointment in the list view. The appointment will be displayed in a window. Click on **Follow-up**.
2. Adjust the data for the new appointment. Click on **Create**.

Also see:

Creating new appointments (p. 147)
Using the scheduling view (p. 151)
Resolving appointment conflicts (p. 153)

7.4.10 Creating appointments from iCal attachments

You can create an appointment from an E-Mail's iCal attachment. An iCal attachment can be identified by the file extension .ics.

How to create an appointment from an E-Mail's iCal attachment:

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

Also see:

Creating new appointments (p. 147)
Resolving appointment conflicts (p. 153)

7.4.11 Resolving appointment conflicts

An appointment conflict happens if the following is true:

- You are the participant of an existing appointment. The appointment display is set as follows:
  - The visibility is set to **Standard** or **Private**.
  - The **Show as free** checkbox is disabled.
- You create a new appointment. You select the following appointment display:
  - The visibility is set to **Standard** or **Private**.
  - The **Show as free** checkbox is disabled.

As soon as you click on **Create**, the *Conflicts detected* page opens. The appointments causing the conflict are displayed.

How to resolve appointment conflicts:

1. To show or hide details, you can click on an appointment on the *Conflicts detected* page.
2. 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 enable **Show as free**.

Also see:

Creating new appointments (p. 147)
Using the scheduling view (p. 151)
Creating a follow-up appointment (p. 152)

7.5 Answering appointment invitations

If a user or an external partner adds you to the appointment recipients, you will receive at least one of the following notifications:

- You are informed about this appointment in the *Notification area*.
- You will receive an E-Mail invitation for the appointment.

You can accept, temporarily accept or refuse your participation in the appointment. You can always change your appointment confirmation status later.

How to answer an appointment invitation in the notification area:

1. Click the **Notifications** icon in the menu bar. The *Notification area* is displayed.
2. To display the suggested appointment in the calendar, click on **Open in calendar**.
   To answer the appointment invitation, click on **Accept/Decline** below the invitation.
3. Enter a comment in the *Change confirmation status* window. Click on one of the buttons **Decline**, **Tentative** or **Accept**.

Tip: You can accept the appointment directly within the notification area by clicking on the **Accept invitation** button.

How to answer an appointment invitation in an e-mail invitation:

1. Open an E-Mail with an appointment invitation in the *E-Mail* application.
2. Enter a comment below *This e-mail contains an appointment* in the detail view. Click on one of the buttons **Accept**, **Tentative** or **Decline**.

Note: In the calendar settings you can define whether the invitation e-mail is automatically deleted when accepting or declining an appointment.

Also see:

The notification area (p. 33)
Changing the appointment confirmation or status (p. 161)

7.6 Adding Calendars

The following options are available:

- Adding personal calendars
- Subscribing to public calendars
- Subscribing to Google calendars
- Subscribing to iCal calendars
- Importing calendars from files

Also see:

Folders (p. 228)
Managing Appointments (p. 159)

7.6.1 Adding personal calendars

You can create additional personal calendars below *My calendar*.

How to create a new personal calendar:

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

Also see:

Subscribing to public calendars (p. 156)
Subscribing to Google calendars (p. 157)
Subscribing to iCal calendars (p. 157)
Importing calendars from files (p. 158)

7.6.2 Subscribing to public calendars

You can subscribe to calendars that are publicly available on the Internet. Those are e.g., calendars with international public holidays, sports events, media events or stock exchanges. Changes that you apply to the external calendar can be transferred to the groupware by refreshing the subscribed calendar.

Note: Depending on the configuration, this function might not be available.

How to subscribe to public calendars:

1. In the folder view, click on **Add new calendar**. A menu opens.
   Click on **Browse calendars of interest** in the menu. The *Add calendar* window opens.
2. Select the language and country of the calendar that you want to subscribe to.
   Select one or several calendars.
3. Click on **Save**.
   The appointments will be imported to a new calendar.
4. In order to refresh the subscribed data, click the **Action** icon next to the calendar. Click on **Refresh this calendar** in the menu.

Also see:

Adding personal calendars (p. 156)
Subscribing to Google calendars (p. 157)
Subscribing to iCal calendars (p. 157)
Importing calendars from files (p. 158)
Managing subscribed folders (p. 251)

7.6.3 Subscribing to Google calendars

You can subscribe to your external Google calendar. The following applies:

- Changes that you apply to the subscribed calendar in the groupware are not transferred to the external Google calendar.
- Changes that you apply to the external Google calendar can be transferred to the groupware by refreshing the subscribed calendar.

How to subscribe to your Google calendar:

1. In the folder view, click on **Add new calendar**. A menu opens.
2. Click the **Google calendar** menu item. A new browser window opens. Grant access to your Google calendar.

   The appointments will be imported to a new calendar. As soon as the import has been completed, the *Subscribe calendar* window will be closed.
3. In order to refresh the subscribed data, click the **Action** icon next to the calendar. Click on **Refresh this calendar** in the menu.

Also see:

Adding personal calendars (p. 156)
Subscribing to public calendars (p. 156)
Subscribing to iCal calendars (p. 157)
Importing calendars from files (p. 158)
Managing subscribed folders (p. 251)

7.6.4 Subscribing to iCal calendars

You can subscribe to iCal calendars that are publicly available on the Internet. To do so, you need to know the calendar's url. Changes that you apply to the external calendar can be transferred to the groupware by refreshing the subscribed calendar.

How to subscribe to iCal calendars:

1. In the folder view, click on **Add new calendar**. A menu opens.
2. Click on **Subscribe via URL (iCal)** in the menu. The *Subscribe to iCal feed* window opens.

   Enter an iCal URL. Click on **Subscribe**.
3. In order to refresh the subscribed data, click the **Action** icon next to the calendar. Click on **Refresh this calendar** in the menu.

Also see:

Adding personal calendars (p. 156)
Subscribing to public calendars (p. 156)
Subscribing to Google calendars (p. 157)
Importing calendars from files (p. 158)

7.6.5 Importing calendars from files

You can import calendars that have been created from within other applications. The calendar you want to import needs to be available as an iCal file.

How to import calendars from a file:

1. In the folder view, click on **Add new calendar**. A menu opens.
2. Select **Upload file** from the menu. The *Import from file* window opens.
   Select a file. Click on **Import**.

Also see:

Adding personal calendars (p. 156)
Subscribing to public calendars (p. 156)
Subscribing to Google calendars (p. 157)
Subscribing to iCal calendars (p. 157)

7.7 Managing Appointments

Some of the techniques for organising appointments require having all ready set up your own calendars. Information on creating calendars can be found in Adding Calendars (page 155).

The following options are available:

- Editing appointments
- Changing the appointment confirmation or status
- Managing favourite timezones
- Using calendar colours
- Moving appointments to another calendar
- Importing appointments
- Exporting appointments
- Printing appointments
- Deleting appointments

7.7.1 Editing appointments

The following options are available:

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

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

Note: Depending on the configuration, you can only edit an appointment in your private calendars if you are the appointment's organiser.

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

1. Depending on the view selected, use one of the following methods:
   - Click on an appointment in a calendar view. Click on **Edit** in the pop-up.
   - Select an appointment in the list view. Click on **Edit** in the tool bar.

   When having selected a serial appointment, you are asked to which appointments of the series the changes should be applied:
   - When having selected the first appointment of the series, you can either only change the first appointment or the complete series.
   - When having selected an appointment within the series, you can either only change the selected appointment or the selected appointment and all future appointments of the series.
   - When having selected the last appointment of the series, you can only change the last appointment. In the latter case, you are not asked which appointments the changes should be applied to.

   The appointment's data is displayed.
2. Edit the data.
3. Click on **Save**.

How to move an appointment to another day:

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

How to change an appointment's time or duration:

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

Also see:

The appointment editing window: (p. 138)
The date picker (p. 134)

7.7.2 Changing the appointment confirmation or status

You can change your appointment status at a later point of time. The following options are available:

- You can accept or decline the appointment without comment.
- You can change the confirmation status. You can add a comment that is visible to other participants.

Note: Depending on the configuration, you can only edit an appointment confirmation in your private calendars if you are a participant of the appointment. In recurring appointments you can change the confirmation for a single occurrence or for the complete series.

How to accept or decline an appointment:

1. Depending on the view selected, use one of the following methods:
   - Click on an appointment in a calendar view. In the pop-up, either click on **Accept** or on **Decline**.
   - Double-click on an appointment in the list view. The appointment will be displayed in a window. Click on **Accept** or on **Decline**.
2. When having selected a recurring appointment, set whether the changes should be applied to the single occurrence to for the complete series.

How to change your confirmation status:

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 **Change status**.
   - Select an appointment in the list view. Click on **Status** in the tool bar.
2. When having selected a recurring appointment, set whether the changes should be applied to the single occurrence to for the complete series.
3. Enter a comment in the *Change confirmation status* window. Click on one of the buttons **Decline**, **Tentative** or **Accept**.

7.7.3 Managing favourite timezones

Timezones marked as favourites by you, can be displayed in the calendar sheet in addition to the preset timezone.

How to mark a timezone as favourite:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select **Calendar** from the side bar. Click on **Favourite timezones**.
3. Click on **Add timezone** in the display area. The *Select favourite timezone* window opens.
4. Select a timezone from the list. Click on **Add**.

To remove a timezone from the list of favorites, click the **Delete** icon next to the timezone.

Also see:

The appointment editing window: (p. 138)
Displaying multiple timezones (p. 142)

7.7.4 Using calendar colours

You can assign a colour to a calendar. All appointments in this calendar will then be displayed in the colour of the calendar. If you assign an individual colour to an appointment when creating or editing it, the appointment will be displayed in the colour assigned, not in the colour of the calendar.

How to select a calendar colour:

1. Click the **Actions** icon next to the calendar name in the folder view.
2. Select a colour from the colour selection drop down.

Also see:

How are appointments displayed in a calendar view? (p. 143)

7.7.5 Moving appointments to another calendar

You can move appointments to another calendar.

Prerequisite: You need to have the appropriate permissions to create objects in the target calendar.

How to move appointments to another calendar:

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 the **More actions** icon . Select **Move** from the menu.
   - Select an appointment or multiple appointments in the list view. Click the **More actions** icon in the tool bar. Select **Move** from the menu.
2. Select a calendar in the *Move* window. You can create a new calendar by clicking on **Create folder**.
3. Click on **Move**.

7.7.6 Importing appointments

You can import appointments from files in iCal format.

How to import appointments from an iCal file:

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

Result: The contacts are added to the calendar.

Also see:

Exporting appointments (p. 163)

7.7.7 Exporting appointments

You can export appointments in the iCalendar format. You can e.g. use this format to exchange appointments with other calendar applications. You can export individual appointments or all appointments from a calendar.

How to export individual appointments:

1. Depending on the view, you have the following options:
   - Click on an appointment in a calendar view.
     In the pop-up, click the **More actions** icon. Click the **Export** menu item.
     The *Export selected* window opens.
   - Select an appointment or multiple appointments in the list view.
     Click the **More actions** icon in the tool bar. Click the **Export** menu item.
     The *Export selected* window opens.
2. Click on **Export**. Complete the entries.

How to export all appointments from a calendar:

1. Select a personal or public address book in the folder view.
2. Click the **Actions** icon next to the folder name. Click on **Export**. The *Export folder* window opens.
3. Click on **Export**. Complete the entries.

Also see:

Importing appointments (p. 163)

7.7.8 Printing appointments

To print calendars and appointments you can:

- print a calendar sheet with appointments
- print appointment data
- print a detailed or compact list of appointments

How to print a calendar sheet with appointments:

1. Click on **View** in the tool bar. Select one of the following entries: **Day**, **Work week**, **Week** or **Month**.
2. Open a calendar in the folder view.
3. Click on **View** in the tool bar. Click on **Print** in the menu. A window with a print preview opens.
4. If required, change the printer settings. Click on the **Print** button.
5. Close the print preview window.

How to print an appointment's data:

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 the **More actions** icon ☰. Click on **Print** in the menu.
   - Select an appointment or multiple appointments in the list view. Click the **More actions** icon ☰ in the tool bar. Click on **Print** in the menu.

   A window with a print preview opens.
2. If required, change the printer settings. Click on the **Print** button.
3. Close the print preview window.

How to print a list of appointments:

1. Click on **View** in the tool bar. Select **List**.
2. Select the appointments to be printed.
3. Click the **More actions** icon ☰ in the tool bar. Click on **Print** in the menu. A window opens. You are asked how you want to print the appointments.
   - To print a list with detailed appointment data, click on **Detailed**.
   - To print a compact list, click on **Compact**.
4. If required, change the printer settings. Click on the **Print** button.
5. Close the print preview window.

7.7.9 Deleting appointments

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

How to delete appointments:

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 or multiple appointments in the list view. Click on **Delete** in the tool bar.
2. Confirm that you want to delete the appointment.

Result: The appointment will be deleted.

Additional functions:

- When having selected a serial appointment, you are asked which appointments of the series are to be deleted:
  - When having selected the first appointment of the series, you can either only delete the first appointment or the complete series.
  - When having selected an appointment within the series, you can either only delete the selected appointment or the selected appointment and all future appointments of the series.
  - When having selected the last appointment of the series, you can only delete the last appointment. In the latter case, you are not asked which appointments are to be deleted.
- If you are the appointment's organiser, you can inform other participants about the reason for the deletion by entering a message. The input field is shown if the following conditions are met:
  - The appointment has at least two participants.
  - **Receive notification for appointment changes** is enabled In the calendar settings.

  The message is sent as E-Mail.

7.8 Searching for Appointments

In order to search for specific appointments, you can use the following search criteria:

- search terms for subject, description, location, attachments' names, participants
- calendars that are to be searched
- appointment confirmation status
- time frame of the appointment creation, related to the current date: one month, three months, one year
- type: all, series, single appointment

How to search for appointments:

1. Click on the **Search** input field. Additional icons are displayed.
2. Enter a search term in the input field. The search menu opens.

   Define the data sources to be searched by clicking on an entry in the search menu.

   - If clicking on the search term or pressing enter, the following data sources are searched: subject, description
   - In order to only search in the subject, click on **in subject** in the search menu.
     Accordingly, you can limit the search to the description, location or the attachment's name.
   - In order to search for appointments with a specific participant, click on a name in the search menu.

   The search results are displayed in the list that is shown in the display area.

3. To select a calendar for the search, click the **Options** icon in the input field. The calendar that is searched, is displayed in the **Folder** drop-down. To select another calendar, open the drop-down.

   If you select **All folders**, all private, public, and shared calendars are searched.

4. The following options are available for limiting the search to specific appointments:
   - To limit the search to appointments with a specific confirmation status, click the **Options** icon in the input field. Open the **My status** drop-down. Select a status.
   - To limit the search to a specific time range, click the **Options** icon in the input field. Open the **Range** drop-down. Select a time range.
   - To limit the search to single or recurring appointments, click the **Options** icon in the input field. Open the **Type** drop-down. Select a type.

