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.

- Target Groups, Contents (p. 12)
- Terminology (p. 13)

1.1 Target Groups, Contents

This documentation is addressed to the end user.

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

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

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

1.2 Terminology

Account

An account or a user account is an access permission to a computer system. Account examples:

- groupware account
- GMail account
- DropBox account
- Facebook account

To get access, a user has to log in with the user name and the password. Based on the account, the computer system identifies the individual users. This allows assigning specific properties to a user, like access permissions or settings.

Related topics:

Managing Accounts (p. 308)

All users address book

Contains the address data for all users. Depending on the configuration, each user can edit their own personal data in this address book.

Depending on the configuration, this address book can have a different name, e.g. *Internal users* or *Global address book*.

App

An application is a groupware component that provides certain functions. Example: With the E-Mail application you can send, receive and organise E-Mail messages.

Categories

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

Categories allow you to organise email messages, appointments, contacts and tasks across apps, independently from the folder structure. This allows logically related objects to be identified and found more easily, for example all email messages, appointments, contacts and tasks that belong to a specific project or customer. Depending on the configuration, specific categories are predefined. You can set your own categories.

Note: For email messages, you can also use inbox tabs.

Related topics:

Using Categories (p. 312)

Deputy

A deputy is an internal user who manages the email communication or appointment scheduling on another internal user's behalf. For this purpose, the deputy are granted permissions for some actions:

- read, send or organise another user's email messages
- schedule, edit or organise another user's appointments

Related topics:

Managing Deputies (p. 305)
Sending or Receiving Email Messages as Deputy (p. 122)
Creating, Editing or Managing Appointments as Deputy (p. 184)

Distribution list

A distribution list consists of a distribution list name and a number of email addresses. You can create and edit your own distribution lists. Other users cannot see your distribution lists. Distribution lists can be used as follows:

- send an email to multiple contacts
- add multiple persons to an appointment or task
- grant multiple persons permissions by inviting to a shared item

Depending on the configuration, specific distribution lists are predefined for all users.

Related topics:

Adding Distribution Lists (p. 210)

Domain

A domain is the address used to open a page on the Internet. Example: www.example.com. A domain is often also referred to as web address or Internet address.

E-Mail thread

An E-Mail thread is an E-Mail conversation The E-Mail thread includes the original E-Mail and all replies. All E-Mail messages in an E-Mail thread have the same subject. The current E-Mail corresponds to the last reply.

Related topics:

The E-Mail list view (p. 72)
The E-Mail detail view (p. 73)

elements

Elements of the user interface. Example: windows, labels, buttons.

Related topics:

General Description of the User Interface (p. 22)

External email account

Your groupware email account. You will automatically get this account. You cannot delete this account.

Related topics:

Editing the primary E-Mail account (p. 309)

External email account

The administrator can set up functional email accounts and assign them to specific users. A functional email account has the following properties:

- It serves a specific purpose like communicating with customers. Typical examples are support@example.com, info@example.com.
- It can be used jointly by multiple users, to read, reply or send email messages.
  The administrator defines the users who are allowed to use a functional email account.
- Users can neither edit nor delete a functional email account.

Related topics:

Disabling or enabling functional email accounts (p. 310)

External participant

A participant of an appointment or task who is not an internal groupware user but a guest user.

Related topics:

Guest
User
Adding participants or resources when creating an appointment (p. 154)

Folder

Folders contain app specific objects. In some apps, folders can also include subfolders. Some folders are preset, other folders can be set up by the user. Folder examples: email folders, address books, calendars, task lists

Related topics:

The folder view (p. 27)
Managing Data with Folders (p. 288)

group

A group consists of a group name and a number of internal users. Groups can be used as follows:

- add to an appointment or task
- grant permissions by inviting to a share

Depending on the configuration, specific groups are predefined. Depending on the groupware configuration, users can get the permission to create additional groups.

Related topics:

Using Groups (p. 185)

groupware

The software described in this documentation. It includes the PIM functions (Personal Information Manager) email, contacts, calendar. This includes functions for cooperating within a group, like shared address books and calendars. Depending on the configuration, further functions are available: task management, file storage for private or shared files, document processing.

Related topics:

Groupware Definition (p. 18)

Guest

A person who received an invitation to a shared object by another user or has been added to an appointment or task as external participant is called guest or guest user. Guests only have access to objects they have been invited to. Some objects cannot be shared with a guest, e.g. The *All users* address book.

Related topics:

User
External participant

inbox categories

Inbox tabs provide an easy and simple way of keeping the *Inbox* folder neat. With tabs, incoming email messages are saved separated by sender in the *Inbox* folder. Depending on the configuration, specific inbox tabs are predefined. You can set additional inbox tabs according to your needs.

The inbox tabs can only be used in the *Inbox* folder. If you need additional storage options, use the folder view to create email folders.

Note: The inbox categories described here can only be used for emails message. Depending on the configuration, you can use separate categories for email messages, appointments, contacts and tasks.

Related topics:

Working with inbox categories (p. 99)

Managed resource

Managed resources are rooms or devices that can be added to an appointment.

In contrast to regular resources, a managed resource will only be booked if a resource delegate confirms the booking. This is to ensure that the resource cannot be booked until it has been prepared for its next use. Example:

- A conference room has to be equipped with a video projector.
- A vehicle has to be charged or refueled.

Otherwise a managed resource has the same characteristics as a regular one.

Related topics:

Using Managed Resources (p. 187)
Adding participants or resources when creating an appointment (p. 154)
Resource

Objects

Objects are groupware data that are created and organised by the user. Examples: E-Mail messages, contacts, appointments, tasks, documents, files, folders, address books, calendars

Participant

A user invited to an appointment or task. Participants are also called internal participants, in contrast to an external participant who has been invited as guest.

Resource

Resources are rooms or devices that can be added to an appointment. A resource consists of a resource name, an E-Mail address and an optional description.

You can only add resources that are not used for other appointments.

Depending on the configuration, specific resources are predefined. Depending on the configuration, users can get the permission to create additional resources.

Related topics:

Using Resource Calendars (p. 178)
Using Resources (p. 186)
Managed resource

Session

A session is a connection between a client, e.g. a browser, an E-Mail client or a smartphone app and a server, e.g. the groupware server. A session starts with the login and ends with the logout.

Related topics:

Displaying or Signing Out from Active Clients (p. 318)

User

Persons with a groupware account are called users or internal users. Each user has a username and a password. The *All users* address book contains the contact data of all users.

Related topics:

Account
Guest

User interface

This refers to the groupware user interface. The user interface consists of individual elements.

Related topics:

General Description of the User Interface (p. 22)

2 First Steps

You should have a look at these topics before starting to work with the groupware:

- Groupware Definition (p. 18)
- Signing in, Signing out (p. 20)
- Changing the Password (p. 21)
- General Description of the User Interface (p. 22)
- Notes on Use on Mobile Devices (p. 36)

2.1 Groupware Definition

Learn which applications are part of the groupware [15]. Get an initial insight into the tasks that can be accomplished using the applications.

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

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

Learn more: Portal (p. 57)

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 organize 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: E-Mail (p. 67)

Calendar
Keep an overview of your private and business appointments.

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

Learn more: Calendar (p. 129)

Address Book
Organise and maintain your private and business contacts.

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

Learn more: Address Book (p. 193)

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 lists 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: Tasks (p. 229)

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

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

Learn more: Drive (p. 253)

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

- Use personal folders for sorting your email messages, and groupware data.
- Support your team by sharing certain folders with read or write access.
- Benefit from the information of others by using objects in public or shared folders for your work.

Learn more: Data Organisation and Shares (p. 287)

2.2 Signing in, Signing out

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

How to sign in to the server:

1. Open a web browser.
2. Enter the server address in the address bar. The login page 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.

   If you set up two-factor authentication, an additional page is displayed. Enter the authentication data on this page.

How to sign out:

1. Click the **My account** icon in the menu bar. Click on **Sign out**.

   You can also click on **Sign out** in the App Launcher.
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.

2.3 Changing the Password

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

Depending on the configuration, the following options are available for changing the password:

- use the settings
- use the *User data* widget

How to change your password in the settings:

1. Click the **Settings** icon ⚙ on the right side of the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Basic** in the left pane.
   In **Advanced settings**, click on **Change password**.
3. Change your password.

How to change your password in the *User data* widget:

1. Click the **All Applications** icon ≡ in the menu bar. Click on **Portal** in the App Launcher.
2. If the *User data* widget is not displayed, click on **Add widget** on the upper right side. Click on **User data**.
   Click on **My password** in the *User data* widget.
3. Change your password.

User interface:

The menu bar (p. 23)
User data widget (p. 59)

Related topics:

Adjusting the General Settings (p. 39)

2.4 General Description of the User Interface

Learn which basic elements [14] are part of the user interface [16] and where they are located.

Detailed descriptions of the app specific user interface elements can be found in the app specific topics. Links to the app specific topics can be found at the end of each following topic.

The user interface includes the following elements:

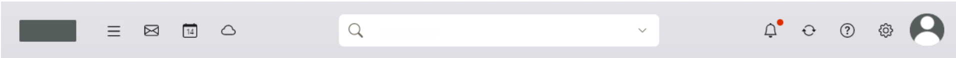
- The menu bar (p. 23)
- App Launcher (p. 25)
- The button for creating new objects (p. 26)
- The folder view (p. 27)
- The tool bar (p. 28)
- The display area (p. 29)
- The list view (p. 30)
- The detail view (p. 31)
- The pop-up (p. 32)
- The notification area (p. 33)
- The editing window (p. 34)
- Using browser buttons (p. 35)

For certain actions the following option is available:

- Using browser buttons (p. 35)

2.4.1 The menu bar

Note: The following is a schematic representation.



Content

- **All Applications** icon ≡. Opens a menu with icons for launching an app.
- Depending on the configuration: Quick launch icons for launching frequently used apps.
  The context menu allows you to define the apps that should be displayed as quick launch icons.
- **Search field**. Allows searching the groupware objects of the current app.
- **Notifications** icon. The icon is displayed when receiving a new notification. The icon notifies you of the number of new notifications e.g., new appointment invitations. If clicking the icon, the notification area opens.
- Depending on the configuration: **Call history** icon. Opens the call history that shows all calls or missed calls. If clicking on an entry, the window for calling this contact will be opened.
- **Refresh** icon. Reloads objects from the server. Irrespective of this function, objects are refreshed in regular intervals.
- **Help** icon. Opens a menu with additional functions:
  - **Help**. Opens a context related help page.
    Tip: Some windows also include the help icon. If clicking on it, the respective help for the window context is displayed.
  - **Keyboard shortcuts**. Shows the currently set keyboard shortcuts for executing frequently used functions.
    Tip: In the **Keyboard shortcuts** section of the general settings, you can select a profile for the keyboard shortcuts.
  - Giving feedback about the groupware
  - Depending on the configuration, there are several guided tours that help you get started with the groupware.
  - **About**. Shows information about the groupware.
- **Settings** icon. Opens a menu with additional functions:
  - Adjust all settings
  - Select a theme for the user interface
  - Depending on the app, functions for selecting a layout, app-specific display options or app-specific functions will be available.
  - Depending on the configuration: **Connect your Device**. Launches a wizard for setting up local apps with which you can access your groupware data.
- **My account** icon. Opens a menu with additional functions:
  - Depending on the configuration: Icons for setting your availability for calls.
  - **Download personal data**. Opens a window where you can adjust your personal contact data.
  - **Sign out**. Signs you out from the groupware.

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

Related topics:

App Launcher (p. 25)
The notification area (p. 33)

Adjusting the General Settings (p. 39)
The E-Mail settings menu (p. 69)
The Calendar settings menu (p. 131)
The Address Book settings menu (p. 195)
The Tasks settings menu (p. 231)
The Drive settings menu (p. 255)

Using a Wizard to Set Up Local Apps (p. 47)
Changing Personal Contact Data (p. 46)
Changing the Password (p. 21)

2.4.2 App Launcher

Note: The following is a schematic representation.

In order to show the app launcher, click the **All Applications** icon ≡.

Content

- Icons for launching the apps. Depending on the configuration, the number of icons can vary.
- Buttons: view help, give feedback, view settings, sign out

Related topics:

The menu bar (p. 23)

2.4.3 The button for creating new objects

Note: Depending on the app, the button label varies. The following is a schematic representation.

Creates app specific objects. Depending on the app, the **More actions** icon opens a menu for creating objects for other apps. You can then e.g. enter a new appointment in the E-Mail app or enter a new contact without leaving the E-Mail app.

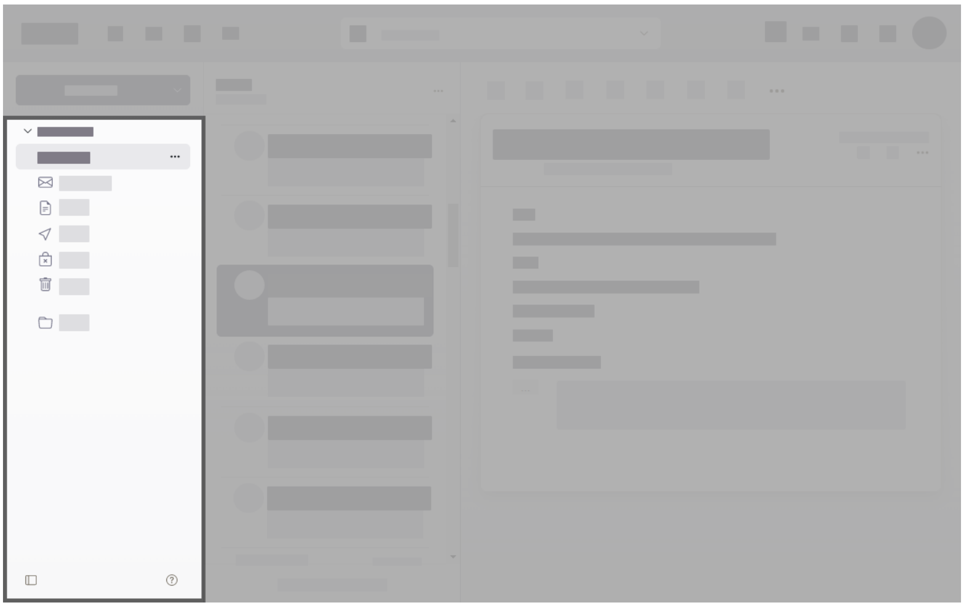
Note: If the folder is closed, the button will be displayed as an icon. In this case, the **More actions** icon will not be available. To show the folder view, click the **Open folder view** icon on the bottom left side.

Related topics:

The folder view (p. 27)
The New email button (p. 69)
The New appointment button (p. 131)
The New contact button (p. 195)
The New task button (p. 231)
The New button (p. 255)

2.4.4 The folder view

Note: The folder view contents are different for each app. The following is a schematic representation.



Content

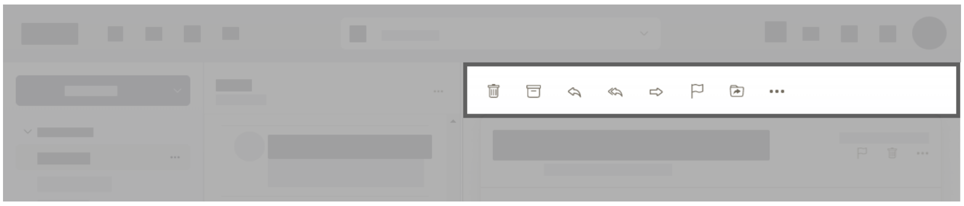
- The app specific folders
  Folders are called differently in the following apps:
  - In the Address Book app, a folder is called address book.
  - In the Calendar app, a folder is called calendar.
  - In the Tasks app, a folder is called list.
- **Close folder view** icon or **Open folder view** icon. If the folder view is closed, either no folders or only some folders will be displayed as icons, depending on the app.

Related topics:

The button for creating new objects (p. 26)
Managing Data with Folders (p. 288)
What are folder types? (p. 289)
The E-Mail folder view (p. 70)
The Calendar folder view (p. 133)
The Address Book folder view (p. 196)
The Tasks folder view (p. 231)
The Drive folder view (p. 256)

2.4.5 The tool bar

Note: The tool bar contents are different for each app. The following is a schematic representation.



Content

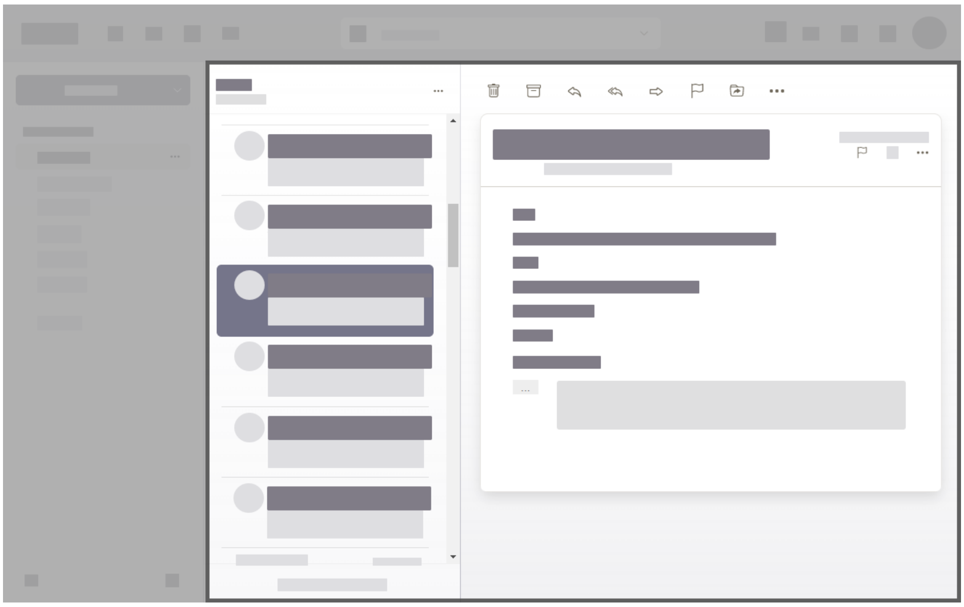
- Depending on the app, different buttons and icons for editing objects

Related topics:

The E-Mail tool bar (p. 71)
The Calendar tool bar (p. 134)
The Address Book tool bar (p. 196)
The Tasks tool bar (p. 232)
The Drive tool bar (p. 257)

2.4.6 The display area

Note: The display area contents are different for each app. The following is a schematic representation.



Content

- Contains objects or a list of objects and a detailed view of a selected object.
- Depending on the function selected, different contents will be displayed e.g., app-specific settings.

Related topics:

The list view (p. 30)
The detail view (p. 31)
The Drive display area (p. 258)

2.4.7 The list view

Note: Depending on the app, the contents of the list view vary. The following is a schematic representation.

Content

- Contains the app-specific objects. To adjust the list view width, hover over the line between the list view and the detail view.
- Above the list view, control elements for selecting or sorting objects are displayed.
- If double-clicking on an object in the list view, the content will be displayed in a window.

Related topics:

The display area (p. 29)
The E-Mail list view (p. 72)
The Calendar list view (p. 138)
The Address Book list view (p. 197)
The Tasks list view (p. 232)

2.4.8 The detail view

Note: Depending on the app, the contents of the detail view vary. The following is a schematic representation.

Content

- Shows the details of the object selected in the list view.

Related topics:

The display area (p. 29)
The E-Mail detail view (p. 73)
The Calendar detail view (p. 138)
The Address Book detail view (p. 198)
The Tasks detail view (p. 233)

2.4.9 The pop-up

Note: The pop-up contents are different for each app. The following is a schematic representation.

Shows an object's details. The following actions open the pop-up:

- clicking on an email, an appointment or a task in the app Portal
- clicking on a sender or recipient in an E-Mail's detail view
- clicking on an appointment's or a task's participant
- clicking on an appointment in a calendar view
- clicking on a notification in the notification area

Content

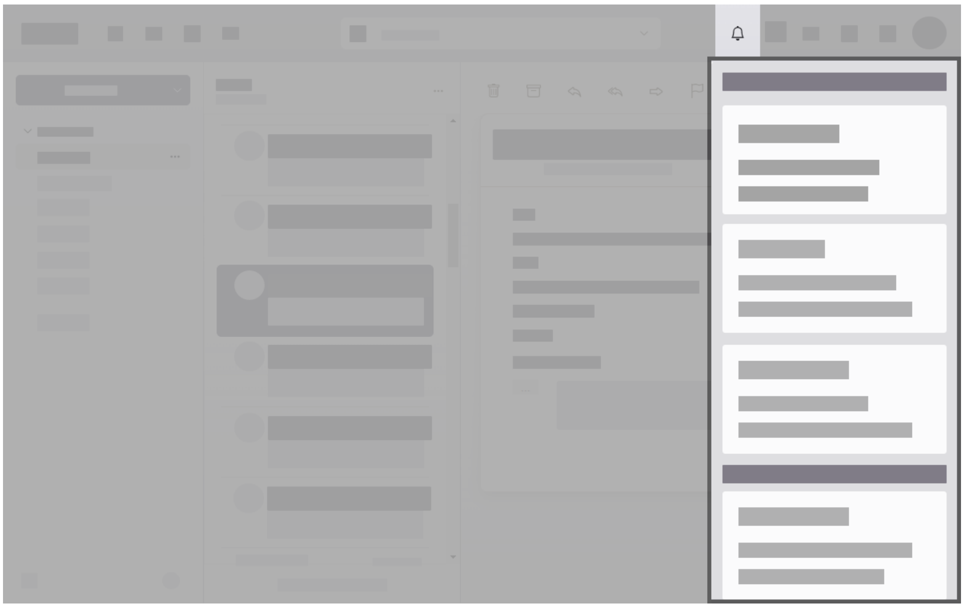
- Buttons for executing frequently used functions.
- The data of the object selected by you. The display of a person's data is called **Halo View**.
- If clicking on certain objects in the pop-up, an additional pop-up opens.

Related topics:

The notification area (p. 33)
The E-Mail pop-up (p. 74)
The Calendar pop-up (p. 137)
Displaying contacts in the halo view (p. 204)

2.4.10 The notification area

Note: The following is a schematic representation.



Displays notifications about the following events:

- reminders for upcoming events
- invitations for new events

If there are new notifications, the icon will be marked with a red dot. To open the notification area, click the **Notifications** icon in the menu bar.

Content

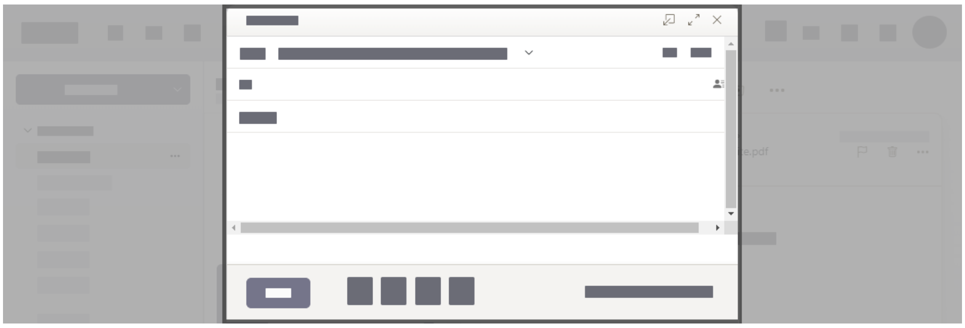
- Reminders for upcoming appointments or tasks
  Next to **Reminders**, the number of reminders will be displayed.
- Invitations for new appointments and tasks
  Next to **Invitations**, the number of invitations will be displayed.
  For each invitation, buttons for replying to the invitation will be displayed.
- Booking requests for managed resources.
  For each booking request, buttons for replying to the booking request will be displayed.
- Overdue tasks
  Next to **Overdue tasks**, the number of overdue tasks will be displayed.
- In **Information area** in the notification settings, you can enable the option for displaying upcoming birthdays.
- If clicking on a notification, a pop-up opens or closes. The pop-up shows the details for the event and provides editing functions.
- With the **Toggle category** icons you can expand or collapse single parts of the notification area.

Related topics:

The menu bar (p. 23)
The pop-up (p. 32)
Adjusting the General Settings (p. 39)
Using the Notification Area (p. 45)
Responding to Appointment Invitations (p. 160)
Responding to Task Invitations (p. 240)

2.4.11 The editing window

Note: The editing window contents are different for each app. The following is a schematic representation.



The following actions open the editing window:

- creating or editing objects
- editing the personal contact data
- creating or editing simple text files

Content

- The title bar includes the following elements:
    - window title
    - icons for setting the window position:
        - **Minimise** icon. Displays the editing window as an icon at the bottom.
        - **Maximise** icon. Displays the editing window in its maximum size. If clicking the icon again, the original size is restored. You can also double-click on the title bar again to toggle the window sizes.
- Depending on the app or function, various buttons, icons or input fields are available.

Properties

- You can move an editing window.
- You can activate additional functions while an editing window is open.
- You can open multiple editing windows.
- Minimised editing windows are displayed as icons at the bottom. In order to restore an editing window, click the icon.

Related topics:

The email editing window (p. 75)
The appointment editing window (p. 140)
The contact editing window (p. 199)
The distribution list editing window (p. 200)
The editing window (p. 234)

Displaying contacts in the address list (p. 203)
Changing Personal Contact Data (p. 46)
Creating Text Files (p. 270)
Editing Text Files (p. 271)

2.4.12 Using browser buttons

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

With browser buttons, you can execute certain navigation steps within the groupware. With the **Back** or **Forward** browser button, you can undo or redo the following navigation steps:

- switch between the apps
- switch between views: list view, detail view, folder view, pages in the *Settings* window
- open or close the notification area
- open or close the search view
- open or close the *Settings* window

On mobile devices, the following navigation steps can be undone in addition:

- open or close menus
- toggle the mode for selecting folders
- toggle the mode for selecting items

Related topics:

Notes on Use on Mobile Devices (p. 36)

2.5 Notes on Use on Mobile Devices

You can also utilise the groupware on your Android or iOS mobile device. Compared to the usage on a computer, there are the following differences:

- The user interface automatically adjusts to the smaller screen.
- Depending on the app, certain screen layouts might not be available. The available layouts are adapted to the screen size of mobile devices.
- Buttons and menus are largely arranged in the same way as on mobile devices.
- The user interface follows the standards for mobile devices.
- Depending on the app, seldom used functions and settings might not be available.

How to launch the groupware on a mobile device:

1. Open a web browser.
2. Enter the server address in the address bar. The login page will be displayed.
   Enter your username and your password. Note that they are case-sensitive.
3. To save your credentials locally, enable **Stay signed in**.
4. Tap on **Sign in**.
   If you set up two-factor authentication, an additional page is displayed. Enter the authentication data on this page.

Tip: To simplify future logins, launch the groupware and create a desktop shortcut.

To do so, open your browser's system menu. Select **Add to home screen**.

If you launch the groupware by tapping the icon, the browser's address bar will not be displayed. This saves space for the groupware interface.

Note: This user guide describes how to use the groupware on a computer. The operation on a mobile device follows the usual processes on mobile devices.

Related topics:

Using browser buttons (p. 35)

3 Customised Settings

Learn how to customise the groupware's design and behaviour to fit your personal needs:

- Searching for Settings (p. 38)
- Adjusting the General Settings (p. 39)
- Customising the Notifications (p. 41)
- Using Countdowns for Appointments (p. 44)
- Using the Notification Area (p. 45)
- Changing Personal Contact Data (p. 46)
- Using a Wizard to Set Up Local Apps (p. 47)
- Setting the Presence Status (p. 48)

Related topics:

Email Settings (p. 124)
Calendar Settings (p. 190)
Address Book Settings (p. 227)
Drive Settings (p. 284)

3.1 Searching for Settings

You can search for a specific setting using a search term. All settings are searched in the process.

How to search for a setting:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Enter a search term in **Search**.
   If settings matching the search term are found, the results will be displayed in the left pane.
3. Click on a result in the left pane.
   The page with the setting will be displayed. The respective setting will be highlighted.
4. In order to hide the search results, click the **Cancel search** icon × next to the search term.

Related topics:

Adjusting the General Settings (p. 39)
Customising the Notifications (p. 41)
Using Countdowns for Appointments (p. 44)
Email Settings (p. 124)
Calendar Settings (p. 190)
Address Book Settings (p. 227)
Drive Settings (p. 284)
GuardSettings (p. 355)

3.2 Adjusting the General Settings

In the general settings, you can select the colour for the user interface, language, regional settings and other personal settings.

How to open the general settings:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Click on **Basic** in the left pane.

The settings can be found in the following sections:

- Theme (p. 40)
- Language and time zone (p. 40)
- Apps (p. 40)
- Keyboard shortcuts (p. 40)
- Advanced settings (p. 40)

Also see: Searching for Settings (p. 38)

Theme

- **accent colours**

  Defines the colour for highlighted elements.
- **backgrounds**

  Defines the user interface colour.

Language and time zone

- **Language**

  Defines the user interface language.
- **Customise date and time formats**

  Opens a window for customising regional settings.
  - Time format
  - Date format
  - Number format
  - First day of the week
  - First week of the year

  The preset regional settings depend on the selected language. In **Preview**, a preview of the current date and time formats will be displayed.
- **Timezone**

  Defines the time zone to which all time-bound entries refer.
  Also see Displaying multiple time zones (p. 143)

Apps

- **Start app**

  Defines the application that is displayed after login.
- **Configure quick launch bar**

  Opens a window that allows you to define the apps that should be displayed as quick launch icons in the menu bar. Depending on the configuration, you can set a different number of quick launch icons. You can also open the window from a quick launch icon's context menu.

Keyboard shortcuts
Defines which keyboard shortcuts for frequently used functions are enabled.

Advanced settings

- **Look for new data every**

  Defines the interval for retrieving new objects from the server.
- **Manage categories**

  See Using Categories (p. 312)
- **Manage deputies**

  See Managing Deputies (p. 305)
- **Change password**

  See Changing the Password (p. 21)

Related topics:

Searching for Settings (p. 38)
Customising the Notifications (p. 41)
Using Countdowns for Appointments (p. 44)
Using a Wizard to Set Up Local Apps (p. 47)
Setting the Presence Status (p. 48)
Using Keyboard Shortcuts (p. 53)

3.3 Customising the Notifications

The notification settings allow you to specify which events you want to be notified about and in which way.

How to open the notification settings:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Click on **Notifications** in the left pane.

The settings can be found in the following sections:

- Desktop notifications (p. 42)
- Notification area (p. 42)
- Email (p. 42)
- Calendar (p. 42)
- Tasks (p. 43)
- Zoom (p. 43)
- Jitsi (p. 43)

Also see: Searching for Settings (p. 38)

Desktop notifications

- **Show desktop notifications**
  Defines whether you will receive a desktop notification about incoming email messages if the groupware is in the background.
- Depending on the browser settings, the **Manage browser permissions now** button is displayed. Click the button. You are asked by the browser whether the receipt of notifications should be allowed. Grant this permission.
- Depending on the configuration, a sound is played for new desktop notifications.

Notification area

- **Automatically open the notification area when there are new reminders**
  Defines whether the notification area automatically opens when receiving a reminder for an appointment or a task.
- **Show birthdays in notification area**
  Defines whether the notification area also includes upcoming birthdays.
- **show reminders for past appointments**
  Defines whether appointment reminders are displayed for past appointments.

See Using the Notification Area (p. 45)

Email

- **Play sound on incoming email**
  Defines whether a sound is played for incoming messages if the groupware is in the background.
  Note: Desktop notifications have to be allowed in the browser settings. See Desktop notifications (p. 42)
- **Sound**
  You can select between different sounds.

Calendar

- **Countdown**
  Defines whether a countdown window will be displayed for upcoming appointments. See Using Countdowns for Appointments (p. 44)
  Note: Depending on the configuration, this function might not be available.
- **Email notifications**
  Specifies whether you will receive an email notification, if the following is true:
  - **Appointment invitations, changes or deletions**
    An appointment in which you participate has been re-created, changed or deleted.
  - **Participants accept or decline your invitation**
    A participant accepted or declined an appointment organised by you.
  - **Participants accept or decline appointments**
    A participant accepted or declined an appointment in which you participate.
  - **Automatically delete the invitation email 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. See Responding to Appointment Invitations (p. 160)

Tasks

- **Email notifications**
  Specifies whether you will receive an email notification, if the following is true:
  - **Task invitations, changes or deletions**
    A task in which you participate has been re-created, changed or deleted.
  - **Participants accept or decline your invitation**
    A participant accepted or declined a task organised by you.
  - **Participants accept or decline tasks**
    A participant accepted or declined a task in which you participate.

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

- **Incoming calls**
  Defines how you will be informed if a Zoom call comes in.

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

- **Incoming calls**
  Defines how you will be informed if a Jitsi call comes in.

Related topics:

Searching for Settings (p. 38)
Using Countdowns for Appointments (p. 44)
Adjusting the General Settings (p. 39)
Using the Notification Area (p. 45)

3.4 Using Countdowns for Appointments

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

You can enable a countdown for upcoming appointments Prior to the appointment start, a visually striking countdown window will remind you of the appointment.

- The countdown window counts down in minutes to the appointment's start As soon as the appointment has started, the countdown window will show the current duration of the appointment.
  The countdown window will be displayed regardless of the app selected.
- If clicking on the countdown window, the appointment's detail view will be opened. If the appointment includes a meeting, a button for joining will be displayed.
  Appointments that are shown as free will be ignored by the countdown window.
- You can move, minimize or close the countdown window.
  If you close the countdown window prior to the appointment's start, the countdown window will be opened again at the appointment's start.

How to enable the countdown window:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Click on **Notifications** in the left pane.
   Click on **Calendar** in the right pane.
3. Enable **Show countdown**.
   You can also use the following settings:
   - Define whether the countdown should be applied to all appointments or to specific appointments only.
   - Define how many minutes before the appointment the countdown should start.

Related topics:

Searching for Settings (p. 38)
Adjusting the General Settings (p. 39)
Customising the Notifications (p. 41)

3.5 Using the Notification Area

You will be notified in the notification area for the following events:

- Reminders for upcoming appointments or tasks
- Invitations for new appointments and tasks
- Reminders for overdue tasks
- Reminders for upcoming birthdays

How to use the notification area:

1. To open the notification area, click the **Notifications** icon in the menu bar.
   If there are new notifications, the icon will be marked with a red dot.
2. If there are reminders, you can use the following functions:
   - To show details in a pop-up, click on the reminder.
   - To edit the appointment or task, use the functions in the pop-up.
   - To receive a reminder again, click the **More options** icon ··· next to the reminder. Select a value in **Remind me again**.
     The reminder will be removed from the notification area and displayed again at the specified time.
   - To delete a reminder, click the **Delete** icon × next to the reminder.

   If there are reminders, you can use the following functions:
   - To show details in a pop-up, click on the invitation.
   - To display appointment invitation suggestions in the calendar, click on the date.
   - To accept or decline an invitation, click on the respective button.

   When receiving booking requests for managed resources, you can use the following functions:
   - To view the booking request in the resource calendar, click on the date.
   - To accept or decline the booking request, click on the respective button.

   Note: Depending on the configuration, managed resources might not be available.
   If there are overdue tasks, you can use the following functions:
   - To show details in a pop-up, click on the reminder.
   - To edit the task, use the functions in the pop-up.
3. To close the the notification area, click the **Notifications** icon in the menu bar.

User interface:

The notification area (p. 33)

Related topics:

Customising the Notifications (p. 41)

3.6 Changing Personal Contact Data

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

The following options are available:

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

Note: Depending on the configuration, attachments will be checked for viruses before being downloaded.

How to change your personal contact data:

1. Click the **My account** icon in the menu bar. Click on **Edit personal data**.
2. Change the data. Click on **Save**.

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

How to create a contact picture:

1. Click the **My account** icon in the menu bar. Click on **Edit personal data**.
2. Click on the empty contact picture. The *Change contact picture* window opens.
   - You can upload an existing image or take a new picture with the device camera.
   - You can adjust the image section with the zoom and by moving or rotating the photo.
3. Click on **Save**. The photo will be inserted.
   In order to edit the photo, click on it.

User interface:

The menu bar (p. 23)
The editing window (p. 34)
User data widget (p. 59)

Related topics:

Adjusting the General Settings (p. 39)
Address Book Settings (p. 227)

3.7 Using a Wizard to Set Up Local Apps

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

- Installing and configuring apps and clients on devices such as computers, tablets and smartphones. The supported devices are: Windows, Apple and Android.
- Installing the local Drive app for computers and mobile devices. This app is downloaded and installed from the respective the app store for the device. The local Drive apps synchronise your Drive app data with your computer or mobile device.

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

How to use the wizard:

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

User interface:

The menu bar (p. 23)

Related topics:

Adjusting the General Settings (p. 39)

3.8 Setting the Presence Status

You can set your current presence status to indicate your availability for a call to other users.

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

How to set the current presence status:

1. Click the **My account** icon in the menu bar.
2. Select a presence status below **Availability**. The following options are available:
   - **Online**. You are signed in and can be contacted.
   - **Absent**. You are currently absent and cannot be contacted.
   - **Busy**. You do not want to be disturbed, e.g. if you are in a meeting.
   - **Invisible**. You are not signed in.

   Your presence status is visible to other users wherever your user data are displayed:
   - as an E-Mail's sender or recipient
   - in the address book list view, in the address book detail view
   - as appointment participant, as task participant

Related topics:

Calling the Sender or Another Recipient (p. 96)
Calling Appointment Participants (p. 164)
Creating an audio/video conference in the editing window (p. 150)
Calling Contacts (p. 214)
Adjusting the General Settings (p. 39)

4 Keyboard Input

Learn how to operate the groupware using the keyboard.

There are two different options for keyboard operation:

- Using the Keyboard Navigation (p. 50)
  To execute a function, use the keyboard to navigate to the respective control element of the user interface.
- Using Keyboard Shortcuts (p. 53)
  To execute a function, press a defined key or key combination.

4.1 Using the Keyboard Navigation

With defined keys, you sequentially navigate through the control elements, e.g. with [Tab] or the arrow keys. Once the desired control element is reached, press [Enter] to execute this function.

Content

- Key combinations and their functions (p. 50)
- Functions and the associated key combinations. (p. 51)
- Examples of use for keyboard navigation (p. 52)

Related topics:

Using Keyboard Shortcuts (p. 53)

4.1.1 Key combinations and their functions

The following keys and key combinations are defined for keyboard navigation. Depending on the system, additional key combinations might be preset, whereas those key combinations are not officially supported.

[Ctrl]+[F6] on Windows and Linux systems, [F6] on MacOS systems	Switches between menu bar, folder view, list view 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 view. Selects a function in the tool bar.
Arrow up or down	Selects an app in the app launcher. Selects elements in the folder view, the list view or the display area. Moves the cursor within the calendar views or the date picker. Opens or closes a folder in the folder view. Selects a menu entry.
Arrow down	Opens a menu.
[Page up], [page down]	Browses one page up or down in the folder view or the list view. Browses the calendar view or the date picker, depending on the time range displayed.
[Tab] or [Shift]+[Tab]	Switches to the next or previous executable item, e.g. a function, an input field or a checkbox.
[Enter]	Executes the selected function.
[Space]	Enables or disables the selected checkbox.
[Esc]	Closes an open menu. Closes a pop-up. Cancels a window.
[Del], [Backspace]	Deletes the selected object.
[Ctrl]+[a]	Selects all objects in the list view.

4.1.2 Functions and the associated key combinations.

The following functions can be called using keyboard navigation.

Switch between menu bar, folder view, list view and display area	[Ctrl]+[F6] on Windows and Linux machines. [F6] on MacOS machines.
Select an app in the app launcher	[Arrow down] or [Arrow up]
Select a function, an input field or a checkbox.	[Tab] [Shift]+[Tab]
execute the function selected	[Enter]
Enable or disable a selected checkbox	[Space]
Switch between selection fields	Arrow keys
move the cursor in input fields	arrow keys, [Home], [End].
Browses one page up or down in the folder view or the list view.	[Page up], [page down]
open or close a folder in the folder view	Arrow left or right
select elements in the folder view, the tool bar, the side bar or the display area	Arrow keys
Close a pop-up or cancel a window	[Esc]
Delete selected email messages, folders or files	[Del] or [Backspace]
Select all elements in a list view	[Ctrl]+[a]

4.1.3 Examples of use for keyboard navigation

These instructions show how to execute the following actions using the keyboard navigation:

- How to send a new email using the keyboard
- How to reply to an email using the keyboard

How to send a new email using keyboard navigation:

1. If you are working in an app other than the email app, do the following:

   Repeatedly press [Tab] or [Shift]+[Tab] until the [Email] icon is highlighted in the menu bar. Press [Enter].

   The email app will be launched.
2. Repeatedly press [Tab] until the **New email** button is highlighted. Press [Enter]. The *Compose* window opens. The input field **To:** is enabled.
3. Enter the recipient's email address. Press [Enter].

   If required, repeat these steps to add additional recipients.
4. Repeatedly press [Tab] until the **Subject** input field is highlighted. Enter the subject. Press [Enter]. The input field for the email text is enabled.
5. Enter the email text.
6. In order to send the email, press [Tab]. The **Send** button is highlighted. Press [Enter]. The email is sent.

   To add attachments, do the following:

   Press [Tab]. The first icon in the button bar will be highlighted.

   Use the arrow keys to navigate to the **Add local file** icon Press [Enter].

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

   Press [Shift]+[Tab] to highlight the **Send** button. Press [Enter]. The email is sent.

How to reply to an email using keyboard navigation:

1. If you are working in an app other than the email app, do the following:

   Repeatedly press [Tab] or [Shift]+[Tab] until the [Email] icon is highlighted in the menu bar. Press [Enter].

   The email app will be launched.
2. Repeatedly press [Tab] or [Ctrl]+[F6] or [F6] on Mac OS systems until the name of the email account is highlighted in the folder view. Use the cursor keys to select the desired folder. To view or hide subfolders, use [Right arrow] or [Left arrow].
3. If the desired folder is highlighted, press [Enter]. The first email in the folder will be highlighted in the list view.
4. Use the cursor keys to select the desired email.
5. Press [Tab]. The first icon in the tool bar will be highlighted.

   Use the arrow keys to navigate to the **Reply** icon. Press [Enter]. The window for replying to the email opens. The input field for the email text is enabled.
6. Enter your reply.

   Press [Tab]. The **Send** button is highlighted. Press [Enter]. The email is sent.

4.2 Using Keyboard Shortcuts

You use keyboard shortcuts by pressing a specific key or by pressing a combination of several keys simultaneously or consecutively. The respective functions will be executed immediately.

Content

- Configuring keyboard shortcuts (p. 54)
- Calling functions with keyboard shortcuts (p. 55)

Related topics:

Using the Keyboard Navigation (p. 50)

4.2.1 Configuring keyboard shortcuts

You can configure the keyboard shortcuts by selecting a profile or disabling the keyboard shortcuts.

How to configure keyboard shortcuts:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Click on **Basic** in the left pane.
   Click on **Keyboard shortcuts**.
3. Select a setting in **Shortcut profile**.
   The keyboard shortcuts associated with this profile, will be displayed.
   To disable the keyboard shortcuts, select **Disable keyboard shortcuts**.

4.2.2 Calling functions with keyboard shortcuts

The following tables show which keyboard shortcuts can be used, depending on the profile.

