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 host. As the groupware's software has a modularised structure consisting of individual applications, it is possible to purchase additional applications or functions through upgrades.

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:

Information can be found in 5.4: Sending email messages (page 51).

Explanatory text

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

Example:

The following options are available:

- 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 reply to an E-Mail:

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

1.4 Terminology

This documentation uses the following terms.

OX App Suite	The software described in this documentation. *Groupware* is used as a synonym in the documentation.
App	An application is a component that provides certain functions. Example: With the *E-mail* application you can send, receive and organise E-Mail 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 on-line 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* oder *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 E-Mail messages.

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

Learn more [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 the contacts from your social networks. This enables you to use the groupware as a central collection point for your contacts.
- Work with external partners by sending contact data in vCard format or sharing contact folders.

Learn more [71].

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 the iCal functions ensure automated invitation management.

Learn more [87].

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 [107].

Simple Pad

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 tho share them with users and external partners.

Learn more [139].

Files

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 E-Mail attachments or links.
- Provide information to external partners by sharing document folders.

Learn more [121].

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 E-Mail messages, contacts, appointments, tasks, and Infostore items.
- Support your team by sharing certain folders with read or write access.
- Benefit from the information of others by using objects in public or shared folders for your work.
- The social functions in the groupware also make use of folders for collecting or sharing information with external partners.

Learn more [143].

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

- Microsoft Internet Explorer 10, 11
- Mozilla Firefox, latest version
- Apple Safari Mac OS X 6.0
- 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

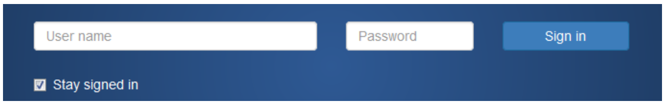
Information on these techniques can be found in your operating system documentation.

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.



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

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

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

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

3 First Steps

What you should do initially.

- Get familiar with the common user interface.
- Get familiar with the keyboard input.
- Customise the basic settings.
- Check your personal contact data. Change or complete it, if required.
- For security reasons you should change your password.
- In order to access social network contacts (e.g.: Facebook contacts) you need to set up accounts for social networks.
- In order to access your groupware data from local clients, you can install clients for workstations or mobile devices.

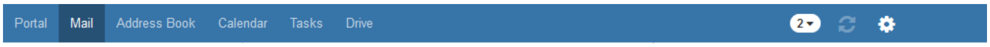
3.1 The User Interface

The user interface includes the following components:

- A menu bar on the top.
- On the left side below the menu bar the search bar is displayed. It can be enabled or disabled together with the folder tree.
- The Folder tree can be activated on the left side.
- On the right side below the menu bar a tool bar is displayed. It contains app specific functions and functions for selecting the view in the display area.
- The remaining space is used for the display area.
- Depending on the action executed, the pop-up window or the notification area will overlap the display area.
- Text that can be clicked is displayed in blue.
- You can also use the keyboard [31] to access the user interface functions.

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

Menu bar

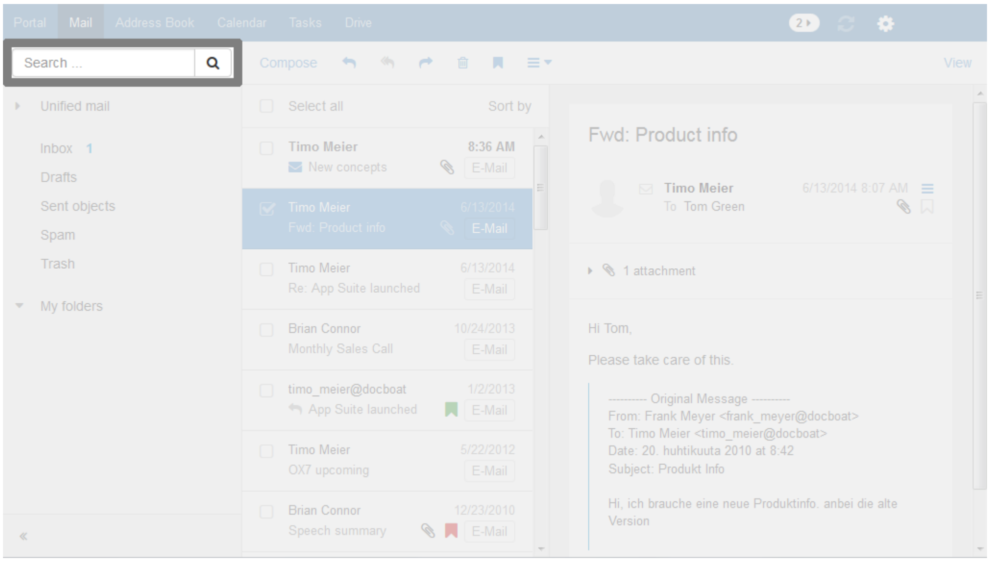


Contains the following icons and buttons:

- 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 E-Mail 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.
  - *My contact data*. Opens a window where you can adjust your personal contact data in the global address book.
  - *Help*. Opens the online help.
  - *Fullscreen*. Switches to fullscreen mode or back to windowed mode.
  - *Sign out*. Signs you out from the groupware.

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

Search bar


Portal
Mail
Address Book
Calendar
Tasks
Drive
2
Search ...
Compose
View
Unified mail
Inbox 1
Drafts
Sent objects
Spam
Trash
My folders
«
Select all
Sort by

Timo Meier 8:36 AM
New concepts E-Mail

Timo Meier 6/13/2014
Fwd: Product info E-Mail

Timo Meier 6/13/2014
Re: App Suite launched E-Mail

Brian Connor 10/24/2013
Monthly Sales Call E-Mail

timo_meier@docboat 1/2/2013
App Suite launched E-Mail

Timo Meier 5/22/2012
OX7 upcoming E-Mail

Brian Connor 12/23/2010
Speech summary E-Mail

Fwd: Product info

Timo Meier 6/13/2014 8:07 AM
To Tom Green

1 attachment

Hi Tom,

Please take care of this.

---------- Original Message ----------
From: Frank Meyer <frank_meyer@docboat>
To: Timo Meier <timo_meier@docboat>
Date: 20. huhtikuuta 2010 at 8:42
Subject: Produkt Info

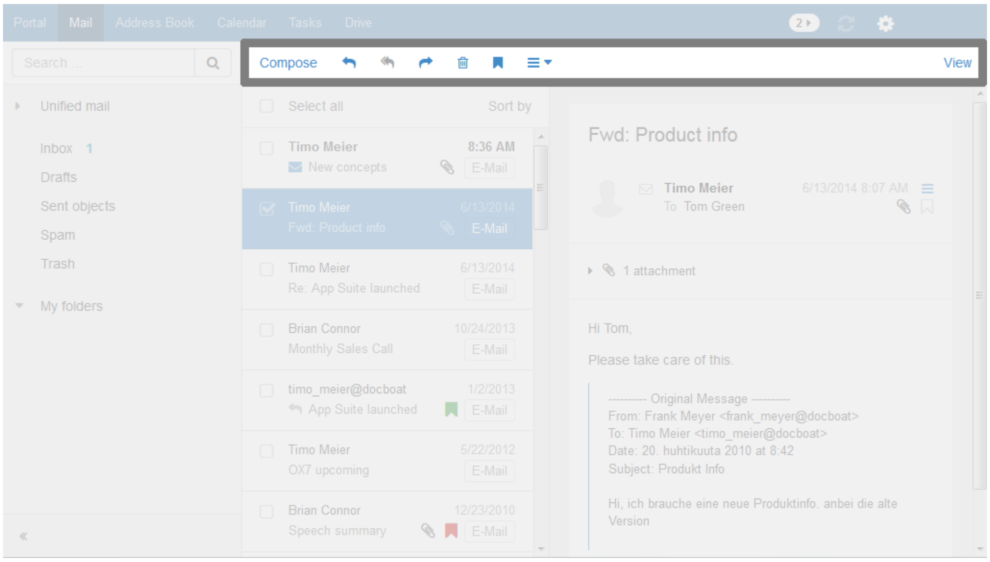
Hi, ich brauche eine neue Produktinfo. anbei die alte Version

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

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

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

Tool bar


Portal
Mail
Address Book
Calendar
Tasks
Drive
2
Search ...
Compose
View
Unified mail
Inbox 1
Drafts
Sent objects
Spam
Trash
My folders
Select all
Sort by
E-Mail

Timo Meier 8:36 AM New concepts

Timo Meier 6/13/2014 Fwd: Product info

Timo Meier 6/13/2014 Re: App Suite launched

Brian Connor 10/24/2013 Monthly Sales Call

timo_meier@docboat 1/2/2013 App Suite launched

Timo Meier 5/22/2012 OX7 upcoming

Brian Connor 12/23/2010 Speech summary

Fwd: Product info

Timo Meier 6/13/2014 8:07 AM
To: Tom Green

1 attachment

Hi Tom,

Please take care of this.

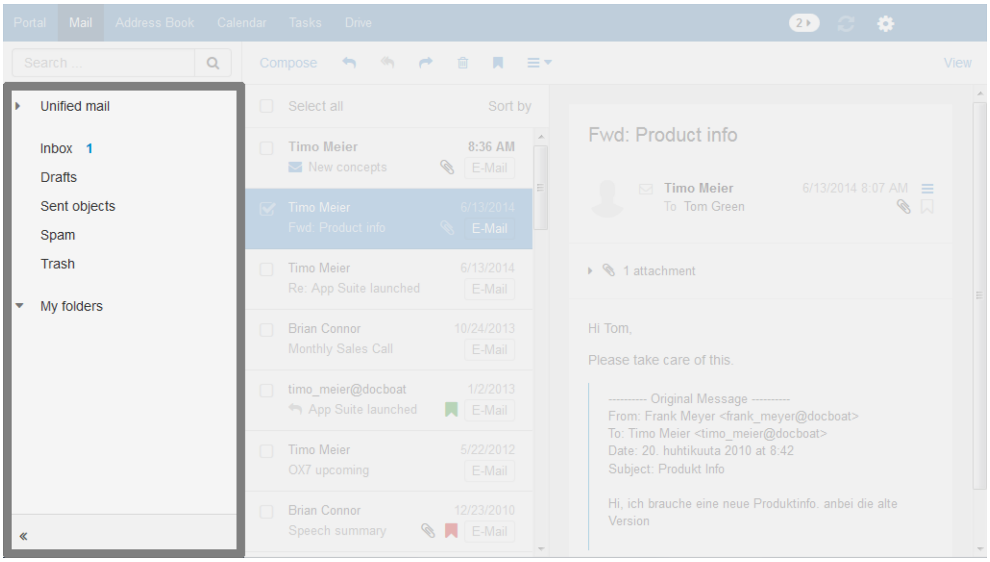
---------- Original Message ----------
From: Frank Meyer <frank_meyer@docboat>
To: Timo Meier <timo_meier@docboat>
Date: 20. huhtikuuta 2010 at 8:42
Subject: Produkt Info

Hi, ich brauche eine neue Produktinfo. anbei die alte Version

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

- Buttons for creating new objects, e.g. a new E-Mail or a new contact.
  If you do not have the permissions to create objects in the current folder, the button is disabled.
- Buttons or icons for editing objects.
- Depending on the app, additional app specific buttons or icons might be available.
- *More* icon ≡ ▾ . Contains app specific functions for organising objects.
- *View* button. Contains functions for controlling the layout in the display area and for opening or closing the folder tree.

Folder tree


Portal
Mail
Address Book
Calendar
Tasks
Drive
2
Search ...
Compose
View
Unified mail
Inbox 1
Drafts
Sent objects
Spam
Trash
My folders
«
Select all
Sort by
Timo Meier 8:36 AM
New concepts E-Mail
Timo Meier 6/13/2014
Fwd: Product info E-Mail
Timo Meier 6/13/2014
Re: App Suite launched E-Mail
Brian Connor 10/24/2013
Monthly Sales Call E-Mail
timo_meier@docboat 1/2/2013
App Suite launched E-Mail
Timo Meier 5/22/2012
OX7 upcoming E-Mail
Brian Connor 12/23/2010
Speech summary E-Mail
Fwd: Product info
Timo Meier 6/13/2014 8:07 AM
To Tom Green
1 attachment

Hi Tom,

Please take care of this.

