Groupware

User Guide

Groupware: User Guide

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1 About This Documentation

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

- 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 58).

Explanatory text

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

Example:

The following options are available:

- Send new E-Mail messages
- Reply to E-Mail messages.
- Forward E-Mail messages.

Step by step instructions

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

Groupware	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 organized by the user. Examples: E-Mail messages, contacts, appointments, tasks, documents, files, folders
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.
Group	In case you frequently want to add the same people to appointments or tasks, you can create a group consisting of those people. You can then add the group as a participant instead of adding specific people.
Resource	Other than participant conflicts, resource conflicts cannot be ignored when creating appointments. If creating appointments, resources that are already booked for other appointments cannot be added.
Distribution list	If frequently sending E-Mail messages to the same people, you can add them to a distribution list. You can then use the distribution list as recipient instead of adding specific people as recipients.
External participant	A person that is not a user but that participates in an appointment or task.
Internal email account	Your Groupware E-Mail account You will automatically get this account. You cannot 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.

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

Learn more [41].

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 [47].

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 [87].

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 [107].

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 [141].

Editor
Create and edit simple text files.

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

Learn more [185].

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

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

Learn more [159].

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 [189].

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 11, Edge
- Mozilla Firefox, latest version
- Apple Safari on Mac OS X, current version
- Google Chrome, latest version

Browser settings

- Cookies must be enabled
- JavaScript must be enabled

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.

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.

   Depending on the groupware configuration, there is a **Sign out** icon .
2. If anyone else has access to the machine, close the browser.

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

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

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

3 First Steps

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, you need to set up accounts for social networks.
- In order to access your groupware data from local clients or apps, you can install clients or apps for workstations or mobile devices. Depending on the groupware configuration, the following options are available:
  - manually download and install clients and apps
  - use a wizard to set up clients and apps

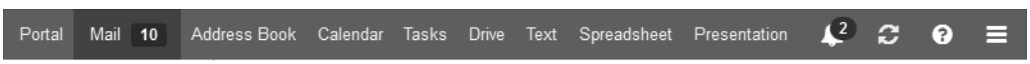
3.1 The User Interface

The user interface includes the following components:

- A menu bar on the top.
Depending on the groupware configuration, there is a header bar above the menu bar. It displays the software title and your username.
- On the left side below the menu bar the search bar is displayed. It can be enabled or disabled together with the folder tree.
- The Folder tree can be activated on the left side.
- On the right side below the menu bar a 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

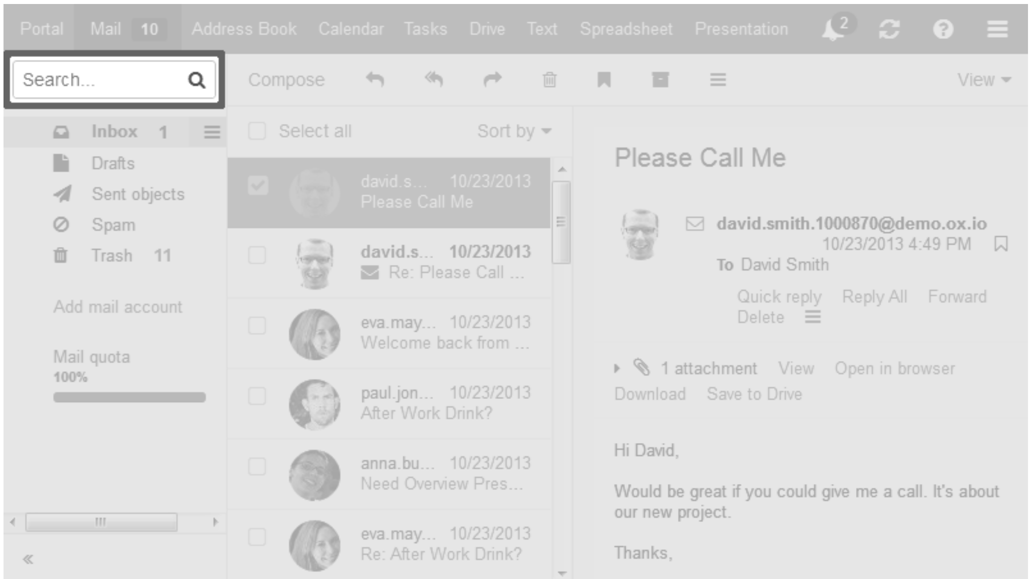


content

- Buttons for launching applications like *E-Mail* or *Calendar*
Next to the **E-Mail** button, the number of unread E-Mail messages in your personal E-Mail folders are displayed.
- 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., scheduled appointment invitations. If clicking the icon, the notification area opens.
- **Refresh** icon . Reloads objects from the server. Irrespective of this function, objects are refreshed in regular intervals.
- **Help** icon . Opens a context related help page. Depending on the current app, the respective help page from the online help is displayed. You can also open the online help from the system menu.
Tip: Some dialogue windows also include the help icon. If clicking on it, the respective help for the dialogue window context is displayed.
- **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.
  - *Sign out*. Signs you out from the groupware.

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

Search bar



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

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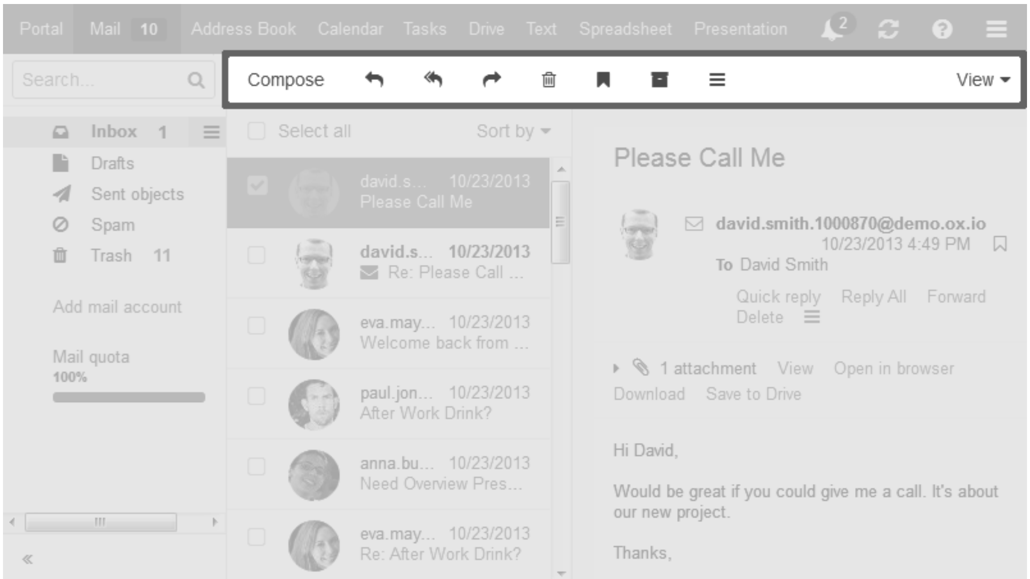
- Input field for the search term
- *Search* icon . Starts a search.
- Search menu. Depending on the app, it contains different search parameters.

The search result is displayed in the display area.

Tool bar



The tool bar is located below the menu bar.

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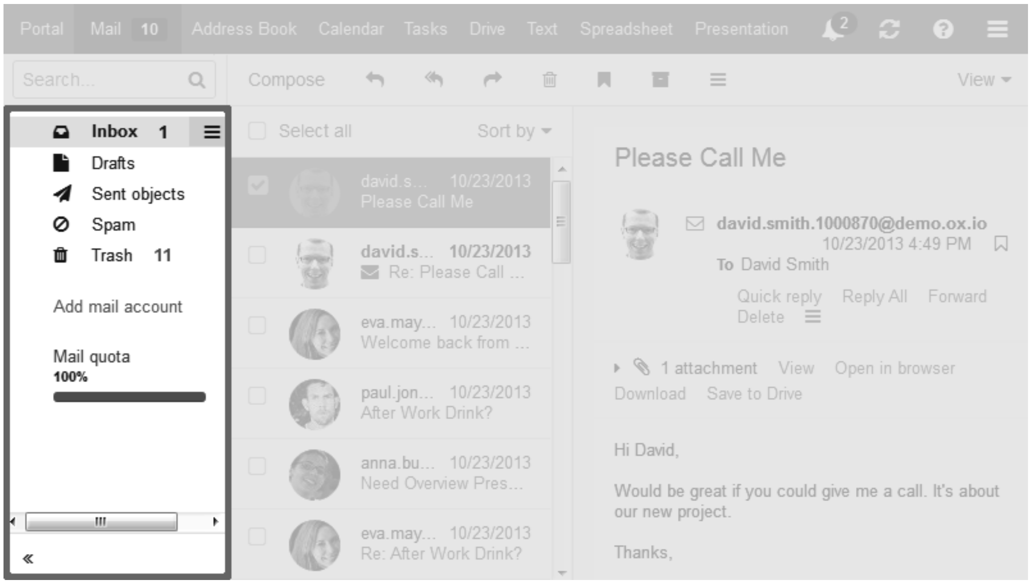
- Buttons for creating new objects, e.g. a new E-Mail or a new contact.
- Buttons or icons for editing objects.
- Depending on the app, additional app specific buttons or icons might be available.
- *Actions* icon ≡ . Contains app specific functions for organising objects.
- *View* button. Contains functions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

Folder tree



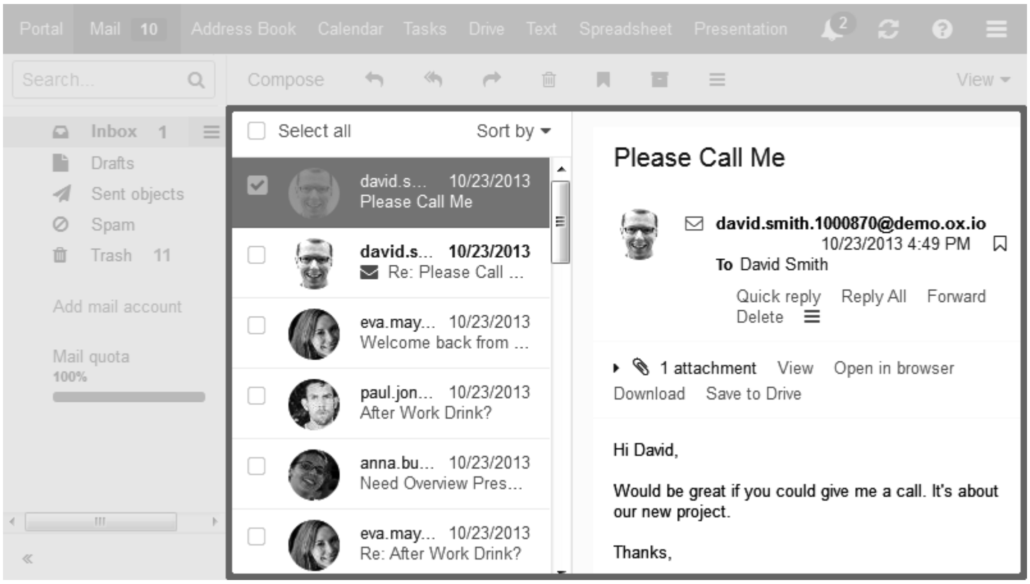
To open or close the folder tree, use one of the following methods:

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

content

- 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.

Display area

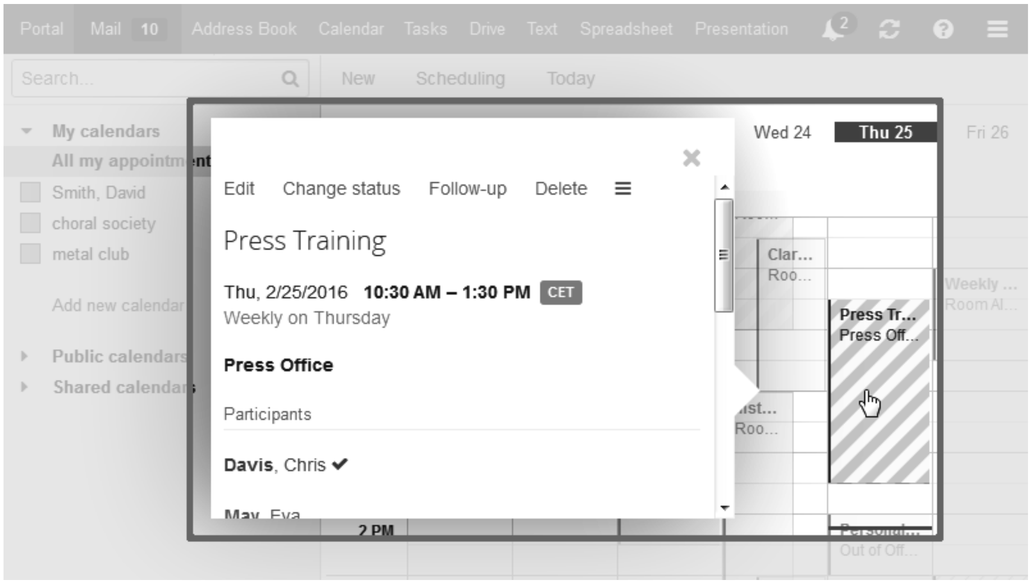


content

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

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

Pop-up

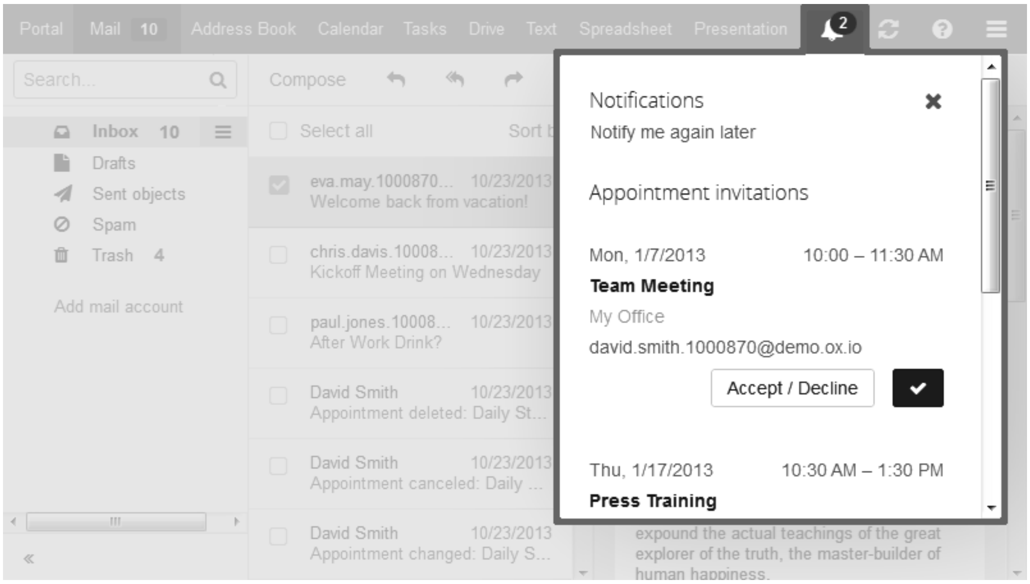


Shows an object's details. In order to open the pop-up, click on a groupware object in the display area. If you read an E-Mail in the display area and click on the name of the sender, the following elements are displayed in the pop-up:

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

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

Notification area



Displays information about the following objects:

- new appointment invitations
- reminders for queued appointments
- queued tasks
- tasks with a due date in the past

In order to open the notification area, click the **Unread badge** icon. If there are notifications, they will be displayed. You can do the following:

- To close the notification area without deleting the notifications, click the **Close** icon. You can also click the icon in the menu bar again.
- If you want to be reminded again later, click on **Notify me again later**.
- To accept or deny appointment invitations, click on the respective button next to the appointment. To mark tasks as done, click on the respective button.

3.2 Keyboard Input

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

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

3.2.1 Keys and key combinations

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

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

3.2.2 Interacting with the user interface via keyboard

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

- To switch between the menu bar, the folder 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, the tool bar, the side bar or the display area, use the cursor keys.
- To select a function, an input field or a check box, use the [Tab] key. The selected element will be highlighted.
  With [Shift]+[Tab] you can select elements in reverse order.
- To execute the function selected, press [Enter].
- To enable or disable a selected checkbox, press the [Space bar].
- To toggle the checkboxes, use the cursor keys.
- To close a pop-up or cancel a dialog window, press [Esc].
- To delete the selected E-Mail messages, folders or files press [Del] or [Backspace].
- To move selected E-Mail messages to the *Archive* folder, press [a].
- To select all objects in the side bar, select one object. Then press [Ctrl]+[a].

3.2.3 Examples of usage

Instructions that show how to use the keyboard controls:

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

How to use the keyboard to send a new email:

1. If the *Email* app is not launched, do the following:
   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* page opens. The input field *To:* is enabled.
3. Enter the recipient's E-Mail address. Press [Enter].
4. Repeatedly press [Tab] until the *Subject* input field is highlighted. Enter the subject. Press [Enter]. The input field for the E-Mail text is enabled.
5. Enter the E-Mail text.
6. To send the E-Mail, repeatedly press [Tab], until the **Send** function is highlighted. Press [Enter]. The E-Mail is sent.
7. To add attachments, repeatedly press [Tab] or [Shift]+[Tab] until the **Attachment** button is highlighted. Press [Enter]. Select **Add local file**.
   A dialogue field for selecting files opens. Depending on the system, use the [Tab] key, the [Enter] key and the cursor keys to select a file and to close the system dialogue.
   Repeatedly press [Tab] until the **Send** button is highlighted. Press [Enter]. The E-Mail is sent.