5. To refine the search result, enter further search terms: To remove a search term, click the **Remove** icon ✖ next to the search term.
6. In order to finish the search, click the **Close** icon in the input field.

7.9 Appointments in teams

The following options are available:

- Sharing appointments
- Sending an E-mail to participants
- Inviting participants to a new appointment
- Creating a distribution list from the list of participants

7.9.1 Sharing appointments

You can share your appointments with internal as well as external partners. Depending on the requirements, different methods exist.

- To make a calendar available for internal users or external partners, proceed as follows:
  - Create a new personal or public calendar.
  - Share this calendar.

  You can also share an existing calendar.
- If another internal user shared a calendar with you, you can access this calendar in the folder view.
- In case you want to invite external partners to an appointment, enter their E-Mail addresses in the input field below *Participants*.
  The external partners receive an E-Mail with an appointment invitation.

Also see:

Sending an E-mail to participants (p. 167)
Inviting participants to a new appointment (p. 168)
Creating a distribution list from the list of participants (p. 168)

7.9.2 Sending an E-mail to participants

You can send an e-mail to all appointment participants.

How to send an Email to all appointment participants:

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

Also see:

Sharing appointments (p. 167)
Inviting participants to a new appointment (p. 168)
Creating a distribution list from the list of participants (p. 168)

7.9.3 Inviting participants to a new appointment

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

How to invite participants to a new appointment:

1. Depending on the view selected, use one of the following methods:
   - In a calendar view, click on an appointment with multiple participants. In the pop-up, click the **More actions** icon ≡. Click on **Invite to new appointment** in the menu.
   - In the list view, double-click on an appointment with multiple participants. The appointment will be displayed in a window. Click the **More actions** icon ≡. Click on **Invite to new appointment** in the menu.
2. Complete the data for creating an appointment.

Also see:

Sharing appointments (p. 167)
Sending an E-mail to participants (p. 167)
Creating a distribution list from the list of participants (p. 168)

7.9.4 Creating a distribution list from the list of participants

You can create a distribution list from an appointment's list of participants.

You can create a distribution list from an appointment's list of participants.

1. Depending on the view selected, use one of the following methods:
   - In a calendar view, click on an appointment with multiple participants. In the pop-up, click the **More actions** icon ≡. Select **Save as distribution list** from the menu.
   - In the list view, double-click on an appointment with multiple participants. The appointment will be displayed in a window. Click the **More actions** icon ≡. Select **Save as distribution list** from the menu.
2. Complete the details for creating the distribution list.

Also see:

Sharing appointments (p. 167)
Sending an E-mail to participants (p. 167)
Inviting participants to a new appointment (p. 168)

7.10 Managing Groups

In case you frequently want to add the same persons to appointments or tasks, you can create a group consisting of those persons. You can then add the group as participant instead of adding single persons. The following options are available:

- create a new group
- edit an existing group
- delete an existing group

Note: Depending on the configuration, those functions are not available for all users.

How to create a new group:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
   In the side bar, click on **Groups**.
2. In the display area, click on **Create new group**.
3. Enter a group name in the *Create new group* window. Add members. The members are displayed below *Members*
   In order to remove a member, click the **Remove member** icon ✖ next to the name.
   Click on **Create**.

How to edit a group:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
   In the side bar, click on **Groups**.
2. Select a group in the display area. Click on **Edit**.
3. Edit the group's data in the *Edit group* window.
   Click on **Save**.

How to delete a group:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
   In the side bar, click on **Groups**.
2. Select a group in the display area.
3. Click the **Delete** button.

Also see:

Managing Resources (p. 170)

7.11 Managing Resources

Other than participant conflicts, resource conflicts cannot be ignored when creating appointments. If creating appointments, resources that are already booked for other appointments can not be added. The following options are available:

- create new resources
- edit existing resources
- delete existing resources

Note: Depending on the configuration, those functions are not available for all users.

How to create a new resource:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
   In the side bar, click on **Resources**.
2. In the display area, click on **Create new resource**.
3. Enter a resource name in the *Create new resource* window. You can enter a description.
   Define an E-Mail address for the resource.
   Click on **Create**.

How to edit a resource:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
   In the side bar, click on **Resources**.
2. Select a resource in the display area. Click on **Edit**.
3. Edit the resource's data in the *Edit resource* window.
   Click on **Save**.

How to delete a resource:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
   In the side bar, click on **Resources**.
2. Select a resource in the display area.
3. Click the **Delete** button.

Also see:

Managing Groups (p. 169)

7.12 Calendar Settings

How to use the calendar settings:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Calendar** in the side bar.

The following settings are available:

View

- **Start of working time**
  Defines the start of working hours.
- **End of working time**
  Defines the end of working hours.
- **Time scale in minutes**
  Specifies the interval for dividing the time grid in the *Day*, *Work week*, *Week* calendar views.
- **Display refused appointments**
  Defines whether appointments that you refused are displayed.

Birthday calendar

- **Show birthday calendar**
  Defines whether a birthday calendar is displayed in the folder view.

Workweek view

- **Week start**
  Defines the beginning of a work week.
- **Workweek length**
  Defines the number of days of a work week.

New appointment

- **Default reminder**
  Defines the pre-set time interval for the appointment reminder. To change the setting, click on the current setting. Change the current reminder in the *Edit reminders* window. You can add additional reminders.
- **Default reminder for all-day appointments**
  Defines the default time for the reminder for all day appointments. To change the setting, click on the current setting. Change the current reminder in the *Edit reminders* window. You can add additional reminders.
- **Default reminder for appointments in birthday calendar**
  Defines the reminder's default time for appointments in the birthday calendar. To change the setting, click on the current setting. Change the current reminder in the *Edit reminders* window. You can add additional reminders.
- **Mark all day appointments as free**
  Defines whether all day appointments are displayed as free by default.

E-mail notifications

- **Receive notification for appointment changes**
  Specifies whether you will receive an email notification, if the following is true: An appointment in which you participate has been re-created, changed or deleted.
- **Receive notification as appointment creator when participants accept or decline**
  Specifies whether you will receive an email notification, if the following is true: a participant accepted or declined an appointment created by you.
- **Receive notification as appointment participant when other participants accept or decline**
  Specifies whether you will receive an email notification, if the following is true: a participant accepted or declined an appointment in which you participate.

- **Automatically delete the invitation e-mail after the appointment has been accepted or declined**
  Defines whether the email notification for an appointment invitation will be automatically deleted when accepting or declining the appointment.

8 Tasks

Learn how to work with the *Tasks* application.

- the *Tasks* components
- view tasks
- view or save task attachments
- create tasks
- answer task invitation
- add task folders
- organise tasks
- search for tasks
- share tasks with other users
- use the *Tasks* settings

How to launch the *Tasks* app:

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

8.1 The *Tasks* Components

The *Tasks* app includes the following components.

- The Tasks search bar
- The Tasks tool bar
- The Tasks folder view
- The Tasks display area
  - The Tasks list
  - The Tasks detail view
- The task editing window

8.1.1 The Tasks search bar

Enables you to search for tasks.

The search bar is displayed if the folder view is visible. In order to display the folder view, click on **View** in the tool bar. Enable **Folder view**.

Also see:

General description of the search bar (p. 28)
Searching for Tasks (p. 191)
Viewing tasks (p. 180)

8.1.2 The Tasks tool bar

Contains functions for creating, editing and organising tasks. Note: Some functions are only available if you opened a folder for which you have the appropriate permissions to create or edit objects.

Content

- **New**. Creates a new task.
- **Edit**. Edits a task's data.
- **Due**. Changes a task's due date.
- **Done**. Marks a task as done.
- **Delete**. Deletes the tasks selected by you.
- **More actions** icon ☰. Opens a menu with additional functions.
- **View**. Opens a menu with check boxes for controlling the view.
  - **Folder view**. Opens or closes the folder view.
  - **Checkboxes**. Displays checkboxes in the list, for marking objects.

Also see:

General description of the tool bar (p. 29)
Creating Tasks (p. 182)
Managing Tasks (p. 186)

8.1.3 The Tasks folder view

Displays the tasks folders.

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

Content

- *My tasks*. Contains your personal tasks.
- *Public tasks*. Contains tasks shared with all users.
- *Shared tasks*. Contains tasks shared with you by other users.

Depending on the configuration, the content can differ from this information.

Functions

- If clicking on a folder, its tasks are displayed.
- The **Actions** icon next to the selected folder offers functions for organising data and for exchanging data.
- The **Add new folder** button allows creating a new private or public folder.

Also see:

General description of the folder view (p. 30)
Folders (p. 228)
Adding Task Folders (p. 185)

8.1.4 The Tasks display area

Contains the contacts list and a contact's detail view.

Also see:

General description of the display area (p. 31)

8.1.5 The Tasks list

Displays a list of tasks in the folder selected.

Content

- The following details are displayed for each task: subject, status or due date, and the progress.
- The text above the list contains the name of the selected folder. The number corresponds to the number of objects in the selected folder.

Functions

- If clicking on a task, its content is displayed in the detail view.
- To select multiple tasks, enable the **Checkboxes** option in the **View** drop-down in the tool bar.
  You can also use your system's multi-selection functions.
  In order to select all contacts in folder, enable the **Select all** checkbox above the list.
- If clicking the **Sort** icon ↓↑ above the list, a menu opens that allows sorting tasks. You can also define in this menu whether tasks marked done are displayed.
- To adjust the list width, hover over the line between the list and the detail view. Drag the border to the left or to the right.

Also see:

Searching for Tasks (p. 191)

8.1.6 The Tasks detail view

Shows the data of the task that you selected in the list. If double-clicking on the task in the list, the data are displayed in a window.

Content

- Icon for the task's priority, if set.
  Subject
  Private tasks are marked with the **Private** icon .
- Task's start date, if available
- Status and progress
- If the task has attachments, the names of the attachments are displayed.
- Task's description, if available
- If the task is a recurring task, recurrence parameters will be displayed.
- Task's start date, if available
- Task details like billing information, if available
- If the task has several participants, the number of participants that accepted, declined or have not replied yet are shown on the top right side above the list of participants. In order to filter the list of participants, click the icons.
- Names of the participants, if they exist. If clicking on a name, a *pop-up* opens. It displays information about the contact.
  - The person's contact data.
  - If you exchanged E-Mail messages with this person, they are displayed below *Recent conversations*.
  - If you have appointments scheduled with this person, they are displayed below *Shared appointments*.
  - Information about this person from social networks. You can use the available buttons to open this person's profile.

  If clicking on an appointment or an E-Mail, an additional pop-up opens.
- If the appointment includes external participants, their names are displayed below *External participants*.

Also see:

Viewing or Saving Task Attachments (p. 181)
Managing Tasks (p. 186)

8.1.7 The task editing window

This window is used when creating a new task or editing an existing one.

In order to open the window, do one of the following:

- Click on **New** in the tool bar.
- Select a task. Click on **Edit** in the tool bar.

This window is used when creating a new task or editing a task.

Content

- The title bar includes the following elements:
  - window title
  - icons for adjusting the window position, cancel icons
- Task data.
  - **Subject** input field. Enter the subject in this field. The subject is displayed as the task title.
  - **Description** input field. You can enter a description for the task in this field.
  - **Expand form**. Displays additional input fields.
  - **Start date** and **Due date**. Defines the start and the due date. Clicking on it opens the date picker. If **All day** is disabled, you can set start and due times.
  - **All day**. Defines whether the task is supposed to last whole days.
  - **Repeat**. Defines whether the task is to be repeated. Examples can be found in the questions about appointments and tasks.
- **Reminder**. Defines when and how you will be reminded about the task's due date. You can also set a date and time for the reminder in **Reminder date**. In this case, **Manual input** will be pre-selected in the **Reminder** field.
- Task view
  - **Status**. Defines the task's status. You can also enter a percentage value for the task completion in **Progress**.
  - **Priority**. Defines the task's priority.
  - **Private**. Enable this checkbox if other users are not to see the task's subject and description.
- **Add contact** input field. Enter the names of the participants that are to take part in the task in this field.
  Select contacts icon. Opens a window for selecting contacts from a list.
- **Add attachments**. Adds files.
- **Show details**. Displays additional data fields where you can enter billing details like estimated efforts, actual efforts or billing information.
- button bar
  - **Create**. Saves the current data of the task. Closes the Format window.
  - **Cancel**. Cancels creating or editing the task.

Also see:

General description of the editing window (p. 34)

The date picker (p. 134)
Creating Tasks (p. 182)
Editing tasks (p. 187)

8.2 Viewing tasks

How to display a task:

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

Additional functions:

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

Also see:

Navigating within the folder structure (p. 231)
Searching for Tasks (p. 191)
Viewing or Saving Task Attachments (p. 181)
The Tasks detail view (p. 178)
The Tasks list (p. 177)

8.3 Viewing or Saving Task Attachments

The file names of task attachments are displayed in the display area below the subject. The following functions are available:

- display the attachment in the *Viewer*
- download the attachment
- save the attachment to *Drive*

Note: Depending on the attachment's file format, the available function might differ.

How to use the task attachment functions:

1. Select a task with an attachment.
2. Click on an attachment's name in the detail view. Click on the function wanted.

Tip: If a task contains several attachments, an action can be executed for all attachments at once. To do so, click on **All attachments**.

Also see:

Viewing tasks (p. 180)
The Tasks detail view (p. 178)
The Tasks list (p. 177)

8.4 Creating Tasks

The following options are available:

- Creating new tasks
- Creating recurring tasks
- Adding participants to a task
- Adding attachments

Information on importing tasks can be found in Importing tasks (page 189).

8.4.1 Creating new tasks

How to create a new task:

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

Additional functions:

- To view the complete form, click on **Expand form**. The following optional functions are available:
  - Set the task's start and due date.
  - To get an appointment reminder, select a setting in **Reminder**. The respective date and time are entered in **Reminder date**.
    To use custom values, set them in **Reminder date**. In this case, **Manual input** will be pre-selected in the **Reminder** field.
  - If the subject and description are not to be shown to other users, activate **Private**. Private tasks are marked with the *Private* icon .
  - In order to add details like billing information, click on **Show details**. Enter the data required.

Additional instructions:

- Using the date picker (p. 148)
- Creating recurring tasks (p. 183)
- Adding participants to a task (p. 183)
- Adding attachments (p. 183)

Also see:

The task editing window (p. 179)

8.4.2 Creating recurring tasks

How to create a recurring task in the task editing window:

1. To view the complete form, click on **Expand form**.
2. Enable **Repeat**. The current repetition parameters are displayed.
3. To set the repetition parameters, click on the value.
4. Set the repetition parameters:
   - In **Repeat**, you can set the interval between the appointments.
   - Below the interval, you can set the interval parameters.
   - In **Ends**, you can define when the recurring tasks ends.