General keyboard shortcuts

	App Suite	Gmail	Outlook
Show shortcut help	?	?	?
Focus search	/	/	/
Activate next floating window	[Ctrl]+[.]	/	/

Formatting email messages

	App Suite	Gmail	Outlook
Bold	[Ctrl]+[b]	[Ctrl]+[b]	[Ctrl]+[b]
Italic	[Ctrl]+[i]	[Ctrl]+[i]	[Ctrl]+[i]
Underline	[Ctrl]+[u]	[Ctrl]+[u]	[Ctrl]+[u]
Insert link	[Ctrl]+[k]	[Ctrl]+[k]	[Ctrl]+[k]

Launch apps

	App Suite	Gmail	Outlook
E-Mail	[Ctrl]+[Alt]+[m]	[g] [m]	[Ctrl]+[Alt]+[m]
Calendar	[Ctrl]+[Alt]+[c]	[g] [a]	[Ctrl]+[Alt]+[c]
Address Book	[Ctrl]+[Alt]+[a]	[g] [c]	[Ctrl]+[Alt]+[a]
Tasks	[Ctrl]+[Alt]+[t]	[g] [t]	[Ctrl]+[Alt]+[t]
Drive	[Ctrl]+[Alt]+[d]	[g] [d]	[Ctrl]+[Alt]+[d]
Portal	[Ctrl]+[Alt]+[p]	[g] [p]	[Ctrl]+[Alt]+[p]
Settings	[Ctrl]+[Alt]+[s]	[g] [s]	[Ctrl]+[Alt]+[s]

E-Mail

	App Suite	Gmail	Outlook
Send new email	[c]	[c]	[n]
Open the Inbox folder	[g] [i]	[g] [i]	[g] [i]
Open the Sent folder	[g] [t]	[g] [t]	[g] [t]
Open the Drafts folder	[g] [d]	[g] [d]	[g] [d]
Archive email	[a]	[e]	[e]
Reply to email	[r]	[r]	[r]
Reply to all recipients	[Shift]+[r]	[a]	[Shift]+[r]
Forwarding email messages	[f]	[r]	[Ctrl]+[f]
Mark email as read	[i]	[Shift]+[i]	[q]
Mark email as spam	[q]	[q]	[j]

	App Suite	Gmail	Outlook
Mark email as not spam	[p]	[p]	[p]

Calendar

	App Suite	Gmail	Outlook
New appointment	[c]	[c]	[n]
Save appointment	[Ctrl]+[Enter]	[Ctrl]+[Enter]	[Ctrl]+[Enter]
Calendar view Day	[d]	[d]	[Shift]+[Alt]+[1]
Calendar view Week	[w]	[w]	[Shift]+[Alt]+[3]
Calendar view Month	[m]	[m]	[Shift]+[Alt]+[4]
Calendar view Year	[y]	[y]	[Shift]+[Alt]+[5]
List view	[l]	[l]	[Shift]+[Alt]+[6]
Time period forward	[n]	[n]	[Shift]+[Right arrow]
Time period back	[p]	[p]	[Shift]+[Left arrow]
Today	[t]	[t]	[Shift]+[Alt]+[y]

Address Book

	App Suite	Gmail	Outlook
New contact	[c]	[c]	[n]
Save contact	[Ctrl]+[Enter]	[Ctrl]+[Enter]	[Ctrl]+[Enter]

Tasks

	App Suite	Gmail	Outlook
New task	[c]	[c]	[n]
Save task	[Ctrl]+[Enter]	[Ctrl]+[Enter]	[Ctrl]+[Enter]

5 Portal

Learn how to use the Portal app as central information source for new email messages, scheduled appointments or tasks and news from social networks.

How to start the Portal app:

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

Topics:

- The Portal Components (p. 58)
- Customising the Portal (p. 61)
- Portal Settings (p. 64)

5.1 The Portal Components

Learn about the components of the Portal app user interface and how to use them:

- Signed in as (p. 59)
- Add widget button (p. 59)
- Appointments widget (p. 59)
- Inbox widget (p. 59)
- Tasks widget (p. 59)
- Recently changed files widget (p. 59)
- User data widget (p. 59)
- Quota widget (p. 59)
- News widgets (p. 59)
- Widgets with news from your social networks (p. 60)
- Widgets with information about Drive apps (p. 60)

Depending on the configuration, the portal components can differ from the display described.

5.1.1 Signed in as

Displays the username that you used for signing in.

5.1.2 Add widget button

If clicking on this button, a menu will be opened that allows you to add new widgets.

Related topics:

Adding Portal widgets (p. 62)

5.1.3 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.
- To edit the appointment, click on the respective button in the pop-up.
- If clicking on a participant, an additional pop-up opens.

5.1.4 Inbox widget

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

- If clicking on an E-Mail, a pop-up opens. The pop-up displays the E-Mail's contents.
- To edit the email, click on the respective button in the pop-up.

5.1.5 Tasks widget

Shows unfinished tasks. You can do the following:

- If clicking on a task, a pop-up opens. The pop-up shows the task data.
- To edit the task, click on the respective button in the pop-up.

5.1.6 Recently changed files widget

Displays new or changed files.

5.1.7 User data widget

Includes links for the following functions:

- Changing your personal contact data
- Changing your password

Related topics:

Changing Personal Contact Data (p. 46)
Changing the Password (p. 21)

5.1.8 Quota widget

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

5.1.9 News widgets

Display current messages from different message sources:

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

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

5.1.10 Widgets with news from your social networks

Show current information from your social networks.

- The most recent messages from a social network are displayed in a widget.
- 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 in time.

5.1.11 Widgets with information about Drive apps

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

5.2 Customising the Portal

Learn how to set the widgets that are to be displayed on the portal.

- Changing the widgets' order (p. 62)
- Removing Portal widgets (p. 62)
- Adding Portal widgets (p. 62)
- Adding a Portal widget for social networks (p. 63)
- Creating a XING account (p. 63)

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

5.2.1 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.

Related topics:

Removing Portal widgets (p. 62)
Adding Portal widgets (p. 62)
Adding a Portal widget for social networks (p. 63)
Portal Settings (p. 64)

5.2.2 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.

Related topics:

Adding Portal widgets (p. 62)
Changing the widgets' order (p. 62)
Adding a Portal widget for social networks (p. 63)
Portal Settings (p. 64)

5.2.3 Adding Portal widgets

You can extend the existing widgets by adding new ones.

How to add new widgets:

1. Use one of the following methods:
   - Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
     The *Settings* window opens.
     Click on **Portal** in the left pane. Click on **Add widget**. Select an entry.
   - Click on **Add widget** on the upper right side of the Portal app. Select an entry.
2. Some widgets require additional data. Enter the required values.

User interface:

Add widget button (p. 59)

Related topics:

Removing Portal widgets (p. 62)
Changing the widgets' order (p. 62)
Adding a Portal widget for social networks (p. 63)
Portal Settings (p. 64)
Adding an email to the portal (p. 105)
Adding files to the portal (p. 276)

5.2.4 Adding a Portal widget for social networks

In order to access information and functions of your social networks, you can add widgets for social networks.

How to add a widget for accessing social networks:

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

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

Related topics:

Changing the widgets' order (p. 62)
Removing Portal widgets (p. 62)
Adding Portal widgets (p. 62)
Creating a XING account (p. 63)
Portal Settings (p. 64)
Viewing, editing, deleting accounts (p. 311)

5.2.5 Creating a XING account

If you do not have an Xing account yet, you can use a widget to create a new Xing account.

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

1. Click on **Add widget** on the upper right side of the Portal app. 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 **Create**.

Related topics:

Changing the widgets' order (p. 62)
Removing Portal widgets (p. 62)
Adding Portal widgets (p. 62)
Adding a Portal widget for social networks (p. 63)
Portal Settings (p. 64)
Viewing, editing, deleting accounts (p. 311)

5.3 Portal Settings

How to use the Portal settings:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Click on **Portal** in the left pane.

The settings can be found in the following sections:

- Portal widgets (p. 65)
- Advanced settings (p. 65)

Also see: Searching for Settings (p. 38)

Portal widgets

- **Add widget**

  Opens a menu for adding widgets.

- **Functions for editing widgets**
  - **Move icon** ⁞
    Changes the widget order.
  - **Edit**
    Allows editing a widget's settings, e.g. the URL or description.
    Note: This button is only available for certain widgets.
  - **Disable**
    Removes a widget from the Portal. To display the widget again, click on the **Enable** button.
  - **Delete icon** ×
    This icon deletes a widget from the portal and from the list of widgets on the settings page.
    Warning: If you delete a widget, all settings for this widget will be lost.

Advanced settings

- **Reduce to widget summary on smartphones**

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

Related topics:

Changing the widgets' order (p. 62)
Removing Portal widgets (p. 62)
Adding Portal widgets (p. 62)
Adding a Portal widget for social networks (p. 63)

6 E-Mail

Learn how to read, send and organise your email message in the E-Mail app.

How to start the E-Mail app:

Click the **All Applications** icon ≡ in the menu bar. Click on **E-Mail** in the App Launcher.

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

Topics:

- The E-Mail Components (p. 68)
- Viewing Email Messages (p. 77)
- Viewing or Saving email Attachments (p. 78)
- Sending Email Messages (p. 79)
- Additional Functions for Sending Email Messages (p. 85)
- Using the AI Integration (p. 93)
- Calling the Sender or Another Recipient (p. 96)
- Adding E-Mail Folders (p. 97)
- Managing E-Mail messages (p. 98)
- Deleting or Recovering Email Messages (p. 108)
- Using E-Mail Filters (p. 114)
- Searching for E-Mail Messages (p. 120)
- Sending or Receiving Email Messages as Deputy (p. 122)
- Adding E-Mail Accounts (p. 123)
- Email Settings (p. 124)

6.1 The E-Mail Components

Learn about the components of the E-Mail app user interface and how to use them:

- The E-Mail settings menu (p. 69)
- The New email button (p. 69)
- The E-Mail folder view (p. 70)
- The E-Mail tool bar (p. 71)
- The inbox categories bar (p. 72)
- The E-Mail list view (p. 72)
- The E-Mail detail view (p. 73)
- The E-Mail pop-up (p. 74)
- The email editing window (p. 75)

6.1.1 The E-Mail settings menu

The **Settings** icon ⚙ in the menu bar opens a menu with the following functions:

- Adjust all settings
- Select a theme for the user interface
- **Layout**. Defines the layout of the list view and the detail view in the display area.
- **List options**. Defines whether contact images, checkboxes or none of these elements will be displayed in the list view.
- Depending on the configuration: **Browse categories**. Shows all items that have been tagged with a specific category.
- **Add email account**. Opens a window for adding additional email accounts.
- **All attachments**. Shows all E-Mail attachments that you have sent or received, in the Drive app.
- Depending on the configuration: **Connect your Device**. Launches a wizard for setting up local apps with which you can access your groupware data.
- **Inbox tabs**. Opens the window for configuring the inbox tabs bar.
- **Vacation notice**. Opens the window for activating and configuring a vacation notice.
- **Statistics**. Shows current statistics for your inbox: the most frequent senders, numbers of email messages per week day, numbers of email messages per hour

General description of the user interface:

The menu bar (p. 23)

Instructions:

Email Settings (p. 124)
Browsing categories (p. 314)
Adding E-Mail Accounts (p. 123)
Viewing or Saving email Attachments (p. 78)
Displaying email attachments in Drive (p. 264)
Using a Wizard to Set Up Local Apps (p. 47)
Working with inbox categories (p. 99)
Sending a vacation notice automatically (p. 92)

6.1.2 The New email button

Creates a new email. If clicking the **More actions** icon ⌄, a menu with additional functions opens:

- Add email account
- Depending on the configuration: View all attachments
- New appointment, New contact, New task

Note: If the folder is closed, the button will be displayed as an icon. In this case, the **More actions** icon will not be available. To show the folder view, click the **Open folder view** icon ◫ on the bottom left side.

General description of the user interface:

The button for creating new objects (p. 26)

Instructions:

Sending Email Messages (p. 79)
Adding E-Mail Accounts (p. 123)
Viewing or Saving email Attachments (p. 78)

6.1.3 The E-Mail folder view

Displays the E-Mail folders.

If the folder view is closed, only some personal folders will be displayed as icons. Personal subfolders and other folders will not be displayed. To show the folder view, click the **Open folder view** icon ◫ on the bottom left side.

Content

- **Inbox**. By default, all incoming E-Mail messages go to this folder.
- **Drafts**. Contains the E-Mail messages saved as drafts.
- **Sent**. Contains the email messages sent by you.
- **Trash**. Contains the Email deleted by you.
- **Archive**. Contains the email messages archived by you. This folder will be created automatically when initially archiving an email.
- **My folders**. Contains the email folders created by you. This folder will be created automatically when initially creating an email folder.

Depending on the configuration and email settings, additional folders might be available.

- Folder for flagged messages
- Folder for unread messages
- Folder for messages that will be sent later
- Shared and public email folders you subscribed to.
- Folders from functional email accounts that have been assigned to you by the administrator.

General description of the user interface:

The folder view (p. 27)

Related topics:

Adding E-Mail Folders (p. 97)
Managing E-Mail messages (p. 98)
Disabling or enabling functional email accounts (p. 310)
Managing Data with Folders (p. 288)
Sharing Data (p. 294)

6.1.4 The E-Mail tool bar

Contains functions for replying to and organising email messages. Some functions will only be displayed if multiple email messages have been selected.

Content

- **Delete** icon 🗑. Deletes the email messages selected by you.
- **Archive** icon 🗃. Archives the email messages selected by you.
- Icons for **replying to** and **forwarding** the selected email messages:
- Depending on the configuration: **AI integration** icon . Opens a menu with AI functions for editing the email content.
- Depending on the configuration: **Set inbox category** icon 🗀. Opens a menu that allows you to move an email to an inbox category. This icon is only available if the inbox tabs bar is displayed.
- Depending on the configuration: **Set category** icon 🏷.. Opens a menu with functions for assigning a category or for managing categories.
- Depending on the configuration: **Set colour** icon 🔖. Opens a menu allowing you to assign a coloured label to the selected email messages.
- Depending on the configuration: **Flag** icon ☆. Flags the email.
- **Move** icon . Moves the selected email messages to another folder.
- **More actions** icon ···. Opens a menu with functions for managing email messages.

General description of the user interface:

The tool bar (p. 28)

Instructions:

Deleting E-Mail messages (p. 109)
Archiving E-Mail messages (p. 106)
Replying to email messages (p. 89)
Forwarding email messages (p. 90)
Using AI functions when replying to email messages (p. 94)
Working with inbox categories (p. 99)
Organising email messages with categories (p. 102)
Categorising E-Mail messages (p. 103)
Moving or copying E-Mail messages (p. 100)
Printing email messages (p. 106)
Saving email messages (p. 105)
Exporting email messages as PDF (p. 105)
Showing the email source (p. 103)
Creating E-Mail reminders (p. 104)
Adding an email to the portal (p. 105)

6.1.5 The inbox categories bar

Shows predefined inbox tabs for the email messages in the **Inbox** folder. This allows you to assign incoming email messages to certain tabs sorted by senders.

Notes:

- Depending on the configuration, inbox tabs might not be available.
- If inbox categories are available, you can show or hide the inbox categories bar. To do so, click the **Settings** icon ⚙ in the menu bar. Click on **Inbox categories**.
- The number of inbox tabs and their names and order are preset. Depending on the configuration, some inbox tabs can be renamed or disabled.

Instructions:

Working with inbox categories (p. 99)

6.1.6 The E-Mail list view

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

Content

- The name of the selected folder.
  The number of email messages in this folder.
- **More actions** icon ⋯. Opens a menu with functions for selecting, editing or sorting the selected folder's email messages.
- The following details are displayed for each email: Sender, subject, date of receipt. Unread E-Mail messages are marked with the **Unread** icon ●.
- A tooltip on a sender's name shows the sender's email address.
- If available, additional information is shown: attachment icons, coloured label or flag, number of email messages in a conversation [14], priority.
- If available, the assigned categories will be displayed. In the **Reading** section of the E-Mail settings, you can specify whether assigned categories are displayed in the list view.
  Note: Depending on the configuration, categories might not be available.
- Encrypted email messages are marked with the Encrypted icon 🔒.
- If a vacation notice is enabled, a notification will be displayed above the list view.
  If you close the notification, the vacation notice remains active.

To adjust the list view layout, the following options are available:

- Use the entries below **List options** in the **Settings** menu ⚙. Here you can define whether checkboxes for selecting email messages should be displayed.
- Use the entries in the **Reading** section of the email settings.

General description of the user interface:

The list view (p. 30)

Related topics:

Email Settings (p. 124)
Viewing Email Messages (p. 77)

6.1.7 The E-Mail detail view

Displays the content of the email that you selected in the list view. If double-clicking on the email in the list view, the data will be displayed in a window.

To display the detail view, click the **Settings** icon ⚙ in the menu bar. Enable one of the following settings: **Vertical**, **Horizontal**.

Content

- **Read** icon ○. Changes the status from Read to Unread and vice versa.
- A picture of the sender, if available.
- Sender
  If clicking on it, a pop-up opens. It displays information about the contact.
- Subject
- Recipient
  If clicking on it, a pop-up opens. It displays information about the contact.
- Date and time of the receipt.
- **Reply all** icon. Opens the email editing window for replying to the email.
- **Delete** icon. Moves the E-Mail to the Trash folder.
- Depending on the configuration, one of the following functions will be available:
  - **Set category** icon. Opens a menu with functions for assigning a category or for managing categories.
  - **Set colour** icon. Opens a menu, allowing you to assign a coloured label to the email.
  - **Flag** icon ☆. Flags the email.
- **More actions** icon ···. Opens a menu with additional functions for replying to, forwarding or organizing email messages.
- If the email contains external images, there will be buttons for displaying the external images, depending on the setting.
- If the E-Mail contains attachments, additional elements are displayed:
  - **Attachment** icon. If clicking on it, the attachments will be displayed as preview or list.
    If clicking the **Toggle preview** icon or ≔ the attachments will be shown as preview or as list.
  - Buttons that are used to apply a function to all E-Mail attachments at once.
- If selecting an email with an attachment as link in the **Sent** folder, information about the attachment will be displayed at the top of the email text.
- Depending on the configuration: If available, the assigned categories will be displayed.
- Email text
  Quotes from previous email messages are marked at the beginning of the line.
  If email messages are shown grouped by conversations, only the text of the last email will be displayed. You can open or close a single email in the Conversation [14] by clicking on a free area next to the sender.

General description of the user interface:

The detail view (p. 31)

Related topics:

Viewing Email Messages (p. 77)

6.1.8 The E-Mail pop-up

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

Content

- Icons for frequently used functions
  - If the contact is not yet saved in an address book, **Add to address book** will be displayed. If clicking on the button, the window for creating a new contact opens.
  - **Send e-mail**. Opens the window for sending a new E-Mail to the contact.
  - **Invite**. Opens the window for creating an appointment with this contact.
- **More actions** icon ⋯. Opens a menu with functions for managing contacts.
- The contact's **Halo View**:
  - the personal data of the contact
  - the history of your email conversation with this contact
  - the history of your appointments with this contact

General description of the user interface:

The pop-up (p. 32)

Related topics:

Displaying contacts in the halo view (p. 204)

6.1.9 The email editing window

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

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

- Click on **New email**.
- Select an email. Click the **More actions** icon ··· in the detail view. Select a reply or forward function.
- Select an email draft. Click the **Edit draft** icon or the **Edit copy** icon in the tool bar.

Content

- Addresses
  - **From**. Shows your sender address. If clicking on it, a menu with several functions opens:
    - Select another sender address
    - **Show names**. Defines whether the real name is displayed.
    - **Edit names**. Opens the window for editing the real name.
      Note: Depending on the configuration, this function might not be available.
  - **CC**, **BCC** button. Opens the **CC** or **BCC** input field.
  - **AW** button. Opens the **Reply to** input field.
    Your email reply will be sent to the email addresses entered in this input field.
  - **To** input field. Matching suggestions will be displayed during input. To accept a suggestion, click on it. To accept the first suggestion, press Enter.
    If clicking on **To**, **CC**, **BCC** or one of the **Select contacts** icons, a window for selecting contacts from an address book opens.
- E-Mail content
  - **Subject** input field. Enter your E-Mail's subject in this field.
  - If the E-Mail has attachments, the attachments will be displayed as preview or list.
  - Input field for the E-Mail text.
    To format the text or to add images, click the **Options** icon ··· in the button bar. Enable **HTML**. Enable the **Show tool bar** icon T in the button bar.
- **Send**. Sends the E-Mail to the entered recipients.
- **Send later**. Opens a menu that allows you to select when the email should be sent.
- Button bar
  - An icon for showing or hiding the formatting options.
  - **Add file** icon. Opens a menu with functions for adding attachments.
    - **Add local file**. Adds local files.
    - **Add from Drive**. Adds files that are saved in the Drive app.
    - **Attachments from selected email**. Adds the attachments of the email selected in the list view.
  - Depending on the configuration: **Enable encryption** icon. Encrypts the email. A function bar will be displayed above the email text. If clicking on **Options**, a menu with encryption options opens:
  - **Insert template** icon. Opens a menu for adding or creating text templates.
  - **Options** icon ···. Opens a menu with additional functions:
    - add signature to E-Mail text, edit signature
    - set priority, add vCard, request read receipt
    - define the E-Mail's text format: plain text, HTML
    - save the E-Mail as draft and close the editing window

General description of the user interface:

The editing window (p. 34)

Related topics:

Sending Email Messages (p. 79)
Sending encrypted E-Mail messages (p. 332)

6.2 Viewing Email Messages

Learn how to select a specific email in a folder and display it in different ways in order to read it. An unread email will be marked as read by default as soon as selecting this email. You can change this behavior in the **Reading** section of the email settings.

How to display an email:

1. Open an E-Mail folder in the folder view.
   When having selected the **Inbox** folder and if you are using email tabs, you can select a tab.
   To display the number of email messages in a folder, hover over the folder name.
2. Click on an email in the list view. The content of the email will be displayed in the detail view.
   - If you enable the **Conversations** option in the **More options** menu ⋯ above the list view, all email messages in a conversation will be shown as a list.
     To open or close an email that is part of a conversation, click on a free area next to the sender.
   - If the email includes a quote from a previous email, you can display the quote by clicking the **Show quoted text** icon ⋯.

Options:

- In the **Reading** section of the E-Mail settings, you can specify how to display email messages.
- In the **External images in email messages** section of the security settings, you can define whether external images should be loaded.
  Depending on the setting, you can view external images by clicking on **Show images**.
  If you want external images to always be displayed in email messages from the sender of the current email, click on **Always show images from (this sender)**.
- To sort the E-Mail list, use the **More options** menu ⋯ above the list view.
  The sorting setting will be applied to the selected E-Mail folder. You can use different settings for the individual folders.
- To combine all email messages in a conversation in a single list entry in the list view, enable the **Conversations** checkbox in the **More options** menu ⋯.
- To select a layout or to change the list view layout, use the entries below **Layout** or **List options** in the **Settings** menu ⚙.
- You can open the email in a window by double-clicking on the email in the list view.
- When having selected the **List** layout in the **Settings**⚙, a list of all email messages in the folder will be shown in the display area. If clicking on an email, the email's detail view will be displayed.

Tip: In the **Email** section of the notification settings, you can define whether a notification sound is to be played for incoming email messages.

User interface:

The E-Mail list view (p. 72)
The E-Mail detail view (p. 73)

Related topics:

Viewing or Saving email Attachments (p. 78)
Showing the email source (p. 103)
Marking email messages as read or unread (p. 101)
Categorising E-Mail messages (p. 103)
Searching for E-Mail Messages (p. 120)

6.3 Viewing or Saving email Attachments

Depending on the configuration, the following functions are available:

- display attachments as preview or as a list
- display an attachment in the Viewer
- download attachments
- Depending on the configuration: save attachments in Drive
- edit an attached document, start an attached presentation
- view all attachments from sent or received E-Mail Messages in the Drive app

How to use the email attachment functions:

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

   To display the attachments click the **Attachment** icon above the email content in the detail view. The attachments will be displayed as preview or as a list.

   To toggle the view, click the **Toggle preview** icon or .
2. To apply a function to all attachments, click on a button next to the **Attachment** icon .
3. In order to apply a function to a specific attachment, enable the list view. Click on an attachment.

   To display an attachment in the Viewer, enable the preview view. Click on an attachment.

Note: Depending on the configuration, attachments will be checked for viruses before being downloaded.

- If no virus is found, the attachments will be downloaded without any further notification.
- If a virus scan was not possible or a virus was found, a window with a respective warning opens. In this case you can cancel the download.

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

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

1. Click the **Settings** icon in the menu bar. Click on **All attachments**.

   You can also click the **More actions** icon in the **New email** button. Click on **All attachments**.

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

User interface:

The E-Mail detail view (p. 73)

Related topics:

Viewing Email Messages (p. 77)
Displaying email attachments in Drive (p. 264)

6.4 Sending Email Messages

Learn how to send a new email and about the options available for customising the email content.

How to send a new email:

1. Click on **New email**.
   If you work in another app and you do not want to leave that app, you can use the **More actions** icon in the button for creating objects.
2. Enter the recipients' E-Mail addresses in the **To** field.
   - Matching suggestions will be displayed during input. To accept a suggestion, click on it. To accept the first suggestion, press Enter.
   - To select contacts from an address book, click the **Select contact** icon on the right side of the input field.
3. To send a copy to other recipients, click on **CC** or **BCC** on the upper right side.
   - If the recipients are to see who gets a copy of the E-Mail, enter the recipients in the **CC** field.
   - If the recipients are not to see who gets a copy of the E-Mail, enter the recipients in the **BCC** field.
4. Enter a subject. Enter the E-Mail text.
5. Click on **Send**.

Tip:

Depending on the configuration, you can recall the sending of an email within a short time frame. To do so, click on **Undo** next to **Send** in the display area.
In the **Compose & Reply** section of the email settings, you can configure this behaviour.

Options:

- With drag and drop you can move the recipients between the fields **To**, **CC** and **BCC**.
- In the **Advanced settings** section of the email settings, you can determine that each outgoing email will also be sent as a blind copy to a specific email address.
- To format the E-Mail text or to enter images, use the formatting bar below the text.
  - If the formatting bar is not displayed, click the **Options** icon ··· in the button bar. Enable **HTML**. Enable the **Show tool bar** icon T in the button bar.
    In the **Compose & Reply** section of the email settings, you can define default values for the font style, size and colour.
  - To enter images at the current cursor position, drag one or several images from a file browser or from the desktop to the E-Mail text input field.
    To remove an image, use the context menu.
- You can use additional options by clicking the **Options** icon ··· in the button bar:
  - attach your signature
  - set the priority
  - attach your vCard
  - request a read receipt

User interface:

The email editing window (p. 75)

Subordinated actions:

Automatically Adding Contacts or Resources from an Address Book (p. 206)
Automatically Adding Contacts or Resources from the Address Directory (p. 207)
Selecting the sender address when sending (p. 81)
Specifying a reply address when sending (p. 81)
Adding attachments when sending (p. 81)
Adding attachments from existing email messages when sending (p. 83)
Sending attachments as link when sending (p. 84)

Related topics:

Additional Functions for Sending Email Messages (p. 85)
Using AI functions when composing email messages (p. 95)
Email Settings (p. 124)

6.4.1 Selecting the sender address when sending

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

How to select your sender address in the Email editing window:

1. Click on the sender address next to **From:** in the E-Mail editing window. A menu opens.
2. Select an email address.

   Note: Depending on the configuration, you might not be able to use email addresses from external email accounts.
3. In order to display the sender addresses without names, disable **Show names**.
4. Depending on the configuration, you can define the name to be displayed with your email addresses. To do so, proceed as follows:
   a. Click on **Edit name**. The *Edit real names* window opens. It displays the names that are preset in the **Your Accounts** section of the Accounts settings.
   b. Enable the checkbox of the name that you want to edit. Edit the name. Click on **Save**.

Superordinated action:

Sending Email Messages (p. 79)

Related topics:

Adding E-Mail Accounts (p. 123)

6.4.2 Specifying a reply address when sending

By default, when a recipient replies to your email, the reply is sent to the email account from which you sent the email. Alternatively, you can use the email editing window to specify the email addresses to which the reply to the sent email will be sent.

How to select a reply-to address in the email editing window:

1. In the email editing window, click on **Re** next to the sender address. The **Reply to** input field will be displayed.

   If you have specified preset reply addresses while editing your primary email account, the **Reply to** input field is automatically displayed. The input field includes the preset reply-to addresses.
2. In **Reply to**, enter the email addresses to which the reply to your email should be sent.
   - Matching suggestions will be displayed during input. To accept a suggestion, click on it. To accept the first suggestion, press Enter.
   - To select contacts from an address book, click the **Select contact** icon on the right side of the input field.

   If you set multiple email addresses, the reply will be sent to all email addresses entered.

Superordinated action:

Sending Email Messages (p. 79)

Related topics:

Editing the primary E-Mail account (p. 309)

6.4.3 Adding attachments when sending

Depending on the configuration, you can attach files that are saved on your computer or in the Drive app.

How to add attachments in the email editing window:

1. Select the files to be sent as attachments.
   - Click the **Attachments** icon in the button bar. In the menu, specify which files you want to add:
     - To send a local file as an attachment, click on **Add local file**.
       You can also drag one local file or several local files from a file browser or the desktop to the email editing window.
     - In order to use the current version of a file from the Drive app as an attachment, click on **Add from Drive**.
2. You can remove an attachment if required. To do so hover over an attachment. Click the **Remove attachment** icon ⊖.

Options:

- Depending on the configuration, attached images can be minimised if they exceed a specified number of pixels or a specified file size. To do so, select an entry next to **Image size** on the bottom right side of the attachments
  Note: Images can only be minimised directly after having been uploaded. If you open an E-Mail draft or re-load the E-Mail editing window, attached images can no longer be minimised.
- Depending on the configuration, attachments will not be sent when having reached a certain size limit. In this case, the attachment will be saved in the **E-Mail attachments** folder in the Drive app. The E-Mail includes a link to the attachment.

Superordinated action:

Sending Email Messages (p. 79)

Related topics:

Adding attachments from existing email messages when sending (p. 83)
Sending attachments as link when sending (p. 84)

6.4.4 Adding attachments from existing email messages when sending

Depending on the configuration, you can add attachments from existing email messages to a new email.

How to add existing attachments to a new email:

1. In the list view, select an email that contains attachments. Click on **New email**.
2. Click the **Attachments** icon 📎 in the button bar of the email editing window.
   Below **Files from selected email**, select the files you want to send as attachment.
   If you did not select an email in step 1, the attachments of the most recently received email are displayed below **Recent attachments**.
3. You can add additional existing attachments. To do so, select an email with attachments in the list view while the email editing window is open.
4. Fill in the details for sending the E-Mail.

You can also use one of the following options to add existing attachments:

- In the list view, select **New email with attachment** from an email's context menu.
- In the detail view, click the **More actions** icon ···. Select **New email with attachment**.

Superordinated action:

Sending Email Messages (p. 79)

Related topics:

Adding attachments when sending (p. 81)
Sending attachments as link when sending (p. 84)

6.4.5 Sending attachments as link when sending

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

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

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

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

Notes:

- Depending on the configuration, there might be a maximum file size for attachments that can be sent as a link.
- In the list view, the email will be marked with the icon in the **Sent** folder. When viewing the email, the following information is displayed at the top of the email 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.

Superordinated action:

Sending Email Messages (p. 79)

Related topics:

Adding attachments when sending (p. 81)
Adding attachments from existing email messages when sending (p. 83)

6.5 Additional Functions for Sending Email Messages

Learn what other functions are available to send an email or design the content of an email.

- Using templates (p. 86)
- Using signatures (p. 87)
- Sending email messages later (p. 88)
- Replying to email messages (p. 89)
- Forwarding email messages (p. 90)
- Automatically forwarding email messages (p. 91)
- Sending an E-Mail to appointment participants (p. 91)
- Sending a vacation notice automatically (p. 92)

Related topics:

Sending Email Messages (p. 79)

6.5.1 Using templates

Templates are text modules that you can write once and then insert into your email messages as often as you like. As a result, you only have to write frequently used phrases once. Templates, signatures and email drafts differ in the following ways:

- Templates can be inserted into an email multiple times at any place and can be edited.
- A signature will be inserted automatically at the email's beginning or end.
- An email draft is a complete email including recipients, attachments and the text which is either completed or a draft.

The following functions are available:

- create new template, edit existing templates
- delete a template
- insert a template into the email text

How to create or edit a template:

1. Click the **Settings** icon in the menu bar. Click on **All settings**. The *Settings* window opens.
   Click on **Email** in the left pane. Click on **Templates**.
   You can also click the **Insert template** icon in the email editing window. Click on **Edit templates**.
   The existing templates will be shown.
2. To add a new template, proceed as follows:
   a. Click on **Add new template**. The *Add template* window opens.
   b. Enter a title for the template.
      Enter the text for the template. You can use the formatting bar to format the text.
3. To edit an existing template, click on **Edit** next to the title.
   In order to delete an existing template, click the **Delete** icon × next to the title.

How to add a template to the email text in the email editing window:

1. Place the cursor at the position where you want to insert the template.
2. Click the **Insert template** icon in the button bar.
   The existing templates will be shown.
3. Select a template from the list.

Superordinated action:

Additional Functions for Sending Email Messages (p. 85)

Related topics:

Using signatures (p. 87)
Using E-Mail drafts (p. 104)

6.5.2 Using signatures

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

- create new signature, edit existing signatures
- set default signatures for an email account
- add a signature to the E-Mail text

How to create or edit a signature:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Mail** in the left pane.
   Click on **Signatures**. The existing signatures will be shown.
3. To add a new signature, proceed as follows:
   a. Click on **Add new signature**. The *Add signature* window opens.
   b. Enter a name for the signature. Enter the text for the signature.
      Define whether the signature is to be entered below or above the E-Mail text.
      Click on **Save**.
4. To assign a signature to an email account, proceed as follows:
   a. Click on **Set default signature**. The *Set default signature* window opens.
   b. In **Default signature for new email messages** and in **Default signature for replies or forwardings**, you can define a default signature for each email account.
      Click on **Save**.
5. To edit an existing signature, the following options are available:
   - In order to edit a signature's text, click on **Edit** next to the signature.
   - In order to delete a signature, click the **Delete** icon × next to the signature.

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

1. Click the **Options** icon ··· in the button bar.
2. Select a signature from the list.

Superordinated action:

Additional Functions for Sending Email Messages (p. 85)

Related topics:

Adding E-Mail Accounts (p. 123)
Using templates (p. 86)

6.5.3 Sending email messages later

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

Instead of sending an email immediately, you can specify a later point in time for sending the email.
- This email will be saved in a special email folder.
- As soon as the point in time has been reached, the email will be sent automatically.

The following functions are available:
- send email messages later
- change the time for sending the email
- cancel sending the email later

How to send an email later:

1. Click on **New email**.
   If you work in another app and you do not want to leave that app, you can use the **More actions** icon ⌄ in the button for creating objects.
2. Select one or more recipients.
3. Enter a subject. Enter the E-Mail text.
4. Click the **Send later** icon ⌄ next to **Send**. A menu opens.
   The following options are available:
   - Select one of the times suggested in the menu.
   - Click on **Select a date and time**. Select a time in the *Schedule send* window.

   Note: This function will only be available when sending the email from your primary email account. This function will not be available if you select a sender address in **From** that differs from your primary email account's sender address.

The email will be saved in the **Scheduled** folder. This folder will be created automatically the first time you use this function.

How to change the time at which the email is to be sent:

1. Open the email in the **Scheduled** folder.
2. Click the **Edit draft** icon in the tool bar. The email editing window opens.
3. Click the **Send later** icon ⌄ at the bottom. Change the time.

How to cancel sending the email later:

1. Open the email in the **Scheduled** folder.
2. Click on **Cancel send** above the email text.
   The email will be moved to the **Drafts** folder.

User interface:

The email editing window (p. 75)

Related topics:

Sending Email Messages (p. 79)

6.5.4 Replying to email messages

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

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

How to reply to an email:

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

   You can also use one of the following methods:

   - Use the **Reply to all recipients** icon or the **More actions** icon ⋯ in the detail view.
   - Use the context menu in the email list view.

   To send a new email to the sender and the other recipients, click the **More actions** icon ⋯ in the detail view. Click on **Send new email**.
3. Fill in the details for sending the E-Mail.

User interface:

The E-Mail tool bar (p. 71)
The E-Mail detail view (p. 73)
The email editing window (p. 75)

Related topics:

Sending Email Messages (p. 79)
Forwarding email messages (p. 90)
Sending a vacation notice automatically (p. 92)
Using AI functions when replying to email messages (p. 94)

6.5.5 Forwarding email messages

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

- The subject of the email will be entered as the subject of the forwarded email. The subject is preceded with the text "Fwd: ".
- The email text will be 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

If you forward multiple email messages, the selected email messages are sent as attachments in EML format.

How to forward an email:

1. Select one or several E-Mail messages.
2. Click the **Forward** icon ⇨ in the tool bar.
   You can also use one of the following methods:
   - Use the **More actions** icon ⋯ in the detail view.
   - Use the context menu in the email list view.
3. Select one or more recipients.
4. Fill in the details for sending the E-Mail.

User interface:

The email editing window (p. 75)

Related topics:

Sending Email Messages (p. 79)
Replying to email messages (p. 89)
Automatically forwarding email messages (p. 91)

6.5.6 Automatically forwarding email messages

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

How to automatically forward email messages:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Mail** in the left pane. Click on **Rules**.
   Click on **Auto Forward**. The *Auto forward* window opens.
3. Enable the **Auto forward** button.
4. Enter the email address to which you want to forward the messages.
   In order to keep a copy of the E-Mail, enable **Keep a copy of the message**.
   The auto forwarding will be entered as an email filter. If additional filter rules are to be applied after the auto forwarding, enable **Process subsequent rules**.

Related topics:

Forwarding email messages (p. 90)
Sending a vacation notice automatically (p. 92)
Using E-Mail Filters (p. 114)

6.5.7 Sending an E-Mail to appointment participants

How to send an E-Mail to all appointment participants:

1. Depending on the selected view, the following options are available in the Calendar:
   - In a calendar view, click on an appointment with multiple participants. Click the **More actions** icon ⋯ in the pop-up.
   - In the list view, select an appointment with multiple participants. Click the **More actions** icon ⋯ in the tool bar.

   Click on **Send mail to all participants**.
2. Fill in the details for sending the E-Mail.

User interface:

The Calendar pop-up (p. 137)
The Calendar tool bar (p. 134)

Related topics:

Sending Email Messages (p. 79)

6.5.8 Sending a vacation notice automatically

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

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

How to create and activate a vacation notice:

1. Click the **Settings** icon in the menu bar. Click on **Vacation notice**.

   You can also use the **Vacation notice** button in the **Rules** section of the email settings.

   The *Vacation notice* window opens.
2. Enable the **Vacation notice** button.
3. To define the time range for sending the vacation notice, enable **Send vacation notice during this time only**. Set the start and end date.

   Note: Depending on the configuration, this setting might not be available.
4. Enter a subject and a text for the vacation notice.
5. In order to display all options, click on **Show advanced options**.
   - You can specify an interval for sending a vacation notice if there are several E-Mail messages from the same sender.
   - You can specify the sender address to be used for sending the vacation notice.
   - The vacation notice will be sent if messages are reaching your primary E-Mail address. You can also activate a vacation notice if messages are reaching your other E-Mail addresses.

The vacation notice will be entered as an email filter. You can also edit the vacation notice in the **Rules** section of the email settings.

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

- In the **Rules** section of the email settings, the **Vacation notice** button includes an additional icon.
- In the E-Mail app, a notification will be displayed above the list view. If clicking on the notification, the *Vacation notice* window opens.

Related topics:

Automatically forwarding email messages (p. 91)
Using E-Mail Filters (p. 114)

6.6 Using the AI Integration

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

Learn how to use the AI integration to edit email content:

- edit the content of existing email messages, have text translated to another language or have text suggestions for replies created
- have text suggestions for new email messages created or translated to another language

Note: When using the AI integration, the content of the respective email will be sent to an OpenAI service.

- The first time you use an AI function, a dialogue box opens where you can agree to send this data. You can only use AI functions after having agreed to the data being sent.
- You can change your consent to send the data at any time. To do so, click on **Change consent** in the **AI integration** section of the email settings.

The following options are available:

- Using AI functions when replying to email messages (p. 94)
- Using AI functions when composing email messages (p. 95)

6.6.1 Using AI functions when replying to email messages

The following options are available:

- Have a summary or translation of an email created
- Have a reply to an email composed

How to have an email text summarised or translated:

1. Select an E-Mail.
2. In the tool bar, click the **AI integration** icon.
3. Use the following menu entries:
   - In order to summarise the text, click on **Summarise**.
   - In order to translate the text, click on **Translate to**.

After a short delay, the result will be displayed above the original text.

Note: The result will not be saved. The result will disappear if you select another email or click the **Close** icon × next to the header.

How to have a reply to an email text composed:

1. Select an E-Mail.
2. In the tool bar, click the **AI integration** icon.
3. Use the following menu entries:
   - To generate a response with default values, click on **Thanks** or **Later**. The *Generate response* window opens.
     After a short delay, the result will be displayed below *Generated response*.
     In **Action**, you can select another function. In **Options**, you can influence the wording style.
     To generate a new response, click on **Regenerate**.
   - To create a response using your own words and formulations, click on **Generate response**. The *Generate response* window opens.
     In **Your input**, enter words or formulations.
     Click on **Generate**.
     After a short delay, the result will be displayed below *Generated response*.
4. To transfer the response to the email editing window, click on **Use response**.

Related topics:

Using AI functions when composing email messages (p. 95)
Replying to email messages (p. 89)

6.6.2 Using AI functions when composing email messages

The following options are available:

- have text drafts created when composing new email messages
- have an existing text rephrased, replied to or translated to another language

How to have a text draft created:

1. Click on **New email**.
2. Click the **Write or rephrase text** icon in the tool bar of the email editing window. The *Generate contents* window opens.
3. In **Action**, define whether you want to have a text regenerated, rephrased or summarised. In **Options**, you can influence the wording style and length.
4. In **Your input**, enter words or formulations. Click on **Generate**.
   After a short delay, the result will be displayed below *Generated response*.
   To generate a new result, click on **Regenerate**.
5. To enter the text in the text editing window, click on **Use content**.

How to have an existing text modified or translated:

1. Click on **New email**.
2. Enter a text.
   Select the text that you want to edit using the AI function.
3. Click the **Write or rephrase text** icon in the tool bar of the email editing window.
   The text you selected in the previous step appears below **Your input**.
   Note: It will take a while before you can operate the window, as a default action is first executed automatically.
4. In **Action**, define whether you want to have the text transformed or translated or whether you want have a reaction to the text generated.
   Depending on the action selected, you can influence the style and length of the formulations in **Options**.
5. Click on **Regenerate**.
   After a short delay, the result will be displayed below *Generated response*.
   To generate a new result, click on **Regenerate**.
6. To enter the text in the text editing window, click on **Use content**.

User interface:

The email editing window (p. 75)

Related topics:

Using AI functions when replying to email messages (p. 94)
Sending Email Messages (p. 79)

6.7 Calling the Sender or Another Recipient

You can launch an audio or video conference with an email's sender or recipient by calling the sender or recipient.

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

Prerequisite: You have set up an account with an audio or video conference provider.

How to call an E-Mail's sender or recipient:

1. Select an E-Mail.
2. Click on the sender or on a recipient in the detail view. A pop-up opens.
   An icon below the name indicates the contact's presence status.
3. In the pop-up, click the **Call** icon. In the menu, click on an audio or video conference provider. The window for calling the contact opens. Click on **Call**.

User interface:

The E-Mail pop-up (p. 74)

Related topics:

Calling Appointment Participants (p. 164)
Creating an audio/video conference in the editing window (p. 150)
Calling Contacts (p. 214)
Setting the Presence Status (p. 48)

6.8 Adding E-Mail Folders

Learn how to create additional email folders below your primary email account.

With email folders you can organise your email messages, e.g. by separately saving email messages for customers or projects.

How to create a new E-Mail folder:

1. Select the **Inbox** folder in the folder view. Click the **Actions** icon ··· next to the folder name. Click on **Add new folder**.

   You can also select **My folders** or a subfolder in the folder view. Click the **Folder-specific actions** icon + or **Actions** ··· next to the folder name. Click on **Add new folder**.
2. Enter a name in the *Add new folder* window.
3. Click on **Add**.

User interface:

The E-Mail folder view (p. 70)

Related topics:

Moving or copying E-Mail messages (p. 100)
Managing E-Mail messages (p. 98)
Managing Data with Folders (p. 288)

6.9 Managing E-Mail messages

Learn how to organise your E-Mail Messages and about the E-Mail actions available:

- Working with inbox categories (p. 99)
- Moving or copying E-Mail messages (p. 100)
- Marking email messages as read or unread (p. 101)
- Collecting addresses (p. 101)
- Organising email messages with categories (p. 102)
- Categorising E-Mail messages (p. 103)
- Showing the email source (p. 103)
- Using E-Mail drafts (p. 104)
- Creating E-Mail reminders (p. 104)
- Adding an email to the portal (p. 105)
- Saving email messages (p. 105)
- Exporting email messages as PDF (p. 105)
- Importing email messages (p. 106)
- Printing email messages (p. 106)
- Archiving E-Mail messages (p. 106)
- Cleaning up E-Mail folders (p. 106)
- Using Unified Mail (p. 107)

Related topics:

Adding E-Mail Folders (p. 97)
Sending or Receiving Email Messages as Deputy (p. 122)

6.9.1 Working with inbox categories

Inbox tabs [15] allow you to save incoming email messages in the **Inbox** folder separated by senders. If clicking on an inbox category, only the email messages assigned to this inbox category will be shown in the display area. The following options are available:

- enable or disable inbox categories
- assign incoming email messages to an inbox category
- edit the inbox categories view

Note: The inbox categories described here can only be used for email messages. Depending on the configuration, you can use separate categories for email messages, appointments, contacts and tasks, see Organising email messages with categories (p. 102).