---------- Original Message ----------
From: Frank Meyer <frank_meyer@docboat>
To: Timo Meier <timo_meier@docboat>
Date: 20. huhtikuuta 2010 at 8:42
Subject: Produkt Info

Hi, ich brauche eine neue Produktinfo. anbei die alte Version

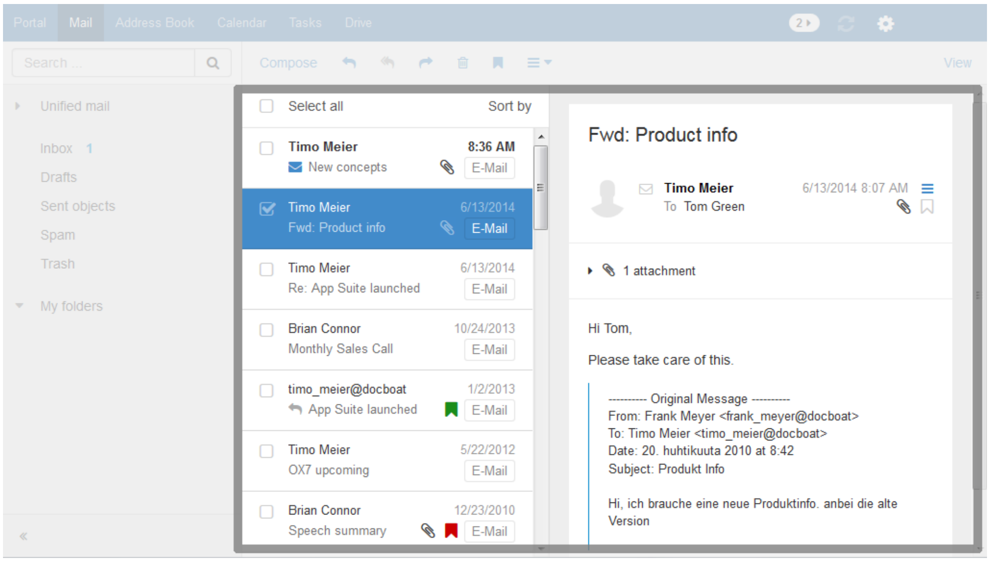
In order to display the folder tree, click on **View** in the function bar. Enable **Folder view**. The following information is displayed in the folder tree:

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

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

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

Display area


Portal
Mail
Address Book
Calendar
Tasks
Drive
2
Search ...
Compose
View
Unified mail
Inbox 1
Drafts
Sent objects
Spam
Trash
My folders
«
Select all
Sort by

Timo Meier 8:36 AM
New concepts E-Mail

Timo Meier 6/13/2014
Fwd: Product info E-Mail

Timo Meier 6/13/2014
Re: App Suite launched E-Mail

Brian Connor 10/24/2013
Monthly Sales Call E-Mail

timo_meier@docboat 1/2/2013
App Suite launched E-Mail

Timo Meier 5/22/2012
OX7 upcoming E-Mail

Brian Connor 12/23/2010
Speech summary E-Mail

Fwd: Product info

Timo Meier 6/13/2014 8:07 AM
To Tom Green

1 attachment

Hi Tom,

Please take care of this.

--------- Original Message ---------
From: Frank Meyer <frank_meyer@docboat>
To: Timo Meier <timo_meier@docboat>
Date: 20. huhtikuuta 2010 at 8:42
Subject: Produkt Info

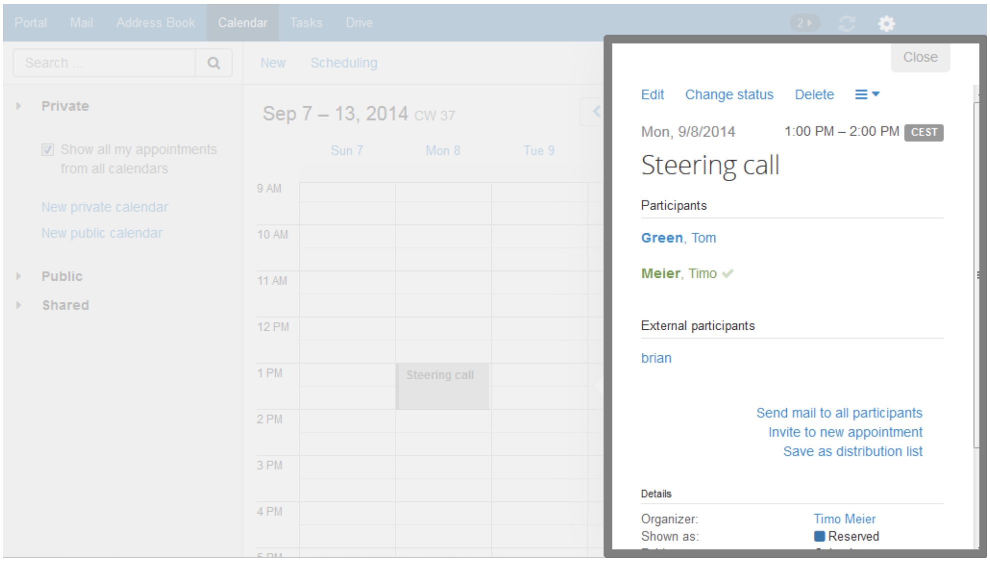
Hi, ich brauche eine neue Produktinfo. anbei die alte Version

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

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

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

Pop-up


Portal
Mail
Address Book
Calendar
Tasks
Drive
Search ...
New
Scheduling
Private
Show all my appointments from all calendars
New private calendar
New public calendar
Public
Shared
Sep 7 – 13, 2014 CW 37
Sun 7
Mon 8
Tue 9
9 AM
10 AM
11 AM
12 PM
1 PM
2 PM
3 PM
4 PM
Steering call
Close
Edit
Change status
Delete
Participants
External participants
Send mail to all participants
Invite to new appointment
Save as distribution list
Details

Mon, 9/8/2014 1:00 PM – 2:00 PM CEST

Steering call

Participants

Green, Tom

Meier, Timo ✓

External participants

brian

Organizer: Timo Meier

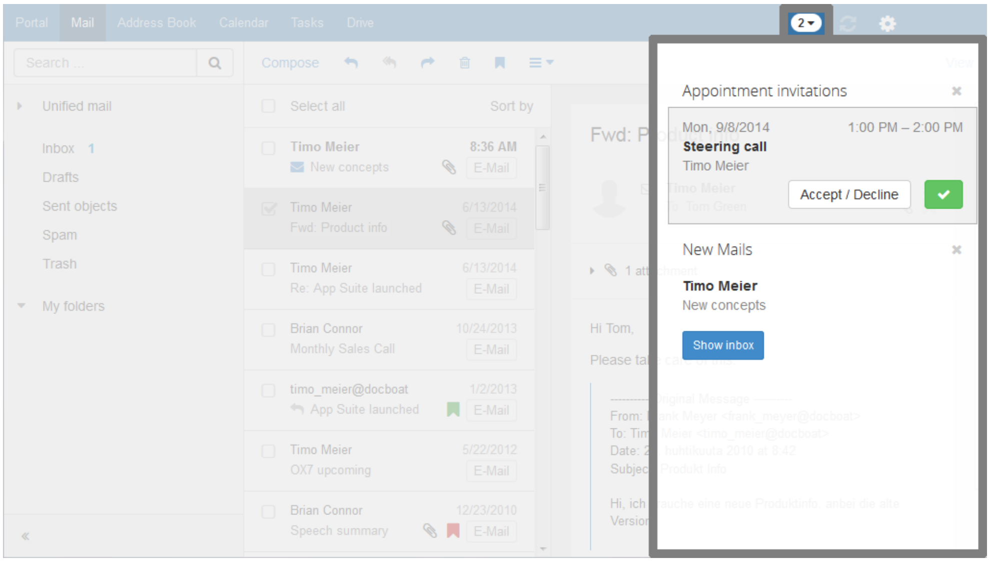
Shown as: Reserved

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

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

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

Notification area


Portal
Mail
Address Book
Calendar
Tasks
Drive
2
Search ...
Compose
Unified mail
Inbox 1
Drafts
Sent objects
Spam
Trash
My folders
Select all
Sort by
Accept / Decline
Show inbox

Appointment invitations

Mon, 9/8/2014 1:00 PM – 2:00 PM
Steering call
Timo Meier

New Mails

Timo Meier
New concepts

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. You can do the following:

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

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

3.2 Keyboard Input

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

- To switch between the menu bar, the folder tree, the side bar, and the display area, use [Ctrl]+[F6] on Windows and Linux systems, [F6] on MacOS systems.
- 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 left or right arrow key.
- 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. The selected element will be highlighted.

  With [Shift]+[Tab] you can select elements in reverse order.
- To execute the function selected, press [Enter].
- To enable or disable a selected checkbox, press the [Space bar].
- To toggle the checkboxes, use the cursor keys.
- To close a pop-up or cancel a dialogue window, press [Esc].
- To delete the selected E-Mail messages,press [Del] or [Backspace].

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:

   Repeatedly press [Ctrl]+[F6] or [F6] on Mac OS systems 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 **Compose** button is highlighted. Press [Enter]. The *Compose new e-mail* page opens. The input field *To:* is enabled.
3. Enter the recipient's E-Mail address. Press [Enter].
4. Press [Tab]. The input field *Subject* is enabled. Enter the subject.
5. The input field for the E-Mail text is enabled. Enter the E-Mail text.
6. In order to send the E-Mail, press [Tab]. The **Send** button is highlighted. Press [Enter]. The E-Mail is sent.
7. To add attachments, repeatedly press [Tab] until the **Add attachment** function is highlighted. Press [Enter].

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

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

How to use the keyboard to reply to an email:

1. If the *Email* app is not launched, do the following:
   Repeatedly press [Ctrl]+[F6] or [F6] on Mac OS systems 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] or [F6] on Mac OS systems to highlight a folder in the folder tree. Use the cursor keys to select the desired folder. To view or hide a subfolder, use the left or right arrow key.
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 E-Mail, repeatedly press [Tab] or [Shift]+[Tab] , until the **Reply to sender** 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⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Basic settings** in the side bar.
3. Change the settings [33].

The following settings are available.

- Language
- Time zone
- Refresh interval
- Theme
- Default app after sign in
- Automatic sign out
- Automatic opening of notification area
- High contrast theme
- 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 app after sign in

Defines the application that is displayed after login.

Automatic sign out

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

Automatic opening of notification area

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

High contrast theme

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

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. Click on **My contact data** in the menu.
2. Change the data. Click on **Save**.

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

3.5 Changing the Password

How to change your password:

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

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

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

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

3.6 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 the **Settings** menu item.
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.

Tip: You can also use the Portal Widgets [42] to set up an account for accessing social networks.

3.7 Installing Clients for Workstations or Mobile Devices

You can install the following clients from within the groupware:

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

How to install clients for workstations or mobile devices:

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

4 Portal

Learn how to work with the *Portal* application.

- The *Portal* Components
- customise the contents

How to launch the *Portal* app:

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

4.1 The *Portal* Components

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

Signed in as

Displays the username that you used for signing in.

Add widget button

Clicking on this opens a menu that allows adding [42] new widgets.

Customise this page button

Clicking on this displays a page that allows customizing [42] the Portal.

***Appointments* widget**

Displays your current appointments. You can do the following:

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

***Inbox* widget**

Displays new email messages. You can do the following:

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

***Tasks* widget**

Shows unfinished tasks. You can do the following:

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

***Recently changed files* widget**

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

***User data* widget**

Includes links for the following functions:

- Changing your personal contact data
- Changing your password

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

***Quota* widget**

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

***News* widgets**

Display current messages from different message sources:

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

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

Widgets with *news from your social networks*

Those widgets display information from your social networks like Facebook, Twitter, LinkedIn, XING.

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

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

Widgets with information about OX Drive clients

Depending on the server configuration, there are widgets displayed that contain information on the installation of OX Drive clients. Additional information can be found in the OX Drive client user guide.

4.2 Customising the Portal

The following options exist:

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

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

4.2.1 Changing the widgets' order

You can define the order of the widgets.

