



OX App Suite

User Guide

OX App Suite: User Guide

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1 About this documentation

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

- Which [target group](#) does the documentation address?
- Which [contents](#) does the documentation include?
- Which [design elements](#) are used?
- What [terminology](#) is used in the documentation?
- What [other help topics](#) are available?

1.1 Who is the target group for this documentation?

This documentation is addressed to the end user.

1.2 Which contents are included in the documentation?

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

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

1.3 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 new email**.

Label

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

Example:

The *Compose new email* page is displayed.

Key labels

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

Example:

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

Links

Links in the text appear in [blue](#).

Example:

Details can be found in [5.4: Sending email messages \(page 50\)](#).

Explanatory Text

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

Example:

You have the following options:

- Send a new email.
- Reply to an email.
- Forward an email.

Step by step instructions

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

Example:

How to answer an email:

1. Select an email in the side bar.
2. Click on **Reply** in the display area next to the email header.
3. Enter the email text.
4. Click on **Send** in the command bar.

Result: The email is sent

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 email window.

Malfunction note

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

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

Example:

Note: In order to add a signature, you need to have created one in the email 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 email messages are irrevocably lost. Prior to permanently deleting email messages, make sure you no longer need the email messages.

1.4 Terminology

This documentation uses the following terms.

OX App Suite	The software described in this documentation. <i>Groupware</i> is used as a synonym in the documentation.
Application	An application is a component that provides certain functions. Example: With the <i>E-Mail</i> application you can send, receive and organise email messages.
Objects	Objects are created and organised by the user. Examples: email messages, contacts, appointments, tasks, documents.
Function	An action performed by the user. Example: sending an email, deleting an appointment.
User interface	This refers to the groupware user interface. The user interface consists of individual elements.
Elements	Elements of the user interface. Example: windows, labels, buttons.
System windows	Dialogue windows that offer certain operating system functions. Examples of functions are: printing, opening an email attachment, and selecting a file. Depending on the operating system on your local machine the look of the system windows may vary.
User	A person working with the groupware. Each user has a username and a password. All groupware users make up the internal users group.
Global address book	Contains the contact data for all internal users. The users can edit their own personal data in the global address book.
Participant	A user invited to an appointment or task.
External participant	A person that is not a user but that participates in an appointment or task.
Internal email account	Your groupware email account. You will automatically get this account. You can not delete this account.
External email account	An email account that you have set up with another provider e.g.: a Google email account. You can access external email accounts from within the groupware.
Email thread	An email thread is an email conversation and a running list of all the subsequent replies pertaining to the original email. All email messages in an email thread have the same subject. The current email corresponds to the last reply.

1.5 **Additional Help**

The contents of this documentation are also available in the online help.

2 Getting Started with the Groupware

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

- Which [functions](#) does the groupware provide?
- Which [system requirements](#) must be met by a local machine?
- 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 like Twitter, Facebook or online newspapers.

- Get an overview of current appointments and new E-Mail messages. Launch the *Calendar* or *E-Mail* app by clicking on an appointment or an E-Mail.
- Read current messages from your favourite messaging source.
- Follow news from your social networks.
- Launch applications like *E-Mail* , *Address Book* or *Calendar* apps with a mouse click.

[Learn more \[39\]](#).

E-Mail

Send, receive and organise your email messages.

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

[Learn more \[45\]](#).

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 contact folders to organise your contacts. Co-operate with your team by sharing selected contact folders.
- Use publish and subscribe to subscribe to your social network contacts. 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 contact folders with publish and subscribe.

[Learn more \[69\]](#).

Calendar

Keep an overview of your private and business appointments.

- Use individual or recurring appointments to schedule meetings and activities.
- Use calendar folders 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 iCal functions ensure automated invitation management.

[Learn more \[81\]](#).

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 \[99\]](#).

Documents

Create, edit, and print formatted documents in common Office file formats.

- Use formatted text documents for your correspondence. Use tables and images within the documents.
- Make use of the other apps to organise your documents, to send them by email or share them with users or external partners.

[Learn more \[127\]](#).

Editor

Create and edit simple text files.

- This function helps you create notes quickly and easily.
- Use the other apps to organise your text files, to send them by E-Mail or to share them with users and external partners.

[Learn more \[135\]](#).

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.
- Send individual files as email attachments or links.
- Provide information to external partners by sharing document folders with publish and subscribe.

[Learn more \[111\]](#).

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 tree helps to manage folders and permissions.

- Use personal folders for sorting your email 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.
- The social functions in the groupware also make use of folders for collecting or sharing information with external partners.

[Learn more \[139\]](#).

2.2 System Requirements

In order to successfully work with the groupware, your local machine must meet the following system requirements.

Resolution/screen size

The minimum display resolution is 1024 x 768.

Browser

- Google Chrome, latest version

Browser settings

- Cookies must be enabled
- JavaScript must be enabled
- Pop-up windows must be allowed

2.3 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

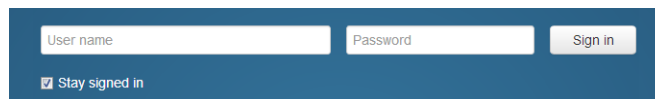
Information on these techniques can be found in your operating system documentation.

2.4 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.



The image shows a login form with a dark blue background. It contains two input fields: 'User name' and 'Password'. To the right of the 'Password' field is a 'Sign in' button. Below the input fields is a checkbox labeled 'Stay signed in' which is checked.


3. Enter your username and your password. Note that they are case-sensitive.
4. To save your credentials locally, enable **Stay signed in**.
Warning: Only use this option if this machine is used solely by you. When signing in to a public machine do not use this option.
5. Click on **Sign in**.
Note: If you enter the wrong username or password an error message is displayed. Enter the correct information.

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

- Selecting applications, e.g.: Portal, Email, Address book
 - Additional functions: organising applications, refreshing data, opening the help section, signing out
- At the bottom of the screen several useful bits of information are displayed.

- Your username
- Current date, current time

How to sign out:

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

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

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

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

3 First Steps

What you should do initially.

- Get familiar with the [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](#).
- In order to access social network contacts (e.g.: Facebook contacts) you need to [set up accounts for social networks](#).

3.1 The User Interface

The user interface includes the following components:




- A [menu bar](#) on the top.
- A [tool bar](#) to the left.
- The [Folder tree](#) can be found next to the tool bar.
- The remaining space is used for the [side bar](#) and the [display area](#).
- Depending on the action executed, the [pop-up window](#) or the [notification area](#) will overlap the display area.
- Text that can be clicked is displayed in blue.
- You can also use the [keyboard \[32\]](#) to access the user interface functions.

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

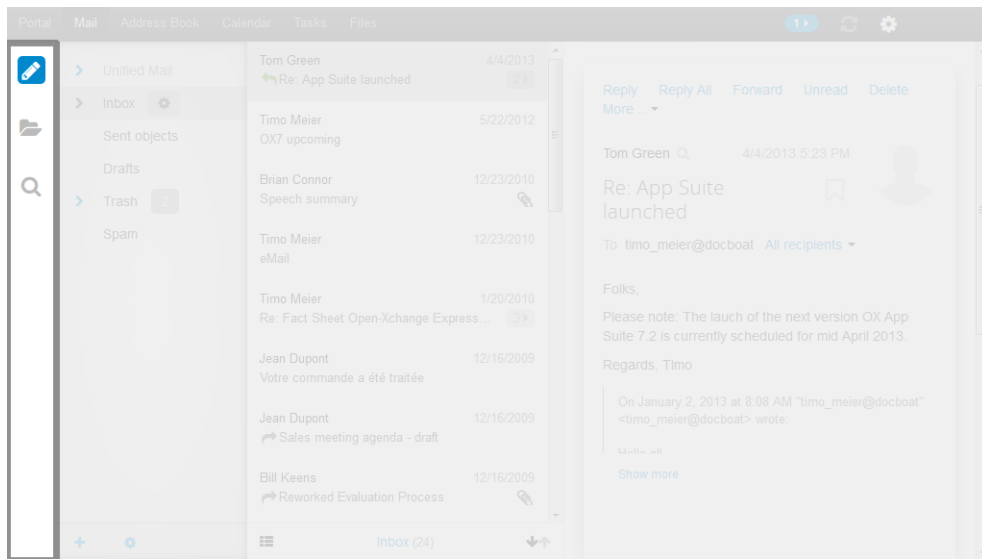
Menu bar






Contains the following icons and buttons:

- Buttons for launching applications like *E-Mail* or *Calendar*
- Depending on the action, additional buttons might be displayed e.g.,: if composing a new email or editing an appointment.
- **Unread Badge** icon . The icon notifies you of the number of new objects e.g.,: unread email messages or scheduled appointment invitations. Clicking opens the [notification area](#).
- **Refresh** icon . Reloads objects from the server. Irrespective of this function, objects are refreshed in regular intervals.
- **System menu** icon . Opens a menu with the following entries:
 - *Settings*. Opens a page that allows customising settings.
 - *Help*. Opens the online help.
 - *Full screen*. Switches to full screen mode or back to windowed mode.
 - *Sign out*. Signs you out from the groupware.

Tool bar

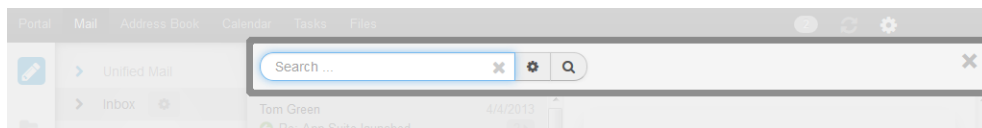


The tool bar is on the left. It contains the following icons:

- **New** icon . Creates new objects like a new email or a new contact.
- **Toggle Folder** icon . Opens or closes the **folder tree**.
- **Toggle Search** icon . Opens or closes the **search** input field.

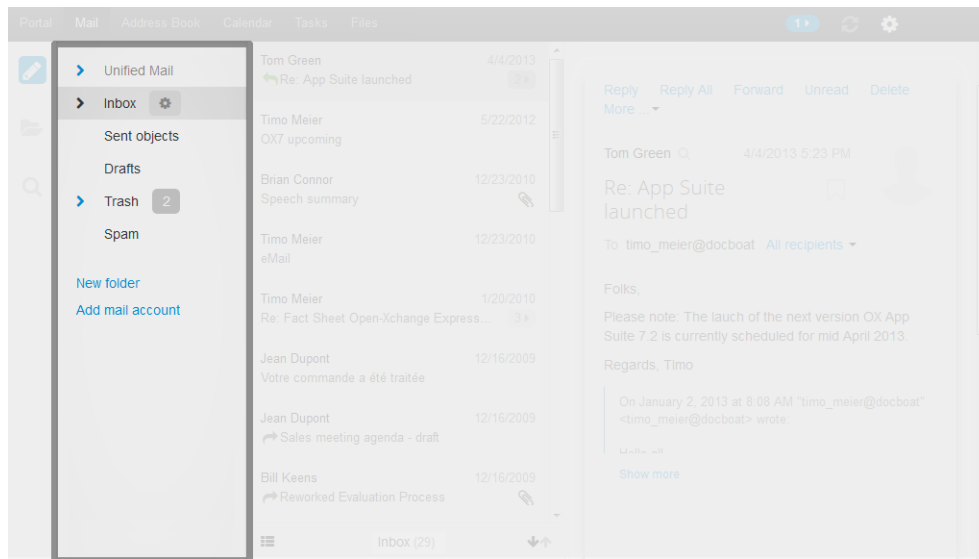
Depending on the application, additional icons may be available e.g.: an icon for selecting a view for the **display area**.

Toggle Search input field




If you click the **Toggle Search** icon in the tool bar, the **Toggle Search** is opened or closed. When entering a search term, the **side bar** only displays elements matching the search term. To reset the search result, click the **Toggle Search** icon in the tool bar.

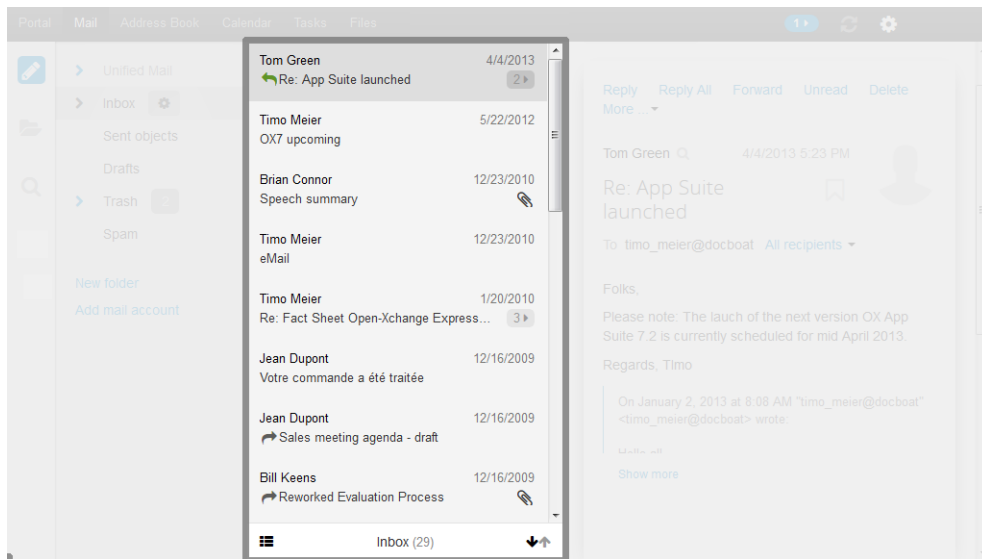
Folder tree



When clicking the **Toggle Folder** icon in the tool bar, the folder tree is opened or closed. It shows the following contents:

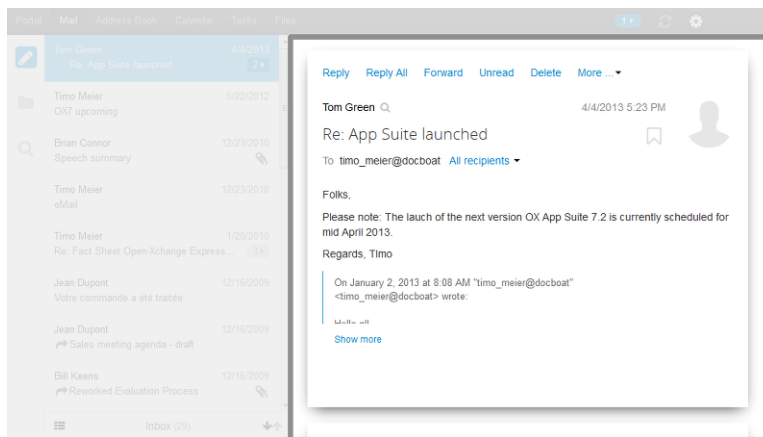
- an alphabetically sorted list of application specific folders
- depending on the application, sections for personal, public and shared folders
Note: Depending on the groupware configuration, those sections might not be displayed if there are no public or shared folders.
- The **Folder-specific actions** icon  next to the selected folder. It contains functions for [organising folders](#). Depending on the folder, further functions might be available.
Tip: You can also access the folder-specific actions by right-clicking on a folder.

Side bar



Depending on the application and the view selected, the side bar displays a list of the objects in the current folder. Depending on the application, additional buttons are shown below the list e.g., for sorting objects.

Display area

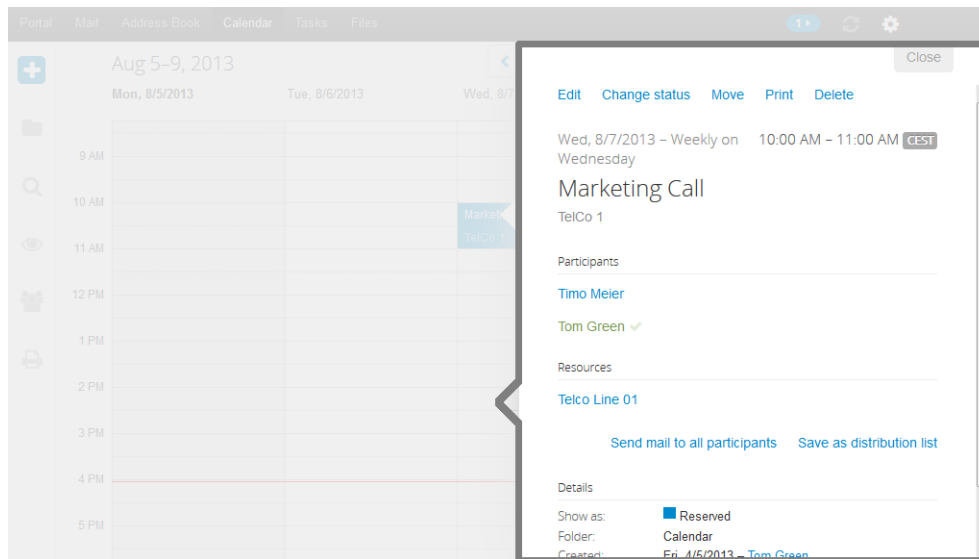


Depending on the application and the view selected, the display area shows the content of the object you selected in the side bar or the content of the folder selected. If you selected an E-Mail, the display area shows the following elements:

- application specific buttons for replying to the E-Mail, forwarding it or for using other functions
- the header and the content of the E-Mail

Clicking on an object in the display area opens a **pop-up** window. In the *Drive* app, a **function bar** is displayed in the upper part of the display area.