Tip: Examples can be found in Questions and Answers.

Also see:

Creating new tasks (p. 182)
The task editing window (p. 179)

8.4.3 Adding participants to a task

How to add participants in the task editing window:

1. Enter the participants' E-Mail addresses, a group's name or a distribution list's name in the input field below *Participants*. Tips:
   - While entering the E-Mail address, several matching suggestions are displayed. To accept a suggestion, use one of the following methods:
     - Use the scroll bar to browse the list. Click on a suggestion.
     - Use the cursor keys to select a suggestion. Press Enter.
   - To select contacts from an address book, click the **Address book** icon on the right side of the input field.
2. In order to remove a participant, click the icon next to the name.

Also see:

Creating new tasks (p. 182)
Selecting contacts from an address book (S. 69)
The task editing window (p. 179)

8.4.4 Adding attachments

How to add attachments in the task editing window:

1. Click on **Add attachments** below *Attachments*.
2. Select one or several 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 task window.

Also see:

Creating new tasks (p. 182)
The task editing window (p. 179)

8.5 Answering Task Invitations

If a user or an external partner adds you to a task as a participant, you will receive at least one of the following notifications:

- You are informed about this task in the *Notification area*.
- You will receive an E-Mail invitation for the task.

You can accept, temporarily accept or refuse your participation in the task.

How to answer a task invitation in the notification area:

1. Click the **Notifications** icon in the menu bar. The *Notification area* is displayed.
2. Click on **Accept/Decline** below the invitation.
3. Enter a comment in the *Change confirmation status* window. Click on one of the buttons **Accept**, **Tentative** or **Decline**.

Tip: You can confirm the task directly in the notification area by clicking on the **Accept invitation** button.

How to answer a task invitation in an email invitation:

1. Display an E-Mail with a task invitation in the *E-Mail* application.
2. Click on one of the buttons **Confirm**, **Temporary**, **Decline** in the detail view below *This e-mail contains a task*.

Also see:

The notification area (p. 33)

8.6 Adding Task Folders

You can create additional personal task folders below *My tasks*.

How to create a new personal task folder:

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

8.7 Managing Tasks

Some of the techniques for organising tasks require having set up your own tasks folders. Information on creating folders can be found in Adding Task Folders (page 185).

The following options are available:

- Editing tasks
- Marking tasks as done
- Changing a task's due date
- Moving tasks to another folder
- Changing tasks confirmations
- Importing tasks
- Exporting tasks
- Printing tasks
- Deleting tasks

8.7.1 Editing tasks

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

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

How to edit a task:

1. Select a task from the list.
2. Click on **Edit** in the tool bar. The task's data are displayed.
3. Edit the data.
   A description of the input fields can be found in The task editing window (page 179).
4. Click on **Save**.

Also see:

Marking tasks as done (p. 187)
Changing a task's due date (p. 188)
Changing tasks confirmations (p. 189)
The task editing window (p. 179)

8.7.2 Marking tasks as done

You can mark tasks as done.

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

How to mark a task as done:

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

Also see:

Editing tasks (p. 187)
Changing a task's due date (p. 188)
Changing tasks confirmations (p. 189)
The task editing window (p. 179)

8.7.3 Changing a task's due date

You can change a task's due date.

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

How to change a task's due date:

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

Also see:

Editing tasks (p. 187)
Marking tasks as done (p. 187)
Changing tasks confirmations (p. 189)
The task editing window (p. 179)

8.7.4 Moving tasks to another folder

You can move tasks to another folder.

Prerequisite: You need to have the appropriate permissions to create objects in the target folder.

How to move tasks to another folder:

1. Select a task or multiple tasks from the list.
2. Click the **More actions** icon ☰ in the tool bar. Select **Move** from the menu.
3. Select a folder in the *Move* window. You can create a new folder by clicking on **Create folder**.
4. Click on **Move**.

Tip: In order to move tasks using drag and drop, select a task or multiple tasks in the list. Drag the selected tasks to a folder in the folder view.

8.7.5 Changing tasks confirmations

You can change your task confirmation at a later point in time.

How to change your task confirmation:

1. Select a task from the list.
2. Click the **More actions** icon in the tool bar. Click on **Change confirmation status** in the menu.
3. A window opens. Select a confirmation status. If required, enter a message.
4. Click on **Change status**.

8.7.6 Importing tasks

You can import tasks from files in iCal format.

How to import tasks from an iCal file:

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

Result: The tasks are added to the folder.

Also see:

Exporting tasks (p. 189)

8.7.7 Exporting tasks

You can export tasks in the iCalendar format. You can e.g. use this format to exchange tasks with other calendar applications. You can export individual tasks or all tasks from a folder.

How to export individual tasks:

1. Select a task or multiple tasks from the list.
2. Click the **More actions** icon in the tool bar. Click the **Export** menu item. The *Export selected* window opens.
3. Click on **Export**. Complete the entries.

How to export all tasks from a folder:

1. Select a personal or public tasks folder in the folder view.
2. Click the **Actions** icon next to the folder name. Click on **Export**. The *Export folder* window opens.
3. Click on **Export**. Complete the entries.

Also see:

Importing tasks (p. 189)

8.7.8 Printing tasks

You can print the data of a single task or of multiple tasks.

How to print a task's data:

1. Select a task or multiple tasks from the list.
2. Click the **More actions** icon ☰ in the tool bar. Click on **Print** in the menu. A window with a print preview opens.
3. If required, change the printer settings. Click on the **Print** button.
4. Close the print preview window.

8.7.9 Deleting tasks

You can delete tasks.

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

How to delete tasks:

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

Result: The task will be deleted.

8.8 Searching for Tasks

In order to search for tasks, you can use the following search criteria:

- search terms for subject, description, attachments' names, participants
- folders that are to be searched
- the task's status
- task type: single or recurring task
- folder type: all, private, public, shared

How to search for tasks:

1. Click on the **Search** input field. Additional icons are displayed.
2. Enter a search term in the input field. The search menu opens.

   Define the data sources to be searched by clicking on an entry in the search menu.

   - If clicking on the search term or pressing enter, the following data sources are searched: subject, description
   - In order to only search in the subject, click on **in subject** in the search menu.
     Accordingly, you can limit the search to the description or the attachment's name.
   - In order to search for appointments with a specific participant, click on a name in the search menu.

   The search results are displayed in the list that is shown in the display area.

3. To select a folder for the search, click the **Options** icon in the input field. The folder that is searched, is displayed in the **Folder** drop-down. To select another folder, open the drop-down.

   If you select **All folders**, all private, public, and shared folders are searched.

4. The following options are available for limiting the search to specific tasks:
   - To limit the search to tasks with a specific editing status, click the **Options** icon in the input field. Open the **Task status** drop-down. Select a status.
   - To limit the search to single or recurring tasks, click the **Options** icon in the input field. Open the **Task type** drop-down. Select a type.
   - To limit the search to private, public or shared tasks, click the **Options** icon in the input field. Open the **Folder type** drop-down. Select a type.

5. To refine the search result, enter further search terms: To remove a search term, click the **Remove** icon next to the search term.
6. In order to finish the search, click the **Close** icon in the input field.

8.9 Tasks in teams

The following options are available:

- Sharing tasks with other users
- Delegating tasks to other users

8.9.1 Sharing tasks

You can share your tasks with internal as well as external partners. Depending on the requirements, different methods exist.

- To make a folder available for internal users or external partners, proceed as follows:
  - Create a new personal or public tasks folder.
  - Share this folder.

  You can also share an existing folder.
- If another internal user shared a task folder with you, you can access this folder in the folder view.
- To invite external partners to a task, proceed as follows:

  When creating the task, add external partners as *external participants*.

Also see:

Delegating tasks (p. 192)

8.9.2 Delegating tasks

You can delegate a task to an internal user when newly creating the task. To do so enter the name of the internal user as participant.

Also see:

Sharing tasks (p. 192)

8.10 Task Settings

How to use the task settings:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Tasks** in the side bar.

The following settings are available:

Email notifications

- **Receive notifications when a task in which you participate is created, modified or deleted**
  Specifies whether you will receive an E-Mail notification, if the following is true: A task in which you participate has been re-created, changed or deleted.
- **Receive notifications when a participant accepted or declined a task created by you**
  Specifies whether you will receive an E-Mail notification, if the following is true: A participant accepted or declined a task created by you.
- **Receive notifications when a participant accepted or declined a task in which you participate**
  Specifies whether you will receive an E-Mail notification, if the following is true: A participant accepted or declined a task in which you participate.

9 Drive

Learn how to work with the *Drive* application.

- the *Drive* components
- view files
- download files or folder contents
- create files or *Drive* folders
- create or edit text files
- organise files or *Drive* folders
- search for files
- share files and *Drive* folders with other users or external partners.
- access data with WebDAV
- access your cloud storage that you set up in third party products like Dropbox
- work in teams with other users or external partners
- use the *Drive* settings

Information on the usage of local apps on desktops and mobile devices can be found in the Drive apps user guide.

How to launch the *Drive* app:

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

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

9.1 The *Drive* Components

The *Drive* app includes the following components.

- The Drive search bar
- The Drive folder view
- The Drive tool bar
- The Drive navigation bar
- The Drive display area
- The file details
- The viewer

9.1.1 The Drive search bar

Enables you to search for files.

The search bar is displayed if the folder view is visible. In order to display the folder view, click on **View** in the tool bar. Enable **Folder view**.

Also see:

General description of the search bar (p. 28)
Searching for Files (p. 220)
Viewing files (p. 204)

9.1.2 The Drive tool bar

Contains functions for creating, editing and organising files and folders. Notes:

- Some functions are only available if you opened a folder for which you have the appropriate permissions to create or edit objects.
- Some buttons are only displayed, if objects have been selected.

Content

- **New**. Contains the following functions:
  - **Add local file**. Adds one or multiple local files.
  - Depending on the configuration, a function for adding files in an encrypted format will be available. Information on encrypting files can be found in *Encrypting Data with Guard* (p. 259)
  - **Add note**. Creates a simple text file.
  - **New text document**. Creates a new text document.
  - **New spreadsheet** Creates a new spreadsheet.
  - **Add new folder**. Creates a new folder.
- **Edit**. Edits a text file or an Office document. This function is only available if selecting a text file or an Office document.
- **Share** icon . This function allows sharing files or folders.
- **View** icon . Shows the contents of the selected file in the Viewer.
- **Download** icon . Downloads the files selected by you. Multiple files are downloaded as a zip archive.
- **Present** icon . Starts a presentation. This function is only available if you select a document in the PowerPoint or PDF format.
- **Delete** icon . Deletes the files or folders selected by you.
- **More actions** icon ☰. Opens a menu with additional functions. Notes:
  - If you selected multiple files, some functions are not available.
  - If displaying a document or a text file, the function **Save as PDF** is available.
- **View**. Allows selecting the view in the display area [201].

Also see:

General description of the tool bar (p. 29)
Creating Files or *Drive* Folders (p. 209)
Viewing files (p. 204)
Organising Files and *Drive* Folders (p. 211)
Sharing (p. 235)
encrypt files (p. 264)

9.1.3 The Drive folder view

Displays the folders.

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

Content

- *My files*. Contains your personal files and folders. By default, it contains folders for documents, music, images, and videos.
- *My shares*. Shows the files and folders shared by you for other users or external partners.
- *My attachments*. Displays the file attachments of E-Mail messages sent or received by you.
- *Trash*. Contains the files and folders deleted by you.
- *Shared files*. Contains files shared with you by other users.
- *Public files*. Contains files shared with all users.

Depending on the configuration, the content can differ from this information.

Functions

- If clicking on a folder, its contents are displayed.
- The **Actions** icon next to the selected folder offers functions for organising and exchanging data.
- The **Add storage account** button below the folders offers functions for adding cloud storage accounts that you set up in third party products like Dropbox.

Also see:

General description of the folder view (p. 30)
Folders (p. 228)
Sharing (p. 235)
Adding storage accounts (p. 223)

9.1.4 The Drive navigation bar

The navigation path is located below the tool bar. The following functions are available:

- navigate within the folder structure
- sort and select objects

Functions

- Navigation path. It shows the path to the folder opened. To open a parent folder, click on a path entry.
- **Sort by** button. Sorts the files in the display area by various criteria.
- **Select** button. Contains functions for selecting or filtering objects in the display area [201]:
  - select all files and folders, select all files, clear the selection
  - display certain file types only, display all file types

Also see:

Viewing files (p. 204)

9.1.5 The Drive display area

Displays the files and folders as a list, icons or tiles In order to select a view, click on **View** in the tool bar.

- For each file and folder a row with the following content is displayed in the **List** view.
  - An icon. There are different icons for the individual object types.
  - The name of the file or folder.
  - Date or time of the last change
  - In the case of files, the size is displayed.
- For each file and folder the following information is displayed in the **Icons** view.
  - An icon. If available, a file preview is shown.
  - the name of the file or folder
- Files and folders are displayed as squares in the **Tiles** view.
- Encrypted files are marked with the *Encrypted* icon
  . Information on encrypting files can be found in *Encrypting Data with Guard* (p. 259)

Functions

- In order to display details of a selected object, click on **View** in the tool bar. Enable **File Details**. Details are displayed in a side bar.
- In order to display specific object types only, click on **Select** in the navigation bar. Enable an entry below *Filter*.
  In order to display all objects, click on **Select** in the navigation bar. Enable the entry **All** below *Filter*.
- In order to sort objects, click on **Sort by** in the navigation bar. Enable an entry.
- Select a file or folder by clicking on it. You can also use your system's multi-selection functions.
  You can also use checkboxes to select files or folders. In order to display the checkboxes, click on **View** in the tool bar. Enable **Checkboxes**.
  To select all objects or files or to clear the selection, click on **Select** in the navigation bar. Click on an entry below *Select*.
- If double-clicking on a folder, it will be opened.
- For frequently used functions, you can use the context menu for a folder, a file or multiple files.

Also see:

General description of the display area (p. 31)

Viewing files (p. 204)
Downloading Files or Folder Contents (p. 208)
Organising Files and *Drive* Folders (p. 211)
Sharing (p. 235)

9.1.6 The file details

Displays information about the selected object in a side bar.

In order to display the side bar, click on **View** in the tool bar. Enable **File Details**.

Content

- *Details*. Displays general information about the object selected in the display area:
  - the name of the file or folder
  - file size or number of objects in the folder
  - date of the last change
  - the editor's name
  - the parent folder's name

  If you shared the object, the button next to *Shares* can be used to open the window for editing shares. When having selected an object in the *My attachments* folder, the **View message** button is displayed. If clicking on it, the respective E-Mail with the attachment is displayed.
- *Description*. Shows file comments, if available.
  In order to add a description, click on **Add a description**. In order to edit a description, click on **Edit description**.
- **Upload a new version** button. Click on this button to select a file that is uploaded as new version.
- If there are several file versions, the *Versions* area is displayed. For each version the following information is displayed:
  - The version's file name. If clicking on it, a menu with several functions opens:
  - the version's file size
  - name of the user who uploaded the version
  - date and time of the version's upload

Also see:

Viewing files (p. 204)
How to download files: (p. 208)
Organising Files and *Drive* Folders (p. 211)
Sharing (p. 235)
Working with versions (p. 218)

9.1.7 The viewer

Shows the contents of files.