How to change the order of the widgets:

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

4.2.2 Removing Portal widgets

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

How to remove a widget:

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

4.2.3 Adding Portal widgets

You can extend the existing widgets by adding new ones.

How to add new widgets:

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

Tip: In the *Files* app you can add a file as a portal widget.
Tip: In the *E-mail* app you can add a Portal widget.

4.2.4 Adding a Portal widget for social networks

The following options are available:

- In order to access information and functions of your social networks e.g., XING, LinkedIn or Facebook, you can add widgets for social networks.
- If you do not have a XING account, you can use a widget to create a new XING account.

How to add a widget for accessing social networks:

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

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

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

4.2.5 Changing the Portal widgets' settings

How to use the Portal widgets settings:

1. Click the **System menu** icon⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Portal** in the side bar.
3. Change the settings [43].

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

The following settings are available.

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

Edit button

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

Colour button

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

Disable button

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

Delete icon

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

Only show widget summary on mobile devices checkbox

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

5 E-mail

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

- The *E-mail* Components
- display E-Mail messages
- send email messages
- manage email messages
- search for E-Mail 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 launch 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.

Folder tree

Displays the E-Mail folders and enables you to navigate the folder structure [144]. In order to open the folder tree, click on the **View** button in the tool bar. Enable **Folder view**. The following functions are available:

- To display the number of E-Mail messages in a folder, hover over the folder name. A tool tip shows the number of E-Mail messages.
- If clicking on a folder its email messages are displayed.
- The **Folder-specific actions** icon☰ next to the selected folder offers functions for organising data [143] and app specific folder functions.
- Below the folders there is a button for Adding E-Mail accounts [66].

Tool bar

Contains the following icons and buttons:

- **Compose** button. Creates a new E-Mail [51].
- **Reply to sender** icon↩ . Sends a reply [52].
- **Reply to all recipients** icon↩ . Sends a reply to all recipients [52].
- **Forward** icon↪ . Forwards the E-Mail to other recipients [52].
- **Delete** icon 🗑 . Deletes [58] the E-Mail selected by you.
- **Set colour** icon⚐ . Opens a menu allowing you to assign a coloured label [56] to the E-Mail.
- **More** icon☰▾ . Opens a menu with the following entries: **Mark as unread**, **Mark as read** [56], **Move** [55], **Copy** [55], **Print** [58], **Save as file** [58], **View source** [57], **Reminder** [57], **Add to portal** [57].
- **View** button. Opens a menu with the following entries:
    - **Vertical** checkbox. Vertically aligns the E-Mail list and an E-Mail's detail view. The functions for selecting and sorting are displayed below the tool bar.
    - **Compact** checkbox. Vertically aligns the E-Mail list and an E-Mail's detail view. The functions for selecting and sorting are displayed next to the tool bar.
    - **Horizontal**. Horizontally aligns the E-Mail list and an E-Mail's detail view.
    - **List** checkbox. Shows the list of E-Mail messages. To display the detail view click on an E-Mail.

      Above the detail view a navigation bar is displayed.
    - **Folder view** checkbox. Opens or closes the folder tree.
    - **Checkboxes** checkbox. Displays a checkbox next to each E-Mail in the list. This allows selecting multiple E-Mail messages to edit them at once [60].
    - **Contact pictures** checkbox. Next to each E-Mail in the list, a contact picture of the sender is displayed, provided the sender saved one in the address book.

      Note: The layout options **Horizontal** and **List** do not allow displaying contact pictures.
    - **Exact dates** checkbox. Shows the exact date and time when the E-Mail was received.

Display area

Contains the E-Mail list and an E-Mail's detail view. In order to select a layout, click on the **View** button in the tool bar.

List

Displays a list of the E-Mail messages in the current folder. The view shows the sender, subject, date or time of receipt. Unread E-Mail messages are marked with the *Unread* icon ✉ . If available, additional information is shown: attachment icon, coloured label, number of E-Mail messages in the conversation, priority. The following functions are available:

- You can select multiple E-Mail messages to edit them at once [60]. To do so enable the checkboxes next to the E-Mail messages by enabling the **Checkboxes** option from the **View** drop-down in the tool bar.

  You can also use your system's multi-selection functions.

  In order to select all visible E-Mail messages in the currently selected folder, enable the **Select all** checkbox above the list.

  Note: The **Select all** checkbox only selects all visible E-Mail messages in a folder. To reduce latency, only a certain percentage of the E-Mail messages in a folder will be loaded by the server if their number exceeds a defined limit. To display all E-Mail messages in a folder, browse to the bottom of the list. Wait until all E-Mail messages have been loaded by the server.
- If clicking on the **Sort by** button above the list a menu opens that helps you sort your E-Mail messages.

  To combine all E-Mail messages of a conversation in a single list entry, enable the **Conversations** checkbox in **Sort by**.

  The sorting setting will be applied to the selected E-Mail folder. You can use different settings for the individual folders.
- If clicking on an E-Mail, its content is displayed in the display area.

  If the E-Mail is part of a conversation, all E-Mail messages in this conversation are displayed in the detail view.

To adjust the list width, hover over the line between the list and the detail view. A double arrow will be displayed. Drag the border to the left or to the right.

Detail view

Displays the E-Mail that you selected in the list. The detail view includes the following components and functions:

- Subject

  If the E-Mail is part of a conversation, the number of E-Mail messages in this conversation is displayed. To open or close all E-Mail messages in the conversation, click the **Open/close all messages** icon ︽ . If clicking on a free area between the sender and the date of receipt, the E-Mail opens or closes.
- A picture of the sender, if available.
- **Unread** icon ✉ . If clicking the icon, the status will be changed from Read to Unread and vice versa.
- The sender's name. The names of additional E-Mail recipients, if existing. 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 E-Mail messages with this person, they are displayed below *Recent conversations*.
  - If you share appointments with this person, they are displayed below *Shared appointments*.
  - this person's data from social networks like XING or LinkedIn. You can use the available buttons to open this person's profile.

  If clicking on an appointment or an E-Mail, an additional pop-up opens.
- Date of receipt
- **Actions** icon ≡ . If clicking the icon, a menu with the following entries opens: **Reply** [52], **Reply all** [52], **Forward** [53], **Delete** [58], **Mark unread**, **Mark read** [56]**Send new e-mail** [51], **Invite to appointment** [64]**Save as distribution list** [64], **Move** [55], **Copy** [55], **Print** [58], **Save as file** [58]**View source** [57], **Reminder** [57], **Add to portal** [57].
- **Set colour** [56] icon 🔖 . Opens a menu allowing you to assign a coloured label to the E-Mail.
- If the E-Mail contains attachments, the following elements are displayed:
  - A button with an icon and the number of attachments. If clicking on it, the attachments are displayed as icons or a list.
  - Buttons that allow applying a function [50] to all E-Mail attachments at once.
  - The **squares** or **list** icon. If clicking the icons, the attachments are shown as icons or a list. To apply a function [50] to a specific attachment, click on the attachment's name.
- E-Mail text.

  Quotes from previous E-Mail messages are introduced with a vertical line. If clicking on **Show more**, the complete quote is displayed.

5.2 Displaying email messages

By default, the content of the inbox is displayed. Other E-Mail folders can be opened from within the folder tree. To reduce latency, only a certain percentage of the E-Mail messages in a folder will be loaded by the server if their number exceeds a defined limit. If browsing to the bottom of the list, the next part will be loaded.

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 E-Mail messages by entering a search term, use the search function.

   To sort the E-Mail list, click on **Sort by** above the list. Select a sort criterion from the menu.
3. To combine all E-Mail messages of a conversation in a single list entry, enable the **Conversations** checkbox in **Sort by**.
4. Click an E-Mail in the list. The content of the E-Mail will be displayed in the detail view. If the E-Mail is part of a conversation, all E-Mail messages in the conversation are displayed one below the other.

   If you selected **List** from the **View** drop-down in the tool bar, the list is replaced by the detail view of the selected E-Mail. In this case the following functions are available above the detail view.

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

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

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

   When having selected **Vertical** or **Compact** from the **View** drop-down in the tool bar, you can open an E-Mail in a separate window by double-clicking on the E-Mail in the list.
5. If a conversation is displayed, you can open or close an individual E-Mail in the detail view by clicking on a free area between the sender and the date of receipt.

   To open or close all E-Mail messages in the conversation, click the **Open/close all messages** icon ⏫ on the top right corner of the detail view.
6. If the E-Mail includes a quote from a previous E-Mail, you can display the quote by clicking the **Show quoted text** icon ··· .

5.3 Viewing or Saving email Attachments

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

- a preview of the attachments
- starting a slideshow if multiple pictures or documents exist as attachments
- opening the attachment in a new tab
- downloading the attachment
- saving the attachment to *Files* [121]

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

How to use the email attachment functions:

1. Select an E-Mail with one or multiple attachments.
2. If an E-Mail contains several attachments, an action can be executed for all attachments at once. To do so, open the Detail view and click on one of the buttons **Slideshow**, **Preview**, **Download**, **Save in Drive**.
3. In order to apply a function to a specific attachment, click on the name of the attachment in the Detail view. Select a function from the menu.

5.4 Sending email messages

The following options are available:

- Sending a new email
- Replying to E-Mail 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 additional functions: send copies, add attachments, append vCard, set importance

How to send a new email:

1. Click on **Compose** in the tool bar.
2. Enter the recipient's E-Mail address in the *To* field of the side bar. Press Enter.

   If there are several recipients, repeat the action. Alternatively, you can enter the name of a distribution list [78].

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

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

   Use the scrol lbar to browse the list. Click on a suggestion.

   Use the cursor keys to select a suggestion. Press Enter.
3. Enter a subject.
4. Enter the 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 E-Mail 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 E-Mail, click on **Copy (CC) to**. Enter the E-Mail address of the copy's recipient.

    If you want to prevent the recipients from seeing who gets a copy of the E-Mail, click on **Blind copy (BCC) to**. Enter the E-Mail address of the blind copy's recipient.

   If there are several recipients, you can enter the name of a distribution list [78].

   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 E-Mail accounts [66], you can use those addresses as sender addresses. To do so, proceed as follows:

    Click on **Sender**.

    Select an E-Mail 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 *Files* app as an attachment, click on **Files**. Open a folder in the *Add files* window. Check the boxes of the files that you want to add as attachments. Click on **Add**.

   In order to remove 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 from the desktop to the E-Mail 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 attach a signature to the E-Mail 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 the **More** icon≡▾ in the side bar. The following options are available:

   - set the priority
   - attach your vCard
   - request a delivery receipt

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

   Tip: You can also set the priority by clicking the icon on the right side in the **Subject** field.

5.4.2 Replying to E-Mail Messages

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

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

How to reply to an email:

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

   You can also use the **Actions** icon ≡ in the Detail view.
3. Enter the email text. You can use additional functions e.g.:email attachments.
4. Click on **Send**.

Result: The E-Mail 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 E-Mail, some of the E-Mail's input fields are pre-filled:

- The subject of the E-Mail is entered as the subject of the forwarded E-Mail. The subject is preceded with the text "Fwd: ".
- The 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 E-Mail.
2. Click the **Forward** icon ↪ in the tool bar.

   You can also use the **Actions** icon ≡ in the Detail view.
3. Select one or more recipients. Information can be found in How to send a new email: (page 51).
4. Enter the email text. You can use additional functions e.g.:email attachments.
5. Click on **Send**.

Result: The E-Mail is sent.

Tip: You can also forward multiple E-Mail messages at once or all E-Mail messages in an E-Mail conversation.

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 the **Settings** menu item.
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. In order to keep a copy of the E-Mail, enable **Keep a copy of the message**.

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 the **Settings** menu item.
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 frame when the vacation notice is to be sent. **Note:** Depending on your installation, this option might not be available due to various reasons. In this case, contact your administrator or host.
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 [61]. You can also edit the vacation notice in the E-Mail filter settings.

5.5 Organising E-Mail messages

Some of the techniques for organising contacts require that contact folders have already been set up by you. Information on creating folders can be found in Folders (page 144).

The following options are available:

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

5.5.1 Moving email messages

You can move an individual E-Mail or a complete E-Mail conversation to another folder.