How to use the keyboard to reply to an email:

1. If the *Email* app is not launched, do the following:
   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 **Quick reply** function or the **Reply all** function is highlighted. Press [Enter] to activate the function.
   You can also repeatedly press [Shift]+[Tab] until the tool bar is highlighted. Use the cursor keys to browse to the **Reply to sender** icon or to the **reply to all recipients** icon . Press [Enter].

3.3 Customising the Basic Settings

How to customise the basic settings:

1. Click the **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 [35].

The following settings are available.

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

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

Language
Defines the user interface language.

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

Refresh interval
Defines the interval for retrieving new objects from the server.

Theme
Defines the colour scheme for the user interface.

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

Default app after sign in
Defines the application that is displayed after login.

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

Automatic opening of notification area
Specifies whether the notification are is automatically opened when receiving a new notification or email.

Show desktop notifications
Defines whether you will receive a desktop notification for new E-Mail messages.

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

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

3.4 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.

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

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

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

3.5 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. In the side bar, click on **Accounts**.
3. Click on **Add account** in the display area. Select a social network from the menu. You will be directed to the social network page where you are asked for your credentials.

   Note: The menu only displays social services for which you have not set up an account in the groupware yet.
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 [45] to set up an account for accessing social networks.

3.7 Manually Downloading and Installing Clients and Apps

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

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

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

How to install clients for workstations or mobile devices:

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

3.8 Using a Wizard to Set Up Clients and Apps

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

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

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

How to use the wizard:

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

4 Portal

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

The portal includes the following components.

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

Depending on 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 [45] new widgets.

Customise this page button
Clicking on this displays a page that allows customizing [45] 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*
Show current information from own social networks.

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

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

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

4.2 Customising the Portal

The following options 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 *Drive* 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, 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. 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 [46].

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
- **Reduce to widget summary** checkbox

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

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

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

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

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

5 E-Mail

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

- The *E-Mail* Components
- display E-Mail messages
- view or save E-Mail attachments
- send email messages
- organize E-Mail 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

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

- Search bar
- Folder tree
- Categories bar
- Tool bar
- Display area
  - List
  - Detail view
  - Pop-up
- View for composing or editing

Search bar
Enables you to search for E-Mail messages

Folder tree
Displays the E-Mail folders.

content

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

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

Functions

- To display the number of E-Mail messages in a folder, hover over the folder name. A tool tip shows the number of E-Mail messages.
- If clicking on a folder, its E-Mail messages are displayed.
- The **Folder-specific actions** icon next to the selected folder offers functions for organising data and app specific folder functions.
- Below the folders there's the button **Add e-mail account** for adding E-Mail accounts.
- In the *Drive* app, the **View all Attachments** button below the folders shows all E-Mail attachments that you have received or sent .
- Depending on the groupware's configuration, additional buttons are available below the folders. Those buttons allow launching a wizard to configure various clients.

Also see

Folders (p. 190)
Navigating within the folder structure (p. 190)
Creating folders (p. 192)
Renaming folders (p. 192)
Moving folders (p. 192)
Deleting folders (p. 192)
Setting up and editing E-Mail accounts (p. 83)
Keys and key combinations (p. 32)

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

Notes

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

Functions

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

Also see

Working with tabs (p. 68)
Displaying email messages (p. 56)

Tool bar

Contains the following:

- **Compose**. Creates a new E-Mail.
- Icons for **replying to** and **forwarding** the selected E-Mail:
- **Delete** icon . Deletes the E-Mail messages selected by you.
- **Move** icon . Opens a menu allowing you to move an E-Mail to a category. This icon is only available if the categories bar is displayed.
- **Set colour** icon . Opens a menu allowing you to assign a coloured label to the E-Mail.
- **Archive** icon . Archives the E-Mail messages selected by you.
- **Actions** icon . Opens a menu with additional functions:
- **View**. Opens a menu with check boxes for controlling the view.
  - Defining the layout of the list and detail view: **Vertically**, **Compact**, **Horizontally**
  - **List**. Shows the list of E-Mail messages. To display the detail view click on an E-Mail. Above the detail view a navigation bar is displayed.
  - **Use categories**. Opens or closes the categories bar.
  - **Configure**. Opens the dialogue window for configuring the categories bar.
  - **Folder view**. Opens or closes the folder tree.
  - **Check boxes**. Displays check boxes for marking objects, in the list.
  - **Contact pictures**. Next to each E-Mail in the list, a contact picture of the sender is displayed, provided the sender saved one in the address book.
  - **Date and time**. Shows the exact date and time when the E-Mail was received.
  - **Message size**. Shows the E-Mail's size instead of the date and time.
  - **All attachments**. Shows all attachment that you have sent or received, in the *Drive* app.

Also see

Instructions for the buttons and icons

Sending a new email (p. 58)
Replying to E-Mail Messages (p. 63)
Forwarding email messages (p. 64)
Deleting E-Mail messages (p. 73)
Categorizing E-Mail messages with coloured labels (p. 70)
Archiving E-Mail messages (p. 73)
Keys and key combinations (p. 32)

Instructions for the functions in the **Actions** menu

Marking email messages as read or unread (p. 70)
Moving email messages (p. 69)
Copying email messages (p. 69)
Printing email messages (p. 72)
Saving email messages (p. 72)
Showing the email source (p. 71)
Creating E-Mail reminders (p. 71)
Adding an email to the portal (p. 72)

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. If you use categories, the E-Mail messages of the selected category are displayed in the inbox.

content

- The following details are displayed for each E-Mail: sender, subject, date or time of the receipt or the E-Mail's size. Unread E-Mail messages are marked with the *Unread* icon .
- If available, additional information is shown: attachment icon, coloured label, number of E-Mail messages in the conversation, priority.

Functions

- To select several E-Mail messages, enable the **Check boxes** check box in 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** check box above the list.
  Note: The **Select all** check box 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** check box in **Sort by**.
  The sorting setting will be applied to the selected E-Mail folder. You can use different settings for the single folders.
- If clicking on an E-Mail, its content is displayed in the display area.

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.

Also see

Displaying email messages (p. 56)
Replying to E-Mail Messages (p. 63)
Forwarding email messages (p. 64)
Organising E-Mail messages (p. 67)
Keys and key combinations (p. 32)

Detail view
Displays the E-Mail that you selected in the list.

content

- Subject
  If E-Mail messages are sorted by conversations, the number of E-Mail messages in a conversation is displayed below the subject. 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.
- Depending on the groupware configuration, a coloured dot next to the name indicates the Messenger status of the sender or recipient.
- **Read** icon . Changes the status from Read to Unread and vice versa.
- The sender's name. The recipient's name. The names of additional E-Mail recipients, if existing. If clicking on a name, a *pop-up* opens. It displays information about the contact.
- Date and time of the receipt.
- **Set colour** icon . Opens a menu allowing you to assign a coloured label to the E-Mail.
- Frequently used functions: **Quick reply**, **Reply all**, **Forward**, **Delete**
- **Actions** icon . Opens a menu with editing functions.
- If the E-Mail contains attachments, additional elements are displayed:
  - **Attachment** icon . If clicking on it, the attachments are displayed as icons or as a list.
  - Buttons that allow applying a function [57] to all E-Mail attachments at once.
  - **Squares** , **List** . Shows the attachments as squares or as a list. To apply a function [57] to a specific attachment, click on the attachment's name in the List view.
- If selecting an E-Mail with an attachment as link in the *Sent items* folder, information about the attachment is displayed at the top of the E-Mail.
- E-Mail text
  Quotes from previous E-Mail messages are marked at the beginning of the line. If the quote is only partially displayed, you can use the **Show quoted text** icon to display the complete quote.

Also see

Pop-up (p. 54)
Viewing or Saving email Attachments (p. 57)
Replying to E-Mail Messages (p. 63)
Forwarding email messages (p. 64)
Inviting all Email recipients to an appointment (p. 81)
Saving all email recipients as a distribution list (p. 81)
Organising E-Mail messages (p. 67)
Keys and key combinations (p. 32)

Pop-up
If clicking on a sender's or recipient's name in the detail view, a pop-up opens.

content

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

Also see

Detail view (p. 53)
Creating a new contact (p. 96)
Sending a new email (p. 58)
Creating new appointments (p. 122)

View for composing or editing
This view is used when creating a new E-Mail or editing an E-Mail draft.

content

- Depending on the groupware configuration, elements that can be either at the top or at the bottom of the screen.
  - **Send**. When having completed the required input, click on this button to send the E-Mail.
  - **Save**. If clicking on this button, the current E-Mail content is saved in the *Drafts* folder.
  - **Cancel**. In order to cancel the process, click on this button. In the next dialogue window, you can choose between some options.
- Your sender address is displayed next to **From**. Depending on your groupware account's settings, you can choose between various sender addresses. In order to select another sender address, click on the address.
- **To** input field. Enter one or several recipients in this field. While entering the recipients, matching suggestions are displayed. To accept a suggestion, click on it.
  To send a copy to other recipients, click on **CC** or **BCC** on the right side of the input field. Enter the addresses of the recipients of the copy or the blind copy in the matching input fields.
  If clicking on **To**, **CC** or **BCC**, a list opens that allows selecting recipients.
- **Subject** input field. Enter your E-Mail's subject in this field.
- **Attachment** button. Click on this button to add local files or files that are saved in the *Drive* app.
- **Signatures** button. Let's you define whether to add a signature to the E-Mail text. Click on the button to select or remove a signature. In the E-Mail settings you can create or edit signatures.
- **Options** button. Click on this button to set specific options: The E-Mail's text format, priority, read receipt.
- Input field for the E-Mail text. Enter the text in the field. If having selected the HTML format from the **Options**, you can format the text or add images.

Also see

Sending a new email (p. 58)
Working with email drafts (p. 71)
Keys and key combinations (p. 32)

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. In the E-Mail settings, you can define whether a notification sound is to be played for incoming E-Mail messages.

How to display an email:

1. Open an email folder in the folder tree.

   When having selected the **Inbox** folder and if you are using categories, you can select a category.
2. In order to select a layout, click on **View** in the tool bar. Enable an entry below *Layout*.
3. To sort the E-Mail list, click on **Sort by** above the list. Enable an entry.

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

   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. To open or close an E-Mail that is part of a conversation, click on a free area between the sender and the date of receipt.
     To open or close all E-Mail messages in the conversation, click the **Open/close all messages** icon on the upper right side of the detail view.
   - If the E-Mail includes a quote from a previous E-Mail, you can display the quote by clicking the **Show quoted text** icon .
   - When having selected **Vertical**, **Compact** or **Horizontal** 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.
   - When having selected **List** from the **View** drop-down in the tool bar, the display area contains a list of all E-Mail messages in the folder. If clicking on an E-Mail, the E-Mail's detail view is displayed. The following functions are available above the detail view, :

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

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

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

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

Also see

Searching for E-Mail Messages (p. 79)
Viewing or Saving email Attachments (p. 57)
Showing the email source (p. 71)

Detail view (p. 53)
List (p. 52)
Pop-up (p. 54)

5.3 Viewing or Saving email Attachments

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

- view or download attachments
- Depending on the groupware configuration, you can display attachments in the *Drive*app .

How to use the email attachment functions:

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

   To show the attachments, click the *Expand* icon on the left side. The attachments are displayed as squares or as a list. To toggle the view, click the **Squares** icon or the **List** icon on the right side.
2. To apply a function to all attachments, click on a button next to the *Attachment* icon .
   - To view the attachments in the *Viewer*, click on **View**. If there is only one attachment, you can use the **Open in browser** function to view it.
     Note: Depending on the file format, those functions might not be available.
   - In order to download the attachments, click on **Download**.
   - To save the attachments in *Drive* [159], click on **Save to Drive**.
3. In order to apply a function to a specific attachment, the following options are available:
   - To view or download a specific attachment or to save it in *Drive*, select it in the list view. Select a function from the menu.
   - To display an attachment in the *Viewer*, select the attachment in the squares view.

Also see

How to view attachments in the *Drive* app: (p. 57)

How to view attachments in the *Drive* app:

Note: Depending on the groupware's configuration, this setting might not be available.

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

   In the *Drive* app, the *My attachments* folder contains the attachments sent or received by you.
2. You can use functions [159] of *Drive*.

Also see

How to use the email attachment functions: (p. 57)

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
- Creating and managing signatures

5.4.1 Sending a new email

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

- compose an E-Mail
- select a sender address
- send copies to other recipients
- select one or multiple recipients from a list of addresses
- add files as attachments
- send file attachments as links
- auto-insert text by adding a signature

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. Press Enter.

   If there are several recipients, repeat the action. Alternatively, you can enter the name of a distribution list [98].

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

   Tips:

   - 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.
   - You can also select the recipients from a list of addresses by clicking on **To**.
   - You can define that the recipients can only see your E-Mail address, not your full name. To do so, proceed as follows:

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

     Enable **Hide names**.
3. Enter a subject.
4. Enter the email text.

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

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

   Select the text content.

   Click an element in the formatting bar.
5. If you use the HTML format, you can insert images into the text. To do so, proceed as follows:

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

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

   In order to remove an image from the text, select the image. Press the delete key on your keyboard.
6. In order to show additional options, click on **Options**. You can use the following options: set the priority, attach your vCard, request a delivery receipt
7. Click on **Send**.

Also see

How to select your sender address on the *Compose* page: (p. 60)
How to send copies to other recipients on the *Compose* page: (p. 60)
How to select a recipient from a list of addresses on the *Compose* page: (p. 61)
How to add attachments to an E-Mail on the *Compose* page: (p. 61)
How to send attachments as a link on the *Compose* page: (p. 62)
How to add a signature to the E-Mail text on the *Compose* page: (p. 63)
Replying to E-Mail Messages (p. 63)
Forwarding email messages (p. 64)
View for composing or editing (p. 55)

How to select your sender address on the *Compose* page:

1. If you have set up external E-Mail accounts [83], you can use those addresses as sender addresses. To do so, proceed as follows:

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

   Select an E-Mail address from the list.

   Note: Depending on the folder selected, a defined sender address will be preset.

2. You can define the names to be displayed with your E-Mail addresses. To do so, proceed as follows:

   Click on **Edit name**. The *Edit real names* window opens.

   Enable the checkbox of the name that you want to edit. Edit the name. Click on **Save**.

   In order to display the sender addresses without names, click on **Hide names**.

Also see

How to send a new email: (p. 59)
How to send copies to other recipients on the *Compose* page: (p. 60)
How to select a recipient from a list of addresses on the *Compose* page: (p. 61)
How to add attachments to an E-Mail on the *Compose* page: (p. 61)
How to send attachments as a link on the *Compose* page: (p. 62)
How to add a signature to the E-Mail text on the *Compose* page: (p. 63)

How to send copies to other recipients on the *Compose* page:

Depending on whether the recipients are to see who gets a copy, use the input fields **CC** or **BCC**.

1. If the recipients are to see who gets a copy of the E-Mail, click on **CC** on the right side of the *To* field. Enter the E-Mail address of the copy's recipient in the **CC** field.

2. If you want to prevent the recipients from seeing who gets a copy of the E-Mail, send a blind copy. To do so, click on **BCC** on the right side of the *To* field. Enter the E-Mail address of the blind copy's recipient in the **BCC** field.

Tips:

- With drag and drop you can move the recipients between the fields *To*, *CC* and *BCC*.
- You can also select the recipients from a list of addresses by clicking on **CC** or on **BCC**.
- In the E-Mail settings, you can determine that each outgoing E-Mail can also be sent as blind copy to a specific E-Mail address.

Also see

How to send a new email: (p. 59)
How to select your sender address on the *Compose* page: (p. 60)
How to select a recipient from a list of addresses on the *Compose* page: (p. 61)
How to add attachments to an E-Mail on the *Compose* page: (p. 61)
How to send attachments as a link on the *Compose* page: (p. 62)
How to add a signature to the E-Mail text on the *Compose* page: (p. 63)

How to select a recipient from a list of addresses on the *Compose* page:

1. Click on one of the buttons **To**, **CC** or **BCC** on the left side of the address input fields. The *Select contacts* window opens.
2. Select one or several contacts.
   You have the following options for finding a specific contact:
   - Enter a name in **Search**. While entering the recipients, matching suggestions are displayed. To accept a suggestion, click on it.
   - If multiple address books are available, you can select one.

   The selected contacts are displayed below the list. To undo the selection, click on **Clear selection**.
3. To accept the selected contacts in the input fields **To**, **CC** or **BCC**, click on **Select**.

Also see

How to send a new email: (p. 59)
How to select your sender address on the *Compose* page: (p. 60)
How to send copies to other recipients on the *Compose* page: (p. 60)
How to add attachments to an E-Mail on the *Compose* page: (p. 61)
How to send attachments as a link on the *Compose* page: (p. 62)
How to add a signature to the E-Mail text on the *Compose* page: (p. 63)

How to add attachments to an E-Mail on the *Compose* page:

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

Notes:

- As long as the attachments are being uploaded, a progress bar is displayed below the folder tree.
- Depending on the groupware configuration, attachments will not be sent when having reached a certain size limit. In this case, the attachment will be saved in the *E-Mail attachments* folder in the *Drive* app. The E-Mail includes a link to the attachment.