In order to launch the viewer, do one of the following:

- Select a file. Click the **View** icon in the tool bar.
- Double-click on a file in the display area.
  Note: If double-clicking on an office document, the respective Documents is launched if configured accordingly.
- Select one or several files. Click on **View** in the context menu.

Content

- Name of the selected file. If clicking on the name, the *Rename* window opens.
- Depending on the selected file type, the respective functions are displayed.
  - If the selected file is editable, the **Edit** button is displayed.
  - If a document template is shown, the **New from template** button is displayed.
  - Depending on the content of the selected file, the **Zoom out** icon and the **Zoom in** icon are displayed.
  - If a presentation or a PDF document is shown, the **Present** icon is displayed.
- Functions
  - **Download** icon . Downloads the file.
  - **Share** icon . This function allows sharing data.
  - **More actions** icon . Opens a menu with additional functions. If displaying a document or a text file, the function **Print as PDF** is available. If there are several images, the **Run auto-play mode** function is available.
  - **View details** icon . Opens or closes a side bar with information about the file. The side bar contains the same functions as the side bar in the display area.
  - **Pop out** icon . Displays the contents of the selected file on a new page. For documents in the Office format, there are page navigation functions available:
  - **Close** icon . Closes the Viewer.
- If there are additional files, icons for browsing are displayed to the left and to the right of the view.

Also see:

Displaying files in the viewer (p. 205)
Holding a presentation (p. 206)
Organising Files and *Drive* Folders (p. 211)
Downloading Files or Folder Contents (p. 208)
Sharing (p. 235)
encrypt files (p. 264)

9.2 Viewing files

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

- display a file's content
- display attachments of E-Mail messages sent or received by you
- hold presentations in familiar Office formats or in the PDF format

9.2.1 Displaying files in the viewer

The following options are available:

- display text files, documents or images in the viewer
- view images as a slide show
- play audio and video files, provided they are in a suitable format

How to display files in the viewer:

1. Open a folder containing files.
2. In order to select a view for the objects, click on **View** in the tool bar. Select one of these entries: **List**, **Icons**, **Tiles**.
   In order to display details of a selected file, click on **View** in the tool bar. Enable **File Details**.
3. To change the sorting, click on **Sort by** in the navigation bar.
   In order to display specific object types only, click on **Select** in the navigation bar.
4. Use one of the following methods:
   - Double-click on a file in the display area.
   - Select one or several files in the display area. Click the **View** icon in the tool bar.
   - Select **View** from the context menu.

   To display details for the selected file, enable the **Show details** icon.
   In order to open the previous or next file, click the **Back** icon or the **Next** icon next to the view.

Depending on the file type, different functions can be available:

- If the file content cannot be displayed, a button for downloading the file will be shown.
- 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 pictures, an icon for starting a slide show is displayed in the centre of the picture.
- 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 on the browser used.
- In order to display the file in a new page, click the **Pop out** icon. For documents in the Office format, there are page navigation functions available:
  - In order to browse page by page or to view a specific page, use the elements above the document.
  - In order to navigate with the help of thumbnail images, activate the **Thumbnail** tab in the side bar. Click on a thumbnail image.

Also see:

Navigating within the folder structure (p. 231)

Searching for Files (p. 220)
Displaying E-Mail attachments (p. 206)
Holding a presentation (p. 206)
Downloading Files or Folder Contents (p. 208)

The Drive display area (p. 201)
The file details (p. 202)
The viewer (p. 203)

9.2.2 Displaying E-Mail attachments

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

How to display E-Mail attachments:

1. Open the **My attachments** folder.
2. To view an attachment's content, use the methods for viewing files.

   To display the E-Mail that belongs to the selected attachment, click on **View** in the tool bar. Enable **File Details**. Click on **View message**.

Also see:

Displaying files in the viewer (p. 205)
Holding a presentation (p. 206)
Downloading Files or Folder Contents (p. 208)
The Drive display area (p. 201)
The file details (p. 202)

9.2.3 Holding a presentation

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

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

How to hold a local presentation:

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

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

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

   You can use the icons on the right side of the tool bar to adjust the sheet size.
3. In order to start a local presentation, click on **Start presentation** in the tool bar. Select **Start local presentation**.

   During the presentation, the following functions are available:

   - To display a function bar, hover the mouse over the bottom of the screen. The following functions are available:
     browse, display a specific sheet, display the participants list, pause presentation, activate fullscreen mode.
   - If clicking on **Pause presentation**, the presentation is stopped at the current sheet.
   - If clicking the icon **Toggle fullscreen**, the fullscreen mode is activated You can use the [esc] key or the function bar at the bottom of the screen to leave the fullscreen mode.
4. In order to end the presentation, click on **End presentation** in the tool bar.

How to hold a remote presentation:

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

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

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

   You can use the icons on the right side of the tool bar 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 take part in the remote presentation are shown in the side bar.
4. Click on **Start presentation** in the tool bar. Select **Start remote presentation**.

   During the presentation, the following functions are available:
   - To display a function bar, hover the mouse over the bottom of the screen. The following functions are available:
     browse, display a specific sheet, display the participants list, pause presentation, activate fullscreen mode.
   - If clicking on **Pause presentation**, the presentation is stopped at the current sheet.
   - If clicking the icon **Toggle fullscreen** , the fullscreen mode is activated You can use the [esc] key or the function bar at the bottom of the screen to leave the fullscreen mode.
5. In order to end the presentation, click on **End presentation** in the tool bar.

Also see:

Displaying files in the viewer (p. 205)
Displaying E-Mail attachments (p. 206)
Downloading Files or Folder Contents (p. 208)

The Drive display area (p. 201)
The file details (p. 202)
The viewer (p. 203)

9.3 Downloading Files or Folder Contents

The following options are available:

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

How to download files:

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

Tip: Learn how to download a certain file version by reading Section 9.6.11, “Working with versions”.

How to download the complete contents of a folder:

1. In the folder view, select the folder with the content you want to download.
2. Click the **Actions** icon next to the folder name. Click on **Download entire folder**.
3. Complete the steps for downloading the folder. The folder's content is saved as a zip archive.

You can also download a folder by using the context menu in the display area.

Also see:

Displaying files in the viewer (p. 205)
Displaying E-Mail attachments (p. 206)
Holding a presentation (p. 206)
The Drive display area (p. 201)
The file details (p. 202)

9.4 Creating Files or *Drive* Folders

The following options are available:

- add new files in the current folder
- create new sub-folders

How to add new files:

1. Open a folder.
   Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click on **New** in the tool bar. Click on **Add local file**.
   Depending on the configuration, a function for adding files in an encrypted format will be available. Information on encrypting files can be found in *Encrypting Data with Guard* (p. 259)
3. Select one or several files in the *Upload file* window.
   Click on **Open**. The display area shows the current progress status.
   In order to cancel the process, click on **Cancel** at the bottom right side of the display area.
   In order to cancel the process for individual files, click on **File Details** at the bottom right side of the display area. Click on **Cancel** next to a file name in the *Upload progress* window.
   In the Settings, you can define whether a new file or a new version of a possibly existing file with the same name should be created.

Tips:

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

How to create a new folder:

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

Also see:

Viewing files (p. 204)
Creating or Editing Text Files (p. 210)
Organising Files and *Drive* Folders (p. 211)
Searching for Files (p. 220)

Folders (p. 228)
Sharing (p. 235)

The Drive display area (p. 201)
The file details (p. 202)

9.5 Creating or Editing Text Files

The following options are available:

- create text files with plain text
- edit existing text files

How to create a new text file:

1. Open a folder in the folder view.
   Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click on **New** in the tool bar. Click on **Add note**.
3. Enter a title.
   Enter the text or paste text from the clipboard.
   In order to edit the text, use common techniques from familiar applications.

How to edit a text file:

1. Open a folder containing text files, in the folder view.
   Note: Open a folder for which you have the permission to create objects.
2. Use one of the following methods:
   - Select a text file. Click on **Edit** in the tool bar.
   - Double-click on a text file.
   - Display a text file in the *Viewer*. Click on **Edit**.

   The text will be opened for editing.
3. In order to edit the text, use common techniques from familiar applications.

Also see:

Viewing files (p. 204)
Creating Files or *Drive* Folders (p. 209)
Organising Files and *Drive* Folders (p. 211)
Searching for Files (p. 220)
Sharing (p. 235)
General description of the editing window (p. 34)

9.6 Organising Files and *Drive* Folders

Some of the techniques for managing files require having all ready set up your own folders. Information on creating folders can be found in Creating Files or *Drive* Folders (p. 209).

The following options are available:

- Sending files as E-Mail attachments
- Editing file names
- Creating or editing descriptions
- Moving files or *Drive* folders
- Copying files
- Saving files as PDF
- Adding files to the portal
- Adding files or *Drive* folders to favourites
- Deleting files or *Drive* folders
- Locking or unlocking files
- Working with versions

9.6.1 Sending files as E-Mail attachments

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

How to send files as an E-Mail attachment:

1. Select one or several files in the display area.
2. Use one of the following methods:
   - Click the **More actions** icon ≡ in the tool bar. Click on **Send by e-mail** in the menu.
   - Click on **Send by e-mail** in the context menu.
   - Use the **More actions** icon ▤ in the *Viewer*.
3. In the E-Mail edit window, fill in the details to send a new E-Mail.

Also see:

The Drive display area (p. 201)
The viewer (p. 203)

9.6.2 Editing file names

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

How to edit the file name:

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

Also see:

Creating or editing descriptions (p. 213)
The Drive display area (p. 201)
The file details (p. 202)
The viewer (p. 203)

9.6.3 Creating or editing descriptions

You can create or edit a file's description.

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

How to create or edit a file's description:

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

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

Also see:

Editing file names (p. 212)
The Drive display area (p. 201)
The file details (p. 202)
The viewer (p. 203)

9.6.4 Moving files or *Drive* folders

You can move the following objects to another folder:

- one or multiple files
- one or multiple folders
- a combination of files and folders

Prerequisite: You need to have the appropriate permissions to create objects in the target folder.

How to move objects to another folder:

1. Select the objects in the display area.
2. Use one of the following methods:
   - Click the **More actions** icon ☰ in the tool bar. Select **Move** from the menu.
   - Select **Move** from the context menu.
   - Use drag and drop to move the items to a folder in the folder view.
3. Select a folder in the *Move* window. You can create a new folder by clicking on **Create folder**.
   Click on **Move**.

Also see:

Copying files (p. 214)
The Drive display area (p. 201)

9.6.5 Copying files

You can copy files to another folder: When copying a shared file, the permissions will not be copied. This means, the file's copy is not shared.

Prerequisite: You need to have the appropriate permissions to create objects in the target folder.

How to copy files to another folder:

1. Select one or several files in the display area.
2. Use one of the following methods:
   - Click the **More actions** icon in the tool bar. Select **Copy** from the menu.
   - Select **Copy** from the context menu.
3. Select a folder in the *Copy* window. You can create a new folder by clicking on **Create folder**. Click on **Copy**.

Also see:

Moving files or *Drive* folders (p. 213)
The Drive display area (p. 201)

9.6.6 Saving files as PDF

You can save documents and text files in PDF format. The PDF file will be saved to the folder that contains the document or text file.

How to save a file in the PDF format:

1. Select a file in the display area.
2. Use one of the following methods:
   - Click the **More actions** icon in the tool bar. Select **Save as PDF** from the menu.
   - Select **Save as PDF** from the context menu.
   - Use the **More actions** icon in the *Viewer*.
3. In the *Save as PDF* window, you can enter a name for the PDF file. Click on **Save**.

Also see:

Copying files (p. 214)
The Drive display area (p. 201)
The viewer (p. 203)

9.6.7 Adding files to the portal

You can add a file as widget to the Portal.

How to add a file to the portal:

Select a file in the display area. Click the **More actions** icon ☰ in the tool bar. Click on **Add to portal** in the menu.

Also see:

Customising the Portal (p. 51)
The Drive display area (p. 201)

9.6.8 Adding files or *Drive* folders to favourites

You can add frequently used objects like files or folders to the symbolic folder *Favourites*. The following functions are available:

- add objects to favourites
- remove objects from favourites

The original position of the objects in the folder view will not be affected by those actions.

How to add objects to *Favourites*:

1. Select the objects in the display area.
2. Use one of the following methods:
   - Click the **More actions** icon ☰ in the tool bar. Click on **Add to favourites** in the menu.
   - Select **Add to favourites** from the context menu.

Result: The objects are displayed in the upper part of the folder view below *Favourites*.

How to remove objects from *Favourites*:

1. In the folder view, click on **Favourites**. Select the objects in the display area.
2. Click on **Remove from favourites** in the tool bar.

Result: The objects are removed from *Favourites*. If *Favourites* is empty, the folder will be removed.

Also see:

Moving files or *Drive* folders (p. 213)
The Drive display area (p. 201)

9.6.9 Deleting files or *Drive* folders

You can delete objects in the same way as files and folders. The following options are available:

- delete object The objects are moved to the *Trash* folder.
- Restore deleted objects from the *Trash* folder.
  The objects are restored to their original location.
- Permanently delete objects from the *Trash* folder. You can also permanently delete all items in a folder by emptying the trash.

Warning: If you delete objects from the *Trash* folder, they are irrevocably deleted.

How to delete objects:

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

Result: The selected objects are deleted.

How to restore deleted objects:

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

Result: The objects are restored in their original location.

How to permanently delete objects:

Warning: Permanently deleted objects **cannot** be restored.

1. Open the *Trash* folder.
2. Select the objects.
3. Click the **Permanently delete** icon in the tool bar.
4. Confirm that you want to delete the items.

Result: The items are permanently deleted.

How to permanently delete the contents of the Trash folder:

Warning: Permanently deleted objects **cannot** be restored.

1. Select the *Trash* folder in the folder view.
2. Click the **Actions** icon next to the folder name. Click on **Empty folder**.
3. Confirm that you want to empty the folder.

Result: The objects in the trash are permanently deleted.

9.6.10 Locking or unlocking files

When editing a file, you can lock the file. The lock has the following purposes:

- The file lock informs other users that the file is currently being edited and might no longer be up to date.
- If the file is located in a folder that you share with other users whom you granted edit permissions, those users can not edit the locked file.
- If you are the owner of a shared file and another user locks the file, you can always unlock it.