How to move an email:

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

1. Select an E-Mail.
2. Click the **More** icon ≡▾ in the tool bar. Select **Move** from the menu.
   You can also use the **Actions** icon ≡ in the Detail view.
3. Select a folder in the *Move* window. Click on the **Move** button.

Tip: You can also move multiple E-Mail messages at once.

Tip: In order to move E-Mail messages using drag and drop, select an E-Mail or multiple E-Mail messages in the side bar. Drag the selected E-Mail messages to a folder in the folder tree.

5.5.2 Copying email messages

You can copy an individual E-Mail or a complete E-Mail conversation to another folder.

How to copy an email:

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

1. Select an E-Mail.
2. Click the **More** icon ≡▾ in the tool bar. Select **Copy** from the menu.
   You can also use the **Actions** icon ≡ in the Detail view.
3. Select a folder in the *Copy* window. Click on **Copy**.

Tip: You can also copy multiple E-Mail messages at once.

5.5.3 Marking email messages as read or unread

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

- marking individual E-Mail messages 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 E-Mail.
2. Click the **More** icon ≡▾ in the tool bar. Click on **Mark as unread** in the menu. If the E-Mail is part of a conversation, all messages received for this conversation are marked as unread.

   You can also use the **Actions** icon ≡ in the Detail view or click the icon next to the sender's picture.

In order to mark this E-Mail as read, click on **Mark as read**.

Tip: You can also mark multiple E-Mail messages at once as unread.

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 E-Mail messages as read**.

5.5.4 Collecting addresses

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

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

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

5.5.5 Categorising E-Mail messages with coloured labels

You can categorise an individual E-Mail or a complete E-Mail conversation with a coloured label.

How to categorise an E-Mail with a coloured label:

1. Select an E-Mail.
2. Click the **Set colour** icon 🔖 in the tool bar. Select a colour from the menu.

   You can also use the **Set colour** icon 🔖 in the Detail view.

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

Tip: You can also mark multiple E-Mail messages at once with a coloured 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 E-Mail.
2. Click the **More** icon ≡▾ in the tool bar. Select **View source** from the menu. The source is displayed in the *View source* window.

   You can also use the **Actions** icon ≡ in the Detail view.

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 E-Mail.
3. Click on **Edit draft** in the tool bar.
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 E-Mail.
2. Click the **More** icon ≡▾ in the tool bar. Select **Reminder** from the menu.

   You can also use the **Actions** icon ≡ in the Detail view.
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 E-Mail as widget to the Portal.

How to add an email to the portal:

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

   You can also use the **Actions** icon ≡ in the Detail view.

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 E-Mail.
2. Click the **More** icon≡▾ in the tool bar. Select **Save as file** from the menu.
   You can also use the **Actions** icon≡ in the Detail view.
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 list in the display area.

5.5.12 Printing email messages

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

- print an E-Mail's content

How to print an E-Mail's content:

1. Select an E-Mail. Click the **More** icon≡▾ in the tool bar. Click on **Print** in the menu. A window with a print preview opens.
   You can also use the **Actions** icon≡ in the Detail view.
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 Archiving E-Mail messages

You can archive a folder's E-Mail messages that are older than 90 days. The E-Mail messages are moved to the *Archive* folder. The *Archive* folder contains a separate subfolder for each calendar year. The archived E-Mail messages are saved to those subfolders sorted by the year of receipt. The *Archive* folder is created as soon as you initially use this function.

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

1. Select an email folder in the folder tree.
2. Click the **Folder-specific actions** icon▤ next to the folder name. Click on **Archive**.
3. In the *Archive messages* window click on **Archive**.

Note: You might have to refresh the page in order to display the folder.

5.5.14 Deleting E-Mail messages

The following options are available:

- Delete individual E-Mail messages or entire E-Mail conversations. By default, the E-Mail messages are moved to the Trash folder.
- Delete all E-Mail messages in an E-Mail folder. By default, the E-Mail messages are moved to the Trash folder.
- Recover deleted E-Mail messages from the Trash.
- Permanently delete E-Mail messages from the trash. Permanently deleted E-Mail messages are irrevocably lost.

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

How to delete email messages:

1. Select an E-Mail.
2. Click the **Delete** icon 🗑 in the tool bar.
   You can also use the [Del] or [Backspace] key.
   You can also use the **Actions** icon ≡ in the Detail view.

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

Tip: You can also delete multiple E-Mail messages at once.

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

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

How to recover deleted email messages:

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

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 E-Mail.
3. Click the **Delete** icon 🗑 in the tool bar.

Result: The email is permanently deleted.

5.5.15 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.

5.5.16 Editing multiple email messages at once

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

- forwarding email messages
- moving or copying contacts to another folder
- marking email messages as read or unread
- Categorising E-Mail messages with coloured labels
- Deleting E-Mail messages
- printing E-Mail messages
- saving email messages as a file

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

1. Use one or several of the following methods to select at least two E-Mail messages:

    If no checkboxes are displayed next to the E-Mail messages in the list, click on **View** in the tool bar. Enable **Checkboxes**.

    Check the boxes for at least two E-Mail messages.

    You can also use your system's multi-selection functions.

   In order to select all visible E-Mail messages in the currently selected folder, enable the **Select all** checkbox above the list.

   Note: The **Select all** checkbox only selects all visible E-Mail messages in a folder. To reduce latency, only a certain percentage of the E-Mail messages in a folder will be loaded by the server if their number exceeds a defined limit. To display all E-Mail messages in a folder, browse to the bottom of the list. Wait until all E-Mail messages have been loaded by the server.
2. Select a function from the tool bar.

5.5.17 Using Unified Mail

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

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

The following functions are available:

- To use Unified Mail enable the function for one or 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 the **Settings** menu item.
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**. The settings are displayed in a pop-up.
5. Enable **Use Unified Mail for this account**.
6. Click on **Save** at the bottom of the pop-up.

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

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

Tip: The account is indicated with a label below an E-Mail'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.

The following options exist:

- Creating a new rule.
- Changing existing rules.

Some E-Mail functions automatically set up filters, e.g. the vacation notice [53].

How to create a new rule:

1. Click the **System menu** icon⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. If **Mail filter** is not displayed in the side bar, enable **Advanced Settings** at the bottom of the side bar.

   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 [57].

   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. Click the **Settings** menu item.
2. If **Mail filter** is not displayed in the side bar, enable **Advanced Settings** at the bottom of the side bar.

   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 a rule. Drag the rule up or down and drop it appropriately.

   Note: This function is only available if there are at least two rules.
6. To delete a rule, click the **Delete** icon🗑 next to the rule.

5.6 Searching for E-Mail Messages

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

- search terms for subject, E-Mail text, sender or recipients
- Folders
- time range for the receipt

How to search for E-Mail messages:

1. Enter a search term in the search bar's input field. The search menu opens.
2. Use one of the following methods:

   In order to search in the sender, recipient, subject or in the E-Mail text, click on the search term in the search menu. You can also press Enter or click the **Search** icon🔍in the search bar.

   In order to only search in the subject, click on **in subject** in the search menu.

   In order to only search in the E-Mail text, click on **in e-mail text** in the search menu.

   In order to search for senders or recipients matching the search term, click on a name below *People*.

   Result: The search results are displayed in the list that is shown in the display area. The search criteria used are displayed below the search window.
3. You can further adjust the search result:

   In order to display all search criteria, enable **Show Advanced Filters**.

   In order to adjust a criterion, click the icon ▾ next to the search criterion. Select an entry from the menu. You can use the following search criteria:

      You can use the *Folder* drop-down to search in a specific folder.

      The *Time* drop-down allows limiting the search to a specific time range.

   In order to enhance your search in the list of found objects, start an additional search.

   In order to change or remove a search criterion, click the icon ✖. If you remove all search criteria, the search will be finished.
4. In order to finish the search, click on **Close search**.

5.7 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

5.7.1 Sharing Email Messages

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

- To make email messages available to internal users, proceed as follows:

    Create a new personal folder to which you will copy or move the required email messages.

    Share this folder [150] 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.

5.7.2 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. Click the **Settings** menu item.
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**.

5.7.3 Inviting all Email recipients to an appointment

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

How to invite all email recipients to an appointment:

1. Select an E-Mail.
2. Click the **Actions** icon≡ in the Detail view.
3. Select **Invite to appointment** from the menu.

   You can also use the **Actions** icon≡ in the Detail view.
4. Complete the details for creating an appointment [93].

5.7.4 Saving all email recipients as a distribution list

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

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

1. Select an E-Mail.
2. Click the **Actions** icon≡ in the Detail view.
3. Select **Save as distribution list** from the menu.
   You can also use the **Actions** icon≡ in the Detail view.
4. Complete the data for Creating a distribution list [78].

5.8 E-Mail Accounts

If you use external E-Mail accounts e.g., Google Mail, you can access those E-Mail accounts provided you have set up the external E-Mail accounts in the settings. Each external E-Mail account will receive its own E-Mail folder.

- First you have to set up or edit external email accounts.
- You can then use the external email accounts.

5.8.1 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⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Email and Social Accounts** in the side bar.
3. Click on **Add account** in the display area. Select **E-Mail 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 E-Mail account by clicking on the **Add e-mail account** button below the E-Mail folder tree.

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⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Email and Social Accounts** in the side bar.
3. Click on **Edit** next to an account in the display area. The settings are displayed in a pop-up.
4. 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.
5. Click on **Save** at the bottom of the pop-up.

How to delete an external email account:

1. Click the **System menu** icon⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Email and Social Accounts** in the side bar.
3. Click the **Delete** icon next to an account.🗑

5.8.2 Using an external email account

The following options are available:

- displaying the email messages of an external email account
- sending an E-Mail and enter the address of an external E-Mail 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 60).

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 [51]. Click on **Send**.

5.9 E-Mail settings

How to use the general Email settings:

1. Click the **System menu** icon⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar click on **Email**.
   In order to display all settings, click on **Advanced Settings** at the bottom of the side bar.
3. Change the settings [68].

The following settings are available.

- Permanently remove deleted e-mail messages
- Automatically collect contacts in the "Collected addresses" folder while sending E-Mail messages
- Automatically collect contacts in the "Collected addresses" folder while reading E-Mail messages
- Use fixed-width font for text email messages
- Append vCard
- Insert the original Email text into a reply?
- Forward Email Messages as
- Format e-mail 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
- Colour quoted lines
- Show requests for read receipts
- Signature
- IMAP folder subscription

Note: In order to display all settings, click on **Advanced Settings** at the bottom of the side bar.

Permanently remove deleted e-mail messages

Defines whether E-Mail messages will be removed permanently immediately after you click the Delete button or whether they will go to the trash folder.
Warning: Permanently removed E-Mail messages cannot be restored.

Automatically collect contacts in the "Collected addresses" folder while sending E-Mail messages

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

Automatically collect contacts in the "Collected addresses" folder while reading E-Mail messages

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

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.

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 e-mail 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 [66], 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.

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.

Show requests for read receipts

Defines whether a return receipt is displayed if a received E-Mail includes a 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 [64] to email folders.

6 Address Book

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

- The *Address Book* Components
- view contacts
- create and add contacts from various sources
- combine several contacts into distribution lists
- edit and organise contacts
- search for contacts
- share contacts with other users
- access contacts in your social networks
- interchange contacts with other applications
- use the *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.

Folder tree

Displays the contacts folders and enables you to navigate the folder structure [144]. In order to open the folder tree, click on the **View** button in the tool bar. Enable **Folder view**. 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 [143] and for exchanging data [157].
- Buttons in the folder tree offer functions for creating folders [146].

Tool bar

Contains the following buttons:

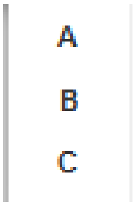
- **New** button. Creates a new contact [77] or a new distribution list [77].

  Note: This function is only enabled if you have opened an address book for which you have the appropriate permissions to create objects.
- **Send e-mail** button. Sends an E-Mail to the contact [79].
- **Invite** button. Invites the contact to an appointment [79].
- **Edit** button. Edits a contact's data [79].
- **Delete** button. Deletes the contacts [81] selected by you.
- **More** icon☰▾ . Opens a menu with the following entries: **Send as vCard** [80], **Print** [81], **Move** [80], **Copy** [80].