Also see

How to send a new email: (p. 59)
How to select your sender address on the *Compose* page: (p. 60)
How to send copies to other recipients on the *Compose* page: (p. 60)
How to select a recipient from a list of addresses on the *Compose* page: (p. 61)
How to send attachments as a link on the *Compose* page: (p. 62)
How to add a signature to the E-Mail text on the *Compose* page: (p. 63)

How to send attachments as a link on the *Compose* page:

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

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

1. Select the files to be sent as attachments.
   - To send a local file as a link, click on **Attachments**. Click on **Add local file**. Select one or more files.
     Tip: You can also add an attachment by dragging one or several files from a file browser or from the desktop to the E-Mail window and dropping them below the **Attachments** button.
   - In order to use the current version of a file from the *Drive* app as an attachment, click on **Attachments**. Click on **Add from Drive**.
     Open a folder in the *Add attachments* window. Select one or several files. Click on **Add**.
2. You can use the following functions:
   - In order to remove an attachment, click the **Delete attachment** icon .
   - In order to hide or show the attachments click on the button with the attachment icon.
3. Click on **Use Drive Mail** . Additional functions are displayed.
   - To set the expiration date for the public link, click on **Expiration**. Select an entry.
     If the attachment is to be deleted after the expiration date, enable **Delete if expired**.
   - To receive notifications for specific events, click on **Notification**. Enable the desired entries.
     Note: Depending on the server configuration, this function might not be available.
   - To protect the public link with the attachments with a password, enable the checkbox. Enter a password.

Notes:

- As long as the attachments are being uploaded, a progress bar is displayed below the folder tree.
- In the *Sent objects* folder, the E-Mail is marked with the icon. When viewing the E-Mail. the following information is displayed at the top of the E-Mail text.
  - A link to the folder containing the attachment.
  - Information about the expiration date and a possibly used password.
  - A list of the attachments' file names.

Also see

How to send a new email: (p. 59)
How to select your sender address on the *Compose* page: (p. 60)
How to send copies to other recipients on the *Compose* page: (p. 60)
How to select a recipient from a list of addresses on the *Compose* page: (p. 61)
How to add attachments to an E-Mail on the *Compose* page: (p. 61)
How to add a signature to the E-Mail text on the *Compose* page: (p. 63)

How to add a signature to the E-Mail text on the *Compose* page:

When having set up signatures, you can add a signature to the E-Mail text. To do so, proceed as follows:

Click on **Signatures**.

Select a signature from the list.

Also see

Creating and managing signatures (p. 65)
How to send a new email: (p. 59)
How to select your sender address on the *Compose* page: (p. 60)
How to send copies to other recipients on the *Compose* page: (p. 60)
How to select a recipient from a list of addresses on the *Compose* page: (p. 61)
How to add attachments to an E-Mail on the *Compose* page: (p. 61)
How to send attachments as a link on the *Compose* page: (p. 62)

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 cited line is marked at the beginning.

How to reply to an email:

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

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

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

Also see

How to send a new email: (p. 59)
How to forward an email: (p. 64)
How to automatically forward email messages: (p. 65)
How to create and activate a vacation notice: (p. 65)

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 **Forward** button in the detail view.
3. Select one or more recipients. Information can be found in How to send a new email: (page 59).
4. Enter the E-Mail text. You can use additional functions e.g., E-Mail attachments.
5. Click on **Send**.

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

Also see

How to send a new email: (p. 59)
How to reply to an email: (p. 63)
How to automatically forward email messages: (p. 65)
How to create and activate a vacation notice: (p. 65)

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. Select the entry **E-Mail** in the side bar. Click on **Auto Forward**.
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**.

Also see

How to send a new email: (p. 59)
How to reply to an email: (p. 63)
How to forward an email: (p. 64)
How to create and activate a vacation notice: (p. 65)

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. Select the entry **E-Mail** in the side bar. Click on **Vacation Notice**.
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 sending of the vacation notice by enabling at least one checkbox below *Enabled for the following addresses*.

   To deactivate the vacation notice, disable all checkboxes.

Tip: The vacation notice is entered as E-Mail filter [76]. You can also edit the vacation notice in the E-Mail filter settings.

Also see

How to send a new email: (p. 59)
How to reply to an email: (p. 63)
How to forward an email: (p. 64)
How to automatically forward email messages: (p. 65)

5.4.6 Creating and managing signatures

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

- create new signature
- edit, delete signatures; set default signature

You can create signatures in the plain text or HTML format.

How to create a new signature:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select the entry **E-Mail** in the side bar. Click on **Signatures**.
3. In the display area, click on **Add new signature**. The *Add signature* window opens.
4. Enter a name for the signature.
   Enter the text for the signature. In order to format the text, select single text contents and click on an element in the formatting bar.
   Define whether the signature is to be entered below or above the E-Mail text.
5. Click on **Save**.

Also see

How to manage existing signatures: (p. 66)
How to add a signature to the E-Mail text on the *Compose* page: (p. 63)

How to manage existing signatures:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select the entry **E-Mail** in the side bar. Click on **Signatures**.
3. Use the following methods:
   - In order to edit a signature's text, click on **Edit** next to the signature.
   - To define a signature to be used as default when composing a new message, select a signature in **Default signature for new messages**.
   - To define a signature to be used as default when replying to or forwarding a message, select a signature in **Default signature for replies or forwards**.
   - In order to delete a signature, click the **Delete** icon next to the signature.

Also see

How to create a new signature: (p. 66)
How to add a signature to the E-Mail text on the *Compose* page: (p. 63)

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 190).

The following options are available:

- Working with tabs
- Moving email messages
- Copying email messages
- Marking email messages as read or unread
- Collecting addresses
- Categorizing E-Mail messages with coloured labels
- Showing the email source
- Working with email drafts
- Creating E-Mail reminders
- Adding an email to the portal
- Saving email messages
- Importing email messages
- Printing email messages
- Archiving E-Mail messages
- Deleting E-Mail messages
- Cleaning up E-Mail folders
- Editing multiple email messages at once
- Using Unified Mail
- Using E-Mail filters

5.5.1 Working with tabs

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

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

How to enable or disable the usage of tabs:

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

Also see

How to assign incoming E-Mail messages in the inbox to categories: (p. 68)
How to edit the tab view: (p. 68)

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

1. Select the **Inbox** folder in the folder tree.
   Select a category from the categories bar. E-Mail messages that have not been assigned to a category yet, are displayed in the **General** category.
2. Drag an E-Mail from the list to a category in the categories bar and drop it there.
   You can also select an E-Mail. Click the **Move** icon in the tool bar. Select a category from the menu.
   A pop-up window notifies you that the E-Mail has been moved to the category.
3. In order to finish the process, do one of the following:
   - In order to only move the selected E-Mail to the category, close the pop-up window.
   - In order to move all existing and future incoming E-Mail messages from this sender to the category, click on *Move all messages*.

Also see

How to enable or disable the usage of tabs: (p. 68)
How to edit the tab view: (p. 68)

How to edit the tab view:

1. Click on **View** in the tool bar. Click on **Configure** below *Inbox*.
   You can also double-click or right-click on a category in the categories bar.
   The *Configure categories* window opens.
2. To enable or disable a tab, enable or disable the respective checkbox.
   To rename a tab, edit the respective text.
   Note: Some tabs cannot be edited.
   In order to hide the categories bar, click on **Disable categories**.
3. Click on **Save**.

Also see

How to enable or disable the usage of tabs: (p. 68)
How to assign incoming E-Mail messages in the inbox to categories: (p. 68)

5.5.2 Moving email messages

The following options are available:

- You can move an individual E-Mail or a complete E-Mail conversation to another folder.
- Move all E-Mail messages in an E-Mail 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 **Actions** 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.

Tips:

- To move E-Mail messages from a specific sender to a folder, you can create a new rule when moving E-Mail messages.
- You can also move multiple E-Mail messages at once.
- 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.

Also see

How to move all E-Mail messages in a folder: (p. 69)
How to copy an email: (p. 69)

How to move all E-Mail messages in a folder:

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

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

Also see

How to move an email: (p. 69)
How to copy an email: (p. 69)

5.5.3 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 **Actions** 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.

Also see

How to move an email: (p. 69)

5.5.4 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 E-Mail as unread or read:

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

   You can also use the **Actions** icon or click the **Read** icon in the detail view. The icon changes to the **Unread** icon .
3. In order to mark this E-Mail as read, analogously do the same.

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

Also see

How to mark all email messages in a folder as read: (p. 70)

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**.

Also see

How to mark an E-Mail as unread or read: (p. 70)

5.5.5 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.

5.5.6 Categorizing 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.

5.5.7 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 **Actions** icon ≡ in the tool bar. Select **View source** from the menu. The source is displayed in the *View source* window.

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

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

5.5.8 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:

Click on the *Save* button on the *Compose* page.

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

Also see

How to send a saved email draft: (p. 71)

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**.

Also see

How to save an email as a draft: (p. 71)

5.5.9 Creating E-Mail reminders

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

How to create an E-Mail reminder:

1. Select an E-Mail.
2. Click the **Actions** icon ≡ in the tool bar. Select **Reminder** from the menu.

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

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

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

Also see

Creating Tasks (p. 149)

5.5.10 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 **Actions** icon≡ in the tool bar. Click on **Add to portal** in the menu.

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

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

Also see

Customising the Portal (p. 45)

5.5.11 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 **Actions** 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.

Also see

Importing email messages (p. 72)

5.5.12 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 a file browser or from the desktop to the *E-Mail* app window. Drop the EML file in the list in the display area.

Also see

Saving email messages (p. 72)

5.5.13 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 **Actions** 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.

5.5.14 Archiving E-Mail messages

When archiving E-Mail messages, those E-Mail messages are moved to the *Archive* folder. The *Archive* folder contains a separate 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 use this function. The following options are available:

- Archive a folder's E-Mail messages that are older than 90 days.
- Archive individual E-Mail messages.

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**.

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

Also see

How to archive individual E-Mail messages: (p. 73)

How to archive individual E-Mail messages:

1. Select one or several E-Mail messages.
2. Click the **Archive** icon in the tool bar.
   You can also use the [a] key.

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

Also see

How to archive an E-Mail folder's content: (p. 73)

5.5.15 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. You can also permanently delete all E-Mail messages from the trash by emptying the trash.

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

How to delete 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 **Delete** button in the detail view.

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

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

Also see

How to recover deleted email messages: (p. 74)
How to delete all email messages in a folder: (p. 74)
How to permanently delete an email from the Trash folder: (p. 74)
How to permanently delete the content of the Trash folder: (p. 75)

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 the **Delete all messages** button.

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

Also see

How to recover deleted email messages: (p. 74)
How to delete email messages: (p. 74)
How to permanently delete an email from the Trash folder: (p. 74)
How to permanently delete the content of the Trash folder: (p. 75)

How to recover deleted email messages:

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

Also see

How to delete email messages: (p. 74)
How to delete all email messages in a folder: (p. 74)
How to permanently delete an email from the Trash folder: (p. 74)
How to permanently delete the content of the Trash folder: (p. 75)

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. Select 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.

Also see

How to recover deleted email messages: (p. 74)

How to delete email messages: (p. 74)
How to delete all email messages in a folder: (p. 74)
How to permanently delete the content of the Trash folder: (p. 75)

How to permanently delete the content of the Trash folder:

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

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

Result: The objects in the trash are permanently deleted.

Also see

How to recover deleted email messages: (p. 74)
How to delete email messages: (p. 74)
How to delete all email messages in a folder: (p. 74)
How to permanently delete an email from the Trash folder: (p. 74)

5.5.16 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.

Also see

Deleting E-Mail messages (p. 73)

5.5.17 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
- Categorizing E-Mail messages with coloured labels
- Deleting E-Mai messagels
- 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 when loading the E-Mail list, only a certain percentage of the E-Mail messages in a folder will be loaded by the server if their number exceeds a defined limit. If browsing to the bottom of the list, the next part will be loaded.
2. Select a function from the tool bar.

   You can also select one of the available functions in the detail view. The functions in the detail view have effect on all E-Mail messages in the folder, not only on the currently visible E-Mail messages.

5.5.18 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. In the side bar, click on **Accounts**.
3. Click on **Edit** next to an external E-Mail account in the display area. The settings are displayed in a pop-up.
4. Enable **Use Unified Mail for this account**.

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

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

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

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

5.5.19 Using E-Mail filters

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

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

- The E-Mail is marked as read.

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

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

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.
- To move E-Mail messages from a specific sender to a folder, you can create a new rule when moving E-Mail messages.
- Changing existing rules.

Some E-Mail functions automatically set up filters, e.g.: the vacation notice [65].

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. Select the entry **E-Mail** in the side bar.

   Click on **Filter rules**.
3. In the display area, click on **Add new rule**. The *Create new rule* window opens.
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. Please note the following:
   - In order to use an E-Mail part that is not contained in the list, select **Header**. Enter a header entry in the *Name* input field. You can display an E-Mail's header by Viewing the source data [71].
   - In order to consider the *BCC* part, select **Envelope - To**. Envelope includes the E-Mail recipients entered in the *To*, *CC* or *BCC* field.
   - In order to use a part of the E-Mail content in the condition, select **Content**.
   - In order to use the date of receipt in the condition, select **Current Date**.

   Select a criterion from the drop-down next to the E-Mail part. 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 create a new rule when moving an E-Mail

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

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

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

How to search for E-Mail messages:

1. Click the **Start search** icon or in the input field in the search bar. The folder button indicates the folders to be searched.

2. To select a folder for the search, click on the folder button.
   - If you select **All folders**, all folders and subfolders of the internal E-Mail account are searched. **Note:** Depending on the E-Mail server, this function might not be available. In this case, only the current folder will be searched, no subfolders.
   - If you select a specific folder or the folder of an external E-Mail account, only this folder is searched, but no subfolders.
3. Enter a search term in the input field. The search menu opens.

   Define the data sources to be searched by clicking on an entry in the search menu.
   - If clicking on the search term or pressing enter, the following data sources are searched: sender, recipient, subject, E-Mail text
   - In order to search for E-Mail messages within a specific time range, use a valid time range as a search term. As soon as a valid time range is recognized in your input, the time range is displayed in the search menu. Click on the time frame.
   - In order to only search in the subject, click on **in subject**.
   - In order to only search in the E-Mail text, click on **in mail text**.
   - In order to search for senders or recipients matching the search term, click on a name.

   Result:

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

   For each search result, the folder with the found object is displayed. To finish the search and display the folder content, click on the folder.
4. You have the following options for adjusting the search results:
   - If using a person's name as search term, you can define whether to search for the name in the sender, recipient or in both. To do so, click the icon next to the name.
   - To refine the search result, enter further search terms: To remove a search term, click the icon next to the search term.
   - To search in another folder, click on the folder button.
5. In order to finish the search, click the **Cancel search** icon in the input field.

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.

  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. Click on **Email** in the side bar.
3. At the bottom of the display area click on **Change IMAP 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.
   Select **Invite to appointment** from the menu.
3. Complete the data for Creating an appointment [122].

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.
   Select **Save as distribution list** from the menu.
3. Complete the data for Creating a distribution list [98].

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 E-Mail accounts.
- You can then use the external E-Mail accounts.

You can change the folders of your primary E-Mail account by assigning other folders to the default folders.

5.8.1 Setting up and editing E-Mail accounts

The following options are available:

- setting up external E-Mail accounts
- editing E-Mail accounts
- deleting external E-Mail accounts

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. In the side bar, click on **Accounts**.
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**.

   An encrypted connection with the server is trying to be established. If this does not work, you can decide whether you want to continue the procedure without encryption.
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. In the side bar, click on **Accounts**.
3. Click on **Edit** next to an account in the display area. The settings are displayed in a 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. In the side bar, click on **Accounts**.
3. Click the **Delete** icon

5.8.2 Using external E-Mail accounts

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 76).

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 [58]. Click on **Send**.

5.8.3 Changing the folders of the primary E-Mail account

You can change the folders of your primary E-Mail account by assigning other folders to a default folder.

How to assign other folders to the folders of your primary E-Mail account:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Accounts**.
3. Click on **Edit** next to *E-Mail* in the display area. The settings are displayed in a pop-up.
4. Scroll down to *Standard folders*.
   Click on **Select** next to a folder. Select another folder.
5. Click on **Save** at the bottom of the pop-up.

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

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
- Ask for mailto link registration
- Append vCard
- Insert the original Email text into a reply?
- Forward Email Messages as
- Format e-mail messages as
- Default sender address
- Auto-save email drafts
- Always add the following recipient to blind carbon copy (BCC)
- Allow HTML formatted Email messages?
- Allow pre-loading of externally linked images
- Colour quoted lines
- Show requests for read receipts
- Notification sounds
- Change IMAP subscriptions

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.

Ask for mailto link registration
Defines whether the groupware can ask for a mailto link registration.

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 **Attachment** option, the text is sent as an attachment to the new E-Mail.

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.

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 [83], 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.

Always add the following recipient to blind carbon copy (BCC)
To send each outgoing E-Mail as blind copy (BCC) to an E-Mail address, enter the wanted E-Mail address in this field.

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.

Notification sounds
Defines whether a sound is played for incoming E-Mail messages. You can select between different sounds.
Note: Your browser has to allow the groupware server to send notifications.

Change IMAP subscriptions
Contains functions for subscribing [81] to email folders.

6 Address Book

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

- The *Address Book* Components
- view contacts
- view or save contact attachments
- create and add contacts from various sources
- combine several contacts into distribution lists
- 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 launch the *Address Book* app:

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

6.1 The *Address Book* Components

The *Address Book* app includes the following components.

- Search bar
- Folder tree
- Tool bar
- Navigation bar
- Display area
    - List
    - Detail view
- View for creating or editing

Search bar
Enables you to search for contacts.