Pop-up

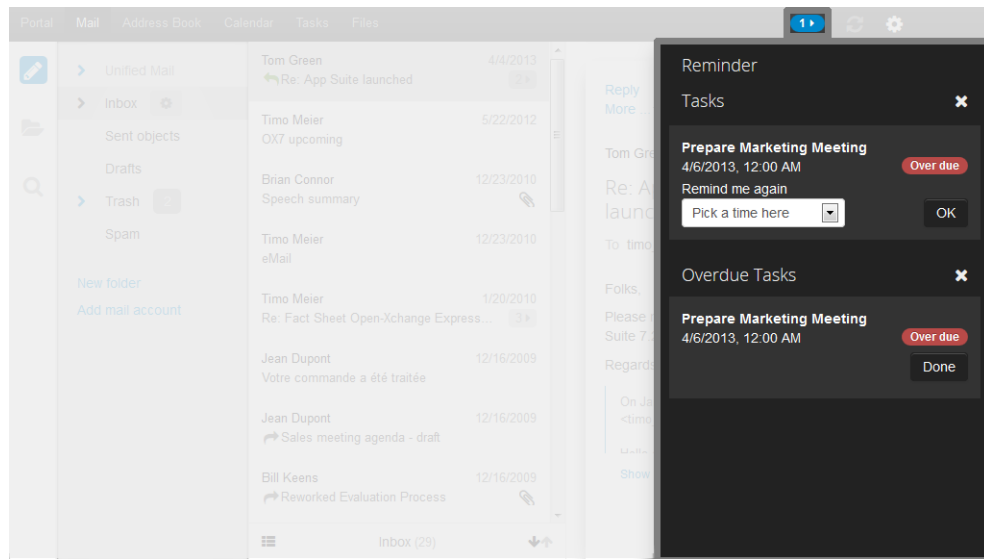


Displays detailed information about an object shown in the [display area](#). In order to open the pop-up, click on a groupware object in the display area. If you read an email in the display area and click on the name of the sender, the following elements are displayed in the pop-up:

- 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 email conversation with the sender

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


Notification Area



Displays information about the following objects:

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

In order to open the notification area, click the **Unread badge** icon  on the right side of the **menu bar**. The following actions are possible:

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

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

3.2 Keyboard Input

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

- To toggle between the menu bar, the folder tree, the side bar, and the display area, use the key combination [Ctrl]+[F6].
- To move the cursor within input fields, use the following keys: cursor keys, [Home], [End].
- To browse the folder tree or the side bar, use the following keys: [Page up], [Page down].
- To open or close a folder in the folder tree, use the [Space bar] or [Enter].
- To select elements in the folder tree, in the side bar or in the display area, use the cursor keys.
- To select a function, an input field or a checkbox, use the [Tab] key, [Shift]+[Tab]. 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 check boxes, use the cursor keys.
- To close a pop-up or cancel a dialog window, press [Esc].

Instructions that show how to use the keyboard control:

- How to use the keyboard to [send](#) a new email
- How to use the keyboard to [reply](#) to an email

How to use the keyboard to send a new email:


1. If the *Email* app is not launched, do the following:
 - Press [Ctrl]+[F6] to highlight the menu bar.
 - Press [Tab] to highlight *email* in the menu bar.
 - Press [Enter]. The *Email* app will be launched.
2. Repeatedly press [Tab] until the **New** icon  is highlighted. Press [Enter]. The *Compose new mail* page opens. The input field *To:* is enabled.
3. Enter the recipient's email address. Press [Enter].
4. Press [Tab]. The input field *Subject* is enabled. Enter the subject.
5. Press [Tab]. The input field for the email text is enabled. Enter the email text.
6. In order to send the email, press [Tab]. The **Send** button is highlighted. Press [Enter]. The email will be sent.
7. To add attachments, repeatedly press [Tab] until the **Attachment** function is highlighted. Press [Enter]. The control elements for adding files are displayed.
Press [Enter]. A dialog 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 dialog.
Repeatedly press [Tab] until the **Send** button is highlighted. Press [Enter]. The email will be 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] to highlight the menu bar.
 - Press [Tab] to highlight *email* in the menu bar.
 - Press [Enter]. The *Email* app will be launched.
2. Repeatedly press [Ctrl]+[F6], until a folder in the folder tree is highlighted. Use the cursor keys to select the desired folder. To view or hide a subfolder, press [Enter].
3. If the desired folder is highlighted, repeatedly press [Tab], until an email is highlighted in the side bar.
4. Use the cursor keys to select the desired email.
5. To reply to the email, repeatedly press [Tab], until the **Reply** function is highlighted. Press [Enter] to activate the function.

3.3 Customising the Basic Settings

How to customise the basic settings:

1. Click the **System menu** icon  in the menu bar. Click the **Settings** menu item.
2. Click on **Basic settings** in the side bar.
3. Change the [Settings \[34\]](#).

The following settings are available.

- [Language](#)
- [Time zone](#)
- [Refresh interval](#)
- [Theme](#)
- [Default application after login?](#)
- [Auto Logout](#)
- [Automatic opening of notification area](#)
- [Change password](#)

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

Language

Defines the user interface language.

Time zone

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

Refresh interval

Defines the interval for retrieving new objects from the server.

Theme

Defines the colour scheme for the user interface.

Default application after login?

Defines the application that is displayed after login.

Auto Logout

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

Automatic opening of notification area


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

Change password

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

3.4 Changing Personal Contact Data

How to change your personal contact data:

1. Click the **System menu** icon  on the right side of the menu bar. In the menu, click on **Settings**.
2. In the side bar click on **Address book**. Click on **My contact data**.
3. Change the settings. Click on **Save**.

Tip: You can also change your personal contact data by [using](#) the *User data* portal square in the *Portal* application

3.5 Changing the password

How to change your password:

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


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

Note: This square might not be displayed. In this case you can [add](#) the square.

Tip: You can also change your password in the [Basic settings](#).

3.6 Setting up Accounts for Social Networks

How to set up an account for accessing social networks:

1. Click the **System menu** icon  on the right side of the menu bar. Click on **Settings** in the menu.
2. Click on **Mail and Social Accounts** in the sidebar.
3. Click on **Add** in the display area. Select a social network from the menu e.g.: **Facebook**. You will be directed to the social network page where you will be asked for your credentials.
4. Enter your credentials for the social network account. In order to finish the process, click on the respective button.

4 Portal

Learn how to work with the *Portal* application.

- the [components](#)
- [customise](#) the contents

How to launch the *Portal* app:

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

4.1 Components

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

Signed in as

Displays the username that you used for signing in.

Add widget button

Clicking on this opens a menu that allows [adding \[42\]](#) new squares.

Customise this page button

Clicking on this displays a page that allows [customising \[42\]](#) the Portal .

Appointments square

Displays your current appointments. You can do the following:

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

Inbox square

Displays new email messages. You can do the following:

- If clicking on an email, a [pop-up](#) opens. The pop-up displays the email'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.
- To compose a new email, click on the **Compose new email** list item.

Tasks square

Shows unfinished tasks. You can do the following:

- If clicking on a task, a [pop-up](#) opens. The pop-up shows the appointment data.
- In order to close a pop-up, click on **Close** in the upper right corner.

Recently changed files square

Displays new or changed files.

Note: This square might not be displayed. If this is the case you can [add](#) the square.

User settings square

Includes links for the following functions:

- Changing your personal contact data
- Changing your password

Note: This square might not be displayed. If this is the case you can [add](#) the square.

Quota square

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

Note: This square might not be displayed. If this is the case you can [add](#) the square.

Squares with *News widgets*

Display current messages from different message sources:

- Current messages from social networks like Facebook or Twitter
- 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 square](#) to the Portal . The settings or a message source for an RSS feed can be [changed](#) later.

4.2 Customising the Portal

The following options exist:

- [Changing the portal square order](#)
- [Removing Portal squares](#)
- [Adding portal squares](#)
- [Changing a portal square's settings](#)

Note: Depending on your groupware's configuration, some portal squares might not be changeable.

4.2.1 Changing the portal square order

You can define the order of the squares.

How to change the portal square order:

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

4.2.2 Removing Portal squares

You can remove a square from the portal by closing the square.

How to remove a Portal square:

Click the **Close** icon  in the square. Use the [Portal settings](#) to display the Portal square again.

4.2.3 Adding portal squares

You can extend the existing squares by adding new ones.

How to add new portal squares:


1. Click on **Add widget** in the *Portal* App on the upper right side.
2. Some squares require additional data. Enter the required values. Click on **Save**.

Tip: In the *Drive* app you can [add a file as portal square](#).

Tip: In the *E-Mail* app you can [add an email as portal square](#).


4.2.4 Changing a portal square's settings

How to use the portal squares settings:

1. Click the **System menu** icon  in the menu bar. Click on **Settings** in the menu.
2. Click on **Portal** in the side bar.
3. Change the [Settings \[42\]](#).

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

The following settings are available.

- **Edit** button
- **Colour** button
- **Disable** button
- **Delete** icon 

Edit button

Allows editing a square's settings, e.g.: the URL or description.

Note: This button is only available for certain squares.

Colour button


Defines the colour used for displaying a portal square's name.

Disable button

Removes a square from the portal. To display the square again, click on the **Enable** button.

Delete icon

Warning: If you delete a square, all settings for this square will be lost.

This icon  deletes a square from the portal and from the list of squares on the settings page.

5 E-Mail

Learn how to use the *E-Mail* application.

- the *E-Mail* components
- [search and view](#) email messages
- [send](#) email messages
- [manage](#) email messages
- [share](#) E-Mail messages with other *users*
- access your [external email accounts](#) that you have set up with other providers
- use the *E-Mail* [settings](#)

How to start the *E-Mail* app:




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

5.1 The *E-Mail* Components


An introduction to the user interface can be found in [The User Interface](#).


Tool bar

Contains the following icons:


- **New** icon . Creates a [new email](#) [50].
- **Toggle Folder** icon . Opens or closes the [folder tree](#).
- **Toggle Search** icon . Opens an input field for [searching](#) [140] for email messages with a certain sender or subject.



Folder tree

Displays the email folders. Allows [navigation within the folder structure](#) [141]. In order to open the folder tree, click on the **Toggle Folder** icon  in the tool bar. The following functions are available:


- If clicking on a folder its email messages are displayed.
- The **Folder-specific actions** icon  next to the selected folder offers functions for [organising data](#) [139] and app specific folder functions.
- Buttons below the folder tree offer functions for [creating folders](#) [142] and for [adding email accounts](#) [64].

Side bar

Displays a list of the email messages in the current folder. The view shows the sender, subject, date or time of receipt. Unread email messages are marked with the *Unread* icon . If available, additional icons are shown: attachment icon, coloured label, number of email messages in the thread. The following functions are available:




- If clicking on an email, its content is displayed in the [display area](#).
- If clicking the **Thread** icon , all previous email messages from the [email thread](#) are displayed or hidden below the current email. If clicking on a previous email, its content is displayed in the display area.
- If clicking the **Select** icon  below the list, a checkbox is displayed next to each email. You can select multiple email messages to [edit them at once](#) [58].

The **Select all** checkbox on the left side of the **Select** icon allows selecting all email messages in a folder.

- The text below the list contains the name of the selected folder. The number corresponds to the number of objects in the selected folder.
- If clicking the **Sort** icon  below the list a menu opens that helps you sort your email messages.

Display area

Displays the email's content and the functions available:





- Buttons: **Reply**, **Reply All** [51], **Forward** [52], **Delete** [57] **Unread**, **Mark read** [55].
If clicking on **More**, a menu opens with the following functions: **Move** [54], **Copy** [54], **View source** [55], **Reminder** [56], **Add to Portal** [56], **Save as file** [56].
If the email is part of an email thread, the additional button **Entire thread** is shown in the display area on top. This button allows you to activate [functions for all of the email messages in the thread](#) [59].
- Name of the email sender. If clicking on a name a [pop-up](#) opens. It includes the following components:
 - The person's contact data.
 - If the person's contact data are saved, the location of the data is displayed.
 - If you exchanged email messages with this person, they are displayed below *Recent conversations*.
 - If you share appointments with this person, they are displayed below *Shared appointments*.
If clicking on an appointment or an email, an additional pop-up opens.
- If clicking the **Search** icon  next to the sender's name, a search for email messages from this sender is launched.
- Date of receipt
- Subject
- **Label** [55] button . Opens a menu allowing you to assign a coloured label to the email.
- If the email was sent to several recipients, the following is displayed:
 - All other recipients. If clicking on a name, a [pop-up](#) opens.
 - **All recipients** icon . If it is clicked on, the menu entries **Send new email** [50], **Save as distribution list** [62], and **Invite to appointment** [62] are displayed.
- If the email contains attachments, the names of the [email attachments](#) [49] are displayed.
- email text. Quotes from previous email messages are introduced with a vertical line. If clicking on **Show more**, the complete quote is displayed.

In an email thread, the current response is displayed on top and the original email at the bottom.

5.2 Displaying email messages

By default, the inbox content is displayed. Other email folders can be opened from within the folder tree.

How to display an email:

1. **Open** an email folder in the folder tree.
2. In order to quickly find a particular email, use one of the following methods:
 - To find email messages by entering a search term, use the [search function](#).
 - To sort the email list, click the **Sort** icon  below the side bar. Select a sort criteria from the menu.
 - To only display unread email messages in the list, click the **Sort** icon  below the side bar. Enable **Unread only** in the menu.
3. Click an email in the side bar. The content of the email will be displayed in the display area. If the email contains an email thread, the current response will be displayed on top with the original email at the bottom.
4. If the email belongs to an email thread, you can use the following functions:
 - To display all previous email messages from the email thread in the side bar, click the **Thread** icon .
 - To display the content of a previous email, click on the previous email in the side bar.
 - To display the complete content of the email thread, click on the current email in the side bar.
 - To hide the previous email messages in the side bar, click the **Thread** icon again .
5. If the email contains quotes from a previous email, you can use the following function:
 - To display the complete quote, click on the vertical line to the left side of the quote or on **Show more**.
6. In order to display another email, do one of the following:
 - Click on another email in the side bar.
 - Use the cursor keys to browse the list.

5.3 Viewing or Saving email Attachments

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

- displaying a preview of the attachment
- starting a slideshow if multiple pictures exist as attachments
- opening the attachment in a new tab
- downloading the attachment
- saving the attachment to [Drive \[111\]](#)

Note: Depending on the attachment's file format, some functions might not be available.

How to use the email attachment functions:

1. In the side bar, click on an email with an attachment.
2. Click on an attachment's name in the overview window. A menu with several functions opens.
3. Click on the function wanted. Depending on the function, further actions might be available.

Tip: If an email contains several attachments, an action can be executed for all attachments at once. To do this, click on **All attachments**. Then click on the function wanted.

5.4 Sending email messages

The following options are available:



- [Sending a new email](#)
- [Replying to email messages](#)
- [Forwarding email messages](#)
- [Automatically forwarding email messages](#)
- [Sending a vacation notice](#)

5.4.1 Sending a new email

In order to compose an email, you can do the following:

- [Compose an email](#) by entering the recipient, the subject and the email text
- [Use other functions](#): send copies, add attachments, append vCard, set importance

How to send a new email:

1. Click the **New** icon  in the tool bar.
2. Enter the recipient's email address in the side bar's *To* field. Press Enter.
If there are several recipients, repeat the action. Alternatively, you can enter the name of a [distribution list](#) [74].
In order to delete a recipient, click the **Delete** icon .
Tip: While entering the email address, several matching suggestions are displayed. How to accept a suggestion:
 - a. Accept a suggestion by using the cursor keys or the mouse.
 - b. Press Enter.
3. Enter a subject.
4. Enter the email text.
In order to compose the email in text format, select **Text** below *Text format*.
In order to compose the email in HTML format, select **HTML**. A formatting bar will appear. How to format the text:
 - a. Select the text content.
 - b. Click an element in the formatting bar.If you use the HTML format, you can add images from the clipboard.
5. You can [use additional functions](#): send copies, select sender address, add attachments, add signature, add vCard, request delivery receipt or set priority
6. Click on **Send**.

Result: The email is sent.

How to use additional functions when sending email messages:


Prerequisite: The *Compose new email* page is selected.

1. If you want to send copies of the email to other recipients, do the following:
 - If the recipients are to see who gets a copy of the email, click on **Copy (CC) to**. Enter the email address of the copy's recipient.
 - If you want to prevent the recipients from seeing who gets a copy of the email, click on **Blind copy (BCC) to**. Enter the email address of the blind copy's recipient.

If there are several recipients, you can enter the name of a [distribution list \[74\]](#).

In order to hide the input fields, click on **Copy (CC) to** or on **Blind copy (BCC) to**. The addresses entered will be kept.
2. If you have set up [external email accounts \[64\]](#), you can use those addresses as sender addresses. To do so, proceed as follows:
 - Click on **Sender**.
 - Select an email address from the list.

In order to hide the list, click on **Sender**.