  Note: Some buttons might not be displayed if you do not have the appropriate permissions.

  Note: Depending on the address book or the contact's data, some buttons might be sorted differently or might not be available.
- **View** button. Opens a menu with the following entries:
  - **Folder view** checkbox. Opens or closes the folder tree.
  - **Checkboxes** checkbox. Displays a checkbox next to each contact in the list. This allows selecting multiple contacts to edit them at once [81].

Navigation bar



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

Display area

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

List

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:

- You can select multiple contacts to edit them at once [81]. To do so enable the checkboxes next to the contacts by enabling the **Checkboxes** option from the **View** drop-down in the tool bar.

  You can also use your system's multi-selection functions.

  In order to select all contacts in the currently selected folder, enable the **Select all** checkbox above the list.
- If clicking on a contact, its data is displayed in the detail view.
- The text above the list contains the name of the selected folder. The number corresponds to the number of objects in the selected folder.

Detail view

Shows the data of the contact that you selected in the list. The detail view includes the following components:

- Picture, name, job position, profession
- Business and private addresses
- Business and private phone numbers
- E-Mail addresses. If clicking on an E-Mail address a page for sending a new E-Mail [51] 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 property, use the search function.
   In order to display contacts with a certain initial letter, click a letter in the **navigation bar**.
3. Click on a contact in the list. The contact's data is displayed in the detail view.
4. In order to display another contact, do one of the following:
   Click on another contact in the list.
   Use the cursor keys to browse the list.

6.3 Viewing or Saving Contact Attachments

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

- displaying a preview of the attachment
- opening the attachment in the browser
- downloading the attachment
- saving the attachment to *Files* [121]

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

How to use the contact attachment functions:

1. Select a contact with an attachment.
2. Click on an attachment's name in the detail view. A menu with several functions opens.
3. Click on the desired function. Depending on the function, additional actions might be available.

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

6.4 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
- this person's data from social networks like XING or LinkedIn. You can use the available buttons to open this person's profile.

How to display a contact in the halo view:

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

   Select an E-Mail in the *E-mail* app. Click on a recipient or the sender in the detail view.

   Select an appointment or a task in the *Calendar* or *Tasks* app. Click on a participant in the detail view or in the pop-up.

2. To close the halo view, click on **Close** in the pop-up.

6.5 Creating contacts

The following options are available:

- Creating a new contact
- Adding a contact from vCard
- Importing contacts from files
- Importing contacts from social networks

6.5.1 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 on **New** in the tool bar. Click on **Add contact**.
3. Enter the data.
4. To add an attachment to the contact, click on **Upload file** below *Attachments*. Select one or multiple files.

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

   Tip: You can also add an attachment by dragging a document from a file browser or from the desktop to the contact window and dropping it there.
5. Click on **Save**.

6.5.2 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 E-Mail's vCard attachment:

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

6.5.3 Importing contacts from files

Information on importing contacts from various files can be found in Importing Data (page 158).

6.5.4 Importing contacts from social networks

You can use the contacts from your social networks like Facebook or LinkedIn by subscribing to the contacts. Information can be found in Subscribing to data (page 152)

6.6 Creating distribution lists

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

How to create a new distribution list:

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

6.7 Organising contacts

Some of the techniques for organising contacts require that contact folders have already been set up by you. Information on creating folders can be found in Folders (page 144).

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
- Adding contacts as XING contacts
- Inviting contacts to XING
- Printing Contacts
- Deleting Contacts
- Editing multiple contacts at once

6.7.1 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 list.
2. Click on **Send e-mail** in the tool bar.
3. Fill in the details for sending a new E-Mail [51].

6.7.2 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 list.
2. Select **Invite to appointment** from the tool bar.
3. Complete the details for creating an appointment.

6.7.3 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 from the list.
2. Click on **Edit** in the tool bar. The contact's data is displayed.
3. Edit the data.
4. Click on **Save**.

6.7.4 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 from the list.
2. Click the **More** icon ≡▾ in the tool bar. 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 list. Drag the selected contacts to a folder in the folder tree. Drop them there.

6.7.5 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 from the list.
2. Click the **More** icon ≡▾ in the tool bar. Select **Copy** from the menu.
3. Select a folder in the *Copy* window. Click on **OK**.

6.7.6 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 from the list.
2. Click the **More** icon ≡▾ in the tool bar. Click on **Send as vCard** in the menu.
3. Fill in the details for sending a new E-Mail [51].

6.7.7 Adding contacts as XING contacts

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

How to add a contact as an XING contact:

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

6.7.8 Inviting contacts to XING

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

How to invite a contact to XING:

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

6.7.9 Printing Contacts

In order to print contacts you can:

- You can also print a phone list with multiple contacts.

6.7.10 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 from the list.
2. Click on **Delete** in the tool bar.
3. Confirm that you want to delete the contact.

Result: The contact is deleted.

6.7.11 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. Use one or several of the following methods to select at least two contacts:
   - If no checkboxes are displayed next to the contacts in the list, click on **View** in the tool bar. Enable **Checkboxes**.
   - Check the boxes for at least two contacts.
   - You can also use your system's multi-selection functions.

   In order to select all contacts, enable the **Select all** checkbox above the list.
2. Select a function from the tool bar.

6.8 Searching for contacts

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

- search terms for name, E-Mail address, phone number, address
- private, public or shared folders
- contacts or distribution lists

How to search for contacts:

1. Enter a search term in the search bar's input field. The search menu opens.
2. Use one of the following methods:

    In order to search in names, addresses or phone numbers, click on the search term in the search menu. You can also press Enter or click the **Search** icon🔍in the search bar.

    In order to only search in names, click on **in names** in the search menu.

    Accordingly, you can limit the search to E-Mail addresses, phone numbers or addresses.

    In order to search for a contact matching the search term, click on a name below *Contact*.

    Result: The search results are displayed in the list that is shown in the display area. The search criteria used are displayed below the search window.
3. You can further adjust the search result:

    In order to display all search criteria, enable **Show Advanced Filters**.

    In order to adjust a criterion, click the icon ▾next to the search criterion. Select an entry from the menu. You can use the following search criteria:

        You can use the *Folder* drop-down to search in a specific folder.
        The *Folder type* drop-down allows to limit the search to private, public or shared folders.
        The *Type* drop-down allows to limit the search to contacts or distribution lists.

    In order to enhance your search in the list of found objects, start an additional search.

    In order to remove a search criterion, click the icon ✖. If you remove all search criteria, the search will be finished.
4. In order to finish the search, click on **Close search**.

6.9 Contacts in Teams

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

- The *Global address book* provides the contact data for all users. Each user can use those contacts.
- To make additional contacts available for internal users, proceed as follows:

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

  Share this folder [150] with all users or only with 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 where you can copy or move the wanted contacts 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.

6.10 Interchanging Contacts with Other Applications

The following options are available:

- export [163] contacts to use them in other applications
- import [158] contacts that you created in other applications

6.11 Address Book Settings

How to use the address book settings:

1. Click the **System menu** icon⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. If **Address Book** is not displayed in the side bar, enable **Advanced Settings** at the bottom of the side bar.

   Click on **Address Book** in the side bar.
3. Change the settings [85].

The following settings 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 work with the *Calendar* application.

- The *Calendar* Components
- display appointments
- create appointments
- answer appointment invitation
- manage appointments
- search for appointments
- share calendars with other users
- use the *Calendar* settings

How to launch 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.

Folder tree

Displays the calendar folders. and enables you to navigate the folder structure [144]. In order to open the folder tree, click on the **View** button in the tool bar. Enable **Folder view**. 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 [143] and for exchanging data [157].
- Buttons in the folder tree offer functions for creating folders [146].
- 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.

Tool bar

Contains the following buttons in the calendar views:

- **New** button. Creates a new appointment [93].
- **Scheduling** button. Opens the scheduling view for scheduling appointments with multiple participants [103].
- **View** button. Opens a menu with the following entries:
  - **Day**, **Work week**, **Week** or **Month** checkbox. Allows selecting a calendar view.
  - **List** checkbox. Activates the list view.
  - **Folder view** checkbox. Opens or closes the folder tree.
  - **Checkboxes** checkbox. Displays a checkbox next to each E-Mail in the list. This allows selecting multiple E-Mail messages to edit them at once [60].
  - **Print** button. Opens the print preview for printing a calendar sheet [98].

Additional buttons are available in the list view:

- **Edit** button. Edits an appointment's data [97].
- **Status** button. Changes the status of the appointment confirmation.
- **Delete** button. Deletes the appointments [99] selected by you.
- **More** icon≡▾ . Opens a menu with the following entries: Print [98], **Move** [98].

Display area

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

Day, ***Work week***, ***Week*** or ***Month*** calendar view.

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 [93] 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 [91].

If clicking on an appointment, the data is shown in the pop-up.

Pop-up

If clicking on an appointment in a calendar view, a pop-up opens. The pop-up shows the appointment data and the functions available:

- Buttons **Edit** [97], **Change status** [98], **Delete** [99].

  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 can not change your status.
- If clicking on **More**, a menu opens with the following functions: **Move** [98], **Print** [98].

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

List

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

- If clicking on a header, the first appointment of this time range is displayed.
- If clicking on an appointment, its data is displayed in the detail view.
- You can select multiple appointments to edit them at once [99]. To do so enable the checkboxes next to the appointments by enabling the **Checkboxes** option from the **View** drop-down in the tool bar.

  You can also use your system's multi-selection functions.

  In order to select all appointments in the currently selected folder, enable the **Select all** checkbox above the list.
- The text above 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↓↑ above the list, a menu opens that allows sorting appointments.

Detail view

If clicking on an appointment in the list, the detail view shows the appointment's data and the available functions:

- Date, the recurrence type (for recurring appointments), time and time zone
- Subject
- Appointment location, if entered
- Appointment description, if entered
- If the appointment has several participants, the number of participants that accepted, declined or have not replied yet are shown on the top right side above the list of participants. In order to filter the list of participants, click the icons.
- Names of the participants, if they exist. If clicking on a name, a pop-up opens. It includes the following components:
  - The person's contact data.
  - If you exchanged E-Mail messages with this person, they are displayed below *Recent conversations*.
  - If you have appointments scheduled with this person, they are displayed below *Shared appointments*.
  - this person's data from social networks like XING or LinkedIn. You can use the available buttons to open this person's profile.

  If clicking on an appointment or an E-Mail, an additional pop-up opens.
- If the appointment has other participants, the following buttons are displayed: **Send E-Mail to all participants** [102], **Invite to new appointment** [102], **Save as distribution list** [102]
- 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 Viewing appointments

You can choose between the following views:

- the list view of a calendar's appointments
- the calendar views of a calendar's appointments

In the calendar settings you can define a default view.

7.2.1 Displaying appointments in the calendar view

How to display appointments in the calendar view:

1. Click on **View** in the tool bar. Select one of the following entries: **Day**, **Work week**, **Week** or **Month**.
2. Open a calendar folder in the folder tree.
3. If you use several personal calendar folders you can define the appointments to be displayed.

   To display all the appointments from all your personal calendars, enable **Show appointments from all private calendars** in the folder tree.

   To only display the appointments in the currently selected calendar, disable **Show appointments from all private calendars**.
4. Click on an appointment in the calendar sheet. The calendar's data is displayed in the pop-up.
5. In order to browse the calendar, use the navigation bar on top of the calendar sheet.

7.2.2 Displaying appointments in the list view

How to display an appointment in the list view:

1. Click on **View** in the tool bar. Select **List**.
2. Open a calendar folder in the folder tree.
3. If you use several personal calendar folders you can define the appointments to be displayed.

   To display all the appointments from all your personal calendars, enable **Show appointments from all private calendars** in the folder tree.

   To only display the appointments in the currently selected calendar, disable **Show appointments from all private calendars**.
4. Click on an appointment in the list. The appointment's data is displayed in the detail view.
5. To display another appointment, use one of the following methods:

   Click on another appointment in the list.

   Use the cursor keys to browse the list.