Folder tree
Displays the contacts folders

content

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

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

Functions

- If clicking on a folder its contacts are displayed.
- The **Folder-specific actions** icon next to the selected folder offers functions for organising data and for exchanging data.
- Buttons in the folder tree offer functions for creating folders.
- Depending on the groupware's configuration, additional buttons are available below the folders. Those buttons allow launching a wizard to configure various clients.

Also see

Folders (p. 190)
Navigating within the folder structure (p. 190)
Creating folders (p. 192)
Renaming folders (p. 192)
Moving folders (p. 192)
Deleting folders (p. 192)

Tool bar

Contains the following:

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

Also see

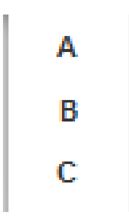
Instructions for the buttons and icons

Creating a new contact (p. 96)
Sending Email Messages from within an address book (p. 99)
Inviting contacts to an appointment (p. 99)
Editing contacts (p. 99)
Deleting Contacts (p. 101)
Keys and key combinations (p. 32)

Instructions for the functions in the **Actions** menu≡

Sending contacts as vCard (p. 100)
Printing Contacts (p. 101)
Moving Contacts (p. 100)
Copying Contacts (p. 100)
Adding contacts as XING contacts (p. 101)

Navigation bar



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

Also see

Displaying Contacts (p. 93)

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

List
Displays the names of the contacts in the opened address book.

content

- The following details are displayed for each contact: name, primary E-Mail address.
- Depending on the groupware configuration, a coloured dot next to the name indicates the Messenger status of the contact.
- The text above the list contains the name of the selected folder. The number corresponds to the number of objects in the selected folder.

Functions

- To select several contacts, enable the **Check boxes** check box in the **View** drop-down in the tool bar.
  You can also use your system's multi-selection functions.
  In order to select all contacts in the currently selected folder, enable the **Select all** checkbox above the list.
- If clicking on a contact, its data is displayed in the detail view.

Also see

Searching for Contacts (p. 103)
Editing multiple contacts at once (p. 101)
Keys and key combinations (p. 32)

Detail view
Shows the data of the contact that you selected in the list.

content

- Picture, name, job position, profession
- Depending on the groupware configuration, a coloured dot next to the name indicates the Messenger status of the contact.
- Business and private addresses. In the address book settings, you can define whether a map service should be used when clicking on an address.
- Business and private phone numbers
- E-Mail addresses. If clicking on an E-Mail address, a page for sending a new E-Mail opens.

The extent of information displayed can vary.

Also see

Viewing or Saving Contact Attachments (p. 94)
Sending Email Messages from within an address book (p. 99)
Organising Contacts (p. 99)
Keys and key combinations (p. 32)

View for creating or editing
This view is used when creating a new contact or editing an existing one.

content

- Depending on the groupware configuration, elements that can be either at the top or at the bottom of the screen.
  - **Save** button. If clicking on this button, the current contact data are saved and the editing page is closed.
  - **Discard** button. In order to cancel the creation or editing, click on this button.
  - **Show all fields** checkbox. By default, only the data fields that are most frequently used are displayed. In order to display all available data fields, enable this checkbox.
- **Personal information** input fields. Enter the title, name, birthday, and additional personal data.
  If you enable the checkbox **Display all fields** on top of the page, additional elements are displayed.
  - Input fields for the middle name, name extension, URL.
  - **This contact is private** checkbox. If the contact is not to be displayed when its folder is being shared, enable this checkbox.
- **Job description** input fields. Enter the contact's business data in those fields.
  If you enable the checkbox **Display all fields**, additional input fields are displayed.
- Input fields **Messaging**, **Phone and fax numbers**. Enter E-Mail addresses, other messaging addresses, phone numbers and fax numbers in those fields.
  If you enable the checkbox **Display all fields**, additional input fields are displayed.
- **Home address** input fields. Enter the contact's private address in those fields.
  If you enable the checkbox **Display all fields**, the input fields **Business address** and **Additional address** are displayed.
- **Comments** input field. Use this field to enter information.
- If you enable the checkbox **Display all fields**, additional data fields for individual entries are displayed below **Custom fields**.
- **Add attachments** button below **Attachments**. Click on this button to attach one or several files to the contact data.

Also see

Creating a new contact (p. 96)
Editing contacts (p. 99)
Keys and key combinations (p. 32)

6.2 Displaying Contacts

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

How to display a contact:

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

Also see

Searching for Contacts (p. 103)
Viewing or Saving Contact Attachments (p. 94)
The Halo View (p. 95)

6.3 Viewing or Saving Contact Attachments

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

- display a preview of the attachment
- open the attachment in the browser
- download the attachment
- save the attachment to *Drive* [159]

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

How to use the contact attachment functions:

1. Select a contact with an attachment.
2. Click on an attachment's name in the detail view. 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, E-Mail addresses, phone numbers
- If the *Messenger* app is available in your groupware, the call history with this contact is displayed. If clicking on the **Show full history** button, the call history is displayed in the *Messenger* app.
- your current correspondence with this contact
- shared appointments with this contact
- Information about this person from social networks. You can use the available buttons to open this person's profile.

How to display a contact in the halo view:

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

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

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

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

6.5 Adding Contacts

The following options are available:

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

6.5.1 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.
   A description of the input fields can be found in View for creating or editing (page 92).
4. To add attachments to the contact, click on **Add attachments** below *Attachments*. Select one or multiple files.
   In order to remove an attachment, click the **Delete** icon .
   Tip: You can also add an attachment by dragging and dropping a document from a file browser or from the desktop to the contact's window.
5. Click on **Save**.

Also see

Creating distribution lists (p. 98)
Adding a contact from vCard (p. 96)
Importing contacts from files (p. 97)
Importing contacts from social networks (p. 97)
View for creating or editing (p. 92)

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

Also see

Creating a new contact (p. 96)
Importing contacts from files (p. 97)
Importing contacts from social networks (p. 97)
View for creating or editing (p. 92)

6.5.3 Importing contacts from files

Information on importing contacts from various files can be found in Importing Data (page 210).

6.5.4 Importing contacts from social networks

You can import the contacts from your social networks to a contacts folder by subscribing to the contacts. Information can be found in Subscribing to data (page 206)

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 **Name** field.
4. Enter a participant's E-Mail address in the *Participants* field.
   Tip: While entering the E-Mail address, several matching suggestions are displayed. To accept a suggestion, use one of the following methods:
   - Use the scroll bar to browse the list. Click on a suggestion.
   - Use the cursor keys to select a suggestion. Press Enter.

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

Also see

Creating a new contact (p. 96)
View for creating or editing (p. 92)

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 190).

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.

Also see

Sending a new email (p. 58)

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. Click on **Invite** in the tool bar.
3. Complete the details for creating an appointment.

Also see

Creating new appointments (p. 122)

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**.

Also see

View for creating or editing (p. 92)

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 **Actions** 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.

Also see

How to copy a contact to another folder: (p. 100)

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 **Actions** icon ≡ in the tool bar. Select **Copy** from the menu.
3. Select a folder in the *Copy* window. Click on **OK**.

Also see

How to move a contact to another folder: (p. 100)

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 **Actions** icon ≡ in the tool bar. Click on **Send as vCard** in the menu.
3. Fill in the details for sending a new E-Mail.

Also see

Sending a new email (p. 58)

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 **Actions** icon ≡ in the tool bar. Click on **Add to XING** in the menu.

Also see

How to invite a contact to XING: (p. 101)

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 **Actions** icon ≡ in the tool bar. Click the menu entry **Invite to XING**.

Also see

How to add a contact as an XING contact: (p. 101)

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, department, address
- Folders that are to be searched
- Type: all, contact, distribution list
- Folder type: all, private, public, shared

How to search for contacts:

1. Click the **Start search** icon or in the input field in the search bar. The folder button indicates the folders to be searched. The **Options** drop-down offers functions for limiting the search.

2. To select a folder for the search, click on the folder button.
   - If you select **All folders**, all private, public, and shared folders and subfolders are searched.
   - If you select a specific folder or the folder, only this folder is searched, but no subfolders.

3. Enter a search term in the input field. The search menu opens.

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

   Result:

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

4. You have the following options to adjust the search result:
   - To refine the search result, enter additional search terms: To remove a search term, click the icon next to the search term.
   - To search in another folder, click on the folder button. Select a folder.
   - To limit the search to private, public or shared folders, click on **Options**. Select a folder type.
   - To limit the search to contacts or distribution lists, click on **Options**. Select a type.

5. In order to finish the search, click the **Cancel search** icon.

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 or external partners, proceed as follows:
    Create a new personal or public folder where you can copy or move the wanted contacts to.
    Share this folder.

  You can also share an existing folder.
- If another internal user shared a contact folder with you, you can access this folder in the folder tree.

6.10 Interchanging Contacts with Other Applications

The following options are available:

- export [215] contacts to use them in other applications
- import [210] 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. Click on **Address Book** in the side bar.
3. Change the settings [106].

The following settings are available.

- Initial folder
- Display of names
- Link postal addresses with map service

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

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

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

7 Calendar

Learn how to work with the *Calendar* application.

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

How to launch the *Calendar* app:

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

7.1 The *Calendar* Components

The *Calendar* app includes the following components.

- Search bar
- Folder tree
- Tool bar
- Display area
    - *Day*, *Work week*, *Week* or *Month* calendar view.
    - Date picker
    - Pop-up
    - List
    - Detail view
- Scheduling view
- View for creating or editing

Search bar
Enables you to search for appointments.

Folder tree
Displays the calendar folders.

content

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

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

Functions

- If clicking on a calendar, appointments within that calendar are displayed.
- The **Folder-specific actions** icon next to the selected calendar offers functions for organising data, for exchanging data and for selecting a calendar color.
  Note: The colour selection drop down and the colour icons next to the folder names are only displayed if **Custom colours** is enabled in the **View** menu in the tool bar.
- Buttons in the folder tree offer functions for creating calendars.
- The **All my appointments** folder contains all your appointments from all calendars.
- Depending on the groupware's configuration, additional buttons are available below the folders. Those buttons allow launching a wizard to configure various clients.

Also see

Using calendar colours (p. 131)
Folders (p. 190)
Navigating within the folder structure (p. 190)
Creating folders (p. 192)
Renaming folders (p. 192)
Moving folders (p. 192)
Deleting folders (p. 192)
Keys and key combinations (p. 32)

Tool bar
Contains the following elements in the calendar views:

- **New**. Creates a new appointment.
- **Scheduling**. Opens the scheduling view for scheduling appointments with multiple participants.
- **Today**. Selects the time frame with the current day.
- **View**. Opens a menu with check boxes for controlling the view.
  - **Day**, **Work week**, **Week** or **Month**. Allows selecting a calendar view.
  - **List**. Activates the list view.
  - **Folder view**. Opens or closes the folder tree.
  - Appointment colours
    - **Classic colours**. Displays the appointments in light colours.
    - **Dark colours**. Displays the appointments in dark colours.
    - **Custom colours**. You can define the colour in which an appointment is displayed.
  - If the list view is selected and **check boxes** are enabled, check boxes for marking objects are displayed in the list.
  - **Print**. Opens the print preview for printing a calendar sheet.

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

- **Edit**. Edits an appointment's data.
- **Status**. Changes the status of the appointment confirmation.
- **Delete**. Deletes the appointments selected by you.
- **Actions** icon≡ . Opens a menu with additionalfunctions:

Also see

Instructions for the buttons and icons

Creating Appointments (p. 121)
Scheduling appointments with several participants (p. 125)
Editing appointments (p. 129)
Changing the appointment status (p. 130)
Deleting appointments (p. 133)
Keys and key combinations (p. 32)

Instructions for the functions in the **Actions** menu≡

Printing appointments (p. 132)
Moving appointments to another folder (p. 132)
Editing multiple appointments at once (p. 133)

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 **Browse** icons ‹ › on the top left side of the calendar sheet allow going back or forth within the calendar.
- In the calendar views *Day*, *Work week*, and *Week*, the date and calendar week are displayed next to the **Browse** icon.
  If clicking on the date, the date picker opens.
  The area between the date and the calendar sheet can be used for creating all-day appointments.
  On the left side of the calendar sheet, the timezone is displayed above the dates. To add an additional column with dates in another timezone, click on the timezone.
  The red line in the calendar sheet displays the current time.
- In the *Work week*, *Week* and *Month* views the current day in the calendar sheet is highlighted with a red background.
- In the *Month* view, the selected month and the year are displayed above the calendar sheet.
- Depending on the confirmation status and the colour theme, the appointments are highlighted with different colours.
  If there are additional appointments above or below the visible calendar sheet, arrows are displayed at the top or the bottom of the calendar sheet for the respective day.

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

Also see

Date picker (p. 112)
Scheduling view (p. 115)
Pop-up (p. 113)
Viewing Appointments (p. 117)
How are appointments displayed? (p. 118)
Creating Appointments (p. 121)
Managing Appointments (p. 129)
Keys and key combinations (p. 32)

Date picker

The following actions open the date picker:

- Clicking on the date on the upper left side of the*Day*, *Work week* or *Week* calendar view.
- Clicking on the date on the upper left side of the scheduling view.
- Clicking on a date input field when creating or editing an appointment.

content

- **Browse** icons‹ ›. Depending on the time range selected, you can browse by month or year by clicking on the icons.
- Header. Displays the current month.
- Calendar weeks and the days of the month. If clicking on a day, the date picker closes. The selected date will be used.
- If clicking on the name of the month in the header, the months of the current year are displayed. If clicking on the year in the header, it is displayed within a list of previous and following years.

Also see

Day, *Work week*, *Week* or *Month* calendar view. (p. 111)
View for creating or editing (p. 116)
Creating new appointments (p. 122)
Editing appointments (p. 129)
Keys and key combinations (p. 32)

Pop-up
If clicking on an appointment in a calendar view, a pop-up opens. It shows the appointment's data.

content

- Buttons **Edit**, **Change status**, **Follow-up**, **Delete**.
  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 cannot change or delete the appointment. If you are the organiser, you cannot change your status.
- If clicking the **Actions** icon ≡ a menu with additional functions opens.

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

Also see

Day, *Work week*, *Week* or *Month* calendar view. (p. 111)
Changing the appointment status (p. 130)

Instructions for the buttons and icons

Editing appointments (p. 129)
Changing the appointment status (p. 130)
Creating a follow-up appointment (p. 126)
Deleting appointments (p. 133)

Instructions for the functions in the **Actions** menu ≡

Printing appointments (p. 132)
Moving appointments to another folder (p. 132)
Editing multiple appointments at once (p. 133)

List
Displays a list of appointments in the currently selected folder.

content

- Each day with appointments shows a header with the date.
- The following details are displayed for each appointment: date, time, colour, private appointment icon, subject and location.
- The text above the list contains the name of the selected folder. The number corresponds to the number of objects in the selected folder.

Functions

- If clicking on a header, the first appointment of this time range is displayed.
- If clicking on an appointment, its data is displayed in the detail view.
- To select several appointments, enable the **Check boxes** check box in the **View** drop-down in the tool bar.
  You can also use your system's multi-selection functions.
  In order to select all appointments in the currently selected folder, enable the **Select all** checkbox above the list.
- If clicking the **Sort** icon ↓↑ above the list, a menu opens that allows sorting appointments.

Also see

Searching for Appointments (p. 134)
Editing multiple appointments at once (p. 133)
Keys and key combinations (p. 32)

Detail view

If clicking on an appointment in the list, the detail view shows the appointment's data.

content

- Buttons with editing functions
- Subject
- Date, time, time zone
- The recurrence type (for recurring appointments)
- 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 displays information about the contact.
    - The person's contact data.
    - If you exchanged E-Mail messages with this person, they are displayed below *Recent conversations*.
    - If you have appointments scheduled with this person, they are displayed below *Shared appointments*.
    - Information about this person from social networks. You can use the available buttons to open this person's profile.

  If clicking on an appointment or an E-Mail, an additional pop-up opens.
- Depending on the groupware configuration, a coloured dot next to the name indicates the Messenger status of the participant.
- If the appointment has other participants, the following buttons are displayed: **Send E-Mail to all participants** [136], **Invite to new appointment** [136], **Save as distribution list** [136]
- Names of existing resources. If clicking on a resource a *pop-up* opens.
- If the appointment includes external participants, their names are displayed below *External participants*.
- If clicking on **Details**, addiitional information is displayed:
    - the appointment's organiser
    - availability
    - which folder
    - who created the appointment and when
    - who was the last person to modify the appointment

Also see

Editing appointments (p. 129)
Changing the appointment status (p. 130)
Deleting appointments (p. 133)
Printing appointments (p. 132)
Moving appointments to another folder (p. 132)
Editing multiple appointments at once (p. 133)
Keys and key combinations (p. 32)

Scheduling view

The following options are available for opening the scheduling view:

- In the tool bar: Click on **Scheduling**
- On the create or edit appointments page: Click on **Find a free time**

content

- An input field for participants and resources.
- Icons < > to browse by the week.
- Start and end date of the selected time range and the calendar week. If clicking on it, the date picker opens that allows setting a different time range.
- **Options** button. If clicking on it, a menu with several functions opens:
  - Adjust the zoom ratio for the calendar sheet view
  - Adjust the line height for displaying the participants and resources
  - Set the appointment types to be displayed
  - Hide times that are outside the working hours.
- A list of participants. The following information are shown for each participant: Name, **Remove** icon appointments
- The calendar sheet of the selected time range.
- Scroll bar. The scroll bar allows setting the part of the time range to be displayed.
- **Save as distribution list** button. Saves the added participants in a new distribution list.