Note: Depending on the folder selected, a defined sender address will be preset.
3. If you want to add attachments to the E-Mail, click on **Attachments**. Click on **Add attachment**. Select one or more files.
 - In order to use the current version of a file from the *Drive* app as an attachment, click on **Files**. Open a folder in the *Add files* windows. Check the boxes of the files that you want to add as attachments. Click on **Add**.
 - In order to delete an attachment, click the **Delete** icon .
 - In order to hide the input fields, click on **Attachments**. The attachments added will be kept.

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

Note: Depending on the groupware configuration, attachments will not be sent when having reached a certain size limit. In this case the attachment is saved in a folder below your personal files folder. The email includes a link to the attachment.
4. If you have set up signatures, you can add a signature to the email text. To do so, proceed as follows:
 - Click on **Signatures**.
 - Select a signature from the list.

In order to hide the list, again click on **Signatures**.
5. In order to display additional options, click on **More** in the side bar. You can use the following options:
 - set the priority
 - attach your vCard
 - request a delivery receipt

In order to hide the options, click on **Options**. The settings will be kept.

5.4.2 Replying to email messages

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

- The sender of the email and additional recipients of the email are automatically entered as recipients of the reply email.
- The email subject is entered in the subject field of the reply email. The subject is preceded with the text "Re:".
- The email text is cited in the reply email. Each line is preceded with the character ">" to indicate that it is a quotation.

How to reply to an email:

1. Select an email in the side bar.
2. Click on **Reply** in the display area. To also reply to all other recipients click on **Reply All**.
3. Enter the email text. You can use [additional functions](#) e.g.:email attachments.
4. Click on **Send**.

Result: The email is sent.

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

5.4.3 Forwarding email messages

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

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

How to forward an email:

1. Select an email in the side bar.
2. In the display area click on **Forward**.
3. Select one or more recipients. Details can be found in [How to send a new email: \(page 50\)](#).
4. Enter the email text. You can use [additional functions](#) e.g.:email attachments.
5. Click on **Send**.


Result: The email is sent.

Tip: You can also forward [multiple email messages at once](#) or [all email messages in an email thread](#).

5.4.4 Automatically forwarding email messages

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

How to automatically forward email messages:


1. Click the **System menu** icon  on the right side of the menu bar. Click on **Settings** in the menu.
2. Click on **Auto Forward** in the side bar.
3. Enter the email address to which you want to forward the messages.
4. Enable **Enabled**.

5.4.5 Sending a vacation notice

A vacation notice informs the sender of an email that you do not have access to your email messages for a specific period of time. You can set the following:

- the subject and text of the vacation notice
- the time period when the vacation notice is to be sent

How to create and activate a vacation notice:

1. Click the **system menu** icon  on the right side of the menu bar. Click on **Settings** in the menu.
2. Click on **Vacation notice** in the side bar.
3. Enter a subject and a text for the vacation notice.
4. Specify an interval for sending a vacation notice if there are several email messages from the same sender.
5. Specify a time period when the vacation notice is to be sent. **Note:** Depending on your installation, this option might not be available due to various reasons. If this is the case contact your administrator or hosting provider.
6. Activate the vacation notice by enabling at least one address under *Enabled for the following addresses*.

Tip: In order to deactivate the vacation notice, disable the email address under *Enabled for the following addresses*.

Tip: The vacation notice is entered as [E-Mail filter \[60\]](#). You can also edit the vacation notice in the E-Mail filter settings.

5.5 Managing email messages

Some of the techniques for organising email messages requires having already set up your own email folders. Information about creating folders can be found in [Folders \(page 141\)](#).

The following options are available:

- [Moving email messages](#)
- [Copying email messages](#)
- [Marking email messages as read or unread](#)
- [Collecting addresses](#)
- [Categorising email messages with labels](#)
- [Showing the email source](#)
- [Enabling an email reminder](#)
- [Adding an email to the portal](#)
- [Saving email messages](#)
- [Importing email messages](#)
- [Printing email messages](#)
- [Working with email drafts](#)
- [Deleting email messages](#)
- [Cleaning up E-Mail folders](#)
- [Editing multiple email messages at once](#)
- [Editing all the email messages in an email thread](#)
- [Using email Filters](#)

5.5.1 Moving email messages

You can move an individual email or a complete email thread to another folder.

How to move an email:

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

1. Select an email in the side bar.
2. Click on **More** in the display area. Select **Move** from the menu.
3. Select a folder in the *Move* window. Click on the **Move** button.

Tip: You can also move [multiple email messages at once](#) or [all the email messages in an email thread](#).

Tip: In order to move email messages using drag and drop, select an email or [multiple email messages](#) in the side bar. Drag the selected email messages to a folder in the folder tree and drop them there.

5.5.2 Copying email messages

You can copy an individual email or a complete email thread to another folder.

How to copy an email:

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

1. Select an email in the side bar.
2. Click on **Copy** in the display area. Select **Copy** from the menu.
3. Select a folder in the *Copy* window. Click on **Copy**.

Tip: You can also copy [multiple email messages at once](#) or [all the email messages in an email thread](#).

5.5.3 Marking email messages as read or unread

Unread email messages will have an *Unread* icon ● in the side bar. In order to mark an email as read or unread, you can do the following:

- mark an individual email or a complete email thread as read or unread.
- mark all email messages in an email folder as unread


How to mark an email as unread:

1. Select a read email in the side bar.
2. Click on **Mark unread** in the display area.

In order to mark this email as read, click on **Mark read**.

Tip: You can also mark [multiple email messages at once](#) or [all the email messages in an email thread](#) as being read.

How to mark all email messages in a folder as read:

1. [Select](#) an email folder in the folder tree.
2. Click the **Folder-specific actions** icon  next to the folder name. Click on **Mark all email messages as read**.

5.5.4 Collecting addresses

You can collect email addresses by adding the addresses to an address book. The following possibilities are available:

- Automatically collect new email addresses when sending or reading email messages by activating this function in the [Email settings](#).
- Manually adding email addresses to an address book

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


1. Select an email in the side bar.
2. Click on a sender's or a recipient's name in the display area.
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.

5.5.5 Categorising email messages with labels

You can categorise an individual email or a complete email thread with a coloured label.

How to categorise an email with a label:

1. Select an email in the side bar.
2. Click the **Label** icon  in the display area.
3. Click on a label in the menu.

In order to remove the label, click on **None** in the **Label** menu.

Tip: You can also categorise [multiple email messages at once](#) or [all the email messages in an email thread](#) with a label.

5.5.6 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 email in the side bar.
2. Click on **More** in the display area. Select **View source** from the menu. The source is displayed in the *View source* window.

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

5.5.7 Working with email drafts

The following options are available:

- [saving an email as a draft](#) while you are composing the email
- [sending a saved email draft](#)

How to save an email as a draft:

In the *Compose new email* window, click on *Save*.

Result: The email is saved in the *Drafts* folder.

How to send a saved email draft:

1. [Open](#) the *Drafts* folder.
2. Select an email draft in the side bar.
3. Click on **Edit** in the display area.
4. Complete the entries. Click on **Send**.

5.5.8 Enabling an email reminder

You can enable a reminder for an email. This function creates a task and reminds you of the due date.

How to activate the email reminder:

1. Select an email in the side bar.
2. Click on **More** in the display area. Select **Reminder** from the menu.
3. Complete the details in the *Remind me* window. Select a time from the **Remind me** drop-down field. Click on **Create reminder**.

5.5.9 Adding an email to the portal

You can add an email as portal square to the portal.

How to add an email to the portal:

1. Select an email in the side bar.
2. Click on **More** in the display area. Select **Add to portal** from the menu.

5.5.10 Saving email messages

You can save an email as a text file. The text file will have the file extension EML.

How to save an email:

1. Select an email in the side bar.
2. Click on **More** in the display area. Select **Save as file** from the menu.
3. Follow the instructions for saving the EML file.

5.5.11 Importing email messages

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

How to import an email:

1. [Open](#) the email folder into which you want to import the email.
2. Drag the EML file from your operating system's desktop to the *E-Mail* app window. Drop the EML file in the app window.

5.5.12 Printing email messages

In order to print email messages, you can do the following:

- [print an email's content](#)

How to print an email's content:

1. Select an email in the side bar. Click on **More** in the display area. Click on **Print** in the menu. A window with a print preview will open.
2. If required, change the printer settings. Click on the **Print** button.
3. Close the print preview window.

Tip: You can also print the contents of [multiple email messages at once](#).

5.5.13 Deleting email messages

The following options are available:

- [Delete](#) individual email messages or entire email threads. By default, the email messages are moved to the Trash folder.
- [Delete all email messages in an email folder](#). By default, the email messages are moved to the Trash folder.
- [Recover](#) deleted email messages from the Trash.
- [Permanently delete](#) email messages from the trash. Permanently deleted email messages are irrevocably lost.

Warning: If you enable the email settings option [Permanently remove deleted email messages](#) you will not be able to recover deleted email messages. It is recommended that you not use this setting.


How to delete email messages:

1. Select an email in the side bar.
2. Click on **Delete** in the display area.

Result: The email is moved to the *Trash* folder.

Tip: You can also delete [multiple email messages at once](#) or [all the email messages in an email thread](#).

How to delete all email messages in a folder:

1. In the folder tree, **select** the folder that contains the email messages that you want to delete.
2. Click the **Edit folder** icon  below the folder tree. Click on **Empty folder**.

Result: The email messages are moved to the *Trash* folder.

How to recover deleted email messages:

1. **Open** the *Trash* folder in the folder tree.
2. Select an email in the side bar.
3. Click on **More** in the display area. Select **Move** from the menu.
4. Select a folder in the *Move* window. Click on *Move*.

Result: The email is moved to the selected folder.

How to permanently delete an email from 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. **Open** the *Trash* folder in the folder tree.
2. Select an email in the side bar.
3. Click on **Delete** in the display area.

Result: The email is permanently deleted.

5.5.14 Cleaning up E-Mail folders

Depending on the 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.

How to clean up an E-Mail folder:

1. In the folder tree, **select** the folder that you want to clean up.
2. Click the **Folder-specific actions** icon  next to the folder name. Click on **Clean up**.


Result: E-Mail messages that you deleted in an external E-Mail client, are removed from the folder.

5.5.15 Editing multiple email messages at once

The following functions can be applied to multiple email messages at once:

- forwarding email messages
- moving or copying email messages to another folder
- marking email messages as read or unread
- deleting email messages
- printing multiple email messages
- saving email messages as a file

How to apply a function to multiple email messages at once:

1. Click the **Select** icon  below the side bar. Each email will have a checkbox in the side bar.
2. Check the boxes for at least two email messages.
You can also use your system's multi-selection functions.
In order to clear the selection, click on **Unselect all** in the display area.
In order to select all email messages in the currently selected folder, enable the **Select all** checkbox on the bottom left side of the side bar.
3. Click on a function in the display area.

5.5.16 Editing all the email messages in an email thread

You can activate the following functions for all the email messages in an email thread at once:

- forwarding email messages
- moving or copying email messages to another folder
- marking email messages as read or unread
- categorising email messages with a label
- deleting email messages

How to activate a function for all the email messages in an email thread at once:

1. Select the current email in the email thread in the side bar. The current email is listed on top of the email thread.
2. Click on *Entire thread* on top of the email in the display area. Select a menu entry.

5.5.17 Using Unified Mail


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

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

The following functions are available:

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

How to activate Unified Mail for an email account:

1. Click the **System menu** icon  on the right side of the menu bar. Click on **Settings**.
2. Click on **Email and Social Accounts** in the side bar.
3. Select an external email account in the display area below *Email and Social Accounts*.
4. Click on **Edit**. A pop-up will show the settings.
5. Enable **Use Unified Mail for this account**.
6. Click on **Save** in the pop-up.

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

1. [Open](#) the *Unified Mail* folder in the folder tree.
2. Alternatively, click on a subfolder in the *Unified Mail* folder.

Tip: The account is indicated with a label below an email's subject in the side bar.

5.5.18 Using email Filters

E-Mail filters help you organize 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.

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.

You have the following options:




- [Creating](#) a new rule.
- [Changing](#) existing rules.

Some E-Mail functions automatically set up filters, e.g.: the [vacation notice \[52\]](#).

How to create a new rule:

1. Click the **System menu** icon  on the right side of the menu. Click on the menu entry **Settings**.
2. In the side bar, click on **Mail Filter**.
3. In the display area, click on **Add new rule**. The *Create new rule* window opens.
4. Enter a name for the rule.
5. In order to add a condition click on **Add condition**. Make a selection from the drop-down menu.
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 display an E-Mail's header by [Viewing the source data \[55\]](#).
You can select a criterion by clicking on **Matches**. Enter an argument in the input field.
Examples can be found in the [Questions about email messages](#).
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**.
To delete a condition, click the **Delete** icon  next to the condition.
6. Specify the action to be executed if the rule is met. To do so, click on **Add action**. Select an action from the menu. Depending on the action, additional details might be required.
You can add additional actions.
7. You can set whether subsequent rules are to be processed if the rule is met. To do so, enable or disable **Process subsequent rules**.
8. Click on **Save**.

How to change existing rules:

1. Click the **System menu** icon  on the right side of the menu bar. In the menu click on **Settings**.
2. In the side bar, click on **Mail Filter**.
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 the rule. Drag the rule up or down and drop it appropriately.
6. To delete a rule, click the **Delete** icon  next to the rule.

5.6 Email 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](#)

5.6.1 Sharing Email Messages


You can share your email messages with internal users. Depending on the requirements, different methods can be applied.

- 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 with all users or only with certain users.
 - The users have to [subscribe](#) to your shared email folder in order to have access to the email messages.
- If another user shares an email folder with you, you have to [subscribe](#) to the shared email folder in order to have access to the email messages.

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

5.6.3 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 email from the side bar.
2. Click on **All recipients** in the display area.
 - Note:** This button is only displayed if the email has multiple recipients.
3. Select **Invite to appointment** from the menu.
4. Complete the data for [Creating an appointment \[86\]](#).

5.6.4 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 email from the side bar.
2. Click on **All recipients** in the display area.
Note: This button is only displayed if the email has multiple recipients.
3. Select **Save as distribution list** from the menu.
4. Complete the data for [Creating a distribution list \[74\]](#).

5.7 E-Mail Accounts

If you use [external email accounts](#) e.g.: Google Mail, you can access those email accounts from within the groupware provided you have set up the external email accounts in the settings. Each external email account will receive its own email folder.


- First you have to [set up or edit](#) external email accounts.
- You can then [use](#) the external email accounts.

5.7.1 Setting up and editing E-Mail accounts

The following options are available:

- [setting up](#) an external email account
- [editing](#) an E-Mail account
- [deleting](#) an external email account

How to set up an external email account:


1. Click the **System menu** icon  in the menu bar. Select **Settings** from the menu.
2. Click on **Email and Social Accounts** in the side bar.
3. Click on **Add** in the display area. Select **Email Account** from the menu.
4. In the *Add email account* window enter the email address used for the external email account. Enter the password for the external email account. Click on **Add**.
5. After a short while you will be informed that the external email account has been set up. Click on **Close**.

Now you can [use](#) the external email account.

Tip: You can also set up an external email account by clicking on the + button below the [email folder tree](#). Select **Add Email account** from the menu.

How to edit the settings of an E-Mail account:


Note: Usually it is not necessary to change the E-Mail account settings.

1. Click the **System menu** icon  in the menu bar. Select **Settings** from the menu.
2. Click on **Email and Social Accounts** in the side bar.
3. Select an E-Mail account in the display area below *Mail and Social Accounts*.
4. Click on **Edit**. The settings are displayed in a pop-up.
5. Change the settings.

Note: If you enter a name in the **Your name** field of the *Account settings*, this name overwrites the preset sender name.

6. Click on **Save** at the bottom of the pop-up.

How to delete an external email account:

1. Click the **System menu** icon  in the menu bar. Select **Settings** from the menu.
2. Click on **Email and Social Accounts** in the side bar.
3. Select an external email account in the display area below *Email and Social Accounts*.
4. Click on **Delete**. Confirm that you want to delete the external email account.

5.7.2 Using an external email account

The following options are available:

- [displaying](#) the email messages of an external email account
- Send an email and [enter the address for an external email account](#) in the recipient field

How to display the Email messages of an external E-Mail account:

Prerequisite: You have [set up](#) an external email account.

1. Click on **Email** in the menu bar.
2. In the folder tree, [open](#) the folder with the name of the external email account.

Tip: If you enabled *Unified Mail* for the external email account, you will also see the email messages in the *Unified Mail* folder. Information can be found in [Using Unified Mail \(page 59\)](#).


How to send an email from an external email account:

Prerequisite: You have [set up](#) an external email account

1. In the folder tree, [open](#) the folder with the name of the external email account.
2. Click on **Compose new email**.
3. Fill in the required fields for [sending an email \[50\]](#). Click on **Send**.

5.8 Email Settings

How to use the general Email settings:

1. Click the **System menu** icon  in the menu bar. Select **Settings** from the menu.
2. Click on **Email** in the side bar.
3. Change the [settings \[66\]](#).