How to lock files:

1. Select one or several files in the display area.
2. Click the **More actions** icon in the tool bar. Click on **Lock** in the menu.

How to unlock files:

1. Select one or several locked files in the display area.
2. Click the **More actions** icon in the tool bar. Click on **Unlock** in the menu.

9.6.11 Working with versions

The following options are available:

- open or save the current version
- upload a new version
- open or save a specific version
- set a specific version as the current version
- delete a specific version

How to open or save the current version:

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

How to upload a new version:

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

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

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

How to open or save a specific version:

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

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

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

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

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

How to delete a certain version:

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

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

Also see:

The Drive display area (p. 201)
The file details (p. 202)
The viewer (p. 203)

9.7 Searching for Files

In order to search for files, you can use the following search criteria:

- search terms for file names, file descriptions
- folders that are to be searched
- file type: all, audio, documents, images, other, video
- file size
- time frame of the latest change, related to the current date: last week, last month, last year
- folder type: all, private, public, shared

How to search for files:

1. Click on the **Search** input field in the menu bar. Additional icons are displayed.
2. Enter a search term in the input field. The search menu opens.

   Define the data sources to be searched by clicking on an entry in the search menu.
   - If clicking on the search term or pressing enter, the following data sources are searched: file name, description
   - In order to only search in the file names, click on **in file name** in the search menu. Accordingly, you can limit the search to the file description.

   The search results are displayed in the list that is shown in the display area.
3. To select a folder for the search, click the **Options** icon in the input field. The folder that is searched, is displayed in the **Folder** drop-down. To select another folder, open the drop-down.
   - If you select **All folders**, all private, public, and shared folders and sub-folders are searched. To limit the search to private, public or shared folders, click on **Options**. Select a type.
   - If you select a specific folder or the folder, only this folder is searched, but not sub-folders.
4. The following options are available for limiting the search to specific files:
   - To search for specific files, click the **Options** icon in the input field. Open the **File type** drop-down. Select a type.
   - To limit the search to files with a specific size, click the **Options** icon in the input field. Open the **File size** drop-down. Select a size.
   - To search for files that have been modified within a specific time frame, click the **Options** icon in the input field. Open the **Date** drop-down. Select a value.
5. To refine the search results, enter additional search terms: To remove a search term, click the **Remove** icon next to the search term.
6. In order to finish the search, click the **Close** icon in the input field.

9.8 Accessing Files with WebDAV

With WebDAV you can access the *Drive* app files in the same way as when accessing local files on your disk. Compared with the access from the Groupware GUI, WebDAV has advantages and disadvantages:

- The advantage is the quick and direct access with a file browser e.g. the Windows Explorer. You do not need to be logged in to the Groupware GUI.
- The disadvantage is that you can only see the current document version. Neither the version history nor additional information, like comments, are displayed.

Warning: If you delete a file with WebDAV, all versions will be lost, not only the current version.
Note: To create objects with WebDAV in a public or shared folder, you need to have at least the following permissions for the respective folder: create objects, edit own objects. To also read your own objects, you additionally need this permission: read own objects. Information on permissions can be found in 10.2.8: Which permissions can be used? (page 245).

Prior to accessing the *Drive* app files with a file browser, e.g. the Windows Explorer, you have to set up WebDAV access. Depending on the system software the procedure differs:

- Setting up WebDAV under Linux
- Setting up WebDAV under Windows 7

9.8.1 Setting up WebDAV under Linux

How to set up WebDAV access under Linux:

1. Open KDE Konqueror or a similar browser.
2. Enter the following address in the address bar:
webdav://<address>/servlet/webdav.infostore
Replace the <address> with the Groupware Server's IP address or URL.
3. Enter your username and password for accessing the Groupware Server.

Result: The *Drive* app files are displayed in the browser.

9.8.2 Setting up WebDAV under Windows 7

How to set up WebDAV access under Windows 7:

Prerequisite: The registry key *BasicAuthLevel* has to be set to *2* in the Windows registry database. Additional information can be found in the Microsoft articles http://support.microsoft.com/kb/928692 and https://support.microsoft.com/kb/841215.
Note: Depending on the Windows 7 setup, there can be delays when accessing WebDAV folders. If this is the case, follow the instructions in this article:
http://support.microsoft.com/kb/2445570.

1. In the navigation area of the Windows Explorer select the entry **Computer**.
2. In the icon bar click on **Connect drive**. The *Connect drive* window opens.
3. Click on **Connect to a Web site that you can use to store your documents**. The *Add network address* window opens. Click on **Next**.
4. Select **Select custom network address**. Click on **Next**.
5. In the *Add network path* dialogue window enter the following address:
   https://<address>/servlet/webdav.infostore
   where <address> needs to be replaced by the Groupware server's IP address or URL.
   Click on **Next**.
6. Enter your username and password for accessing the Groupware Server. Click on **OK**.
7. On the next page you can assign a name to the network address. Click on **Next**.
8. Click on **Finish**.

Result: Below **Computer** you can access your *Drive* app files.

9.9 Adding storage accounts

If you use third party cloud storage services like Google Drive, Dropbox, Box or OneDrive, you can access the data of those accounts from within the groupware by adding those accounts as storage accounts.

How to add a storage account:

1. In the folder view, click on **Add storage account**. The *Add storage account* window opens.
2. Click an icon. The next step depends on the cloud storage account provider:
    - If the provider asks for credentials, enter your credentials for the cloud storage account.
    - If the provider asks you for permission to access the data, grant this permission.

An entry for the storage account appears in the folder view. The entry contains this account's folders. Open one of those folders to do the following:

- You can use the folder view to access your storage account contents.
  Note: Depending on the storage account's functionality, working with versions might not be supported.
- Depending on the content, you can use the menu bar functions, e.g. to view pictures or to copy data.

Also see:

Editing accounts (p. 250)
Removing accounts (p. 250)

9.10 Files and Teams

You can share your files with internal users. Depending on the requirements, different methods exist.

- In *Public files* and in *Shared files* you can find file folders shared by other users.
- To make additional files available for internal users or external partners, proceed as follows:
  Create a new personal or public folder and copy or move the required files to this folder.
  Share this folder.
  You can also share an existing folder.

9.11 Drive Settings

How to use the Drive settings:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Drive** in the side bar.

The following settings are available:

Adding files with identical names
Defines whether a new file or a new version of a possibly existing file with the same name should be created.

- **Add new version**
  A new version of the file will be created.
- **Add new version and show notification**
  A new version of the file will be created. As soon as the process is finished, you will receive a notification.
- **Add separate file**
  A new file will be added. The file name is enhanced with a consecutive number.

Slide show / Auto-play mode
Defines how to present pictures that are displayed in the viewer

Advanced settings

- **Show hidden files and folders**
  Defines whether hidden files and folders are displayed. The names of hidden files and folders are preceded by a dot. The local Drive apps require such files and folders for internal purposes. In order to not endanger the functionality of the local Drive apps, such hidden files and folders must not be changed or deleted.

10 Data Organisation, Shared Objects, Security

Learn how to organise your data and how to share your data with others.

- Work more efficiently with folder management.
- Organise your team work with the help of shares.
- When you have set up additional E-Mail accounts, storage accounts or access to social networks, you can edit or remove those accounts.
- Use the data from your social networks by using subscriptions.
- Take care about security when handling your groupware data.

Information on encrypting E-Mail messages and files can be found in *Encrypting Data with Guard* (p. 259)

10.1 Folders

folders help you to:

- keep an overview of your objects
- share information with other users and external partners
- search for certain information and quickly find the information again

Folders are called differently in the following apps:

- A folder is called an address book in the *Address Book* app.
- A folder is called a calendar in the *Calendar* app.

The following information about folders can also be applied to address books and calendars.

- Folder types
- What is the purpose of permissions?
- Navigating within the folder structure
- Hiding folders
- Adding folders to favourites
- Renaming folders
- Moving folders
- Deleting folders

Additional information on files and folders in the *Drive* app can be found in Organising Files and *Drive* Folders.

Also see:

General description of the folder view (p. 30)

Adding E-Mail Folders (S. 76)
Adding Address Books (p. 117)
Adding Calendars (p. 155)
Adding Task Folders (p. 185)
Creating Files or *Drive* Folders (p. 209)

10.1.1 Folder types

The following folder types exist in the folder view:

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

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

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

Also see:

What is the purpose of permissions? (p. 230)

10.1.2 What is the purpose of permissions?

Permissions define what an internal user or external partner is allowed to do with a particular folder and its contents. The following information about folders can also be applied to address books and calendars.

- As an internal user you have preset permissions for existing folders.
  When creating a new folder, you will be granted the preset permissions.
- When inviting other persons to a shared item, you grant them specific permissions.

You have the following permissions for folders that already exist:

- You are the owner of your personal folders.
  The owner has the same permissions as an administrator. The owner has all permissions for this folder. The owner can grant other users permissions to the folder.
- 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*.

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

- If you create a new folder in a personal folder:
  - You are the owner.
  - In the *E-Mail* app and the *Drive* app, other users inherit their permissions for the parent folder. In the other apps, other users do not inherit permissions.
- If you create a new folder in the **Public files** folder:
  - You are the owner.
  - Other users will get no rights. You have to set the permissions for the new folder. If you then create new subfolders in this folder, the permissions for this folder are inherited by the new subfolders.
- If you create a new folder in the shared folder of another user:
  - The user who shared the folder is the administrator of the new folder.
  - You are the author of the new folder.
    An author is allowed to change or delete existing objects, to create and edit new objects, and to create subfolders.
  - 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.

Also see:

Folder types (p. 229)
Sharing (p. 235)
Which permissions can be used? (p. 245)
Use cases for permissions (p. 247)

10.1.3 Navigating within the folder structure

The following functions are available:

- open or close the folder view
- change the folder view width
- open or select a folder in the folder view or by using the navigation path

The following information about folders can also be applied to address books and calendars.

How to open or close the folder view:

Use one of the following methods:

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

How to change the folder view width:

1. Move the cursor to the right border of the folder view. A double arrow will be displayed.
2. Drag the border to the left or to the right.

How to open or select a folder:

1. If the folder view is closed, open it.
2. To view a folder's subfolders, click on the arrow next to the folder name.
3. Click on a folder. The folder's items are displayed in the detail view.
   Additionally have the following options in the *Drive* app.
   - Click on an entry in the navigation bar to open a parent folder.
   - To open a folder, double-click on it in the detail view.

Also see:

Displaying email messages (S. 65)
Working with tabs (S. 78)
Displaying contacts (p. 111)
Displaying appointments in the calendar view (p. 141)
Displaying appointments in the list view (p. 144)
Viewing tasks (p. 180)
Displaying files in the viewer (p. 205)
Hiding folders (p. 232)
Adding folders to favourites (p. 233)

10.1.4 Hiding folders

In the *Address Book*, *Calendar* or *Tasks* apps, you can hide certain personal, shared or public folders. The following functions are available:

- hide single folders
- display hidden folders again

Each hidden folder is displayed in a collective folder at the bottom of the folder view. The following information about folders can also be applied to address books and calendars.

How to hide a folder:

1. In the *Address Book*, *Calendar* or *Tasks* app, select the folder that you want to hide, in the folder view.
2. Click the **Actions** icon next to the folder name. Click on **Hide**.
   Note: If you select a folder that cannot be hidden, this function is not displayed.

How to display a hidden folder again:

1. Depending on the app, open the entry **Hidden address books**, **Hidden calendars** or **Hidden tasks** at the bottom of the folder view in the *Address Book*, *Calendar* or *Tasks* app. The hidden folders will be displayed.
2. Click the **Actions** icon next to a folder name. Click on **Show**.

Also see:

Navigating within the folder structure (p. 231)
Adding folders to favourites (p. 233)

10.1.5 Adding folders to favourites

You can add frequently used folders to the symbolic folder *Favourites*. The following functions are available:

- add folders to favourites
- remove folders from favourites

The original position of the objects in the folder view will not be affected by those actions. The following information about folders can also be applied to address books and calendars.

How to add a folder to *Favourites*:

1. Select a folder in the folder view.
2. Click the **Actions** icon next to the folder name. Click on **Add to favourites**.

Result: The folder is displayed in the upper part of the folder view below *Favourites*. If *Favourites* does not exist already, it will be created automatically.

How to remove a folder from *Favourites*:

1. Select a folder in the folder view below *Favourites*.
2. Click the **Actions** icon next to the folder name. Click on **Remove from favourites**.

   You can also activate this function by right-clicking on the folder in its original position in the folder view.

Result: The folder is removed from *Favourites*. If *Favourites* is empty, the folder will be removed.

Also see:

Navigating within the folder structure (p. 231)
Hiding folders (p. 232)

10.1.6 Renaming folders

You can rename subfolders in your personal folders. For other folders you need administrator permissions. The following information about folders can also be applied to address books and calendars.

How to rename a folder:

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

Also see:

Navigating within the folder structure (p. 231)
Moving folders (p. 234)
Deleting folders (p. 234)

10.1.7 Moving folders

You can move sub-folders from your personal folders. For other folders you need the appropriate permissions. For the target folder you need the permission to create sub-folders. The following information about folders can also be applied to address books and calendars.

How to move a folder:

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

Also see:

Navigating within the folder structure (p. 231)
Renaming folders (p. 233)
Deleting folders (p. 234)

10.1.8 Deleting folders

You can delete subfolders in your personal folders. For other folders you need the appropriate permissions. The following information about folders can also be applied to address books and calendars.

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

How to delete a folder:

1. In the folder view, select the folder that you want to delete.
2. Click the **Actions** icon ☰ next to the folder name. Click the **Delete** button.
3. Confirm that you want to delete the folder.

Result: The folder and its objects are permanently deleted.

Also see:

Navigating within the folder structure (p. 231)
Renaming folders (p. 233)
Moving folders (p. 234)

10.2 Sharing

By sharing data with read or edit access, you can co-operate with internal users or external partners. You can share items like E-Mail messages, address books, calendars, tasks, folders or files. When sharing items, particular permissions are granted to the persons you share the items with.

Note the following:

- In order to share data, you need to have administrator permissions for the respective folder.
- The global address book cannot be shared.
- E-Mail messages can only be shared with internal users, not with external partners.
- Address books, calendars, and tasks can only be shared with external partners with read access, not with edit access.
- If you share a folder in the Drive app, you can define whether subfolders should be shared as well.

Information about permissions that can be used when sharing, are to be found here:

- Which permissions can be used? (p. 245)
- Use cases for permissions (p. 247)

Also see:

What is the purpose of permissions? (p. 230)

10.2.1 Sharing with public links

You can share data with read access by creating a public link. You can give this link to other persons. Everyone who gets this link can view the data.

The following options are available:

- You can share the following data with read access by using a public link: address books, calendars, tasks, folders. files.
  E-Mail messages cannot be shared with a public link.
- You can set a password for the access. You can define that the link expires after a specific time frame, e.g. after one month.
- You can revoke the public link.