Also see

Date picker (p. 112)
Scheduling appointments with several participants (p. 125)
Creating new appointments (p. 122)
Editing appointments (p. 129)
Keys and key combinations (p. 32)

View for creating or editing
This view is used when creating a new appointment or editing an existing one.

content

- Depending on the groupware configuration, elements that can be either at the top or at the bottom of the screen.
  - **Create** button. If clicking on this button, the current appointment data are saved and the editing page is closed.
  - **Discard** button. In order to cancel the creation or editing, click on this button.
  - The button next to **Calendar** shows the calendar folder in which the appointment will be created. To create the appointment in another calendar folder, click on this button.
- **Subject** input field. Enter the subject in this field. The subject is displayed as appointment title in the views.
- **Location** button. Here, you can enter the location where the appointment is to take place.
- **Starts on** and **Ends on** input fields. Set the start and end date of the appointment. Clicking on it opens the date picker.
  If the **All day** checkbox is disabled, you can set start and end times.
  If clicking on the timezone button next to the time, the time is displayed in different time zones. You can set frequently used time zones as favourites in the calendar settings.
- **All day** checkbox. Enable this checkbox if the appointment is to last the whole day.
- **Find a free time** button. Opens the scheduling view. In this view, you can find a free time when scheduling an appointment with several participants.
- **Repeat** checkbox. Enable this checkbox if the appointment is to be repeated. Additional control elements for setting the recurring parameters are displayed. Examples can be found in the questions about appointments and tasks.
- **Description** input field. You can enter a description for the appointment in this field.
- **Reminder** drop-down menu. Defines when to be reminded of the appointment by an entry in the info area.
- **Shown as** drop-down menu. Defines your availability during the appointment duration. If there are overlapping appointments, you will get a conflict message, unless the availability is set to **Free**. Examples can be found in the Calendar questions and answers.
- When having selected **Custom colours** in the **View** menu in the tool bar, a colour selection field is displayed. Clicking on a colour field defines the appointment's colour. If clicking on the first colour field, the appointment gets the colour of its calendar.
- **Private** checkbox. Enable this checkbox if other users are not to see the appointment's subject and description.
- **Add participant/resource** input field. Enter the names of the participants that are to take part in the appointment in this field. If participants are to get an additional invitation E-Mail for the appointment, enable **Notify all participants by e-mail**.
- **Add attachments** button below **Attachments**. Click on this button to attach one or several files to the contact data.

Also see

Date picker (p. 112)
Creating new appointments (p. 122)
Editing appointments (p. 129)
Keys and key combinations (p. 32)

7.2 Viewing Appointments

You can choose between the following views:

- the calendar views of a calendar's appointments
  In the calendar views *Day*, *Work week*, and *Week*, you can display the day times in multiple time zones.
- the list view of a calendar's appointments

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.
   In order to view all your appointments from all calendar folders, open the **All my appointments** folder.
3. Click on an appointment in the calendar sheet. The calendar's data is displayed in the pop-up.
4. In order to browse the calendar, use the navigation bar on top of the calendar sheet.
   In order to display the time frame with the current day, click on **Today** in the tool bar.
   Information on displaying appointments can be found in How are appointments displayed? (p. 118)

Also see

Searching for Appointments (p. 134)
Displaying appointments in the list view (p. 118)
Displaying multiple timezones (p. 117)
Viewing or Saving Appointment Attachments (p. 120)

7.2.2 Displaying multiple timezones

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

How to display multiple timezones in a calendar view:

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

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

Also see

Displaying appointments in the calendar view (p. 117)

7.2.3 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.
   In order to view all your appointments from all calendar folders, open the **All my appointments** folder.
3. Click on an appointment in the list. The appointment's data is displayed in the detail view.
   You can open the appointment in a separate window by double-clicking on the contact in the list.
4. To display another appointment, use one of the following methods:
   - Click on another appointment in the list.
   - Use the cursor keys to browse the list.

Also see

Searching for Appointments (p. 134)
Displaying appointments in the calendar view (p. 117)
Viewing or Saving Appointment Attachments (p. 120)
Displaying multiple timezones (p. 117)

7.2.4 How are appointments displayed?

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

- The colour scheme set: classic colours, dark colours, custom colours
- Your availability displayed during the appointment duration: Booked, Tentative, Absent or Free
- Your appointment confirmation status: Accepted, Tentative, Declined
- Visibility of the appointment's subject and description: Private or visible for other users

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

Display for the colour schemes Classic colours or Dark colours

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

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

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

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

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

Also see

Display for the colour scheme Custom colour (p. 119)
Displaying appointments in the calendar view (p. 117)

Display for the colour scheme Custom colour

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

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

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

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

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

Also see

Display for the colour schemes Classic colours or Dark colours (p. 119)
Displaying appointments in the calendar view (p. 117)

7.3 Viewing or Saving Appointment Attachments

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

- display a preview of the attachment
- open the attachment in the browser
- download the attachment
- save the attachment to *Drive* [159]

Note: Depending on the attachment's file format, the available function 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
- Scheduling appointments with several participants
- Creating a follow-up appointment
- Creating appointments from iCal attachments
- Importing appointments from files
- Subscribing to appointments from other calendars
- Resolving appointment conflicts

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, 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. If selecting a shared calendar folder, you are asked where to create the appointment:

   If you create the appointment on behalf of the owner, the appointment is created in the owner's shared calendar folder.

   If you invite the owner to the appointment though, the appointment is saved in your calendar folder.

2. Click on **New** in the tool bar.
3. Enter a subject. If required, enter the location and a description.

   If you want to create the appointment in another calendar folder, click on the folder name next to **Calendar** at the top. Select a calendar folder.

4. Define the appointment's start and end by using the date picker. For all day appointments, activate **All day**.

   In order to display the time in different timezones, click on the timezone button next to the time. You can set frequently used timezones as favourites in the calendar settings.

5. To get an appointment reminder, select a setting in **Reminder**.
6. You can use additional functions: create recurrence, add other participants or resources, set the availability, assign colours, 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. In the calendar sheet double-click on a free area or drag open an area ranging from the beginning to the end of the new appointment.

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

Also see

How to use the date picker on the *Create appointment* page: (p. 123)
How to use additional functions on the *Create appointment* page: (p. 124)
How to use the scheduling view for creating appointments: (p. 125)
Resolving appointment conflicts (p. 127)
Creating a follow-up appointment (p. 126)
Creating appointments from iCal attachments (p. 126)
Importing appointments from files (p. 126)
Subscribing to appointments from other calendars (p. 126)
View for creating or editing (p. 116)

How to use the date picker on the *Create appointment* page:

1. Click on the date field below **Starts on** or **Ends on**. The date picker opens.
2. To select a date within the current month, click on the wanted day. To select today's date, you can also click on **Today**.

   The date picker will close. The date is entered into the date field.
3. To select a date from another month, the following options are available.
   - To browse by month, use the **Browse** icons < >.
   - To navigate to a specific month of the current year, click on the name of the month in the header. The current year's months are displayed.
     To browse by year, use the **Browse** icons < >.
     Click on the wanted month.
   - To navigate to a specific month of another year, click on the name of the month in the header. The current year's months are displayed.
     Click on the year. A list of years is displayed.
     To browse this overview, use the **Browse** icons < >.
     Click on the wanted year. Click on the wanted month.

   Click on the wanted day. The date picker will close. The date is entered into the date field.

Also see

How to create a new appointment: (p. 122)
How to use the scheduling view for creating appointments: (p. 125)
Resolving appointment conflicts (p. 127)
Managing Groups (p. 138)
Managing Resources (p. 139)
Creating distribution lists (p. 98)
Date picker (p. 112)

How to use additional functions on the *Create appointment* page:

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 × . In order to show them again, click on the sentence next to **Repeat**.
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. In order to set a specific colour for the appointment, click on a colour field. If you do not select a colour or click on the first colour field, the appointment is displayed in the colour of the calendar folder. A calendar folder's default colour is light blue.

   Note: The colour selection drop down is only displayed if **Custom colours** is enabled in the **View** menu in the tool bar.
5. To add other participants or resources, enter the participants' E-Mail addresses, a group's name, a distribution list's name or the resource's name in the input field below *Participants*.

   Tip: While entering the recipients, 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 inform all participants about the new appointment, enable *Notify all participants by e-mail.*.

   Tip: To find free appointment times of all participants and resources you can use the schedule view.
6. To add attachments to the appointment, click on **Add attachments** 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 a file browser or from the desktop to the appointments window.

Also see

How to create a new appointment: (p. 122)
How to use the scheduling view for creating appointments: (p. 125)
Resolving appointment conflicts (p. 127)
Managing Groups (p. 138)
Managing Resources (p. 139)
Creating distribution lists (p. 98)

7.4.2 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.

How to use the scheduling view for creating appointments:

1. You have the following possibilities for opening the scheduling view:
   - Click on **Scheduling** in the tool bar. The *Scheduling* page opens.
   - On the create or edit appointments page click on **Find a free time**. The *Scheduling* window opens.
2. Enter a participant's or resource's name in *Add participant/resource*. The appointments of the participant or resource are displayed in the calendar sheet.

   You can save the participants as a distribution list. To do so, select **Save as distribution list** below the list.
3. Search for a free time in the calendar. Use the following methods:
   - To set a time range, click on the date on the upper left side. You can also use the browse icons
   - Use the **Options** menu to adjust the view in the calendar sheet.
   - To adjust the visible part of the time range, use the scroll bar below the calendar sheet.
4. Define the appointment's start and end by using one of the following options:
   - In the calendar sheet drag open an area ranging from the beginning to the end of the new appointment.
   - To set the appointment's duration to one hour, click on the wanted time.

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

Also see

How to create a new appointment: (p. 122)
How to use additional functions on the *Create appointment* page: (p. 124)
Resolving appointment conflicts (p. 127)
Creating a follow-up appointment (p. 126)
Creating appointments from iCal attachments (p. 126)
Importing appointments from files (p. 126)
Subscribing to appointments from other calendars (p. 126)
Scheduling view (p. 115)
Date picker (p. 112)

7.4.3 Creating a follow-up appointment

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

How to create a follow-up appointment:

1. Click on an appointment in a calendar view. In the pop-up, click on **Follow-up**.
2. Adjust the data for the new appointment. Click on **Create**.

Also see

Creating new appointments (p. 122)
Resolving appointment conflicts (p. 127)
Creating appointments from iCal attachments (p. 126)
Importing appointments from files (p. 126)
Subscribing to appointments from other calendars (p. 126)

7.4.4 Creating appointments from iCal attachments

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

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

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

Also see

Creating new appointments (p. 122)
Resolving appointment conflicts (p. 127)
Importing appointments from files (p. 126)
Subscribing to appointments from other calendars (p. 126)

7.4.5 Importing appointments from files

Information on importing appointments from files can be found in Importing Data (page 210).

7.4.6 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 206).

7.4.7 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**.

Also see

Creating new appointments (p. 122)

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 **Accept**, **Tentative** or **Decline**.

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

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

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

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

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 190).

The following options are available:

- Editing appointments
- Editing appointments with drag and drop
- Changing the appointment status
- Managing favourite timezones
- Using calendar colours
- 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**.

Also see

View for creating or editing (p. 116)

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.

Also see

How to change an appointment's time: (p. 130)
How to change the start or end of an appointment: (p. 130)
How to move an appointment to another folder: (p. 132)

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.

Also see

How to move an appointment to another day: (p. 129)
How to change the start or end of an appointment: (p. 130)
How to move an appointment to another folder: (p. 132)

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.

Also see

How to move an appointment to another day: (p. 129)
How to change an appointment's time: (p. 130)
How to move an appointment to another folder: (p. 132)

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 to 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 Managing favourite timezones

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

How to mark a timezone as favourite:

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

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

Also see

Displaying multiple timezones (p. 117)

7.6.5 Using calendar colours

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

How to select a calendar colour:

If no checkboxes are displayed next to your personal calendar folders, click on **View** in the tool bar. Select **Custom colours**.

Click the **Folder-specific actions** icon next to the folder name. Select a colour from the colour selection drop down.

Also see

How are appointments displayed? (p. 118)

7.6.6 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 **Actions** icon ≡ . Select **Move** from the menu.

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

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

Also see

How to move an appointment to another day: (p. 129)
How to change an appointment's time: (p. 130)
How to change the start or end of an appointment: (p. 130)

7.6.7 Printing appointments

To print calendars and appointments you can:

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

How to print a calendar sheet with appointments:

1. Click on **View** in the tool bar. Select one of the following entries: **Day**, **Work week**, **Week** or **Month**.
2. Open a calendar folder in the folder tree.

   In order to view all your appointments from all calendar folders, open the **All my appointments** folder.
3. Click on **View** in the tool bar. Click on **Print** in the menu. A window with a print preview opens.
4. If required, change the printer settings. Click on the **Print** button.
5. Close the print preview window.

How to print an appointment's data:

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

   Click on an appointment in a calendar view. In the pop-up, click the **Actions** icon ≡ . Click on **Print** in the menu.

   Select an appointment in the list view. Click the **Actions** icon ≡ in the tool bar. Click on **Print** in the menu.

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

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

How to print a list of appointments:

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

7.6.8 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.

7.6.9 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, participants
- Search terms for a time range. Searches for appointments that take place within a specific time range. You define a valid time range with the following details.
    - The key words *today*, *yesterday*, *last week*, *last month*, *last year*
    - The key words for those time intervals: *last 7 days*, *last 30 days*, *last 365 days*
    - A day of the week, e.g. *Monday*
    - A specific month, e.g. *July*
    - A four digit date, e.g. *2015*
    - A date, e.g. *1/31/2015*
    - A date range, e.g. *12/1/2014 - 1/31/2015*
- Folders that are to be searched
- appointment confirmation status
- Type: all, series, single appointment
- Folder type: all, private, public, shared

How to search for appointments:

1. Click the **Start search** icon or in the input field in the search bar. The folder button indicates the folders to be searched. The **Options** drop-down offers functions for limiting the search.

2. To select a folder for the search, click on the folder button.
   - If you select **All folders**, all private, public, and shared folders and subfolders are searched.
   - If you select a specific folder or the folder, only this folder is searched, but no subfolders.
3. Enter a search term in the input field. The search menu opens.

   Define the data sources to be searched by clicking on an entry in the search menu.
   - If clicking on the search term or pressing enter, the following data sources are searched: subject, description
   - In order to search for appointments within a specific time frame, use a valid time range as search term. As soon as a valid time range is recognized in your input, the time range is displayed in the search menu. Click on the time frame.
   - In order to only search in the subject, click on **in subject** in the search menu. Accordingly, you can limit the search to the description, location or the attachment's name.
   - In order to search for appointments with a specific participant, click on a name in the search menu.

   Result:

   The search results are displayed in the list that is shown in the display area.
4. You have the following options for adjusting the search results:
   - To refine the search result, enter additional search terms: To remove a search term, click the icon next to the search term.
   - To search in another folder, click on the folder button. Select a folder.
   - To limit the search to private, public or shared folders, click on **Options**. Select a folder type.
   - To limit the search to appointments with a specific confirmation status, click on **Options**. Select a status.
   - To limit the search to single or recurring appointments, click on **Options**. Select a type.
5. In order to finish the search, click the **Cancel search** icon.

7.8 Appointments in teams

The following options are available:

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

7.8.1 Sharing appointments

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

- To make a calendar available for internal users or external partners, proceed as follows:
  Create a new personal or public calendar folder.
  Share this folder.
  You can also share an existing folder.
- If another internal user shared a calendar folder with you, you can access this folder in the folder tree.
- To invite external partners to an appointment, proceed as follows:
  When creating the appointment, add external partners by entering their E-Mail addresses in the input field below *Participants*.
  Make sure the *Notify all participants by E-Mail* option is enabled.
  The external partners receive an E-Mail with an appointment invitation in iCal format.

7.8.2 Sending an E-mail to participants

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

How to send an Email to all appointment participants:

1. Depending on the view selected, use one of the following methods:
   Click on an appointment in a calendar view. Click on **Send e-mail to all participants** in the pop-up.
   Select an appointment in the list view. Click on **Send e-mail to all participants** in the display area.
2. Fill in the details in order to Send a new E-Mail [58].

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. Depending on the view selected, use one of the following methods:
   Click on an appointment in a calendar view. Click on **Invite to appointment** in the display area.
   Select an appointment in the list view. Click on **Invite to appointment** in the display area.
2. Complete the data for Creating an appointment [122].

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. 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 **Save as distribution list**.
   Select an appointment in the list view. Click on **Save as distribution list** in the display area.
2. Complete the details for creating the distribution list [98].

7.9 Managing Groups

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

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

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

How to create a new group:

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

How to edit a group:

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

How to delete a group:

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

7.10 Managing Resources

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

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

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

How to create a new resource:

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

How to edit a resource:

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

How to delete a resource:

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

7.11 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.
3. Change the settings [140].

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
- Receive notification for appointment changes
- Receive notification as appointment creator when participants accept or decline
- Receive notification as appointment participant when other participants accept or decline
- Automatically delete the invitation e-mail after the appointment has been accepted or declined

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.

Receive notification for appointment changes
Specifies whether you will receive an email notification, if the following is true: An appointment in which you participate has been re-created, changed or deleted.

Receive notification as appointment creator when participants accept or decline
Specifies whether you will receive an email notification, if the following is true: a participant accepted or declined an appointment created by you.

Receive notification as appointment participant when other participants accept or decline
Specifies whether you will receive an email notification, if the following is true: a participant accepted or declined an appointment in which you participate.