The following settings are available:

- [Permanently remove deleted email messages](#)
- [Automatically collect contacts in the "Collected addresses" folder while sending email messages](#)
- [Automatically collect contacts in the "Collected addresses" folder while reading email messages](#)
- [Use fixed-width font for text email messages](#)
- [Append vCard](#)
- [Insert the original Email text into a reply?](#)
- [Thread View](#)
- [Forward Email Messages as](#)
- [Format email messages as](#)
- [Line wrap when sending text email messages after](#)
- [Default sender address](#)
- [Auto-save email drafts](#)
- [Allow HTML formatted Email messages?](#)
- [Allow pre-loading of externally linked images](#)
- [Display emoticons as graphics in text Email Messages?](#)
- [Colour quoted lines?](#)
- [Ask for delivery receipt](#)
- [Signature](#)
- [IMAP folder subscription](#)

Permanently remove deleted email messages

Defines whether email messages will be removed permanently immediately after you click the Delete button or whether they will go to the trash folder.

Warning: Permanently removed email messages can not be restored.

Automatically collect contacts in the "Collected addresses" folder while sending email messages

Defines whether new email addresses are automatically collected in the **Collected contacts** folder when sending a new email. The **Collected contacts** folder is located below your personal contact folder.

Automatically collect contacts in the "Collected addresses" folder while reading email messages

Defines whether new email addresses are automatically collected in the **Collected contacts** folder when reading a new email. The **Collected contacts** folder is located below your personal contact folder.

Use fixed-width font for text email messages

Specifies whether a fixed-width font is used when composing a plain text email.

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.

Thread View

Specifies the email folders for which the thread view should be activated.

If selecting **Enabled for inbox only**, the thread view will only be used for the *Inbox* folder.

If selecting **Enabled for all mail folders**, the thread view will be used for all email folders and subfolders.

If selecting **Disabled**, the thread view will not be used.

Note: When changing this setting, you have to login again in order to activate the change.

Forward Email Messages as

Specifies how email text is sent when forwarding the email:

When choosing the **Inline** option, the text is sent within the body of the new email.

When choosing the **As attachment** option, the text is sent as an attachment to the new email.

Format email messages as

Defines the format in which email messages are sent:

If using the **HTML** option, the email text is sent with HTML markup. You can format the email text.

If using the **Plain text** option, the email text is sent as plain text without formatting.

If using the **HTML and plain text** option, the email text is sent with HTML markup and as plain text.

Line wrap when sending text email messages after

Specifies at how many characters a line break is inserted in the text of a new email.

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 E-Mail address. If you enter a name in the **Your name** field of the [E-Mail Accounts settings \[64\]](#), this name overwrites the preset sender name.

Auto-save email drafts

Specifies the interval for saving an email to the *Drafts* folder while it is being composed. The **Disabled** option deactivates this function.

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.

Allow pre-loading of externally linked images

Specifies whether or not the preview of externally linked graphics in HTML email messages is allowed:

If this option is disabled, external graphics are not directly displayed. This setting protects your privacy.

If this option is enabled, external graphics are loaded and displayed when viewing an HTML message.

Display emoticons as graphics in text Email Messages?

Specifies whether emoticons will be displayed as graphics or as characters. For example, if you type in a smiley after having selected this option, the smiley will be displayed either as a graphic or as a colon followed by a round bracket.

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.

Ask for delivery receipt

Defines whether a delivery receipt is displayed if a received E-Mail includes receipt confirmation request.

Signature

An email signature is text that is automatically entered in the email when being composed. It is typically used for inserting the name, company, and contact address at the bottom of the email text. The following functions are available.

- **Add new signature** button. In order to create a new signature, click on this button. In the pop-up enter a name for the signature and the data. Click on **Save**.
- **Set as default** button. In order to set the signature as default, click on this button.
- **Edit** button. In order to edit a signature, click on **Edit** next to the signature. Change the data in the pop-up. Click on **Save**.
- **Delete** button. In order to delete a signature, click the **Delete** icon  next to the signature.

IMAP folder subscription

Contains functions for [subscribing \[62\]](#) to email folders.

6 Address Book

Learn how to use the *Address Book* application.

- the *Address Book* components
- find and display contacts
- create and add contacts from various sources
- combine several contacts into distribution lists
- edit and organise contacts
- share contacts with other users
- access contacts in your social networks
- interchange contacts with other applications
- Use *Address Book* settings

How to start the *Address Book* app:




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

6.1 The *Address Book* Components


An introduction to the user interface can be found in [The User Interface](#).


Tool bar

Contains the following icons:

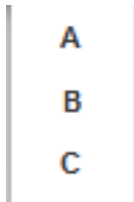
- **Add** icon . Creates a [new contact \[73\]](#) or a [new distribution list \[73\]](#).
Note: This function is only enabled if you have opened an address book for which you have the appropriate permissions to create objects.
- **Folder** icon . Opens or closes the [folder tree](#).
- **Search** icon . Opens an input field for [searching \[140\]](#) for contacts with a certain name.

Folder tree

Displays the contacts folders and enables you to [navigate the folder structure \[141\]](#). In order to open the folder tree, click the **Toggle Folder** icon  in the tool bar. The following functions are available:

- If clicking on a folder, its contacts are displayed.
- The **Folder-specific actions** icon  next to the selected folder offers functions for [organising data \[139\]](#) and for [exchanging data \[151\]](#).
- Buttons in the folder tree offer functions for [creating folders \[142\]](#).


Navigation bar



Displays the contacts in the side bar starting with the letter selected.

Side bar

Displays the names of the contacts in the opened address book. The name and the first email address are displayed. The following functions are available:

- If clicking on a contact its data is displayed in the [Display area](#).
- If clicking the **Select** icon  below the side bar, a checkbox is displayed next to each contact. You can select multiple contacts to [edit them all at once \[77\]](#).
- The text below the list contains the name of the selected folder. The number corresponds to the number of objects in the selected folder.

Display area

Displays the contact data and the available functions:

- Buttons: **Send mail** [75], **Invite to appointment** [75], **Edit** [75], **Delete** [76].
If clicking on **More**, a menu with the following functions opens: **Send as vCard** [76], **Print** [76], **Move** [76], **Copy** [76].
Note: Some buttons might not be displayed if you do not have the appropriate permissions.
- Picture, name, job position, profession
- Business and private addresses
- Business and private phone numbers
- Email addresses. If clicking on an email address a page for [sending a new email \[50\]](#) opens.
The extent of information displayed can vary.

6.2 Displaying Contacts

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

How to display a contact:

1. [Open](#) an address book in the folder tree.
2. In order to quickly find the wanted contact, use the following methods:
 - In order to only display contacts with a certain first name or surname, use the [search function](#).
 - In order to display contacts with a certain initial letter, click a letter in the [navigation bar](#).
3. Click on a contact in the side bar. The contact's data is displayed in the display area.
4. In order to display another contact, do one of the following:
 - Click on another contact in the side bar.
 - Browse the list with the cursor keys.

6.3 The Halo View

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

- addresses, email addresses, phone numbers
- your current correspondence with this contact
- shared appointments with this contact

How to display a contact in the halo view:

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

6.4 Adding Contacts



The following options are available:

- [Creating a new contact](#)
- [Adding a contact from vCard](#)
- [Importing contacts from files](#)
- [Importing contacts from social networks](#)

6.4.1 Creating a new contact

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

How to create a new contact:

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

6.4.2 Adding a contact from vCard

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 email messages vCard attachment:

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

6.4.3 Importing contacts from files

Information on importing contacts from various files can be found in [Importing Data \(page 152\)](#).




6.4.4 Importing contacts from social networks

You can import your contacts from social networks like LinkedIn or Facebook to a contacts folder by subscribing to the contacts. More information can be found in [Subscribing to data \(page 148\)](#).

6.5 Creating Distribution Lists

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

How to create a new distribution list:

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

6.6 Organising Contacts

Some of the techniques for organising contacts require that contact folders have already been set up by you. Information about creating folders can be found in [Folders \(page 141\)](#).

The following options are available:

- [Sending Email Messages from within an address book](#)
- [Inviting contacts to an appointment](#)
- [Editing contacts](#)
- [Moving contacts](#)
- [Copying contacts](#)
- [Sending contacts as vCard](#)
- [Printing contacts](#)
- [Deleting contacts](#)
- [Editing multiple contacts at once](#)

6.6.1 Sending Email Messages from within an address book

You can send an email from within your address book to a contact, to [multiple contacts](#) or to a distribution list.

How to send an Email from within an address book:

1. Select a contact or a distribution list from the side bar.
2. Click on **Send email** in the display area.
3. Fill in the details in order to [Send a new email \[50\]](#).

6.6.2 Inviting contacts to an appointment

You can use the address book to invite a contact, [multiple contacts](#) or a distribution list's contacts to an appointment.

How to invite contacts to an appointment:

1. Select a contact or a distribution list from the side bar.
2. Click on **Invite to appointment** in the display area.
3. Complete the details for [creating an appointment](#).

6.6.3 Editing contacts

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

How to edit a contact:

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

1. Select a contact in the side bar.
2. Click on **Edit** in the display area. The contact's data is displayed.
3. Edit the data.
4. Click on **Save**.

6.6.4 Moving contacts

You can move one contact or [multiple contacts at once](#) to another folder.

How to move a contact to another folder:

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

1. Select a contact in the side bar.
2. Click on **More** in the display area. Select **Move** from the menu.
3. Select a folder in the *Move* window. Click on *OK*.

Tip: In order to move contacts using drag and drop, select a contact or [multiple contacts](#) in the side bar. Drag the selected contacts to a folder in the folder tree. Drop them there.

6.6.5 Copying contacts

You can copy one contact or [multiple contacts at once](#) to another folder.

How to copy a contact to another folder:

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

1. Select a contact in the side bar.
2. Click on **More** in the display area. Select **Copy** from the menu.
3. Select a folder in the *Copy* window. Click on *OK*.

6.6.6 Sending contacts as vCard

You can send a contact or [multiple contacts at once](#) as a vCard attachment to an email.

How to send a contact as a vCard attachment:

1. Select a contact in the side bar.
2. Click on **More** in the display area. Click on **Send as vCard** in the menu.
3. Complete the details for [sending a new email \[50\]](#).

6.6.7 Printing contacts

In order to print contacts you can:

- [print a contact's phone data](#)

How to print a contact's phone data:

1. [Open](#) an address book in the folder tree.
2. Select a contact in the side bar. Click on **More** in the display area. Click on **Print** in the menu. A window with a print preview will open.
3. If required, change the printer settings. Click on the **Print** button.
4. Close the print preview window.

Tip: You can also print a phone list with [multiple contacts](#).

6.6.8 Deleting contacts

You can delete an individual contact or [multiple contacts at once](#).

How to delete a contact:

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

1. Select a contact in the side bar.
2. Click on **Delete** in the display area.
3. Confirm that you want to delete the contact.


Result: The contact is deleted.

6.6.9 Editing multiple contacts at once

The following functions can be applied to multiple contacts at once:

- sending an email to multiple contacts
- inviting contacts to an appointment
- moving or copying contacts to another folder
- sending contacts as vCard attachments
- printing multiple contacts
- deleting contacts

How to apply a function to multiple contacts at once:

1. Click the **Select** icon  below the side bar. A checkbox is displayed next to each contact in the side bar.
2. Check the boxes for at least two contacts.
You can also use your system's multi-selection functions.
In order to select all contacts in the currently selected folder, enable the **Select all** checkbox on the bottom left side of the side bar.
3. Click on a function in the display area.

6.7 Contacts within Teams

You can share your contacts with internal and external partners. Depending on the requirements, several methods can be used.

- 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, proceed as follows:

 Create a new personal or public folder where you can copy or move the wanted contacts to.

 Share this folder with all or certain users.

You can also share an existing folder with read or write permissions. Further information can be found in [Permissions](#).

- To share contacts with external partners proceed as follows:

 Create a new personal or public folder and copy or move the wanted contacts to it.

 Use the publish function to publish this folder.

Further information can be found in [Publishing data](#).

- If another user published a contact folder, you can access those contacts by subscribing to that contact folder. Further information can be found in [Subscribing to data](#).
- If another user shared a contact folder with you, you can use those contacts. Further information can be found in [Permissions](#).


6.8 Interchanging Contacts with Other Applications

You can do the following:

- [export \[157\]](#) contacts to use them in other applications
- [import \[152\]](#) contacts that you created in other applications

6.9 Address Book Settings

How to use the address book settings:

1. Click the **System menu** icon  in the right side of the menu bar. Click on **Settings** in the menu.
2. Click on **Address book** in the side bar.
3. Change the [settings \[80\]](#).

The following options are available.

- [Display of names](#)
- [My contact data](#)

Display of names

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

My contact data

Opens a page where you can change your personal contact data.

7 Calendar

Learn how to use the *Calendar* application.

- the [Calendar components](#)
- [display](#) appointments
- [create](#) appointments
- [answer](#) appointment invitation
- [manage](#) appointments
- [share](#) calendars with other users
- use the [Calendar settings](#)

How to start the *Calendar* app:







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

7.1 The *Calendar* Components


An introduction to the user interface can be found in [The User Interface](#).


Tool bar

Contains the following icons:

- **Add** icon . Creates a [new appointment \[86\]](#).
Note: This function is only enabled if you opened a calendar for which you have the appropriate permissions to create objects.
- **Toggle Folder** icon . Opens or closes the [Folder tree](#).
- **Toggle Search** icon . Opens an input field in order to [search \[140\]](#) for appointments with a certain subject.
- **View** icon . Selects one of the following views for the display area:
 - [Day, Work week, Week, Month](#)
 - [List](#)
- **Scheduling** icon . Opens the scheduling view for scheduling [appointments with multiple participants \[95\]](#).
- **Print** icon . Opens the print preview for [printing a calendar sheet \[91\]](#).

Folder tree

Displays the calendar folders. Enables [navigation within the folder structure \[141\]](#). In order to open the folder tree, click the **Toggle Folder** icon  in the tool bar. The following functions are available:

- If clicking on a folder, appointments within that folder are displayed.
- The **Folder-specific actions** icon  next to the selected folder offers functions for [organising data \[139\]](#) and for [exchanging data \[151\]](#).
- Buttons in the folder tree offer functions for [creating folders \[142\]](#).
- If you use several personal calendar folders, the checkbox **Show appointments from all private calendars** is displayed. It defines whether only the appointments of the current calendar folder or the appointments of all personal calendar folders are displayed.

Display area in the calendar views *Day, Work week, Week, Month*



Displays the calendar view for the selected time range.

- The selected time range is displayed at the top left corner of the calendar sheet.
- In the calendar views *Day, Work week*, and *Week* the current calendar week is displayed next to the date.
If clicking on a date, a mini-calendar opens that helps you select another date.
- The navigation bar above the calendar sheet allows selecting a time range.
- In the *Day, Work week* and *Week* views an area for [creating \[86\]](#) all day appointments is shown on top of the calendar sheet.
- In the *Day, Work week* and *Week* views the current time in the calendar sheet is highlighted with a red line.
- In the *Work week, Week* and *Month* views the current day in the calendar sheet is highlighted with a coloured background.
- In the *Month* view the selected month, calendar week, and the year are displayed to the right of the calendar sheet. A scroll bar on the right side allows selecting a different month.
- Depending on the confirmation status, the appointments are highlighted with different [colours \[84\]](#).

If clicking on an appointment, the data is shown in the [pop-up](#). It displays the same information as the [display area in the List view](#).

Side bar in the *List* view

Displays a list of appointments in the currently selected folder. Date, time, time zone, private appointment icon, subject and location are displayed. The following functions are available:

- If clicking on an appointment, its data is displayed in the [display area](#).
- If clicking on a header, the first appointment of this time range is displayed.
- If clicking the **Select** icon  below the list, a checkbox is displayed next to each appointment. You can select multiple appointments in order to [edit them all at once](#) [92].
- The text below the list contains the names of the selected folder. The number corresponds to the number of objects in the selected folder.
- If clicking the **Sort** icon  below the list, a menu opens that helps you sort appointments. With the **Show all** checkbox you can define whether you only want to view the appointments in the currently selected calendar or all appointments from all your private calendars.

Display area in the *List* view

Shows the appointment data and the functions available:

- Buttons: [Edit](#) [90], [Change status](#) [91], [Move](#) [91], [Print](#) [91], [Delete](#) [92]
Note: Depending on the server 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 can not change or delete the appointment. If you are the organiser, you cannot change your status.
- Date, the recurrence type (for recurring appointments), time and time zone
- Subject
- Appointment location, if entered
- Appointment description, if entered
- Names of the participants, if they exist. If clicking on a name, a [pop-up](#) opens. It consists of the following components:
 - The person's contact data
 - If you have exchanged email messages with this person, they are displayed below *Recent conversations*.
 - If you have appointments scheduled with this person, they are displayed below *Shared appointments*.If clicking on an appointment or an email, an additional pop-up opens.
- If the appointment has other participants, the buttons [Send Email to all participants](#) [94], [Invite to new appointment](#) [94], and [Save as distribution list](#) [95] are displayed.
- 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*.
- Details
 - the appointment's organiser
 - availability
 - which folder
 - who created the appointment and when
 - who was the last person to modify the appointment

7.2 Displaying Appointments


You can choose between the following views:

- the [list view](#) of a calendar's appointments
- the [calendar views](#) of a calendar's appointments

You can define a default view in the [calendar settings](#).