7.2.3 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 Viewing or Saving Appointment Attachments

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

- displaying a preview of the attachment
- opening the attachment in the browser
- downloading the attachment
- saving the attachment to *Files* [121]

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

How to use the appointment attachment functions:

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

   Click on an appointment with an attachment in a calendar view. Click on an attachment's name in the pop-up.

   Click on an appointment with an attachment in the list view. Click on an attachment's name in the detail view.

   A menu with several functions opens.
2. Click on the desired function. Depending on the function, additional actions might be available.

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

7.4 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

7.4.1 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 on **New** 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. You can use additional functions: create recurrence, 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 is not to 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' E-Mail addresses or the resource's name in the input field below *Participants*. Click the icon +.

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

   Use the 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 [78].

   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 [103].
5. To add an attachment to the appointment, click on **Upload file** below *Attachments*. Select one or several files.

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

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

7.4.2 Creating appointments from iCal attachments

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

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

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

7.4.3 Importing appointments from files

Information on importing appointments from files can be found in Importing Data (page 158).

7.4.4 Subscribing to appointments from other calendars

You can import appointments from other calendars, e.g.: from your Google calendar, to a calender folder by subscribing to the other calendar. Additional information can be found in Subscribing to data (page 152).

7.4.5 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 times or set **Display as** to **Free**.

7.5 Answering appointment invitations

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

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

You can accept, temporarily accept or refuse your participation in the appointment. You can always changeyour 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 **Confirm**, **Temporary**, **Decline** in the detail view below *This e-mail contains an appointment*.

7.6 Managing Appointments

Some of the techniques for organising appointments require having already set up your own calendar folders. Information on creating folders can be found in Folders (page 144).

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

7.6.1 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 a calendar view. Click on **Edit** in the pop-up.

   Select an appointment in the list view. Click on **Edit** in the tool bar.

   The appointment data is displayed in a new page.
2. Edit the data.
3. Click on **Save**.

7.6.2 Editing appointments with drag and drop

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

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

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

7.6.3 Changing the appointment status

You can change your appointment status at a later point of time. Depending on the server configuration, you can only edit an appointment in your private calendars if you are a participant of the appointment. In recurring appointments you can change the confirmation for a single occurrence or for the complete series.

How to change your appointment status:

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

Click on an appointment in a calendar view. In the pop-up, click on **Change status**.

Select an appointment in the list view. Click on **Status** in the tool bar.

1. When having selected a recurring appointment, set whether the changes should be applied to the single occurrence or for the complete series.
2. Enter a comment in the *Change confirmation status* window. Click on one of the buttons **Decline**, **Tentative** or **Accept**.

7.6.4 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 need to have the appropriate permissions to create objects in the target folder.

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

   Click on an appointment in a calendar view. In the pop-up, click the **More** icon≡▾ . Select **Move** from the menu.

   Select an appointment in the list view. Click the **More** icon≡▾ in the tool bar. Select **Move** from the menu.

2. Select a folder in the *Move* window. Click on the *Move* button.

7.6.5 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 on **View** in the tool bar. Select one of the following entries: **Day**, **Work week**, **Week** or **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**.
    To only display the appointments in the currently selected calendar, disable **Show all**.
4. Click on **View** in the tool bar. Click on **Print** in the menu. 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 a calendar view. In the pop-up, click the **More** icon≡▾ . Click on **Print** in the menu.
    Select an appointment in the list view. Click the **More** icon≡▾ in the tool bar. Click on **Print** in the menu.
    A window with a print preview opens.
2. If required, change the printer settings. Click on the **Print** button.
3. Close the print preview window.

Tip: You can also print the data of multiple appointments at once.

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

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

Result: The appointment will be deleted.

7.6.7 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. Click on **View** in the tool bar. Select **List**.
2. Use one or several of the following methods to select at least two appointments:

   If no checkboxes are displayed next to the appointments in the list, click on **View** in the tool bar. Enable **Checkboxes**.

   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 above the list.
3. Select a function from the tool bar.

7.7 Searching for appointments

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

- search terms for subject, description, location, attachments' names
- private, public or shared folders
- single or recurring appointment
- future or past appointments
- appointment confirmation status

How to search for appointments:

1. Enter a search term in the search bar's input field. The search menu opens.
2. Use one of the following methods:

    In order to search in the subject or in the description, click on the search term in the search menu. You can also press Enter or click the **Search** icon🔍in the search bar.

    In order to only search in the subject, click on **in subject** in the search menu.

    Accordingly, you can limit the search to the description, location or the attachment's name.

    Result: The search results are displayed in the list that is shown in the display area. The search criteria used are displayed below the search window.

3. You can further adjust the search result:

    In order to display all search criteria, enable **Show Advanced Filters**.

    In order to adjust a criterion, click the icon ▾next to the search criterion. Select an entry from the menu. You can use the following search criteria:

        You can use the *Folder* drop-down to search in a specific folder.

        The *Folder type* drop-down allows limiting the search to private, public or shared folders.

        The *Type* drop-down allows searching for single or recurring appointments.

        The *Date* drop-down allows searching for future or past appointments.

        The *My Status* drop-down allows searching for appointments with a specific confirmation status.

    In order to enhance your search in the list of found objects, start an additional search.

    In order to remove a search criterion, click the icon ✖. If you remove all search criteria, the search will be finished.

4. In order to finish the search, click on **Close search**.

7.8 Appointments in teams

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

7.8.1 Sharing appointments

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

- To share a calendar with your team, proceed as follows:

  Create a new personal or public calendar folder.

  Share this folder [150] with all users on your team. To grant other team members the permission to create tasks, 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 E-Mail* option is enabled.

  The external partner receives an email with an appointment invitation in iCal format. Information can be found in Viewing appointments

7.8.2 Sending an Email to participants

You can send an email to all appointment participants.

How to send an Email to all appointment participants:

1. Select an appointment from the list or in a calendar view.
2. Click on **Send e-mail to all participants** in the tool bar.
3. Fill in the details in order to Send a new E-Mail [51].

7.8.3 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. Select an appointment from the list or in a calendar view.
2. Select **Invite to new appointment** from the tool bar.
3. Complete the details for creating an appointment [93].

7.8.4 Creating a distribution list from the list of participants

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

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

1. Select an appointment from the list or in a calendar view.
2. Select **Save as distribution list** from the tool bar.
3. Complete the details for creating the distribution list [78].

7.8.5 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 range, 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 an area ranging from the beginning to the end of the new appointment. The *Create appointment* page opens.
5. Complete the details for creating the appointment [93].

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 range, 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 an area ranging from the beginning to the end of the new appointment. The *Create appointment* page opens.
5. Complete the details for creating the appointment [93].

7.9 Calendar Settings

How to use the calendar settings:

1. Click the **System menu** icon⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Calendar** in the side bar.
   In order to display all settings, click on **Advanced Settings** at the bottom of the side bar.
3. Change the settings [104].

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
- E-mail notification for New, Changed, Deleted?
- Email notification for appointment creator
- Email notification for appointment participant
- Automatically delete a notification email after it has been accepted or declined?

Note: In order to display all settings, click on **Advanced Settings** at the bottom of the side bar.

Time scale in minutes

Specifies the interval for dividing the time grid in the *Day*, *Work week*, *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.

E-mail notification for New, Changed, 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
- search for tasks
- share tasks with other users
- interchange tasks with other applications
- use the *Tasks* settings

How to launch the *Tasks* app:

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

8.1 The *Tasks* Components

An introduction to the user interface can be found in The User Interface.

Folder tree

Displays the tasks folders. and enables you to navigate the folder structure [144]. In order to open the folder tree, click on the **View** button in the tool bar. Enable **Folder view**. 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 [143] and for exchanging data [157].
- Buttons in the folder tree offer functions for creating folders [146].

Tool bar

Contains the following buttons:

- **New** button. Creates a new task [112].
- **Edit** button. Edits a task's data [114].
- **Due** button. Changes a task's due date [114].
- **Done** button. Marks a task as done [114].
- **Delete** button. Deletes the tasks [115] selected by you.
- **More** icon☰▾ . Opens a menu with the following entries: **Print** [115], **Move** [114].
- **View** button. Opens a menu with the following entries:
    - **Folder view** checkbox. Opens or closes the folder tree.
    - **Checkboxes** checkbox. Displays a checkbox next to each task in the list. This allows selecting multiple tasks to edit them at once [81].

Display area

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

List

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 content is displayed in the detail view.
- You can select multiple tasks to edit them at once [115]. To do so enable the checkboxes next to the tasks by enabling the **Checkboxes** option from the **View** drop-down in the tool bar.

  You can also use your system's multi-selection functions.

  In order to select all contacts in the currently selected folder, enable the **Select all** checkbox above the list.
- The text above 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↓↑ above the list, a menu opens that allows sorting tasks. You can also define in this menu whether tasks marked done are displayed.
- If clicking on a task, its content is displayed in the detail view.

Detail view

Shows the data of the task that you selected in the list. The detail view includes the following components:

- 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
- Task details like billing information, if available
- If the task has several participants, the number of participants that accepted, declined or have not replied yet are shown on the top right side above the list of participants. In order to filter the list of participants, click the icons.
- Names of the participants, if they exist. If clicking on a name, a pop-up opens. It includes the following components:
  - The person's contact data.
  - If you exchanged E-Mail messages with this person, they are displayed below *Recent conversations*.
  - If you have appointments scheduled with this person, they are displayed below *Shared appointments*.
  - this person's data from social networks like XING or LinkedIn. You can use the available buttons to open this person's profile.

  If clicking on an appointment or an E-Mail, an additional pop-up opens.
- If the appointment includes external participants, their names are displayed below *External participants*.

8.2 Viewing tasks

How to display a task:

1. Open a tasks folder in the folder tree.
2. To quickly find a particular task, use one of the following methods:

   In order to only display tasks with certain properties, use the search function.

   To sort the tasks list, click the **Sort** icon↓↑above the list. Select a sort criterion from the menu.

   To only display due tasks in the list, click the **Sort** icon↓↑above the list. Disable **Show done tasks** in the menu.

3. Click on a task in the list. The task's data is displayed in the detail view.
4. To display another task, use one of the following methods:

   Click on another task in the list.

   Use the cursor keys to browse the list.

8.3 Viewing or Saving Task Attachments

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

- displaying a preview of the attachment
- opening the attachment in the browser
- downloading the attachment
- saving the attachment to *Files* [121]

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

How to use the task attachment functions:

1. Select a task with an attachment.
2. Click on an attachment's name in the detail view. A menu with several functions opens.
3. Click on the desired function. Depending on the function, additional actions might be available.

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

8.4 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 on **New** 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 repetition parameters are displayed.

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

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

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

   Use the 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 [78].
3. In order to add attachments to the task, click on **Upload file**. Select one or multiple files.

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

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

8.5 Answering task invitations

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

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

You can accept, temporarily accept or refuse your participation in the task.

How to answer a task invitation in the notification area:

1. Click the **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 confirm the task directly in the notification area by clicking on the **Accept invitation** button.

How to answer a task invitation in an email invitation:

1. Display an E-Mail with a task invitation in the *E-mail* application.
2. Click on one of the buttons **Confirm**, **Temporary**, **Decline** in the detail view below *This e-mail contains a task*.

8.6 Managing Tasks

Some of the techniques for organising tasks require having set up your own tasks folders. Information on creating folders can be found in Folders (page 144).

The following options are available:

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

8.6.1 Editing tasks

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

How to edit a task:

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

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

8.6.2 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 create objects in the folder containing the task.

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

8.6.3 Changing a task's due date

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

How to change a task's due date:

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

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

8.6.4 Moving tasks

You can move a task or multiple tasks at once to another folder.

How to move a task:

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

1. Select a task from the list.
2. Click the **More** icon≡▾ in the tool bar. Select **Move** from 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 list. Drag the selected tasks to a folder in the folder tree.

8.6.5 Changing tasks confirmations

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

How to change your task confirmation:

1. Select a task from the list.
2. Click the **More** icon≡▾ in the tool bar. Click on **Change confirmation status** in the menu.
3. A window opens. Select a confirmation status. If required, enter a message.
4. Click on **Change status**.

8.6.6 Printing tasks

In order to print tasks you can do the following:

- print a task's data

How to print an appointment's data:

1. Select a task from the list.
2. Click the **More** icon≡▾ in the tool bar. Click on **Print** in the menu. A window with a print preview opens.
3. If required, change the printer settings. Click on the **Print** button.
4. Close the print preview window.