Automatically delete the invitation e-mail after the appointment has been accepted or declined
Defines whether the email notification for an appointment invitation will be automatically deleted when accepting or declining the appointment.

8 Tasks

Learn how to work with the *Tasks* application.

- The *Tasks* Components
- view tasks
- view or save appointment attachments
- 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

The *Tasks* app includes the following components.

- Search bar
- Folder tree
- Tool bar
- Display area
  - List
  - Detail view
- View for creating or editing

Search bar
Enables you to search for tasks.

Folder tree
Displays the tasks folders.

content

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

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

Functions

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

Also see

Folders (p. 190)
Navigating within the folder structure (p. 190)
Creating folders (p. 192)
Renaming folders (p. 192)
Moving folders (p. 192)
Deleting folders (p. 192)
Keys and key combinations (p. 32)

Tool bar
Contains the following:

- **New**. Creates a new task.
- **Edit**. Edits a task's data.
- **Due**. Changes a task's due date.
- **Done**. Marks a task as done.
- **Delete**. Deletes the tasks selected by you.
- **Actions** icon . Opens a menu with additional functions:
- **View**. Opens a menu with check boxes for controlling the view.
  - **Folder view**. Opens or closes the folder tree.
  - **Check boxes**. Displays check boxes for marking objects, in the list.

Also see

Instructions for the buttons and icons

Creating Tasks (p. 149)
Editing tasks (p. 152)
Changing a task's due date (p. 153)
Marking tasks as done (p. 152)
Deleting tasks (p. 154)
Keys and key combinations (p. 32)

Instructions for the functions in the **Actions** menu

Printing tasks (p. 153)
Moving tasks (p. 153)
Editing multiple tasks at once (p. 154)

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

List
Displays a list of tasks in the folder selected.

content

- The following details are displayed for each task: subject, status or due date, and the progress.
- The text above the list contains the name of the selected folder. The number corresponds to the number of objects in the selected folder.

Functions

- If clicking on a task, its content is displayed in the detail view.
- To select several tasks, enable the **Check boxes** check box in the **View** drop-down in the tool bar. You can also use your system's multi-selection functions.
  In order to select all contacts in the currently selected folder, enable the **Select all** checkbox above the list.
- If clicking the **Sort** icon↓↑ above the list, a menu opens that allows sorting tasks. You can also define in this menu whether tasks marked done are displayed.

Also see

Searching for Tasks (p. 155)
Editing multiple tasks at once (p. 154)
Keys and key combinations (p. 32)

Detail view
Shows the data of the task that you selected in the list.

content

- Subject
  A priority icon next to the subject, if available
  Private tasks are marked with the **Private** icon .
- Task's start date, if available
- Status and progress
- If the task has attachments, the names of the attachments are displayed.
- Task's description, if available
- If the task is a recurring task, recurrence parameters will be displayed.
- Task's start date, if available
- Task details like billing information, if available
- If the task has several participants, the number of participants that accepted, declined or have not replied yet are shown on the top right side above the list of participants. In order to filter the list of participants, click the icons.
- Names of the participants, if they exist. If clicking on a name, a *pop-up* opens. It displays information about the contact.
  - The person's contact data.
  - If you exchanged E-Mail messages with this person, they are displayed below *Recent conversations*.
  - If you have appointments scheduled with this person, they are displayed below *Shared appointments*.
  - Information about this person from social networks. You can use the available buttons to open this person's profile.

  If clicking on an appointment or an E-Mail, an additional pop-up opens.
- Depending on the groupware configuration, a coloured dot next to the name indicates the Messenger status of the participant.
- If the appointment includes external participants, their names are displayed below *External participants*.

View for creating or editing
This view is used when creating a new task or editing an existing one.

content

- Depending on the groupware configuration, elements that can be either at the top or at the bottom of the screen.
  - **Create** button. If clicking on this button, the current task data is saved and the editing page is closed.
  - **Discard** button. In order to cancel the creation or editing, click on this button.
- **Subject** input field. Enter the subject in this field. The subject is displayed as task title in the views.
- **Description** input field. You can enter a description for the task in this field.
- **Expand form** button. Displays additional input fields.
  - **Start date** and **Due date** input fields. Defines the start and the due date. If clicking on it, a dialogue for selecting the date opens.
    If the **All day** checkbox is disabled, you can set start and due times.
  - **All day** checkbox. Enable this checkbox if the task is to last the entire days.
  - **Repeat** checkbox. Enable this checkbox if the task is to be repeated. Additional control elements for setting the recurring parameters are displayed. Examples can be found in the questions about appointments and tasks.
  - **Reminder** drop-down menu. Defines when to be reminded of the task's due date by an entry in the info area. You can also set a date and time for the reminder in **Reminder date**. In this case, **Manual input** will be pre-selected in the **Reminder** field.
  - **Status** drop-down menu. Defines the task's status. You can also enter a percentage value for the task completion in **Progress**.
  - **Priority** drop-down menu. Defines the task's importance.
  - **Private** checkbox. Enable this checkbox if other users are not to see the task's subject and description.
  - **Add participant/resource** input field. Enter the names of the participants that are to take part in the task in this field.
  - **Add attachments** button below **Attachments**. Click on this button to attach one or several files to the contact data.
  - **Show details** button. If clicking on it, additional data fields are displayed where you can enter billing details like estimated costs, actual costs or billing information.

Also see

Creating Tasks (p. 149)
Editing tasks (p. 152)
Keys and key combinations (p. 32)

8.2 Viewing Tasks

How to display a task:

1. Open a tasks folder in the folder tree.
2. To sort the tasks list, click the **Sort** icon above the list. Select a sort criterion from the menu.
   To only display due tasks in the list, click the **Sort** icon above the list. Disable **Show done tasks** in the menu.
3. Click on a task in the list. The task's data is displayed in the detail view.
   You can open the task in a separate window by double-clicking on the contact in the list.
4. To display another task, use one of the following methods:
   - Click on another task in the list.
   - Use the cursor keys to browse the list.

Also see

Searching for Tasks (p. 155)
Viewing or Saving Appointment Attachments (p. 148)

8.3 Viewing or Saving Appointment Attachments

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

- display a preview of the attachment
- open the attachment in the browser
- download the attachment
- save the attachment to *Drive* [159]

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

How to use the task attachment functions:

1. Select a task with an attachment.
2. Click on an attachment's name in the detail view. 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**. The following optional functions are available.

   - Set the task's start and due date.
   - To get an appointment reminder, select a setting in **Reminder**. The respective date and time are entered in **Reminder date**.
     To use custom values, set them in **Reminder date**. In this case, **Manual input** will be pre-selected in the **Reminder** field.
   - You can use additional functions: Creating recurring tasks, adding participants or groups, adding attachments, adding details.
4. Click on **Create**.

Also see

How to use additional functions on the *Create task* page: (p. 150)
View for creating or editing (p. 146)

How to use additional functions on the *Create task* page:

1. To view the complete form, click on **Expand form**.

   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 × . In order to show them again, click on the sentence next to **Repeat**.
2. To add other participants, enter the participants' E-Mail addresses, a group's name or a distribution list's name in the input field below *Participants*.

   Tip: While entering the recipients, matching suggestions are displayed. To accept a suggestion, use one of the following methods:

   - Use the scrollbar to browse the list. Click on a suggestion.
   - Use the cursor keys to select a suggestion. Press Enter.

   In order to remove a participant, click the icon next to the name.
3. In order to add attachments to the task, click on **Add attachments**. Select one or multiple files.

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

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

Also see

How to create a new task: (p. 150)
Managing Groups (p. 138)
Creating distribution lists (p. 98)

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 **Accept**, **Tentative** or **Decline**.

Tip: You can confirm the task directly in the notification area by clicking on the **Accept invitation** button.

How to answer a task invitation in an email invitation:

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

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 190).

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.
   A description of the input fields can be found in View for creating or editing (page 146).
4. Click on **Save**.

Also see

How to mark a task as done: (p. 152)
How to change a task's due date: (p. 153)
How to change your task confirmation: (p. 153)
View for creating or editing (p. 146)

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. Click on **Done** in the tool bar.
   The button label changes to **Undone**. Clicking on it marks the task as not done.

Also see

How to edit a task: (p. 152)
How to change a task's due date: (p. 153)
How to change your task confirmation: (p. 153)

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 **Due** in the tool bar. Select an entry.

Also see

How to edit a task: (p. 152)
How to mark a task as done: (p. 152)
How to change your task confirmation: (p. 153)

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 **Actions** 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 **Actions** icon≡ in the tool bar. Click on **Change confirmation status** in the menu.
3. A window opens. Select a confirmation status. If required, enter a message.
4. Click on **Change status**.

Also see

How to edit a task: (p. 152)
How to change a task's due date: (p. 153)
How to mark a task as done: (p. 152)

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 **Actions** icon ≡ in the tool bar. Click on **Print** in the menu. A window with a print preview opens.
3. If required, change the printer settings. Click on the **Print** button.
4. Close the print preview window.

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, participants
- Folders that are to be searched
- the task's status
- Task type: single or recurring task
- Folder type: all, private, public, shared

How to search for tasks:

1. Click the **Start search** icon or in the input field in the search bar. The folder button indicates the folders to be searched. The **Options** drop-down offers functions for limiting the search.

2. To select a folder for the search, click on the folder button.
   - If you select **All folders**, all private, public, and shared folders and subfolders are searched.
   - If you select a specific folder or the folder, only this folder is searched, but no subfolders.

3. Enter a search term in the input field. The search menu opens.

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

   Result:

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

4. You have the following options for adjusting the search results:
   - To refine the search result, enter further search terms: To remove a search term, click the icon next to the search term.
   - To search in another folder, click on the folder button. Select a folder.
   - To limit the search to private, public or shared folders, click on **Options**. Select a folder type.
   - To limit the search to tasks with a specific editing status, click on **Options**. Select a status.
   - To limit the search to single or recurring tasks, click on **Options**. Select a type.

5. In order to finish the search, click the **Cancel search** icon.

8.8 Tasks in teams

The following options are available:

- Sharing [156] tasks with other users
- Delegating [156] 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 make a folder available for internal users or external partners, proceed as follows:
  Create a new personal or public tasks folder.
  Share this folder.
  You can also share an existing folder.
- If another internal user shared a task folder with you, you can access this folder in the folder tree.
- 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 Interchanging Tasks with Other Applications

The following options are available:

- export [215] tasks to use them in other applications
- import [210] 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. Click on **Tasks** in the side bar.
3. Change the settings [158].

The following settings are available.

- Receive notifications when a task in which you participate is created, modified or deleted
- Receive notifications when a participant accepted or declined a task created by you
- Receive notifications when a participant accepted or declined a task in which you participate

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

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

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

9 Drive

Learn how to work with the *Drive* application.

- The *Drive* Components
- view files and folders
- create files or folders
- organise files
- search for files
- Share files and folders with other users or external partners.
- access data with WebDAV
- access your cloud storage that you set up in third party products like Dropbox
- work in teams with other users or external partners
- use the *Drive* settings

Information on the usage of local apps on desktops and mobile devices can be found in the Drive apps user guide.

How to launch the *Drive* app:

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

9.1 The *Drive* Components

The *Drive* app includes the following components.

- Search bar
- Folder tree
- Tool bar
- Navigation bar
- Display area
- Viewer

Search bar
Enables you to search for files.

Folder tree
Displays the folders.

content

- *My files*. Contains your personal files and folders. By default, it contains folders for documents, music, images, and videos.
- *My attachments*. Displays the file attachments of E-Mail messages sent or received by you.
- *My shared E-Mail attachments*. Contains the file attachments sent by you as a link.
- *My shares*. Shows the files and folders shared by you for other users or external partners.
- *Trash*. Contains the files deleted by you.
- *Shared files*. Contains files shared with you by other users.
- *Public files*. Contains files shared with all users.
- The **Add storage account** button below the folders offers functions for adding cloud storage accounts that you set up in third party products like Dropbox.

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

Functions

- If clicking on a folder, its contents are displayed.
- The **Folder-specific actions** icon next to the selected folder offers functions for organising data and for exchanging data.

Also see

Folders (p. 190)
Sharing (p. 196)
Navigating within the folder structure (p. 190)
Creating folders (p. 192)
Renaming folders (p. 192)
Moving folders (p. 192)
Deleting folders (p. 192)
Keys and key combinations (p. 32)

Tool bar
Contains the following elements. **Note:** Some buttons are only displayed, if objects have been selected.

- **New**. Contains the following functions:
  - **Add local file**. Adds one or multiple local files.
  - **Add and encrypt local file**. Adds and encrypts a local file. This function is only available if you have access to Guard.
  - **Add note**. Creates a simple text file.
  - **New text document**. Creates a new text document.
  - **New spreadsheet** Creates a new spreadsheet.
  - **Add new folder**. Creates a new folder.
- **Share** icon . This function allows sharing files or folders.
- **Viewer** icon . Shows the contents of the folder's files in the viewer.
- **Present** icon . Starts a presentation. This function is only available if you select a document in the PowerPoint or PDF format.
- **Download** icon . Downloads the files selected by you. Multiple files are downloaded as a zip archive.
- **Delete** icon . Deletes the files or folders selected by you.
- **Actions** icon . Opens a menu with additional functions:
  Note: If you selected multiple files, some functions are not available.
- **View**. Allows selecting the view in the display area.

Also see

Instructions for the buttons and icons

Creating Files or Folders (p. 170)
Displaying a file's content (p. 167)
Holding a presentation (p. 168)
Downloading files or folder contents (p. 169)
Deleting files (p. 174)
Keys and key combinations (p. 32)

Instructions for the functions in the **Actions** menu

Sending files as Email attachments (p. 171)
Sending files as a link (p. 171)
Showing the link to a file (p. 172)
Adding files to the portal (p. 173)
Moving files or folders (p. 173)
Copying files (p. 173)
Locking or unlocking files (p. 175)

Navigation bar
The navigation path is located below the tool bar.

Functions

- Navigation path. It shows the path to the opened folder. To open a parent folder, click on a path entry.
- **Select** button. Contains functions for selecting or filtering objects in the display area:
  - select all files and folders, select all files, clear the selection
  - display certain file types only, display all file types
- **Sort by** button. Sorts the files in the display area by various criteria.

Also see

Viewing Files and Folders (p. 166)

Display area
Displays the files and folders as a list, icons or tiles. In order to select a view, click on the **View** button in the tool bar. The views are differentiated as follows:

- For each file and folder a row with the following content is displayed in the **List** view.
  - An icon. There are different icons for the single object types.
  - The name of the file or folder.
  - Date or time of the last change
  - In the case of files, the size is displayed.
- For each file and folder the following information is displayed in the **Icons** view.
  - An icon. If available, a file preview is shown.
  - The name of the file or folder.
- Files and folders are displayed as squares in the **Tiles** view.

Functions

- In order to display details of a selected object, click on **View** in the tool bar. Enable **File Details**. Details are displayed in a side bar.
- In order to display specific object types only, click on **Select** in the navigation bar. Enable an entry below *Filter*.
  In order to display all objects, click on **Select** in the navigation bar. Enable the entry **None** below *Filter*.
- In order to sort objects, click on **Sort by** in the navigation bar. Enable an entry.
- Select a file or folder by clicking on it. You can also use your system's multi-selection functions.
  You can also use checkboxes to select files or folders. In order to display the checkboxes, click on the **View** button in the tool bar. Enable **Checkboxes**.
  To select all objects or files or to clear the selection, click on **Select** in the navigation bar. Click on an entry below *Select*.
- If double-clicking on a folder, it will be opened.
- If double-clicking on a file, it will be opened in the viewer.

Also see

Viewing Files and Folders (p. 166)
How to download files: (p. 169)
Managing Files (p. 171)
Sharing (p. 196)
Keys and key combinations (p. 32)

Details
Displays information about the selected object in a side bar. If no side bar is displayed, click on **View** in the tool bar. Enable **File Details**.

content

- *Details*. Shows general information: the name of the file or folder, the file size, the date of the last change, the editor's name, folder, link
  If you shared the object, the button next to *Shares* can be used to open the dialogue window for editing shares.
  When having selected an object in the *My attachments* folder, the **View message** button is displayed. If clicked on, the respective E-Mail with the attachment is displayed.
- *Description*. Shows file comments, if available.
  In order to add a description, click on **Add a description**. In order to edit a description, double-click on the description.
- **Upload a new version** button. Click on this button to select a file that is uploaded as new version.
- If there are several file versions, the *Versions* area is displayed. For each version the following information is displayed:
  - The version's file name. If clicking on it, a menu with several functions opens:
  - The version's file size
  - name of the user who uploaded the version
  - date and time of the version's upload

Also see

Viewing Files and Folders (p. 166)
How to download files: (p. 169)
Managing Files (p. 171)
Sharing (p. 196)
Keys and key combinations (p. 32)

Viewer
Shows the contents of files. In order to launch the viewer, do one of the following:

- Double-click on a file in the display area
- Select a file. Click the **Viewer** icon in the tool bar.

content

- Name of the selected file. If clicking on the name, the *Rename* dialogue window opens.
- Depending on the selected file type, the respective functions are displayed.
  - If the selected file is editable, the **Edit** button is displayed.
  - If a document template is shown, the **New from template** button is displayed.
  - Depending on the content of the selected file, the **Zoom out** icon and the **Zoom in** icon are displayed.
  - If a presentation or a PDF document is shown, the **Present** icon is displayed.
- **Download** icon. Downloads the file.
- **Share** icon . This function allows sharing data.
- **Actions** icon . If clicking the icon, a menu with additional functions opens:
- **View details** icon . If clicking the icon, a side bar with information about the file is opened or closed. The side bar contains the same functions as the side bar in the display area.
- **Pop out** icon . Clicking on it displays the contents of the selected file on a new page. For documents in the Office format, there are page navigation functions available:
- **Close** icon . If clicking the icon, the viewer will be closed.
- A view of the file contents, if available
  If there are additional files, icons for browsing are displayed to the left and to the right of the view.