7.2.1 Displaying appointments in the calendar view

How to display appointments in the calendar view:

1. Click the **View** icon  in the tool bar. Click on one of the following entries: **Day**, **Work week**, **Week** or **Month**.
2. [Open](#) a calendar folder in the folder tree.
3. If you use several personal calendar folders you can define the appointments to be displayed.
To display all the appointments from all your personal calendars, enable **Show appointments from all private calendars** in the folder tree.
To only display the appointments in the currently selected calendar, disable **Show appointments from all private calendars**.
4. Click on an appointment in the calendar sheet. The calendar's data is displayed in the [pop-up](#). You can do the following:
Display a participant's or a resource's details by clicking on the participant's or the resource's name. An additional pop-up opens.
[Edit \[90\]](#) the appointment.
[Delete \[92\]](#) the appointment.

7.2.2 Displaying appointments in the list view

How to display an appointment in the list view:

1. Click the **View** icon  in the tool bar. Click on **List**.
2. [Open](#) a calendar folder in the folder tree.
3. If you use several personal calendar folders you can define the appointments to be displayed.
To display all the appointments from all your personal calendars, enable **Show appointments from all private calendars** in the folder tree.
To only display the appointments in the currently selected calendar, disable **Show appointments from all private calendars**.
4. To quickly find a particular appointment, use the [search function](#).
5. Click on an appointment in the side bar. The appointment's data is displayed in the [display area](#).
6. To display another appointment, use one of the following methods:
Click on another appointment in the side bar.
Use the cursor keys to browse the list.

7.2.3 How are appointments displayed?

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

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

7.3 Creating Appointments

The following options are available:


- [Creating new appointments](#)
- [Creating appointments from iCal attachments](#)
- [Importing appointments from files](#)
- [Subscribing to appointments from other calendars](#)

7.3.1 Creating new appointments

In order to create a new appointment, you have the following options:

- [Create an appointment](#) by entering subject, time, and location.
- [Use additional functions](#): create recurrence, add other participants or resources, set the availability or add attachments.

How to create a new appointment:

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

Tip: Alternatively, you can use one of the following methods:

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

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






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

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

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

How to use additional functions when creating appointments:

Prerequisite: The page for creating a new appointment is open.

1. To create a recurring appointment, activate **Repeat**. The current repetition parameters are displayed. To set the repetition parameters, click on the value. Examples can be found in the [Calendar questions and answers](#).
To hide the repetition parameters, click the **Close** icon . To show them again, click on **Edit**.
 2. In **Display as** you can set the availability display. Examples can be found in [Calendar questions and answers](#).
 3. If the subject should not be shown to other users, activate **Private**. Private appointments are marked with the *Private* icon .
 4. To add other participants or resources, enter the participants' email addresses or the resource's name in the input field below *Participants*. Click the  icon.
Tip: While entering the email address, 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 remove a participant or a resource, click the icon  next to the name.
To add multiple participants, you can enter the name of a [distribution list \[74\]](#).
To inform all participants about the new appointment, enable *Notify all participants by email*.
Tip: To find free times for all participants and resources you can [use the schedule view \[95\]](#).
 5. To add an attachment to the appointment, click on **Select file** below *Attachments*. Select one or several files.
To remove an attachment, click the **Delete** icon .
- Tip:** You can also add an attachment by dragging and dropping a document from the file browser or the desktop to the appointment window.

7.3.2 Creating appointments from iCal attachments

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

How to create an appointment from an email's iCal attachment:

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

7.3.3 Importing appointments from files

Information on importing appointments from files can be found in [Importing Data \(page 152\)](#).

7.3.4 Subscribing to appointments from other calendars

You can import appointments from other calendars, e.g.: from your Google calendar, to a calendar folder by subscribing to the other calendar. Additional information can be found in [Subscribing to data \(page 148\)](#).

7.3.5 Resolving appointment conflicts

An appointment conflict happens if the following is true:

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

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

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

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

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


7.4 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 [email 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 **Unread badge** icon in the menu bar . The *Notification area* is displayed.
2. Click on **Accept/Decline** below *Invitations*.
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 email invitation:

1. Open an E-Mail with an appointment invitation in the *E-Mail* application.
2. Click on one of the buttons **Accept**, **Tentative**, **Decline** in the display area below *This email contains an appointment*.

7.5 Managing appointments

Some of the techniques for organising appointments require having all ready set up your own calendar folders. Information about creating folders can be found in [Folders \(page 141\)](#).

The following options are available:

- [Editing appointments](#)
- [Editing appointments with drag and drop](#)
- [Changing the appointment status](#)
- [Moving appointments to another folder](#)
- [Printing appointments](#)
- [Deleting appointments](#)
- [Editing multiple appointments at once](#)

7.5.1 Editing appointments

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

How to edit an appointment:

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

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

1. Depending on the view selected, use one of the following methods:

Click on an appointment in the *Day*, *Work week*, *Week* or *Month* view. In the pop-up, click on **Edit**.

In the *List* view, select an appointment in the side bar. Click on **Edit** in the display area.

The appointment data is displayed in a new page.

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

7.5.2 Editing appointments with drag and drop

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

- [move](#) an appointment to another day
- change an appointment's [time](#)
- change an appointment's [start or end](#)

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

How to move an appointment to another day:

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

How to change an appointment's time:

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

How to change the start or end of an appointment:

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

7.5.3 Changing the appointment status

You can change your appointment status at a later point in time. Depending on the server configuration, you can only edit an appointment in your private calendars if you are the appointment's organiser.

How to change your appointment status:

1. Depending on the view selected, choose one of the following methods:
 - Click on an appointment in the *Day*, *Work week*, *Week* or *Month* view. In the pop-up, click on **Change status**.
 - In the *List* view, select an appointment in the side bar. Click on **Change status** in the display area.
2. Enter a comment in the *Change confirmation status* window. Click on one of the buttons **Decline**, **Tentative** or **Accept**.

7.5.4 Moving appointments to another folder

You can move an individual appointment or [multiple appointments at once](#) to another folder.

How to move an appointment to another folder:

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



1. Depending on the view selected, use one of the following methods:
 - In the views *Day*, *Work week*, *Week* or *Month*, click on an appointment. In the pop-up, click on **Move**.
 - In the *List* view, select an appointment from the side bar. Click on **Move** in the display area.
2. Select a folder in the *Move* window. Click on *Move*.

7.5.5 Printing appointments

To print calendars and appointments you can:

- [print a calendar sheet with appointments](#)
- [print an appointment's data](#)

How to print a calendar sheet with appointments:

1. Click the **View** icon  in the menu bar. Click on one of the following entries: **Day, Work week, Week, Month**.
2. **Open** a calendar folder in the folder tree.
3. Specify the appointments to be displayed.
In order to display all appointments in your private calendars, enable **Show all**.
In order to only display appointments in the calendar selected, disable **Show all**.
4. Click the **Print** icon  in the tool bar. A window with a print preview opens.
5. If required, change the printer settings. Click on the **Print** button.
6. 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 the *Day, Work week, Week* or *Month* view. Click on **Print** in the pop-up.
In the *List* view, select an appointment in the side bar. Click on **Print** in the display area.
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.

Tip: You can also print the data of [multiple appointments at once](#).

7.5.6 Deleting appointments

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

How to delete an appointment:

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

1. Depending on the view selected, use one of the following methods:
Click on an appointment in the *Day, Work week, Week* or *Month* view. In the pop-up, click on **Delete**.
In the *List* view, select an appointment in the side bar. Click on **Delete** in the display area.
2. Confirm that you want to delete the appointment by clicking on **Delete**.


Result: The appointment will be deleted.

7.5.7 Editing multiple appointments at once

You can execute the following functions for multiple appointments at once:

- Moving appointments to another folder
- Printing multiple appointments

How to execute a function for multiple appointments at once:

1. In the *List* view, click the **Select** icon  below the side bar. A checkbox is displayed next to each appointment in the side bar.
2. Enable the checkboxes for at least two appointments.
You can also use your system's multi-selection functions.
In order to select all appointments in the currently selected folder, enable the **Select all** checkbox on the bottom left side of the side bar.
3. Click on a function in the display area.

7.6 Team Appointments

The following options are available:

- [Sharing appointments](#)
- [Sending an Email to participants](#)
- [Inviting participants to a new appointment](#)
- [Creating a distribution list from the list of participants](#)
- [Scheduling appointments with several participants](#)

7.6.1 Sharing appointments

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

- To share a calendar with your team, proceed as follows:
 - Create a new personal or public calendar folder.
 - Share this folder with all users on your team. If other team members should be able to enter appointments, share this folder with write permissions.
 - Further information can be found in [Permissions](#).
- To invite external partners to an appointment, proceed as follows:
 - When creating the appointment, add external partners as *external participants*.
 - Make sure the *Notify all participants by email* option is enabled.
 - The external partner receives an email with an appointment invitation in iCal format. Information can be found in [Displaying Appointments](#)

7.6.2 Sending an Email to participants

You can send an email 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 the views *Day*, *Work week*, *Week* or *Month*, click on an appointment. In the pop-up, click on **Send email to all participants**.
 - In the *List* view, select an appointment in the side bar. Click on **Send email to all participants** in the display area.
2. Complete the details for [Sending the email \[50\]](#).

7.6.3 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:
 - Click on an appointment in one of the views *Day*, *Work week*, *Week* or *Month*. In the pop-up, click on **Invite to new appointment**.
 - In the *List* view, select an appointment in the side bar. In the display area, click on **Invite to new appointment**.
2. Complete the details for [creating a new appointment \[86\]](#).

7.6.4 Creating a distribution list from the list of participants

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

How to create a distribution list from an appointment's list of participants:

1. Depending on the view, use one of the following methods:
 - In the views *Day*, *Work week*, *Week* or *Month*, click on an appointment. In the pop-up, click on **Save as distribution list**.
 - In the *List* view, select an appointment from the side bar. Click on **Save as distribution list** in the display area.
2. Complete the details for [creating the distribution list \[74\]](#).

7.6.5 Scheduling appointments with several participants

When scheduling an appointment with several participants or resources, the Scheduling view shows free and busy time periods for the users and resources. In order to use the Scheduling view you have the following options:

- In order to create an appointment you can [use the scheduling view](#) on the Create appointment page.
 - You can [directly open the Scheduling view](#) to create an appointment in a free time period.
- Both options have the same result.


How to use the Scheduling view on the Create appointment page:

1. Add one or several users as participants on the [Create appointment](#) page.
2. Click on **Find a free time period**.
3. The *Scheduling* page shows the following information:
 - The appointment's participants. There is a colour assigned to each participant.
 - The participants' appointments. Each appointment is displayed in the colour assigned to the participant.

You can use the following functions:

 - In order to select another time period, use the navigation bar on top of the calendar sheet.
 - Add or remove participants or resources.
 - To change the view, click on **Change view** on the bottom right side.
4. In the calendar sheet, drag open a free area from the start to the end date of the new appointment. The *Create appointment* page opens.
5. Complete the details for [creating the appointment \[86\]](#).

How to directly open the Scheduling view:

1. Click the **Scheduling** icon  in the tool bar.
2. Add resources or other users as participants at the bottom left side of the *Scheduling* page.
3. The following information is displayed on the page:
 - The appointment's participants. There is a colour assigned to each participant.
 - The participants' appointments. Each appointment is displayed in the colour assigned to the participant.

You can use the following functions:

In order to select another time period, use the navigation bar on top of the calendar sheet.


Add or remove participants or resources.

To change the view, click on **Change view** on the bottom right side.

4. In the calendar sheet, drag open a free area from the start to the end date of the new appointment. The *Create appointment* page opens.
5. Complete the details for [Creating the appointment \[86\]](#).

7.7 Calendar Settings

How to use the calendar settings:

1. Click the **System menu** icon  at the right side of the menu bar. Select **Settings** from the menu.
2. Click on **Calendar** in the side bar.
3. Change the [Settings \[97\]](#).

The following settings are available.

- [Time scale in minutes](#)
- [Start of working time](#)
- [End of working time](#)
- [Display refused appointments](#)
- [Default reminder](#)
- [Mark all day appointments as free](#)
- [Email notification for new, changed or deleted](#)
- [Email notification for appointment creator](#)
- [Email notification for appointment participant](#)
- [Automatically delete a notification email after it has been accepted or declined?](#)

Time scale in minutes

Specifies the interval for dividing the time grid in the *Day*, *Work week* or *Week* calendar views.

Start of working time

Defines the start of working hours.

End of working time

Defines the end of working hours.

Display refused appointments

Defines whether appointments that you refused are displayed.

Default reminder

Defines the pre-set time interval for the appointment reminder.

Mark all day appointments as free

Defines whether all day appointments are displayed as free by default.

Email notification for new, changed or deleted

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.

Email notification for appointment creator

Specifies whether you will receive an email notification, if the following is true: a participant accepted or declined an appointment created by you.

Email notification for appointment participant

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 a notification email after it 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
- create tasks
- answer task invitation
- organise tasks
- share tasks with other users
- interchange tasks with other applications
- use the *Tasks* settings

How to start the *Tasks* app:




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

8.1 *Tasks* Components


An introduction to the user interface can be found in [The User Interface](#).


Tool bar

Contains the following icons:

- **Add** icon . Creates a [new task](#) [102].
- **Toggle Folder** icon . Opens or closes the [folder tree](#).
- **Toggle Search** icon . Opens an input field to [search](#) [140] for tasks with a particular subject.



Folder tree

Displays the tasks folders. Allows [navigation within the folder structure](#) [141]. To open the folder tree, click the **Toggle Folder** icon  in the tool bar. The following functions are available:

- If clicking on a folder, its tasks are displayed.
- The **Folder-specific actions** icon  next to the selected folder offers functions for [organising data](#) [139] and for [exchanging data](#) [151].
- Buttons in the folder tree offer functions for [creating folders](#) [142].

Side bar

Displays a list of tasks in the folder selected. The subject, status or due date, and the progress are displayed. The following functions are available:

- If clicking on a task, its data are displayed in the [display area](#).
- If clicking the **Select** icon  below the list, a checkbox is displayed next to each task. You can select multiple tasks.
- The text below the list contains the name of the folder selected. The number corresponds to the number of objects in the selected folder.
- If clicking the **Sort** icon  below the list, a menu opens that allows sorting tasks. You can also define, in this menu, whether done tasks are displayed.



Display area

Displays the task's data and the functions available:

- Buttons: **Edit** [104], **Delete**, [105], **Done** [104], **Change due date** [104]
If clicking on **More**, a menu with the following functions opens: **Move** [104], **Change confirmation status** [105], **Print** [105].
- Subject
- Due date, if entered
- Status and progress
- Priority icon
- 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

8.2 Displaying Tasks

How to display a task:


1. [Open](#) a tasks folder in the folder tree.
2. To quickly find a particular task, use one of the following methods:
 - To find tasks with a particular subject, use the [search function](#).
 - To sort the tasks list, click the **Sort** icon  below the list. Select a sort criteria from the menu.
 - To only display due tasks in the list, click the **Sort** icon  below the list. Disable **Show completed tasks** in the menu.
3. Click on a task in the sidebar. The task's data is displayed in the display area.
4. To display another task, use one of the following methods:
 - Click on another task in the side bar.
 - Use the cursor keys to browse the list.

8.3 Creating Tasks

In order to create a new task, proceed as follows:





- [Create a task](#) by entering the subject and the due date
- [Use additional functions](#): creating recurring tasks, adding participants and resources, adding attachments, adding details

How to create a new task:

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

How to use additional functions when creating a task:

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

1. In order to create a recurring task, enable **Repeat**. The current recurrence parameters will be displayed.
In order to set a recurrence parameter, click on it. Examples can be found in the [questions about appointments and tasks](#).
In order to hide the recurrence parameters, click the **Close** icon . In order to display them again, click on **Edit**.
2. In order to add an additional participant, enter the participant's email address in the input field below *Participants*. Click the  icon.
Tip: While entering the email addresses, matching suggestions are displayed. In order 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.In order to remove a participant, click the  icon next to the name.
In order to add multiple participants, you can enter the name of a [distribution list \[74\]](#).
3. In order to add attachments to the task, click on **Attachments**. Click on **Select file**. Select one or multiple files.
In order to remove an attachment, click the **Delete** icon .
In order to hide the input fields, click on **Attachments**. The attachments added will remain.
Tip: You can also add an attachment by dragging a document from a file browser or from the desktop and dropping it in the task window.
4. In order to add details like billing information, click on **Details**. Enter the required data.


8.4 Answering Task Invitations

If a user or an external partner adds you to a task as 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 [email 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 **New objects** icon in the menu bar . The *Notification area* is displayed.
2. Under *Invitations* click on **Accept/Decline**.
3. Enter a comment in the *Change confirmation status* window. Click on one of the buttons **Accept, Temporary, 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 email with a task invitation in the *E-Mail* application.
2. Click on one of the buttons **Accept, Tentative, Decline** in the display area below *This email contains a task*.

8.5 Managing Tasks

Some of the techniques for organising tasks require having set up your own task folders. Information about creating folders can be found in [Folders \(page 141\)](#).