How to enable or disable the inbox tabs:

1. To enable the inbox tabs, click the **Settings** icon in the menu bar. Click on **Inbox categories**.

   You can also use the **Configure inbox categories** button in the **Reading** section of the email settings.

   The *Configure categories* window opens. It shows the available inbox categories. Click on **Enable categories**.

   Below the menu bar, the inbox categories bar will be displayed.
2. To disable the inbox tabs, click the **Settings** icon in the menu bar. Click on **Inbox categories**.

   The *Configure categories* window opens. Click on **Disable categories**.

How to assign incoming email messages to an inbox category:

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

   Email messages that have not been assigned to an inbox category yet, are displayed in the **General** tab.
2. Drag an email from the list view to a category in the inbox categories bar and drop it there.

   You can also select an email. Click the **Set category** icon in the tool bar. Select a tab from the menu.
3. In order to finish the process, do one of the following:
   - In order to only move the selected email to the tab, close the pop-up window.
   - In order to move all existing and future incoming email messages from this sender to the tab, click on **Move all messages**.

How to edit the inbox tabs view:

1. Click the **Settings** icon in the menu bar. Click on **Inbox categories**.
   You can also click the **Configure categories** icon ··· in the inbox categories bar.
   The *Configure categories* window opens.
2. To enable or disable an inbox category, enable or disable the respective checkbox.
   To rename an inbox category, edit the respective text.
   Note: Some categories cannot be edited.
   In order to hide the inbox categories bar, click on **Disable categories**.
3. Click on **Save**.

User interface:

The E-Mail settings menu (p. 69)
The inbox categories bar (p. 72)

Related topics:

Email Settings (p. 124)

6.9.2 Moving or copying E-Mail messages

The following options are available:

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

How to move or copy an E-Mail:

1. Select one or several E-Mail messages.
2. To move them, click the **Move** icon in the tool bar.
   To copy them, click the **More actions** icon ··· in the tool bar. Click on **Copy**.
   Or:
   - If you have selected a single email, use the **More actions** icon ··· in the detail view.
   - Use the context menu in the email list view.

   A window opens.
3. Select a folder. You can also create a new folder.

Tips:

- To move E-Mail Messages from a specific sender to a folder, you can create a new rule when moving E-Mail Messages.
- You can also move the selected objects by dragging the objects from the folder view to a folder.
- In order to move all email messages from a folder, click the **More options** icon ··· above the list view.

Related topics:

Adding E-Mail Folders (p. 97)
Creating a new rule when moving (p. 117)

6.9.3 Marking email messages as read or unread

Unread email messages are marked with the Unread icon ●. The following options are available:

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

Note: An unread email will be marked as read by default as soon as selecting this email. You can change this behavior in the **Reading** section of the email settings.

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

1. Select one or several E-Mail messages.
2. Click the **More actions** icon ··· in the tool bar. Select **Mark as unread** or **Mark as read**.
   Or:
   - For single email messages, click the **Mark as unread** icon ○ or the **Mark as read** icon ● in the detail view.
   - Use the context menu in the email list view.

To mark all email messages in a folder as read, select the folder. Click the **Actions** icon ··· next to the folder name or use the context menu.

Related topics:

Viewing Email Messages (p. 77)

6.9.4 Collecting addresses

The following options are available:

- Automatically collect new email addresses when sending or reading email messages by activating this function in the **Advanced settings** section of 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.
   Click on **Add to address book** in the pop-up.

Note: This function is only available for new contacts.

Related topics:

Email Settings (p. 124)
Adding Contacts (p. 208)

6.9.5 Organising email messages with categories

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

To organise email messages independently from folders, you can use categories.

- You can mark email messages with categories.
- You can view all email messages that have been marked with a specific category.

You can create, edit or delete your own categories, see Managing categories (p. 313).

Independently from categories, you can use inbox categories. With inbox categories, you can organise email messages related to senders, see Working with inbox categories (p. 99).

How to mark email messages with a category:

1. Select one or several E-Mail messages.
2. Click the **Set category** icon in the tool bar. Select a category.
   To remove a category from the email, click on the category.

How to display email messages that have been marked with a specific category:

1. Select an email that has been marked with a category.
2. Click on the category in the detail view.

Result:

- The list view shows all email messages that have been marked with this category.
- For each email, the folder containing the email will be displayed.
- To display the previous list, click the **Cancel search** icon × in the search field.

Options:

- You can also search for email messages with a specific category.
- To show all objects that have been marked with a specific category, you can browse the categories.

Related topics:

Managing categories (p. 313)
Browsing categories (p. 314)
Searching for E-Mail Messages (p. 120)
Organising appointments with categories (p. 173)
Organising contacts with categories (p. 221)
Organising tasks with categories (p. 247)

6.9.6 Categorising E-Mail messages

Depending on the configuration, you can use one of the following options to categorise email messages:

- a coloured label
- a flag

How to categorise an E-Mail:

1. Select one or several E-Mail messages.
2. Depending on the configuration, use one of the following methods:
   - Click the **Set colour** icon ⚐ in the tool bar. Select a colour.
     To remove a label, select **None**.
     If you have selected a single email, you can also use the **Assign colour** icon ⚐ in the detail view.
   - Click the **Flag** icon ☆ in the tool bar.
     To remove the flag, use one of the following methods:
     - Again click the icon in the tool bar or in the detail view.
     - Use the context menu in the email list view.

In order to sort the email messages by flags, click the **More options** icon ··· above the list view.

Depending on the configuration, marked email messages will also be shown in the **Flagged** folder in the folder tree.

Related topics:

Viewing Email Messages (p. 77)
Searching for E-Mail Messages (p. 120)

6.9.7 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 **More actions** icon ··· in the tool bar or in the detail view. Click on **View source**.
   You can also use the context menu in the email list view.

Related topics:

Viewing Email Messages (p. 77)
Using E-Mail Filters (p. 114)

6.9.8 Using E-Mail drafts

While composing an email, the email is automatically saved as an email draft in regular intervals. The following options are available:

- Edit or send an email draft.
- Edit or send a copy of an email draft.

The email draft will be deleted after it has been sent. To keep the email draft, you can edit and send a copy.

Note: If you use an external email account while composing an email, the email draft will be saved in the **Drafts** folder below your primary email account, not below the external email account.

How to use an E-Mail draft:

1. Select an E-Mail in the **Drafts** folder.
2. Click the **Edit draft** icon or the **Edit copy** icon in the tool bar.
   Edit the content.
3. You can finish editing the email or send the email:
   - In order to finish editing the email, click the **Close** icon × in the title bar. The *Save draft* window opens.
     In order to save your changes to the draft, click on **Save draft**.
     To discard your changes to the draft, click on **Delete draft**.
   - To finish editing and save your changes to the draft, click the **Options** icon ··· in the button bar. Click on **Save and close draft**.
   - To send the email, click on **Send**.

Related topics:

Sending Email Messages (p. 79)
Using templates (p. 86)

6.9.9 Creating E-Mail reminders

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

How to create an E-Mail reminder:

1. Select an E-Mail.
2. Click the **More actions** icon ··· in the tool bar or in the detail view. Click on **Reminder**.
   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.

Related topics:

Creating Tasks (p. 237)

6.9.10 Adding an email to the portal

You can add an email as a widget to the portal.

How to add an email to the portal:

1. Select an E-Mail.
2. Click the **More actions** icon ··· in the tool bar or in the detail view. Click on **Add to portal**.
   Note: When having selected an E-Mail conversation, this function is only available in the detail view, not in the tool bar.

Related topics:

Adding Portal widgets (p. 62)

6.9.11 Saving email messages

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

How to save an email:

1. Select one or several E-Mail messages.
2. Click the **More actions** icon ··· in the tool bar or in the detail view. Click on **Save as file**.
3. Fill in the details for saving the file.

Related topics:

Importing email messages (p. 106)
Exporting email messages as PDF (p. 105)
Downloading Personal Data (p. 315)

6.9.12 Exporting email messages as PDF

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

You can export an email and its attachments in docx format as PDF. As soon as the PDF file has been created, it will be saved in a Drive folder that can be defined by you. Depending on the data volume, the download can take a while. As soon as the process has been finished, you will receive a notification.

How to export email messages as PDF:

1. Select an E-Mail.
2. Click the **More actions** icon ··· in the tool bar or in the detail view. Click on **Save as PDF**.
3. Fill in the details for saving the file.

The PDF file will be saved in the Drive folder chosen. The subject of the email will be used as the file name.
You will be informed as soon as the process has been completed.

Related topics:

Saving email messages (p. 105)

6.9.13 Importing email messages

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

How to import an email:

1. Open the E-Mail folder to which you want to import the E-Mail.
2. Drag the EML file from a file browser or the desktop to the email list view.

Related topics:

Saving email messages (p. 105)

6.9.14 Printing email messages

You can print the content of an E-Mail or several E-Mail messages.

How to print an E-Mail's content:

1. Select one or several E-Mail messages.
2. Click the **More actions** icon ⋯ in the tool bar. Click on **Print**.
   Or:
   - If you have selected a single email, you can also use the **More actions** icon ⋯ in the detail view.
   - You can also use the context menu in the email list view.

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

Related topics:

Archiving E-Mail messages (p. 106)

6.9.15 Archiving E-Mail messages

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

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

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

1. Select an E-Mail folder in the folder view.
2. Click the **Actions** icon ⋯ next to the folder name. Click on **Archive old messages**.
3. In the *Archive messages* window click on **Archive**.

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 context menu in the email list view.

Related topics:

Printing email messages (p. 106)

6.9.16 Cleaning up E-Mail folders

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

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

How to clean up an E-Mail folder:

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

Related topics:

Deleting E-Mail messages (p. 109)

6.9.17 Using Unified Mail

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

- In addition to an email account's inbox, the **Unified Mail** folder shows a further view for the account's email messages. The email messages actually exist only once.
- Email messages in the Inbox's subfolders are not displayed in the **Unified Mail** folder.
- Email messages in the **Unified Mail** folder are marked with the email account's name in the list view.

To use Unified Mail, enable the function for one or several email accounts.

How to activate Unified Mail for an email account:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Accounts** in the left pane.
3. Click on **Edit** next to an email account.
   Enable **Use Unified Mail for this account**.

Related topics:

Viewing Email Messages (p. 77)
Adding E-Mail Accounts (p. 123)
Viewing, editing, deleting accounts (p. 311)

6.10 Deleting or Recovering Email Messages

Learn how to delete email messages and recover them in certain cases.

- Deleting E-Mail messages (p. 109)
- Recovering email messages (p. 111)
- Permanently deleting email messages (p. 112)
- Recovering permanently deleted email messages (p. 113)

6.10.1 Deleting E-Mail messages

The following options are available:

- You can define whether email messages are moved to the Trash or permanently removed when deleted.
  - Email messages that are moved to the trash can be recovered.
  - Permanently deleted email messages can be recovered within 14 days if **Recover deleted items** is available in the context menu of the trash. **Warning:** If this function is not available, permanently deleted email messages **cannot** be recovered.
- You can delete individual email messages or an entire conversation.
- You can delete all email messages in an email folder.

How to define whether email messages are moved to the trash or permanently removed when deleted:

1. Click the **Settings** icon in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Mail** in the left pane.
   Click on **Advanced Settings** in the right pane.
3. Define the behavior when deleting email messages:
   - If email messages are to be moved to the trash, disable **Permanently remove deleted email messages**.
   - If email messages are to be deleted permanently, enable **Permanently remove deleted email messages**.
     Warning: Depending on the configuration, permanently deleted email messages **cannot** be recovered.

How to delete individual email messages:

1. Select one or several E-Mail messages.
2. Click the **Delete** icon in the tool bar.
   Or:
   - Press the [Del] or [Backspace] key on the keyboard.
   - In an email's context menu, click on **Delete**.
   - If you have selected a single email, use the **Delete** icon in the detail view.

Result:

- If the setting **Permanently remove deleted email messages** is disabled:
  The email messages are moved to the Trash folder.
- If the setting **Permanently remove deleted email messages** is enabled:
  You will be asked if you want to delete the email messages permanently.

How to delete all email messages in a folder:

1. In the folder view, select the folder which E-Mail messages you want to delete.
2. Use one of the following methods:
   - Click the **Actions** icon ··· next to the folder name.
   - Click the **More actions** icon ··· above the list.

   Click on the **Delete all messages** button.

   Warning: If the setting **Permanently remove deleted email messages** is enabled, deleted email messages **cannot** be recovered, depending on the configuration.
3. Confirm that you want to delete the content of this folder.

Result:

- If the setting **Permanently remove deleted email messages** is disabled:
  The email messages are moved to the Trash folder.
- If the setting **Permanently remove deleted email messages** is enabled:
  The email messages will be permanently deleted.

Related topics:

Recovering email messages (p. 111)
Permanently deleting email messages (p. 112)
Recovering permanently deleted email messages (p. 113)
Cleaning up E-Mail folders (p. 106)

6.10.2 Recovering email messages

The following options are available:

- Recover individual email messages from the trash.
- Recover all email messages from the trash.

How to recover individual email messages from the trash:

1. Open the **Trash** folder in the folder view.
2. Select one or several E-Mail messages.
   In an email's context menu, click on **Move**.
3. Select a folder in the *Move* window. Click on **Move**.

Or:

- Use drag and drop to move the email messages from the trash to a folder in the folder view.
- If you have selected a single email, use the **More actions** icon ··· in the detail view. Click on **Move**.

How to recover all email messages from the trash:

1. Select the **Trash** folder in the folder view.
2. Use one of the following methods:
   - Click the **More actions** icon ··· next to **Trash**.
   - Click the **More actions** icon ··· above the list.

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

Related topics:

Deleting E-Mail messages (p. 109)
Permanently deleting email messages (p. 112)
Recovering permanently deleted email messages (p. 113)
Cleaning up E-Mail folders (p. 106)

6.10.3 Permanently deleting email messages

The following options are available:

- Permanently delete individual email messages from the trash.
- Permanently delete all email messages from the trash by emptying the trash.

Permanently deleted email messages can be recovered within 14 days if **Recover deleted items** is available in the context menu of the trash. **Warning:** If this function is not available, permanently deleted email messages **cannot** be recovered.

How to permanently delete individual email messages:

1. Open the **Trash** folder in the folder view.
2. Select one or several E-Mail messages.
3. Click the **Delete** icon in the tool bar.
   If you have selected a single email, you can also use the **Delete** icon in the detail view.
4. Confirm that you want to permanently delete the selected email messages.

How to permanently delete all email messages from the trash:

1. Select the **Trash** folder in the folder view.
2. Use one of the following methods:
   - Click the **More actions** icon ⋯ next to **Trash**.
   - Click the **More actions** icon ⋯ above the list.

   Click on **Empty folder**.
3. Confirm that you want to delete the content of the folder.

Related topics:

Deleting E-Mail messages (p. 109)
Recovering email messages (p. 111)
Recovering permanently deleted email messages (p. 113)
Cleaning up E-Mail folders (p. 106)

6.10.4 Recovering permanently deleted email messages

Permanently deleted email messages can be recovered within 14 days if **Recover deleted items** is available in the context menu of the trash. If this function is not available, permanently deleted email messages are irrevocably lost.

How to recover permanently deleted email messages:

1. Select the **Trash** folder in the folder view.
2. Click the **More actions** icon ⋯ next to **Trash**.
   Click on **Recover deleted items**.
3. Select the email messages to be recovered in the *Recover deleted items* window.
   Click on **Move selected items**.
4. In the *Move* window, specify the folder that should contain the recovered email messages.
   Click on **Move**.

Related topics:

Deleting E-Mail messages (p. 109)
Recovering email messages (p. 111)
Permanently deleting email messages (p. 112)
Cleaning up E-Mail folders (p. 106)

6.11 Using E-Mail Filters

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

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

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

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

The following options are available:

- Creating new rules (p. 115)
- Adding a condition (p. 116)
- Adding an action (p. 117)
- Creating a new rule when moving (p. 117)
- Creating new rules for the subject and the sender (p. 118)
- Changing a rule (p. 118)
- Applying a rule to existing E-Mail messages (p. 119)

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

Related topics:

Email Settings (p. 124)
Automatically forwarding email messages (p. 91)
Sending a vacation notice automatically (p. 92)
Showing the email source (p. 103)

6.11.1 Creating new rules

A rule contains:

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

How to create a new rule:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Mail** in the left pane. Click on **Rules**.
3. Click on **Add new rule**.
   In the *Create new rule* window, execute the following actions:
   - Enter a rule name.
   - Click on **Add condition**. Make a selection from the drop-down menu. Complete the condition details.
   - Click on **Add action**. Select an action from the menu. Complete the action details.
4. You can set whether subsequent rules are to be processed if the rule is met. To do so, enable or disable **Process subsequent rules**.
5. To complete the creation, you can do the following:
   - To apply the rule to future incoming E-Mail messages, click on **Save**.
   - To apply the new rule to future incoming E-Mail messages and to existing E-Mail messages, click on **Save and apply**. Select the folder containing the E-Mail messages to which the rule should be applied.
     Note: Some actions cannot be executed if applying a rule to existing E-Mail messages.

Subordinated actions:

Adding a condition (p. 116)
Adding an action (p. 117)

Related topics:

Creating a new rule when moving (p. 117)
Creating new rules for the subject and the sender (p. 118)
Changing a rule (p. 118)
Applying a rule to existing E-Mail messages (p. 119)

6.11.2 Adding a condition

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

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

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

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

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

Example: The following details are used for the condition:

- Email part "Subject"
- Criterion "Is exactly"
- Argument "minutes"

In this case it would be verified whether the subject of an email exactly matches the argument "minutes". Further examples of how to filter email messages using the subject:

- Criterion: "contains"
  The condition is met if the subject contains the characters in the argument.
  Example: The argument is "minutes".
  - The condition is met for the subject "minutes".
  - The condition is also met for the subject "meeting minutes".
- Criterion: "matches"
  The condition is met if the subject exactly matches the characters in the argument. The character string can contain wildcards.
  Example: The argument is "minutes*". The "*" character is a wildcard for any characters.
  - The condition is met for the subject "minutes from yesterday’s meeting".
  - 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 "organization".
  - The condition is also met for the subject "organisation".
  - The condition is not met for the subject "Organic".

Superordinated action:

Creating new rules (p. 115)
Encrypting incoming E-Mail messages by using a filter rule (p. 333)

Related topics:

Adding an action (p. 117)

6.11.3 Adding an action

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

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

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

Superordinated action:

Creating new rules (p. 115)
Encrypting incoming E-Mail messages by using a filter rule (p. 333)

Related topics:

Adding a condition (p. 116)

6.11.4 Creating a new rule when moving

You can create a new rule when moving an E-Mail to another folder. Incoming E-Mail Messages from this sender will then be moved to this folder automatically.

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

1. Select an E-Mail.
2. Click the **More actions** icon ⋯ in the detail view. Click on **Move**.
   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.

Related topics:

Creating new rules (p. 115)
Changing a rule (p. 118)
Applying a rule to existing E-Mail messages (p. 119)
Moving or copying E-Mail messages (p. 100)

6.11.5 Creating new rules for the subject and the sender

You can easily create a new rule for an E-Mail's subject and sender when viewing the E-Mail in the detail view.

How to create a new rule for the subject and the sender:

1. Select an E-Mail.
2. Click the **More actions** icon ⋯ in the detail view. Click on **Create filter rule**. The *Create new rule* window opens.
3. Enter a rule name. You can adjust the conditions.
   Set an action.
4. In order to save the rule, click on **Save**.
   To save the rule and apply it to existing E-Mail messages, click on **Save and apply**. Select the folder containing the E-Mail messages to which the rule should be applied.

Related topics:

Creating new rules (p. 115)
Changing a rule (p. 118)
Applying a rule to existing E-Mail messages (p. 119)
Viewing Email Messages (p. 77)

6.11.6 Changing a rule

The following options are available:

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

How to change existing rules:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
   Click on **Mail** in the left pane. Click on **Filter rules**.
2. To edit a rule's settings, click on **Edit** next to the rule. Change the settings in the *Edit rule* window.
3. To disable a rule, click on **Disable** next to the rule.
   To enable a rule, click on **Enable** next to the rule.
4. 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.
5. To delete a rule, click the **Delete** icon × next to the rule.

Related topics:

Creating new rules (p. 115)
Creating a new rule when moving (p. 117)
Creating new rules for the subject and the sender (p. 118)
Applying a rule to existing E-Mail messages (p. 119)

6.11.7 Applying a rule to existing E-Mail messages

You can filter existing E-Mail messages later by applying a rule to an E-Mail folder.

Note: Depending on the E-Mail server, this function might not be available.

How to apply a rule to existing E-Mail messages:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Mail** in the left pane. Click on **Filter rules**.
3. Click on **Apply** next to the rule. Select the folder containing the E-Mail messages to which the rule should be applied.
   Note: Some actions cannot be executed if applying a rule to existing E-Mail messages.

Options:

- You can also apply a rule to existing E-Mail messages while creating a new rule.
  To do so, click on **Save and apply rule now** when creating the new rule. Select the folder containing the email messages to which the rule should be applied.

Related topics:

Creating new rules (p. 115)
Creating a new rule when moving (p. 117)
Creating new rules for the subject and the sender (p. 118)

6.12 Searching for E-Mail Messages

Learn how to search for email messages:

- define folders that are to be searched
  By default, all email folders and their subfolders will be searched, except for the **Trash** and **Spam** folder.
- use search terms for sender, recipient, subject, email text, attachment file names
  Use quotation marks for search terms that include several words.
- search the email text for specific wording
- limit the search to a specific time frame
- If categories are available in your configuration, you can search for email messages with a specific category.
- limit the search to email messages with attachments or with coloured labels

You can use just one option or several options in any combination.

Notes:

- Inbox tabs will not be considered when searching for email messages. The categories bar will be hidden when using the search function.
- When using Unified Mail: The **Unified Mail** folder cannotbe browsed.
  Also see: Using Unified Mail (p. 107)

How to search for E-Mail messages:

1. Enter a search term in the search field in the menu bar.
   The search menu opens. It shows filters for email data that can be searched for the search term.
2. Define the email data to be searched:
   - In order to search in the sender, recipient, subject or in the email text, click on **Contains** in the search menu. You can also press Enter.
     Note: Depending on the configuration, the email text might not be searched.
     The search will include senders and recipients whose name starts with the search term. Otherwise, email data that contain the search term in any place will be searched for.
   - In order to only search in specific email data, click on the respective filter in the search menu.
     Note: Depending on the configuration, the search in the email text might take a while.
   - If contacts match the search term, those contacts will be suggested in the search menu. To search for email messages that contain one of those contacts as sender or recipient, click on the contact.
3. You can use additional filters by clicking the **More search options** icon ⌵ in the search field. A window with search options opens.
   - To define the folder to be searched, select an entry in **Search in**.
     If you select **All folders**, all folders and sub-folders of the internal E-Mail account are searched.
     Note: Depending on the email server, this function might not be available. In this case, only the current folder will be searched, no subfolders.
   - To search in the sender, recipients, subject or email text, enter a search term in the respective input fields.
   - To search the email text for a specific wording, use quotation marks when entering the wording in the **Contains words** input field.
   - To search in the attachments' file names, enter a search term in the respective input field.
   - To limit the search to email messages that have been sent or received within a certain time frame, use **After** and **Before**.
   - To search for email messages that have been marked with a specific category, enter the name of the category in **Categories**.
     Note: Depending on the configuration, categories might not be available.
   - To limit the search to email messages with attachments, enable **Contains attachments**.
   - To limit the search to email messages with coloured flags, enable **Has coloured flag**.

   Click on **Search**.

The search results will be displayed in the list view. For each search result, the folder with the found object is displayed.

Below the search window, the filters used will be displayed except for the **Contains words** filter. The following options are available:

- You can add filters and start a new search by clicking the **More search options** icon ⌵ in the search field.
- You can remove a filter and start a new search by clicking the **Remove filter** icon × next to the filter.

In order to finish the search, click the **Cancel search** icon × in the search field.

Related topics:

Viewing Email Messages (p. 77)
Categorising E-Mail messages (p. 103)
Organising email messages with categories (p. 102)

6.13 Sending or Receiving Email Messages as Deputy

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

Learn how to act as another user's deputy [13]. Depending on the permissions granted by this user, you can do the following:

- read email messages in the user's inbox
- edit, manage or delete email messages in the user's inbox
- send email messages on behalf of the user

How to send email messages as deputy:

1. Use one of the following methods:
   - Click on **Compose** in the tool bar.
     Click on the sender address next to **From:** in the email editing window. Select the sender on whose behalf you want to send the email.
   - In the folder tree under **Shared folders**, open the inbox of the user who appointed you as deputy. Click on **Compose** in the tool bar.

   Next to **On behalf of**, the sender on whose behalf you want to send the email will be pre-entered.
2. Complete the steps for composing and sending the email.
   Depending on the configuration, the email text will include a note informing the recipients that the email has been sent by a deputy.

The recipient will see the following senders in the display area:

- The sender on whose behalf you sent the email.
- The deputy who sent the email.

If the recipient replies to the email, the reply will be sent to the sender and the deputy.

How to read, edit or organise email messages as deputy:

1. In the folder tree under **Shared folders**, open the inbox of the user who appointed you as deputy.
2. Depending on the permissions that have been granted to you, you can do the following:
   - As viewer, you can read all email messages. You can mark a single email as read, assign a colour to the email or print the email.
   - As editor, you can also mark all email messages in the inbox as read.
   - As author, you can also create subfolders, move a single email or move all email messages in the inbox.

User interface:

The email editing window (p. 75)

Related topics:

Sending Email Messages (p. 79)
Managing E-Mail messages (p. 98)
Creating, Editing or Managing Appointments as Deputy (p. 184)
Managing Deputies (p. 305)

6.14 Adding E-Mail Accounts

By default, you use your primary email account [13] in the groupware. If you use additional email accounts like e.g. GMail, you can add those accounts to the groupware. This allows you to access those accounts' email messages from within the groupware.

How to add an E-Mail account:

1. Click the **More actions** icon next to **New email**. Click on **Add email account**.

   You can also click the **Settings** icon in the menu bar. Click on **Add email account**.

   The *Add EMail Account* window opens.

2. Click an icon. The next procedure depends on the E-Mail account provider.

   - For some providers, a new browser window opens. Log in with your credentials to grant access to the E-Mail account.
   - If the provider asks you for the permission to access the data, grant this permission.
   - For some providers, enter your credentials in the *Add E-Mail Account* window. Then, click on **Add**.

   You can also manually enter the required data by clicking on **Manually**.

3. If the E-Mail messages in this account are also to be shown in the **Unified Mail** folder, enable **Use unified mail for this account**.

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

An entry for the email account appears in the folder view. The entry contains this account's email folders.

You can read this account's email messages but depending on the configuration, you might not be able to send email messages from this account.

If the access to the E-Mail account fails, a warning icon will be displayed next to E-Mail account's name. Depending on the E-Mail provider, you will get troubleshooting notes when clicking the warning icon.

Related topics:

Using Unified Mail (p. 107)
Selecting the sender address when sending (p. 81)
Specifying a reply address when sending (p. 81)
Using signatures (p. 87)

Editing the primary E-Mail account (p. 309)
Viewing, editing, deleting accounts (p. 311)

6.15 Email Settings

How to open the Email settings:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Click on **Mail** in the left pane.

The settings can be found in the following sections:

- Layout (p. 125)
- Reading (p. 125)
- inbox categories (p. 125)
- Signature (p. 125)
- Compose & Reply (p. 126)
- Email aliases (p. 126)
- Templates (p. 126)
- Rules (p. 126)
- AI integration (p. 126)
- Folder (p. 126)
- Advanced settings (p. 127)

Also see: Searching for Settings (p. 38)

Layout
Defines the layout of the list view and the detail view in the display area.

Reading

- **Email list item**
  - **simple, contact pictures, checkboxes**
    Defines whether contact images, checkboxes or none of these elements will be displayed in the list view.
  - **Show text preview**
    Defines whether the first words of the mail content will be displayed in the email list view.
  - **Show categories**
    Defines whether the categories assigned to the email will be displayed in the email list view.
    Note: Depending on the configuration, categories might not be available.
  - **Always show full date and time**
    Defines whether not only the date of receipt but also the time of receipt will be displayed in the email list view.
  - **show message size**
    Defines whether an email's size will be displayed in the email list view.
- **Reading pane**
  - **Use colours for quoted lines**
    Specifies whether original messages are highlighted and introduced with a vertical line. This option assumes that the original mail text is not attached but appended to the E-Mail.
  - **Use fixed-width font for text email messages**
    Specifies whether a fixed-width font is used when displaying a plain text E-Mail.
  - **Font size**
    Defines the font size when displaying an email.
- **Mark as read**
  Defines the period after which an email will be automatically marked as read when selecting the email.
  - **Immediately**
    The email will immediately be marked as read.
  - **After 5 seconds, after 20 seconds**
    The email will be marked as read after the period defined.
  - **Never**
    The email will not automatically be marked as read.

inbox categories
See Working with inbox categories (p. 99)

Signature
See Using signatures (p. 87)

Compose & Reply

- **Message format**
  Defines the format in which email messages are sent:
  - **HTML**
    The email will be sent with HTML markup. You can format the email text.
  - **Plain text**
    The email text will be sent as plain text without formatting.
  - **HTML and plain text**
    The email will be sent with HTML markup and additionally as plain text.
- **Default text style**
  Defines the preset font style for E-Mail text in HTML format.
- **Undo send**
  Defines whether email messages will be sent immediately or with a short delay.
  - **Without delay**
    The email will be sent immediately. You cannot undo the sending of the email.
  - **5 seconds, 10 seconds**
    The email will be sent with the delay selected. You can undo the sending of the email within this time frame.

AI integration

See Using the AI Integration (p. 93)

Email aliases

- **Email aliases**
  Specifies the pre-set sender address for new email messages.
  Note: The sender's name is displayed in front of the sender address. If you enter a name in the **Your name** input field in the **Your Accounts** section of the Accounts settings, this name overwrites the preset sender name.

Templates

See Using templates (p. 86)

Rules

- **Add new rule**
  See Using E-Mail Filters (p. 114)
- **Vacation notice**
  See Sending a vacation notice automatically (p. 92)
- **Auto-forward**
  See Automatically forwarding email messages (p. 91)

Folder

- **“Unread” folder that contains all unread email messages**
  Defines whether the **Unread** folder is displayed in the folder view.
- **“folder “Flagged” that contains flagged email messages**
  Defines whether the **Flagged** folder is displayed in the folder view.
- **Change IMAP subscriptions**
  See Subscribing to shared or personal E-Mail folders (p. 300)

Advanced settings

- **Behaviour**
    - **Show requests for read receipts**
      Defines whether a return receipt is displayed if a received E-Mail includes a receipt confirmation request.
    - **Permanently remove deleted email messages**
      Defines whether deleted E-Mail messages will be removed permanently or whether they will go to the trash folder.
      Warning: Depending on the configuration, permanently deleted email messages cannot be recovered.
      See Deleting E-Mail messages (p. 109)
    - **Select newest read message automatically at start**
      Defines whether the most recent read message will be selected automatically when starting the app.
    - **Ask for mailto link registration**
      Determines whether the groupware may ask for a registration for mailto links when you click on a link on a website to send an email. You can also register the groupware for mailto links by clicking on **Register now**.
- **Reading**
    - **Allow displaying HTML formatted email messages**
      Specifies whether or not displaying HTML messages is allowed.
- **Automatic email address collection**
  Defines whether new email addresses are automatically added as new contacts in the **Collected addresses** folder when sending or reading a new email.
- **Forward E-mail messages as**
  Specifies how an E-Mail text is sent when forwarding the E-Mail.
    - **Inline**
      The text is sent within the new E-Mail text.
    - **Attachment**
      The text is sent as attachment to the new E-Mail.
- **Compose & Reply**
    - **Insert the original Email text into a reply**
      Specifies whether the original email text is appended to an email reply.
    - **Ask before replying to a mailing list**
      Defines whether you have to confirm the recipient when replying to a mailing list.
    - **Always attach my detailed contact data as vCard**
      Specifies whether your contact data will be attached to a new email in the vCard format.
- **Always add to 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.

User interface:

The E-Mail settings menu (p. 69)
The E-Mail list view (p. 72)
The E-Mail folder view (p. 70)

Related topics:

Sending Email Messages (p. 79)
Editing the primary E-Mail account (p. 309)
Viewing Email Messages (p. 77)
Collecting addresses (p. 101)
Searching for Settings (p. 38)
Customised Settings (p. 37)

7 Calendar

Learn how to schedule your personal appointments and group appointments in the Calendar app.

How to start the Calendar app:

Click the **All Applications** icon ≡ in the menu bar. Click on **Calendar** in the App Launcher.

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

Topics:

- The Calendar Components (p. 130)
- Viewing Appointments (p. 141)
- Viewing or Saving Appointment Attachments (p. 146)
- Creating Appointments (p. 147)
- Additional Functions for Creating Appointments (p. 156)
- Responding to Appointment Invitations (p. 160)
- Forwarding Appointments (p. 161)
- Editing Appointments (p. 162)
- Calling Appointment Participants (p. 164)
- Adding Calendars (p. 165)
- Managing Appointments (p. 170)
- Deleting Appointments (p. 177)
- Using Resource Calendars (p. 178)
- Searching for Appointments (p. 183)
- Creating, Editing or Managing Appointments as Deputy (p. 184)
- Using Groups (p. 185)
- Using Resources (p. 186)
- Using Managed Resources (p. 187)
- Calendar Settings (p. 190)

7.1 The Calendar Components

Learn about the components of the Calendar app user interface and how to use them:

- The Calendar settings menu (p. 131)
- The New appointment button (p. 131)
- The mini calendar (p. 132)
- The Calendar folder view (p. 133)
- The Calendar tool bar (p. 134)
- Day, Work week, Week, Month or Year calendar view. (p. 135)
- The date picker (p. 136)
- The Calendar pop-up (p. 137)
- The Calendar list view (p. 138)
- The Calendar detail view (p. 138)
- The scheduling view (p. 139)
- The appointment editing window (p. 140)

7.1.1 The Calendar settings menu

The **Settings** icon in the menu bar opens a menu with the following functions:

- Adjust all settings
- Select a theme for the user interface
- **Show mini calendar**. Defines whether the mini calendar will be displayed above the folder view.
- Depending on the configuration: **Browse categories**. Shows all items that have been tagged with a specific category.
- **Print**. Opens a print view of the current calendar view.
- Subscribe to shared calendars, subscribe to or import other calendars
- Depending on the configuration: **Connect your Device**. Launches a wizard for setting up local apps with which you can access your groupware data.

General description of the user interface:

The menu bar (p. 23)

Instructions:

Calendar Settings (p. 190)
The mini calendar (p. 132)
Browsing categories (p. 314)
Printing appointments (p. 176)
Subscribing to Google calendars (p. 166)
Subscribing to public and shared calendars (p. 167)
Subscribing to external calendars from an iCal URL (p. 168)
Importing calendars from files (p. 169)
Using a Wizard to Set Up Local Apps (p. 47)

7.1.2 The New appointment button

Creates a new appointment. If clicking the **More actions** icon, a menu with additional functions opens:

- Show scheduling view
- Subscribe to shared calendars, subscribe to or import other calendars
- New email, New contact, New task

Note: If the folder is closed, the button will be displayed as an icon. In this case, the **More actions** icon will not be available. To show the folder view, click the **Open folder view** icon on the bottom left side.

General description of the user interface:

The button for creating new objects (p. 26)

Instructions:

Creating Appointments (p. 147)
Using the scheduling view (p. 157)
Subscribing to Google calendars (p. 166)
Subscribing to public and shared calendars (p. 167)
Subscribing to external calendars from an iCal URL (p. 168)
Importing calendars from files (p. 169)

7.1.3 The mini calendar

Displays a clear overview of a month, year or several years above the folder view. The contents and functions are mostly identical with the date picker.

To view the mini calendar, proceed as follows:

1. If the folder view is not displayed, click the **Open folder view** icon on the bottom left side.
2. Click the **Settings** icon in the menu bar. Disable **Mini calendar**.

Content

- **Browse** icons ‹›. If clicking the icons, the displayed time range is browsed: one month, one year, 12 years.
- If a month is displayed:
  - The header contains the name of the month and the year.
  - Calendar weeks and the days of the month are displayed.
  - 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 year is displayed.
- If a year is displayed:
  - The header contains the year.
  - The names of the months are displayed.
  - If clicking on a month name, the month is displayed.
  - If clicking on the year in the header, a time range of 12 months is displayed.
- If a time range of 12 months is displayed:
  - The header contains the start and end of the time range.
  - The years within the time range are displayed.
  - If clicking on a year, the name of the months of the year are displayed.

Related topics:

The Calendar settings menu (p. 131)

7.1.4 The Calendar folder view

Displays the calendars.

If the folder view is closed, no calendars will be displayed. To show the folder view, click the **Open folder view** icon ◫ on the bottom left side.

Content

- **My calendars**. Contains your personal calendars.
- **Public calendars**. Contains calendars shared with all users.
  The **All my public appointments** calendar contains the public appointments you participate in.
- **Shared calendars**. Contains calendars shared with you by other users.
  If the shared calendar comes from another groupware installation, the user name will be appended with the name of the other domain.

Notes:

- You can also view appointments in public or shared calendars if you are not a participant.
- Depending on the configuration or user actions, additional calendars might be available.

General description of the user interface:

The folder view (p. 27)

Related topics:

Adding personal calendars (p. 166)
Managing Appointments (p. 170)
Creating resource calendars and resource calendar groups (p. 179)
Editing resource calendars (p. 181)
Creating appointments by using the resource calendar (p. 182)
Managing Data with Folders (p. 288)
Sharing Data (p. 294)

7.1.5 The Calendar tool bar

Depending on the view, contains functions for viewing, editing and organising appointments.

Note: Some functions are only available if you opened a calendar for which you have the permission to edit appointments.

When having selected one of the calendar views **Day**, **Work week**, **Week**, **Month**, **Year** the following elements will be displayed:

- **Previous timeframe** icon ‹, **Today** button, **Next timeframe** icon ›
- Depending on the selected timeframe: current date, current month, current year.
  If the **Show mini calendar** option has been disabled in the **Settings** menu ⚙, the date picker will be displayed when clicking on the current date.
- If you have selected the **Day** view: **Split** button. Displays the calendars selected in the folder view, in separate columns.
- Menu for selecting a view: **Day**, **Work week**, **Week**, **Month**, **Year**, **List**

If you select an appointment in the **List** view, the following elements will be displayed:

- **Edit** icon ✎. Edits an appointment's data.
- **Delete** icon 🗑. Deletes the appointments selected by you.
- **More actions** icon ···. Opens a menu with functions for managing appointments.

General description of the user interface:

The tool bar (p. 28)

Instructions:

Editing Appointments (p. 162)
Deleting Appointments (p. 177)
Creating a follow-up appointment (p. 158)
Moving appointments to another calendar (p. 174)
Exporting appointments (p. 175)
Printing appointments (p. 176)
Sending an E-Mail to appointment participants (p. 91)
Inviting participants to a new appointment (p. 158)

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

Displays the appointments of the calendars selected in the folder view, for the chosen time range. If clicking on an appointment, its data is shown in the pop-up.

To display the calendar view, select one of the following entries on the right side of the menu bar: **Day**, **Work week**, **Week**, **Month** or **Year**.

Contents of the **Day** view

- The red line in the calendar sheet displays the current time.
- On the left side of the calendar sheet, the time is displayed in the default timezone.
  To display additional timezones, click on the default timezone.
- The day’s appointments
  If there are additional appointments above or below the visible calendar sheet, arrows are displayed at the top or the bottom of the calendar sheet.

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

- Days of the week. The current weekday is highlighted in red.
  In the **Your week**section of the calendar settings, you can define the number of days for a work week and the first day of a work week.
- If clicking on a weekday, the window for creating a new whole day appointment opens.
- The red line in the calendar sheet displays the current time.
- On the left side of the calendar sheet, the time is displayed in the default timezone.
  To display additional timezones, click on the default timezone.
- The work week’s or the week’s appointments
  If there are additional appointments above or below the visible calendar sheet, arrows are displayed at the top or the bottom of the calendar sheet for the respective day.

Contents of the **Month** view

- Month, year
- The days of the month
- The month’s appointments

Contents of the **Year** view

- Year. If clicking on it, a window for selecting a year opens.
  To close the window without selecting a year, again click on the year.
- An overview of a year's days and months
  As opposed to the other calendar views, no appointments will be displayed.
- If clicking on a month, the **Month** view will be opened.

Related topics:

How are appointments displayed in a calendar view? (p. 144)
Displaying resource calendars (p. 180)
Displaying appointments in different views (p. 142)
Calendar Settings (p. 190)

7.1.7 The date picker

Shows a window with a calendar for selecting a date. The contents and functions are mostly identical with the mini calendar.

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

- Click on the date on the upper left side of the **Day**, **Work week** or **Week** calendar view.
  The date picker is only displayed if the mini calendar is hidden. To hide the mini calendar, click the **Settings** icon ⚙ in the menu bar. Disable **Mini calendar**.
- Click on a date input field in the appointment or task editing window.
- Click on the date on the upper left side of the scheduling view.

The date picker will be closed as soon as you select a date or click outside the date picker.

Content

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

Related topics:

Using the date picker in the editing window (p. 149)
Displaying appointments in different views (p. 142)

7.1.8 The Calendar pop-up

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

Content

- Icons for frequently used functions
  More actions icon ⋯. Opens a menu with functions for managing appointments.
  Note: Depending on the configuration, the following limitations might prevail:
  - Some icons 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.
- Appointment data:
  - title
  - Depending on the configuration: the categories assigned
    Clicking on a category searches for appointments to which this category has been assigned.
  - date, time, timezone
  - For recurring appointments: the recurrence type
  - appointment location, if entered
- for conferences: a button to join the conference
- Additional appointment data, if set:
  - Attachments
  - definition
  - organiser, additional recipients, resources
    If clicking on a name, a pop-up opens. It displays the participant's **Halo View**:
    - the personal data of the participant
    - the history of your email conversation with this participant
    - the history of your appointments with this participant
  - If the appointment has more than five participants, the number of participants and the number of acceptances will be displayed.
- **Display as** button. Defines whether the appointment is displayed as booked or free.
  Click for additional appointment details:
  - the appointment's organiser
  - which calendar
  - who created the appointment and when
  - who was the last person to modify the appointment
- buttons for changing your confirmation status: **Accept**, **Maybe**, **Decline**
  If clicking the **More actions** icon ⋯, a window opens where you can change your confirmation status and add a comment.

General description of the user interface:

The pop-up (p. 32)

Related topics:

Displaying appointments in different views (p. 142)

7.1.9 The Calendar list view

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

To display the list view, select **List** in the menu on the right side of the tool bar.

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.

General description of the user interface:

The list view (p. 30)

Related topics:

Displaying appointments in different views (p. 142)

7.1.10 The Calendar detail view

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

To display the detail view, select **List** in the menu on the right side of the tool bar.

Content

- Appointment data:
  - title
  - Depending on the configuration: the categories assigned
    Clicking on a category searches for appointments to which this category has been assigned.
  - date, time, timezone
  - For recurring appointments: the recurrence type
  - appointment location, if entered
- for conferences: a button to join the conference
- buttons for changing your confirmation status: **Accept**, **Maybe**, **Decline**
  If clicking the **More actions** icon ⋯, a window opens where you can change your confirmation status and add a comment.
- Additional appointment data, if set:
  - Attachments
  - definition
  - organiser, additional recipients, resources
    If clicking on a name, a pop-up opens. It displays the participant's **Halo View**.
  - If the appointment has more than five participants, the number of participants and the number of acceptances will be displayed.
- **Display as** button. Defines whether the appointment is displayed as booked or free.
  Click for additional appointment details:
  - the appointment's organiser
  - the calendar with the appointment
  - the creator's name
  - the name of the last editor

General description of the user interface:

The detail view (p. 31)

Related topics:

Viewing Appointments (p. 141)
Displaying contacts in the halo view (p. 204)

7.1.11 The scheduling view

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

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

- Click the **More actions** icon ⌵ next to **New appointment**. Click on **Scheduling**.
- Click on **Find a free time** in the appointment editing window.