The following information about folders can also be applied to address books and calendars.

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

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

   Select a folder in the folder view.

   Note: Select a folder for which you have the permission to share. Depending on the app, some folders cannot be shared.

   In the Drive, you can also select a folder or file in the display area.

2. Click the **Actions** icon next to the folder name. Click on **Create sharing link**.

   In the Drive app, you can also use one of the following methods:

   - Click the **Share** icon in the tool bar. Click on **Invite people**.
   - Select **Invite people** from the context menu.

   A window opens. It contains a public link for read access to the share.

3. To share the link, the following options are available:

   - To insert the link into other applications, click the **Copy to clipboard** icon next to the link.
   - In order to directly send the link by E-Mail, enter the respective E-Mail addresses. Tips:
     - While entering the E-Mail address, several matching suggestions are displayed. To accept a suggestion, click on it.
     - To select contacts from a list, click the **Address book**icon on the right side of the input field.

     You can enter a message for the recipients.
   - By default, the data are shared with read access for an unlimited time. To set a time limit for the access to the shared data, enable **Expires in**. Select a time range.
   - To protect the access with a password, enable **Password required**. Enter a password. If you send the public link by E-Mail, the E-Mail contains the password.

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

5. Click on **Close**.

Also see:

Selecting contacts from an address book (S. 69)
Inviting to a shared item (p. 238)
Editing shares (p. 240)
Resending an invitation (p. 241)
Removing shares (p. 242)
Viewing or editing shares in the Drive app (p. 243)
Accessing other users' shares (p. 244)

10.2.2 Inviting to a shared item

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

The following options are available:

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

When sharing items, internal users or external partners are granted certain permissions for the shared data.

Note the following:

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

The following information about folders can also be applied to address books and calendars.

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

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

   Select a folder in the folder view.

   Note: Select a folder for which you have the permission to share. Depending on the app, some folders cannot be shared.

   In the Drive, you can also select a folder or file in the display area.
2. Click the **Actions** icon next to the folder name. Click on **Permissions / Invite people**.

   In the Drive app, you can also use one of the following methods:
   - Click the **Share** icon in the tool bar. Click on **Create sharing link**.
   - Select **Create sharing link** from the context menu.

   The window for adjusting the permissions opens.
3. Enter a name or an E-Mail address in *Add people*. Tips:
   - While entering the recipients, matching suggestions are displayed. To accept a suggestion, click on it.
   - To select contacts from a list, click the **Address book**icon on the right side of the input field.

   The selection 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, the following options are available:
   - To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.
   - To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu.
   - In order to remove a permission, click the **Action** icon next to the name. Click on **Revoke access**.
5. If no E-Mail notifications about the shared item are to be sent, disable **Send notifications**.

   Note: The checkbox cannot be enabled when inviting external partners to a shared item.
6. If you share a folder in the Drive app, you can transfer the folder's permissions to all existing or newly created subfolders of this folder. To do so, enable **Apply to all subfolders**.
7. Click on **Save**.

Also see:

Selecting contacts from an address book (S. 69)
Sharing with public links (p. 236)
Editing shares (p. 240)
Resending an invitation (p. 241)
Removing shares (p. 242)
Viewing or editing shares in the Drive app (p. 243)
Accessing other users' shares (p. 244)
Which permissions can be used? (p. 245)
Use cases for permissions (p. 247)

10.2.3 Editing shares

The following options are available:

- adjust user roles or permissions
- add new persons to a share

The following information about folders can also be applied to address books and calendars.

How to edit existing shares:

1. In the folder view, select a folder that you shared.
2. Click the **Actions** icon next to the folder name. Click on **Permissions / Invite people**.
   In the Drive app, you can also click the **Share** icon in the tool bar. Click on **Invite people**.
   The window for adjusting the permissions opens.
3. To edit the user roles or permissions, the following options are available:
   - 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 administrator permissions of a personal folder.
     - Permissions cannot be changed for public links.
     - Guests only get read permissions. You cannot change this permission.
4. In order to add new persons, enter an E-Mail address in *Add people*. The E-Mail address will be added to the list as internal user, group or guest.
   Tips:
   - While entering the E-Mail address, several matching suggestions are displayed. To accept a suggestion, click on it.
   - To select contacts from a list, click the **Address book** icon on the right side of the input field.
5. Click on **Save**.

Also see:

Selecting contacts from an address book (S. 69)
Sharing with public links (p. 236)
Inviting to a shared item (p. 238)
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10.2.4 Resending an invitation

You can resend an invitation to an already granted share. The following information about folders can also be applied to address books and calendars.

How to resend an invitation to a person:

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

Also see:

Sharing with public links (p. 236)
Inviting to a shared item (p. 238)
Editing shares (p. 240)
Removing shares (p. 242)
Viewing or editing shares in the Drive app (p. 243)
Accessing other users' shares (p. 244)

10.2.5 Removing shares

The following options are available:

- remove shares for individual persons or remove a public link
- remove all existing permissions for a file or a folder in the Drive app

The following information about folders can also be applied to address books and calendars.

How to remove shares for single persons or remove a public link.

1. In the folder view, select a folder that you shared.
2. Click the **Actions** icon next to the folder name. Click on **Permissions / Invite people**.
   In the Drive app, you can also click the **Share** icon in the tool bar. Click on **Invite people**.
   The window for adjusting the permissions opens.
3. Click the **Actions** icon next to a person's name or next to *Public link*. Click on **Revoke access** in the menu.
4. Click on **Save**.

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

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

Also see:

Sharing with public links (p. 236)
Inviting to a shared item (p. 238)
Editing shares (p. 240)
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Viewing or editing shares in the Drive app (p. 243)
Accessing other users' shares (p. 244)

10.2.6 Viewing or editing shares in the Drive app

In addition to the basic functions, the following options are available in the Drive app:

- You can display your shared objects as a list. You can sort the list by different criteria.
- You can edit or revoke shares.

How to view your shares in the Drive app:

1. In the Drive app, open **My shares** in the folder view.
   The folders and files shared by you are displayed in the detail view. For each share a row with the following details is displayed in the detail view:
   - An icon indicates the share's object type: file or folder.
   - The share's name and folder path. To open a folder, click on a path entry.
   - Three icons in different colours indicate whether an object has been shared with specific users:
     - The icon indicates whether the object has been shared 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.
   - To display the folder of a shared object, open the object's context menu. Select **Show in Drive**.
   - To display the content of a share's parent folder, click on a path entry in the list.

How to edit a share in the Drive app:

1. In the Drive app, open **My shares** in the folder view.
   The folders and files shared by you are displayed in the detail view.
2. Select a folder or file in the detail view. The following options are available:
   - To edit the share, click on **Edit share** in the tool bar or context menu.
     Depending on the type of share, the window for editing the public link or the window for changing the permissions opens. Change the settings.
   - To revoke the share, click on **Revoke access** in the tool bar or context menu.

Also see:

Sharing with public links (p. 236)
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What is the purpose of permissions? (p. 230)

10.2.7 Accessing other users' shares

In the folder view, you have access to data shared with you by other users. The following information about folders can also be applied to address books and calendars.

How to access data shared by other users:

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

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

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

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

Also see:

Sharing with public links (p. 236)
Inviting to a shared item (p. 238)
Editing shares (p. 240)
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10.2.8 Which permissions can be used?

In order to easily grant logical permission combinations, there are specific preset user roles: A user role consists of logical permission combinations. You can also grant detailed permissions. You can grant such permissions by sharing objects. The following information about folders can also be applied to address books and calendars.

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, rename folders
- Object permissions: read all objects, edit all objects, delete all objects

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

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

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

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

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

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

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

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

Also see:

Inviting to a shared item (p. 238)
Accessing other users' shares (p. 244)
Editing shares (p. 240)
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Removing shares (p. 242)
Viewing or editing shares in the Drive app (p. 243)

Use cases for permissions (p. 247)

What is the purpose of permissions? (p. 230)

10.2.9 Use cases for permissions

The following examples show which permissions need to be granted to other users or external partners to enable them to execute specific actions in a shared folder. You can grant such permissions by sharing objects. The following information about folders can also be applied to address books and calendars.

- **Example 1:** View objects. Not change and delete objects. Not create new objects.
  Settings in *Details*:
  - *Folders*: view the folder
  - *Read permissions*: read all objects
  - *Write permissions*: none
  - *Delete permissions*: none
  - *Administrative role*: User

  You can also assign the **Viewer** role.
- **Example 2:** View objects. Not change and delete objects. Create and edit new objects.
  Settings in *Details*:
  - *Folders*: view the folder
  - *Read permissions*: read all objects
  - *Write permissions*: edit own objects
  - *Delete permissions*: delete own objects
  - *Administrative role*: User
- **Example 3:** Not view existing objects. Create and edit new objects.
  Settings in *Details*:
  - *Folders*: create objects
  - *Read permissions*: read own objects
  - *Write permissions*: edit own objects
  - *Delete permissions*: delete own objects
  - *Administrative role*: User
- **Example 4:** View and edit all objects. Create and edit subfolders and objects,
  Settings in *Details*:
  - *Folders*: create objects and subfolders
  - *Read permissions*: read all objects
  - *Write permissions*: edit all objects
  - *Delete permissions*: delete all objects
  - *Administrative role*: User

  You can also assign the **Author** role.
- **Example 5:** All permissions. Grant permissions to other users.
  Settings in *Details*:
  - *Folders*: create objects and subfolders
  - *Read permissions*: read all objects
  - *Write permissions*: edit all objects
  - *Delete permissions*: delete all objects
  - *Administrative role*: Administrator

  You can also assign the **Administrator** role.

Also see:

Inviting to a shared item (p. 238)
Accessing other users' shares (p. 244)
Editing shares (p. 240)
Resending an invitation (p. 241)
Removing shares (p. 242)
Viewing or editing shares in the Drive app (p. 243)
Which permissions can be used? (p. 245)
What is the purpose of permissions? (p. 230)

10.3 Accounts

The following options are available:

- Editing the primary E-Mail account (p. 249)
- Editing accounts (p. 250)
  You can edit these accounts: external E-Mail accounts, storage accounts, accounts for social networks
- Removing accounts (p. 250)

10.3.1 Editing the primary E-Mail account

The following options are available:

- You can change the name of your primary E-Mail account. This name is displayed in the E-Mail settings.
- Change the preset sender name.
- You can change the folders of your primary E-Mail account by assigning other folders to a standard folder.

How to edit the primary E-Mail account:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Accounts**.
3. Click on **Edit** next to *E-Mail* in the display area. The *Edit mail account* window displays the current settings.
4. To change the account name, click into the input field next to **Account name**.
   Note: The entries for *Incoming server* and *Outgoing server* cannot be changed.
5. To change the preset sender name, click into the input field next to **Your name**.
   You can overwrite this preset name when composing an E-Mail.
6. To select other folders, browse down to *Standard folders*.
   Click on **Select** next to a folder. Select another folder.
7. Click on **Save** at the bottom of the window.

Also see:

Settings for composing E-Mail messages (S. 102)
Editing accounts (p. 250)

10.3.2 Editing accounts

Depending on the account type, you can edit different account settings:

- For E-Mail accounts: account name, sender name, Unified Mail usage, server parameters, folder names
- For storage accounts: folder name, re-authorisation of the data access
- For social networks: account name, re-authorisation of the data access

How to edit an account:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Accounts**.
3. Click on **Edit** next to an account in the display area. The settings are displayed in a window.
   If you use multiple services from the selected provider e.g., E-Mail and cloud storage, select the service you want to edit.
4. Change the settings.
   Notes for editing external E-Mail accounts:
   - To change the preset sender name, click into the input field next to **Your name**.
   - You can overwrite this preset name when composing an E-Mail.
5. Click on **Save** at the bottom of the window.

Also see:

Adding a Portal widget for social networks (p. 52)
Adding E-Mail Accounts (S. 98)
Using Unified Mail (S. 88)
Selecting sender address (S. 69)
Adding storage accounts (p. 223)
Editing the primary E-Mail account (p. 249)
Removing accounts (p. 250)

10.3.3 Removing accounts

If you no longer want to access an account from within the groupware, you can delete this account. You can remove all accounts except your primary E-Mail account.

How to remove an account:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Accounts**.
3. Click the **Delete** icon

Also see:

Adding a Portal widget for social networks (p. 52)
Adding E-Mail Accounts (S. 98)
Adding storage accounts (p. 223)
Editing the primary E-Mail account (p. 249)
Editing accounts (p. 250)

10.4 Managing Subscriptions

In this section you will learn how to manage the subscriptions that you set up:

- appointments from your Google calendar or from calendars that are publicly available on the Internet.
- calendars that are publicly available on the Internet.
- contacts from your social networks

The following options are available:

- refresh subscribed data
  You can transfer changes that have been applied to subscribed data to the groupware by refreshing the subscribed data.
- Managing subscribed folders
  In order to keep the overview of your subscribed data, you can manage it on an overview page.

10.4.1 refresh subscribed data

The following changes are applied when refreshing subscribed data:

- new appointments or contacts
- edited appointments or contacts
- deleted appointments

How to refresh subscribed data:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Subscriptions**.
3. Click on **refresh** next to a subscription in the display area.

Also see:

Subscribing to external address books (p. 117)
Subscribing to public calendars (p. 156)
Subscribing to Google calendars (p. 157)
Managing subscribed folders (p. 251)

10.4.2 Managing subscribed folders

The following options are available:

- show all subscriptions
- disable or enable a subscription
- remove a subscription

How to display all subscriptions:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Subscriptions**.
3. To show the folder with the subscribed data, click on the navigation path below the subscription's name.

Tip: You can only view information for a specific folder. To do so, click the **Subscriptions** icon next to a folder with subscriptions, in the folder view.

How to disable or enable a subscription:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Subscriptions**.
3. Click on **Disable** or **Enable** in the display area next to a subscription.

How to remove a subscription:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Subscriptions**.
3. Click the **Delete** icon next to a subscription in the display area.

Also see:

Subscribing to external address books (p. 117)
Subscribing to public calendars (p. 156)
Subscribing to Google calendars (p. 157)
refresh subscribed data (p. 251)

10.5 Security

In this section you will learn about security measures when working with the groupware.

- Protect your data against unauthorised access.
- Minimise the threat of malware.
- Prevent the reception of unwanted messages.

The following options are available:

- Automatic sign out (p. 254)
  You can define whether you are automatically signed out.
- Externally linked images in E-Mail messages (p. 254)
  You can define whether externally linked images in E-Mail messages are automatically loaded and displayed.
- Show e-mail authenticity (p. 255)
  You can define the E-Mail messages for which the authenticity is displayed.
  Note: Depending on the configuration, this function might not be available.
- Using a whitelist (p. 256)
  You can enter trusted E-Mail sources in a whitelist.
  Note: Depending on the configuration, this function might not be available.
- Displaying or terminating sessions (p. 257)
  You can display active sessions and terminate them if required.