Also see

Instructions for the buttons and icons

Displaying a file's content (p. 167)
Holding a presentation (p. 168)
How to download files: (p. 169)
Deleting files (p. 174)
Working with versions (p. 176)

Instructions for the functions in the **Actions** menu

Editing file names (p. 172)
Creating or editing descriptions (p. 172)
Sending files as Email attachments (p. 171)
How to upload a new version: (p. 176)
Deleting files (p. 174)

9.2 Viewing Files and Folders

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

- display [167] a file's content
- display attachments of E-Mail messages [168] sent or received by you
- hold [168] presentations in familiar Office formats or in the PDF format
- download [169] a folder's files or contents

9.2.1 Displaying a file's content

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

How to display a file's content:

1. Open a folder containing files.
2. In order to select a view for the objects, click on **View** in the tool bar. Select one of those entries: **List**, **Icons**, **Tiles**.

   In order to display details of a selected file, click on **View** in the tool bar. Enable **File Details**. If selecting multiple files by using the checkboxes, details about the last selected file are displayed.
3. To change the sorting, click on **Sort by** in the navigation bar. Enable an entry.

   In order to display specific object types only, click on **Select** in the navigation bar. Enable an entry below *Filter*.
4. Use one of the following options to open a file in the *Viewer*:
   - Double-click on a file in the display area.
   - Select one or several files in the display area. Click the **View** icon in the tool bar.

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

   Depending on the file type, different functions can be available:
   - For text files and documents in the Office format, there are editing functions available: Information on editing documents can be found in the Documents user documentation.
   - For presentations, an icon for presenting the presentation is shown.
   - For audio and video files in suitable formats, there are playback functions available.
     Note: The playback options depend on the browser used.
5. In order to open the previous or next file, click the **Back** icon or the **Next** icon next to the view.

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

Also see

Searching for Files (p. 178)
Displaying E-Mail attachments (p. 168)
Holding a presentation (p. 168)
Downloading files or folder contents (p. 169)
Viewer (p. 165)

9.2.2 Displaying E-Mail attachments

The attachments of E-Mail messages that have been sent or received by you are displayed in a separate folder.

How to display E-Mail attachments:

1. Open the **My attachments** folder.
2. To view an attachment's content, use the methods for viewing files.

   To display the E-Mail that belongs to the selected attachment, click on **View** in the tool bar. Enable **File Details**. Click on **View message**.

Also see

Holding a presentation (p. 168)
Downloading files or folder contents (p. 169)

9.2.3 Holding a presentation

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

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

How to locally hold a presentation:

1. Open a folder containing presentations.
2. Select a presentation in the display area. Click the **Present** icon in the tool bar.

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

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

   You can use the icons on the right side of the toolbar to adjust the sheet size.
3. In order to locally start the presentation, click on **Start presentation** in the tool bar. Select **Start local presentation**.

   During the presentation, the following functions are available.

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

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

   If clicking the icon **Toggle fullscreen**, the fullscreen mode is activated You can use the [esc] key or the function bar at the bottom of the screen to leave the fullscreen mode.
4. In order to end the presentation, click on **End presentation** in the tool bar.

Also see

How to hold a remote presentation: (p. 169)
Displaying a file's content (p. 167)
Downloading files or folder contents (p. 169)

How to hold a remote presentation:

1. Open a folder containing presentations.
2. Select a presentation in the display area. Click the **Present** icon in the tool bar.

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

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

   You can use the icons on the right side of the toolbar to adjust the sheet size.
3. Send the URL of the selected presentation to the users who should take part in the presentation. The users have to open the URL in their browser.

   If clicking the **Show participants** icon the users who are remotely taking part in the presentation are shown in the side bar.
4. Click on **Start presentation** in the tool bar. Select **Start remote presentation**.

   During the presentation, the following functions are available.

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

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

   If clicking the icon **Toggle fullscreen**, the fullscreen mode is activated You can use the [esc] key or the function bar at the bottom of the screen to leave the fullscreen mode.
5. In order to end the presentation, click on **End presentation** in the tool bar.

Also see

How to locally hold a presentation: (p. 168)
Displaying a file's content (p. 167)
Downloading files or folder contents (p. 169)

9.2.4 Downloading files or folder contents

The following options are available:

- Download one or several files.
- You can download the complete content of a folder as a zip archive.

How to download files:

1. Open a folder containing files.
2. Select one or several files in the display area. Click the **Download** icon in the tool bar.

   You can also use the **Download** button in the *Viewer*.
3. Complete the steps for downloading the file.

Tip: Learn how to download a certain file version by reading Section 9.4.11, "Working with versions".

How to download the complete content of a folder:

1. Select the folder containing the content to be downloaded in the folder tree.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Download entire folder**.
3. Complete the steps for downloading the folder. The folder's content is saved as a zip archive.

9.3 Creating Files or Folders

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

How to add new files:

1. Open a folder.
   Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click on **New** in the tool bar. Click on **Add local file**.
3. Select one or several files in the *Upload file* window.
   Click on **Open**. The display area shows the current progress status.
   In order to cancel the process, click on **Cancel** at the bottom right side of the display area.
   In order to cancel the process for single files, click on **File Details** at the bottom right side of the display area. Click on **Cancel** next to a file name in the *Upload progress* window.
   In the Settings, you can define whether a new file or a new version of a possibly existing file with the same name should be created.

Tips:

- You can continue working in the groupware during the upload process.
- You can also create a new file by dragging a file from a file browser or from your desktop to the *Drive* app window and dropping it in the display area.

Also see

How to upload a new version: (p. 176)
How to create a new folder: (p. 170)

How to create a new folder:

1. Open a folder.
   Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click on **New** in the tool bar. Click on **Add new folder**.
3. Enter a name in the *Add new folder* window. Click on **Add**.

Also see

How to add new files: (p. 170)

9.4 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 Creating Files or Folders (p. 170).

The following options are available:

- Sending files as a link
- Sending files as Email attachments
- Showing the link to a file
- Editing file names
- Creating or editing descriptions
- Moving files or folders
- Copying files
- Adding files to the portal
- Deleting files
- Locking or unlocking files
- Working with versions

9.4.1 Sending files as a link

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

How to send links to files:

1. Select one or several files in the display area. Click the **Actions** icon in the tool bar. Click on **Send as internal link** in the menu.
2. In the *Compose new E-Mail* page, complete the details for sending the E-Mail.

Also see

How to send files as an E-Mail attachment: (p. 171)
How to display links to files: (p. 172)
Viewer (p. 165)

9.4.2 Sending files as Email attachments

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

How to send files as an E-Mail attachment:

1. Select one or several files in the display area. Click the **Actions** icon in the tool bar. Click on **Send by e-mail** in the menu.

   You can also use the **Actions** icon in the *Viewer*.
2. On the *Compose* page, complete the details for sending the E-Mail.

Also see

How to send links to files: (p. 171)
How to display links to files: (p. 172)
Sending a new email (p. 58)

9.4.3 Showing the link to a file

You can show the link to a file that is saved in the *Drive* app. You can copy the link to the clipboard and enter an appointment's or a task's description. If clicking on the link in the description, the file is opened in a new page.

How to display links to files:

Select one or several files in the display area. Click the **Actions** icon≡ in the tool bar. Click on **Show internal link** in the menu.

Also see

How to send files as an E-Mail attachment: (p. 171)
How to send links to files: (p. 171)

9.4.4 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. Select a file in the display area. Click the **Actions** icon≡ in the tool bar. Click on **Rename** in the menu.
2. Edit the file name in the *Rename* window. Note the name extension. Click on **Rename**.

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

Also see

How to create or edit a file's description: (p. 172)
How to send links to files: (p. 171)
Viewer (p. 165)

9.4.5 Creating or editing descriptions

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

How to create or edit a file's description:

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

1. Select a file in the display area. If no details are displayed, click on **View** in the tool bar. Enable **File Details**.
2. In order to add a description, click on **Add a description**. In order to edit a description, double-click on the description.

   Enter a new text or change the existing one. Click on **Save**.

You can also use the function in the side bar of the *Viewer*.

Also see

How to edit the file name: (p. 172)
Viewer (p. 165)

9.4.6 Moving files or folders

You can move objects like files or folders to another folder. Allowed objects are:

- one or multiple files
- one or multiple folders
- a combination of files and folders

How to move objects to another folder:

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

1. Select the objects in the display area. Click the **Actions** 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 objects in the display area. Drag the selected objects to a folder in the folder tree.

Also see

How to copy files to another folder: (p. 173)

9.4.7 Copying files

You can copy files to another folder: When copying a shared file, the permission will not be copied. This means, the file's copy is not shared.

How to copy files to another folder:

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

1. Select one or several files in the display area. Click the **Actions** icon ≡ in the tool bar. Select **Copy** from the menu.
2. Select a folder in the *Copy* window. Click on **Copy**.

Also see

How to move objects to another folder: (p. 173)

9.4.8 Adding files to the portal

You can add a file as widget to the Portal.

How to add a file to the portal:

Select a file in the display area. Click the **Actions** icon ≡ in the tool bar. Click on **Add to portal** in the menu.

Also see

Customising the Portal (p. 45)

9.4.9 Deleting files

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

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

How to delete a file:

1. Select one or several files in the display area. Click the **Delete** icon in the tool bar.
   You can also use the **Actions** icon in the *Viewer*.
2. Confirm that you want to delete the selected files.

Result: The selected files are deleted.

Also see

How to recover deleted files: (p. 174)
How to permanently delete a file: (p. 174)
How to permanently delete the content of the Trash folder: (p. 174)

How to recover deleted files:

1. Open the *Trash* folder.
2. Select one or several files.
3. Click the **Actions** 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.

Also see

How to delete a file: (p. 174)
How to permanently delete a file: (p. 174)
How to permanently delete the content of the Trash folder: (p. 174)

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 *Trash* folder.
2. Select one or several files.
3. Click the **Delete** icon
4. Confirm that you want to delete the files.

Result: The files are permanently deleted.

Also see

How to delete a file: (p. 174)
How to recover deleted files: (p. 174)
How to permanently delete the content of the Trash folder: (p. 174)

How to permanently delete the content of the Trash folder:

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

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

Result: The objects in the trash are permanently deleted.

Also see

How to delete a file: (p. 174)
How to recover deleted files: (p. 174)
How to permanently delete a file: (p. 174)

9.4.10 Locking or unlocking files

When editing a file, you can lock the file. The lock has the following purposes:

- The file lock informs other users that the file is currently being edited and might no longer be up-to-date.
- If the file is located in a folder that you share with other users whom you granted edit permissions, those users can not edit the locked file.

How to lock files:

Select one or several files in the display area. Click the **Actions** icon in the tool bar. Click on **Lock** in the menu.

Also see

How to unlock files: (p. 175)

How to unlock files:

Select one or several locked files in the display area. Click the **Actions** icon in the tool bar. Click on **Unlock** in the menu.

Also see

How to lock files: (p. 175)

9.4.11 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:

1. Select a file in the display area. Click the **Download** icon in the tool bar.
2. Complete the steps for opening or downloading.

Also see

How to upload a new version: (p. 176)
How to open or save a certain version: (p. 177)
How to set a certain file version as the current version: (p. 177)
How to delete a certain version: (p. 177)

How to upload a new version:

1. Select a file in the display area. If no side bar is displayed, click on **View** in the tool bar. Enable **File Details**.
2. Click on **Upload new version** in the side bar. Select a file.
3. Enter a version comment.
4. Click on **Upload**.

You can also use the function in the side bar of the *Viewer*.

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

Also see

How to open or save the current version: (p. 176)
How to open or save a certain version: (p. 177)
How to set a certain file version as the current version: (p. 177)
How to delete a certain version: (p. 177)
Viewer (p. 165)
How to add new files: (p. 170)

How to open or save a certain version:

1. Select a file in the display area. If no side bar is displayed, click on **View** in the tool bar. Enable **File Details**.
2. Click the icon next to *Versions* in the side bar. The list of versions is displayed.
   Click on a version. Click the **Download** menu item.
3. Complete the steps for opening or downloading.

You can also use the function in the side bar of the *Viewer*.

Also see

How to open or save the current version: (p. 176)
How to upload a new version: (p. 176)
How to set a certain file version as the current version: (p. 177)
How to delete a certain version: (p. 177)
Viewer (p. 165)

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

1. Select a file in the display area. If no side bar is displayed, click on **View** in the tool bar. Enable **File Details**.
2. Click the icon next to *Versions* in the side bar. The list of versions is displayed.
   Click on a version. Click on the **Make this the current version** menu entry .

You can also use the function in the side bar of the *Viewer*.

Also see

How to open or save the current version: (p. 176)
How to upload a new version: (p. 176)
How to open or save a certain version: (p. 177)
How to delete a certain version: (p. 177)
Viewer (p. 165)

How to delete a certain version:

1. Select a file in the display area. If no side bar is displayed, click on **View** in the tool bar. Enable **File Details**.
2. Click the icon next to *Versions* in the side bar. The list of versions is displayed.
3. Click on a version. Click on **Delete version** in the menu.

You can also use the function in the side bar of the *Viewer*.

Also see

How to open or save the current version: (p. 176)
How to upload a new version: (p. 176)
How to open or save a certain version: (p. 177)
How to set a certain file version as the current version: (p. 177)
Viewer (p. 165)

9.5 Searching for Files

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

- search terms for file names, file descriptions
- Search terms for a time range. Searches for files that have been created or edited within a specific time frame. You define a valid time range with the following details.
  - The key words *today*, *yesterday*, *last week*, *last month*, *last year*
  - The key words for those time intervals: *last 7 days*, *last 30 days*, *last 365 days*
  - A day of the week, e.g. *Monday*
  - A specific month, e.g. *July*
  - A four digit date, e.g. *2015*
  - A date, e.g. *1/31/2015*
  - A date range, e.g. *12/1/2014 - 1/31/2015*
- File type: all, audio, documents, images, other, video
- File size
- Folder type: all, private, public, shared

How to search for files:

1. Click the **Start search** icon or in the input field in the search bar. The folder button indicates the folders to be searched. The **Options** drop-down offers functions for limiting the search.

2. To select a folder for the search, click on the folder button.
   - If you select **All folders**, all private, public, and shared folders and subfolders are searched.
   - If you select a specific folder or the folder, only this folder is searched, but no subfolders.
3. Enter a search term in the input field. The search menu opens.

   Define the data sources to be searched by clicking on an entry in the search menu.
   - If clicking on the search term or pressing enter, the following data sources are searched: file name, description
   - In order to search for files within a specific time frame, use a valid time range as search term. As soon as a valid time range is recognized in your input, the time range is displayed in the search menu. Click on the time frame.
   - 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.

   Result:

   The search results are displayed in the list that is shown in the display area.
4. You have the following options for adjusting the search results:
   - To refine the search results, enter additional search terms: To remove a search term, click the icon next to the search term.
   - To search in another folder, click on the folder button. Select a folder.
   - To limit the search to private, public or shared folders, click on **Options**. Select a folder type.
   - To limit the search to specific files, click on **Options**. Select a type.
   - To limit the search to files with a specific size, click on **Options**. Select a file size.
5. In order to finish the search, click the **Cancel search** icon.

9.6 Accessing Files with WebDAV

With WebDAV you can access the *Drive* app files in the same way as when accessing local files on your disk. Compared with the access from the Groupware GUI, WebDAV has advantages and disadvantages:

- The advantage is the quick and direct access with a file browser e.g. Windows Explorer. You need not be logged in to the Groupware GUI.
- The disadvantage is that you can only see the current document version. Neither the version history nor additional information, like comments, are displayed.

Warning: If you delete a file with WebDAV, all versions will be lost, not only the current version.
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 194).

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

- Setting up WebDAV under Linux
- Setting up WebDAV under Windows 7

9.6.1 Setting up WebDAV under Linux

How to set up WebDAV access under Linux:

1. Open the KDE Konqueror browser or a similar browser.
2. Enter the following address in the address bar:
   webdav://<address>/servlet/webdav.infostore
   Replace the <address> with the Groupware Server's IP address or URL.
3. Enter your username and password for accessing the Groupware Server.

Result: The *Drive* app files are displayed in the browser.

9.6.2 Setting up WebDAV under Windows 7

How to set up WebDAV access under Windows 7:

Prerequisite: The registry key *BasicAuthLevel* has to be set to *2* in the Windows registry database. Additional information can be found in the Microsoft articles http://support.microsoft.com/kb/928692 and https://support.microsoft.com/kb/841215.
Note: Depending on the Windows 7 setup, there can be delays when accessing WebDAV folders. If this is the case, follow the instructions in this article:
http://support.microsoft.com/kb/2445570.

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

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

9.7 Accessing Cloud Storage

If you use third party cloud storages like Google Drive, Dropbox, Box or OneDrive, you can access your cloud storage from within the groupware. The following options are available:

- First you have to set up and edit the third party cloud storage accounts in the groupware.
- Then you can use your cloud storage accounts with the help of the folder tree.