Content

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

Related topics:

Using the scheduling view (p. 157)

7.1.12 The appointment editing window

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

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

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

Content

- Appointment data
  - **title**
  - **Starts on** and **Ends on**. Set the start and end date of the appointment. Clicking on it opens the date picker.
  - If clicking on a timezone button next to a time, a window opens that allows you to select a time zone for the appointment's start and end time.
    In the **Additional timezones** section of the calendar settings, you can set frequently used time zones as favourites.
  - **All day**. Defines whether the appointment is supposed to last whole days.
  - **Find a free time**. Opens the scheduling view. In this view, you can find a free time when scheduling an appointment with several participants.
  - **Repeat**. Defines whether the appointment is supposed to be repeated.
  - **Conference**. Defines whether the appointment is supposed to take place as audio or video conference.
    If you select a provider for the meeting, the following will be displayed:
    - a link and a dial-in number for attending the conference
    - buttons to copy the link or dial-in numbers to various places
  - **Location**, **Description** input fields. Location and description can be optionally entered.
  - **Participants and resources** input field. Enter the names of additional participants or resources.
  - **Find a free time**. Opens the scheduling view.
  - The appointment’s participants and resources
  - **Participants can make changes**. Defines whether participants can edit the appointment.
- Appointment view
  - **Visibility**. Defines the visibility of the appointment in a shared calendar:
    - **Standard**. The appointment is visible to all users.
    - **Private**. Users that are no participants can only view the appointment date.
    - **Secret**. Users that are not participants cannot view the appointment.
  - **Show as free**. Defines whether the appointment is displayed as free. Enable this checkbox to avoid conflicts with overlapping appointments.
  - **Reminder**. Defines when and how you will be reminded about the appointment's due date.
  - **Calendar**. Shows the calendar in which the appointment will be created. If clicking on it, a menu for selecting a calendar opens.
  - **Appointment colour**. You can define the colour in which the appointment is displayed.
  - **Categories**. Allows you to add or edit categories.
    Note: Depending on the configuration, this function might not be available.
- **Add attachments**. Adds files.

General description of the user interface:

The editing window (p. 34)

Related topics:

Creating Appointments (p. 147)
Editing Appointments (p. 162)

7.2 Viewing Appointments

Learn how to display the appointments of one calendar or several calendars in different ways:

- Displaying appointments in different views (p. 142)
- Displaying multiple time zones (p. 143)
- How are appointments displayed in a calendar view? (p. 144)

7.2.1 Displaying appointments in different views

Learn how to display the appointments of a calendar or several calendars in different views:

How to view an appointment:

1. Select a calendar in the folder view. Make sure the checkbox next to the calendar is enabled.
2. Select one of the following views on the right side of the tool bar: **Day**, **Work week**, **Week**, **Month**, **List**.
3. If you have selected a calendar view:
   - 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.
   - Click on an appointment in the calendar sheet. The calendar's data is displayed in the pop-up.

   If you have selected the list view:
   - Click on an appointment in the list view. The appointment's data is displayed in the detail view.
   - You can use the cursor keys to browse the list view.
   - You can open an appointment in a window by double-clicking on the appointment in the list view.

Options:

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

User interface:

Day, Work week, Week, Month or Year calendar view. (p. 135)
The date picker (p. 136)
The Calendar pop-up (p. 137)
The Calendar list view (p. 138)

Related topics:

How are appointments displayed in a calendar view? (p. 144)
Displaying multiple time zones (p. 143)
Viewing or Saving Appointment Attachments (p. 146)
Searching for Appointments (p. 183)

7.2.2 Displaying multiple time zones

In addition to the default time zone, you can display time zones that you have added to favourites. The default time zone can be changed in the **Language & time zone** section of the general settings.

How to display multiple time zones in a calendar view:

1. Select one of the following views on the right side of the tool bar: **Day**, **Work week** or **Week**.
2. Click on the **Time zone** button ▽ on the upper left side of the calendar sheet.
   A menu opens. Enable a time zone or several time zones in the menu below **Favourites**.
   By clicking on **Manage favourites** you can add/remove time zones to/from favourites.

User interface:

Day, Work week, Week, Month or Year calendar view. (p. 135)

Related topics:

Displaying appointments in different views (p. 142)
Managing favourite time zones (p. 172)

7.2.3 How are appointments displayed in a calendar view?

The following appointment properties define an appointment's display in the calendar view:

- The appointment colour
  By default, appointments are displayed in the calendar colour. You can also set the appointment colour as follows:
  - You can assign a colour to an appointment.
  - Depending on the configuration, an appointment can be displayed in the colour of its category.
- Your appointment confirmation: Accepted, Maybe, Declined
- The setting whether an appointment is displayed as Free
  Such an appointment does not cause conflicts when overlapping with other appointments.
- The appointment's visibility in shared calendars: Standard, Private, Secret

Default appointment display
These appointments are visible to all users with whom the calendar is shared. Depending on your appointment confirmation status, those appointments are displayed as follows:

- An unconfirmed appointment is displayed in gray and hatched. The subject is preceded by a period.
- A confirmed appointment will be displayed in its appointment colour.
- A confirmed appointment that is displayed as Free is displayed in its appointment colour and hatched.
- An appointment with the status Maybe will be displayed in its appointment colour. The subject is preceded by a question mark icon.
- An appointment that you have declined will be displayed in grey. The subject will be preceded by the **Declined** ⊗ icon. The subject is crossed out.
  In the **Advanced settings** section of the calendar settings, you can define whether declined appointments will be displayed.
- Depending on the configuration:
  An appointment that has been declined by all other participants will be marked with the **All declined** ❗ icon.

Private appointment display
For the display of private appointments, the following also applies:

- Private appointments are marked with the **Private** icon.
- In a shared calendar, the private appointment is visible to all participants. All other users will only see the private appointment's date, but no other appointment data.

Secret appointment display
For the display of secret appointments, the following also applies:

- Secret appointments are marked with the **Secret** icon.
- In a shared calendar, the secret appointment is visible to all participants. For all other users, the secret appointment is invisible
- Secret appointments are not considered for the conflict handling. It is not displayed in the scheduling view.

Appointment icon overview
If there is enough space, the following icons are displayed in the Day, Workweek and Week calendar view, depending on an appointment's properties:

- recurring appointment
- appointment with several participants
- private appointment
- secret appointment
- unconfirmed appointment
- ⊗declined appointment
- Depending on the configuration:
  ❗appointment declined by all other participants

Related topics:

Day, Work week, Week, Month or Year calendar view. (p. 135)
Displaying appointments in different views (p. 142)
Setting the appointment display in the editing window (p. 152)
Using calendar colours (p. 173)

7.3 Viewing or Saving Appointment Attachments

Learn how to view, read or download task attachments.

The following functions are available:

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

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

How to use the appointment attachment functions:

1. Depending on the view, you have the following options:
   - Click on an appointment with an attachment in a calendar view. Click on an attachment's name in the pop-up.
   - Click on an appointment with an attachment in the list view. Click on an attachment's name in the detail view.
2. Click on the function wanted.

   If there are several attachments, an action can be executed for all attachments at once. To do so, click on **All attachments**.

Note: Depending on the configuration, attachments will be checked for viruses before being downloaded.

- If no virus is found, the attachments will be downloaded without any further notification.
- If a virus scan was not possible or a virus was found, a window with a respective warning opens. In this case you can cancel the download.

User interface:

The Calendar detail view (p. 138)
Day, Work week, Week, Month or Year calendar view. (p. 135)
The Calendar pop-up (p. 137)

Related topics:

Displaying appointments in different views (p. 142)

7.4 Creating Appointments

Learn about the different ways of creating an appointment and what functions are available for defining the appointment data.

Notes:

- To create an appointment in a calendar, you need to have the permission to create objects in the calendar.
- You cannot create appointments in calendar subscriptions.

Tip: 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 to create a new appointment:

1. In the folder view, open a calendar for which you have the permission to create objects.
2. Click on **New appointment**.

   If you work in another app and you do not want to leave that app, you can use the **More actions** icon ⌵ in the button for creating objects.

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

   - If you create the appointment on behalf of the owner, the appointment is created in the owner's shared calendar.
   - If you invite the owner to the appointment, the appointment is saved in your calendar.
3. Enter a title.
4. To set an appointment's start and end time, use the following options below **Start date** and **Ends on**.
   - Click on a date. Enter a date or select a date in the date picker.

     For all day appointments, activate **All day**.
   - Click on a time. Enter the time or select a time from the list.
   - You can set the time zone for the start or end time by clicking on the **Change time zone** button next to a time.
5. You can enter a location and a description.

   If you want to create the appointment in another calendar, click on the calendar name below **Calendar**. Select a calendar.
6. Click on **Create**.

Options:

- To create an appointment, double-click in the calendar sheet on a free area or drag open an area ranging from the beginning to the end of the new appointment.
- In order to create an all day appointment, select the **Work week** or **Week** calendar view. Click on a day above the calendar sheet.
- Depending on the configuration, you can assign a category to the appointment. To do so, click on **Add category** next to **Categories**. Select an existing category or create a new one.
  In order to remove a category, click the **Remove category** icon × next to the category.

User interface:

The appointment editing window (p. 140)

Subordinated actions:

Using the date picker in the editing window (p. 149)
Creating an audio/video conference in the editing window (p. 150)
Creating a recurring appointment in the editing window (p. 151)
Setting the appointment display in the editing window (p. 152)
Setting appointment reminders in the editing window (p. 153)
Adding participants or resources when creating an appointment (p. 154)
Adding attachments when creating an appointment (p. 155)
Resolving conflicts when creating an appointment (p. 155)

Related topics:

Additional Functions for Creating Appointments (p. 156)
Creating appointments by using the resource calendar (p. 182)
Inviting contacts to an appointment (p. 220)
Managing favourite time zones (p. 172)
Using Categories (p. 312)

7.4.1 Using the date picker in the editing window

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

How to use the date picker in the editing window:

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

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

User interface:

The date picker (p. 136)

Super-ordinate actions:

Creating Appointments (p. 147)
Editing Appointments (p. 162)
Creating Tasks (p. 237)
Editing Tasks (p. 241)

7.4.2 Creating an audio/video conference in the editing window

Prerequisite: You have set up an account with an audio or video conference provider.

How to schedule an audio/video conference in the appointment editing window:

1. Click on the **Conference** field. The available providers will be displayed. Select a provider.
   A link will be displayed that can be used by the participants to join the conference. To enable participants to take part in the conference by phone, a dial-in number will be displayed.
2. You can copy the link or dial-in number in order to be found more easily by the participants:
   - To copy the link to the **Location** field, click on **Copy to location field**.
   - To copy the link to the clipboard, click on **Copy to clipboard**.
   - To copy the dial-in numbers to the appointment description, click on **Add details to appointment description**.

A participant can join the conference by clicking on the link or by using a dial-in number by phone.

Superordinated action:

Creating Appointments (p. 147)
Editing Appointments (p. 162)

Related topics:

Calling Appointment Participants (p. 164)
Calling Contacts (p. 214)
Calling the Sender or Another Recipient (p. 96)
Jitsi meetings (p. 191)
Zoom meetings (p. 191)

7.4.3 Creating a recurring appointment in the editing window

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

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

   Click on **Apply**.

Example:

- An appointment or a task should take place each second day. and should take place five times.
  - Repeat **Daily**
  - Interval **2** days
  - Ends **After a number of occurrences**
  - Occurrences **5**
- An appointment or a task should take place each Tuesday and Friday.
  - Repeat **Weekly**
  - Weekday **Tue**, **Fr**
  - Interval **1** week(s)
  - Ends **Never**
- An appointment or a task should take place every second Wednesday. The last appointment should be on 08-03-2023.
  - Repeat **Weekly**
  - Weekday **Wed**
  - Interval **2** week(s)
  - Ends **On specific date**
  - Ends on **08-03-2023**
- An appointment or a task should take place on the first Monday of a month. The event should take place twelve times.
  - Repeat **Monthly**
  - Repeat by **Date**
  - Interval **1** month(s)
  - Ends **After a number of occurrences**
  - Occurrences **12**
- An appointment or a task should take place each year on the last Friday in November.
  - Repeat **Yearly**
  - Repeat by **Week day**
  - Ends **Never**

Superordinated action:

Creating Appointments (p. 147)
Editing Appointments (p. 162)

Related topics:

Creating a recurring task in the editing window (p. 238)

7.4.4 Setting the appointment display in the editing window

The following options are available:

- display the appointment as free
  Such an appointment does not cause conflicts when overlapping with other appointments.
- select an appointment colour
- define the visibility in shared calendars

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

1. If you do not want the appointment to conflict with overlapping appointments, enable **Show as free**.
2. By default, an appointment gets the colour of its calendar. In order to set an individual colour for the appointment, click on **Appointment colour**. Select a colour field.

   In the **Advanced settings** section of the calendar settings, you can define that an appointment gets the colour of the first category added when adding categories to the appointment. In this case, the **Appointment colour** button will be disabled.

   Note: Depending on the configuration, categories might not be available.
3. In a shared calendar, you can use **Visibility** to define the calendar's visibility for other users who are not participants.
   - In the default setting **Standard**, the appointment is visible to all users who have permission to see the calendar.
   - If only the appointment date should be visible for other users but not the subject or other appointment data, select **Private**. Private appointments are marked with the **Private** icon .
   - If the appointment is to be invisible for other users, select **Secret** from the drop-down. Secret appointments are marked with the **Secret** icon .
     Secret appointments do not conflict with other appointments. They are not displayed in the scheduling view.

Superordinated action:

Creating Appointments (p. 147)
Editing Appointments (p. 162)

Related topics:

Using calendar colours (p. 173)
How are appointments displayed in a calendar view? (p. 144)

7.4.5 Setting appointment reminders in the editing window

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

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

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

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

Superordinated action:

Creating Appointments (p. 147)
Editing Appointments (p. 162)

Related topics:

Changing appointment reminders (p. 171)

7.4.6 Adding participants or resources when creating an appointment

You can invite other users or external participants [14] to an appointment.

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

1. In the input field below **Participants and resources**, enter: the email addresses of the participant, the name of a group, distribution list or resource.
   - Matching suggestions will be displayed during input. To accept a suggestion, click on it. To accept the first suggestion, press Enter.
   - To select participants or resources from an address book, click the **Select contacts** icon on the right side of the input field.

   If a participant does not necessarily have to attend, but should be informed of the appointment, you can mark this participant as optional. To do so, click the **Mark as optional** icon next to the participant.
2. Depending on the configuration, you can define whether participants can edit the appointment later. To do so, enable the **Participants can make changes** checkbox. Please note the following:
   - This option will not be available for appointments in public folders.
   - Those appointments cannot be changed by external participants.
   - The checkbox is only available for the appointment's organiser. Each change is done on behalf of the organiser.
   - Participants can add other participants but not remove participants. Participants cannot remove themselves from the appointment.
3. To remove participants or resources, click the **Remove** icon ×.

   By default, you are entered as organiser when creating the appointment. If you create the appointment in a public calendar, you can remove the organiser from the appointment. To do so, click the **Remove** icon ×.

Result:

- All participants will receive a notification in the notification area. In the **Calendar** section of the notification settings, participants can define whether to also receive an appointment invitation by email. External participants receive an appointment invitation by email.
- If participants accept the appointment, the appointment will be entered in their calendar.
- In the **Calendar** section of the notification settings, you can define whether you receive an email notification if a participant accepts or declines the appointment.
  If external participants accept or decline the appointment, you will receive an email.

Notes:

- Depending on the configuration, you can assign a managed resource [15] to the appointment. In this case, the booking representative receives a booking request for this resource.
- As soon as the booking delegate accepts or declines your booking request for the resource, you will be informed.

Tip: To find free times of all participants and resources you can use the scheduling view [157].

Super-ordinate actions:

Creating Appointments (p. 147)
Editing Appointments (p. 162)

Subordinated actions:

Automatically Adding Contacts or Resources from an Address Book (p. 206)
Automatically Adding Contacts or Resources from the Address Directory (p. 207)

7.4.7 Adding attachments when creating an appointment

Depending on the configuration, you can attach files that are saved on your computer or in the Drive app.

How to add attachments in the appointment editing window:

1. Select the files to be sent as attachments:
   - To send a local file as attachment, click on **Add attachment** below **Attachments**.
     You can also drag one or several local files from a file browser or the desktop to the appointment editing window.
   - In order to send the current version of a file from the Drive app as an attachment, click on **Add from Drive** below **Attachments**.
     Note: Depending on the configuration, this function might not be available.
2. You can remove an attachment if required. To do so, click the **Remove attachment** icon ⊖ next to the attachment.

Superordinated action:

Creating Appointments (p. 147)
Editing Appointments (p. 162)

7.4.8 Resolving conflicts when creating an appointment

A conflict occurs when the following circumstances coincide:

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

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

How to resolve conflicts:

1. To show or hide details, you can click on an appointment on the *Conflicts detected* page.
2. Use one of the following methods:
   - To create the appointment despite the conflict, click on **Ignore conflicts**.
   - To resolve the conflict, click on **Cancel**. Change the appointment's times or enable **Show as free**.

Related topics:

Creating Appointments (p. 147)
Using the scheduling view (p. 157)
Creating a follow-up appointment (p. 158)

7.5 Additional Functions for Creating Appointments

Learn what other functions are available for creating appointments:

- Using the scheduling view (p. 157)
- Creating a follow-up appointment (p. 158)
- Inviting participants to a new appointment (p. 158)
- Inviting E-Mail recipients to new appointments (p. 159)
- Creating appointments from iCal attachments (p. 159)

Related topics:

Creating Appointments (p. 147)

7.5.1 Using the scheduling view

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

Tip: In the **Advanced settings** section of the calendar settings, you can define which users are allowed to view your appointments in the scheduling view.

How to use the scheduling view for creating appointments:

1. You have the following possibilities for opening the scheduling view:
   - To use the scheduling view before creating a new appointment, click the **More actions** icon next to **New appointment**. Click on **Scheduling**. The *Scheduling* page opens.
   - To use the scheduling view while creating a new appointment or editing an existing appointment, click on **Find a free time** in the appointment editing window. The *Scheduling* window opens.
2. Enter the name of a participant or resource in **Add participant**.
   - Matching suggestions will be displayed during input. To accept a suggestion, click on it. To accept the first suggestion, press Enter.
   - To select contacts from an address book, click the **Select contact** icon on the right side of the input field.

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

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

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

User interface:

The scheduling view (p. 139)

Subordinated actions:

Automatically Adding Contacts or Resources from an Address Book (p. 206)
Automatically Adding Contacts or Resources from the Address Directory (p. 207)

Related topics:

Creating Appointments (p. 147)
Inviting participants to a new appointment (p. 158)
Resolving conflicts when creating an appointment (p. 155)
Scheduling (p. 192)

7.5.2 Creating a follow-up appointment

You can create a follow-up appointment for an existing appointment. The follow-up appointment will be pre-filled with essential data from the existing appointment.

How to create a follow-up appointment:

1. Depending on the view, you have the following options:
   - Click on an appointment in a calendar view. Click the **More actions** icon ··· in the pop-up.
   - Select an appointment in the list view. Click the **More actions** icon ··· in the tool bar.

   Click on **Follow-up**.
2. Adjust the data for the new appointment. Click on **Create**.

User interface:

The appointment editing window (p. 140)

Related topics:

Creating Appointments (p. 147)
Using the scheduling view (p. 157)
Resolving conflicts when creating an appointment (p. 155)

7.5.3 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, you have the following options:
   - In a calendar view, click on an appointment with multiple participants. Click the **More actions** icon ··· in the pop-up.
   - In the list view, select an appointment with multiple participants. Click the **More actions** icon ··· in the tool bar.

   Click on **Invite to new appointment**.
2. Complete the details for creating an appointment.

User interface:

The appointment editing window (p. 140)

Related topics:

Creating Appointments (p. 147)
Inviting E-Mail recipients to new appointments (p. 159)
Using the scheduling view (p. 157)
Resolving conflicts when creating an appointment (p. 155)

7.5.4 Inviting E-Mail recipients to new appointments

You can invite the recipients of an email sent or received to a new appointment.

How to invite an email’s recipients to an appointment:

1. Select an E-Mail in the E-Mail app.
2. Click the **More actions** icon ··· in the detail view.
   Click on **Invite to appointment**.
3. Complete the details for creating an appointment.

Related topics:

Creating Appointments (p. 147)
Inviting participants to a new appointment (p. 158)
Using the scheduling view (p. 157)
Resolving conflicts when creating an appointment (p. 155)

7.5.5 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**.

Related topics:

Creating Appointments (p. 147)
Resolving conflicts when creating an appointment (p. 155)

7.6 Responding to Appointment Invitations

Learn how to reply to an appointment invitation if you are being added to an appointment.

You will receive the following notifications:

- You are informed about this appointment in the Notification area.
- You will receive an email with an appointment invitation when having enabled email notifications for appointments in the **Calendar** section of the notification settings.

You can respond to the invitation with **Confirm**, **Maybe** or **Decline**. You can always change the status later.

How to answer an appointment invitation in the notification area:

1. In the menu bar, click the **Notifications** icon. The info area opens. Appointment invitations will be displayed below **Invitations**.

   To display the suggested appointment in the calendar, click on the date below the appointment title.
2. Use one of the following methods:
   - To reply to the appointment invitation without a comment, click on one of the buttons **Accept**, **Maybe**, **Decline**.
   - To reply to the appointment invitation with a comment, click the **Add comment** icon ⋯.
     Select one of the options **Accept**, **Maybe**, **Decline** in the *Change confirmation* window. If required, enter a comment.

Result: The appointment will be added to your calendar.

Note: In the **Advanced settings** section of the calendar settings, you can define whether declined appointments will be displayed.

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. Use one of the following methods:
   - To reply to the appointment invitation without a comment, click on one of the buttons **Accept**, **Maybe**, **Decline**.
   - To reply to the appointment invitation with a comment, click the **Add comment** icon ⋯.
     Select one of the options **Accept**, **Maybe**, **Decline** in the *Change confirmation* window. If required, enter a comment.

Result: If you accept the appointment, it will be entered in your calendar.

Note: In the **Calendar**section of the notification settings, you can define whether the invitation email is automatically deleted when accepting or declining an appointment.

User interface:

The notification area (p. 33)

Related topics:

Changing the appointment status (p. 171)
Customising the Notifications (p. 41)

7.7 Forwarding Appointments

Learn how you can invite other people to an appointment as an appointment participant.

- If an appointment has more than one participant, you can invite other people to the appointment as an appointment participant by forwarding the appointment. The person you forward the appointment to gets an invitation email for this appointment.
- As the invited person you can accept or decline the appointment invitation. The appointment's organiser receives a notification if you accept the invitation.
- As the appointment organiser you decide whether the person will be added as an appointment participant.

In case the appointment was not created in the groupware but in an external system:

- The external system decides whether and when a message will be sent about adding the new appointment participant.
- The external system decides whether the person the appointment is forwarded to will be automatically added as an appointment participant.

How you can forward an appointment to other people as an appointment participant:

1. Click on an appointment in a calendar view. Click the **More actions** icon ··· in the pop-up.
2. Click on **Forward appointment**.

   If you have selected an appointment from an appointment series, you will be asked whether the invitation should be sent for the entire appointment series or only for the selected appointment.
3. In the *Forward appointment* window, enter the participant's email address, the name of a group or distribution list in **Add participant**.
   - Matching suggestions will be displayed during input. To accept a suggestion, click on it. To accept the first suggestion, press Enter.
   - To select participants from an address book, click the **Select contacts** icon on the right side of the input field.
     Note: People that are appointment participants already will not be displayed in the address book.

   You can enter a note that will be displayed in the email invitation.
4. Click on **Send invitations**.

How to respond to the invitation to the forwarded appointment as an invited person:

1. In the E-Mail application, select the E-Mail with the invitation to the forwarded appointment.
2. Use one of the following methods:
   - To reply to the appointment invitation without a comment, click on one of the buttons **Accept**, **Maybe**, **Decline**.
   - To reply to the appointment invitation with a comment, click the **Add comment** icon ···.
     Select one of the options **Accept**, **Maybe**, **Decline** in the *Change confirmation* window. If required, enter a comment.
3. To enter the appointment in your calendar, click on **Add to calendar**.

Result: If you accept the appointment, the appointment's organiser receives a notification. The organiser decides whether you will be added to the appointment as a participant.

How to decide as organiser on the participation of the invited person.

1. As soon as a person accepts the invitation to the forwarded appointment, you as the appointment organiser will receive an email.

   Select an E-Mail in the E-Mail app.
2. Use one of the following methods:
   - To add the person as new appointment participant, click on **Add participant**.
   - To decline the participation, click on **Decline participant**.

User interface:

The Calendar pop-up (p. 137)

7.8 Editing Appointments

Learn how to edit an appointment's data or time later.

The following options are available:

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

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

Notes:

- Depending on the configuration, you can only edit an appointment in your private calendars if you are the appointment's organiser.
- Appointments in calendar subscriptions cannot be edited.

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

1. Depending on the view, you have the following options:
    - Click on an appointment in a calendar view. Click the **Edit** icon ✎ in the pop-up.
    - Select an appointment in the list view. Click the **Edit** icon ✎ in the tool bar.
      You can also double-click on an appointment in the list view. The appointment will be displayed in a window. Click the **Edit** icon ✎.

   When having selected an appointment from an appointment series, you determine which appointments of the series you want to change.

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

How to move an appointment to another day:

1. Select one of the following views: **Work week**, **Week** or **Month**.
2. Drag the appointment to another day.
   When having selected an appointment from an appointment series, you determine which appointments of the series you want to change.

How to change an appointment's time or duration:

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

   When having selected an appointment from an appointment series, you determine which appointments of the series you want to change.

User interface:

The appointment editing window (p. 140)

Related topics:

Creating Appointments (p. 147)
Changing appointment reminders (p. 171)
Changing the organiser (p. 172)
Managing Appointments (p. 170)
Calendar Settings (p. 190)
Using Categories (p. 312)

Subordinated actions:

Using the date picker in the editing window (p. 149)
Creating a recurring appointment in the editing window (p. 151)
Creating an audio/video conference in the editing window (p. 150)
Setting the appointment display in the editing window (p. 152)
Setting appointment reminders in the editing window (p. 153)
Adding participants or resources when creating an appointment (p. 154)
Adding attachments when creating an appointment (p. 155)

7.9 Calling Appointment Participants

Learn how to call an appointment participant by contacting the appointment participant via audio or video conference or phone.

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

Prerequisite:

- You have set up an account with an audio or video conference provider.
- Your computer has been configured to allow you to make phone calls over the Internet.

How to call an appointment's participants:

1. Depending on the view, you the following options are available:
   - Click on an appointment in a calendar view. A pop-up opens.
   - Select an appointment in the list view. Click on a participant in the detail view. A pop-up opens.

   An icon below the name indicates the participant's presence status.
2. Click the **Call** icon. Use one of the following methods:
   - In the menu, click on an audio or video conference provider. The window for calling the contact opens. Click on **Call**.
   - Select a phone number from the menu.

Related topics:

Creating an audio/video conference in the editing window (p. 150)
Calling the Sender or Another Recipient (p. 96)
Calling Contacts (p. 214)
Calling Task Participants (p. 242)
Setting the Presence Status (p. 48)

7.10 Adding Calendars

With calendars you can organise your appointments e.g. by separately saving your business and private appointments. Learn how to create calendars, use appointments from external calendars and set the view for shared calendars.

The following options are available:

- Adding personal calendars (p. 166)
- Subscribing to Google calendars (p. 166)
- Subscribing to public and shared calendars (p. 167)
- Subscribing to external calendars from an iCal URL (p. 168)
- Importing calendars from files (p. 169)

Related topics:

Managing Appointments (p. 170)
Managing Data with Folders (p. 288)

7.10.1 Adding personal calendars

You can create additional personal calendars below My calendars.

How to create a new personal calendar:

1. Click the **Folder-specific actions** icon + next to **My calendars** in the folder view. Click on **Add new calendar**.
2. Enter a name. In case the new calendar should be a public calendar, enable **Add as public calendar**.
3. Click on **Add**.

User interface:

The Calendar folder view (p. 133)

Related topics:

Subscribing to Google calendars (p. 166)
Subscribing to public and shared calendars (p. 167)
Subscribing to external calendars from an iCal URL (p. 168)
Importing calendars from files (p. 169)
Moving appointments to another calendar (p. 174)
Managing Data with Folders (p. 288)
What are folder types? (p. 289)

7.10.2 Subscribing to Google calendars

Depending on the configuration, you can import your Google calendar's appointments into a groupware calendar by subscribing to your Google calendar.

Notes:

- Appointment changes in Google calendars will be automatically synced to the Google calendar subscription after a short time.
- You cannot create new appointments or edit existing ones in the Google calendar subscription.
- Appointments in the Google calendar subscription will not conflict with appointments in other groupware calendars.
- You will not receive reminders in the groupware for appointments in Google calendar subscriptions.

How to subscribe to your Google calendar:

1. Click the **More actions** icon ⌵ next to **New appointment**. Click on **Subscribe to Google calendar**.
   You can also click the **Settings** icon ⚙ in the menu bar. Click on **Subscribe to Google calendar**.
2. A new browser window opens. Follow the instructions to allow access to your Google calendar.
   The appointments will be imported to a new calendar.

Options:

- In order to refresh the data you have subscribed to, click the **Actions** icon ··· next to the new calendar. Click on **Refresh this calendar**.

User interface:

The Calendar settings menu (p. 131)
The New appointment button (p. 131)

Related topics:

Adding personal calendars (p. 166)
Subscribing to public and shared calendars (p. 167)
Subscribing to external calendars from an iCal URL (p. 168)
Importing calendars from files (p. 169)

7.10.3 Subscribing to public and shared calendars

Calendars that are public or shared by other users can be used as follows:

- You can define which public and shared groupware calendars are displayed in the folder view by subscribing to such calendars.
  This helps you to keep a better overview if there are many public and shared calendars in your groupware environment.
- If you have subscribed to such a calendar, you can set whether this calendar will be synchronised with other clients, e.g. with your smartphone.
- If you no longer need such a calendar, you can cancel the subscription.

How to define the calendars to which you want to subscribe and which are to be synchronised:

1. Click the **More actions** icon next to **New appointment**. Click on **Subscribe shared Calendar**.
   You can also use one of the following methods:
   - Click the **Settings** icon in the menu bar. Click on **Subscribe shared Calendar**.
   - In the **Advanced settings** section of the calendar settings, use the **Subscribe to shared calendars** button.

   A window opens. It shows your private, public and shared calendars.
2. If you want a calendar to be displayed, enable the **Subscribe to calendar** button.
   To define that a displayed calendar is synchronised, enable the **Synchronise via DAV** checkbox.
3. If you no longer want a calendar to be displayed and synchronised, disable the **Subscribe to calendar** button.

User interface:

The New appointment button (p. 131)
The Calendar settings menu (p. 131)
Calendar Settings (p. 190)

Related topics:

Adding personal calendars (p. 166)
Subscribing to Google calendars (p. 166)
Subscribing to external calendars from an iCal URL (p. 168)
Importing calendars from files (p. 169)
Accessing other users' shares (p. 300)
Downloading Personal Data (p. 315)

7.10.4 Subscribing to external calendars from an iCal URL

You can import appointments from external calendars into groupware calendars by subscribing to the external calendar. To do so, you need to know the calendar's iCal URL.

Notes:

- Appointment changes in external calendars will be automatically synced to the calendar subscription after a short time.
- You cannot create new appointments or edit existing ones in the calendar subscription.
- Appointments in the calendar subscription will not conflict with appointments in other groupware calendars.

How to subscribe to external calendars:

1. Click the **More actions** icon next to **New appointment**. Click on **Import from URL (iCal)**.
   You can also click the **Settings** icon in the menu bar. Click on **Import from URL (iCal)**.
   The *Subscribe to iCal feed* window opens.
2. Enter an iCal URL.
3. Click on **Subscribe**.

Options:

- The reminder that is set as default reminder in the **Appointment reminders** section of the calendar settings is used for all appointments of an iCal calendar.
  In order to change this reminder for each appointment in this calendar, click the **Actions** icon ⋯ next to the calendar. Click on **Change reminders**.
- In order to refresh the data you have subscribed to, click the **Actions** icon ⋯ next to the calendar. Click on **Refresh this calendar**.

User interface:

The New appointment button (p. 131)
The Calendar settings menu (p. 131)

Related topics:

Adding personal calendars (p. 166)
Subscribing to Google calendars (p. 166)
Subscribing to external calendars from an iCal URL (p. 168)
Subscribing to public and shared calendars (p. 167)
Importing calendars from files (p. 169)

7.10.5 Importing calendars from files

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

How to import calendars from a file:

1. Click the **More actions** icon next to **New appointment**. Click on **Import file**.
   You can also click the **Settings** icon in the menu bar. Click on **Import file**.
   The *Import from file* window opens.
2. Click on **Upload file**. Select a file.
3. Enter a name for the new calendar. Click on **Import**.

Result: A new calendar will be added.

Note: All participants of the imported appointments will be removed. Instead, you will be added as participant.

Options:

You can also import the appointments of a local iCAL file by dragging the iCAL file from a file browser or the desktop to the calendar view.

- The appointments of the iCAL file will be imported to the current calendar.
- Existing appointments in the current calendar will be ignored. Thus the import can cause duplicates.

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

User interface:

The New appointment button (p. 131)
The Calendar settings menu (p. 131)

Related topics:

Adding personal calendars (p. 166)
Subscribing to Google calendars (p. 166)
Subscribing to external calendars from an iCal URL (p. 168)
Subscribing to public and shared calendars (p. 167)

7.11 Managing Appointments

Learn how to organise your appointments and about the appointment actions available.

- Changing the appointment status (p. 171)
- Changing appointment reminders (p. 171)
- Changing the organiser (p. 172)
- Managing favourite time zones (p. 172)
- Organising appointments with categories (p. 173)
- Using calendar colours (p. 173)
- Moving appointments to another calendar (p. 174)
- Importing appointments (p. 174)
- Exporting appointments (p. 175)
- Printing appointments (p. 176)

Related topics:

Editing Appointments (p. 162)
Adding Calendars (p. 165)
Creating, Editing or Managing Appointments as Deputy (p. 184)

7.11.1 Changing the appointment status

You can change your appointment status at a later point of time. You can add a comment that is visible to other participants.

Notes:

- Depending on the configuration, you can only edit an appointment confirmation in your private calendars if you are a participant of the appointment.
- For appointment series, you can determine which appointments in the appointment series you want to change.

How to change your appointment status:

1. Depending on the view, you have the following options:
   - Click on an appointment in a calendar view. The appointment will be displayed in the pop-up.
   - Select an appointment in the list view. The appointment will be displayed in the detail view.
2. Use one of the following methods:
   - To change the appointment confirmation without comment, click on one of the buttons **Accept**, **Maybe**, **Decline**.
   - To change the appointment invitation with a comment, click the **Add comment** icon ⋯.
     Select one of the options **Accept**, **Maybe**, **Decline** in the *Change confirmation* window. If required, enter a comment.

Related topics:

Responding to Appointment Invitations (p. 160)

7.11.2 Changing appointment reminders

You can change your appointment reminder later by adjusting or removing a reminder or by adding another reminder.

Note: This function is only available if you do not have full edit permissions for the appointment. If this function is not available, you can change the appointment reminder by editing the appointment.

How to change an appointment reminder:

1. Depending on the view, you have the following options:
   - Click on an appointment in a calendar view. Click the **More actions** icon ⋯ in the pop-up.
   - Select an appointment in the list view. Click the **More actions** icon ⋯ in the tool bar.
2. Click on **Change reminders**.
   When having selected an appointment from a series, you can either choose to only change the selected appointment or the selected appointment and all future appointments of the series.
3. Click on a reminder in the *Change reminders* window. The *Edit reminders* window opens.
   You can edit or delete a reminder or add a new one.

Related topics:

Setting appointment reminders in the editing window (p. 153)
Editing Appointments (p. 162)

7.11.3 Changing the organiser

If you are the organiser of an appointment or a recurring appointment with at least two participants, you can change the organiser. You can not change the organiser for the following appointments:

- an appointment with external participants
- an individually changed appointment within a series

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

How to change an appointment's organiser:

1. Depending on the view, you have the following options:
   - Click on an appointment in a calendar view. Click the **More actions** icon ⋯ in the pop-up.
   - Select an appointment or multiple appointments in the list view. Click the **More actions** icon ⋯ in the tool bar.
2. Click on **Change organiser**.
   When having selected an appointment from a series, you can either choose to only change the selected appointment or the selected appointment and all future appointments of the series.
3. Enter the new organiser's E-Mail address in the *Change organiser* window.
   Note: External participants can not be set as organiser.

Related topics:

Editing Appointments (p. 162)

7.11.4 Managing favourite time zones

You can add multiple time zones to favourites.

- Those time zones can be shown in the calendar sheet in addition to the default time zone.
- If you change the time zone of the appointment time in the appointment editing window, these time zones are displayed first.

How to add a time zone to favourites:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Calendar** in the left pane. Click on **Additional time zones**.
3. Select a time zone in **Select time zone**.
   Click on **Add time zone**.
   The additional time zones will be displayed in the list of favourites below **Select time zone**.
4. To remove a time zone from the list of favourites, click the **Delete** icon × next to the time zone.

Related topics:

Calendar Settings (p. 190)
Displaying multiple time zones (p. 143)

7.11.5 Organising appointments with categories

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

To organise appointments independently from calendars, you can use categories.

- You can mark appointments with categories.
- You can display all appointments that have been marked with a specific category.

You can create, edit or delete your own categories, see Managing categories (p. 313).

How to mark appointments with a category:

1. Depending on the view, you have the following options:
   - Click on an appointment in a calendar view. Click the **Edit appointment** icon ✎ in the pop-up.
   - Select an appointment in the list view. Click the **Edit appointment** icon ✎ in the tool bar.

   The appointment editing window opens.
2. To do so, click on **Add category** next to **Categories**. Select a category.
   In order to remove a category from the appointment, click the **Remove category** icon × next to the category.

How to display appointments that have been marked with a specific category:

Depending on the view, you have the following options:

- In a calendar view, click on an appointment that has been marked with a category. In the pop-up, click on the category.
- In the list view, select an appointment that has been marked with a category. Click on the category in the detail view.

Result:

- The list view shows all appointments that have been marked with this category.
- To display the previous view, click the **Cancel search** icon × in the search field.

Options:

- You can also search for appointments with a specific category.
- To show all objects that have been marked with a specific category, you can browse the categories.

Related topics:

Managing categories (p. 313)
Browsing categories (p. 314)
Searching for Appointments (p. 183)
Organising email messages with categories (p. 102)
Organising contacts with categories (p. 221)
Organising tasks with categories (p. 247)

7.11.6 Using calendar colours

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

How to select a calendar colour:

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

Related topics:

The Calendar folder view (p. 133)
How are appointments displayed in a calendar view? (p. 144)

7.11.7 Moving appointments to another calendar

You can move single appointments to another calendar, but no appointment series.

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

How to move appointments to another calendar:

1. Depending on the view, you have the following options:
   - Click on an appointment in a calendar view. Click the **More actions** icon ··· in the pop-up.
   - Select an appointment or multiple appointments in the list view. Click the **More actions** icon ··· in the tool bar.

   Click on **Move**.
2. Select a calendar in the *Move* window. You can create a new calendar by clicking on **Create folder**.
3. Click on **Move**.

Related topics:

Adding personal calendars (p. 166)

7.11.8 Importing appointments

You can import appointments from files in iCal format.

Note: You cannot import appointments into calendar subscriptions.

How to import appointments from an iCal file:

1. Select the calendar for importing the appointments to in the folder view.
2. Click the **Actions** icon ··· next to the calendar. Click on **Import**.
3. In the *Import from file* window, click on **Upload file**. Select a file in iCal format.

   To also import appointments that have the same ID as already existing appointments, enable **Ignore existing appointments**.
4. Click on **Import**.

Result: The contacts are added to the calendar.

Note: All participants of the imported appointments will be removed. Instead, you will be added as participant.

Related topics:

Exporting appointments (p. 175)
Creating Appointments (p. 147)
Importing calendars from files (p. 169)

7.11.9 Exporting appointments

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

How to export individual appointments:

1. Depending on the view, you have the following options:
   - Click on an appointment in a calendar view. Click the **More actions** icon ··· in the pop-up.
   - Select an appointment or multiple appointments in the list view. Click the **More actions** icon ··· in the tool bar.
2. Click on **Export**.

Result: The iCAL file with the appointments exported will be created in the download folder.

How to export all appointments from a calendar:

1. Select a personal or public calendar in the folder view.
2. Click the **Actions** icon ··· next to the calendar. Click on **Export**.

Result: The iCAL file with the appointments exported will be created in the download folder.

Related topics:

Importing appointments (p. 174)
Downloading Personal Data (p. 315)

7.11.10 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. Select one of the following views on the right side of the tool bar: **Day**, **Work week**, **Week** or **Month**.
2. In the folder view, enable the checkboxes of the calendars which appointments you would like to print.
   Select the date range for the appointments to be printed.
3. Click the **Settings** icon ⚙ in the menu bar. Click on **Print**. A window with a print preview opens.
4. If required, change the printer settings. Click on **Print**.
5. Close the print preview window.

How to print an appointment's data:

1. Depending on the view, you have the following options:
   - Click on an appointment in a calendar view. Click the **More actions** icon ⋯ in the pop-up.
   - Select an appointment in the list view. Click the **Settings** icon ⚙ in the menu bar.

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

How to print a list of appointments:

1. Select **List** on the right side of the menu bar.
2. Select the appointments to be printed.
3. Click the **Settings** icon ⚙ in the menu bar. Click on **Print**. 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 **Print**.
5. Close the print preview window.

7.12 Deleting Appointments

Warning: Deleted appointments **cannot** be restored. Depending on the configuration, you can only delete an appointment in your private calendars if you are the appointment's organiser.

You can delete appointments from a calendar if you have the permission to delete items.

How to delete appointments:

1. Depending on the view, you have the following options:
   - Click on an appointment in a calendar view. Click the **Delete** icon in the pop-up.
   - Select an appointment or multiple appointments in the list view. Click the **Delete** icon in the tool bar.
2. Confirm that you want to delete the appointment.

Options:

- When having selected a recurring appointment, you are asked which appointments of the series are to be deleted:
  - When having selected the first appointment of the series, you can either only delete the first appointment or the complete series.
  - When having selected an appointment within the series, you can either only delete the selected appointment or the selected appointment and all future appointments of the series.
  - When having selected the last appointment of the series, you can only delete the last appointment. In the latter case, you are not asked which appointments are to be deleted.
- If you are the appointment's organiser, you can inform other participants about the reason for the deletion by entering a message. The message will be sent as an email.

7.13 Using Resource Calendars

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

To check whether a resource [16] is available or has already been booked for an appointment, you can use resource calendars.

- A resource calendar shows all appointments for which the resource has been booked.
- You can create resource calenders by using the resource list.
- You can create a new appointment while viewing a resource calendar. The resource calendar's resource will automatically be added to the new appointment.

The following options are available:

- Creating resource calendars and resource calendar groups (p. 179)
- Displaying resource calendars (p. 180)
- Editing resource calendars (p. 181)
- Creating appointments by using the resource calendar (p. 182)

Related topics:

Using Resources (p. 186)
Administrating managed resources as booking delegate (p. 189)

7.13.1 Creating resource calendars and resource calendar groups

To create resource calendars, select resources from the resource list.

- For each resource, a resource calendar will be created.
  The list of available resources depends on the configuration that allows administrators or specific users to manage resources [186].
- Resource calendars will be displayed at the bottom of the folder view within resource calendar groups.
- You can create and edit your own resource calendar groups or use the default resource calendar group.

The following options are available:

- create a resource calendar group in the default resource calendar group
- create a new resource calendar group
- add a resource calendar to a resource calendar group

How to create a resource calendar in the default resource calendar group:

1. Click the **Folder-specific actions** icon + next to **My calendars** in the folder view. Click on **Add new resource calendar**.
   The **Select resources** window opens.
2. Select at least one resource. Click on **Select**.

For each of the resources added, a resource calendar belonging to you will be created in the default resource calendar group **Resources**. If the default resource calendar group does not exist already, it will be created automatically.

How to create a new resource calendar group:

1. Click the **Folder-specific actions** icon + next to **My calendars** in the folder view. Click on **Add new resource calendar group**.
   The *Add new resource calendar group* window opens.
2. Enter a name. Click on **Add**.
   The **Select resources** window opens.
3. Select at least one resource. Click on **Select**.