Tip: You can also print the data for multiple tasks at once.

8.6.7 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 from the list.
2. Click on **Delete** in the tool bar.
3. Confirm that you want to delete the task.

Result: The task will be deleted.

8.6.8 Editing multiple tasks at once

You can execute the following functions for 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. Use one or several of the following methods to select at least two tasks:

    If no checkboxes are displayed next to the tasks in the list, click on **View** in the tool bar. Enable **Checkboxes**.

    Enable the checkboxes for at least two tasks.

    You can also use your system's multi-selection functions.

   In order to select all tasks, enable the **Select all** checkbox above the list.
2. Select a function from the tool bar.

8.7 Searching for tasks

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

- search terms for subject, description, attachments' names
- private, public or shared folders
- single or recurring task
- the task's status
- the task's participants

How to search for tasks:

1. Enter a search term in the search bar's input field. The search menu opens.
2. Use one of the following methods:

    In order to search in the subject or in the description, click on the search term in the search menu. You can also press Enter or click the **Search** icon🔍in the search bar.

    In order to only search in the subject, click on **in subject** in the search menu.

    Accordingly, you can limit the search to the description or the attachment's name.

   Result: The search results are displayed in the list that is shown in the display area. The search criteria used are displayed below the search window.
3. You can further adjust the search result:

    In order to display all search criteria, enable **Show Advanced Filters**.

    In order to adjust a criterion, click the icon ▾ next to the search criterion. Select an entry from the menu. You can use the following search criteria:

        You can use the *Folder* drop-down to search in a specific folder.

        The *Folder type* drop-down allows limiting the search to private, public or shared folders.

        The *Task type* drop-down allows searching for single or recurring tasks.

        The *Task status* drop-down allows searching for tasks with a specific status.

        The *Task participants* drop-down allows searching for tasks with specific participants.

    In order to enhance your search in the list of found objects, start an additional search.

    In order to remove a search criterion, click the icon ✖. If you remove all search criteria, the search will be finished.
4. In order to finish the search, click on **Close search**.

8.8 Tasks in teams

The following options are available:

- Sharing [118] tasks with other users
- Delegating [118] tasks to other users

8.8.1 Sharing tasks

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

- To share a folder with your team, do the following:

  Create a new personal or public tasks folder.

  Share this folder [150] with all users on your team. To grant other team members the permission to create tasks, share this folder with write permissions.

  Further information can be found in Permissions.
- To invite external partners to a task, proceed as follows:

  When creating the task, add external partners as *external participants*.

8.8.2 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.

8.9 Interchange Tasks with other Applications

The following options are available:

- export [163] tasks to use them in other applications
- import [158] tasks that you created in other applications

8.10 Task Settings

How to use the task settings:

1. Click the **System menu** icon⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. If **Tasks** is not displayed in the side bar, enable **Advanced Settings** at the bottom of the side bar. Click on **Tasks** in the side bar.
3. Change the settings [120].

The following settings are available.

- Email notification for New, Changed, Deleted?
- Email notification for task creator
- E-mail notification for task participant

Email notification for New, Changed, Deleted?

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

Email notification for task creator

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

E-mail notification for task participant

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

9 Files

Learn how to work with the *Files* application.

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

Information on the usage of local clients on desktops and mobile devices can be found in the OX Drive client's user guide.

How to launch the *Files* app:

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

9.1 The *Files* Components

An introduction to the user interface can be found in The User Interface.

Folder tree

Displays the folders and enables you to navigate the folder structure [144]. In order to open the folder tree, click on the **View** button in the tool bar. Enable **Folder view**. 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 [143] and for exchanging data [157].

Tool bar

Contains the following buttons:

- **New** button. Contains the following functions:
  - **Upload new file**. Creates a new file [127].
  - **Add note**. Creates a simple text file [140].
  - **New text document**. Creates a new text document.
  - **New spreadsheet** Creates a new spreadsheet.
- If you opened a personal folder, the **Share folder** button is displayed. If clicking on this button, a publication [153] of this folder will be created.
- If the folder contains images, audio or video files, icons for playing multimedia files [126] are displayed.
- If a file has been selected, the **Download** [125] icon will be displayed.
- If a file has been selected, the **Delete** [130]**More** icon will be displayed.
- If a file has been selected, the **More** icon≡▾ will be displayed. If clicking the icon, a menu with the following entries opens: **Send by mail** [128], **Send as internal link** [128], **Show internal link** [128], **Add to portal** [130], **Move** [129], **Copy** [129], **Lock** [130].

  Note: If you selected multiple files, some functions are not available.
- **View** button. Selects one of the following views for the detail view:
  - List
  - Icons
  - Square

Note: Some buttons are only displayed if the selected folder contains files.

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

Navigation path to the selected folder.

- An icon for each file in the selected folder. A file preview is displayed, if available.
- The file's name

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 shows additional data and functions.

Pop-up

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

- the **Open** button [125]

  If clicking on a document, the **View** [125] button is displayed instead of the **Open** button.
- If clicking on an editable file, the **Edit** button is displayed.
- Buttons **Download** [125], **Delete** [130]
- If clicking the **More** icon≡▾ a menu with the following entries opens: **Share this file** [153], **Send by mail** [128], **Send as internal link** [128], **Show internal link** [128], **Add to portal** [130], **Rename** [129], **Edit description** [129], **Move** [129], **Copy** [129], **Lock** [130].

  Note: Some buttons might not be displayed if you do not have the appropriate permissions.
- If clicking on a document, the **Edit as new** 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 on **View** in the tool bar. Select one of the following entries: **List**, **Icons**, **Squares**.
2. If the folder tree is closed, click on **View** in the tool bar. Enable **Folder view**.
   Open a folder in the folder tree.
3. Click on a file in the display area. The data are displayed in the pop-up.

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

9.3 Opening Files and Displaying Contents

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

- display or download a file's content [125]
- display the contents of documents in Office file formats [125]
- play multimedia files [126]

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 [125] and multimedia files [126].

How to display a file's content:

1. Open a folder containing files, in the folder tree.
2. Click on a file in the detail view. In the pop-up, click on **Open**.
   If having selected a document, click on **View** in the pop-up. You can also click on the document's preview.
3. Depending on the file's content, the result varies:
   Plain text files and images in common file formats are 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 detail view. In the pop-up, click on **Download**
   You can also select one or several files. Click the **Download** icon in the tool bar.
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 Office 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 E-Mail.

How to display the contents of documents:

1. Open a folder containing documents, in the folder tree.
2. Click on a file in the detail view. In the pop-up, click on **View**. You can also click on the document's preview. 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 the Documents user documentation.
5. To close the *Document Viewer*, click the **Close** icon ☒ in the Office tool bar.

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 the **Start slideshow** icon in the function bar.

How to play audio files:

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

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

How to play video files:

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

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

9.4 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 on **New** 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 tool bar.
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 *Files* 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 144).

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

   You can also select one or several files. Click the **More** icon≡▾ in the tool bar. Click on **Send as internal link** in the menu.
2. In the *Compose new email* page, complete the details for sending the email [51].

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 detail view. In the pop-up, click the **More** icon≡▾ . Click on **Send by e-mail** in the menu.

   You can also select one or several files. Click the **More** icon≡▾ in the tool bar. Click on **Send by e-mail** in the menu.

   Note: Depending on the server configuration, you might not be able to send files by E-Mail, if they exceed a certain file size. In this case, use the Send as internal link function.
2. Complete all data for sending the email [51] 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 *Files* app.

How to show the link to a file:

Click on a file in the detail view. In the pop-up, click the **More** icon≡▾ . Click on **Show internal link** in the menu.

You can also select one or several files. Click the **More** icon≡▾ in the tool bar. 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 detail view. In the pop-up, click the **More** icon≡▾ . 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 for editing objects in the folder containing the file.

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

9.5.6 Moving files

You can move a file or multiple files at once to another folder.

How to move a file:

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

1. Click on a file in the detail view. In the pop-up, click the **More** icon≡▾ . Select **Move** from the menu.

   You can also select one or several files. Click the **More** icon≡▾ in the tool bar. Select **Move** from the menu.
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 move a file or multiple files at once to another folder.

How to copy a file:

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

1. Click on a file in the detail view. In the pop-up, click the **More** icon ≡▾ . Select **Copy** from the menu.
   You can also select one or several files. Click the **More** icon ≡▾ in the tool bar. Select **Copy** from the menu.
2. Select a folder in the *Copy* window. Click on **Copy**.

9.5.8 Adding files to the portal

You can add a file as widget to the Portal.

How to add a file to the portal:

Click on a file in the detail view. In the pop-up, click the **More** icon ≡▾ . Click on **Add to portal** in the menu.
You can also select a file. Click the **More** icon ≡▾ in the toolbar. Click on **Add to portal** in the menu.

9.5.9 Deleting files

You can delete a single file or multiple files at once. The following options are available:

- Delete single files. The files are moved to the *Deleted files* folder.
- Recover deleted files from the *Deleted files* folder.
- Permanently delete files in the *Deleted files* folder.
  Warning: A file deleted in the *Deleted files* folder cannot be recovered.

How to delete a file:

1. Click on a file in the detail view. In the pop-up, click on **Delete**.
   You can also select one or several files. Click the **Delete** icon 🗑 in the tool bar.
2. Confirm that you want to delete the file.

Result: The file will be deleted.

How to recover deleted files:

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

Result: The files are moved to the selected folder.

How to permanently delete a file:

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

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

Result: The files are permanently deleted.

9.5.10 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 cannot 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 detail view. In the pop-up, click the **More** icon≡▾ . Click on **Lock** in the menu.

You can also select one or several files. Click the **More** icon≡▾ in the tool bar. Click on **Lock** in the menu.

How to unlock a file:

Click on a locked file in the detail view. In the pop-up, click the **More** icon≡▾ . Click on **Unlock** in the menu.

You can also select one or several locked files. Click the **More** icon≡▾ in the tool bar. Click on **Unlock** in the menu.

9.5.11 Working with versions

The following options are available for working with versions:

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

How to open or save the current version:

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

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

How to open or save a certain version:

1. Click on a file in the detail view. 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 detail view. 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 detail view. 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 the **More** icon≡▾ in the tool bar. Select a function from the menu.

9.6 Searching for Files

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

- search terms for file names, file descriptions, file contents
- Folders
- file type

How to search for files:

1. Enter a search term in the search bar's input field. The search menu opens.
2. Use one of the following methods:

    In order to search in the file name, the file description or the file contents, click on the search term in the search menu. You can also press Enter or click the **Search** icon 🔍 in the search bar.

    In order to only search in the file names, click on **in file name** in the search menu.

    Accordingly, you can limit the search to the file description or the file contents.

    Result: The search results are displayed in the list that is shown in the display area. The search criteria used are displayed below the search window.
3. You can further adjust the search result:

    In order to display all search criteria, enable **Show Advanced Filters**.

    In order to adjust a criterion, click the icon ▾ next to the search criterion. Select an entry from the menu. You can use the following search criteria:

    You can use the *Folder* drop-down to search in a specific folder.

    The *File type* drop-down allows limiting the search to a certain file type.

    In order to enhance your search in the list of found objects, start an additional search.

    In order to remove a search criterion, click the icon ✖. If you remove all search criteria, the search will be finished.
4. In order to finish the search, click on **Close search**.

9.7 Accessing Files with WebDAV

With WebDAV you can access the *Files* 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.
Note: To create objects with WebDAV in a public or shared folder, you need to have at least the following permissions for the respective folder: create objects, edit own objects. To also read own objects, you additionally need this permission: read own objects. Information on permissions can be found in 11.2: Permissions (page 148).

Prior to accessing the *Files* 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

9.7.1 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 *Files* app files are displayed in the browser.

9.7.2 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 *Files* app files.

9.7.3 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* dialogue window enter the following address:
   https://<address>/servlet/webdav.infostore
   where <address> needs to be replaced by the Groupware server's IP address or URL.
5. Enter your username and password for accessing the Groupware Server.
6. In the next dialog window you can assign a name to the network resource.
7. In the next dialog window click on **Finish**.