The following options are available:

- [Editing tasks](#)
- [Marking tasks as done](#)
- [Changing a task's due date](#)
- [Moving tasks](#)
- [Changing task confirmations](#)
- [Printing tasks](#)
- [Deleting tasks](#)
- [Editing multiple tasks at once](#)

8.5.1 Editing tasks

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

How to edit a task:

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

1. Select a task in the side bar.
2. Click on **Edit** in the display area. The task's data is displayed.
To view the complete form, click on **Expand form**.
3. Edit the data.
4. Click on **Save**.

8.5.2 Marking tasks as done

You can mark a task or [multiple tasks at once](#) as done.

How to mark a task as done:

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

1. Select a task in the side bar.
2. Click on **Done** in the display area.

8.5.3 Changing a task's due date

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

How to change a task's due date:

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

1. Select a task in the side bar.
2. Click on **Change due date** in the display area. Select an entry.

8.5.4 Moving tasks

You can move a task or [multiple tasks at once](#) to another folder.

How to move a task:

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

1. Select a task in the side bar
2. Click on **More** in the display area. Click on **Move** in the menu.
3. Select a folder in the *Move* window. Click on *OK*.

Tip: In order to move tasks using drag and drop, select a task or [multiple tasks](#) in the side bar. Drag the selected files to a folder in the folder tree. Drop them there.

8.5.5 Changing task confirmations

You can change your task confirmation at a later point in time.

How to change your task confirmation:

1. Select a task in the side bar.
2. Click on **More** in the display area. 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**.

8.5.6 Printing tasks

In order to print tasks you can do the following:

- [print a task's data](#)

How to print a task's data:

1. Select a task in the side bar.
2. Click on **More** in the display area. 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.

Tip: You can also print the data for [multiple tasks at once](#).

8.5.7 Deleting tasks

You can delete one task or [multiple tasks at once](#).

How to delete a task:

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

1. Select a task in the side bar.
2. Click on **Delete** in the display area.
3. Confirm that you want to delete the task.


Result: The task is deleted.

8.5.8 Editing multiple tasks at once

You can apply the following functions to multiple tasks at once:

- Moving tasks to another folder
- Marking tasks as done or undone
- Deleting tasks
- Printing multiple tasks

How to execute a function for multiple tasks at once:

1. Click the **Select** icon . A checkbox is displayed in the side bar next to each task.
2. Enable the checkboxes for at least 2 tasks.
You can also use your system's multi-selection functions.
In order to select all tasks in the currently selected folder, enable the **Select all** checkbox on the bottom left side of the side bar.
3. Click on a function in the display area.

8.6 Tasks within a Team

You have the following options:

- [Sharing \[107\]](#) tasks with other users
- [Delegating \[107\]](#) tasks to other users

8.6.1 Sharing tasks

You can share your tasks with internal and external partners. Depending on the requirements, different methods can be applied.

- To share a folder with your team, do the following:
 - Create a new personal or public tasks folder.
 - Share this folder with all users in your team. To grant other team members the permission to create appointments, share this folder with write permissions.
 - Further information can be found in [Permissions](#).
- To invite external partners to a task, do the following:
 - When creating the task, add the external partners as *external participants*.

8.6.2 Delegating tasks

You can delegate a task to an internal user when [creating](#) the task. To do so enter the name of the internal user as participant.


8.7 Interchanging Data with Other Applications

You can do the following:

- [export \[157\]](#) tasks to use them in other applications.
- [import \[152\]](#) tasks that you created in other applications.

8.8 Task Settings

How to use the task settings:

1. Click the **System menu** icon  at the right side of the menu bar. Select **Settings** from the menu.
2. Click on **Tasks** in the side bar.
3. Change the [settings \[109\]](#).

The following settings are available.

- [Email notification for New, Changed, Deleted?](#)
- [Email notification for task creator](#)
- [Email notification for task participant](#)

Email notification for New, Changed, Deleted?

Specifies whether you will receive an email notification if the following is true: A task in which you participate has been re-created, changed or deleted.

Email notification for task creator

Specifies whether you will receive an email notification if the following is true: A participant accepted or declined a task created by you.

Email notification for task participant

Specifies whether you will receive an email notification if the following is true: A participant accepted or declined a task in which you participate.

9 Drive

Learn how to use the *Drive* application.

- the *Drive* components
- search and display files
- open files and show their contents
- view or play multimedia files
- create files
- organise files
- access data with WebDAV
- share files with other users or external partners
- use the *Drive* settings

How to start the *Drive* app:





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

9.1 The *Drive* Components


An introduction to the user interface can be found in [The User Interface](#).


Tool bar

Contains the following icons:

- **Add** icon . Contains the following functions:
 - **Upload new file**. Creates a [new file](#) [117].
 - **Add note**. Creates a simple [text file](#) [136].
 - **New text document**. Creates a [new text document](#) [132].
 - **New spreadsheet**. Creates a [new spreadsheet](#) [132].
- **Toggle Folder** icon . Opens or closes the [folder tree](#).
- **Toggle Search** icon . Opens an input field for [searching](#) [140] for files with a certain name.
- **View** icon . Allows selecting one of the following views for the display area:
 - [List](#)
 - [Icons](#)
 - [Square](#)




Folder tree

Displays the folders. Allows [navigation within the folder structure](#) [141]. In order to open the folder tree, click the **Toggle Folder** icon  in the tool bar. The following functions are available:

- If clicking on a folder, its files are displayed.
- The **Folder-specific actions** icon  next to the selected folder offers functions for [organising data](#) [139] and for [exchanging data](#) [151].

Function bar

The function bar in the upper part of the display area contains functions that are available in all views.

- If clicking on **Upload new file** the window for [Uploading](#) [117] a new file opens.
- If you opened a personal folder, the **Share folder** button is displayed. If clicking on this button, a [publication](#) [149] of this folder will be created.
- If the folder contains images, audio or video files, functions for [playing multimedia files](#) [116] are displayed.
- If clicking one of the icons **List** , **Icons** , **Square**  the view in the display area changes.

Display area in the *List* view

For each file a row with the following contents is displayed.

- A checkbox for selecting one or several files.
- An icon for each file in the selected folder. A file preview is displayed, if available,.
- Name and size of the file
- Date or time of the last change

If clicking on a file, a [pop-up](#) opens. It shows additional data and functions.

Display area in the *Icons* view

Displays the following information:

- Navigation path to the selected folder. To open another folder, click on the path.
- **Upload new file** button. Opens the window for [uploading \[117\]](#) a new file.
- **Share this folder** button. Creates a [publication \[149\]](#) for the selected folder.
- If the folder contains images, audio or video files, functions for [playing multimedia files \[116\]](#) are displayed.
- An icon for each file in the selected folder and a file preview, if available.

If clicking on a file, a [pop-up](#) opens. It shows further data and functions.

Display area in the *Square* view

Displays a square for each file in the selected folder. If available, a file preview is displayed. If clicking on a file, a [pop-up](#) opens. It includes additional data and functions.

Pop-up


If clicking on a file, a pop-up opens. It displays the following information:

- the **Open** button [\[115\]](#)
 - If clicking on a document, the **View** [\[115\]](#) button is displayed instead of the **Open** button.
- If clicking on an editable file, the **Edit** button [\[133\]](#) is displayed.
- the buttons **Download** [\[115\]](#), **Delete** [\[119\]](#), **Move** [\[119\]](#), **Copy** [\[119\]](#)
- If clicking on **More**, a menu with the following functions opens: **Share this file** [\[149\]](#), **Send by e-mail** [\[118\]](#), **Send as internal link** [\[118\]](#), **Show internal link** [\[118\]](#), **Add to portal** [\[119\]](#), **Rename** [\[118\]](#), **Edit description** [\[119\]](#), **Lock** [\[120\]](#).
 - **Note:** Some buttons are not displayed if you do not have the appropriate permissions.
- If clicking on a document, the **Edit as new** [\[134\]](#) button is displayed in the submenu **More**.
- file name
- a file preview, if available
- file comments
- Navigation path to the folder selected. To open another folder, click on the path.
- Buttons for uploading a [new version](#).
- The **Show version history** button. If clicking on this button, a versions list is displayed. The current version is listed on top. For each version the following information is displayed:
 - the version's file name
 - version comments, if available
 - name of the user who uploaded the version
 - date and time of the version's upload

9.2 Viewing Files

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

How to display a file:

1. Click the **View** icon  in the tool bar. Select an entry.
You can also use the icons in the [function bar](#) to select a view.
2. [Open](#) a folder in the folder tree.
3. In order to quickly find a certain file, use the [search function](#).
4. Click on a file in the display area. The data are displayed in the [pop-up](#).

9.3 Opening Files and Displaying Contents

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

- [display or download a file \[115\]](#)
- [display the contents of documents in Office file formats \[115\]](#)
- [play multimedia files \[116\]](#)

9.3.1 Displaying a file's content

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

- Plain text files or images in common file formats can be [displayed or downloaded](#) in the browser.
- You can [download](#) files and open them with suitable software.
- There are special functions available for [Documents \[115\]](#) and [multimedia files \[116\]](#).

How to display a file's content:

1. [Open](#) a folder containing files, in the folder tree.
2. Click on a file in the display area. A pop-up opens. Click on **Open**.
If having selected a document, click on **View** in the pop-up.
3. Depending on the file's content, the result varies:
 - Plain text files and images in common file formats are displayed directly in the browser.
 - Documents are displayed in the *Document Viewer* .
 - For other files a system window opens that allows downloading the file.

Tip: Learn how to download a certain file version by reading [Section 9.5.11, "Working with versions"](#).

How to download a file:

1. [Open](#) a folder containing files, in the folder tree.
2. Click on a file in the display area. A pop-up opens. Click on **Download**.
3. Complete the steps for downloading the file.

Tip: Learn how to download a certain file version by reading [Section 9.5.11, "Working with versions"](#).


9.3.2 Displaying the contents of documents

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

- Texts
- Spreadsheets
- Presentations
- PDF documents

As soon as the document is displayed, you can use additional functions e.g.: printing the document or sending it in an email.

How to display the contents of documents:

1. **Open** a folder containing documents, in the folder tree.
2. Click on a document in the display area. A pop-up opens. Click on **View**. The *Document Viewer* shows the contents of the document.
3. To browse in documents with multiple pages, use the icons on the bottom right side.
As an alternative you can use the document bar for browsing. To open the document bar, click the **Show side panel** icon on the upper right side.
To increase or decrease the document size use the icons on the bottom right side.
4. To download or print the document or to send it in an email, use the icons in the tool bar on the left side.
To edit the document, click the **Edit document** icon on the upper right side. Information on editing documents can be found in [Editing Documents](#).
5. To close the *Document Viewer*, click the **Close** icon on the right side of the Office toolbar .

9.3.3 Playing Multimedia Files


You can use the following multimedia functions:

- view images [as a slideshow](#)
- [play](#) audio files
- [play](#) video files

How to view images as a slideshow:

1. **Open** a folder with images, in the folder tree.
2. Click on **View Slideshow** in the function bar. To view the slideshow in fullscreen mode click on **Fullscreen**.

How to play audio files:

1. **Open** a folder with audio files, in the folder tree.
2. Click on **Play audio files** in the function bar. A player window opens. To play the audio files in the background, click on **Minimise**.
If you play audio files in the background, the **Play** icon  is displayed in the menubar. To display the player window again, click the icon.

How to play video files:

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

1. **Open** a folder with video files, in the folder tree.
2. Click on a video file in the display area. In the pop-up, click on **Open**. The video is played in the browser window.

9.4 Creating Files

A file includes the following components:

- one or several file versions
- an optional description

How to create a new file:

1. **Open** a folder in the folder tree.

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

2. Click the **Add** icon  in the tool bar. Click on **Upload new file**.

Tip: You can also create a new file by clicking on **Upload new file** in the function bar in the upper part of the display area.

3. In the *Upload new files* window, click on **Select file**. Select one or several files.

4. You can enter additional file information in the **Description** field.

5. Click on **Save**.

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

9.5 Managing Files

Some of the techniques for managing files require having all ready set up your own folders. Information on creating folders can be found in [Folders \(page 141\)](#).

The following options are available:

- [Sending files as a link](#)
- [Sending files as Email attachments](#)
- [Showing the link to a file](#)
- [Editing file names](#)
- [Editing descriptions](#)
- [Moving files](#)
- [Copying files](#)
- [Adding files to the portal](#)
- [Deleting files](#)
- [Editing multiple files at one time](#)
- [Locking or unlocking files](#)
- [Working with versions](#)

9.5.1 Sending files as a link

You can send a link to a file to a user. You can send links to [multiple files at once](#).

How to send a link to a file:

1. Click on a file in the display area. In the pop-up, click on **More**. Click on **Send as internal link** in the menu.
2. In the *Compose new email* page, complete the details for [sending the email \[50\]](#).

9.5.2 Sending files as Email attachments

You can send the current version as an email attachment. You can send the current versions of [multiple files at one time](#) as email attachments.

How to send the current version as an email attachment:

1. Click on a file in the display area. In the pop-up, click on **More**. Click on **Send by email** in the menu.
2. Complete all data for [sending the email \[50\]](#) on the *Compose new email* page.

9.5.3 Showing the link to a file

You can show the link to a file that is saved in the *Drive* app.

How to show the link to a file:

Click on a file in the display area. In the pop-up, click on **More**. Click on **Show internal link** in the menu.

9.5.4 Editing file names

You can edit a file name.

How to edit the file name:

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

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

9.5.5 Editing descriptions

You can edit a file's description.

How to edit a file's description:

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

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

9.5.6 Moving files

You can move a file or [multiple files at once](#) to another folder.

How to move a file:

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

1. Click on a file in the display area. In the pop-up, click on **Move**.
2. Select a folder in the *Move* window. Click on **Move**.

Tip: In order to move files using drag and drop, select the *List* view. Select a file or [multiple files](#) in the side bar. Drag the selected files to a folder in the folder tree.

9.5.7 Copying files

You can copy a file or [multiple files at once](#) to another folder.

How to copy a file:

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

1. Click on a file in the display area. In the pop-up, click on **Copy**.
2. Select a folder in the *Copy* window. Click on **Copy**.

9.5.8 Adding files to the portal

You can add a file to the portal as a portal square.

How to add a file to the portal:

Click on a file in the display area. In the pop-up, click on **More**. Click on **Add to portal** in the menu.

9.5.9 Deleting files

You can delete a single file or [multiple files at once](#).

Warning: A deleted file can not be recovered.

How to delete a file:

1. Click on a file in the display area. In the pop-up, click on **Delete**.
2. Confirm that you want to delete the file.

Result: The file will be deleted.

9.5.10 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.

You can lock or unlock a single file or [multiple files at once](#).

How to lock a file:

Click on a file in the display area. In the pop-up, click on **More**. Click on **Lock** in the menu.

How to unlock a file:

Click on a locked file in the display area. In the pop-up, click on **More**. Click on **Unlock** in the menu.

9.5.11 Working with versions

The following options are available for working with versions:

- [opening or saving a version](#)
- [uploading a new version](#)
- [setting a particular version as the current version](#)
- [deleting a version](#)

How to open or save the current version:

Click on a file in the display area. In order to open the version, click on **Open** in the pop-up. In order to save the version, click on **Download** in the pop-up.

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

How to upload a new version:

1. Click on a file in the display area. Click on **Select file** in the pop-up below *Upload new version*. Select a file.
2. Enter a version comment.
3. Click on **Upload**.

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

How to open or save a certain version:

1. Click on a file in the display area. In the pop-up, click on **Show version history**. Click on a version's name. A menu opens.
2. In order to open the version, click on the **Open** menu entry. In order to save the version, click on the **Download** menu entry.

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

1. Click on a file in the display area. In the pop-up, click on **Show version history**. Click on a version's name. A menu opens.
2. Click on the **Make this the current version** menu entry.

How to delete a certain version:

1. Click on a file in the display area. In the pop-up, click on **Show version history**. Click on a version's name. A menu opens.
2. Click on **Delete version** in the menu.

9.5.12 Editing multiple files at one time

You can execute the following functions for multiple files together:

- downloading files
- deleting files
- moving or copying files to another folder
- sharing files
- sending files by email or as an internal link
- displaying the files' internal links
- locking files

How to execute a function for multiple files together:

1. Depending on the view, you have the following options:
 - In the *List* view, check the boxes of at least two files.
 - In the *Icons* or *Square* view use your system's multi-selection functions.
2. Click on a function in the display area.

9.6 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.: Windows Explorer. You need not 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.

Prior to accessing the *Drive* app files with a file browser, e.g.: Windows Explorer, you have to set up the WebDAV access. Depending on the system software the procedure differs:

- [Setting up WebDAV under Linux](#)
- [Setting up WebDAV under Windows XP](#)
- [Setting up WebDAV under Windows Vista](#)
- [Setting up WebDAV under Windows 7](#)

9.6.1 Setting up WebDAV under Linux

How to set up WebDAV access under Linux:

1. Open the KDE Konqueror browser 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.

9.6.2 Setting up WebDAV under Windows XP

How to set up WebDAV access under Windows XP:

1. Click on **My Network Places**. In the *My Computer* window click on **My Network Places** or double-click the **My Network Places** icon on the Windows Desktop.
2. Go to *Network tasks*, open the *My Network Places* dialog window and click on **Add a network place**. A wizard for adding network resources is launched. Click on **Next**.
3. In the next dialog window select **Choose another network place**.
4. Enter the following address:
https://<adresse>/servlet/webdav.infostore
where <address> needs to be replaced by the IP address or URL of the Groupware Server.
5. Enter your username and your password for the Groupware Server.
6. In the next dialog window you can assign a name to the network resource.
Note: If you have set your encoding to ISO, please do not use any special characters for folder or document names. The groupware server uses UTF-8 encoding.
7. In the next dialog window click on **Finish**.