The new resource calendar group will be displayed at the bottom of the folder view. For each of the resources added, a resource calendar belonging to you will be created.

How to add resource calendars to a resource calendar group:

1. Click the **Folder-specific actions** icon ··· next to a resource calendar group in the folder view. Click on **Add new resource calendar**.
   The *Select resources* window opens.
2. Select at least one resource. Click on **Select**.
   Notes:
   - Only resources that are not yet available as resource calendar in this resource calendar group will be displayed.
   - A resource calendar can only exist once in a resource calendar group.
   - A resource calendar can exist in multiple resource calendar groups at once though.

Related topics:

Displaying resource calendars (p. 180)
Editing resource calendars (p. 181)
Creating appointments by using the resource calendar (p. 182)

7.13.2 Displaying resource calendars

To display appointments that are using specific resources, the following options are available:

- display appointments in one or several resource calendars
- display appointments of all resource calendars of a resource calendar group

How to display the appointments of resource calendars:

1. Open a resource calendar group in the folder view. Enable the checkbox next to a resource calendar.

   To show or hide the appointments of other calendars, enable or disable the checkboxes next to the respective calendars.

2. To only display the appointments of a single resource calendar, click the **Folder-specific actions** icon ⋯ next to the resource calendar in the folder view. Click on **Show this resource only**.

   In order to display the previously shown calendars again, do one of the following:

   - Click on a calendar in the folder view.
   - Click the **Folder-specific actions** icon ⋯ next to the resource calendar in the folder view. Click on **Show all calendars**.

How to only display the appointments of a resource calendar group:

1. Click the **Folder-specific actions** icon ⋯ next to the resource calendar group in the folder view. Click on **Show this group only**.
2. To display the previously shown appointments again, click the **Folder-specific actions** icon ⋯ next to the resource calendar group in the folder view. Click on **Show all calendars**.

Related topics:

Creating resource calendars and resource calendar groups (p. 179)
Editing resource calendars (p. 181)
Creating appointments by using the resource calendar (p. 182)
Navigating within the folder structure (p. 291)

7.13.3 Editing resource calendars

The following options are available:

- rename a resource calendar group
- delete a resource calendar group
- delete a resource calendar

How to change a resource calendar group's name:

Note: The name of the default resource calendar group cannot be changed.

1. Click the **Folder-specific actions** icon ··· next to a resource calendar group in the folder view. Click on **Rename resource group**.

   The *Rename folder* window opens.
2. change the name

How to delete a resource calendar group:

1. Click the **Folder-specific actions** icon ··· next to a resource calendar group in the folder view.
2. Click on **Delete resource group**. Confirm the deletion.

How to delete a resource calendar:

Note: If you delete a resource calendar, it will be deleted in all resource calendar groups that contain that calendar.

1. Click the **Folder-specific actions** icon··· next to a resource calendar in the folder view.
2. Click on **Remove resource calendar**. Confirm the deletion.

Related topics:

Creating resource calendars and resource calendar groups (p. 179)
Displaying resource calendars (p. 180)
Creating appointments by using the resource calendar (p. 182)

7.13.4 Creating appointments by using the resource calendar

You can create an appointment by using a resource calendar. The resource calendar's resource will automatically be added to the appointment.

How to create an appointment by using the resource calendar:

1. Open a resource calendar group in the folder view. Enable the checkbox next to a resource calendar.
2. Select this resource calendar in the folder view.
3. To create the new appointment, click on **New appointment** or use drag and drop to select an area in the calender view.

By default, the appointment will be added to your personal calendar.

The appointment includes the resource of the selected resource calendar.

Related topics:

Creating Appointments (p. 147)
Creating resource calendars and resource calendar groups (p. 179)
Displaying resource calendars (p. 180)
Editing resource calendars (p. 181)

7.14 Searching for Appointments

Learn how to search for appointments:

- use search terms for title, location, description, participants
- If categories are available in your configuration, you can search for appointments with a specific category.
- limit the search to a specific time frame

You can use just one option or several options in any combination. All calendars will be searched.

How to search for appointments:

1. Enter a search term in the search field in the menu bar.
   The search menu opens. It shows filters for appointment data that can be searched for the search term.
2. Define the appointment data to be searched:
   - In order to search the title and location, click on **Contains** in the search menu. You can also press Enter.
     Appointment data that contain the search term will be searched.
   - In order to only search in specific appointment data, click on the respective filter in the search menu.
   - If participants match the search term, those participants will be suggested below the search field. To search for appointments that contain one of those contacts as participant, click on the contact.
3. You can use additional filters by clicking the **More search options** icon ⌵ in the search field. A window with search options opens.
   - To search for appointments with specific features, enter a search term in at least one input field.
   - To limit the search to appointments within a specific time frame, use **After** and **Before**.

   Click on **Search**.

The search results will be displayed in the list view.

The filters used are displayed below the search window. The following options are available:

- You can add filters and start a new search by clicking the **More search options** icon ⌵ in the search field.
- You can remove a filter and start a new search by clicking the **Remove filter** icon × next to the filter.

In order to finish the search, click the **Cancel search** icon × in the search field.

Related topics:

Displaying appointments in different views (p. 142)
Organising appointments with categories (p. 173)

7.15 Creating, Editing or Managing Appointments as Deputy

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

Learn how to act as another user's deputy [13]. Depending on the permissions granted by this user, you can do the following in the user's calendar:

- view appointments
- create new appointments on the user's behalf
- edit, manage or delete appointments on the user's behalf

How to create or edit appointments as deputy:

1. In the folder tree under **Shared calendars**, open the calendar of the user who appointed you as deputy.
2. Select **New appointment** from the tool bar.

   You will be asked whether you want to create the appointment as deputy of the shared calendar's owner. Click on **on behalf of the owner**.

The user will be informed by email that you created, edited or deleted an appointment on his behalf.

User interface:

The appointment editing window (p. 140)

Related topics:

Creating Appointments (p. 147)
Managing Appointments (p. 170)
Sending or Receiving Email Messages as Deputy (p. 122)
Managing Deputies (p. 305)

7.16 Using Groups

In case you frequently want to add the same people to appointments or tasks, you can create a group [14] consisting of those people. You can then add the group as a participant instead of adding individual people. The following options are available:

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

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

How to create a new group:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Groups** in the left pane.
   Click on **Create new group**.
3. Enter a group name in the *Create new group* window. Add members. The members are displayed below **Members**
   In order to remove a member, click the **Remove member** icon × next to the name.
   Click on **Create**.

How to edit a group:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Groups** in the left pane.
   Select a group. Click on **Edit**.
3. Edit the group's data in the *Edit group* window.
   Click on **Save**.

How to delete a group:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Groups** in the left pane.
   Select a group.
3. Click the **Delete** button.

Related topics:

Using Resources (p. 186)

7.17 Using Resources

Other than participant conflicts, resource [16] 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 configuration, those functions are not available for all users.

How to create a new resource:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Resources** in the left pane.
   Click on **Create new resource**.
3. Enter a resource name in the *Create new resource* window. You can enter a description.
   Define an E-Mail address for the resource.
   Click on **Create**.

How to edit a resource:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Resources** in the left pane.
   Select a resource. Click on **Edit**.
3. Edit the resource's data in the *Edit resource* window.
   Click on **Save**.

How to delete a resource:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Resources** in the left pane.
   Select a resource.
3. Click the **Delete** button.

Related topics:

Using Groups (p. 185)
Using Resource Calendars (p. 178)
Using Managed Resources (p. 187)

7.18 Using Managed Resources

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

In contrast to regular resources, a managed resource [15] will only be booked if a resource delegate confirms the booking. The following options are available:

- Creating managed resources (p. 188)
- Administrating managed resources as booking delegate (p. 189)

7.18.1 Creating managed resources

If a resource is not yet to be booked when adding it to an appointment, but only after a booking delegate accepts the booking, create this resource asmanaged resource.

How to create a managed resource:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Resources** in the left pane.
   Click on **Create new resource**. The *Create new resource* window opens.
3. Enter a resource name. You can enter a description.
   Define an E-Mail address for the resource.
4. Enable **Resource delegates manually accept or decline the booking request**.
   Below **Add delegates**, enter the email addresses of the users you want to designate as resource assignees.
   - Matching suggestions will be displayed during input. To accept a suggestion, click on it. To accept the first suggestion, press Enter.
   - To select contacts from an address book, click the **Select contact** icon on the right side of the input field.
5. Click on **Create**.

Subordinated actions:

Automatically Adding Contacts or Resources from an Address Book (p. 206)
Automatically Adding Contacts or Resources from the Address Directory (p. 207)

Related topics:

Administrating managed resources as booking delegate (p. 189)

7.18.2 Administrating managed resources as booking delegate

If you are a booking delegate, you will get the following notifications if a user creates an appointment with a managed resource:

- You will be informed about the booking request in the notification area.
- You will receive an email with a booking request.

You can respond to the booking request with **Accept**, **Maybe** or **Decline**. Each booking request will be added to the resource calendar like an appointment. There, you can edit the booking request later.

How to reply to a booking request:

1. Use one of the following methods:
   - Display an email with a booking request in the E-Mail application.
   - In the menu bar, click the **Notifications** icon. The info area opens. Booking requests for managed resources will be displayed below **Resource booking requests**.
     To view the booking request in the resource calendar, click on the date below the title.
2. Use one of the following methods:
   - To reply to the booking request without a comment, click on one of the buttons **Accept**, **Maybe**, **Decline**.
   - To reply to the booking request with a comment, click the **Add comment** icon ⋯.
     Select one of the options **Accept**, **Maybe**, **Decline** in the *Change confirmation* window. If required, enter a comment.

Result: If you accept the booking request, the resource will be shown as booked in the resource calendar. Users will be informed of the result of their booking request.

How to edit a managed resource:

1. Select a resource calendar in the folder view.
   Click on an appointment in a calendar view. A pop-up opens.
2. If a booking request has not yet been answered, a notification will be displayed at the top of the pop-up. Select the respective resource below **Resources**.
   Select one of the options **Accept**, **Maybe**, **Decline**. If required, enter a comment.
3. To change the booking confirmation of a resource, click on **Change confirmation** next to a resource below **Resources**.

Result: If you accept the booking request, the resource will be shown as booked in the resource calendar. Users will be informed of the result of their booking request.

Subordinated actions:

Automatically Adding Contacts or Resources from an Address Book (p. 206)
Automatically Adding Contacts or Resources from the Address Directory (p. 207)

Related topics:

Creating managed resources (p. 188)
Using Resource Calendars (p. 178)

7.19 Calendar Settings

How to open the Calendar settings:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Click on **Calendar** in the left pane.

The settings can be found in the following sections:

- Layout (p. 191)
- Your week (p. 191)
- Appointment reminders (p. 191)
- Additional time zones (p. 191)
- Jitsi meetings (p. 191)
- Zoom meetings (p. 191)
- Advanced settings (p. 192)

Also see: Searching for Settings (p. 38)

Layout

- **Time scale**
  Specifies the interval for dividing the time grid in the **Day**, **Work week**, and **Week** calendar views.

Your week

- **Working time**
  - **Start**
    Defines the start of working hours.
  - **End**
    Defines the end of working hours.
- **Work week**
  - **First day**
    Defines the beginning of a work week.
  - **Length**
    Defines the number of days of a work week.

  See Day, Work week, Week, Month or Year calendar view. (p. 135)

Appointment reminders

Defines default values for reminders when creating new appointments.

- Default reminder for normal appointments or recurring appointments
- Default reminder for all day appointments
- Default reminder for appointments in birthday calendar

To change a setting, click on the current setting. Change the current reminder in the *Edit reminders* window. You can add additional reminders.

Additional time zones

Allows you to add additional time zones that can be displayed in the calendar. See Managing favourite time zones (p. 172)

Jitsi meetings

With these options, you can define the behaviour if you select **Jitsi Meeting** in the **Conference** drop-down when creating appointments.

- **automatically copy link to location**
  Defines whether the link for the Jitsi meeting participation will be copied to the **Location** field.

See Creating an audio/video conference in the editing window (p. 150)

Zoom meetings

With those options, you can define the behaviour if you select **Zoom Meeting** in the **Conference** drop-down when creating appointments.

- **Appointments**
  - **Always add a random meeting password**
    Defines whether the conference will be secured by an automatically created password.
  - **automatically copy link to location**
    Defines whether the link for participating in the Zoom meeting will be copied to the **Location** field.
  - **copy dial-in information to description**
    Defines whether the link for participating in the Zoom meeting will be copied to the **Location** field.
- **Dial-in numbers**
  If you at least have a Zoom Pro account, Zoom offers dial-in numbers for different countries. To define the countries to be displayed in appointment invitations, click on **Open Zoom profile**.

See Creating an audio/video conference in the editing window (p. 150)

Advanced settings

- **Calendar**
  - **Show birthday calendar**
    Defines whether a birthday calendar is displayed in the folder view.
  - **Show declined appointments**
    Defines whether appointments that you declined are displayed. See Responding to Appointment Invitations (p. 160)
  - **Subscribe to shared calendars**
    See Subscribing to public and shared calendars (p. 167)
- **Appointments**
  - **Always mark "Participants can edit appointments" when creating or editing appointments**
    Defines whether participants by default get the permission to edit an appointment.
  - **Automatically mark all day appointments as "free" when creating or editing appointments**
    Defines whether all day appointments are displayed as free by default.
  - **use first category colour for appointments**
    Defines whether appointments to which you have assigned a category are displayed in the colour of that category. When assigning multiple categories to an appointment, the colour of the initially assigned category will be used. See Using Categories (p. 312)
- **Automatically apply appointment changes received via email to your calendar**
  Defines in which cases appointment invitations by external contacts will be automatically added to your calendar.
  - **Never**. The appointment change will not be applied automatically. The email invitation includes a button for adding the appointment to your calendar.
  - **Only from known senders**. The appointment change will be applied automatically if the appointment change comes from a sender who is entered as appointment participant or is entered as a contact in one of your address books.
  - **Always**. The appointment change will always be automatically added to your calendar.
- **Scheduling**
  Defines which users can view your appointments in the scheduling view. Also see Using the scheduling view (p. 157)

User interface:

The Calendar settings menu (p. 131)

Related topics:

How are appointments displayed in a calendar view? (p. 144)
Editing Appointments (p. 162)

Searching for Settings (p. 38)
Customised Settings (p. 37)

8 Address Book

Learn how to record, use and organise your contacts in the Address Book app.

How to launch the Address Book app:

Click the **All Applications** icon ≡ in the menu bar. Click on **Address Book** in the App Launcher.

Topics:

- The Address Book Components (p. 194)
- Displaying Contacts (p. 201)
- Viewing or Saving Contact Attachments (p. 205)
- Automatically Adding Contacts or Resources from an Address Book (p. 206)
- Automatically Adding Contacts or Resources from the Address Directory (p. 207)
- Adding Contacts (p. 208)
- Adding Distribution Lists (p. 210)
- Editing Contacts or Distribution Lists (p. 213)
- Calling Contacts (p. 214)
- Adding Address Books (p. 215)
- Managing Contacts (p. 219)
- Deleting Contacts (p. 225)
- Searching for Contacts (p. 226)
- Address Book Settings (p. 227)

8.1 The Address Book Components

Learn about the components of the Address Book app user interface and how to use them:

- The Address Book settings menu (p. 195)
- The New contact button (p. 195)
- The Address Book folder view (p. 196)
- The Address Book tool bar (p. 196)
- The Address Book navigation bar (p. 197)
- The Address Book list view (p. 197)
- The Address Book detail view (p. 198)
- The contact editing window (p. 199)
- The distribution list editing window (p. 200)

8.1.1 The Address Book settings menu

The **Settings** icon in the menu bar opens a menu with the following functions:

- Adjust all settings
- Select a theme for the user interface
- **List options**. Defines whether contact images, checkboxes or none of these elements will be displayed in the list view.
- Depending on the configuration: **Browse categories**. Shows all items that have been tagged with a specific category.
- subscribe to shared or other address books
- Depending on the configuration: **Connect your Device**. Launches a wizard for setting up local apps with which you can access your groupware data.

General description of the user interface:

The menu bar (p. 23)

Instructions:

Address Book Settings (p. 227)
Browsing categories (p. 314)
Subscribing to external address books (p. 216)
Subscribing to public and shared address books (p. 218)
Using a Wizard to Set Up Local Apps (p. 47)

8.1.2 The New contact button

Creates a new contact. If clicking the **More actions** icon, a menu with additional functions opens:

- new distribution list
- subscribe to shared or other address books
- new email, new appointment, new contact

Note: If the folder is closed, the button will be displayed as an icon. In this case, the **More actions** icon will not be available. To show the folder view, click the **Open folder view** icon on the bottom left side.

General description of the user interface:

The button for creating new objects (p. 26)

Instructions:

Adding Contacts (p. 208)
Adding Distribution Lists (p. 210)
Subscribing to external address books (p. 216)
Subscribing to public and shared address books (p. 218)

8.1.3 The Address Book folder view

Displays the address books.

If the folder view is closed, no address books will be displayed. To show the folder view, click the **Open folder view** icon ◫ on the bottom left side.

Content

- **My address books**. Contains your personal address books.
- **Public address books**. Contains address books that have been shared with all users. Depending on the configuration, those include the **All users** address book that contains all groupware users. Depending on the configuration, this address book can have a different name, e.g. **Internal users** or **Global address book**.
- **Shared address books**. Contains address books shared with you by other users.

Depending on the configuration, public address books and shared address books might not be available.

General description of the user interface:

The folder view (p. 27)

Related topics:

Adding Address Books (p. 215)
Managing Contacts (p. 219)
Managing Data with Folders (p. 288)
Sharing Data (p. 294)

8.1.4 The Address Book tool bar

Contains functions for editing and organising contacts. Notes:

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

Content

- **Edit** icon ✎. Edits the contact's data.
- **Send email** icon ✉. Sends an email to the contact.
- **Invite to appointment** icon 📅. Invites the contact to an appointment.
- **Delete** icon 🗑. Deletes the contacts selected by you.
- **More actions** icon ⋯. Opens a menu with functions for managing contacts.

General description of the user interface:

The tool bar (p. 28)

Instructions:

Editing Contacts or Distribution Lists (p. 213)
Sending Email Messages from within an address book (p. 220)
Inviting contacts to an appointment (p. 220)
Deleting Contacts (p. 225)
Sending contacts as vCard (p. 222)
Moving or copying contacts (p. 222)
Printing contacts (p. 224)
Exporting contacts (p. 224)

8.1.5 The Address Book navigation bar

Contains letters in alphabetical order. If clicking on a letter, contacts with this initial letter will be shown in the list view.

Related topics:

Displaying an address book’s contacts (p. 202)

8.1.6 The Address Book list view

Displays a list of contacts in the opened address book.

Content

- The name of the selected address book.
  The number of contacts in this address book.
- **More actions** icon ···. Opens a menu with functions for selection or sorting the selected address book's contacts.
- The following details are displayed for each contact:
  - a picture if uploaded
  - last name, first name
  - business data, if entered

  Names that start with a figure or a special character are displayed below **#** at the top of the list view. Names that start with a special sign are displayed below **Ω** at the bottom of the list view.

To change the list view layout, use the entries below **List options** in the **Settings** menu ⚙.

General description of the user interface:

The list view (p. 30)

Related topics:

Displaying an address book’s contacts (p. 202)

8.1.7 The Address Book detail view

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

Content

- a contact picture, if uploaded
  last name, first name
  if entered: title, business information, residence
- Depending on the configuration: the categories assigned
  Clicking a category searches for contacts assigned to that category.
- Depending on the configuration: the contact's current availability for calls
- Depending on the configuration: icons for communicating with the contact:
  - **Email** ✉. Opens the window for composing an email.
  - **Call** ✆. Opens a menu with functions for calling.
  - **Invite** 📅. Opens the window for creating an appointment.
- Further contact data, if set:
  - Title, additional names, additional personal data
  - Business data
  - Email addresses
    If clicking on an email address, the page for sending a new email is displayed.
  - Instant Messenger data
  - Business and private phone numbers
    If clicking on a number, a function for making a call opens, if available.
  - Business and private fax numbers
  - Private address, business address, other address
    In the **Names & Addresses** section of the address book settings, you can define whether a map service link for showing an address should be displayed.
  - A note
  - Maximum 18 optional user fields
  - Attachments

General description of the user interface:

The detail view (p. 31)

Related topics:

Displaying an address book’s contacts (p. 202)

8.1.8 The contact editing window

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

In order to open the window, do one of the following:
- Click on **New contact**.
- Select a contact. Click the **Edit** icon in the tool bar.

Content

- A contact picture, if uploaded. Click on the contact picture to edit it or to upload a new contact picture.
  last name, first name
  if entered: title, business information, residence
- Personal info
  - **First name**, **Last name**
  - ⊕**Add personal info**: e.g. title, additional names, date of birth
- Business info
  - **Company**, **Department**
  - ⊕**Add business info**: e.g. position, profession, manager
- Communication
  - **E-mail 1**, **Cell phone**
  - ⊕**Add email, phone, fax**: Email, messenger, mobile phone, phone, fax
- ⊕**Add postal address**. Private address, business address, other address
- If you added fields: If clicking the **Remove field** icon ⊖, an additional field and its data will be deleted.
- **Categories**. Allows you to add or edit categories.
  Note: Depending on the configuration, this function might not be available.
- **Note** input field
- ⊕**Add user fields**. You can add up to 18 fields.
- **Add attachment**. Adds files.

General description of the user interface:

The editing window (p. 34)

Related topics:

Adding Contacts (p. 208)
Editing Contacts or Distribution Lists (p. 213)

8.1.9 The distribution list editing window

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

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

- Click the **More actions** icon next to **New contact**. Click on **New distribution list**.
- Select a distribution list. Click the **Edit** icon in the tool bar.

Content

- input field for the name of the new distribution list
- input field for the email addresses of the distribution list's contacts

General description of the user interface:

The editing window (p. 34)

Related topics:

Creating new distribution lists (p. 211)
Editing Contacts or Distribution Lists (p. 213)

8.2 Displaying Contacts

Learn how to select contacts from different address books and display their data. Depending on the configuration, the following options are available:

- Displaying an address book's contacts (p. 202)
- Displaying contacts in the address list (p. 203)
- Displaying contacts in the halo view (p. 204)

Related topics:

Automatically Adding Contacts or Resources from an Address Book (p. 206)
Automatically Adding Contacts or Resources from the Address Directory (p. 207)

8.2.1 Displaying an address book’s contacts

In the folder view, you can open an address book, select specific contacts or display their data.

How to display a contact:

1. Select an address book in the folder view.
   Your personal address book named **Contacts** can be found in the folder view below **My address books**.
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 view. The contact's data is displayed in the detail view.

Options:

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

User interface:

The Address Book navigation bar (p. 197)
The Address Book detail view (p. 198)
The Address Book list view (p. 197)

Related topics:

Displaying contacts in the address list (p. 203)
Viewing or Saving Contact Attachments (p. 205)
Displaying contacts in the halo view (p. 204)
Searching for Contacts (p. 226)

8.2.2 Displaying contacts in the address list

Note: Depending on the configuration, the address directory might not be available.

In the address list, you can simultaneously find and display contacts from multiple address books. You can define the address books to be searched for contacts. The following functions are available:

- search for the name, department, position, phone number, email address
- set a filter for defining the address books to be displayed and selected for the search
- select the address books to be searched

How to display contacts in the address directory:

1. Click the **All Applications** icon ≡ in the menu bar.
   Click on **Address list** in the App Launcher.
   The *Global address list* window opens. Like editing windows, the window can be moved, minimised and its size can be adjusted.
2. Enter a search term in **Search**.
   All contacts that include the search term in the following data will be displayed: name, department, position, phone number, email address
3. You can limit the search result by using the following functions:
   - Enter a term in **Filter** to define the address books to be displayed in **Address list**.
   - In **Address list**, select the address books to be searched.
4. To show a contact’s details, click the **Show contact details** icon on the right-hand side. The contact's Halo View will be displayed in a pop-up.

User interface:

The editing window (p. 34)

Related topics:

Displaying an address book’s contacts (p. 202)
Displaying contacts in the halo view (p. 204)

8.2.3 Displaying contacts in the halo view

You can use the halo view in the E-Mail, Calendar or Tasks app to display all relevant information about a contact.

How to display a contact in the halo view:

1. Depending on the app, use one of the following methods:
   - Select an email in the E-Mail app. Click on a recipient or the sender in the 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.

   Depending on the contact's entries in the address book, this data will be displayed in a pop-up:
   - a picture if uploaded
   - last name, first name
   - business data, if entered
   - Depending on the configuration: the contact's current availability for calls
   - Depending on the configuration: icons for communicating with the contact:
     - **Email** ✉. Opens the window for composing an email.
     - **Call** ✆. Opens a menu with functions for calling.
     - **Invite** ⊞. Opens the window for creating an appointment.
   - Further contact data, if set:
     - Personal data, business data
     - E-Mail addresses. If clicking on an E-Mail address, the page for sending a new E-Mail is displayed.
     - Business and private phone numbers. If clicking on a number, a function for making a call opens, if available.
     - Business and private addresses. In the **Names & Addresses** section of the address book settings, you can define whether a map service for displaying the address should be used when clicking on an address.
     - Attachments
   - The address book in which the contact is saved
   - Your recent conversations with this contact If clicking on an E-Mail, its content will be displayed in a pop-up.
   - Shared appointments with this contact. If clicking on an appointment, its data is shown in a pop-up.
2. To close the halo view, click the **Close** icon × in the pop-up.

General description of the user interface:

The pop-up (p. 32)

Related topics:

The E-Mail pop-up (p. 74)
The Calendar detail view (p. 138)
The Tasks detail view (p. 233)
Displaying an address book’s contacts (p. 202)
Displaying contacts in the address list (p. 203)

8.3 Viewing or Saving Contact Attachments

Learn how to view, read or download contact attachments.

The following functions are available:

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

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

How to use the contact attachment functions:

1. Select a contact with an attachment.
2. Click on an attachment's name in the detail view. Click on the function wanted.
   If there are several attachments, an action can be executed for all attachments at once. To do so, click on **All attachments**.

Note: Depending on the configuration, attachments will be checked for viruses before being downloaded.

- If no virus is found, the attachments will be downloaded without any further notification.
- If a virus scan was not possible or a virus was found, a window with a respective warning opens. In this case you can cancel the download.

User interface:

The Address Book detail view (p. 198)

Related topics:

Displaying an address book’s contacts (p. 202)

8.4 Automatically Adding Contacts or Resources from an Address Book

Note: Depending on the configuration, the window described below might not be available. In case the window is not available, the global address list will be used, see Automatically Adding Contacts or Resources from the Address Directory (p. 207).

In the *Select contacts* window, you can search address books for contacts and resources and auto-fill an input field with the related email addresses.

How to automatically add email addresses from an address book:

1. Click the **Select contacts** icon in an editing window.

   This icon will be available in the input fields for email addresses, while:

   - selecting the recipients when sending an email
   - adding participants or resources to an appointment
   - adding participants to a task
   - inviting people to a share

   The *Select contacts* window opens.
2. The following options are available for finding a specific contact, distribution list or resource:
   - Enter a name in **Search**.
   - To view the contacts of a specific address book, click on **All address books**. Select an address book from the list. Depending on the configuration, you can select a department from the list.
   - To only view resources, click on **All address books**. Select **All resources**.
3. Select at least one object. The selected items will be displayed below the list. To undo the selection, click on **Clear selection**.

   You can also use your system's multi-selection functions.
4. If required, repeat steps 2 to 3 to find and select additional objects.
5. To automatically insert the email addresses of the objects selected, click on **Select**.

User interface:

The editing window (p. 34)

Superordinate actions:

Sending Email Messages (p. 79)
Adding participants or resources when creating an appointment (p. 154)
Using the scheduling view (p. 157)
Creating managed resources (p. 188)
Creating new distribution lists (p. 211)
Adding participants when creating a task (p. 238)
Sharing data (p. 295)

Related topics:

Displaying Contacts (p. 201)

8.5 Automatically Adding Contacts or Resources from the Address Directory

Note: Depending on the configuration, the address directory might not be available. In the latter case, the *Select contacts* window will be used, see Automatically Adding Contacts or Resources from an Address Book (p. 206).

In the *Global address list* window, you can use various functions for finding contacts and resources and auto-fill an input field with the related email addresses. The following functions are available:

- search for the name, department, position, phone number, email address
- set a filter for defining the address lists to be displayed and selected
- select the address list to be searched

How to automatically add a contact's or resource's email address from the address directory:

1. Click the **Select contacts** icon in an editing window.
   This icon will be available in the input fields for email addresses, while:
   - selecting the recipients when sending an email
   - adding participants to an appointment or task
   - inviting people to a share

   The *Global address list* window opens.
2. Enter a search term in **Search**.
   All contacts and resources that include the search term in the following data will be displayed: name, department, position, phone number, email address. All distribution lists and resources with a name or email address that includes the search term, will be displayed.
3. You can limit the search result by using the following functions:
   - Enter a term in **Filter** to define the address lists to be displayed in **Address list**.
   - In **Address list**, select the address list to be searched
     To only search for resources, select **Resources** from the **Address list** entries.
4. Select at least one object.
   The selected contacts, distribution lists and resources will be displayed in a selection list at the bottom. You can remove single objects from the list.
5. If required, repeat steps 2 to 4 to find and select additional objects.
6. To automatically insert the email addresses of the objects selected, click on **Select**.

Superordinate actions:

Sending Email Messages (p. 79)
Adding participants or resources when creating an appointment (p. 154)
Using the scheduling view (p. 157)
Creating managed resources (p. 188)
Creating new distribution lists (p. 211)
Adding participants when creating a task (p. 238)
Sharing data (p. 295)

Related topics:

Displaying Contacts (p. 201)

8.6 Adding Contacts

Learn how to create a new contact and how to add a contact from a vCard attachment.

How to create a new contact:

1. In the folder view, open an address book for which you have the permission to create objects.
2. Click on **New contact**.

   If you work in another app and you do not want to leave that app, you can use the **More actions** icon ⌄ in the button for creating objects.
3. Enter the data.
4. Click on **Save**.

Options:

- To add a contact picture, click on the empty contact picture. The *Edit image* window opens.
  - To upload an existing picture, click on **Upload a photo**.
  - To make a new picture with the device camera, click the **Take photo** icon.
  - You can adjust the image section with the zoom and by moving or rotating the photo.

  Click on **Apply**. The photo will be inserted.
- In order to edit or delete a picture, click on the picture.
- Depending on the configuration, you can assign a category to the contact. To do so, click on **Add category** next to **Categories**. Select an existing category or create a new one.
  In order to remove a category, click the **Remove category** icon × next to the category.
- To add additional input fields, click on those elements:

  ⊕ **Add personal info**

  ⊕ **Add business info**

  ⊕ **Add e-mail, phone, fax**

  ⊕ **Add postal address**
- To remove an additional input field and its data, click on **Remove field** ⊖ next to the input field.

User interface:

The contact editing window (p. 199)

Subordinated actions:

Adding attachments when creating a contact (p. 209)

Related topics:

Adding a contact from a vCard attachment (p. 209)
Collecting addresses (p. 101)
Importing contacts (p. 223)
Adding Distribution Lists (p. 210)

8.6.1 Adding attachments when creating a contact

Depending on the configuration, you can attach files that are saved on your computer or in the Drive app.

How to add attachments in the contact editing window:

1. Select the files to be sent as attachments:
   - To send a local file as attachment, click on **Add attachment** next to **Attachments**.
     You can also drag one or several local files from a file browser or the desktop to the contact editing window.
   - In order to send the current version of a file from the Drive app as an attachment, click on **Add from Drive** next to **Attachments**.
     Note: Depending on the configuration, this function might not be available.
2. In order to remove an attachment, click the **Remove attachment** icon ⊖ next to the attachment.

Superordinated action:

Adding Contacts (p. 208)
Editing Contacts or Distribution Lists (p. 213)

8.6.2 Adding a contact from a vCard attachment

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

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

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

Related topics:

Adding Contacts (p. 208)
Adding Distribution Lists (p. 210)

8.7 Adding Distribution Lists

Learn how to create distribution lists [13]. Distribution lists can be used to send email messages, appointment invitations or shared items to a number of people by entering the name of the distribution list instead of each person's email address.

The following options are available:

- Creating new distribution lists (p. 211)
- Saving E-Mail recipients as distribution list (p. 212)
- Creating a distribution list from a list of participants (p. 212)

Related topics:

Adding Contacts (p. 208)

8.7.1 Creating new distribution lists

In order to create a new distribution list, enter a name and add contacts. You can add internal users or external contacts.

How to create a new distribution list:

1. In the folder view, open an address book for which you have the permission to create objects.
2. Click the **More actions** icon next to **New contact**. Click on **New 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.
   - Matching suggestions will be displayed during input. To accept a suggestion, click on it. To accept the first suggestion, press Enter.
   - To select contacts from an address book, click the **Select contact** icon on the right side of the input field.

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

User interface:

The distribution list editing window (p. 200)

Subordinated actions:

Automatically Adding Contacts or Resources from an Address Book (p. 206)
Automatically Adding Contacts or Resources from the Address Directory (p. 207)

Related topics:

Saving E-Mail recipients as distribution list (p. 212)
Creating a distribution list from a list of participants (p. 212)
Adding Contacts (p. 208)

8.7.2 Saving E-Mail recipients as distribution list

You can save the recipients of an email sent or received as new distribution list.

How to save the recipients of an E-Mail as a distribution list:

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

Related topics:

Creating new distribution lists (p. 211)
Creating a distribution list from a list of participants (p. 212)

8.7.3 Creating a distribution list from a list of participants

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

1. Depending on the selected view, the following options are available in the Calendar:
   - In a calendar view, click on an appointment with multiple participants. Click the **More actions** icon ··· in the pop-up.
   - In the list view, select an appointment with multiple participants. Click the **More actions** icon ··· in the tool bar.

   Click on **Save as distribution list**.
2. Complete the details for creating the distribution list.

Related topics:

Creating new distribution lists (p. 211)
Saving E-Mail recipients as distribution list (p. 212)

8.8 Editing Contacts or Distribution Lists

Learn how to edit the data of contacts or distribution lists later.

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

Note: Contacts in address book subscriptions cannot be edited.

How to edit a contact or distribution list:

1. Select a contact or a distribution list from the list view.
2. Click the **Edit** icon in the tool bar. The data will be displayed.
3. Edit the data.
4. Click on **Save**.

User interface:

The Address Book tool bar (p. 196)
The contact editing window (p. 199)
The distribution list editing window (p. 200)

Related topics:

Adding Contacts (p. 208)
Creating new distribution lists (p. 211)
Using Categories (p. 312)

Subordinated actions:

Adding attachments when creating a contact (p. 209)

8.9 Calling Contacts

Learn how to call a contact by contacting the contact via audio or video conference or phone.

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

Prerequisite:

- You have set up an account with an audio or video conference provider.
- Your computer has been configured to allow you to make phone calls over the Internet.

How to call a contact:

1. Select a contact from the list view.
   In the detail view, an icon below the name indicates the contact's presence status.
2. Click on **Call** in the detail view. Use one of the following methods:
   - In the menu, click on an audio or video conference provider. The window for calling the contact opens. Click on **Call**.
   - Select a phone number from the menu.

You can also call a contact in the halo view.

User interface:

The Address Book detail view (p. 198)

Related topics:

Displaying contacts in the halo view (p. 204)
Calling the Sender or Another Recipient (p. 96)
Calling Appointment Participants (p. 164)
Calling Task Participants (p. 242)
Creating an audio/video conference in the editing window (p. 150)
Setting the Presence Status (p. 48)

8.10 Adding Address Books

With address books you can organise your contacts e.g. by separately saving them as business or private contacts. Learn how to create address books, use contacts from external address books and set the view for shared address books.

The following options are available:

- Adding personal address books (p. 216)
- Subscribing to external address books (p. 216)
- Refreshing and managing address book subscriptions (p. 217)
- Subscribing to public and shared address books (p. 218)

Related topics:

Managing Contacts (p. 219)
Managing Data with Folders (p. 288)

8.10.1 Adding personal address books

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

How to create a new personal address book:

1. Click the **Folder-specific actions** icon + next to **My address books** in the folder view. Click on **Add new address book**.
2. Enter a name. In case the new address book should be a public address book, enable **Add as public folder**.
3. Click on **Add**.

User interface:

The Address Book folder view (p. 196)

Related topics:

Subscribing to external address books (p. 216)
Moving or copying contacts (p. 222)
Managing Data with Folders (p. 288)
What are folder types? (p. 289)

8.10.2 Subscribing to external address books

You can use your contacts from other providers within the groupware by subscribing to your external address books.

Notes:

- You can sync changes from the external address book by refreshing the subscribed address book.
- You cannot create or edit contacts in the subscribed address book.

How to subscribe to external address books:

1. Click the **More actions** icon next to **New contact**. Click on **Subscribe address book**.
   You can also click the **Settings** icon in the menu bar. Click on **Subscribe address book**.
   The *Subscribe to address book* window opens.
2. Click one of the icons.
3. Depending on the data source, the next procedure varies.
   - For some data sources, a new browser window opens. Log in with your credentials to grant access to the address data.
   - If the provider asks you for the permission to access the data, grant this permission.
   - For some data sources, you have to enter your credentials for the data source in the *Subscribe to address book* window.

Tip: A subscribed address book is marked with the **Subscriptions** icon. If clicking the icon, the subscription settings will be opened.

User interface:

The New contact button (p. 195)
The Address Book settings menu (p. 195)

Related topics:

Adding personal address books (p. 216)
Refreshing and managing address book subscriptions (p. 217)

8.10.3 Refreshing and managing address book subscriptions

The following options are available:

- refresh an address book subscription
- show all subscriptions
- disable or enable a subscription
- remove a subscription

How to manage address book subscriptions:

1. Click the **Settings** icon in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Accounts** in the left pane.
   Click on **Subscriptions** in the right pane.
3. Use the following methods:
   - To refresh an address book subscription, click on **Refresh** next to a subscription.
   - To show the folder with the data you have subscribed to, click on the navigation path below the subscription's name.
     To only display this information for a specific folder, click the **Subscriptions** icon next to a folder with subscriptions, in the folder view.
   - To disable or enable a subscription, click on **Disable** or **Enable** next to a subscription.
   - To remove a subscription, click the **Delete** icon × next to a subscription.

Related topics:

Subscribing to external address books (p. 216)
Managing Accounts (p. 308)

8.10.4 Subscribing to public and shared address books

Address books that are public or shared by other users can be used as follows:

- You can define which public and shared address books are displayed in the folder view by subscribing to such address books.
  This helps you to keep a better overview if there are many public and shared address books in your groupware environment.
- If you subscribed to such an address book, you can set whether this address book will be synchronised with other clients, e.g. with your smartphone.
- If you no longer need such an address book, you can cancel the subscription.

How to define the address books to which you want to subscribe and which are to be synchronised:

1. Click the **More actions** icon next to **New contact**. Click on **Subscribe shared address books**.
   You can also use one of the following methods:
   - Click the **Settings** icon in the menu bar. Click on **Subscribe shared address books**.
   - In the **Advanced settings** section of the address book settings, use the **Subscribe to shared address books** button.

   A window opens. It shows your private, the public and shared address books.
2. If you want an address book to be displayed, enable the **Subscribe to address book** button.
   To define that a displayed address book is synchronised, enable the **Synchronise via DAV** checkbox.
3. If you no longer want an address book to be displayed and synchronised, disable the **Subscribe to address book** button.

User interface:

The New contact button (p. 195)
The Address Book settings menu (p. 195)

Related topics:

Accessing other users' shares (p. 300)
Downloading Personal Data (p. 315)
Address Book Settings (p. 227)

8.11 Managing Contacts

Learn how to organise your contacts and about the contact actions available:

- Sending Email Messages from within an address book (p. 220)
- Inviting contacts to an appointment (p. 220)
- Organising contacts with categories (p. 221)
- Moving or copying contacts (p. 222)
- Sending contacts as vCard (p. 222)
- Importing contacts (p. 223)
- Exporting contacts (p. 224)
- Printing contacts (p. 224)

Related topics:

Adding Address Books (p. 215)

8.11.1 Sending Email Messages from within an address book

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

Note: This function is only available if the contact’s data contains an email address.

How to send an Email from within an address book:

1. Select at least one contact or distribution list in the list view.
2. Click the **Send email** icon ✉ in the tool bar.
   If you have selected a single contact, you can also click the **Email** icon ✉ in the detail view.
3. Fill in the details for sending the E-Mail.

Related topics:

Sending Email Messages (p. 79)

8.11.2 Inviting contacts to an appointment

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

Note: This function is only available if the contact’s data contains an email address.

How to invite contacts to an appointment:

1. Select at least one contact or distribution list in the list view.
2. Click the **Invite to appointment** icon in the tool bar.
   If you have selected a single contact, you can also click the **Invite** icon in the detail view.
3. Complete the details for creating the appointment.

Related topics:

Creating Appointments (p. 147)

8.11.3 Organising contacts with categories

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

To organise contacts independently from folders, you can use categories.

- You can mark contacts with categories.
- You can display all contacts that have been marked with a specific category.

You can create, edit or delete your own categories, see Managing categories (p. 313).

How to mark contacts with a category:

1. Select a contact. Click the **Edit contact** icon in the tool bar.
   The contact editing window opens.
2. To do so, click on **Add category** next to **Categories**. Select a category.
   In order to remove a category from the contact, click the **Remove category** icon × next to the category.

How to display contacts that have been marked with a specific category:

1. Select a contact that has been marked with a category.
2. Click on the category in the detail view.

Result:

- The list view shows all contacts that have been marked with this category.
- To display the previous list, click the **Cancel search** icon × in the search field.

Options:

- You can also search for contacts with a specific category.
- To show all objects that have been marked with a specific category, you can browse the categories.

Related topics:

Managing categories (p. 313)
Browsing categories (p. 314)
Searching for Contacts (p. 226)
Organising email messages with categories (p. 102)
Organising appointments with categories (p. 173)
Organising tasks with categories (p. 247)

8.11.4 Moving or copying contacts

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

Notes:

- You cannot move or copy contacts or distribution lists to the **All users** address book.
- You cannot move contacts from the **All users** address book.

How to move or copy contacts to another address book:

1. Select at least one contact or distribution list in the list view.
2. Click the **More actions** icon ··· in the tool bar. Click on **Move** or **Copy**.
   A window opens.
3. Select an address book. You can create a new address book by clicking on **Create folder**.
   Click on **Move** or **Copy**.

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

Related topics:

Adding personal address books (p. 216)

8.11.5 Sending contacts as vCard

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

How to send a contact as a vCard attachment:

1. Select at least one contact or distribution list in the list view.
2. Click the **More actions** icon ··· in the tool bar. Click on **Send as vCard**.
3. Fill in the details for sending the E-Mail.

Related topics:

Exporting contacts (p. 224)
Sending Email Messages (p. 79)

8.11.6 Importing contacts

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

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

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

Note: You cannot import contacts into address book subscriptions.

How to import contacts from a file:

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

Related topics:

Exporting contacts (p. 224)
Adding Contacts (p. 208)

8.11.7 Exporting contacts

You can export contacts or distribution lists to these formats:

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

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

How to export single contacts or distribution lists:

1. Select at least one contact or distribution list in the list view.
2. Click the **More actions** icon ··· in the tool bar. Click on **Export**. The *Export selected* window opens.
3. Select a format.
   To export contacts and distribution lists, enable **With distribution lists**.
4. Click on **Export**.

Result: The vCard or CSV file with the contacts exported will be created in the download folder.

How to export all contacts from an address book:

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

Result: The vCard or CSV file with the contacts exported will be created in the download folder.

Related topics:

Sending contacts as vCard (p. 222)
Importing contacts (p. 223)
Downloading Personal Data (p. 315)

8.11.8 Printing contacts

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

How to print a contact's data:

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

8.12 Deleting Contacts

Warning: Deleted contacts and distribution lists **cannot** be restored.

You can delete contacts or distribution lists from an address book if you have the permission to delete items from this address book.

- You cannot delete contacts from the **All users** address book.
- If you delete a distribution list, the distribution list's contacts are kept.

How to delete contacts:

1. Select at least one contact or distribution list in the list view.
2. Click the **Delete** icon in the tool bar.
3. Confirm that you want to delete the items.