9.7.1 Setting up and editing cloud storage accounts

The following options are available:

- set up cloud storage accounts
- edit cloud storage accounts
- remove cloud storage accounts

How to set up cloud storage accounts:

1. Click on **Add storage account** below the folder tree. The *Add storage account* window opens.
2. Click a cloud storage provider's icon. A new browser window opens.
   Enter your credentials for the cloud storage account. If the cloud storage service asks you for permission to access the data, grant this permission.
   Note: Depending on the provider, the access requests can vary.

An entry for the cloud storage appears in the folder tree. Now you can use the cloud storage.

How to edit the settings of a cloud storage account:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Accounts**.
3. Click on **Edit** next to an account in the display area. The settings are displayed in a window.
4. Change the settings. Click on **Save**.

How to remove a cloud storage account:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Accounts**.
3. Click the **Delete** icon next to an account.

9.7.2 Using cloud storages

The following options are available:

- You can use the folder tree to access the cloud storage contents. Depending on the cloud storage content, you can use the menu bar functions, e.g. to view pictures or to copy data.
- Depending on the content, you can use the menu bar functions, e.g. to view pictures or to copy data.

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 make additional files available for internal users or external partners, proceed as follows:

  Create a new personal or public folder and copy or move the required files to this folder.

  Share this folder.

  You can also share an existing folder.

9.9 DriveSettings

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. Click on **Drive** in the side bar.
3. Change the settings [184].

The following settings are available:

- Show hidden files and folders
- Adding files with identical names

Show hidden files and folders
Defines whether hidden files and folders are displayed. The names of hidden files and folders are preceded by a dot. The local Drive apps require such files and folders for internal purposes. In order to not endanger the functionality of the local Drive apps, such hidden files and folders must not be changed or deleted.

Adding files with identical names
Defines whether a new file or a new version of a possibly existing file with the same name should be created.

If **Add new version** is enabled, a new version of the existing file will be created.

If **Add new version and show notification** is enabled, a new version of the existing file will be created. As soon as the process is finished, you will receive a notification.

If **Add separate file** is enabled, a new file will be created. The file name is enhanced with a consecutive number.

10 Editor

Learn how to work with the *Editor* application.

- create text files
- edit text files

In order to search for text files, organise them or share them with other users, use the *Drive* [159] application.

How to launch the *Editor* 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 *Drive* 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 *Drive* 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 and how to share your data with others.

- Work more efficiently with folder management.
- Learn the basics about permissions.
- Organise your team work with the help of shares.
- When you have set up additional E-Mail accounts, storage accounts or access to social networks, you can edit or remove those accounts.
- Use the data from your social networks like LinkedIn by using subscriptions.

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 [190]
- navigate within the folder structure [190]
- hide [191] certain folders
- add folders to favourites [191]
- create [192], rename,delete [192], and move [192] 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 can be found below *My address books*, *My calenders*, *My tasks*, *My files* in the respective app.
- Public folders
  - Public folders contain contacts, appointments, and documents that are of common interest to all users. Each user can create public folders and share them with other users.
  - The public folders for contacts, appointments, tasks, and files can be found below *Public address books*, *Public calenders*, *Public tasks*, *Public files* in the respective app.
- Shared folders
  - Shared folders have been shared with you by other users with read or write access.
  - The shared folders for contacts, appointments, tasks, and files can be found below *Shared address books*, *Shared calenders*, *Shared tasks*, *Shared files* in the respective app.

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

11.1.2 Navigating within the folder structure

The following functions are available:

- opening or closing the folder tree
- changing the folder tree width
- open or select a folder in the folder tree or by using the navigation path

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 or select a folder:

1. If the folder tree is closed, open it.
2. To view a folder's subfolders, click on the arrow next to the folder name.
3. Click on a folder. The folder's items are displayed in the detail view.
   Additionally have the following options in the *Drive* app.
   Click on an entry in the navigation bar to open a parent folder.
   To open a folder, double-click on it in the detail view.

11.1.3 Hiding folders

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

- hide single folders
- display hidden folders again

Each hidden folder is displayed in a collective folder at the bottom of the folder tree.

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. Depending on the app, open the entry **Hidden address books**, **Hidden calendars** or **Hidden tasks** at the bottom of the folder tree in the *Address Book*, *Calendar* or *Tasks* app. 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 [194]. Depending on the app, there are different ways of creating folders.

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

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

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

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

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

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

11.1.6 Renaming folders

You can rename subfolders in your personal folders. For other folders you need the appropriate permissions [194].

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 [194].

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 [194].

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

- A description of the permissions can be found in 11.2.1: Which permissions can be granted? (page 194).
- A listing of preset permissions for specific folders can be found in in 11.2.2: Permissions for folders that already exist (page 195) and in 11.2.3: Permissions for new folders (page 195).

You can set permissions by sharing [196] E-Mail messages, address books, calendar, tasks, folders or files.

11.2.1 Which permissions can be granted?

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

- Administrator
- Viewer
- Reviewer
- Author

You can change the preset permissions by granting detailed permissions.

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

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

Viewer
A viewer can read all existing objects. A viewer has no other permissions.

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

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

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

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

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

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

- folders
  - view the folder
  - create objects
  - create objects and subfolders
- read permissions
  - none
  - read own objects
  - read all objects

- write permissions
  - none
  - edit own objects
  - edit all objects
- delete permissions
  - none
  - delete own objects
  - delete all objects

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. The owner has the same permissions as an administrator.
- 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 [195]
- in a public folder [195]
- in a shared folder [195]

If you create a new folder in a personal folder:

- You are the owner.
- In the *E-Mail* app and the *Drive* app, other users inherit their permissions for the parent folder. In the other apps, other users do not inherit permissions.

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

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

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

- The user who shared the folder is the administrator of the new folder.
- You are the author of the new folder.
- Other users will get the same rights as for the parent folder.

Note: You need to have permission to create objects in the shared folder.

11.3 Sharing

By sharing E-Mail messages, address books, calendars, tasks, folders or files with read or edit access, you can co-operate with internal users or external partners. There are the following limitations for sharing objects:

- In order to share data, you need to have administrator permissions for the respective folder.
- The global address book can not be shared.
- E-Mail messages can only be shared with internal users, not with external partners.
- Address books, calendars, and tasks can only by shared with external partners with read access, not with edit access.

The following options are available:

- You can create a public link to share data with read access. You can give this link to other people.
- You can invite internal users or external partners to a shared item to share data with specific people with read or edit access.
- You can access data shared by other users.
- You can manage your own shares by changing, adding or removing permissions.
- In the Drive app, you can view your shared files and folders in an overview page.

11.3.1 Sharing with public links

You can share data with read access by creating a public link. You can give this link to other people. Everyone who gets this link can view the data. The following options are available:

- You can share the following data with read access by using a public link: address books, calendars, tasks, folders. files.
  E-Mail messages cannot be shared with a public link.
- You can set a password for the access. You can define that the link expires after a specific time frame, e.g.: after one month.
- You can revoke the public link.

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

1. Select the app that should be used for sharing data.

   Select a folder in the folder tree.

   Note: Select a folder for which you have the permission to share. Depending on the app, some folders cannot be shared.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Get a link**.

   In the Drive app, you can also click the **Share** icon in the tool bar. Click on **Get a link**.

   The window for sharing objects will be opened. It contains a public link for a read access to the share.
3. Use the following methods:
   - To insert the link into other applications, click the **Copy to clipboard** icon next to the link.
   - In order to directly send the link by E-Mail, enter the respective E-Mail addresses. You can enter a message for the recipients.
   - By default, the data are shared with read access for an unlimited time. To set a time limit for the access to the shared data, enable **Expires in**. Select a time range.
   - To protect the access with a password, enable **Password required**. Enter a password. If you send the public link by E-Mail, the E-Mail contains the password.
4. Click on **Close**.

Tips:

- In order to view the public link again, repeat the first two steps.
- In the Drive app, you can also share a single file. To do so, proceed as follows:
  1. Select the file in the display area.
  2. Click the **Share** icon in the tool bar.

Similar actions

How to invite internal users or external partners to a share: (p. 199)

11.3.2 Inviting to a shared item

In order to share data with specific people with read or edit access, you can invite internal users or external partners to a shared item. The users will receive an E-Mail invitation. If an external partner accesses the share, the partner will automatically be logged in as a guest user. The following options are available:

- You can share E-Mail messages with internal users with read access.
- You can share address books, calendars and tasks with internal users with read or edit access, with external partners only with read access.
- You can share folders and files with internal users and external partners with read or edit access.

When sharing items, internal users or external partners are granted certain permissions for the shared data. Information on permissions can be found in 11.2: Permissions (page 194). Note the following:

- You cannot share your personal *Inbox* folder. In order to grant other users access to your E-Mail messages, share an E-Mail folder that is located below your *Inbox* folder. Other users have to subscribe to this E-Mail folder then.
- You have the exclusive administrator rights for your personal address book, calendar and task folders. You cannot grant administrator rights for these folders to other users.

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

1. Select the app that should be used for sharing data.

   Select a folder in the folder tree.

   Note: Select a folder for which you have the permission to share. Depending on the app, some folders cannot be shared.

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

   In the Drive app, you can also click the **Share** icon in the tool bar. Click on **Invite people**.

   The window for adjusting the permissions opens.

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

   If required, enter a message.

4. To edit the permissions for internal users, you have the following options.
   - To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.
   - To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu.
   - In order to remove a permission, click the **Action** icon next to the name. Click on **Revoke access**.

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

6. If no E-Mail notifications about the shared item are to be sent, disable **Send notifications**.

   Note: The checkbox cannot be enabled when inviting external partners to a shared item.

7. Click on **Save**.

Similar actions

How to share data with read access by using a public link: (p. 197)
How to edit existing permissions: (p. 202)
How to resend an invitation to a person: (p. 202)

11.3.3 Accessing shared data

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

How to access data shared by other users:

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

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

   Tip: To see the permissions that have been granted for the shared folder, click the **Folder-specific actions** icon . Click on **Permissions / Invite people**.
2. Open the folder to display its contents.
3. Select one or several objects. Use the function bar entries.

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

11.3.4 Managing own shares

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

- edit the existing permissions:
    adjust user role or permissions
    add a new person
    remove permissions for a person
- resend an invitation to a person
- remove all existing permissions for a file or a folder in the Drive app

Information on permissions can be found in 11.2: Permissions (page 194).

How to edit existing permissions:

1. In the folder tree, select a folder that you shared.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Permissions / Invite people**.
   You can also click the **Shared** icon next to the folder name.
   In the Drive app, you can also click the **Share** icon in the tool bar. Click on **Invite people**.
   The window for adjusting the permissions opens.
3. You have the following options for changing permissions.
   - To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.
   - To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu. **Notes:**
     You cannot change the administrative rights of a personal folder.
     Permissions cannot be changed for public links.
     Guests only get read permissions. You cannot change this permission.
   - In order to add new permissions, enter an E-Mail address in *Add people*. The E-Mail address will be added to the list as internal user, group or guest.
   - In order to remove a user's permissions, click the **Actions** icon next to the user's name. Click on **Revoke access** in the menu.
4. Click on **Save**.

Similar actions

How to resend an invitation to a person: (p. 202)
How to remove all permissions for a file or a folder in the Drive app (p. 202)

How to resend an invitation to a person:

1. In the folder tree, select a folder that you shared.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Permissions / Invite people**.
   You can also click the **Shared** icon next to the folder name.
   In the Drive app, you can also click the **Share** icon in the tool bar. Click on **Invite people**.
   The window for adjusting the permissions opens.
3. Click the **Actions** icon next to a user name. Click on **Resend invitation** in the menu.
4. Click on **Save**.

Similar actions

How to edit existing permissions: (p. 202)

How to remove all permissions for a file or a folder in the Drive app

1. In the Drive app, open **My shares** in the folder tree.
2. Select a share in the detail view. Click on **Revoke access** in the tool bar.

Similar actions

How to edit existing permissions: (p. 202)

11.3.5 Viewing your own shares in the Drive app

To get an overview of your shared files and folders in the Drive app, you can display all your shares as a list. In addition, the following options are available:

- You can sort the list by different criteria.
- You can display the content of a share's parent folder.

How to view your shares in the Drive app:

1. In the Drive app, open **My shares** in the folder tree.

   The folders and files shared by you are displayed in the detail view. For each share a row with the following details is displayed.
   - An icon indicates the share's object type: file or folder.
   - The share's name and folder path. To open a folder, click on a path entry.
   - Three icons in different colours indicate whether an object has been shared with specific users.
     - The icon indicates whether the object has been shared with internal users.
     - The icon indicates whether the object has been shared with guest users.
     - The icon indicates whether the object has been shared by using a public link.
   - The share's creation date.
2. You can do the following:
   - To sort the shares list, click on **Sort by** above the list. Select an entry.
   - To display the content of a share's parent folder, click on a path entry in the list.

11.4 Accounts

The following options are available:

- Editing the primary E-Mail account (p. 204)
- Editing accounts (p. 205)
  You can edit these accounts: external E-Mail accounts, storage accounts, accounts for social networks
- Removing accounts (p. 205)

11.4.1 Editing the primary E-Mail account

The following options are available:

- You can change the name of your primary E-Mail account. This name is displayed in the E-Mail settings.
- Change the preset sender name.
- You can change the folders of your primary E-Mail account by assigning other folders to a standard folder.

How to edit the primary E-Mail account:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Accounts**.
3. Click on **Edit** next to *E-Mail* in the display area. The *Edit mail account* window displays the current settings.
4. To change the account name, click into the input field next to **Account name**.
   Note: The entries for *Incoming server* and *Outgoing server* cannot be changed.
5. To change the preset sender name, click into the input field next to **Your name**.
   You can overwrite this preset name when composing an E-Mail.
6. To select other folders, browse down to *Standard folders*.
   Click on **Select** next to a folder. Select another folder.
7. Click on **Save** at the bottom of the window.

11.4.2 Editing accounts

Depending on the account type, you can edit different account settings.

- For E-Mail accounts: account name, sender name, Unified Mail usage, server parameters, folder names
- For storage accounts: folder name, re-authorisation of the data access
- For social networks: account name, re-authorisation of the data access

How to edit an account:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Accounts**.
3. Click on **Edit** next to an account in the display area. The settings are displayed in a window.

   If you use multiple services from the selected provider e.g., E-Mail and cloud storage, select the service you want to edit.
4. Change the settings.

   Notes for editing external E-Mail accounts:

   To change the preset sender name, click into the input field next to **Your name**.
   You can overwrite this preset name when composing an E-Mail.
5. Click on **Save** at the bottom of the window.

11.4.3 Removing accounts

If you no longer want to access an account from within the groupware, you can delete this account. You can remove all accounts except your primary E-Mail account.

How to remove an account:

1. Click the **Settings** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Accounts**.
3. Click the **Delete** icon

11.5 Subscriptions

Subscriptions allow using data from social networks within the groupware. The following options exist:

- Import contacts from social networks and appointments from other calendars by subscribing to that data.
- Keep the overview of your subscribed data by managing them on a common overview page.

11.5.1 Subscribing to data

The following options are available:

- Subscribe to contacts from social networks.
- Subscribe to appointments from your Google calendar.
- Refresh subscribed data
- Disable, enable, change or delete a subscription. Information can be found in Managing subscribed folders (page 207)

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 *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 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. In the side bar, click on **Subscriptions**.
3. Click on **refresh** next to a subscription in the display area.

11.5.2 Managing subscribed folders

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

- show all subscriptions
- disable or enable a subscription
- edit a subscription's settings
- remove a subscription
- edit or remove a social network's account

How to display all subscriptions:

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 **Subscriptions**.
3. Use the following functions to view more details:
   To show the folder of the subscription, click on the navigation path below the subscription's name.

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

How to disable or enable a subscription:

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 **Subscriptions**.
3. Click on **Disable** or **Enable** in the display area next to a subscription.

How to edit a subscription's 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 **Subscriptions**.
3. Click on **Edit** next to a subscription in the display area.
4. Change the settings. In order to finish the process, click on **Subscribe**.

How to remove a subscription:

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 **Subscriptions**.
3. Click the **Delete** icon next to a user name.

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.

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 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 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 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 folder name. Click on **Export**.
3. Select a data format. Click on **Export**.

13 Questions and Answers

General questions

Where can I find my personal data and settings?

You can customise the following data and settings:

- Learn how to change your personal data.
- Learn how to customise the basic settings.
- Learn how to set up additional email accounts [83].

How can I change my password?

In order to change your password, click on **My password** in the *User data* widget in the *Portal* app. Learn more from 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 **Actions** 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 to the right side of the menu bar shows the number of new objects. Click the icon to open the *Notification Area*. It contains information about the new objects. From there you can also directly activate functions, e.g. read the new E-Mail or confirm the new appointment. Information can be found in The User Interface.

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

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

Questions about Email Messages and contacts

How can I send an email to multiple addresses at once?

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

- Enter all recipients in the input fields **To...**, **Copy to...** or **Blind copy to...**. Use the auto-complete function to more easily enter the addresses. This FAQ list provides an explanation of the differences between the input fields.
- If you regularly send 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 98).

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 71).

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 83).

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 65).

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 76).

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 by subscribing to the contacts. Information can be found in Subscribing to data (page 206).

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 Creating E-Mail reminders (page 71).

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 125).

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. Share this contact folder. Information can be found in Sharing (page 196).

How can I share specific documents with my external partners?

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

1. In the *Drive* app, you can collect the documents in a separate folder.
2. Share this folder. Information can be found in Sharing (page 196) .

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

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

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

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

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

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

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

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

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

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

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

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