In addition, you can encrypt your E-Mail messages and files. Information on encryption can be found in *Encrypting Data with Guard* (p. 259)

10.5.1 Automatic sign out

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

How to define whether you are automatically signed out:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Security**.
3. Select an entry from the **Automatic sign out** drop-down in the display area.

Also see:

Externally linked images in E-Mail messages (p. 254)
Show e-mail authenticity (p. 255)
Using a whitelist (p. 256)
Displaying or terminating sessions (p. 257)

10.5.2 Externally linked images in E-Mail messages

Externally linked images are not part of the E-Mail itself. They are loaded from an external source upon reading the E-Mail. You can define whether those images are loaded and displayed. If you allow loading externally linked images, your privacy and computer are endangered by the following security issues:

- The sender can gather information, e.g. whether your E-Mail address is valid or when you retrieved the E-Mail. Such information can e.g. be used to purposefully send spam E-Mail messages.
- The externally linked graphic can be used to infect your computer with malware.

How to define the loading of externally linked images:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Security**.
3. You can enable or disable the **Allow pre-loading of externally linked images** option in the display area.
   - If externally linked images are not to be displayed, disable the setting.
   - If externally linked images are to be loaded and displayed, enable the setting.

Also see:

Automatic sign out (p. 254)
Show e-mail authenticity (p. 255)
Using a whitelist (p. 256)
Displaying or terminating sessions (p. 257)
Displaying email messages (S. 65)

10.5.3 Show e-mail authenticity

For incoming E-Mail messages, the server checks whether the E-Mail actually originates from the provided sender address. The check is run to identify illegitimate E-Mail messages. The E-Mail authenticity check provides one of the following results:

- **Dangerous**. The E-Mail is classified as potentially dangerous. In the detail view, the sender is displayed in red font colour.
- **Neutral**. The authenticity cannot definitely be verified. In the detail view, the sender is displayed in yellow font colour.
- **Valid**. The verification was successful. In the detail view, the sender is displayed in green font colour.
- **Trusted**. The verification was successful. The E-Mail was sent from a trustworthy address.

Depending on the configuration, you can define the E-Mail messages for which the authenticity is displayed.

How to define the E-Mail messages for which the authenticity is displayed:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Security**.
3. Select an entry from the **Show email authenticity** drop-down in the display area.
   - **Disabled**. No authenticity is displayed. If a hoster marks the E-Mail sent from the hoster's address as trustworthy though, this authenticity will be displayed.
   - **Suspicious and unclassified e-mail messages only**. Displays the authenticity for the following E-Mail messages:
     - E-Mail messages that are classified as potentially dangerous.
     - E-Mail messages for which the authenticity could not definitely be verified
   - **All E-Mail messages**. Displays the authenticity for all E-Mail messages.

Also see:

Displaying email messages (S. 65)
Automatic sign out (p. 254)
Externally linked images in E-Mail messages (p. 254)
Using a whitelist (p. 256)
Displaying or terminating sessions (p. 257)
Displaying email messages (S. 65)
The E-Mail detail view (S. 62)

10.5.4 Using a whitelist

Depending on the configuration, you can create a whitelist. All E-Mail messages from senders who are recorded in the whitelist, are treated as follows:

- The E-Mail is not treated as unwanted E-Mail.
- The E-Mail source is labeled as trustworthy.
- Externally linked images are immediately loaded and displayed.

Warning: When making entries into the whitelist, several security measures are circumvented. Only enter E-Mails or domain names in the whitelist if you absolutely trust them.

How to create a whitelist:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Security**.
3. Enter the respective E-Mail addresses or domain names as comma separated list in the input field below *Always trust e-mail messages from the following senders* in the display area. Please also note:
   - When entering multiple E-Mail addresses or domain names, separate the entries with a comma.
   - Make sure to enter the exact E-Mail addresses or domain names.

Also see:

Automatic sign out (p. 254)
Externally linked images in E-Mail messages (p. 254)
Show e-mail authenticity (p. 255)
Displaying or terminating sessions (p. 257)
Displaying email messages (S. 65)

10.5.5 Displaying or terminating sessions

You can be logged in to your groupware account with different devices on various clients simultaneously, e.g. with desktop browsers, E-Mail clients, tablets, smartphones. With each login, an active session is created on the groupware server. On the following occasions it can make sense to list active sessions and to terminate them if required:

- You want to check whether you are logged in to a certain device or client.
- You want to log out from a certain device.
- You want to prevent reaching the maximum number of allowed sessions as you then could no longer log in from an additional device.

The following options are available:

- display all active sessions
- terminate single sessions
- terminate all sessions except the current one

How to edit the active sessions:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select **Security** in the side bar. Click on **Active clients**.
   All active sessions are listed in the display area.
3. In order to terminate sessions, do one of the following:
   - In order to terminate a single session, click on **Sign out** next to the client.
   - To terminate all sessions except the active one, click on **Sign out from all clients**.

Also see:

Automatic sign out (p. 254)
Externally linked images in E-Mail messages (p. 254)
Show e-mail authenticity (p. 255)
Using a whitelist (p. 256)

11 Encrypting Data with Guard

Guard is a groupware security component that allows to encrypt E-Mail messages and files.

- Encrypt your E-Mail communication with other users or external partners.
- Encrypt your files. Share the encrypted data with other users.
- Use the security options to define the encryption level.
- The encrypted data are password-protected. Depending on the configuration, you can reset your password if forgotten.

Learn how to work with the *Guard* application.

- apply basic settings
- encrypt E-Mail communications
- encrypt files
- encrypt Office documents
- sign out from Guard
- apply security settings

Information on additional security-related topics can be found in Security (p. 253).

11.1 Setting up *Guard*

Prior to using *Guard*, you have to apply some basic settings:

- First of all you have to enter a Guard security password that is used to encrypt data and to access encrypted data.
- Enter a secondary E-Mail address that is used if you forget your Guard security password. In this case, use the function for resetting the Guard security password. A new password will then be sent to you. For security reasons, it is highly recommended to enter a secondary E-Mail address for this purpose. Otherwise the new password is sent to your primary E-Mail account.

There are two options for the basic settings:

- Define the basic settings while initially using an encryption function.
- Define the basic settings in the groupware settings before using the encryption function.

How to define the basic settings when initially using an encryption function:

1. Enable the encryption function when composing an E-Mail, encrypting a file or uploading a new file by clicking on the **Encrypt** icon .
2. You consecutively will be asked to enter a Guard security password and a secondary E-Mail address. Enter the data.

How to define the basic settings before initially using encryption:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select **Security** in the side bar. Click on **Guard Security**.

   When initially opening the Guard security settings, the *Guard Create Security Keys* window opens.
3. In the **Password** field, enter the password that you want to use for encrypting your data.

   Confirm the password in the **Verify** field by entering it again.
4. In the **Enter new secondary e-mail** field, enter the E-Mail address that is used for receiving a temporary password for resetting your Guard security password.
5. Click on **OK**.

11.2 Encrypting E-Mail Conversations

The following options are available:

- Reading encrypted E-Mail messages
- Sending encrypted E-Mail messages
- How can external recipients read an encrypted E-Mail?

11.2.1 Reading encrypted E-Mail messages

To be able to read an encrypted E-Mail, the Guard security password is required.

How to read an encrypted E-Mail:

1. Select an E-Mail with the *Encrypted* icon . In the detail view, the notification *Secure E-Mail, enter your Guard security password.* is displayed.

   Note: If, when having used guard the last time, you set that Guard should remember the security password, the E-Mail will be displayed immediately.

2. Enter the Guard security password.

   You can define how long the security password should be remembered by Guard. To do so, enable Keep me logged into **Guard** . Select a time range from the list.

   In the Guard security settings, you can define a default value for the time range.

3. Click on **OK**. The content is shown in plain text.

   If the E-Mail includes attachments, functions for using the attachments' decrypted or encrypted versions are displayed.

Also see:

Sending encrypted E-Mail messages (p. 262)
How can external recipients read an encrypted E-Mail? (p. 263)

11.2.2 Sending encrypted E-Mail messages

The following options are available:

- Sending an encrypted E-Mail. Only you and the recipients can read the E-Mail content.
- Sending an E-Mail with a signature. The signature ensures that the recipient is able to recognise whether the E-Mail content has been changed in transport.
- Sending an encrypted E-Mail with a signature.

How to send an encrypted E-Mail:

1. Compose an E-Mail in the *E-Mail* app as usual.

   In the *Compose* page, click the **Encrypt** icon on the upper right side.

   You can also click on **Security** below the subject. Depending on the configuration of the Guard security settings, the menu contains different entries:

   - If **Show advanced settings** is disabled, click on **Secure**.
   - If **Show advanced settings** is disabled, click on **Secure**.

   Icons next to the recipients indicate whether the message can be encrypted for this recipient. If hovering over an icon, a description will be displayed.
2. In order to additionally sign the E-Mail, click on **Security**. Enable **Sign**.
3. If **Show advanced settings** is enabled in the Guard security settings, you can use additional options. To do so, click on **Security**. You can activate the following options:
   - By default, encrypted E-Mail messages are sent in **PGP Mime** format. Some older clients only support PGP Inline. If the recipient uses such a client, enable **PGP Inline**.
     If you use **PGP Inline**, you can not send E-Mail messages in HTML format.
   - To enable The E-Mail recipient to send an encrypted reply, the recipient needs to have your public key. You can send your public key as an attachment. To do so, enable **Attach my key**.
4. Click on **Send encrypted**.

   When sending to new recipients, a window is displayed that allows to send notes for opening the encrypted E-Mail to the recipients.

Also see:

GuardSettings (p. 271)
Reading encrypted E-Mail messages (p. 261)
How can external recipients read an encrypted E-Mail? (p. 263)

11.2.3 How can external recipients read an encrypted E-Mail?

You can also send encrypted E-Mail messages to external recipients who are not groupware users. When adding an external recipient, Guard checks whether a public key is available for this E-Mail address. Depending on the result, Guard uses different procedures for sending the encrypted E-Mail:

- If there is a public key for the recipient:
  - The message is sent encrypted with this key. The recipient can read the message with his/her private key.
- If there is no public key for the recipient:
  - If the external user already has a guest account, he/she receives an E-Mail with the link to the login page of his/her guest account. When having logged in, he/she can read the encrypted E-Mail on the guest page. He/she can send an encrypted reply from this page.
  - If there is no guest account, a guest account will be created. The external recipient receives an E-Mail with a link to a guest page and an automatically created password. The user logs in to the guest page. Then he/she can create their own password.
    Depending on the configuration, the automatically created password and the link to the guest page are sent in separate E-Mail messages.
    Depending on the configuration, the first E-Mail to the external recipient can be protected with a four-digit pin.
  - Depending on the configuration, guest account E-Mail messages are deleted from the server after a specific number of days.

  The external recipient can send an encrypted reply to the encrypted E-Mail. It is not possible to add additional recipients though.

Also see:

Reading encrypted E-Mail messages (p. 261)
Sending encrypted E-Mail messages (p. 262)

11.3 encrypt files

The following options are available:

- encrypt files
- Creating new encrypted files
- Opening encrypted files
- Downloading encrypted files
- Decrypting files

11.3.1 encrypt files

When encrypting a file, only the last version of these files will be encrypted. All other versions will be deleted.

How to encrypt a file:

Warning: When encrypting a file, all versions of this file will be deleted, except for the current version. If you need to keep an older version, save it before encrypting the file.

1. Select one or several files in the *Drive* app.
2. Use one of the following methods:
   - Click the **Actions** icon in the tool bar. Click on **Encrypt** in the menu.
   - Select **Encrypt** from the context menu.
   - Use the **More actions** icon in the *Viewer*. Click on **Encrypt** in the menu.

Also see:

Creating new encrypted files (p. 265)
Opening encrypted files (p. 265)
Downloading encrypted files (p. 266)
Decrypting files (p. 266)

11.3.2 Creating new encrypted files

You can create a new encrypted file by uploading a local file with encryption.

How to create a new encrypted file:

1. In the *Drive* app, open a folder in the folder view.
   Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click on **New** in the tool bar. Click on **Add and encrypt local file**.
3. Select one or several files in the *Upload file* window.
   Click on **Open**. The display area shows the current progress.
   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 also create a new encrypted file by dragging a file from your operating system's desktop to the *Drive* app window and drop it in the upper part.

Also see:

encrypt files (p. 264)
Opening encrypted files (p. 265)
Downloading encrypted files (p. 266)
Decrypting files (p. 266)

11.3.3 Opening encrypted files

You can open and read an encrypted file. The file remains encrypted on the server.

How to open an encrypted file:

1. In the *Drive* app, select an encrypted file in the display area. Click the **View** icon in the menu bar.
2. If the *Enter Guard security password* window opens, enter the Guard security password.
   You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.
   In the Guard security settings, you can define a default value for the time range.
   Click on **OK**.

Also see:

encrypt files (p. 264)
Creating new encrypted files (p. 265)
Downloading encrypted files (p. 266)
Decrypting files (p. 266)

11.3.4 Downloading encrypted files

You can download an encrypted file to locally read or edit it. The file remains encrypted on the server.

How to download an encrypted file:

1. In the *Drive* app, select an encrypted file in the display area. Click the **View** icon in the menu bar.
   Note: If you click on **Download** in the tool bar or context menu instead, the downloaded file remains encrypted.
2. The *Enter Guard security password* window opens. Enter the Guard security password.
   You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.
   In the Guard security settings, you can define a default value for the time range.
   Click on **OK**.
3. Click the **More actions** icon in the Viewer. Click on **Download Decrypted**.

Also see:

encrypt files (p. 264)
Creating new encrypted files (p. 265)
Opening encrypted files (p. 265)
Decrypting files (p. 266)

11.3.5 Decrypting files

You can remove a file's encryption by decrypting the file.

How to decrypt a file:

1. In the *Drive* app, select an encrypted file in the display area.
2. Use one of the following methods:
   - Click the **Actions** icon in the tool bar. Click on **Remove Encryption** in the menu.
   - Select **Remove Encryption** from the context menu.
3. The *Enter Guard security password* window opens. Enter the Guard security password.
   You can define how long the Guard security password should be valid. To do so, enable **Remember my password**. Select a value from the list.
   In the Guard security settings, you can define a default value for the time range.
   Click on **OK**.

Also see:

encrypt files (p. 264)
Creating new encrypted files (p. 265)
Opening encrypted files (p. 265)
Downloading encrypted files (p. 266)

11.4 Encrypting Office Documents

The following options are available:

- Creating new encrypted documents
- Saving selected documents in an encrypted format
- Opening an encrypted document

Additional functions are available in the *Drive* app:

- encrypt existing documents
- decrypt documents

11.4.1 Creating new encrypted documents

When creating a new document, you have the option to create a document that will be saved encrypted..