8.13 Searching for Contacts

Learn how to search for contacts:

- Using search terms for the following data:
  - Name: First name, last name, suffix, nickname
  - Email address, phone number
  - Business data: Company, department, position
  - All address data
  - Notes
- If categories are available in your configuration, you can search for contacts with a specific category.

You can use just one single search term or use them in any combination. All address books will be searched.

How to search for contacts:

1. Enter a search term in the search field in the menu bar.
   The search menu opens. It shows the contact data that will be searched for the search term.
2. Use one of the following methods:
   - In order to search the contact data, click on **Contains** in the search menu. You can also press Enter.
     It will be searched for contact data that contain the search term.
   - In order to only search in specific contact data, click on the respective filter in the search menu.
   - Contacts whose first or last name starts with the search term and who have an email address will be suggested below the search field. To view one of those contacts, click on the contact.
3. You can use additional filters by clicking the **More search options** icon ⌵ in the search field. A window with search options opens.
   Enter a search term on at least one input field. It will be searched for contact data that contain the search term.
   Click on **Search**.

The search results will be displayed in the list view.

The filters used are displayed below the search window. The following options are available:

- You can add filters and start a new search by clicking the **More search options** icon ⌵ in the search field.
- You can remove a filter and start a new search by clicking the **Remove filter** icon × next to the filter.

In order to finish the search, click the **Cancel search** icon × in the search field.

Related topics:

Displaying an address book’s contacts (p. 202)
Organising contacts with categories (p. 221)

8.14 Address Book Settings

How to use the address book settings:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Click on **Address Book** in the left pane.

The settings can be found in the following sections:

- Names & Addresses (p. 228)
- Advanced settings (p. 228)

Also see: Searching for Settings (p. 38)

Names & Addresses

- **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.

Advanced settings

- **Start in “All users” address book**

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

- **Subscribing to shared address books**
  See Subscribing to public and shared address books (p. 218)

User interface:

The Address Book settings menu (p. 195)

Related topics:

Displaying an address book’s contacts (p. 202)
Searching for Settings (p. 38)
Customised Settings (p. 37)

9 Tasks

Learn how to schedule, track and organise your tasks in the Tasks app.

How to start the Tasks app:

Click the **All Applications** icon ≡ in the menu bar. Click on **Tasks** in the App Launcher.

Topics:

- The Tasks Components (p. 230)
- Viewing Tasks (p. 235)
- Viewing or Saving Task Attachments (p. 236)
- Creating Tasks (p. 237)
- Responding to Task Invitations (p. 240)
- Editing Tasks (p. 241)
- Calling Task Participants (p. 242)
- Adding Task Lists (p. 243)
- Managing Tasks (p. 245)
- Deleting Tasks (p. 251)
- Searching for Tasks (p. 252)

9.1 The Tasks Components

Learn about the components of the Tasks app user interface and how to use them:

- The Tasks settings menu (p. 231)
- The New task button (p. 231)
- The Tasks folder view (p. 231)
- The Tasks tool bar (p. 232)
- The Tasks list view (p. 232)
- The Tasks detail view (p. 233)
- The editing window (p. 234)

9.1.1 The Tasks settings menu

The **Settings** icon ⚙ in the menu bar opens a menu with the following functions:

- Adjust all settings
- Select a theme for the user interface
- **List options**. Defines whether there will be checkboxes displayed in the list view.
- Depending on the configuration: **Browse categories**. Shows all objects that have been marked with a specific category.
- Subscribe to shared task folders
- Depending on the configuration: **Connect your Device**. Launches a wizard for setting up local apps with which you can access your groupware data.

General description of the user interface:

The menu bar (p. 23)

Instructions:

Browsing categories (p. 314)
Subscribing to public and shared task lists (p. 244)
Using a Wizard to Set Up Local Apps (p. 47)

9.1.2 The New task button

Creates a new task. If clicking the **More actions** icon ⌵, a menu with additional functions opens:

- Subscribe to shared task folders
- New email, New appointment, New contact

Note: If the folder is closed, the button will be displayed as an icon. In this case, the **More actions** icon will not be available. To show the folder view, click the **Open folder view** icon ◫ on the bottom left side.

General description of the user interface:

The button for creating new objects (p. 26)

Instructions:

Creating Tasks (p. 237)
Subscribing to public and shared task lists (p. 244)

9.1.3 The Tasks folder view

Shows the task lists.

If the folder view is closed, no task lists will be displayed. To show the folder view, click the **Open folder view** icon ◫ on the bottom left side.

Content

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

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

General description of the user interface:

The folder view (p. 27)

Related topics:

Adding Task Lists (p. 243)
Managing Tasks (p. 245)
Managing Data with Folders (p. 288)
Sharing Data (p. 294)

9.1.4 The Tasks tool bar

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

Content

- **Edit** icon ✎. Edits a task's data.
- **Due** icon 🕒. Changes a task's due date.
- **Undone** ▹ or **Done** ✓ icon. Marks a task as done or undone.
- **Delete** icon 🗑. Deletes the tasks selected by you.
- **More actions** icon ···. Opens a menu with functions for managing tasks.

General description of the user interface:

The tool bar (p. 28)

Instructions:

Editing Tasks (p. 241)
Changing a task's due date (p. 246)
Marking tasks as done (p. 246)
Deleting Tasks (p. 251)
Exporting tasks (p. 249)
Printing tasks (p. 250)
Moving tasks to another folder (p. 248)

9.1.5 The Tasks list view

Shows the tasks of the current task list.

Content

- The name of the selected folder.
  The number of tasks in this task list.
- **More actions** icon ···. Opens a menu with functions for selecting or sorting the tasks in the task list selected.
- The following details are displayed for each task: subject, status or due date, and the progress.

General description of the user interface:

The list view (p. 30)

Related topics:

Viewing Tasks (p. 235)

9.1.6 The Tasks detail view

Shows the data of the task that you selected in the list view. If double-clicking on the task in the list view, the data will be displayed in a window.

Content

- If set:
  - the **Private** icon for tasks marked as private
  - An icon for the task's priority
- The task's subject
- The task's reminder date, if set
- Depending on the configuration: the categories assigned
  Clicking on a category searches for tasks to which that category has been assigned.
- If the task is a recurring task, recurrence parameters will be displayed.
- The editing status
  The progress in percentage
- Further task data, if set:
  - due date
  - start date
  - definition
  - billing information
  - Attachments
  - the names of the participants
    If clicking on a name, a pop-up opens. It displays the participant's **Halo View**.

General description of the user interface:

The detail view (p. 31)

Related topics:

Viewing Tasks (p. 235)

9.1.7 The editing window

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

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

- Click on **New task**.
- Select a task. Click the **Edit** icon in the tool bar.

Content

- Task data
  - **Subject**, **Description** input fields. The subject is displayed as task title. A description can be entered optionally.
  - **Expand form**. Displays additional input fields.
  - **Start date** and **Due date**. Defines the start and the due date. Clicking on it opens the date picker. If **All day** is disabled, you can set start and due times.
  - **All day**. Defines whether the task is supposed to last whole days.
  - **Repeat**. Defines whether the task is to be repeated.
- **Reminder**. Defines when and how you will be reminded about the task's due date. You can also set a date and time for the reminder in **Reminder date**. In this case, **Manual input** will be pre-selected in the **Reminder** field.
- Task view
  - **Status**. Defines the task's status. You can also enter a percentage value for the task completion in **Progress**.
  - **Priority**. Defines the task's priority.
  - **Private**. Enable this checkbox if other users are not to see the task's subject and description.
  - **Categories**. Allows you to add or edit categories.
    Note: Depending on the configuration, this function might not be available.
- **Add contact** input field. Enter the names of the participants that are to take part in the task in this field.
  Select contacts icon. Opens a window for selecting contacts from a list.
- **Add attachments**. Adds files.
- **Show details**. Displays additional data fields where you can enter billing details like estimated efforts, actual efforts or billing information.

General description of the user interface:

The editing window (p. 34)

Related topics:

Creating Tasks (p. 237)
Editing Tasks (p. 241)

9.2 Viewing Tasks

There are different possibilities for displaying the tasks in a task list:

How to display a task:

1. Open a task list in the folder view.
2. Click on a task in the list view. The task's data is displayed in the detail view.

Options:

- To sort the task list or to only display unfinished tasks, use the **More options** menu ⋯ above the list view.
- You can open the task in a window by double-clicking on the task in the list view.

User interface:

The Tasks detail view (p. 233)
The Tasks list view (p. 232)

Related topics:

Viewing or Saving Task Attachments (p. 236)
Searching for Tasks (p. 252)

9.3 Viewing or Saving Task Attachments

Learn how to view, read or download task attachments.

The following functions are available:

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

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

How to use the task attachment functions:

1. Select a task with an attachment.
2. Click on an attachment's name in the detail view. Click on the function wanted.
   If there are several attachments, an action can be executed for all attachments at once. To do so, click on **All attachments**.

Note: Depending on the configuration, attachments will be checked for viruses before being downloaded.

- If no virus is found, the attachments will be downloaded without any further notification.
- If a virus scan was not possible or a virus was found, a window with a respective warning opens. In this case you can cancel the download.

User interface:

The Tasks detail view (p. 233)

Related topics:

Viewing Tasks (p. 235)

9.4 Creating Tasks

Learn how to create a task and about the functions available for defining the task data:

How to create a new task:

1. In the folder view, open a task list for which you have the permission to create objects.
2. Click on **New task**.
   If you work in another app and you do not want to leave that app, you can use the **More actions** icon ⌄ in the button for creating objects.
3. Enter a subject. Enter a description, if needed.
4. Click on **Create**.

Options:

- 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 a task reminder, select a setting in **Reminder**. The respective date and time are entered in **Reminder date**.
    To use custom values, set them in **Reminder date**. In this case, **Manual input** will be pre-selected in the **Reminder** field.
  - If the subject and description are not to be shown to other users, activate **Private**. Private tasks are marked with the **Private** icon 🔒.
  - Depending on the configuration, you can assign a category to the task. To do so, click on **Add category** next to **Categories**. Select an existing category or create a new one.
    In order to remove a category, click the **Remove category** icon × next to the category.
  - In order to add details like billing information, click on **Show details**. Enter the data required.

User interface:

The editing window (p. 234)

Subordinated actions:

Using the date picker in the editing window (p. 149)
Creating a recurring task in the editing window (p. 238)
Adding participants when creating a task (p. 238)
Adding attachments when creating a task (p. 239)

Related topics:

Creating E-Mail reminders (p. 104)
Importing tasks (p. 249)
Creating Appointments (p. 147)

9.4.1 Creating a recurring task in the editing window

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

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

Tip: Application examples can be found in Creating a recurring appointment in the editing window (p. 151)

Superordinated action:

Creating Tasks (p. 237)
Editing Tasks (p. 241)

9.4.2 Adding participants when creating a task

How to add participants in the task editing window:

1. In the input field below **Participant**, enter: the E-Mail address of the participant or the name of a group or distribution list.
   - Matching suggestions will be displayed during input. To accept a suggestion, click on it. To accept the first suggestion, press Enter.
   - To select contacts from an address book, click the **Select contact** icon on the right side of the input field.
2. In order to remove a participant, click the **Remove** icon next to the name.

Superordinated action:

Creating Tasks (p. 237)
Editing Tasks (p. 241)

Subordinated actions:

Automatically Adding Contacts or Resources from an Address Book (p. 206)
Automatically Adding Contacts or Resources from the Address Directory (p. 207)

9.4.3 Adding attachments when creating a task

Depending on the configuration, you can attach files that are saved on your computer or in the Drive app.

How to add attachments in the task editing window:

1. Select the files to be sent as attachments:
   - To send a local file as attachment, click on **Add attachment** below **Attachments**.
     You can also drag one or several local files from a file browser or the desktop to the task editing window.
   - In order to send the current version of a file from the Drive app as an attachment, click on **Add from Drive** below **Attachments**.
     Note: Depending on the configuration, this function might not be available.
2. You can remove an attachment if required. To do so, click the **Remove attachment** icon ⊖.

Superordinated action:

Creating Tasks (p. 237)
Editing Tasks (p. 241)

9.5 Responding to Task Invitations

Learn how to reply to an appointment invitation if you are being added to a task.

You will receive one of the following notifications:

- You will be informed about this task in the Notification area.
- You will receive an email invitation for the task.

You can respond to the invitation with **Confirm**, **Maybe** or **Decline**. You can always change the status later.

How to respond to a task invitation in the notification area:

1. In the menu bar, click the **Notifications** icon. The info area opens. Task invitations will be displayed below **Invitations**.
2. Use one of the following methods:
   - To reply to the task invitation without a comment, click on one of the buttons **Accept**, **Maybe**, **Decline**.
   - To reply to the task invitation with a comment, click the **Add comment** icon ···.
     Select one of the options **Accept**, **Maybe**, **Decline** in the *Change confirmation* window. If required, enter a comment.

How to respond to a task invitation in an email invitation:

1. Display an E-Mail with a task invitation in the E-Mail application.
2. Use one of the following methods:
   - To reply to the task invitation without a comment, click on one of the buttons **Accept**, **Maybe**, **Decline**.
   - To reply to the task invitation with a comment, click the **Add comment** icon ···.
     Select one of the options **Accept**, **Maybe**, **Decline** in the *Change confirmation* window. If required, enter a comment.

User interface:

The notification area (p. 33)

Related topics:

Changing task confirmations (p. 248)

9.6 Editing Tasks

Learn how to edit a task's data later.

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

How to edit a task:

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

User interface:

The Tasks tool bar (p. 232)
The editing window (p. 234)

Subordinated actions:

Using the date picker in the editing window (p. 149)
Creating a recurring task in the editing window (p. 238)
Adding participants when creating a task (p. 238)
Adding attachments when creating a task (p. 239)

Related topics:

Marking tasks as done (p. 246)
Changing a task's due date (p. 246)
Changing task confirmations (p. 248)
Creating Tasks (p. 237)
Using Categories (p. 312)

9.7 Calling Task Participants

Learn how to call a task participant by contacting the task participant via audio or video conference or phone.

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

Prerequisite:

- You have set up an account with an audio or video conference provider.
- Your computer has been configured to allow you to make phone calls over the Internet.

How to call a task participant:

1. Select a task in the list view. Click on a participant in the detail view. A pop-up opens.
   An icon below the name indicates the participant's presence status.
2. Click the **Call** icon in the detail view. Use one of the following methods:
   - In the menu, click on an audio or video conference provider. The window for calling the contact opens. Click on **Call**.
   - Select a phone number from the menu.

User interface:

The Tasks detail view (p. 233)

Related topics:

Calling the Sender or Another Recipient (p. 96)
Calling Appointment Participants (p. 164)
Creating an audio/video conference in the editing window (p. 150)
Calling Contacts (p. 214)
Setting the Presence Status (p. 48)

9.8 Adding Task Lists

With task lists you can organise your tasks, e.g. by separately saving tasks by customers or projects. Learn how to create personal task lists and how to set the view for shared task lists.

The following options are available:

- Adding personal task list (p. 244)
- Subscribing to public and shared task lists (p. 244)

User interface:

The Tasks folder view (p. 231)

Related topics:

Managing Tasks (p. 245)
Managing Data with Folders (p. 288)

9.8.1 Adding personal task list

You can create additional personal task lists below My lists.

How to create a new personal task list:

1. Click the **Folder-specific actions** icon + next to the **My lists** folder in the folder view. Click on **Add new task list**.
2. Enter a name. In case the new task list should be a public folder, enable **Add as public folder**.
3. Click on **Add**.

Related topics:

Moving tasks to another folder (p. 248)
Managing Data with Folders (p. 288)
What are folder types? (p. 289)

9.8.2 Subscribing to public and shared task lists

Task lists that are public or shared by other users can be used as follows:

- You can define which public and shared task lists are to be displayed in the folder view by subscribing to such task lists.
  This helps you to keep a better overview if there are many public and shared task lists in your groupware environment.
- If you subscribed to such a task list, you can set whether this task list is to be synchronised with other clients, e.g. with your smartphone.
- If you no longer need such a task list, you can cancel the subscription.

How to define the task lists to be subscribed to and synchronised:

1. Click the **More actions** icon next to **New task**. Click on **Subscribe shared task folders**.
   You can also click the **Settings** icon in the menu bar. Click on **Subscribe to shared task folders**
   A window opens. It shows your private, public and shared task lists.
2. If you want a task list to be displayed, enable the **Subscribe to task list** button.
   If you want a displayed task list to be synchronized, enable the **Synchronise via DAV** checkbox.
3. If you no longer want a task list to be displayed and synchronised, disable the **Subscribe to task list** button

User interface:

The New task button (p. 231)
The Tasks settings menu (p. 231)

Related topics:

Accessing other users' shares (p. 300)
Downloading Personal Data (p. 315)

9.9 Managing Tasks

Learn how to organise your tasks and about the available task actions.

- Marking tasks as done (p. 246)
- Changing a task's due date (p. 246)
- Organising tasks with categories (p. 247)
- Moving tasks to another folder (p. 248)
- Changing task confirmations (p. 248)
- Importing tasks (p. 249)
- Exporting tasks (p. 249)
- Printing tasks (p. 250)

Related topics:

Adding Task Lists (p. 243)

9.9.1 Marking tasks as done

You can mark undone tasks as done and vice versa.

How to mark a task as done:

1. Select at least one task in the list view.
2. Click the **Done** icon ⊘ in the tool bar.
   To mark the selected tasks as undone, click the **Undone** icon ▷.

Related topics:

Editing Tasks (p. 241)
Changing a task's due date (p. 246)
Changing task confirmations (p. 248)

9.9.2 Changing a task's due date

You can change a task's due date.

How to change a task's due date:

1. Select a task in the list view.
2. Click the **Due** icon 🕓 in the tool bar. Select an entry from the menu.

Related topics:

Editing Tasks (p. 241)
Marking tasks as done (p. 246)
Changing task confirmations (p. 248)

9.9.3 Organising tasks with categories

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

To organise tasks independently from folders, you can use categories.
- You can mark tasks with categories.
- You can display all tasks that have been marked with a specific category.

You can create, edit or delete your own categories, see Managing categories (p. 313).

How to mark tasks with a category:

1. Select a task. Click the **Edit contact** icon in the tool bar.
   The task editing window opens.
2. To do so, click on **Add category** next to **Categories**. Select a category.
   In order to remove a category from the task, click the **Remove category** icon × next to the category.

How to display tasks that have been marked with a specific category:

1. Select a task that has been marked with a category.
2. Click on the category in the detail view.

Result:
- The list view shows all tasks that have been marked with this category.
- To display the previous list, click the **Cancel search** icon × in the search field.

Options:
- You can also search for tasks with a specific category.
- To show all objects that have been marked with a specific category, you can browse the categories.

Related topics:

Managing categories (p. 313)
Browsing categories (p. 314)
Searching for Tasks (p. 252)
Organising email messages with categories (p. 102)
Organising appointments with categories (p. 173)
Organising contacts with categories (p. 221)

9.9.4 Moving tasks to another folder

You can move tasks to another folder.

How to move tasks to another folder:

1. Select at least one task in the list view.
2. Click the **More actions** icon ··· in the tool bar. Click on **Move**.
3. Select a folder in the *Move* window. You can create a new folder by clicking on **Create folder**.
4. Click on **Move**.

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

Related topics:

Adding personal task list (p. 244)

9.9.5 Changing task confirmations

If you are a task participant, you can later change your confirmation for this task. You can add a comment that is visible to other task participants.

How to change your confirmation:

1. Select a task in the list view.
2. Click the **More actions** icon ··· in the tool bar. Click on **Change confirmation**.
3. You can enter a comment in the *Change confirmation* window. Click on one of the buttons **Accept**, **Maybe**, **Decline**.

Related topics:

Responding to Task Invitations (p. 240)
Editing Tasks (p. 241)
Marking tasks as done (p. 246)
Changing a task's due date (p. 246)

9.9.6 Importing tasks

You can import tasks from files in iCal format.

How to import tasks from an iCal file:

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

Result: The tasks are added to the folder.

Related topics:

Exporting tasks (p. 249)
Creating Tasks (p. 237)

9.9.7 Exporting tasks

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

How to export individual tasks:

1. Select at least one task in the list view.
2. Click the **More actions** icon ⋯ in the tool bar. Click on **Export**. The *Export selected* window opens.
3. Click on **Export**.

Result: The iCAL file with the tasks exported will be created in the download folder.

How to export all tasks from a folder:

1. Select a personal or public task list in the folder view.
2. Click the **Actions** icon ⋯ next to the folder name. Click on **Export**. The *Export folder* window opens.
3. Click on **Export**.

Result: The iCAL file with the tasks exported will be created in the download folder.

Related topics:

Importing tasks (p. 249)
Downloading Personal Data (p. 315)

9.9.8 Printing tasks

You can print the data of a single task or of multiple tasks.

How to print a task's data:

1. Select at least one task in the list view.
2. Click the **More actions** icon ··· in the tool bar. Click on **Print**. 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.

9.10 Deleting Tasks

Warning: Deleted tasks **cannot** be restored.

How to delete tasks:

1. Select at least one task in the list view.
2. Click the **Delete** icon 🗑 in the tool bar.
3. Confirm that you want to delete the tasks.

9.11 Searching for Tasks

Learn how to search for tasks:

- define lists that are to be searched
- use search terms for subject, description
- If categories are available in your configuration, you can search for tasks with a specific category.
- limit the search to a specific time frame

You can use just one option or several options in any combination.

How to search for tasks:

1. Enter a search term in the search field in the menu bar.
2. To search the task data, press Enter.
   - Task data that contain the search term will be searched.
   - By default the search is processed in the current list.
3. You can use additional filters by clicking the **More search options** icon ⌵ in the search field. A window with search options opens.
   - To define whether to search in all lists or only in the selected one, select an entry in **Search in**.
   - In order to search in the task data, enter a search term in **Contains words**.
     It will be searched for task data that contain the search term.
   - To limit the search to tasks within a specific time frame, use **After** and **Before**.

   Click on **Search**.

The search results will be displayed in the list view.

The filters used are displayed below the search window. The following options are available:

- You can add filters and start a new search by clicking the **More search options** icon ⌵ in the search field.
- You can remove a filter and start a new search by clicking the **Remove filter** icon × next to the filter.

In order to finish the search, click the **Cancel search** icon × in the search field.

Related topics:

Viewing Tasks (p. 235)
Organising tasks with categories (p. 247)

10 Drive

Learn how to use the Drive app to save and view files, documents and other media and use them together with other people.

How to start the Drive app:

Click the **All Applications** icon ≡ in the menu bar. Click on **Drive** in the App Launcher.

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

Topics:

- The Drive Components (p. 254)
- Viewing Files (p. 261)
- Downloading Files or Folder Contents (p. 266)
- Drive: Adding Folders (p. 267)
- Uploading Files or Folders (p. 269)
- Creating Text Files (p. 270)
- Editing Text Files (p. 271)
- Organising Files and Drive Folders (p. 272)
- Deleting or Recovering Files and Drive Folders (p. 279)
- Searching for Files or Folders (p. 280)
- Sharing Data (p. 294)
- Accessing Files with WebDAV (p. 281)
- Adding Storage Accounts (p. 283)
- Drive Settings (p. 284)

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

10.1 The Drive Components

Learn about the components of the Drive app user interface and how to use them:

- The Drive settings menu (p. 255)
- The New button (p. 255)
- The Drive folder view (p. 256)
- The Drive tool bar (p. 257)
- The Drive navigation bar (p. 258)
- The Drive display area (p. 258)
- The file details (p. 259)
- The viewer (p. 260)

10.1.1 The Drive settings menu

The **Settings** icon ⚙ in the menu bar opens a menu with the following functions:

- Adjust all settings
- Select a theme for the user interface
- **Layout**. Defines the layout of objects in the display area.
- **Checkboxes**. Defines whether checkboxes for selecting objects will be shown in the display area.
- **File details**. Defines whether details for the selected file will be displayed in the **Details** side bar.
- **Add storage account**. Opens a window for adding cloud storage accounts that have been set up with other providers.
- **Manage Shares**. Opens a window in which you can enable or disable your subscription to public and shared folders.
- Depending on the configuration: **Connect your Device**. Launches a wizard for setting up local apps with which you can access your groupware data.

General description of the user interface:

The menu bar (p. 23)

Instructions:

Drive Settings (p. 284)
Adding Storage Accounts (p. 283)
Subscribing to public and shared Drive folders (p. 268)
Using a Wizard to Set Up Local Apps (p. 47)

10.1.2 The New button

Opens a menu with additional functions:

- Create new folder
- Uploading Files or Folders
- Depending on the configuration: upload files in encrypted format
- Add storage account. Opens a window for for adding cloud storage accounts that you set up in third party products like Dropbox.
- Depending on the configuration, functions for creating text documents, spreadsheets or presentations will be available.
- Create text note
- New email, New appointment

Note: If the folder is closed, the button will be displayed as an icon. To show the folder view, click the **Open folder view** icon ◫ on the bottom left side.

General description of the user interface:

The button for creating new objects (p. 26)

Instructions:

Drive: creating folders (p. 268)
Uploading Files or Folders (p. 269)
Adding Storage Accounts (p. 283)
Creating Text Files (p. 270)

10.1.3 The Drive folder view

Displays the folders.

If the folder view is closed, only some personal folders will be displayed as icons. Personal subfolders and other folders will not be displayed. To show the folder view, click the **Open folder view** icon ◫ on the bottom left side.

Content

- **Favourites**. Includes files and folders that you have added from the context menu to the symbolic **Favourites** folder.
- **Recent files**. Includes files that you have recently added or edited.
- **My files**. Contains your personal files and folders. By default, it contains folders for documents, music, images, and videos.
- **My shares**. Shows the files and folders shared by you for other users or external contacts.
- **My attachments**. Displays the file attachments of E-Mail messages sent or received by you.
- **Trash**. Contains the files and folders deleted by you.
- **Shared files**. Contains files shared with you by other users.
  If the shared data comes from another groupware installation, the user name will be appended with the name of the other domain.
- **Public files**. Contains files shared with all users.
- **Manage Shares**. Opens a window in which you can enable or disable your subscription to public and shared folders.

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

General description of the user interface:

The folder view (p. 27)

Related topics:

Drive: creating folders (p. 268)
Subscribing to public and shared Drive folders (p. 268)
Organising Files and Drive Folders (p. 272)
Managing Data with Folders (p. 288)
Sharing Data (p. 294)

10.1.4 The Drive tool bar

Contains functions for sharing, editing and organising files and folders. Notes:

- Some functions are only available if you opened a folder for which you have the appropriate permissions to create or edit objects.
- Some icons will only be displayed, if objects have been selected.
- If you have selected multiple files, some functions are not available.

Content

- **Share** icon. This function allows sharing files or folders.
- **Edit** icon. Edits a text file or an Office document. This function is only available if selecting a text file or an Office document.
- **New from template** icon. Creates a new document from a document template. This function is only available if selecting a document template.
- **View** icon. Shows the contents of the selected file 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.
- **Add to favourites** icon. Adds the files or folders that you have selected to Favourites.
- **Delete** icon. Deletes the files or folders selected by you.
- **More actions** icon ···. Opens a menu with functions for managing files and folders.

General description of the user interface:

The tool bar (p. 28)

Instructions:

Sharing data (p. 295)
Editing Text Files (p. 271)
Displaying a file's content (p. 263)
Downloading Files or Folder Contents (p. 266)
Adding files or Drive folders to Favourites (p. 277)
Deleting or Recovering Files and Drive Folders (p. 279)
Encrypting or Decrypting Files (p. 338)
Renaming files or Drive folders (p. 273)
Creating or editing descriptions (p. 274)
Sending files as email attachments (p. 273)
Adding files to the portal (p. 276)
Moving files or Drive folders (p. 274)
Copying files (p. 275)
Locking or unlocking files (p. 277)

Note: Instructions for creating, editing and presenting documents can be found in the Documents user guide.

Related topics:

Drive: Adding Folders (p. 267)
Uploading Files or Folders (p. 269)
Editing Text Files (p. 271)
Viewing Drive folder contents (p. 262)

10.1.5 The Drive navigation bar

The navigation path is located below the tool bar. The following functions are available:

- navigate within the folder structure
- sort and select objects

Functions

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

Related topics:

Viewing Drive folder contents (p. 262)
Displaying a file's content (p. 263)

10.1.6 The Drive display area

Displays the files and folders as list, icons or tiles To select a layout, click the **Settings** icon in the menu bar. Select an entry below **Layout**. You can also use the context menu in the display area.

- For each file and folder a row with the following content will be 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.
- Encrypted files are marked with the **Encrypted** icon .

You can show checkboxes for selecting objects. To do so, use the **Settings** icon in the menu bar or the context menu in the display area.

General description of the user interface:

The display area (p. 29)

Related topics:

Viewing Drive folder contents (p. 262)
Displaying a file's content (p. 263)
Organising Files and Drive Folders (p. 272)

10.1.7 The file details

Displays information about a selected object in the **Details** side bar.

To display the **Details** side bar, use one of the following methods:

- Click the **Settings** icon ⚙ in the menu bar. Enable **File details**.
- Right-click on a free area in the display area. In the context menu, enable **File details**.

Content

- A file preview, if available
- Name of the selected object
- If a photo has been selected: **Capture**
  Shows some EXIF data, if available.
- **General**. Shows general information about the object selected:
  - file size or number of objects in the folder
  - the parent folder's name
  - date of the last change
  - the editor's name
- **Shares**. Shows the object’s shares, if available.
  If clicking the **Share** icon, the window for creating or editing shares will be opened.
- **Description**. Shows file comments, if available.
  If clicking the **Edit description** icon, the window for creating or editing a description will be opened.
- When having selected an object in the **My attachments** folder, the **View message** button is displayed. When clicking on it, the respective E-Mail with the attachment is displayed.
- **Versions**. Will be shown if there are several versions of the file.
  For each version the following information is displayed:
  - the version's file name
  - **Actions** icon ⋯. Opens a menu with functions for working with versions.
  - name of the user who uploaded the version
    date and time of the version's upload
    the version's file size
- **Upload a new version** button. Click on this button to select a file that is uploaded as new version.

Related topics:

Viewing Drive folder contents (p. 262)
Displaying a file's content (p. 263)
Creating or editing descriptions (p. 274)
Working with versions (p. 278)

10.1.8 The viewer

Shows the contents of files. Contains functions for organising contacts.

In order to launch the viewer, do one of the following:

- Select a file. Click the **View** icon in the tool bar.
- Double-click on a file in the display area.
  Note: If double-clicking on an Office document, the respective Documents app is launched if configured accordingly.
- Select at least one file. Click on **View** in the context menu.

Content

- Name of the selected file. If clicking on the name, the *Rename* window opens.
- Depending on the selected file type, the respective functions are displayed.
  - If the selected file is editable, the **Edit** icon will be 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** and **Zoom in** icon will be displayed.
  - If an image is shown and there are additional images in the selected folder, the **Slideshow** icon will be displayed.
  - If a presentation or a PDF document is shown, the **Present** icon will be displayed.
- **Download** icon. Downloads the file.
- **Share**. This function allows sharing data.
- **More actions** icon. Opens a menu with additional functions.
  - Functions for managing, sharing or sending files
  - If displaying a document or a text file, the **Print as PDF** function will be available.
  - If there are several images, the **Run auto-play mode** function is available.
- **View details** icon. Opens or closes the **Details** side bar.
- **Pop out standalone viewer** icon. Displays the contents of the selected file in a new browser tab. If the side bar is displayed, you can use thumbnails to navigate through text documents, presentations and PDF documents.
- If there are additional files, icons for browsing are displayed to the left and to the right of the view.

Related topics:

Viewing Drive folder contents (p. 262)
Displaying a file's content (p. 263)
Holding a presentation (p. 264)
Organising Files and Drive Folders (p. 272)
Sharing Data (p. 294)

10.2 Viewing Files

Learn how to display various files, documents or pictures in different ways:

- Viewing Drive folder contents (p. 262)
- Displaying a file's content (p. 263)
- Displaying email attachments in Drive (p. 264)
- Holding a presentation (p. 264)

10.2.1 Viewing Drive folder contents

Learn how to display a Drive folder's files and subfolders in different layouts.

How to display a Drive folder's objects:

1. Open a folder in the folder view.
The folder's files and subfolders will be shown in the display area.

2. To select a layout, right-click on a free area in the display area. Select an entry below **Layout** in the context menu.
You can also use the entries below **Layout** in the **Settings** menu ⚙.

Options:

- To display checkboxes for selecting objects, right-click on a free area in the display area. In the context menu, enable **Checkboxes**.
You can also enable **Checkboxes** in the **Settings** menu ⚙.
- To change the sorting, click on **Sort by** in the navigation bar.
- To filter by specific object types, to select all objects or files or to clear the selection, click on **Select** in the navigation bar.
- In order to display details of a selected file, click the **Settings** icon ⚙ in the menu bar. Enable **File details**.

User interface:

The Drive folder view (p. 256)
The Drive display area (p. 258)
The viewer (p. 260)
The file details (p. 259)
The Drive tool bar (p. 257)
The Drive navigation bar (p. 258)

Related topics:

Displaying a file's content (p. 263)
Holding a presentation (p. 264)
Downloading Files or Folder Contents (p. 266)
Searching for Files or Folders (p. 280)

10.2.2 Displaying a file's content

The following options are available:

- display text files, documents or images in the Viewer
- view images as a slideshow
- play audio and video files, provided they are in a suitable format

The contents will be displayed in the viewer.

How to display a file's content:

1. Select a file in the display area.
2. Use one of the following methods:
   - Double-click on a file in the display area.
   - Select one or several files in the display area. Click the **View** icon in the tool bar.
   - Select **View** from the context menu.

   To display details for the selected file, enable the **Show details** icon.

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

Depending on the file type, different functions can be available:

- If the file content cannot be displayed, a button for downloading the file will be shown.
- For text files and documents in the Office format, there are editing functions available: Information on editing documents can be found in the Documents user documentation.
- For images, a button for running a slideshow is available.
- For presentations, an icon for presenting the presentation is shown.
- For audio and video files in suitable formats, there are playing functions available.
  Note: The playing options depend on the browser used.
- In order to display the file in a browser tab, click the **Pop out standalone viewer** icon.
  You can use thumbnails to navigate through text documents, presentations and PDF documents. To do so, enable the **Thumbnails** tab in the side bar. Click on a thumbnail image.

User interface:

The Drive folder view (p. 256)
The Drive display area (p. 258)
The viewer (p. 260)
The file details (p. 259)
The Drive tool bar (p. 257)
The Drive navigation bar (p. 258)

Related topics:

Viewing Drive folder contents (p. 262)
Holding a presentation (p. 264)
Downloading Files or Folder Contents (p. 266)
Searching for Files or Folders (p. 280)

10.2.3 Displaying email attachments in Drive

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. In the Drive app, open the **My shares** folder.

   You can also click the **Settings** icon ⚙ in the E-Mail app. Click on **All attachments**.
2. To view an attachment's content, use the methods for viewing files.

   To display the email that belongs to the selected attachment, click the **Settings** icon ⚙ in the menu bar. Enable **File details**. Click on **View message**.

User interface:

The Drive folder view (p. 256)
The Drive display area (p. 258)
The E-Mail settings menu (p. 69)

Related topics:

Holding a presentation (p. 264)
Downloading Files or Folder Contents (p. 266)
Viewing or Saving email Attachments (p. 78)

10.2.4 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 computer.
- Hold a remote presentation. This enables users who are not on-site, to follow the presentation.

How to hold a local presentation:

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

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

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

   You can use the icons on the right side of the tool bar to adjust the sheet size.
3. In order to locally start the presentation, click on **Start presentation** in the tool bar. Click on **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 full screen mode.
   - If clicking on **Pause presentation**, the presentation is stopped at the current sheet.
   - If clicking the **Toggle fullscreen** icon ⛶, the fullscreen mode will be activated. You can use the [esc] key or the function bar at the bottom of the screen to leave the fullscreen mode.
4. In order to end the presentation, click on **End presentation** in the tool bar.

How to hold a remote presentation:

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

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

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

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

   If clicking the **Show participants** icon, the users who remotely take part in the presentation will be 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 full screen mode.
   - If clicking on **Pause presentation**, the presentation is stopped at the current sheet.
   - If clicking the **Toggle fullscreen** icon, the fullscreen mode will be 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.

User interface:

The Drive display area (p. 258)
The file details (p. 259)
The viewer (p. 260)

Related topics:

Displaying a file's content (p. 263)
Displaying email attachments in Drive (p. 264)
Downloading Files or Folder Contents (p. 266)

10.3 Downloading Files or Folder Contents

Learn how to download individual files or folder contents to your local device.

The following options are available:

- download one or several files
- download the complete contents of a folder as zip archive

How to download files:

1. Open a folder containing files.
   Select one or several files in the display area.
2. Use one of the following methods:
   - Click the **Download** icon in the tool bar.
   - Select **Download** from the context menu.
   - Use the **Download** icon in the Viewer.
3. Complete the steps for downloading.

Tip: Learn how to download a certain file version by reading Section 10.8.11, “Working with versions”.

How to download the complete contents of a folder:

1. In the folder view, select the folder with the content you want to download.
2. Click the **Actions** icon ⋯ next to the folder name. Click on **Download entire folder**.
3. Complete the steps for downloading. The folder's content is saved as a Zip archive.

You can also download a folder by using the context menu in the display area.

Note: Depending on the configuration, attachments will be checked for viruses before being downloaded.

- If no virus is found, the attachments will be downloaded without any further notification.
- If a virus scan was not possible or a virus was found, a window with a respective warning opens. In this case you can cancel the download.

User interface:

The Drive display area (p. 258)
The viewer (p. 260)

Related topics:

Displaying a file's content (p. 263)
Displaying email attachments in Drive (p. 264)
Holding a presentation (p. 264)

10.4 Drive: Adding Folders

Learn how to create personal Drive folders and how to set the view for shared Drive folders:

- Drive: creating folders (p. 268)
- Subscribing to public and shared Drive folders (p. 268)

Related topics:

Organising Files and Drive Folders (p. 272)
Managing Data with Folders (p. 288)

10.4.1 Drive: creating folders

You can create new folders in the current folder.

How to create a new folder:

1. In the folder view, open a Drive folder for which you have the permission to create objects.
2. Click on **New**. Click on **New folder**.

   In the folder view, you can also click the **Actions** icon ··· next to the folder name. Click on **Add new folder**.
3. Enter a name in the *Add new folder* window.
4. Click on **Add**.

User interface:

The Drive folder view (p. 256)
The New button (p. 255)

Related topics:

Uploading Files or Folders (p. 269)
Creating Text Files (p. 270)
Organising Files and Drive Folders (p. 272)
Searching for Files or Folders (p. 280)
Managing Data with Folders (p. 288)
What are folder types? (p. 289)

10.4.2 Subscribing to public and shared Drive folders

You can define which public and shared Drive folders are displayed in the folder view by subscribing to such folders.

How to define the Drive folders you want to subscribe to:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **Manage shares**.

   A window opens. It shows the public and shared Drive folders.
2. If you want a folder to be displayed, enable the **Subscribe to folder** button.

   If you no longer want a folder to be displayed and synchronised, disable the **Subscribe to folder** button.

User interface:

The Drive settings menu (p. 255)
The Drive folder view (p. 256)

Related topics:

Accessing other users' shares (p. 300)
Downloading Personal Data (p. 315)

10.5 Uploading Files or Folders

You can upload local files or folders to the current Drive folder.

How to upload files:

1. In the folder view, open a Drive folder for which you have the permission to create objects.
2. Click on **New**. Click on **Upload files**.
3. Select a local file or multiple local files in the *Upload file* window.
   Click on **Open**. The current progress status will be shown in the display area.
   In the **Add files** section of the Drive settings, you can define whether a new file or a new version of a possibly existing file with the same name should be created.

How to upload a folder:

1. Open a Drive folder.
   Note: Open a folder for which you have the permission to create objects.
2. Click on **New**. Click on **Upload folder**.
3. Select a local folder in the *Select folder for upload* window.
   Click on **Upload**. The current progress status will be shown in the display area.

Notes:

- If there is already a Drive folder with this name, the name of the newly uploaded folder receives a consecutive number.
- Empty folders will not be uploaded.

Tips:

- 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 specific objects, click on **Details** at the bottom right side of the display area. Click on **Cancel** next to a object name in the *Upload progress* window.
- You can continue working in the groupware during the upload process.
- You can also upload objects by dragging them from a file browser or from the desktop to the Drive app window and dropping them in the display area.
- Depending on the configuration, there are functions available for uploading objects in an encrypted format.

User interface:

The Drive tool bar (p. 257)
The Drive display area (p. 258)
The file details (p. 259)

Related topics:

Drive: creating folders (p. 268)
Creating Text Files (p. 270)
Organising Files and Drive Folders (p. 272)
Searching for Files or Folders (p. 280)
Managing Data with Folders (p. 288)
Sharing Data (p. 294)
Uploading files securely by using encryption (p. 339)

10.6 Creating Text Files

Learn how to newly create plain text files.

How to create a new text file:

1. In the folder view, open a Drive folder for which you have the permission to create objects.
2. Click on **New**. Click on **New note**.
3. Enter a title.
   Enter the text or paste text from the clipboard.
   In order to edit the text, use the common techniques from familiar applications.

User interface:

The New button (p. 255)
The editing window (p. 34)

Related topics:

Editing Text Files (p. 271)
Drive: creating folders (p. 268)
Organising Files and Drive Folders (p. 272)
Searching for Files or Folders (p. 280)
Managing Data with Folders (p. 288)
Sharing Data (p. 294)

10.7 Editing Text Files

Learn how to edit plain text files.

How to edit a text file:

1. In the folder view, open a Drive folder for which you have the permission to create objects.
2. Use one of the following methods:
   - Select a text file. Click the **Edit** icon in the tool bar.
   - Double-click on a text file.
   - Display a text file in the Viewer. Click the **Edit** icon.

   The text will be opened for editing.
3. In order to edit the text, use the common techniques from familiar applications.

User interface:

The Drive tool bar (p. 257)
The editing window (p. 34)

Related topics:

Creating Text Files (p. 270)
Drive: creating folders (p. 268)
Organising Files and Drive Folders (p. 272)
Searching for Files or Folders (p. 280)
Managing Data with Folders (p. 288)
Sharing Data (p. 294)

10.8 Organising Files and Drive Folders

Learn what you can do with files and Drive folders:

- Sending files as email attachments (p. 273)
- Renaming files or Drive folders (p. 273)
- Creating or editing descriptions (p. 274)
- Moving files or Drive folders (p. 274)
- Copying files (p. 275)
- Saving files as PDF (p. 275)
- Printing files as PDF (p. 276)
- Adding files to the portal (p. 276)
- Adding files or Drive folders to Favourites (p. 277)
- Locking or unlocking files (p. 277)
- Working with versions (p. 278)

Related topics:

Drive: Adding Folders (p. 267)
Managing Data with Folders (p. 288)

10.8.1 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.
2. Use one of the following methods:
   - Click the **More actions** icon ⋯ in the tool bar. Click on **Send by mail**.
   - Click on **Send by e-mail** in the context menu.
   - Use the **More actions** icon ⋯ in the Viewer.
3. In the E-Mail edit window, fill in the details to send a new E-Mail.

User interface:

The Drive display area (p. 258)
The viewer (p. 260)

10.8.2 Renaming files or Drive folders

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

How to rename a file or folder:

1. Select a file or folder in the display area.
2. Click the **More actions** icon ⋯ in the tool bar. Click on **Rename**.
   You can also use one of the following methods:
   - Select **Rename** from the context menu.
   - When having selected a file, use the **More actions** icon ⋯ in the viewer or click on the file name on the upper left side of the viewer.
3. Edit the name in the *Rename* window.

User interface:

The Drive display area (p. 258)
The viewer (p. 260)

Related topics:

Creating or editing descriptions (p. 274)

10.8.3 Creating or editing descriptions

You can create or edit a file's description.

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

How to create or edit a file's description:

1. Select a file in the display area.
   If the **Details** side bar is not displayed, click the **Settings** icon ⚙ in the menu bar. Enable **File details**.
2. To view the buttons, click the **Panel on/off** icon > next to **Description** in the side bar.
   In order to add a description, click on **Add a description**.
   In order to edit a description, click on **Edit description**.

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

User interface:

The Drive display area (p. 258)
The file details (p. 259)
The viewer (p. 260)

Related topics:

Renaming files or Drive folders (p. 273)

10.8.4 Moving files or Drive folders

You can move the following objects to another folder:

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

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

How to move objects to another folder:

1. Select the objects in the display area.
2. Use one of the following methods:
   - Click the **More actions** icon ··· in the tool bar. Click on **Move**.
   - Select **Move** from the context menu.
   - Use drag and drop to move the items to a folder in the folder view.
3. Select a folder in the *Move* window. You can create a new folder by clicking on **Create folder**.
   Click on **Move**.