Result: You can use the network place to access your *Drive* app files.

9.6.3 Setting up WebDAV under Windows Vista

In order to set up the WebDAV access under Windows Vista use one of the following options:

- Use the OX Updater. Information can be found in the OX Updater user documentation.
- First, install the Microsoft [Software Update](#) for web folders. Then, set up the [WebDav access](#).

How to install the Microsoft Software Update for WebDAV:

1. Open a web browser.
2. Enter the following address: <http://support.microsoft.com/kb/907306>
3. Browse to *More Information* and click on **Download the Software Update for Web Folders package now**.
4. On the download page click on **Download**. The file Webfldrs-KB907306-ENU.exe will be downloaded.
5. Double-click on the file. The installation will be launched.

How to set up WebDAV access under Windows Vista:

1. In the Windows Explorer open **Computer**.
2. Right-click on a free area in the right pane of the Explorer. From the drop-down menu select **Add a Network Location**. The *Add network location* dialog window opens. Click on **Next**.
3. Select **Choose a custom network location**. Click on Next.
4. In the *Add network path* dialog 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.
5. Enter your username and password. Use your login data for the groupware server.
6. In the next dialog window you can assign a name to the resource.
7. In the next dialog window click on **Finish**.

Result: Below **Computer** you can access your *Drive* app files.

9.6.4 Setting up WebDAV under Windows 7

In order to set up WebDAV access under Windows 7, use one of the following options:

- Use the OX Updater. Information can be found in the OX Updater user documentation.
- First, install the Microsoft [Software Update](#) for web folders. Then, set up the [WebDav access](#).

How to set up WebDAV access under Windows 7:

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 *Internet or network address* input field 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. Use your login data for 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.

9.7 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 share files with internal users, proceed as follows:
 - Create a new personal or public folder to which you can copy or move the required files.
 - Share this folder with all users or only with certain users.

You can also share an existing folder with read or write permissions. Additional information can be found in [Permissions](#).


- To share files with external partners, proceed as follows:
 - Create a new personal or public folder and copy or move the required files.
 - Use the publish function to publish this folder.

Additional information can be found in [Publishing data](#).

- If another user has published a file folder, you can access the files by subscribing to this file folder. Further information can be found in [Subscribing to data](#).
- If another user shared a file folder with you, you can use the included files. Further information can be found in [Permissions](#).

9.8 Files Settings

How to use the files settings:

1. Click the **System menu** icon  at the right side of the menu bar. Click on **Settings** in the menu.
2. Click on **Drive** in the side bar.
3. Change the [settings \[125\]](#).

The following settings are available:

- [Default view](#)

Default view

Defines the default view for the files.

10 Documents

Learn how to work with the *Documents* app.

- The *Documents* components
- [create](#) documents
- [edit](#) documents
- [edit a document under a new name](#) [134]

In order to search for, organize or share documents with other users, use the *Drive* app [111].

How to start the *Documents* app:

Create a [new document](#) or open an [existing document](#).

10.1 The *Text* components





In the *Documents* app, the following applications are available:

- *Text* for creating and editing text
- *Spreadsheet* for creating and editing spreadsheets

10.1.1 The *Text* components

Tool bar

The tool bar is located on the left side. It contains the following icons:

- **Toggle search** icon . Displays control elements for searching for or replacing text strings.
- **Download** icon . Downloads the selected document.
- **Print** icon . Displays the current document in a print dialogue. Use the control elements in the upper part of the dialogue to print the document or to save it as a PDF file.
- **Send as mail** icon . Sends the selected document as an E-Mail attachment.

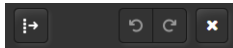
Document window

The document window is centrally located. It lets you create and edit the document's content.

Document bar

The document bar is located on the right side. It contains the following components:

- basic tools

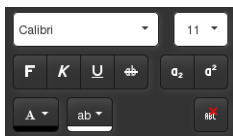


- hide the document bar
 - revert the last action
 - recover the last reverted action
 - close the document
- the document's file name

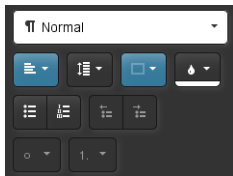
unnamed(6)

To rename the document, click on the file name.

- formatting tools



- font type and size selection
 - font formatting icons
- paragraph formatting tools



- paragraph formats
 - horizontal, vertical paragraph alignment
 - borders, fills
 - bullet lists, numbered lists
- tools for inserting objects



- create table
 - If the cursor is located in a table, the document bar shows additional tools that allow you to edit the table properties.
 - insert image
 - If a picture was selected, the document bar shows additional tools that allow you to edit the picture's properties.
 - insert hyperlink
- spell checking tools







- language selection for the document
- enabling the spellchecker

10.1.2 The *Spreadsheet* components

Tool bar

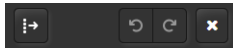
The tool bar is located on the left side. It contains the following icons:

- **Toggle search**  icon. Displays elements for searching for cell contents or for replacing cell contents.
- **Download**  icon. Downloads the selected document.
- **Print**  icon. Displays the selected document in a print window. Use the control elements on the upper part of the print window to print the document or to save it as a PDF file.
- **Send as E-Mail**  icon. Sends the selected document as an E-Mail attachment.

Document bar

The document bar is located on the right side. It contains the following elements:

- Common tools



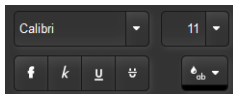
- Hide the document bar
- Revert the last action
- Restore the last reverted action
- Close the document

- The document's file name



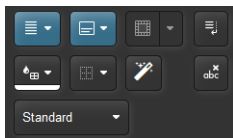
To rename the document click on the file name.

- Character formatting tools



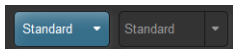
- Font type and size selection
- Font style icons

- Cell formatting tools



- Horizontal and vertical cell alignment. Merge or unmerge cells. Automatic word wrap.
- Fill color, border, copy formatting, clear formatting
- Select style

- Tools for setting number formats



- Number format. Defines the cell content's format, e.g.: number.
- Format codes. Defines the subformat, e.g.: the number of decimal places.

- Tools for rows and columns



- Insert row, delete selected rows, set the row height.
- Insert column, delete selected column, set the column width.

- Insert tools





- Calculate the sum of the selected cells, insert hyperlink, insert image

10.2 Creating Documents

You can create documents containing formatted text, tables, and images.

How to create a new document:



1. Launch the *Drive* app.
2. [Open](#) a folder in the folder tree.
Note: Open a folder for which you have the permission to create objects.
3. Click the **New** icon  in the tool bar. Click on **New text document** or on **New spreadsheet**.
4. Click on **Unnamed** in the upper right side of the document bar. Enter a name for the document.
5. Enter text or paste text from the clipboard.
6. To edit the text, use common techniques from similar applications.
To format characters or paragraphs, use the tools in the document bar.
7. Create and edit the document's content. Use common techniques from familiar Office applications.
Note the details about the [Text](#) and [Spreadsheet](#) functions.
8. To finish, click the **Close document** icon  on the right side of the document bar.

10.3 Editing Documents

When editing documents, you can do the following:

- editing text, formatting characters, formatting paragraphs
- editing spreadsheets, formatting cells, editing formulas
- downloading or printing the selected document or sending it in an email

How to edit a document:

1. Launch the *Drive* app.
2. [Open](#) a folder that contains documents in the folder tree.
Note: Open a folder for which you have the permission to create objects.
3. Click on a document in the display area. In the pop-up, click on **Edit**. The document will be opened for editing.
4. To edit the document, use common techniques from familiar Office applications.
To format characters or paragraphs or to edit cells use the tools in the document bar.
Note: All changes are immediately saved.
5. To download or print the selected document or to send it in an E-Mail, use the icons to the left side of the tool bar.
6. To search and replace text elements, click the **Toggle search** icon  on the left side of the tool bar. Control elements for searching and replacing will be shown.
7. To finish editing and to close the document, click the **Close document** icon  in the document bar on the right side.

Note: When the editing is complete, a new document [version \[120\]](#) will be created.

10.4 Editing Documents Under a New Name

You can create a new document using a copy of an existing document by editing the existing document under a new name.

How to edit a document under a new name:

1. Launch the *Drive* app.
2. [Open](#) a folder that contains documents in the folder tree.
Note: Open a folder for which you have the permission to create objects.
3. Click on a document in the display area. In the pop-up, click on **More**. Select **Edit as new**. The document will be opened for editing.
4. Click on **Unnamed** on the upper right side of the document bar. Enter a name for the document.
5. You can now use the functions for [editing a document](#).

11 Editor

Learn how to work with the *Editor* application.

- [create](#) text files
- [edit](#) text files

In order to search for text files, organise them or share them with other users, use the [Drive \[111\]](#) application.


How to launch the *Editor* app:

Create a [new text file](#) or open an [existing text file](#).

11.1 Creating Text Files

You can create text files with plain text. You can either enter the text or paste it from the clipboard.

How to create a new text file:

1. Launch the *Drive* application.
2. [Open](#) a folder in the folder tree.
Note: Open a folder for which you have the permission to create objects.
3. Click the **New** icon  in the toolbar. Click on **Add note**.
4. Enter a title.
5. Enter the text or paste text from the clipboard.
6. In order to edit the text file, use common techniques from familiar applications.
7. In order to save the text file, click on **Save**.
In order to finish, click on **Close**.

11.2 Editing Text Files

How to edit a text file:

1. Launch the *Drive* app.
2. [Open](#) a folder containing a text file in the folder tree.
Note: Open a folder for which you have the permissions to edit objects.
3. Depending on the view selected, use one of the following methods:
 - Click on a text file in the *Icons* view. Click on **Edit** in the pop-up.
 - In the *List* view, select a text file in the sidebar. Click on **Edit** in the display area.The text file will be opened for editing.
4. In order to edit the text file, use common techniques from familiar applications.
5. In order to save the text file, click on **Save**. A new version will be created.
In order to finish, click on **Close**.

12 Organising Data






Learn how to organise your data.

- Find objects by using the [search function](#).
- Work more efficiently with [folder management](#).
- Organise your teamwork by granting [permissions](#).
- Use your social network data (such as your LinkedIn data) or share information with external partners with the help of [Publish & Subscribe](#).

12.1 Searching for Objects

Use the search function to find objects like email messages or contacts with the help of a search term.

How to search for objects:

1. In order to search for E-Mail messages, go to the folder tree and [open](#) the folder that you want to browse.
In the other apps all folders are browsed by default.
2. Click the **Toggle Search** icon  in the tool bar.
3. Enter a search term. Press **Enter** or click the **Search** icon  next to the input field. The side bar displays the objects matching the search term.
Depending on the app, the **Search options** icon  is displayed next to the input field. Use the search options to find objects with matching properties.
The search options most recently used for E-Mail messages are automatically saved.
4. Use one of the following methods to reset the search result:
 - Click the **Toggle Search** icon  (in the tool bar) again.
 - Click the **Reset** icon  in the input field.

12.2 Folders

Folders help you

- keep an overview of your objects
- share information with other users and external partners
- search for certain information and quickly find the information again

Learn more about folders and how to use them:

- the [folder types](#) [141]
- navigate within the [folder structure](#) [141]
- [create](#) [142], [rename](#) [142], [delete](#) [143], and [move](#) [142] folders or subfolders.

12.2.1 Folder types

The following folder types exist in the folder tree:

- Personal folders
 - Personal folders contain your email 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 are located in *Private* in the folder tree.
 - Your personal file folder is named *My files*.
- Public folders
 - Public folders contain contacts, appointments, and documents that are of common interest to all users. Each user can create public folders and share them with other users.
 - Public folders are located in the folder tree in *Public*. Here you will find the global address book with the contact data of all users.
 - The public file folders are located in *Public files*.
- Shared folders
 - Shared folders have been shared with you by other users with read or write permission.
 - Shared folders are located in the folder tree in *Shared*.
 - Shared file folders are located in *Shared files*.

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

12.2.2 Navigating within the folder structure

The following functions are available:

- [opening](#) or [closing](#) the folder tree
- [changing](#) the folder tree width
- [opening or selecting](#) a folder in the folder tree

How to open the folder tree:

Click the **Toggle folder** icon  in the tool bar.


How to change the folder tree width:

1. Move the cursor to the right border of the folder tree. A double arrow will be displayed.
2. Drag the border to the left or to the right.

How to close the folder tree:

Click the **Toggle folder** icon  in the toolbar.

How to open a certain folder:

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

Result: The folder's content is displayed

12.2.3 Creating folders

You can create any number of subfolders in a personal folder. To create subfolders in a shared or public folder, you need to have the required [permissions \[144\]](#). Depending on the app, you can create folders or subfolders.

- In the *E-Mail* app you can create folders and subfolders.
- In the *Drive* app you can only create subfolders, not folders.
- In the *Address Book*, *Calendar*, *Tasks* apps you can only create folders, not subfolders.

How to create a new folder:

1. Depending on the app, the procedure differs:

In the *E-Mail* app click on **New folder** below the folder tree.

In the *Address Book*, *Calendar*, *Tasks* apps click on **Add private folder** or on **Add public folder** in the folder tree.


Note: In the *Drive* app you cannot create folders, only subfolders.

2. Enter a name in the *New folder* window. Click on **Add folder**.

How to create a new subfolder:

1. In the *E-Mail* or *Drive* app's folder tree [select](#) the folder in which you want to create a new subfolder.

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


2. Click the **Folder-specific actions** icon  next to the folder name. Click on **New subfolder**.
3. Enter a name in the *New folder* window. Click on **Add folder**.

12.2.4 Renaming folders

You can rename subfolders in your personal folders. For other folders you need the appropriate [permissions \[144\]](#).

How to rename a folder:

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


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

12.2.5 Moving folders

You can move subfolders from your personal folders. For other folders you need to have the appropriate [permissions \[144\]](#).

How to move a folder:

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

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


12.2.6 Deleting folders

You can delete subfolders in your personal folders. For other folders you need to have the required [permissions](#) [144].

How to delete a folder:

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

Note: To delete a folder, you need to have administrative rights for this folder.

1. In the folder tree, [select](#) the folder that you want to delete.
2. Click the **Folder-specific actions** icon  next to the folder name. Click on **Delete**.
3. Confirm that you want to delete the folder.

Result: The folder and its objects are permanently deleted.

12.3 Permissions

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

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

A description of permissions can be found in [12.3.1: Which permissions can be granted? \(page 144\)](#).

A listing of preset permissions for specific folders can be found in [12.3.2: Permissions for folders that already exist \(page 145\)](#) and in [12.3.3: Permissions for new folders \(page 145\)](#).

Information on granting permissions can be found in [12.3.4: Sharing folders \(page 146\)](#).

12.3.1 Which permissions can be granted?

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

- [Owner](#)
- [Administrator](#)
- [Author](#)
- [Guest](#)

Owner

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

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

Administrator

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

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

Author

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

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

Guest

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

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

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

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

12.3.2 Permissions for folders that already exist

You have the following permissions for folders that already exist:

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

12.3.3 Permissions for new folders

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

- in a [personal folder \[145\]](#)
- in a [public folder \[145\]](#)
- in a [shared folder \[145\]](#)

If you create a new folder in a personal folder:

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

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

- You are the **owner**.
- Other users will get no rights. You have to set the permissions for the new folder. If you then create new subfolders in this folder, the permissions for this folder are inherited by the new subfolders. Information on how to grant permissions can be found in [12.3.4: Sharing folders \(page 146\)](#).

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

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

12.3.4 Sharing folders

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

- [grant](#) rights for a folder,
- [change](#) the rights for a folder,
- grant rights by applying a [user role](#), and
- [delete](#) the rights for a folder.

Note: Consider the following restrictions:

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



You cannot share your personal *Inbox* folder. In order to grant other users access to your email messages, share an email folder that is located below your *Inbox* folder. Other users have to subscribe to this email folder. See [5.6.2: Subscribing to Email folders \(page 62\)](#).


You have the exclusive rights for your personal calendar, contacts, and tasks folders. You cannot grant administrator rights for these folders to other users. Examples for practical settings can be found in the [data organisation and teamwork questions](#).

How to grant permissions for a folder:

1. [Select](#) a folder in the folder tree.

Note: You need to have administrative rights for this folder.


2. Click the **Folder-specific actions** icon  next to the folder name. Click on **Permissions**. The *Folder permissions* window shows the current permissions for this folder.
3. At the bottom, enter a user's name. Click the  icon. The user gets the preset permissions.
4. Click on a user's permissions to change them. Example settings can be found in [questions about data organisation and teamwork](#).
5. If required, repeat these steps to grant additional permissions.
6. Click on **Save**.

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

How to change the folder permissions:

1. [Select](#) a folder in the folder tree.