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

9.7.4 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.
- Then, manually set up the WebDav access.

Note: Depending on the Windows 7 setup, there can be delays when accessing WebDAV folders. If this is the case, follow the instructions in this article:
http://support.microsoft.com/kb/2445570.

How to manually set up WebDAV access under Windows 7:

Prerequisite: The registry key *BasicAuthLevel* has to be set to *2* in the Windows registry database. Additional information can be found in the Microsoft articles http://support.microsoft.com/kb/928692 and https://support.microsoft.com/kb/841215.

1. In the navigation area of the Windows Explorer select the entry **Computer**.
2. In the icon bar click on **Connect drive**. The *Connect drive* window opens.
3. Click on **Connect to a Web site that you can use to store your documents**. The *Add network address* window opens. Click on **Next**.
4. Select **Select custom network address**. Click on **Next**.
5. In the *Add network path* dialogue window enter the following address:
   https://<address>/servlet/webdav.infostore
   where <address> needs to be replaced by the Groupware server's IP address or URL.
   Click on **Next**.
6. Enter your username and password for accessing the Groupware Server. Click on **OK**.
7. On the next page you can assign a name to the network address. Click on **Next**.
8. Click on **Finish**.

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

9.8 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 [150] 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.

  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 be found in Permissions.

9.9 Drive Settings

How to use the Drive settings:

1. Click the **System menu** icon⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. If **Drive** is not displayed in the side bar, enable **Advanced Settings** at the bottom of the side bar. Click on **Drive** in the side bar.
3. Change the settings [138].

The following settings are available:

- Show hidden files and folders

Show hidden files and folders

Defines whether hidden files and folders are displayed. Such files and folders might be created by the local Drive clients.

10 Simple Pad

Learn how to work with the *Simple Pad* application.

- create text files
- edit text files

In order to search for text files, organise them or share them with other users, use the *Files* [121] application.

How to launch the *Simple Pad* app:

Create a new text file or open an existing text file.

10.1 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 *Files* app.
2. Open a folder in the folder tree.
   Note: Open a folder for which you have the appropriate permissions to create objects.
3. Click the **New** icon⊞ in the tool bar. 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**.

10.2 Editing Text Files

How to edit a text file:

1. Launch the *Files* app.
2. Open a folder containing text files, in the folder tree.
   Note: Open a folder for which you have the permission to create 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 side bar. 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**.
   In order to finish, click on **Close**.

11 Organising Data

Learn how to organise your data.

- 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 &amp; Subscribe.

11.1 Folders

Folders help you

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

Learn more about folders and how to use them:

- the folder types [144]
- navigate within the folder structure [144]
- hide [145] certain folders
- add folders to favourites [145]
- create [146], rename,delete [146], and move [146] folders or subfolders.

11.1.1 Folder types

The following folder types exist in the folder tree:

- Personal folders
  - Personal folders contain your E-Mail messages, contacts, appointments, tasks, and files. Other users cannot view your personal folders, unless you share them with other users.
  - Your personal folders for contacts, appointments, tasks, and files 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 displayed.

11.1.2 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 or close the folder tree:

Use one of the following methods:

Click on **View** in the tool bar. Enable or disable **Folder view**.
Below the folder tree, click the **Open folder view** icon » or the **Close folder view** icon « .
In the *E-mail* app, double-click a free area above the E-Mail list.

How to 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 open a certain folder:

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

Result: The folder's content is displayed

11.1.3 Hiding folders

In the *Address Book*, *Calendar* or *Tasks* apps, you can hide certain personal, shared or public folders. The following functions are available:

- hide single folders
- display hidden folders again

Each hidden folder is displayed in the folder tree below *Hidden folders*.

How to hide a folder:

1. In the *Address Book*, *Calendar* or *Tasks* app, open the folder tree and select the folder that you want to hide.
2. Click the **Folder-specific actions** icon☰ next to the folder name. Click on **Hide**.

   Note: If you select a folder that can not be hidden, this function is not displayed.

How to display a hidden folder again:

1. In the *Address Book*, *Calendar* or *Tasks* app, click on **Hidden folders** at the bottom of the folder tree. The hidden folders will be displayed.
2. Click the **Folder-specific actions** icon☰ next to a folder name. Click on **Show**.

11.1.4 Adding folders to favourites

You can add frequently used folders to the symbolic folder *Favourites*. The following functions are available:

- add folders to favourites
- remove folders from favourites

The original position of the folders in the folder tree will not be affected by those actions.

How to add a folder to *Favourites*:

1. Select a folder in the folder tree.
2. Click the **Folder-specific actions** icon☰ next to the folder name. Click on **Add to favourites**.

Result: The folder is displayed in the upper part of the folder tree below *Favourites*. If *Favourites* does not exist already, it will be created automatically.

How to remove a folder from *Favourites*:

1. Select a folder in the folder tree below *Favourites*.
2. Click the **Folder-specific actions** icon☰ next to the folder name. Click on **Remove from favourites**.

   You can also activate this function by right-clicking on the folder in its original position in the folder tree.

Result: The folder is removed from *Favourites*. If *Favourites* is empty, the folder will be removed.

11.1.5 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 [148]. Depending on the app, you can create folders or subfolders.

How to create a new subfolder in the *E-mail* or *Files* app:

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

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

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

11.1.6 Renaming folders

You can rename subfolders in your personal folders. For other folders you need the appropriate permissions [148].

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**.

11.1.7 Moving folders

You can move subfolders from your personal folders. For other folders you need the appropriate permissions [148].

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*.

11.1.8 Deleting folders

You can delete subfolders in your personal folders. For other folders you need the appropriate permissions [148].

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 the **Delete** button.
3. Confirm that you want to delete the folder.

Result: The folder and its objects are permanently deleted.

11.2 Permissions

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

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

A description of permissions can be found in 11.2.1: Which permissions can be granted? (page 148).
A listing of preset permissions for specific folders can be found in in 11.2.2: Permissions for folders that already exist (page 149) and in 11.2.3: Permissions for new folders (page 149).
Information on granting permissions can be found in 11.2.4: Sharing folders (page 150).

11.2.1 Which permissions can be granted?

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

- Owner
- Administrator
- Author
- Guest

Owner

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

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

Administrator

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

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

Author

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

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

Guest

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

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

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

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

11.2.2 Permissions for folders that already exist

You have the following permissions for folders that already exist:

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

11.2.3 Permissions for new folders

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

- in a personal folder [149]
- in a public folder [149]
- in a shared folder [149]

If you create a new folder in a personal folder:

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

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

- You are the owner.
- Other users will get no rights. You have to set the permissions for the new folder. If you then create new subfolders in this folder, the permissions for this folder are inherited by the new subfolders. Information on granting permissions can be found in 11.2.4: Sharing folders (page 150).

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.

11.2.4 Sharing folders

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

- 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: Be aware of 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 5.7.2: Subscribing to Email folders (page 64).

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 team work 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 team work.
5. If required, repeat these steps to grant additional permissions.
6. Click on **Save**.

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

How to change the folder permissions:

1. Select a folder in the folder tree.

   Note: You need to have administrative rights for this folder.
2. Click the **Folder-specific actions** icon☰ next to 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 [148] 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**.

11.3 Publish&amp;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.

11.3.1 Subscribing to data

The following options are available:

- 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.
- Subscribe to appointments from your Google calendar.
- Subscribe to other users' data using an E-Mail invitation
- Refresh subscribed data
- Disable, enable, change or delete a subscription. Information can be found in Managing subscribed and published folders (page 154)

How to subscribe to data from a social network:

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. In the *Subscribe* window, select the data to subscribe to:

   Select the data source from the *Source* drop-down field.

   If you have already set up an account, select the name of the account with the data source in *Account*.

   If you have not set up an account yet, click on *Add new account*. Follow the instructions.
4. If the subscribed data should go into a new folder, enable **Add new folder for this subscription**.

   Note: If you do not enable this option, the data will be imported to your personal contact folder.
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 **New subscription**.
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 is imported. This can 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** 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 the **Settings** menu item.
2. Click on **Publications and Subscriptions** in the side bar.
3. Click on **refresh** next to a subscription in the display area.

11.3.2 Publishing data

Privacy

When using this 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 other Privacy Acts of your country, 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, other users or external users can use that data. The following options are available:

- Publishing an address book's or a files folder's contents
- Publishing a single file
- Enabling, disabling, or deleting a publication. Information can be found in Managing subscribed and published folders (page 154)

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

1. Launch the *Address Book* or the *Files* 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 *Files* app you can also click on **Share folder** in the tool 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. Launch the *Files* app.
2. Open a folder containing 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**.

   In order to finish the process, click on **Share**.

11.3.3 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
- edit or remove a social network's account

How to display all subscriptions or publications:

1. Click the **System menu** icon⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Publications and Subscriptions** in the side bar.
3. Use the following functions to view more details:

   To show the folder of the publication or subscription, 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 the **Settings** menu item.
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 the **Settings** menu item.
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 the **Settings** menu item.
2. Click on **Publications and Subscriptions** in the side bar.
3. Click the **Delete** icon🗑 next to a publication or subscription in the display area.

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 the **Settings** menu item.
2. Click on **E-Mail and Social Accounts** in the side bar.
3. Click on **Edit** next to an account in the display area. Change the settings in the *Account settings* window. To delete an account, click the **Delete** icon 🗑 next to the account.

Instructions for setting up an account can be found here.

12 Data Interchange

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.

12.1 Importing Data

The import functions allow importing data created in other applications. The following options are available:

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

12.1.1 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

12.1.1.1 Which iCal objects are imported?

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

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 for 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

12.1.1.2 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.

12.1.1.3 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* app.
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.

12.1.2 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.

12.1.3 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.

12.2 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. The following options are available:

- exporting a folder's data.

12.2.1 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:

- Learn how to change your personal data.
- Learn how to customise the basic settings.
- Learn how to set up additional email accounts [66].

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 E-Mail messages or appointment notifications, the *Unread Badge* icon 1 ▸ to the right side of the menu bar shows the number of new objects. Click the icon to open the *Notification Area*. It contains information about the new objects. From there you can also directly activate functions, e.g. read the new E-Mail or confirm the new appointment. Information can be found in The 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 autocomplete function to more easily enter the addresses. This FAQ list provides an explanation of the differences between the input fields.
- If you regularly send E-Mail messages to the same group of people, create a distribution list in the *Address Book* app and add the E-Mail addresses to the distribution list. Information can be found in Creating distribution lists (page 78).

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 57).

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 66).

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 53).

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 60).

How can I use the conditions in email filter rules?

You can create a condition by

- selecting an E-Mail component, e.g. "Subject";
- selecting a criterion, e.g. "Is exactly";
- entering an argument, e.g. "minutes".

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

- Criterion: "contains"
  The condition is met if the subject contains the characters in the argument.
  Example: The argument is "minutes".

  The condition is met for the subject "minutes".

  The condition is also met for the subject "meeting minutes".
- Criterion: "is exactly"
  The condition is met if the subject exactly matches the argument's character string.
  Example: The argument is "minutes".

  The condition is met for the subject "minutes".

  The condition is not met for the subject "meeting minutes".
- Criterion: "Matches"
  The condition is met if the subject exactly matches the characters in the argument. The character string can contain wildcards.
  Example: The argument is "minutes*". The "*" character is a wildcard for any characters.

  The condition is met for the subject "minutes update".

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

  The condition is met for the subject "minutes update".

  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 152).

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. Information can be found in Enabling an email reminder (page 57).

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

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

How do I use the 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** when creating an appointment or click the **Scheduling** icon👥 in the tool bar. Information can be found in Scheduling appointments with several participants (page 103).

Questions about data organisation and team work

How can I make certain contacts available to my external partners?

You can also give external partners access to your groupware address books' contacts or to your social networks' contacts like 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's folder.
3. Publish this contacts folder. Information can be found in Publishing data (page 153).

How can I share specific documents with my external partners?

You can share the contents of documents folders with external partners. To do this proceed as follows:

1. In the *Files* app, you can collect the documents in a separate folder.
2. Publish this folder. Information can be found in Publishing data (page 153).

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

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

- Folder permissions: 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 objects.

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

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

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

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

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

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