User interface:

The Drive display area (p. 258)

Related topics:

Copying files (p. 275)

10.8.5 Copying files

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

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

How to copy files to another folder:

1. Select one or several files in the display area.
2. Use one of the following methods:
   - Click the **More actions** icon ··· in the tool bar. Click on **Copy**.
   - Select **Copy** from the context menu.
3. Select a folder in the *Copy* window. You can create a new folder by clicking on **Create folder**.
   Click on **Copy**.

User interface:

The Drive display area (p. 258)

Related topics:

Moving files or Drive folders (p. 274)

10.8.6 Saving files as PDF

You can save documents and text files in PDF format. The PDF file will be saved to the folder that contains the document or text file.

Note: In Printing files as PDF (p. 276) you can learn how to save, download or print images as PDF.

How to save a document or text file in the PDF format:

1. Select the respective file in the display area.
2. Use one of the following methods:
   - Click the **More actions** ··· in the tool bar. Click on **Save as PDF**.
   - Select **Save as PDF** from the context menu.
   - Use the **More actions** icon ··· in the Viewer.
3. In the *Save as PDF* window, you can enter a name for the PDF file. Click on **Save**.

User interface:

The Drive display area (p. 258)
The viewer (p. 260)

Related topics:

The Drive tool bar (p. 257)
Printing files as PDF (p. 276)

10.8.7 Printing files as PDF

You can print documents, text files and images as PDF from within the viewer. The PDF can be downloaded or sent to a printer.

How to print a document, a text file or an image as PDF:

1. Select the respective file in the display area. Click the **View** icon ◎ in the tool bar.
   The file will be displayed in the viewer.
2. Click the **More actions** icon ···. Click on **Print as PDF**.
   The PDF will be displayed in a new page.
3. Use the following functions:
   - To download the PDF, click the **Download** icon.
   - To print the PDF, click the **Print** icon. Select a printer. If required, change the printer settings.

User interface:

The Drive display area (p. 258)
The viewer (p. 260)

Related topics:

Saving files as PDF (p. 275)

10.8.8 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 **More actions** icon ··· in the tool bar. Click on **Add to portal**.

User interface:

The Drive display area (p. 258)

Related topics:

Adding Portal widgets (p. 62)

10.8.9 Adding files or Drive folders to Favourites

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

- add objects to favourites
- remove objects from favourites

The original position of the objects in the folder view will not be affected by those actions.

How to add objects to Favourites:

1. Select the objects in the display area.
2. Use one of the following methods:
   - Click the **More actions** icon ⋯ in the tool bar. Click on **Add to favourites**.
   - Select **Add to favourites** from the context menu.

How to remove objects from Favourites:

1. In the folder view, click on **Favourites**. Select the objects in the display area.
2. Use one of the following methods:
   - Click the **More actions** icon ⋯ in the tool bar. Click on **Remove from favourites**.
   - Select **Remove from favourites** from the context menu.

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

User interface:

The Drive display area (p. 258)

Related topics:

Moving files or Drive folders (p. 274)

10.8.10 Locking or unlocking files

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

- The file lock informs other users that the file is currently being edited and might no longer be up to date.
- If the file is located in a folder that you share with other users whom you granted edit permissions, those users can not edit the locked file.
- If you are the owner of a shared file and another user locks the file, you can always unlock it.

How to lock files:

1. Select one or several files in the display area.
2. Click the **More actions** icon ⋯ in the tool bar. Click on **Lock**.

How to unlock files:

1. Select one or several locked files in the display area.
2. Click the **More actions** icon ⋯ in the tool bar. Click on **Unlock**.

User interface:

The Drive display area (p. 258)

10.8.11 Working with versions

The following options are available:

- open or save the current version
- upload a new version
- apply functions to a specific version:
  - view, edit, download
  - set as current version
  - delete the version
  - delete all previous versions

How to open or save the current version:

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

How to upload a new version:

1. Select a file in the display area. If the **Details** side bar is not displayed, click the **Settings** icon in the menu 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 of the selected file by dragging a file from a file browser or from the desktop to the viewer's or the display area's side bar and dropping it there.

How to work with a specific version:

1. Select a file in the display area. If no side bar is displayed, click the **Settings** icon in the menu bar. Enable **File details**.
2. Select **Versions** in the side bar.
   Click the **Actions** icon ⋯ next to a version. Select the function wanted.
   - To view the version in the Viewer, click on **View**.
   - In order to edit the current version, click on **Edit**.
     Note: You can only edit the current version. Depending on the file type, this function might not be available.
   - To download the version, select **Download**.
   - To set the version as the current version, select **Make this the current version**.
   - To delete the version, select **Delete version**.
   - To delete all previous versions, select **Delete all previous versions**.

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

User interface:

The Drive display area (p. 258)
The file details (p. 259)
The viewer (p. 260)

Related topics:

Downloading Files or Folder Contents (p. 266)
Encrypting files (p. 339)

10.9 Deleting or Recovering Files and Drive Folders

You can delete objects in the same way as files and folders. The following options are available:

- Delete objects. The objects are moved to the **Trash** folder.
- Restore deleted objects from the **Trash** folder.
  The objects are restored in their original location.
- Permanently delete objects from the **Trash** folder. You can also permanently delete all items in a folder by emptying the trash.

Note: Depending on the configuration, some folders cannot be deleted.

Warning: If you delete objects from the **Trash** folder, they are permanently deleted.

How to delete objects:

1. Select the objects in the display area.
2. Use one of the following methods:
   - Click the **Delete** icon in the tool bar.
   - Select **Delete** from the context menu.
3. Confirm that you want to delete the items.

How to restore deleted objects:

1. Open the **Trash** folder.
2. Select the objects to be restored.
3. Use one of the following methods:
   - Click the **More actions** icon ··· in the tool bar. Click on **Restore**.
   - Select **Restore** from the context menu.

Result: The objects are restored in their original location.

How to permanently delete objects:

Warning: Permanently deleted objects **cannot** be restored.

1. Open the **Trash** folder.
2. Select the objects.
3. Click the **Permanently delete** icon in the tool bar.
4. Confirm that you want to delete the items.

How to permanently delete the contents of the Trash folder:

Warning: Permanently deleted objects **cannot** be restored.

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

10.10 Searching for Files or Folders

Learn how to search for files and folders:

- use search terms for the file or folder name
  By default, all folders including their subfolders will be searched.
- limit the search to a file type or to folders
- define folders that are to be searched
- limit the search for files to a specific time frame

You can use just one option or several options in any combination.

Note:

When using storage accounts from other providers in the groupware: Depending on the properties of those storage accounts, you might not be able to browse them.
Also see: Adding Storage Accounts (p. 283)

How to search for files:

1. Enter a search term in the search field in the menu bar.
2. To search for folders and files that contain the search term, press Enter.
   Data that contain the search term will be searched for.
3. You can use additional filters by clicking the **More search options** icon ⌵ in the search field. A window with search options opens.
   - Enter a search term in **File or folder name**. Objects that contain the search term in their name will be searched for.
   - To limit the search to specific file types or to folders, select an entry in **Type**.
   - To define whether to search in all folders or only in the selected one including its subfolders, select an entry in **Search in**.
   - To limit the search to files that have been created or changed within a certain time frame, use **After** and **Before**.
     Note: The search for folders does not take the time frame into account.

   Click on **Search**.

The objects found will be shown in the display area.

The filters used are displayed below the search window. The following options are available:

- You can add filters and start a new search by clicking the **More search options** icon ⌵ in the search field.
- You can remove a filter and start a new search by clicking the **Remove filter** icon × next to the filter.

In order to finish the search, click the **Cancel search** icon × in the search field.

Related topics:

Displaying a file's content (p. 263)

10.11 Accessing Files with WebDAV

Learn how to use WebDAV for accessing 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 quick and direct access with a file browser e.g. the 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

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 (p. 282)
- Setting up WebDAV under Windows (p. 282)

10.11.1 Setting up WebDAV under Linux

How to set up WebDAV access under Linux:

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

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

10.11.2 Setting up WebDAV under Windows

How to set up WebDAV access under Windows:

1. In the navigation area of the Windows Explorer select the entry **This PC**.
   Click on the **Computer** tab at the top. Click on **Add network address**. The *Add network address* window opens. Click on **Next**.
2. Select **Select custom network address**. Click on **Next**.
3. Enter the following address in the **Internet or network address** input field.
   webdav://<address>/servlet/webdav.infostore
   Replace <address> with the groupware server's IP address or URL. Click on **Next**.
4. Enter your username and your password for the Groupware Server. Click on **OK**.
5. On the next page you can assign a name to the network address. Click on **Next**.
6. Click on **Finish**.

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

10.12 Adding Storage Accounts

Learn how to access your Cloud storage accounts, that you set up with other providers like Google Drive, Dropbox, Box or OneDrive, within the groupware. To do so you have to add your Cloud storage accounts to the groupware.

How to add a storage account:

1. Click on **New**. Click on **Add storage account**.
   You can also click the **Settings** icon in the menu bar. Click on **Add storage account**.
   The *Add storage account* window opens.
2. Click an icon. The next steps depends on the cloud storage service provider:
   - If the provider asks for credentials, enter your credentials for the cloud storage account.
   - If the provider asks you for permission to access the data, grant this permission.

A folder for the storage account appears in the folder view.

Options:

- To rename the folder, click the **Actions** icon ⋯ next to the folder name or use the context menu.
- Depending on the folder content, you can use the tool bar functions, e.g. to view pictures or to copy files.
  Note: Depending on the storage account's functionality, working with versions might not be supported.

User interface:

The New button (p. 255)
The Drive settings menu (p. 255)
Viewing, editing, deleting accounts (p. 311)

Related topics:

Renaming folders (p. 293)
Viewing, editing, deleting accounts (p. 311)

10.13 Drive Settings

How to open the Drive settings:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Click on **Drive** in the left pane.

The settings can be found in the following sections:

- Add files (p. 285)
- Version history (p. 285)
- Advanced settings (p. 285)

Also see: Searching for Settings (p. 38)

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

- **Add new version**
  A new version of the file will be created.
- **Add new version and show notification**
  A new version of the file will be created. As soon as the process is finished, you will receive a notification.
- **Rename automatically and keep both files separately**
  A new file will be added. The file name is enhanced with a consecutive number.

Version history
Depending on the configuration, you can define the number of file versions that should be kept for a specific time frame set by you. If the maximum time frame or number is reached, older versions are deleted upon creation of a new version.

- **Time frame**
  Defines the period after which an older version is deleted when creating a new version.
- **File version limit**
  Defines the maximum number of versions. If the maximum is reached, an older version is deleted when creating a new version.

Advanced settings

- **Slideshow for images**
  Defines how to present pictures that are displayed in the viewer
- **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.

User interface:

The Drive settings menu (p. 255)

Related topics:

Searching for Settings (p. 38)
Customised Settings (p. 37)

11 Data Organisation and Shares

Learn how to organise your email messages, contacts, appointments, tasks and other data and how to share them with other persons.

- Managing Data with Folders (p. 288)
- Sharing Data (p. 294)
- Managing Deputies (p. 305)
- Managing Accounts (p. 308)
- Using Categories (p. 312)
- Downloading Personal Data (p. 315)

Information on encrypting E-Mail messages and files can be found in Encrypting Data with Guard (p. 329)

11.1 Managing Data with Folders

Learn how to use folders [14] in all apps for the following requirements:

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

Folders are called differently in the following apps:

- In the Calendar app, a folder is called calendar.
- In the Address Book app, a folder is called address book.
- In the Tasks app, a folder is called list.

What you should know:

- What are folder types? (p. 289)
- What is the purpose of permissions? (p. 290)

The following options are available:

- Navigating within the folder structure (p. 291)
- Hiding folders (p. 292)
- Adding folders to favourites (p. 292)
- Renaming folders (p. 293)
- Moving folders (p. 293)
- Deleting folders (p. 293)

Additional information on files and folders in the Drive app can be found in Organising Files and Drive Folders (p. 272).

User interface:

The folder view (p. 27)

The E-Mail folder view (p. 70)
The Calendar folder view (p. 133)
The Address Book folder view (p. 196)
The Tasks folder view (p. 231)
The Drive folder view (p. 256)
The Drive display area (p. 258)

Related topics:

Adding E-Mail Folders (p. 97)
Adding Calendars (p. 165)
Adding Address Books (p. 215)
Adding Task Lists (p. 243)
Drive: Adding Folders (p. 267)

11.1.1 What are folder types?

The folder type defines the folder access for the users. The following folder types exist in the folder view:

- Personal folders
  - Personal folders contain your email messages and groupware data. Other users cannot view your personal folders, unless you share them with other users.
  - Your personal folders can be found at the top of the folder view.
  - In the single apps, you can add personal folders e.g. calendars, address books and lists.
    In the E-Mail and Drive app, you can also create subfolders.

Depending on the configuration, the following folder types are available in addition:

- Public folders
  - Public folders contain groupware data that are of common interest to all users. Each user can create public folders and share them with other users.
  - Public folders can be found below your personal folders, in the folder view.
- Shared folders
  - Shared folders are folders that have been shared with you by other users.
  - Shared folders can be found at the bottom of the folder view.

Related topics:

The folder view (p. 27)

What is the purpose of permissions? (p. 290)

Adding personal calendars (p. 166)
Adding personal address books (p. 216)
Adding personal task list (p. 244)
Drive: creating folders (p. 268)

11.1.2 What is the purpose of permissions?

Permissions define what a user can do with a particular folder and its contents.

- As an internal user you have preset permissions for existing folders.
  When creating a new folder, you will be granted the preset permissions.
- When inviting other people to a shared item, you grant them specific permissions.

You have the following permissions for folders that already exist:

- You are the owner of your personal folders. As an owner you have the same permissions as an administrator:
  - You have all permissions for this folder.
  - You can grant other people permissions for the folder, but not administrator permissions.
- In public folders, you can create folders and share them with other persons.
- In the **All users** folder, you are allowed to read objects.

When creating a new folder, you will be granted the following permissions:

- If you create a new folder in a personal folder:
  - You are the owner of the new folder.
  - If you create a subfolder in a shared folder in the E-Mail or Drive app, the subfolder will be shared as well.
- If you create a folder as a public folder:
  - You are the owner of the new folder.
  - Other users will get no rights. You have to set the permissions for the new folder. You can grant other users all kinds of permissions.
- If you create a new folder in the shared folder of another user:
  - The user who shared the folder is the administrator of the new folder.
  - You are the author of the new folder.
    An author is allowed to change or delete existing objects, to create and edit new objects, and to create subfolders.

Related topics:

What are folder types? (p. 289)
Which permissions can be used? (p. 301)
Use cases for permissions (p. 303)
Sharing Data (p. 294)

11.1.3 Navigating within the folder structure

The following functions are available:

- open or close the folder view
- change the folder view width
- open or select a folder in the folder view

How to open or close the folder view:

Click the **Open folder view** or **Close folder view** icon .

How to change the folder view width:

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

How to open or select a folder:

1. If the folder view is closed, open it.
2. A folder in the E-Mail and Drive app can have subfolders. To show the subfolders, open the folder by clicking the icon next to the folder name.
   You can also open or close a folder by double-clicking on it.
3. Click on a folder. The folder's items are displayed in the detail view.
   In the Drive app, additionally the following options are available:
   - 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.

Super-ordinate actions:

Viewing Email Messages (p. 77)
Working with inbox categories (p. 99)
Displaying appointments in different views (p. 142)
Displaying an address book’s contacts (p. 202)
Viewing Tasks (p. 235)
Viewing Files (p. 261)
Displaying a file's content (p. 263)

Related topics:

Hiding folders (p. 292)
Adding folders to favourites (p. 292)

11.1.4 Hiding folders

In the Address Book, Calendar or Tasks app, you can hide certain personal, shared or public folders. The hidden folders will be displayed in a collective folder at the bottom of the folder view. The following functions are available:

- hide individual folders
- display hidden folders again

How to hide a folder:

1. In the folder view of the Calendar, Address Book or Tasks app, select the folder you want to hide.
2. Click the **Actions** icon ··· next to the folder name. Click on **Hide**.
   Note: If you select a folder that cannot be hidden, this function will not be displayed.

How to display a hidden folder again:

1. In the folder view of the Calendar, Address Book or Tasks app, respectively select one of the entries **Hidden address books**, **Hidden calendars** or **Hidden lists** The hidden folders will be displayed.
2. Click the **Actions** icon ··· next to a folder name. Click on **View**.

Related topics:

Navigating within the folder structure (p. 291)
Adding folders to favourites (p. 292)

11.1.5 Adding folders to favourites

For a quicker access to frequently used folders, you can add folders to **Favourites** in all apps. Those folders will then not only be shown in their origin location, but also in **Favourites** at the top. The following functions are available:

- add folders to favourites
- remove folders from favourites

How to add a folder to Favourites:

1. Select a folder in the folder view.
2. Click the **Actions** icon ··· next to the folder name. Click on **Add to favourites**.

How to remove a folder from Favourites:

1. Select a folder in the folder view below **Favourites**.
2. Click the **Actions** icon ··· next to the folder name. Click on **Remove from favourites**.
   You can also activate this function by right-clicking on the folder in its original position in the folder view.

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

Related topics:

Navigating within the folder structure (p. 291)
Hiding folders (p. 292)

11.1.6 Renaming folders

You can rename personal folders created by you. There are some personal folders preset in the groupware. Those folders cannot be renamed.

How to rename a folder:

1. In the folder view, select the folder that you want to rename.
2. Click the **Actions** icon ⋯ next to the folder name. Click on **Rename**.
3. Edit the name or enter a new name. Click on **Rename**.

Related topics:

Navigating within the folder structure (p. 291)
Moving folders (p. 293)
Deleting folders (p. 293)
Adding Storage Accounts (p. 283)

11.1.7 Moving folders

You can move personal folders created by you. There are some personal folders preset in the groupware. Those folders cannot be moved.

How to move a folder:

1. In the folder view, select the folder that you want to move.
2. Click the **Actions** icon ⋯ next to the folder name. Click on **Move**.
3. Select a folder in the *Move folder* window. You can create a new folder by clicking on **Create folder**.
4. Click on **Move**.

Related topics:

Navigating within the folder structure (p. 291)
Renaming folders (p. 293)
Deleting folders (p. 293)

11.1.8 Deleting folders

You can delete personal folders created by you. There are some personal folders preset in the groupware. Those folders cannot be deleted.

Warning: If you delete a calendar, an address book or a list, this folder and all its contents will be deleted. The deleted folder cannot be restored.

If you delete a folder in the E-Mail or Drive app, the folder will be moved to the **Trash**. You can permanently delete the folder or restore it by moving it.

How to delete a folder:

1. In the folder view, select the folder that you want to delete.
2. Click the **Actions** icon ⋯ next to the folder name. Click the **Delete** button.
3. Confirm that you want to delete the folder.

Related topics:

Navigating within the folder structure (p. 291)
Renaming folders (p. 293)
Moving folders (p. 293)

11.2 Sharing Data

Learn how to co-operate with other users by sharing your groupware data with read or edit permissions.

Learn which data you can share:

- Which data can be shared? (p. 295)

The following options are available:

- Sharing data (p. 295)
- Editing shares (p. 297)
- Resending an invitation (p. 298)
- Removing shares (p. 298)
- Viewing or editing shares in the Drive app (p. 299)
- Subscribing to shared or personal E-Mail folders (p. 300)
- Accessing other users' shares (p. 300)

Information about permissions that can be used when sharing, are to be found here:

- Which permissions can be used? (p. 301)
- Use cases for permissions (p. 303)

User interface:

The E-Mail folder view (p. 70)
The Calendar folder view (p. 133)
The Address Book folder view (p. 196)
The Tasks folder view (p. 231)
The Drive folder view (p. 256)
The Drive display area (p. 258)
The viewer (p. 260)

Related topics:

What is the purpose of permissions? (p. 290)

11.2.1 Which data can be shared?

Depending on the app, you can share the following data:

- email folders
  - The **Inbox** folder as well as all folders and subfolders in **My folders** can be shared with internal users with read permissions.
    The internal users have to subscribe to the shared email folder in order to read the folder's email messages, see Subscribing to shared or personal E-Mail folders (p. 300).
  - The **My folders** folder cannot be shared.
  - If you share a folder, its subfolders will not be shared automatically.
- Calendar
  - The folders in **My calendars** can be shared with internal users with read or edit permissions.
  - The **My calendars** folder cannot be shared.
- Address book
  - The folders in **My address books** can be shared with internal users with read or edit permissions, with external partners only with read permissions.
  - The folders **My address books** and **All users** cannot be shared.
- Tasks
  - The folders in **My address books** can be shared with internal users with read or edit permissions, with external partners only with read permissions.
  - The **My lists** folder cannot be shared.
- Drive
  - The files and folders in **My files** can be shared with internal users and external contacts with read or edit permissions.
  - If you share a folder, its subfolders will automatically be shared as well.
- In all apps except for the E-Mail app, you can create a public link and pass it on to other people. People with the public link can read the shared data but not edit them.

Notes:

- In order to share data, you need to have administrator permissions for the respective folder. You have the exclusive administrator rights for your personal calendars, address books and task lists. You cannot grant administrator rights for those folders to other users.
- Shared folders are marked with the **Share** icon.
  In the Drive app, shared objects will be displayed below the **My shares** folder.
- When sharing items, people are granted certain permissions for the shared data, see Which permissions can be used? (p. 301) and Use cases for permissions (p. 303).

For external partners, the following rules apply:

- You select the people and their permissions for accessing a shared item. Depending on the permissions, external contacts will be signed in to the groupware with or without entering a password.
- A guest user can only view data and the respective apps that have been shared with the guest user. A guest user has no access to the E-Mail and Portal app.
- Guest users have no access to the **All users** address book. They cannot share items.

Instructions:

Sharing data (p. 295)

11.2.2 Sharing data

Depending on the app, you can share data with other people with read or edit permissions by inviting them to a shared item or creating a public link and passing it on.

How to share data with other people:

1. Select the app that should be used for sharing data. Select a folder in the folder view.
   In the Drive app, you can also select a folder or file in the display area.
   Note: Depending on the app, some folders cannot be shared.
2. Click the **Actions** icon ··· next to the folder name. Click on **Share / Permissions**.
   In the Drive app, you can also click on **Share** in the tool bar or use the context menu in the display area.
   The window for granting permissions opens.
3. To exclusively share the data with specific people, select **Only invited people** below **Who can access this folder?**
   Note: This option is not available in the E-Mail app.
   Enter a name or an E-Mail address in **Invite people**.
   - To set a person's permission, select a user role in **Invite as**.
   - To adjust the user role of a person added, click on the assigned user role next to the person or on **Details**.
   - To remove a person's permission, click the **Actions** icon ··· next to the person. Click on **Remove**.

   The **Invitation message (optional)** input field will be displayed. If required, enter a message.
4. To share the data with all people who get a link, select **Anyone with the public link and invited people** below **Who can access this folder?**.
   Note: This option is not available in the E-Mail app.
   To pass on the public link by using the clipboard, click on **Copy link** next to **Public link**.
   People with the public link can only read the shared data. Other permissions cannot be granted for public links.
   You can invite additional people to the shared item.

Options:

In order to adjust the settings, click the **Sharing options** icon in the title bar. The following settings are available:

- **Link options:**
  The link options will only be available if you select the entry **Anyone with the public link and invited people** below **Who can access this folder?**. The link options will not be available in the E-Mail app.
  - To set a time limit for the access to the shared data, select a time frame in **Expiration**.
  - To protect access with a password, enter a password in **Password (optional)**. Make sure the recipient of the public link receives the password.
- **Invitation options**
  - To automatically send a message to people invited by you to a shared item, enable **Send notification by e-mail**.

Subordinated actions:

Automatically Adding Contacts or Resources from an Address Book (p. 206)
Automatically Adding Contacts or Resources from the Address Directory (p. 207)

Related topics:

Which permissions can be used? (p. 301)
Use cases for permissions (p. 303)
Editing shares (p. 297)
Resending an invitation (p. 298)
Removing shares (p. 298)
Viewing or editing shares in the Drive app (p. 299)
Subscribing to shared or personal E-Mail folders (p. 300)
Accessing other users' shares (p. 300)

11.2.3 Editing shares

You can edit shared items that you created when inviting people. The following options are available:

- adjust user roles or permissions
- add new persons to a share

Notes:

- As owner of a personal folder you cannot change your administrator permission for this folder.
- Public links only include read permissions. This permission cannot be changed.

How to edit existing shares:

1. In the folder view, select a folder that you shared.
   In the display area of the Drive app, you can also select an object shared by you.
2. Click the **Actions** icon ⋯ next to the folder name. Click on **Share / Permissions**.
   In the Drive app, you can also click on **Share** in the tool bar or use the context menu in the display area.
   The window for granting permissions opens.
3. To edit the user roles or permissions, the following options are available:
   - To adjust a user role, click on the assigned user role next to the person.
   - To adjust the permission details, click on **Details** next to the person.
4. To add new persons, enter a name or an E-Mail address in **Invite people**.

Related topics:

Which permissions can be used? (p. 301)
Use cases for permissions (p. 303)
Sharing data (p. 295)
Resending an invitation (p. 298)
Removing shares (p. 298)
Viewing or editing shares in the Drive app (p. 299)
Subscribing to shared or personal E-Mail folders (p. 300)

11.2.4 Resending an invitation

You can resend an invitation to an already granted share.

How to resend an invitation to a person:

1. In the folder view, select a folder that you shared.
   In the display area of the Drive app, you can also select an object shared by you.
2. Click the **Actions** icon ··· next to the folder name. Click on **Share / Permissions**.
   In the Drive app, you can also click on **Share** ⋖ in the tool bar or use the context menu in the display area.
   The window for granting permissions opens.
3. Click the **Actions** icon ··· next to a user name. Click on **Resend invitation**.

Related topics:

Sharing data (p. 295)
Editing shares (p. 297)
Removing shares (p. 298)
Viewing or editing shares in the Drive app (p. 299)
Subscribing to shared or personal E-Mail folders (p. 300)

11.2.5 Removing shares

The following options are available:

- Revoke the access to a shared item for a specific person.
- Remove all access permissions and the public link for an item.

How to revoke the access to a shared item:

1. In the folder view, select a folder that you shared.
   In the display area of the Drive app, you can also select an object shared by you.
2. Click the **Actions** icon ··· next to the folder name. Click on **Share / Permissions**.
   In the Drive app, you can also click on **Share** ⋖ in the tool bar or use the context menu in the display area.
   The window for granting permissions opens.
3. Click the **Actions** icon ··· next to a person's name. Click on **Revoke access**.

How to remove all access permissions and the public link for a shared item:

1. In the folder view, select a folder that you shared.
   In the display area of the Drive app, you can also select an object shared by you.
2. Click the **Actions** icon ··· next to the folder name. Click on **Share / Permissions**.
   In the Drive app, you can also click on **Share** ⋖ in the tool bar or use the context menu in the display area.
   The window for granting permissions opens.
3. Click on **Unshare**.

Related topics:

Sharing data (p. 295)
Editing shares (p. 297)
Resending an invitation (p. 298)
Viewing or editing shares in the Drive app (p. 299)

11.2.6 Viewing or editing shares in the Drive app

In addition to the basic functions, the following options are available in the Drive app:

- You can display your shared objects as a list. You can sort the list by different criteria.
- You can edit or revoke shares.

How to view your shares in the Drive app:

1. In the Drive app, open **My shares** in the folder view.

   The folders and files shared by you are displayed in the detail view. For each share a row with the following details is displayed in the detail view:
   - An icon indicates the share's object type: file or folder.
   - The name of the shared item.
   - Three icons indicate whether an object has been shared with specific users:
     - **Internal users** icon: The object has been shared for internal users.
     - **External users** icon: The object has been shared for guest users or for guest users and internal users.
     - **Public link** icon: The folder has been shared with a public link.
   - The name of the folder containing the shared object.
   - The date when the item was shared.
   - For a file: the file size
2. You can use the following functions:
   - To sort the shares list, click on **Sort by** above the list.
   - To filter the list of shared items by specific object types, to select all items or to clear the selection, click on **Select** above the list.
   - To display the folder of a shared object, open the object's context menu. Click on **Show in Drive**.

How to edit a share in the Drive app:

1. In the Drive app, open **My shares** in the folder view.

   The folders and files shared by you are displayed in the detail view.
2. Select a folder or file in the detail view. Click the **Edit share** icon in the tool bar or click on **Shares / Permissions** in the context menu.

   The window for granting permissions opens.
3. The following options are available:
   - To adjust permissions, change the user role or click on **Details**.
   - To revoke the access to a shared item, click the **Actions** icon ⋯ next to a person’s name. Click on **Revoke access**.
   - To remove all permissions to an item and the public link, click on **Unshare**.

Related topics:

Which permissions can be used? (p. 301)
Use cases for permissions (p. 303)
What is the purpose of permissions? (p. 290)
Sharing data (p. 295)
Editing shares (p. 297)
Resending an invitation (p. 298)
Removing shares (p. 298)
Accessing other users' shares (p. 300)

11.2.7 Subscribing to shared or personal E-Mail folders

In order to see email folders shared by other users, you have to subscribe to those folders. You will be subscribed automatically to your personal email folders. To hide a personal email folder, you have to cancel the subscription.

How to subscribe to personal or shared E-Mail folders:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Mail** in the left pane.
   Click on **Change IMAP subscriptions** below **Advanced settings**.
3. In the *Subscribe IMAP folders* window, enable the checkboxes of the folders that you want to subscribe to.
4. Click on **Save**.

Related topics:

Sharing data (p. 295)
Editing shares (p. 297)
Resending an invitation (p. 298)
Removing shares (p. 298)
Downloading Personal Data (p. 315)
Email Settings (p. 124)

11.2.8 Accessing other users' shares

In the folder view, you have access to data shared with you by other users. You can define which public or shared address books, calendars or task lists will be displayed in your folder view.

How to access data shared by other users:

1. Open the shared folder at the bottom of the folder view.
   If a user shared data with you, a folder named after the user will be displayed. If the shared data came from another groupware installation, the user name will be appended with the name of the other domain.
   You are automatically subscribed to shared address books, calendars and task lists. To hide those folders, cancel the subscription in the settings of the respective app.
   Tip: To see the permissions that have been granted for the shared folder, click the **Actions** icon ⋯. Click on **Share / Permissions**.
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.

Related topics:

Which permissions can be used? (p. 301)
Use cases for permissions (p. 303)
Sharing data (p. 295)
Viewing or editing shares in the Drive app (p. 299)
Subscribing to shared or personal E-Mail folders (p. 300)
Subscribing to public and shared calendars (p. 167)
Subscribing to public and shared address books (p. 218)
Subscribing to public and shared task lists (p. 244)
Subscribing to public and shared Drive folders (p. 268)

11.2.9 Which permissions can be used?

In order to easily grant logical permission combinations, there are specific preset user roles: A user role consists of logical permission combinations. You can also grant detailed permissions. You can grant such permissions by sharing objects.

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

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

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

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

Reviewer: Limited edit permissions
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: Full edit permissions
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:

- Folder
  - 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

Related topics:

Use cases for permissions (p. 303)
What is the purpose of permissions? (p. 290)
Sharing Data (p. 294)
Sharing data (p. 295)
Accessing other users' shares (p. 300)
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Viewing or editing shares in the Drive app (p. 299)

11.2.10 Use cases for permissions

The following examples show which permissions need to be granted to other people to enable them to execute specific actions in a shared folder. You can grant such permissions by sharing objects.

- **Example 1:** View objects. Not change and delete objects. Not create new objects.
  Settings in **Details**:
  - Folders: view the folder
  - Read permissions: read all objects
  - Write permissions: none
  - Delete permissions: none
  - Administrative role: User

  You can also assign the Viewer role.
- **Example 2:** View objects. Not change and delete objects. Create and edit new objects.
  Settings in **Details**:
  - Folders: view the folder
  - Read permissions: read all objects
  - Write permissions: edit own objects
  - Delete permissions: delete own objects
  - Administrative role: User
- **Example 3:** Not view existing objects. Create and edit new objects.
  Settings in **Details**:
  - Folders: create objects
  - Read permissions: read own objects
  - Write permissions: edit own objects
  - Delete permissions: delete own objects
  - Administrative role: User
- **Example 4:** View and edit all objects. Create and edit subfolders and objects,
  Settings in **Details**:
  - Folders: create objects and subfolders
  - Read permissions: read all objects
  - Write permissions: edit all objects
  - Delete permissions: delete all objects
  - Administrative role: User

  You can also assign the **Author** role.
- **Example 5:** All permissions. Grant permissions to other users.
  Settings in **Details**:
  - Folders: create objects and subfolders
  - Read permissions: read all objects
  - Write permissions: edit all objects
  - Delete permissions: delete all objects
  - Administrative role: administrator

  You can also assign the **Administrator** role.

Related topics:

Which permissions can be used? (p. 301)
What is the purpose of permissions? (p. 290)
Sharing data (p. 295)
Accessing other users' shares (p. 300)
Editing shares (p. 297)
Resending an invitation (p. 298)
Removing shares (p. 298)
Viewing or editing shares in the Drive app (p. 299)

11.3 Managing Deputies

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

You can appoint other users to act as your deputy [13]. You can grant one or multiple deputies different permission levels to handle the email communication and appointment scheduling in your name.

The following options are available:

- Adding deputies (p. 306)
- Viewing, editing, deleting deputies (p. 307)

Related topics:

Sending or Receiving Email Messages as Deputy (p. 122)
Creating, Editing or Managing Appointments as Deputy (p. 184)
Adjusting the General Settings (p. 39)

11.3.1 Adding deputies

The following options are available:

- set one or multiple deputies
- grant a deputy specific permissions for your email correspondence
- grant a deputy specific permissions for your calendar

How to set one or more deputies:

1. Click the **Settings** icon ⚙ on the right side of the menu bar. Click on **All settings**.
   The *Settings* window opens.
   Click on **Basic** in the left pane. Click on **Manage deputies** below **Advanced settings**
   You can also use one of the following methods:
   - In the E-Mail app, click on the **Inbox** context menu in the folder view.
     Click on **Manage deputies**.
   - In the Calendar app, open the context menu of your personal calendar in the folder view.
     Click on **Manage deputies**.

   The *Manage deputies* window opens.
2. To add a deputy, enter the deputy's email address in **Add people**.
   - Matching suggestions will be displayed during input. To accept a suggestion, click on it. To accept the first suggestion, press Enter.
   - To select deputies from an address book, click the **Select contacts** icon on the right side of the input field.

   The *Deputy* window opens.
3. Define the email actions to be covered by your new deputy by selecting an entry next to **Inbox**.
   - Reading, replying to, forwarding, marking, printing, copying email messages: Select **Viewer**.
   - All of the above and marking all messages in the inbox as read: Select **Editor**.
   - All of the above and deleting email messages, executing folder actions: Select **Author**.
   - Sending email messages on your behalf: Enable the respective checkbox.
4. Define the appointment actions to be covered by your new deputy by selecting an entry next to **Calendar**.
   - Reading, exporting, printing appointments and sending email messages to the appointment participants: Select **Viewer**.
   - All of the above and creating, editing, declining appointments, changing the status, move to another calendar: Select **Editor**.
   - All of the above and deleting appointments, executing folder actions: Select **Author**.

Related topics:

Viewing, editing, deleting deputies (p. 307)

11.3.2 Viewing, editing, deleting deputies

The following options are available:

- display a list of your deputies
- change a deputy's permissions
- add deputies
- remove deputies

How to view, edit or delete deputies:

1. Click the **Settings** icon ⚙ on the right side of the menu bar. Click on **All settings**.
   The *Settings* window opens.
   Click on **Basic** in the left pane. Click on **Advanced Settings** in the left pane. Click on **Manage deputies**.
   You can also use one of the following methods:
   - In the E-Mail app, click on the **Inbox** context menu in the folder view.
     Click on **Manage deputies**.
   - In the Calendar app, open the context menu of your personal calendar in the folder view.
     Click on **Manage deputies**.

   The *Manage deputies* window opens.
2. To add a deputy, enter the deputy's email address in **Add people**.
   To select deputies from an address book, click the **Select contacts** icon on the right side of the input field.
3. To change a deputy's permissions, click on **Edit** next to the deputy.
   Change the permissions in the *Deputy* window.
4. To remove a deputy, click the **Remove** icon × next to the deputy.
   Confirm that you want to remove the deputy.

Related topics:

Adding deputies (p. 306)

11.4 Managing Accounts

Learn how to manage your accounts [13] that have been set up by default or have been set up by you.

- your primary E-Mail account
- functional email accounts, if available
- social network accounts
- your Google account for calendar, contacts, Drive
- storage accounts

The following options are available:

- Editing the primary E-Mail account (p. 309)
- Disabling or enabling functional email accounts (p. 310)
- Viewing, editing, deleting accounts (p. 311)
- Refreshing and managing address book subscriptions (p. 217)

11.4.1 Editing the primary E-Mail account

You can edit your primary email account [14]:

- Change the name of your primary E-Mail account. This name is displayed in the E-Mail settings.
- Depending on the configuration, you can change the preset sender name.
- If replies are not to be sent to your primary email account, you can set reply-to addresses.
- Change the folder of your primary E-Mail account

How to edit the primary E-Mail account:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Accounts** in the left pane.
   Click on **Your accounts**.
3. Click on **Edit** next to the primary email account. The *Edit mail account* window displays the current settings.
   - 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.
   - 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.
     Note: Depending on the configuration, this function might not be available.
   - To set reply-to addresses, enter one email address or multiple email addresses in **Reply To** . Use the comma as separator.
     When sending a new email, those addresses will be automatically used as preset reply-to addresses.
   - To select other folders, browse down to **Standard folders**.
     Click on **Select** next to a folder. Select a subfolder below the **INBOX** folder.
     Note: Do not select the **INBOX** folder. Select a subfolder below **INBOX**.

Related topics:

Disabling or enabling functional email accounts (p. 310)
Viewing, editing, deleting accounts (p. 311)
Adding E-Mail Accounts (p. 123)
Email Settings (p. 124)
Specifying a reply address when sending (p. 81)

11.4.2 Disabling or enabling functional email accounts

Depending on the configuration, the administrator can assign a functional email account [14] to you, for example support@example.com. This account will be displayed in the folder view. If the account is not to be displayed, you can disable the account.

How to disable or enable functional email accounts:

1. Click the **Settings** icon ⚙ on the right side of the menu bar. Click on **General**.
   The *Settings* window opens.
2. Click on **Accounts** in the left pane.
   Click on **Your accounts**.
3. Click on **Disable** next to the functional email account.
   The email account will no longer be displayed in the folder view.
   To use a disabled email account again, select **Enable**.

User interface:

The E-Mail folder view (p. 70)

Related topics:

Editing the primary E-Mail account (p. 309)
Viewing, editing, deleting accounts (p. 311)
Using Unified Mail (p. 107)
Selecting the sender address when sending (p. 81)

11.4.3 Viewing, editing, deleting accounts

Depending on the configuration and the account type, you can edit different account settings:

- for email accounts: account name, sender name, Unified Mail usage, server parameters, folder names
  Note: Depending on the configuration, you might not be able to edit your primary email account.
- for social networks: account name

How to view, edit or delete accounts:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Accounts** in the left pane.
   Click on **Your accounts**.
   Click on **Edit** next to an account. The settings are displayed in an editing window.
   If you use several services from the selected provider, the editing window shows an overview of the services.
3. 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.

Further options in the editing window:

- Depending on the account type, you can open the respective folder in the corresponding app by clicking on the name of the service.
- If you no longer want to access an account from within the groupware, you can delete this account. To do so, click the **Delete** icon × next to an account.

Related topics:

Editing the primary E-Mail account (p. 309)
Disabling or enabling functional email accounts (p. 310)
Adding a Portal widget for social networks (p. 63)
Adding E-Mail Accounts (p. 123)
Using Unified Mail (p. 107)
Selecting the sender address when sending (p. 81)
Adding Storage Accounts (p. 283)

11.5 Using Categories

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

Learn how to use categories [13] that allow you to organise email messages, appointments, contacts and tasks across apps, independently from the folder structure. You e.g. can use your own category for a specific project or customer.

Categories have the following properties:

- A category consists of a name and a colour.
- You can create, edit and delete your own categories.
  Depending on the configuration, specific categories are predefined. Such categories can neither be edited nor deleted.
- You can assign a category or several categories to email messages, appointments, contacts and tasks and delete them later.
  Note: For email messages, you can also use inbox tabs. A specific inbox category can be assigned to an email. The category depends on the sender, see Working with inbox categories (p. 99).
- If you are searching for objects in an app, you can use categories as search terms.
- You can browse categories to find objects to which a specific category has been assigned in any app.

The following options are available:

- Managing categories (p. 313)
  Create, edit or delete your own categories with which you can mark email messages, appointments, contacts or tasks.
- Browsing categories (p. 314)
  Find all email messages, appointments, contacts and tasks that have been marked with the same category.

11.5.1 Managing categories

The following options are available:

- create your own category
- edit your own category
- delete your own category

How to manage your categories:

1. Click the **Settings** icon on the right side of the menu bar. Click on **All settings**. The *Settings* window opens.
   Click on **Basic** in the left pane. Click on **Manage categories** below **Advanced settings**.
   You can also use one of the following methods:
   - Select an email. Click the **Add category** icon in the tool bar. Select **Manage categories**.
   - Open the editing window for appointments, contacts or tasks by creating or editing an appointment, a contact or a task.
     To do so, click on **Add category** next to **Categories**. Select **Manage categories**.

   The *Manage categories* window opens.
2. To create a new category, click on **New category**.
   Enter a name in the *New category* window. Select a colour and an icon.
3. In order to edit a category, click the **Edit** icon next to the category.
4. In order to delete a category, click the **Delete** icon.

Related topics:

Organising email messages with categories (p. 102)
Organising appointments with categories (p. 173)
Organising contacts with categories (p. 221)
Organising tasks with categories (p. 247)

11.5.2 Browsing categories

To find objects that have been marked with a specific category, you can browse the categories. You will be presented with all email messages, appointments, contacts and tasks that have been marked with the same category. The following options are available:

- browse categories while displaying an object
- browse categories by opening the category browser

How to browse categories while displaying an object:

1. Select an object to which a category has been assigned. The following options are available:
   - If having selected an email, an appointment in the list view, a contact or a task, click on a category in the detail view.
   - If having selected an appointment in a calendar view, click on a category in the pop-up.

   The *Browse categories* side bar will be displayed. In the side bar, all objects are displayed to which the category selected has been assigned. Per app, a maximum of five objects will be displayed.
2. Use the following functions:
   - To show the details of an object in the pop-up, click on the object in the side bar.
     To edit the object, use the functions in the pop-up.
   - If more than five objects per app will be found, the **Show all** button will be displayed below the objects.
     To display all objects that have been found for an app, click on **Show all**. The objects will be displayed in the respective app as a search result.

How to browse categories by opening the category browser:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **Browse categories**.

   The *Browse categories* side bar will be displayed. It will not contain any objects as no category has been selected.
2. To display the objects of a specific category, select at least one category in **Categories**. You can also select one of the previously used categories.

   In the side bar, all objects are displayed to which the selected category has been assigned. Per app, a maximum of five objects will be displayed.
3. Use the following functions:
   - To show the details of an object in the pop-up, click on the object in the side bar.
     To edit the object, use the functions in the pop-up.
   - If more than five objects per app will be found, the **Show all** button will be displayed below the objects.
     To display all objects that have been found for an app, click on **Show all**. The objects will be displayed in the respective app as a search result.

Related topics:

Organising email messages with categories (p. 102)
Organising appointments with categories (p. 173)
Organising contacts with categories (p. 221)
Organising tasks with categories (p. 247)

11.6 Downloading Personal Data

Depending on the configuration, you can download your personal data within the groupware:

- email messages received and sent
- contacts, appointments, tasks
- the data in Drive

Notes:

- Depending on the data volume, the download can take a while.
- The data are delivered in common data formats.
- The data are downloaded as zip archive.

How to download your personal data:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. In the left pane, click on **Download personal data**.
3. Select the apps whose data should be downloaded. You can use different options for the specific apps.
   Click on **Request download**.
   While the data are being zipped to an archive, you can continue with your work.
   In order to cancel the process, click on **Abort download request**.
4. You will get an E-Mail as soon as the archive can be downloaded. Click on **Download** in the E-Mail.
   The *Download your personal data* page will be displayed again. Click the **Download** icon.
   Note: On top of the page you can see how long the zip archive will be available. After this period, the archive will be automatically deleted.