Note: You need to have administrative rights for this folder.

2. Click the **Folder-specific actions** icon  next to the folder name. Click on **Permissions**. The *Folder permissions* window shows the current permissions for this folder.
3. Click on a permission to change it. Example settings can be found in [Questions about data organisation and teamwork](#).


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

4. Click on **Save**.



How to grant permissions by applying a user role:

1. [Select](#) a folder in the folder tree.

Note: You need to have administrative rights for this folder.

2. Click the **Folder-specific actions** icon  next to the folder name. Click on **Permissions**. The *Folder permissions* window shows the current permissions for this folder.
3. Click on **Apply role** next to a username. Select a [User role \[144\]](#) from the menu.
4. Click on **Save**.

How to remove a user's folder permissions:

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

12.4 Publish&Subscribe

Publish and subscribe helps you use social network data or share specific data with external partners. The following options are available:

- Import contacts from social networks or data published by other users by [subscribing](#) to that data.
- Share the data from a contacts or documents folder with other users and external partners by [publishing](#) the contact or document folder.
- Keep an overview of your subscribed and published data by [managing](#) them on a common overview page.


12.4.1 Subscribing to data


You have the following options:

- [Subscribe](#) to contacts from social networks. In order to use this function you need to have set up an account containing your access data for the social network. Further information can be found in [Subscribing to data \(page 148\)](#)
- [Subscribe](#) to appointments from your Google calendar.
- Subscribe to other users' data using an [email invitation](#)
- [Refresh](#) subscribed data
- Disable, enable, change or delete a subscription. Information can be found in [Managing subscribed and published folders \(page 150\)](#)


How to subscribe to data from a social network:

Prerequisite: You have set up an account with the credentials that you use for the data source.

1. Select a private contacts folder in the *Address Book* application.
2. Click the **Folder-specific actions** icon  next to the folder name. Click on **New subscription**.
3. The *Subscribe* window opens. Specify the data to subscribe to:
 - Select the data source from the *Source* drop down field.
 - Select the account for the data source from the *Account* drop down field.
4. If the subscribed data should go into a new folder, enable **Add new folder for this subscription**.
5. Click on **Subscribe**. The data is imported. This can take a while.

Tip: A folder with subscribed data is marked with the **Cloud** icon . If clicking the icon, the *Publications and Subscriptions* settings are opened.

How to subscribe to appointments from your Google calendar:

1. Select a private calendar folder in the *Calendar* application.
2. Click the **Folder-specific actions** icon  next to the folder name. Click on **Subscribe**.
3. In the *Subscribe* window, select the data to subscribe to:
 - Select the data source from the *Source* drop down field.
 - Enter the username and password for your Google account.
4. If the subscribed data should go into a new folder, enable **Add new folder for this subscription**.
5. Click on **Subscribe**. The data will be imported. This might take a while.


How to subscribe to data using an email invitation:

Prerequisite: A user has published a folder and sent you an email invitation. This email invitation contains a note and the **Subscribe** button.

1. Select an E-Mail with a subscription invitation in the *E-Mail* application.
2. Click on **Subscribe to this publication** below *Someone shared a folder with you* in the display area.

How to refresh subscribed data:

Together with the objects, subscribed data is refreshed in regular intervals. You can also manually refresh subscribed folder data.

1. Click the **System menu** icon  on the right side of the menu bar. Click on **Settings** in the menu.
2. Click on **Publications and Subscriptions** in the side bar.
3. Click on **refresh** next to a subscription in the display area.

12.4.2 Publishing data

Privacy

When using the publishing feature, you, as the current owner of this data, are responsible for being careful with privacy rules and for complying with legal obligations (Copyright and Privacy Laws).

You are the responsible party, according to the Federal Data Protection Act (BDSG, Germany) or your country's Privacy Acts, especially when publishing personal data.


According to European and other national regulations, you, as the responsible party, are in charge of data economy, and must not publish or forward personal data without the person's consent.


Beyond legal obligations, Open-Xchange would like to encourage extreme care when dealing with personal data. Please carefully consider where you store and to whom you forward personal data. Please ensure appropriate access protection, e.g.: by proper password protection.

If you publish data using the publish function, other users or external users can use that data. You can do the following:

- [Publishing an address book's or a files folder's content](#)
- [Publishing a single file](#)
- Enabling, disabling, or deleting a publication. Information can be found in [Managing subscribed and published folders \(page 150\)](#)

How to publish an address book's or files folder's content:

1. Launch the *Address Book* or *Drive* app.
2. **Select** the file folder containing the content to be published in the folder tree.
3. Click the **Folder-specific actions** icon  next to the folder name. Click on **Share this folder**.
In the *Drive* app you can also click on **Share folder** in the function bar.
4. Set a publication name in the *Share folder* window. You can use the following options:
 - Select a template to set the content and display of the data published.
 - Send an email with the access data by enabling **Share Link by email**.
5. In order to finish the process, click on **Share**.

Tip: A folder with published data is marked with the **Cloud** icon . If clicking the icon, the *Publications and Subscriptions* settings are opened.

How to publish a single file:


1. How to launch the *Drive* app.
2. [Open](#) a folder with files, in the folder tree.
3. Click on a file in the display area. In the pop-up, click on **Share**.
4. In the *Share file* window, you can send an email with the access data by activating **Share link by email**.
To complete the process click on **Share**.


12.4.3 Managing subscribed and published folders

In order to get an overview of your subscribed and published data and to manage the data you can:


- [display](#) all subscriptions or publications
- [activate or deactivate](#) subscriptions or publications
- [edit](#) the settings of a publication or subscription
- [remove](#) subscriptions or publications

How to display all subscriptions or publications:


1. Click the **System menu** icon  in the menu bar. Click on **Settings** in the menu.
2. Click on **Publications and Subscriptions** in the side bar.
3. Use the following functions to view more details:
 - To show the publication's or subscription's folder, click on the navigation path below the publication's or subscription's name.
 - To show a web page with the publication, click on the link below the publication name.

Tip: You can only view information for a specific folder. To do so, click the **Publication and Subscriptions** icon  next to a folder with a publication or subscription in the folder tree.



How to disable or enable publications or subscriptions:

1. Click the **System menu** icon  on the right side of the menu bar. Click on **Settings** in the menu.
2. Click on **Publications and Subscriptions** in the side bar.
3. Click on **Disable** or **Enable** in the display area next to a publication or subscription.

How to edit the settings of subscriptions or publications:

1. Click the **System menu** icon  on the right side of the menu bar. Click on **Settings** in the menu.
2. Click on **Publications and Subscriptions** in the side bar.
3. Click on **Edit** next to a publication or subscription in the display area.
4. Change the settings. To complete the process, click on **Publish** or on **Subscribe**.

How to remove publications or subscriptions:

1. Click the **System menu** icon  on the right side of the menu bar. Click on **Settings** in the menu.
2. Click on **Publications and Subscriptions** in the side bar.
3. Click the **Delete** icon  in the display area next to a publication or subscription.

13 Exchanging Data

Learn how to exchange data with other applications.

- You can [import](#) appointments, tasks, and contacts created with other applications.
- You can [export](#) appointments, tasks, and contacts.

13.1 Importing Data

The import functions allow importing data created in other applications. You can do the following:

- Importing appointments and tasks in iCal format
- Importing contacts in the vCard format
- Importing contacts in the CSV format

13.1.1 Importing appointments and tasks in iCal format

The following information will help you successfully import data in iCal format:

- Which iCal objects are imported?
- Which iCal object properties are not supported?
- Accomplishing an iCal import

13.1.1.1 Which iCal objects are imported?

A description of all iCal objects can be found in the document [RFC2445](http://tools.ietf.org/html/rfc2445) [<http://tools.ietf.org/html/rfc2445>].

The following table shows which iCal objects are imported and which are not. The information in the columns "Appointments" and "Tasks" have the following meaning:

- "X" means the object is imported. The object value is set in RFC2445.
- A number like "255" means the object is imported. The number indicates the maximum number of characters.
- The entry "unlimited" means the object is imported. There is no limit to the maximum number of characters.
- The entry "-" means the object is not imported.

Category	iCal object	Appointments	Tasks
Calendar Properties	CALSCALE	-	-
	METHOD	-	-
	PRODID	X	X
	VERSION	X	X
Calendar Components	VALARM	X	X
	VEVENT	X	X
	VFREEBUSY	-	-
	VJOURNAL	-	-
	VTIMEZONE	X	X
	VTODO	X	X
Component Properties	ATTACH	-	-
	ATTENDEE	X	X
	CATEGORIES	X	X
	CLASS	X	X
	COMMENT	-	-
	COMPLETED	-	X
	CONTACT	-	-
	CREATED	X	X
	DESCRIPTION	Unlimited	Unlimited
	DTEND	X	X
	DTSTAMP	X	X
	DTSTART	X	X
	DUE	X	X
	DURATION	X	X
	EXDATE	X	-
	EXRULE	-	-
	FREEBUSY	-	-
	GEO	-	-
	LAST-MODIFIED	-	-
	LOCATION	255	-
ORGANIZER	-	-	
PERCENT-COMPLETE	-	X	
PRIORITY	-	X	

Category	iCal object	Appointments	Tasks
	RDATE	-	-
	RECURRENCE-ID	-	-
	RELATED-TO	-	-
	REPEAT	-	-
	REQUEST-STATUS	-	-
	RESOURCES	X	-
	RRULE	X	X
	SEQUENCE	-	-
	STATUS	-	X
	SUMMARY	255	255
	TRANSP	-	X
	TRIGGER	X	X
	TZID	X	X
	TZNAME	X	X
	TZOFFSETFROM	X	X
	TZOFFSETTO	X	X
	TZURL	X	X
	UID	X	X
	URL	-	-
Property Parameters	CUTYPE	X	X
	DELEGATED-FROM	-	-
	DELEGATED-TO	-	-
	DIR	-	-
	ENCODING	X	X
	FMTTYPE	-	-
	FBTYPE	-	-
	LANGUAGE	-	-
	MEMBER	-	-
	PARTSTAT	-	-
	RANGE	-	-
	RELATED	-	-
	RELTYPE	-	-
	ROLE	-	-

Category	iCal object	Appointments	Tasks
	RSVP	-	-
	SENT-BY	-	-
	TZID	X	X
	VALUE	X	X

13.1.1.2 Which iCal object properties are not supported?

Be aware of the following restrictions.


- Appointments such as "The last Sunday of a month" are supported. Appointments with days counted from the end of the month are not supported. Example: The second last Sunday of a month. If an appointment includes such information the appointment is not imported.
- Alarm repetition is not supported. Example: "Remind me four times". If an appointment contains such information that information is ignored.

13.1.1.3 Accomplishing an iCal import

Make note of the following when importing iCal data.

- Make sure the file you want to import contains correct iCal data.

How to import appointments or tasks in the iCal format:

1. Launch the *Calendar* or *Tasks* application.
2. **Select** the folder for importing appointments or tasks to in the folder tree.
3. Click the **Folder-specific actions** icon  next to the folder name. Click on **Import**.
4. Click on **Select file** in the *Import into* window. Select a file in iCal format.
5. Click on **Import**.


Result: The appointments or tasks are added to the folder.

13.1.2 Importing contacts in the vCard format

Note the following when importing vCard data.

- 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.

How to import contacts in vCard format:

1. Launch the *Address Book* app.
2. **Select** the folder for importing the contacts to in the folder tree.
3. Click the **Folder-specific actions** icon  next to the folder name. Click on **Import**.
4. Select the *vCard* format in the *Import into* window. Click on **Select file**. Select a file in the vCard format.
5. Click on **Import**.

Result: The contacts are added to the folder.


13.1.3 Importing contacts in the CSV format

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 the assignment in your configuration. Further information is provided by your administrator or hosting provider.

How to import contacts from a CSV file:

1. Launch the *Address Book* app.
2. **Select** the folder for importing the contacts to in the folder tree.
3. Click the **Folder-specific actions** icon  next to the folder name. Click on **Import**.
4. Select the data format. Click on **Import**.

Result: The contacts are added to the folder.

13.2 Exporting Data

With the Export function you can export certain data to a file for use with other programs. You can export the following data:

- Contacts in the following formats:
 - CSV
 - vCard
 - hCard
- Appointments in the following formats:
 - iCalendar
- Tasks in the following formats:
 - iCalendar

Those formats are standardised and can be imported by many other programs. You can do the following:


- [exporting](#) a folder's data.

13.2.1 Exporting folder data

You can export the following objects:

- Contacts in a personal or public contacts folder.
- Appointments in a personal or public calendar folder
- Tasks in a personal or public tasks folder.

How to export a folder's objects:

1. [Select](#) a personal or public folder in the folder tree.
2. Click the **Folder-specific actions** icon  next to the folder name. Click on **Export**.
3. Select a data format. Click on **Export**.

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General questions

Where can I find my personal data and settings?

You can customise the following data and settings:

- Your password for accessing the groupware can be found in the groupware settings.
- Learn how to [change your personal data](#).
- Learn how to [customise the basic settings](#).
- Learn how to [set up additional email accounts \[64\]](#).

How can I change my password?


In order to change your password, click on **My password** in the *User data* square in the *Portal* app. Learn more from these [instructions](#).

Why can particular buttons or input fields not be found?

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

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

How am I notified of new email messages or appointment invitations?

If there are new email messages or appointment notifications, the *Unread Badge* icon  to the right side of the menu bar shows the number of new objects. Click the icon to open the *Notification Area*. It contains information about the new objects. From there you can also di-

rectly activate functions, e.g.: read a new email or confirm a new appointment. More information can be found in [The User Interface](#).

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

In the *Portal* app you can read current messages from your social networks or from news pages or view photos of specific web pages by [adding](#) squares with 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...**, **Copy to...** or **Blind copy to...**. 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 email messages to the same group of people, create a distribution list in the *Address Book* app and add the email addresses to the distribution list. Information can be found in [Creating Distribution Lists \(page 74\)](#).

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

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

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

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 \(page 56\)](#).

Can I e.g.: access email messages sent to my Google Mail account?

For many email service providers you can set up external email accounts, e.g.: for Google Mail. You only need your account data for the respective provider. As soon as you set up the external email account you have access to the email messages from within the folder tree. Information can be found in [E-Mail Accounts \(page 64\)](#).

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 \(page 52\)](#).

How to keep an overview of my Email account inboxes??

Use Unified Mail to display the inboxes of multiple email accounts in a central folder. Information can be found in [Using Unified Mail \(page 59\)](#).

How can I use the conditions in email filter rules?

You can create a condition by

- selecting an email component, e.g. "Subject";
- selecting a criterion, e.g. "Is exactly";
- entering an argument, e.g. "protocol".

In this case it would be verified whether the subject of an email exactly matches the argument's characters ("protocol"). You can control if the condition is met with the criterion and the character string. The differences between the individual criteria will be explained in the examples below. In the examples, the subject is used for filtering email messages.

- Criterion: "contains"
The condition is met if the subject contains the characters in the argument.
Example: The argument is "protocol".
The condition is met for the subject "protocol".
The condition is also met for the subject "meeting protocol".
- Criterion: "is exactly"
The condition is met if the subject exactly matches the argument's character string.
Example: The argument is "protocol".
The condition is met for the subject "protocol".
The condition is not met for the subject "meeting protocol".
- 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 "protocol*". The "*" character is a wildcard for any characters.
The condition is met for the subject "protocol update".
The condition is not met for the subject "meeting protocol".
- 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 Internet. 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 "organization".
The condition is also met for the subject "organisation".
The condition is not met for the subject "Organic".

How can I use the contacts from my social networks?

You can use the contacts from your social networks like Facebook, LinkedIn or Xing by subscribing to the contacts. Information can be found in [Subscribing to data \(page 148\)](#).

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 create a task from an email?

Use the *Reminder* function in the display area of the *E-Mail* app. More information can be found in [Enabling an email reminder \(page 56\)](#).

How can I organise another person's appointments as their 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 availability function, e.g.: Free, Busy, Absent etc?

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

How do I use the calendar or tasks recurrence settings?

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

Starts on 07-01-2013

Daily

The event is repeated every 2 days.

The series ends after 5 appointments or tasks.

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

Starts on 08-01-2013

Weekly

The event is repeated every week on Tuesday and Friday.

The series never ends.

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

Starts on 09-01-2013

Weekly

The event is repeated every 2 weeks on Wednesday.

The series ends on 27-03-2013.

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

Starts on 04-02-2013

Monthly

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

The series ends after 12 appointments.

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


Starts on 29-11-2013

Yearly

The event is repeated every last Friday in November.

The series never ends.

How to find free time periods when creating appointments?

Click on **Find a free time period** when creating an appointment or click the **Scheduling** icon  in the tool bar. Information can be found in [Scheduling appointments with several participants \(page 95\)](#).

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 book contacts or to your social network contacts (e.g.: LinkedIn). 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 folder.
3. Publish this contacts folder. Information can be found in [Publishing data \(page 149\)](#).

How can I share specific documents with my external partners?

You can share the contents of document folders with external partners. You can proceed as follows:

1. In the *Drive* app, you can collect the documents in a separate folder.
2. Publish this folder. Information can be found in [Publishing data \(page 149\)](#).

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

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

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

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

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

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

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

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

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

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

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

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