How to create a new encrypted document:

1. Depending on whether you want to create an encrypted text document, spreadsheet or presentation, select one of the apps *Text*, *Spreadsheet* or *Presentation*.
2. In the Office menu bar, click on one of the respective buttons **New text document (encrypted)**, **New spreadsheet (encrypted)**, **New presentation (encrytped)**.
3. If the *Enter Guard security password* window opens, enter the Guard security password.

   You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

   In the Guard security settings, you can define a default value for the time range.

   Click on **OK**.

Also see:

Saving selected documents in an encrypted format (p. 268)
Opening an encrypted document (p. 269)
encrypt files (p. 264)

11.4.2 Saving selected documents in an encrypted format

When having opened a text document, spreadsheet or a presentation, you can save this document in an encrypted format.

How to save the selected document in an encrypted format:

1. Open a document in the *Text*, *Spreadsheet* or *Presentation* app.
2. In the **File** tool bar, click on **Save in Drive**. Select **Save as (encrypted)**.

   The *Save as (encrypted)* window opens. Select a folder and a file name. Click on **OK**.
3. If the *Enter Guard security password* window opens, enter the Guard security password.

   You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

   In the Guard security settings, you can define a default value for the time range.

   Click on **OK**.

Also see:

Creating new encrypted documents (p. 268)
Opening an encrypted document (p. 269)
encrypt files (p. 264)

11.4.3 Opening an encrypted document

You can open an encrypted document to do the following:

- read or edit the document
- download the document in decrypted format
- print the document as a PDF in decrypted format

The document remains encrypted on the server.

How to open an encrypted document:

1. Open a document in the *Text*, *Spreadsheet* or *Presentation* app.
2. If the *Enter Guard security password* window opens, enter the Guard security password.

   You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

   In the Guard security settings, you can define a default value for the time range.

   Click on **OK**.
3. You can use the following functions:
   - Edit the document. Information can be found in the *Documents* user guide.
   - To download the document in a decrypted format, click the **Download** icon next to the reminder.
   - To save the document as pdf in a decrypted format, click the **Print as PDF** icon next to the reminder.

Also see:

Creating new encrypted documents (p. 268)
Saving selected documents in an encrypted format (p. 268)
encrypt files (p. 264)

11.5 Sign out Guard

You can sign out from Guard without closing the groupware. To open an encrypted E-Mail or file after having signed out, you have to re-enter the Guard security password.
Note: This function is only available if you enable **Remember Password** when opening an encrypted E-Mail or file.

How to sign out from Guard:

1. Click the **System menu** icon on the right side of the menu bar.
2. Click on **Sign out Guard** in the menu.

11.6 GuardSettings

How to use the Guard settings:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select **Security** in the side bar. Click on **Guard**.

The following settings are available:

Defaults

- **Default to send encrypted when composing e-mail**
  Defines whether a new E-Mail is encrypted by default.
- **Default adding signature to outgoing e-mail messages**
  Defines whether a new E-Mail is encrypted by default.
- **Default to using PGP inline for new e-mail messages**
  Defines whether the PGP encryption is done inline by default. Only use those settings if the E-Mail client of a recipient does not support PGP. With PGP inline, the recipient can decrypt the message regardless. If you use this setting, you can not send E-Mail messages in HTML format.
- **Remember password default**
  Defines the time range default for Guard to remember the password. You can change this default when being asked for your Guard password.

Password management
Contains functions for changing or resetting the password

Also see:

Password management (p. 273)

Advanced

- **Advanced settings**
  Defines whether the *Keys* section is displayed. Those functions allow to manage your own or public keys. If **Show advanced settings** is enabled, you can use additional options when sending encrypted E-Mail messages.

Also see:

Sending encrypted E-Mail messages (p. 262)

Keys
Usually, the key management functions are not required for sending or receiving encrypted messages. Those functions can be useful under the following circumstances:

- You want to use your Guard PGP keys in other E-Mail clients, e.g. in local E-Mail clients.
- You have PGP keys from other PGP applications. You want to use those keys in Guard.
- You have an external partner's public key. In order to send encrypted messages to this external partner or verify received signed messages without having to access a key server, you want to import the partner's public key into Guard.
- You want to provide your public key to an external partner in order to allow the external partner to send encrypted messages to you without the need to access a key server.

The following options are available:

- **Download my public key button**
  Saves your public key locally.
- **Your keys button**
  Opens the *Your Keys* window for managing your own keys.
- **Public keys of recipients button**
  Opens the *Your Keys* window for managing public keys.

11.6.1 Password management

The following options are available:

- change the Guard security password
- When having lost your Guard security password, you can request a temporary Guard security password by resetting the Guard security password.
- Defining an E-Mail address for resetting the password.
- To be able to reset your password, if needed, your password has to be saved on the server in an encrypted version. If you do not want your password to be saved on the server, you can completely remove the function for resetting the password.

Note: Depending on the configuration, some of those functions might not be available.

How to change the Guard password:

1. Click on **Reset Password** on the **Guard** page. The *Change password* window opens.
2. In the **Enter current Guard security password** field, enter the password that you have used so far for encrypting your data.

   In the **Enter new Guard security password** field, enter the password that you want to use for encrypting your data from now on.

   Confirm the password in the **Verify new Guard security password** field by entering it again.
3. Click on **Change**.

How to reset the Guard password:

1. Click on **Reset Password** on the **Guard** page. The *Reset password* window opens.

   Click on **Reset**.
2. A new password will be sent to your secondary E-Mail address.

   If not having entered a secondary E-Mail address, the new password will be sent to your primary E-Mail address.

   This new password is now your current Guard security password. You should immediately change this password.

How to change your secondary E-Mail address for resetting the password:

1. Click on **Set email address for reset** on the **Guard** page. The *Secondary E-mail Address* window opens.
2. In the **Enter current Guard security password** field, enter the password that you have used so far for encrypting your data.

   In the **Enter new secondary e-mail** field, enter the E-Mail address that is used for receiving a temporary password for resetting your Guard security password.

   Re-enter the E-Mail address in **Verify e-mail address**.

   Click on **Change E-mail address**.

How to remove the function for resetting the password:

Warning: If you remove the function for resetting the password, you can no longer reset your password. if you forget your password afterwards, there will be no possibility to decrypt your encrypted E-Mail messages or files.

1. Enable **Show advanced settings** on the **Guard security settings** page.

   Click on **Delete password recovery**. The *Delete Recovery* window opens.
2. Click the **Delete** button.

Also see:

Managing your own keys (p. 275)
Managing public keys (p. 277)

11.6.2 Managing your own keys

The following options are available:

- display your own keys, display details
  Make a key the current one. Others can use this key to encrypt data.
- add new keys
- add user IDs
  When adding additional user IDs to a key, you can use the key for multiple E-Mail accounts.
- download keys
- delete keys

How to display your own keys or make a key the current one:

1. Enable the **Show Advanced Settings** checkbox below *Advanced*.
   Click on **Your keys** below *Keys*. The *Your Keys* window opens.
   - Your existing keys are displayed. Each key consists of a master key and a sub-key.
     - Among other things, the master key is used for signing your E-Mail messages.
     - The sub-key is used for encrypting and decrypting E-Mail messages and files.
   - Depending on the requirement, Guard automatically uses the master key or the sub-key.
2. If your key list contains more than one key, you can define the current key. To do so, enable the **Current** checkbox next to the key. From now on, the current key will be used for encryption.
3. To display details for a key, click the **Details** icon next to a key. The *Key Details* window opens. To view the key's signatures, click on **Signatures**.

How to add a new key in the *Your Keys* window:

1. Click the **Add** icon next to the reminder. The *Adding Keys* window opens.
2. The following options are available:
   - To add a private key, click on **Upload Private Key**. Select a file containing a private key. The *Upload Private Keys* window opens.
     To upload the new key, enter your Guard security password. Enter a new password for the new key.
   - To add a public key, click on **Upload Public Key Only**. Select a file containing a public key.
   - To create a new key pair, click on **Create New Keys**. The *Create GuardSecurity Keys* window opens. Enter a password for the new key. Confirm the password.
     The new key consists of a master key and a corresponding sub-key.

   The new key will be entered on top of your key list. The new key becomes the current key.

How to add an additional user ID in the *Your Keys* window:

1. Click the **Edit** icon next to a key. The *Add User ID* window opens.
2. Enter a name for the user ID. Enter the E-Mail address that you want to use for this key.
   Enter your password for this key.
   Click on **OK**.

How to download a key in the *Your Keys* window:

1. Click the **Download** icon next to a key.
2. Define whether to download your private key only, your public key only or both keys.
   Caution: Your private key will be downloaded in encrypted form. You should not download your private key to a publicly accessible system, though.

How to delete a key in the *Your Keys* window:

Warning: If you delete a private key, you can no longer decrypt objects that have been encrypted with this key. If you are unsure, you should not delete the key but revoke it. A revoked key can no longer be used for encryption. But you can still decrypt objects that have been encrypted with this key.

1. Click the **Delete** icon next to a key. The *Delete Private Key* window opens.
2. The following options are available:
   - To revoke a private key, click on **Revoke**.
     if you revoke a key, it will no longer be used. But you can still decrypt objects that have been encrypted with this key. For this reason, revoking a key is better than deleting it.
     Enter the password for the private key. If required, select a reason for revoking the key.
     Click on **Revoke**.
   - In order to delete a private key, click on **Delete**.
     Warning: If you delete a private key, you can no longer decrypt objects that have been encrypted with this key.
     Enter the password for the private key.
     Click the **Delete** button.

   When deleting a master key, the corresponding sub-key will be deleted too.

Also see:

Managing public keys (p. 277)
Password management (p. 273)

11.6.3 Managing public keys

The following options are available:

- display public keys
- upload public keys
- delete your own public key

How to show public keys:

1. Enable the **Show advanced settings** checkbox below *Advanced*.

   Click on **Public keys of recipients** below *Keys*. The *Public Keys* window opens.

   The public keys shared by you or other users are displayed. If a user's public key is displayed in this list, you can send an encrypted E-Mail to this user and verify signed E-Mail messages that have been sent to you by this user.

2. To display details for a key, click the **Details** icon next to a key. The *Public Keys Detail* window opens.

   You can share public keys by enabling **Share key**. Other users can view and download your shared keys. Public keys are only available for groupware users.

How to upload a recipient's public key in the *Public Keys* window:

Click the **Add** icon next to the reminder. Select a file containing a public key.

How to delete a public key in the *Public Keys* window:

Click the **Delete** icon next to a public key.

Confirm that you want to delete the public key.

Also see:

Managing your own keys (p. 275)
Password management (p. 273)

12 Questions and Answers

General questions

Where can I find my personal data and settings?

You can customise the following data and settings:

- Learn how to change your personal data.
- Learn how to customise the basic settings.
- Learn how to set up additional E-Mail accounts.

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.

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

If there are new E-Mail messages or appointment notifications, the *Unread Badge* icon 1 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 notification area.

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

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

Questions about Email Messages and contacts

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

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

- Enter all recipients in the input fields **To**, **Cc** or **Bcc**. Use the auto-complete function to more easily enter the addresses. This FAQ list provides an explanation of the differences between the input fields.
- If you regularly send E-Mail messages to the same group of people, create a distribution list in the *Address Book* app and add the E-Mail addresses to the distribution list. Information can be found in Creating Distribution Lists (page 116).

What is the purpose of the input fields Cc and Bcc?

Recipients entered in the input fields **To** or **Cc** can be viewed by all other recipients entered in the input fields **To** or **Cc**. Recipients entered in the input field **Bcc** cannot be viewed by other recipients entered in the input fields **To**, **Cc** or **Bcc**. 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 **Cc**
- 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 **Bcc**.

I regularly send email messages with identical or similar content. How can I speed up this process?

Make use of the ability to save email messages as drafts. Information can be found in Working with email drafts (Seite 82).

Can I e.g.: access email messages sent to my Google Mail account?

For many E-Mail service providers you can set up external E-Mail accounts, e.g. for Google Mail. You only need your account data for the respective provider. As soon as you set up the external E-Mail account you have access to the E-Mail messages from within the folder view. Information can be found in Adding E-Mail Accounts (Seite 98).

How can I automatically forward email messages to my replacement?

Enable the function *Auto Forward* in the settings. Information can be found in Automatically forwarding email messages (Seite 74).

How to keep the overview over my E-Mail accounts' inboxes?

Use Unified Mail to display the inboxes of multiple email accounts in a central folder. Information can be found in Using Unified Mail (Seite 88).

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 hide my appointments' or tasks' subject in shared folders?

When creating appointments or tasks in public or shared folders, enable the **Private** checkbox. Other persons can see the appointment or task but not the subject or the description.

How can I create a task from an email?

Use the *Reminder* function in the display area of the *E-Mail* app. Information can be found in Creating E-Mail reminders (Seite 83).

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

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

How do I use the calendar or tasks recurrence settings?

Example 1: An appointment or a task should take place every second day. It should start on 04-01-2017. and should take place five times.

- Repeat **Daily**
- Interval **2** days
- Ends **After a number of occurrences**
- Occurrences **5**

Example 2: An appointment or a task should take place each Tuesday and Friday. It should start on 10-01-2017.

- Repeat **Weekly**
- Weekday **Tue**, **Fr**
- Interval **1** week(s)
- Ends **Never**

Example 3: An appointment or a task should take place every second Wednesday. It should start on 11-01-2017. The last appointment should be on 08-03-2017.

- Repeat **Weekly**
- Weekday **Wed**
- Interval **2** week(s)
- Ends **On specific date**
- Ends on **08-03-2017**

Example 4: An appointment or a task should take place on the first Monday of a month. It should start on 06-02-2017. The event should take place twelve times.

- Repeat **Monthly**
- Repeat by **Date**
- Interval **1** month(s)
- Ends **After a number of occurrences**
- Occurrences **12**

Example 5: An appointment or a task should take place each year on the last Friday in November. It should start on 24-11-2017.

- Repeat **Yearly**
- Repeat by **Week day**
- Ends **Never**

Also see:

The appointment editing window: (p. 138)
The task editing window (p. 179)

How to find free time periods when creating appointments?

Click on **Find a free time** when creating an appointment or click on **Scheduling** in the toolbar. Information can be found in Using the scheduling view (page 151).

Questions about data organisation and team work

How can I make certain contacts available to my external partners?

You can also give external partners access to your groupware address books' contacts or to your social networks' contacts. To do this proceed as follows:

1. Add contacts from your social networks to an address book.
2. Create a new contacts folder. Copy all contacts that you want to share from your address books to this contact's folder.
3. Share this contact folder. Information can be found in Sharing (page 235).

How can I share specific documents with my external partners?

You can share the contents of documents folders with external partners. To do this proceed as follows:

1. In the *Drive* app, you can collect the documents in a separate folder.
2. Share this folder. Information can be found in Sharing (page 235) .

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