Options:

- For each app, you can define whether specific folders should be downloaded as well. To do so, click on **Options** below the app. The following options are available:
  - E-Mail
    Define the E-Mail folders that should be downloaded.
    In case you also want to download folders that you are currently not subscribed to, enable **Unsubscribed folders**.
    Then, all folders will be downloaded that are currently shared with you or that are included in your primary E-Mail account, even if those folders are not visible in the folder tree.
  - Calendar
    Define the calendars that are to be downloaded in addition to your private calendars.
    In case you also want to download shared calendars that you are no longer subscribed to, enable **Unsubscribed calendars**.
    Then, all calendars will be downloaded that are currently shared with you even if those calendars are not visible in the folder tree.
  - Address Book
    Define the address books that are to be downloaded in addition to your private address books.
  - Drive
    Define the folders that are to be downloaded in addition to your private address folders.
    In order to not only download the current version but all versions of a file, enable **Include all file versions**.
  - Tasks
    Define the task lists that are to be downloaded in addition to your private task lists.
- If the zip archive exceeds a certain file size, it will be split in several zip files. In **Maximum file size**, you can set the maximum size of the single zip files.

Note: The zip archive will be ready for download on the server for a specific period. If you request your data a second time within this period, the current zip archive will be deleted on the server.

Related topics:

Saving email messages (p. 105)
Exporting appointments (p. 175)
Exporting contacts (p. 224)
Exporting tasks (p. 249)

Subscribing to shared or personal E-Mail folders (p. 300)
Subscribing to public and shared calendars (p. 167)
Subscribing to public and shared address books (p. 218)
Subscribing to public and shared task lists (p. 244)

12 Data Security

Learn how to increase the data security when working with the groupware.

- Protect your data against unauthorised access.
- Minimise the threat of malware.
- Prevent the reception of unwanted messages.

Topics:

- Displaying or Signing Out from Active Clients (p. 318)
  You can display active clients and sign out of them if required.
- Using Application Passwords (p. 319)
  You can create and manage additional passwords to use with other devices.
- Multi-Factor Authentication (p. 320)
  You can set up a 2-step verification for the login.
- Externally Linked Images in E-Mail Messages (p. 326)
  You can define whether externally linked images in E-Mail messages are automatically loaded and displayed.
- Signing out Automatically (p. 327)
  You can define whether you are automatically signed out.

In addition, you can encrypt your E-Mail messages and files. Information on encryption can be found in Encrypting Data with Guard (p. 329)

12.1 Displaying or Signing Out from Active Clients

You can be logged in to your groupware account with different devices on various clients simultaneously, e.g. with desktop browsers, tablets, smartphones. With each login, an active session [16] is created on the groupware server. On the following occasions it can make sense to list active sessions and to terminate them if required:

- You want to check whether you are logged in to a certain device or client.
- You want to log out from a certain device.
- You want to prevent reaching the maximum number of allowed sessions as you then could no longer log in from an additional device.

The following options are available:

- display all active clients
  Note: Email clients that are connected to the groupware server via IMAP will not be displayed.
- terminate single sessions
- terminate all sessions except the current one

How to edit the active clients:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Security** in the left pane.
   Click on **Your devices** in the right pane.
   All devices will be listed which you are currently signed in with.
3. In order to terminate sessions, do one of the following:
   - In order to terminate a single session, click on **Sign out** next to the client.
   - To terminate all sessions except the active one, click on **Sign out from all devices**.

Related topics:

Signing out Automatically (p. 327)
Externally Linked Images in E-Mail Messages (p. 326)
Using Application Passwords (p. 319)

12.2 Using Application Passwords

In addition to your groupware login method, you can use additional application passwords that are limited for certain apps and devices. This method has the following advantages:

- The clients can access specific groupware functions only. This enhances the security for the user.
- In the groupware settings you can view the clients and devices you created passwords for.
- You can delete passwords and prevent a client access, e.g. when losing a device.

The following options are available:

- create a new application password for a specific app
- show or delete existing application passwords

How to use application passwords:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Security** in the left pane.
   Click on **Application Passwords**.
3. In the **Application** drop-down below **Add passwords**, select the app for which you want to add a password.
   Enter a name for the new password in **Password name**. This name is later used for displaying the app's credentials.
4. Click on **Add new password**.
   The *Password Created* window opens. It shows the user name for the login and an automatically created password. You can use those credentials to sign in to the selected app.
   Notes:
   - This password is only valid for the selected app.
   - This password will only be displayed once. As soon as you close the window, you can no longer display the password.
5. To delete a password for a specific app, identify the password below **Existing passwords**. Click the **Delete** icon × next to the password.
   To sign in to this app in the future, either use your groupware credentials or create another password for this app.

Related topics:

Signing out Automatically (p. 327)
Externally Linked Images in E-Mail Messages (p. 326)

12.3 Multi-Factor Authentication

By default, you only log in to the groupware with your username and password. Depending on the configuration, you can increase the security when logging in by using an additional authentication that is executed after the usual login. This procedure is generally called multi-factor authentication.

The additional authentication is done by verifying your identity with a device owned by you. You have the following options to verify your identity:

- Google Authenticator
  You need to install an app on your mobile device to get an auto-generated code. You need to enter this code to confirm your identity.
- Yubikey, Google Security Key or compatible FIDO device
  With a security key that is connected with your computer via USB or wirelessly, your identity will be verified during the login.
- Send code via SMS
  An SMS with a code will be sent to your mobile device. You need to enter this code to confirm your identity.

The following options are available:

- Setting up verification methods (p. 321)
- Verifying a login by using an authenticator app (p. 323)
- Verifying the login with a security key (p. 323)
- Verifying the login with an SMS code (p. 324)
- Recovering verifications (p. 324)
- Managing verification methods (p. 325)

12.3.1 Setting up verification methods

Prior to being able to use a 2-step verification for the next login, you have to set up the additional verification methods wanted. The following options are available:

- Set up verification methods
- As soon as having set up an initial verification method, you have to set a recovery method. You need the recovery e.g. in case you have lost your device that you use for the verification.
  In this case, you can log in to the groupware by using the recovery method.

How to set up verification methods:

1. Click the **Settings** icon in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Security** in the left pane.
   Click on **2-step verification**.
3. Click on **Add verification option**.
   The *Add verification option* window opens. Depending on the configuration, various verification methods will be available.
4. Setting up a verification by using an Authenticator App:
   a. Install Google Authenticator or compatible app on the mobile device that you want to use for the verification.
      Launch the app.
   b. Click on **Google Authenticator or compatible** in the *Add verification option* window.
   c. The *Authenticator registration* window displays a QR code. Scan the QR code with the Authenticator app on the mobile device.
   d. The app on the mobile device displays a code. Enter this code in the *Authenticator registration* window.

   When having set up the initial verification method, the *Add recovery option* window is displayed. In the following instruction, you will learn how to add a recovery method [322].
5. Set up a verification with a security key:
   Note: Depending on the browser, this verification method might not be supported.
   a. Connect your security key with your computer. Depending on the security key, a USB or wireless connection is used.
   b. Click on **Yubikey, Google Security Keys or compatible FIDO device** in the *Add verification option* window.
   c. Activate your security key e.g. by pressing a button on the security key.

   When having set up the initial verification method, the *Add recovery option* window is displayed. In the following instruction, you will learn how to add a recovery method [322].
6. Setting up a verification via text message:
   a. Click on **Code via text message** in the *Add verification option* window.
   b. The *Add Multifactor Device* window opens. Enter your mobile phone number.
   c. Shortly after, you will receive a text message with a code. Enter this code in the *Confirm Code* window.

   After having set up the initial verification method, the *Add recovery option* window opens. In the following instruction, you will learn how to add a recovery method [322].

How to add a recovery method in the *Add recovery option* window:

1. Setting up a recovery via text message:

   Note: When having selected the verification via text message as initial verification method, you have to enter another mobile device for a recovery via text message.

   a. Click on **Code via text message**.

   b. The *Add Multi-factor Device* window opens. Enter the phone number of the mobile device that you want to use for a recovery.

   c. Shortly after, you will receive a text message with a code. Enter this code in the *Confirm Code* window.

2. Setting up a recovery via recovery code:

   a. Click on **Backup code to access your account**.

   b. The *Recovery code* window opens. It displays a code that can be used for the recovery.

   c. In order to print the recovery code, click on **Print**.

      In order to save the recovery code as a text file, click on **Download**. In case of a recovery, you can import the recovery code from this text file.

Related topics:

Verifying a login by using an authenticator app (p. 323)
Verifying the login with a security key (p. 323)
Verifying the login with an SMS code (p. 324)
Managing verification methods (p. 325)

12.3.2 Verifying a login by using an authenticator app

This verification method works as follows:

- Use a code that is created by an app on your mobile device.
- The code is valid for 30 seconds. As soon as the time expires, a new code is automatically displayed which again is valid for 30 seconds.
- When logging in, you have to use the same authenticator app that you used for setting up the verification method.

How to verify your identity with an authenticator app:

1. Launch the authenticator app on your mobile device.

   If the app displays multiple services, select the service that you use for verifying the groupware login.
2. Log in to the groupware with your username and password.
3. If having set up multiple verification methods, the *Select 2-step verification method* window opens. Select **Google Authenticator**.

   The *2-Step Verification* window opens. In **Authentication Code**, enter the code that is currently displayed by the app on your mobile device.

Related topics:

Verifying the login with a security key (p. 323)
Verifying the login with an SMS code (p. 324)
Setting up verification methods (p. 321)

12.3.3 Verifying the login with a security key

This verification method works as follows:

- Use a security key that you connect with your computer via USB or wirelessly.
- While signing in, you are prompted to activate the security key e.g. by pressing a button on the security key.

Note: Depending on the browser, this verification method might not be supported.

How to verify your identity with a security key:

1. Connect your computer with the security key.
2. Log in to the groupware with your username and password.
3. If having set up multiple verification methods, the *Select 2-step verification method* window opens. Select **Yubikey, Google Security Keys or compatible FIDO device**.

   The *Confirm Code* window opens.

   Activate your security key.

Related topics:

Verifying a login by using an authenticator app (p. 323)
Verifying the login with an SMS code (p. 324)
Setting up verification methods (p. 321)

12.3.4 Verifying the login with an SMS code

This verification method works as follows:

- Use a code that you receive by SMS on your mobile device.
- The last digits of the mobile phone number of the device to which the SMS will be sent to, are displayed.

How to verify your identity with an SMS code:

1. Log in to the groupware with your username and password.
2. If having set up multiple verification methods, the *Select 2-step verification method* window opens. Select **SMS Code**.

   An SMS with a code will be sent to your mobile device.
3. The *2-Step Verification* window opens. Enter this code.

Related topics:

Verifying a login by using an authenticator app (p. 323)
Verifying the login with a security key (p. 323)
Setting up verification methods (p. 321)

12.3.5 Recovering verifications

You need the recovery e.g. in case you have lost the device that you use for the verification. In this case, you can log in to the groupware by using the recovery method.

How to log in using a recovery method:

1. Recovering with a recovery code:
   a. Click on **I lost my device** in the *2-Step Verification* or *Select 2-Step Verification Method* window.

      In a window, you are asked to enter the recovery code.
   b. Enter the recovery code.

      If you downloaded the recovery code as text file when having set up the recovery method, you can also click on **Upload recovery file**. Select the text file with the recovery code.
   c. Shortly after, you will receive an SMS with a 4-digit authentication code. Enter this code.
2. Recovering via an SMS code:
   a. Click on **I lost my device** in the *2-Step Verification* or *Select 2-Step Verification Method* window.

      In a window, you are asked to enter the recovery code.
   b. Shortly after, you will receive an SMS with a 4-digit authentication code. Enter this code.

Related topics:

Verifying a login by using an authenticator app (p. 323)
Verifying the login with a security key (p. 323)
Setting up verification methods (p. 321)

12.3.6 Managing verification methods

The following options are available:
- add a verification method
- change a verification device's name
- remove a verification device

You can set up and manage multiple verification methods but only one recovery method.

How to manage verification methods or verification devices:

1. In the menu bar, click the **Settings** icon ⚙. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Security** in the left pane.
   Click on **2-step verification**.
3. The following options are available:
   - **Edit**. Opens the *Edit multifactor device* window to change the name of the device.
   - **Delete** icon. Removes a verification device.
   - **Add verification option**. Adds a new verification method.

Related topics:

Setting up verification methods (p. 321)

12.4 Externally Linked Images in E-Mail Messages

External images are not part of the email itself. They are loaded from an external source upon reading the email. You can define whether those images are loaded and displayed. If you allow loading externally linked images, your privacy and computer are endangered by the following security issues:

- The sender can gather information, e.g. whether your E-Mail address is valid or when you retrieved the E-Mail. Such information can e.g. be used to purposefully send spam E-Mail messages.
- The externally linked graphic can be used to infect your computer with malware.

How to define the loading of externally linked images:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Security** in the left pane.
   Click on **External images in emails** in the right pane.
3. Define the behaviour.
   - If externally linked images are to be loaded and displayed, enable **Always show external images**.
   - If you always want to be asked whether externally linked images should be displayed, enable **Ask before showing external images**.
   - You can specify that externally linked images are always displayed if they come from specific senders. To do so, enter the email addresses of these senders in the input field below **Always show external images for the following senders**.

Related topics:

Signing out Automatically (p. 327)
Displaying or Signing Out from Active Clients (p. 318)
Using Application Passwords (p. 319)
Viewing Email Messages (p. 77)

12.5 Signing out Automatically

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

How to define whether you are automatically signed out:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Security** in the left pane.
   Click on **Advanced Settings** in the right pane.
3. Select an entry from the **Automatic sign out** drop-down.

Related topics:

Externally Linked Images in E-Mail Messages (p. 326)
Displaying or Signing Out from Active Clients (p. 318)
Using Application Passwords (p. 319)

13 Encrypting Data with Guard

Learn how to encrypt your data with Guard.

- Encrypt your email conversation.
- Encrypt your files. Share the encrypted data with other users.
- Use the security options to define the encryption level.
- The encrypted data are password-protected. Depending on the configuration, you can reset your password if forgotten.

Topics:

- Setting up Guard (p. 330)
- Encrypting E-Mail Conversations (p. 331)
- Encrypting E-Mail Conversations with Autocrypt (p. 334)
- Encrypting or Decrypting Files (p. 338)
- Encrypting Office Documents (p. 342)
- Signing Out from Guard (p. 345)
- Password Management (p. 346)
- Key Management (p. 349)
- GuardSettings (p. 355)

Information on additional security-related topics can be found in Data Security (p. 317).

13.1 Setting up Guard

Prior to being able to use Guard, you have to apply some basic settings:

- You have to enter a Guard security password that is used to encrypt data and to access encrypted data.
- Enter a secondary email address that is used if you forget your Guard security password. In this case, use the function for resetting the Guard security password. A new password will then be sent to you. For security reasons, it is highly recommended to enter a secondary email address for this purpose. Otherwise the new password will be sent to your groupware email account.

There are two options for using the basic settings:

- Define the basic settings while initially using an encryption function.
- Define the basic settings in the groupware settings before using the encryption function.

How to define the basic settings when initially using an encryption function:

1. When composing an email, enable the encryption function by clicking the **Encrypt** icon.
2. You consecutively will be asked to enter a Guard security password and a secondary E-Mail address. Enter the data.

How to define the basic settings before initially using encryption:

1. Click the **Settings** icon in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Click on **Guard** in the left pane.
   When initially opening the Guard security settings, the *Guard Create Security Keys* window opens.
3. In the **Password** field, enter the password that you want to use for encrypting your data.
   Confirm the password in the **Verify** field by entering it again.
4. In the **Enter new secondary email** field, enter the email address that is used for receiving a temporary password for resetting your Guard security password.

13.2 Encrypting E-Mail Conversations

The following options are available:

- Reading encrypted E-Mail messages (p. 331)
- Sending encrypted E-Mail messages (p. 332)
- How can external recipients read an encrypted E-Mail? (p. 333)
- Encrypting incoming E-Mail messages by using a filter rule (p. 333)

13.2.1 Reading encrypted E-Mail messages

To be able to read an encrypted email, the Guard security password is required.

How to read an encrypted E-Mail:

1. Select an email with the **Encrypted** icon in the list view. In the detail view, the notification **Secure Email** will be displayed.

   Click on **Read email**. The *Password needed* window will be displayed.

   Note: If, when having entered your security password the last time, you set that Guard should remember the security password, the email will be displayed in plain text immediately.
2. Enter your Guard security password.

   You can define how long the security password should be remembered by Guard. To do so, select a time range in **Ask for password again**.

   In the **Guard Default Settings** section of the Guard settings, you can define a default value for the time range.
3. Click on **Confirm**. The content is shown in plain text.

   If the E-Mail includes attachments, functions for using the attachments' decrypted or encrypted versions will be displayed.

Related topics:

Sending encrypted E-Mail messages (p. 332)
How can external recipients read an encrypted E-Mail? (p. 333)

13.2.2 Sending encrypted E-Mail messages

The following options are available:

- Sending an encrypted email. Only you and the recipients can read the email content.
- Sending an E-Mail with a signature. The signature ensures that the recipient is able to recognise whether the E-Mail content has been changed in transport.
- Sending an encrypted E-Mail with a signature.

By default, Guard uses PGP encryption. Depending on the configuration, you can also use S/MIME. To do so, you have to use S/MIME encryption prior to the initial usage.

How to enable S/MIME encryption:

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

1. Click the **Settings** icon in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Click on **Guard** in the left pane. Click on **S/MIME** in the right pane.
3. Enable **Enable S/MIME**.
   If S/MIME encryption should be set as default, enable **Default to using S/MIME for signing and encryption** below **Defaults**.

How to send an encrypted E-Mail:

1. If S/MIME encryption is enabled, you can choose between S/MIME and PGP. To do so, click the **Options** icon ⋯ in the button bar of the email edit window.
   Below **Security**, select **Use PGP** or **Use S/MIME**.
2. Click the **Enable encryption** icon in the button bar.
   If you are not signed in to Guard, the window for entering the Guard security password opens. Enter the password.
   A function bar will be displayed above the email text. A text will be displayed within the function bar notifying you about the encryption of the email.
   Icons next to the recipients indicate whether the message can be encrypted for this recipient. If hovering over an icon, a description will be displayed.
3. In order to show further options, click on **Options** in the function bar.
   - In order to additionally sign the E-Mail, enable **Sign e-mail**.
   - To enable The E-Mail recipient to send an encrypted reply, the recipient needs to have your public key. You can send your public key as an attachment. To do so, enable **Attach my public key**.
   - When using PGP, the following option applies:
     You can set the PGP format if the **Show advanced settings when composing email** option has been enabled in the Guard settings under **Advanced**.
     By default, encrypted email messages are sent in **MIME** format. Some older email clients only support PGP/Inline. If the recipient uses such a client, enable **Inline**.
     Note: If you use **Inline**, you can not send E-Mail messages in HTML format.

   You can also use the **Options** menu ⋯ in the button bar to sign the email or to send your public key as attachment.
4. Click on **Send**.
   When sending to new recipients, a window is displayed that allows to send notes for opening the encrypted E-Mail to the recipients.

User interface:

The email editing window (p. 75)

Related topics:

Reading encrypted E-Mail messages (p. 331)
How can external recipients read an encrypted E-Mail? (p. 333)

Sending Email Messages (p. 79)
GuardSettings (p. 355)

13.2.3 How can external recipients read an encrypted E-Mail?

You can also send encrypted E-Mail messages to external recipients who are not groupware users. When adding an external recipient, Guard checks whether a public key is available for this E-Mail address. Depending on the result, Guard uses different procedures for sending the encrypted E-Mail:

- If there is a public key for the recipient:
  - The message will be sent encrypted using this key. The recipient can read the message with his/her private key.
- If there is no public key for the recipient:
  - If the external user already has a guest account, he/she will receive an email with the link to the login page of his/her guest account. When having logged in, he/she can read the encrypted email on the guest page. He/she can send an encrypted reply from this page.
  - If there is no guest account, a guest account will be created. The external recipient will receive an email with a link to a guest page and an automatically created password. The user logs in to the guest page. Then he/she can create an own password.
    Depending on the configuration, the automatically created password and the link to the guest page will be sent in separate emails.
  - Depending on the configuration, guest account email messages will be deleted from the server after a specific number of days.

  The external recipient can send an encrypted reply to the encrypted email. It is not possible to add additional recipients though.

Related topics:

Reading encrypted E-Mail messages (p. 331)
Sending encrypted E-Mail messages (p. 332)

13.2.4 Encrypting incoming E-Mail messages by using a filter rule

Depending on the configuration, you can automatically encrypt E-Mail messages by creating a respective E-Mail filter.

How to automatically encrypt incoming E-Mail messages:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Mail** in the left pane. Click on **Filter rules**.
3. Click on **Add new rule**. The *Create new rule* window opens.
   - Enter a rule name.
   - Click on **Add condition**. Make a selection from the drop-down menu. Complete the condition details.
   - Click on **Add action**. Select the encryption action from the menu. Complete the action details.
4. You can set whether subsequent rules are to be processed if the rule is met. To do so, enable or disable **Process subsequent rules**.
5. Click on **Save**.

Related topics:

Adding a condition (p. 116)
Adding an action (p. 117)

13.3 Encrypting E-Mail Conversations with Autocrypt

The Autocrypt standard has been developed to provide an automatic email encryption. This is done as follows:

- Each email sent includes the public key of the sender in the email header. This key will be imported automatically or manually by the recipient.
- PGP is used as encryption method.

Autocrypt has the following limitations:

- There is no check for automatically imported keys to see whether they are correct or fake.
- For this reason, an automatically imported key is not used for verifying the sender's signature.

To manage Autocrypt keys and verify them later, the following options are available:

- Importing Autocrypt keys (p. 335)
- Managing Autocrypt keys (p. 336)
- Transferring Autocrypt keys to other clients (p. 337)

13.3.1 Importing Autocrypt keys

In the **Advanced** section of the Guard settings, you can define whether Autocrypt keys are automatically imported. You can set the following:

- All Autocrypt keys received are automatically imported.
  An automatically imported key is used as follows:
  - An outgoing message to this contact can be encrypted with this key.
  - The signature of an incoming message from this contact will not be verified with the key. That means: It cannot be verified if the sender is real and the message content has been unaltered.
- For each Autocrypt key received you will be asked whether to import the key. Details of the Autocrypt key will be shown allowing you to check its validity. If you import the key, it will be regarded as verified.
  A verified key will be used as follows:
  - An outgoing message to this contact can be encrypted with this key.
  - The signature of an incoming message from this contact will be verified using the key. If the verification is successful, the sender is real and the message content is unaltered.

How to define how Autocrypt keys are imported:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Guard** in the left pane.
3. Enable **Show advanced settings**. Items for managing keys and for the Autocrypt settings will be displayed.
4. Below **Autocrypt**, proceed as follows:
   - To import Autocrypt keys, enable **Search incoming e-mail messages for keys in header**.
   - If you enable **Import autocrypt keys without asking**, Autocrypt keys will be imported automatically.
     This is the default setting if **Show advanced settings** is disabled.
   - If you disable **Import autocrypt keys without asking**, you will be asked whether you want to import the key. The key details are shown so that you can check the validity of the key. If you accept the key, it will be regarded as verified.

Related topics:

Importing Autocrypt keys (p. 335)
Managing Autocrypt keys (p. 336)
Transferring Autocrypt keys to other clients (p. 337)

13.3.2 Managing Autocrypt keys

The following options are available:

- Show a list of imported Autocrypt keys
  You can verify automatically imported Autocrypt keys later. A verified key will be used as follows:
  - An outgoing message to this contact can be encrypted with this key.
  - The signature of an incoming message from this contact will be verified using the key. If the verification is successful, the sender is real and the message content is unaltered.
- Delete Autocrypt keys

How to display the list of Autocrypt keys:

1. Click the **Settings** icon in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Guard** in the left pane.
3. Enable **Show advanced settings**. Items for managing keys and for the Autocrypt settings will be displayed.
4. Click on **Autocrypt Keys** below **Keys**. The *Autocrypt Keys* window opens. It displays a list of Autocrypt keys.
   To show details, click on a key ID.

How to verify an Autocrypt key in the *Autocrypt Keys* window:

1. Verify a key by comparing its displayed fingerprint with the correct fingerprint. You get the correct fingerprint from the sender of the E-Mail the key was imported from.
2. To verify the key, enable **Verified**.

How to delete an Autocrypt key in the *Autocrypt Keys* window:

1. Click the **Delete** icon next to a key.
2. Confirm that you want to delete the key.

Related topics:

GuardSettings (p. 355)
Importing Autocrypt keys (p. 335)
Transferring Autocrypt keys to other clients (p. 337)

13.3.3 Transferring Autocrypt keys to other clients

To decrypt messages received on another E-Mail client and to sign outgoing messages, you have to copy your private keys to the other client. To do so, you can use the Autocrypt transfer service. The Autocrypt transfer service sends you an E-Mail with your private keys. This E-Mail is encrypted with a 36 digit code.

How to transfer your Autocrypt keys to another client:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   The *Settings* window opens.
2. Click on **Guard** in the left pane.
3. Enable **Show advanced settings**. Items for managing keys and for the Autocrypt settings will be displayed.
4. Click on **Autocrypt Transfer Keys** below **Autocrypt**. The *Autocrypt Transfer Keys* window opens.
5. Enter your Guard password. Click on **Transfer**.
   A setup E-Mail with a passcode will be sent to your primary E-Mail address. The passcode will be displayed in the *Autocrypt Transfer Keys* window.
6. Open the setup E-Mail on the desired E-Mail client. Enter the passcode.

Related topics:

Importing Autocrypt keys (p. 335)
Managing Autocrypt keys (p. 336)

13.4 Encrypting or Decrypting Files

The following options are available:

- Encrypting files (p. 339)
- Uploading files securely by using encryption (p. 339)
- Opening encrypted files (p. 340)
- Downloading encrypted files (p. 340)
- Decrypting files (p. 341)

User interface:

The Drive tool bar (p. 257)

13.4.1 Encrypting files

Warning: When encrypting a file, only the current version of the file will be encrypted. Older file versions will be deleted. If you need to keep an older version, save it before encrypting the file.

How to encrypt a file:

1. Select one or several files in the display area of the Drive app.
2. Use one of the following methods:
   - Click the **Actions** icon ··· in the tool bar. Click on **Encrypt** in the menu.
   - Select **Encrypt** from the context menu.
   - Use the **More actions** icon ··· in the Viewer. Click on **Encrypt** in the menu.

Related topics:

Working with versions (p. 278)
Uploading files securely by using encryption (p. 339)
Opening encrypted files (p. 340)
Downloading encrypted files (p. 340)
Decrypting files (p. 341)

13.4.2 Uploading files securely by using encryption

You can upload local files securely by using encryption.

How to upload files securely by using encryption:

1. In the Drive app, open a folder in the folder view.
   Note: Open a folder for which you have the permission to create objects.
2. Click on **New**. Click on **Upload files (encrypted)**.
3. Select one or several files in the *Upload file* window.
   Click on **Open**. The current progress status will be shown in the display area.
   In order to cancel the process, click on **File details** at the bottom right side of the display area. Click on **Cancel** next to a file name in the *Upload progress* window.

Tip: You can also upload a new encrypted file by dragging a file from your operating system's desktop to the Drive app window and dropping it in the bottom part.

Related topics:

Encrypting files (p. 339)
Opening encrypted files (p. 340)
Downloading encrypted files (p. 340)
Decrypting files (p. 341)
Uploading Files or Folders (p. 269)

13.4.3 Opening encrypted files

You can open and read an encrypted file. The file remains encrypted on the server.

How to open an encrypted file:

1. In the Drive app, select an encrypted file in the display area. Click the **View** icon in the tool bar.
2. Enter your Guard security password in the *Password required* window.

   You can define how long the security password should be remembered by Guard. To do so, select a time range in **Ask for password again**.

   In the **Guard Default Settings** section of the Guard settings, you can define a default value for the time range.

   In the Guard default settings, you can define a default value for the time range.

Related topics:

Encrypting files (p. 339)
Uploading files securely by using encryption (p. 339)
Downloading encrypted files (p. 340)
Decrypting files (p. 341)

13.4.4 Downloading encrypted files

You can download an encrypted file in decrypted format to locally read or edit it. The file remains encrypted on the server.

How to download an encrypted file:

1. In the Drive app, select an encrypted file in the display area. Click the **View** icon in the tool bar.
2. Enter your Guard security password in the *Password required* window.

   You can define how long the security password should be remembered by Guard. To do so, select a time range in **Ask for password again**.

   In the **Guard Default Settings** section of the Guard settings, you can define a default value for the time range.
3. Click the **More actions** icon ⋯ in the Viewer. Click on **Download Decrypted**.

Note: If you click on **Download** in the tool bar or context menu, the downloaded file remains encrypted.

Related topics:

Encrypting files (p. 339)
Uploading files securely by using encryption (p. 339)
Opening encrypted files (p. 340)
Decrypting files (p. 341)

13.4.5 Decrypting files

You can remove a file's encryption by decrypting the file.

How to decrypt a file:

1. In the Drive app, select an encrypted file in the display area.
2. Use one of the following methods:
   - Click the **Actions** icon ⋯ in the tool bar. Click on **Remove Encryption**.
   - Select **Remove Encryption** from the context menu.
3. Enter your Guard security password in the *Password required* window.

   You can define how long the security password should be remembered by Guard. To do so, select a time range in **Ask for password again**.

   In the **Guard Default Settings** section of the Guard settings, you can define a default value for the time range.

Related topics:

Encrypting files (p. 339)
Uploading files securely by using encryption (p. 339)
Opening encrypted files (p. 340)
Downloading encrypted files (p. 340)

13.5 Encrypting Office Documents

The following options are available:

- Creating new encrypted documents (p. 343)
- Saving selected documents in an encrypted format (p. 344)
- Opening encrypted documents (p. 344)

Additional functions are available in the Drive app:

- encrypt [339] existing documents
- decrypt [341] documents

13.5.1 Creating new encrypted documents

When creating a new document, you have the option to create a document that will be saved encrypted. The following options are available:

- Create an encrypted document in the Text, Spreadsheet or Presentation app.
- Create an encrypted document on the document edit page.
  You can use this option if you are currently editing a document.

How to create a new encrypted document:

1. Launch the Text, Spreadsheet or Presentation app.
2. Click the **More actions** icon ⌵ in the button for creating objects. Select one of the functions **New text document (encrypted)**, **New spreadsheet (encrypted)** or **New presentation (encrytped)**.
3. Enter your Guard security password in the *Password required* window.

   You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

   In the **Guard Default Settings** section of the Guard settings, you can define a default value for the time range.

How to create a new encrypted document while editing a document:

1. Click on **New** in the **File** tool bar. In the menu, select one of these entries: **Text document (encrypted)**, **Spreadsheet document (encrypted)**, **Presentation document (encrypted)**.
2. Enter your Guard security password in the *Password required* window.

   You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

   In the **Guard Default Settings** section of the Guard settings, you can define a default value for the time range.
3. Click on **Unnamed** in the menu bar. Enter a name.

Related topics:

Saving selected documents in an encrypted format (p. 344)
Opening encrypted documents (p. 344)
Encrypting or Decrypting Files (p. 338)

13.5.2 Saving selected documents in an encrypted format

When having opened a text document, spreadsheet or a presentation, you can save this document in an encrypted format.

How to save the selected document in an encrypted format:

1. Open a document in the Text, Spreadsheet or Presentation app.
2. In the **File** tool bar, click on **Save in Drive**. Click on **Save as (encrypted)**.

   The *Save as (encrypted)* window opens. Select a folder and a file name. Click on **OK**.
3. Enter your Guard security password in the *Password required* window.

   You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

   In the **Guard Default Settings** section of the Guard settings, you can define a default value for the time range.

Related topics:

Creating new encrypted documents (p. 343)
Opening encrypted documents (p. 344)
Encrypting or Decrypting Files (p. 338)

13.5.3 Opening encrypted documents

You can open an encrypted document to do the following:
- read or edit the document
- download the document in decrypted format
- print the document as a PDF in decrypted format

The document remains encrypted on the server.

How to open an encrypted document:

1. Open a document in the Text, Spreadsheet or Presentation app.
2. Enter your Guard security password in the *Password required* window.

   You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

   In the **Guard Default Settings** section of the Guard settings, you can define a default value for the time range.
3. You can use the following functions:
   - Edit the document. Information can be found in the Documents user guide.
   - To download the document in a decrypted format, click the **Download** icon in the **File** tool bar.
   - To save the document as pdf in a decrypted format, click the **Print as PDF** icon in the **File** tool bar.

Related topics:

Creating new encrypted documents (p. 343)
Saving selected documents in an encrypted format (p. 344)
Encrypting or Decrypting Files (p. 338)

13.6 Signing Out from Guard

You can sign out from Guard without closing the groupware. To again display encrypted data after having signed out, you have to re-enter the Guard security password.

Note: This function is only available if you enable **Remember Password** when opening encrypted data.

How to sign out from Guard:

1. Click the **My account** icon in the menu bar.
2. Click on **Sign out Guard**.

13.7 Password Management

The following options are available:

- Changing the Password (p. 347)
- Resetting the password (p. 347)
- Removing the password reset function (p. 348)

Note: Depending on the configuration, some of those functions might not be available.

Related topics:

Key Management (p. 349)
GuardSettings (p. 355)

13.7.1 Changing the Password

Depending on the configuration, you can also use S/MIME for the encryption instead of PGP. For PGP and S/MIME, separate passwords will be used.

How to change the Guard password:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   Click on **Guard** in the left pane. Click on **Password Management (PGP)** or on **Password Management (S/MIME)** in the right pane.
   Note: Depending on the configuration, S/MIME might not be available.
2. In the **Old password** field, enter the password that you have previously used for encrypting your data.
   In the **New password** field, enter the password that you want to use for encrypting your data from now on.
   Enter the new password again in the **Confirm new password** field.
3. Click on **Change password**.

Related topics:

Resetting the password (p. 347)
Removing the password reset function (p. 348)
Key Management (p. 349)

13.7.2 Resetting the password

The following options are available:

- When having lost your Guard password, you can request a temporary Guard password by resetting the Guard password.
- You can define an email address for resetting the password.

How to reset the Guard password:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   Click on **Guard** in the left pane. Click on **Password Management (PGP)** or on **Password Management (S/MIME)** in the right pane.
   Note: Depending on the configuration, S/MIME might not be available.
2. To set a secondary email address to which a temporary password is sent, click on **Set email address for reset**. The *Secondary Email Address* window opens.
   Enter your current password. Enter the email address that you want to use for resetting the password.
3. Click on **Reset password**. The *Reset password* window opens.
   Click on **Reset**.

Result:

- A new password will be sent to your secondary E-Mail address.
  If not having entered a secondary E-Mail address, the new password will be sent to your primary E-Mail address.
- This new password is now your current Guard security password. You should immediately change this password.

Related topics:

Changing the Password (p. 347)
Removing the password reset function (p. 348)
Key Management (p. 349)

13.7.3 Removing the password reset function

To be able to reset your password if needed, your password has to be saved on the server in an encrypted version. If you do not want your password to be saved on the server, you can delete the password recovery.

How to remove the function for resetting the password:

Warning: If you remove the function for resetting the password, you can no longer reset your password. If you forget your password afterwards, you will not be able to decrypt your encrypted data.

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.

   Click on **Guard** in the left pane. Click on **Advanced** in the right pane.
2. Below **Reset options**, click on **Delete password recovery**. The *Delete Recovery* window opens.
3. Click the **Delete** button.

Related topics:

Changing the Password (p. 347)
Resetting the password (p. 347)
Key Management (p. 349)

13.8 Key Management

You can use the key management functions for the following purposes:

- You want to use your Guard PGP keys in other email clients, e.g. in local email clients.
- You have PGP keys from other PGP applications. You want to use those keys in Guard.
- You want to import your S/MIME certificates to use S/MIME encryption for your email messages. Note: Depending on the configuration, this function might not be available.
- You have an external contact's public key. In order to send encrypted messages to this external contact or verify received signed messages without having to access a key server, you want to import the partner's public key into Guard.
- You want to provide your public key to an external contact in order to allow the external contact to send encrypted messages to you without the need to access a key server.

The following options are available:

- Managing own PGP keys (p. 350)
- Managing PGP keys of recipients (p. 352)
- Managing own S/MIME keys (p. 352)
- Managing S/MIME keys of recipients (p. 354)

Related topics:

Password Management (p. 346)
GuardSettings (p. 355)

13.8.1 Managing own PGP keys

The following options are available:

- add new PGP keys
- display own PGP keys, display details
- manage own PGP keys: make current, edit IDs, revoke, download, delete

How to add a new PGP key:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   Click on **Guard** in the left pane. Click on **Your PGP keys** in the right pane.
2. The following options are available:
   - To create a new key pair, click on **Create New**. The *Create GuardSecurity Keys* window opens.
     Enter a password for the new key. Confirm the password.
     The new key consists of a master key and a corresponding sub-key.
   - To add an existing private key, click on **Upload Private Key**. Select a file containing a private key.
     The *Upload Private Keys* window opens.
     To upload the new key, enter your Guard security password. Enter a new password for the new key.
   - To add an existing public key, click on **Upload Public Key**. Select a file containing a public key.

   The new key will be entered on top of your key list. The new key becomes the current key.

How to view your existing PGP keys:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   Click on **Guard** in the left pane. Click on **Your PGP keys** in the right pane.
   Your PGP keys will be displayed.
   - Each PGP key consists of a master key and a subkey.
     - Among other things, the master key is used for signing your E-Mail messages.
     - The subkey will be used for encrypting and decrypting.
   - Depending on the requirement, Guard automatically uses the master key or the subkey.
2. To display details for a key, click the **Manage keys** icon ≡ next to a master key. The *Key Details* window opens.
   To view the key's signatures, click on **Signatures**.

How to manage your existing PGP keys:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   Click on **Guard** in the left pane. Click on **Your PGP keys** in the right pane.
   Your PGP keys will be displayed.
2. To download your public key to your computer, click on **Download my public key**.
3. Click the **Manage keys** icon ≡ next to a master key. Use the following functions.
   - If your key list contains more than one key, you can define the current key. To do so, click on **Mark current**. From now on, the current key will be used for encryption.
   - If you want to use the key for another email account, click on **Edit IDs**. The *Add User ID* window opens.
     Enter a name for the user ID. Enter the E-Mail address that you want to use for this key.
     Enter your password for this key.
   - To download a private key, click on **Download**.
     Define whether to download your private key only, your public key only or both keys.
     Caution: Your private key will be downloaded in encrypted form. You should not download your private key to a publicly accessible system, though.
   - In order to revoke or delete a private key, click on **Delete**. The *Delete Private Key* window opens.
     Notes:
     - if you revoke a key, it will no longer be used. But you can still decrypt objects that have been encrypted with this key. For this reason, revoking a key is better than deleting it.
     - **Warning:** If you delete a private key, you can no longer decrypt objects that have been encrypted with this key.

     The following options are available:
     - To revoke a private key, click on **Revoke**.
       Enter the password for the private key. If required, select a reason for revoking the key.
       Click on **Revoke**.
       You can also click on **Revoke** in the menu.
     - In order to delete a private key, click on **Delete**.
       Enter the password for the private key.
       Click the **Delete** button.

     When deleting a master key, the corresponding subkey will be deleted too.

Related topics:

Managing PGP keys of recipients (p. 352)
Managing own S/MIME keys (p. 352)
Password Management (p. 346)

13.8.2 Managing PGP keys of recipients

The following options are available:

- view or delete public keys
- upload public keys

How to display the PGP keys of recipients:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   Click on **Guard** in the left pane. Click on **Recipient PGP Keys** in the right pane.
   The public PGP keys of recipients will be displayed.
2. To show details for a key, click on the key ID.
   In order to delete a key, click the **Delete** icon 🗑 next to the key.

How to upload a recipient's public key:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   Click on **Guard** in the left pane. Click on **Recipient PGP Keys** in the right pane.
2. Click on **Upload Recipient Key**. Select a file containing a public key.

Related topics:

Managing own PGP keys (p. 350)
Managing own S/MIME keys (p. 352)
Password Management (p. 346)

13.8.3 Managing own S/MIME keys

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

The following options are available:

- add new S/MIME keys
  If you own several keys, you can define which key should be the current one. The current key is used for encrypting data.
- display own S/MIME keys, display details
- manage your S/MIME keys: make current, edit IDs, revoke, download, delete

How to add a new S/MIME key:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   Click on **Guard** in the left pane. Click on **S/MIME** in the right pane.
   Enable **Enable S/MIME**.
2. Click on **Upload private certificate**. The *Upload S/MIME Keys* window opens.
   Enter the following passwords:
   - Your Guard security password for uploading the new key.
   - A new password for encrypting email messages.
     Confirm the new password.

   Click on **OK**. Select a file with a valid S/MIME certificate.
   The new key will be entered on top of your key list. The new key becomes the current key.

How to view your own S/MIME keys:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   Click on **Guard** in the left pane. Click on **S/MIME** in the right pane.
   Enable **Enable S/MIME**.
2. To display details for a key, click the **Manage keys** icon ≡ next to a key. The *Key Details* window opens.
   To view the key's signatures, click on **Signatures**.

How to manage your existing S/MIME keys:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   Click on **Guard** in the left pane. Click on **S/MIME** in the right pane.
   Enable **Enable S/MIME**.
2. Click the **Manage keys** icon ≡ next to a key. Use the following functions.
   - If your key list contains more than one key, you can define the current key. To do so, click on **Mark current**. From now on, the current key will be used for encryption.
   - To download a private key, click on **Download**.
     Define whether to download your private key only, your public key only or both keys.
     Caution: Your private key will be downloaded in encrypted form. You should not download your private key to a publicly accessible system, though.
   - In order to revoke or delete a private key, click on **Delete**. The *Delete Private Key* window opens.
     Notes:
     - if you revoke a key, it will no longer be used. But you can still decrypt objects that have been encrypted with this key. For this reason, revoking a key is better than deleting it.
     - **Warning:** If you delete a private key, you can no longer decrypt objects that have been encrypted with this key.

     The following options are available:
     - To revoke a private key, click on **Revoke**.
       Enter the password for the private key. If required, select a reason for revoking the key.
       Click on **Revoke**.
       You can also click on **Revoke** in the menu.
     - In order to delete a private key, click on **Delete**.
       Enter the password for the private key.
       Click the **Delete** button.

Related topics:

Managing own PGP keys (p. 350)
Managing PGP keys of recipients (p. 352)
Password Management (p. 346)

13.8.4 Managing S/MIME keys of recipients

The following options are available:

- display public keys
- upload public keys

How to display a recipient’s SMIME key:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   Click on **Guard** in the left pane. Click on **S/MIME Recipients** in the right pane.
2. Enter an email address in **Search for Certificate**. Click on **Search**.
   If a certificate has been found, the certificate’s data will be displayed.

How to upload a recipient's public key:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   Click on **Guard** in the left pane. Click on **S/MIME Recipients** in the right pane.
2. Click on **Upload Recipient Certificate**. Select a file containing a public key.

Related topics:

Managing own PGP keys (p. 350)
Managing own S/MIME keys (p. 352)
Password Management (p. 346)

13.9 GuardSettings

How to open the Guard settings:

1. Click the **Settings** icon ⚙ in the menu bar. Click on **All settings**.
   You can also click on **Settings** in the App Launcher.
   The *Settings* window opens.
2. Click on **Guard** in the left pane.

The settings can be found in the following sections:

- Guard default settings (p. 356)
- Password Management (PGP) (p. 356)
- Password Management (S/MIME) (p. 356)
- Your PGP Keys (p. 356)
- Recipient PGP Keys (p. 356)
- S/MIME (p. 356)
- S/MIME Recipients (p. 356)
- Advanced (p. 356)

Also see: Searching for Settings (p. 38)

Guard default settings

- **Compose options**
  - **Encrypt draft email messages when composing encrypted email messages**
    Defines whether email drafts will be saved encrypted when composing an encrypted email.
  - **Default to send encrypted when composing e-mail**
    Defines whether a new E-Mail is encrypted by default.
  - **Default adding signature to outgoing email messages**
    Defines whether a new E-Mail is encrypted by default.
  - **Default to using S/MIME for signing and encryption**
    Defines whether S/MIME is used for signing and encryption by default.
    Note: Depending on the configuration, this function might not be available.
- **Remember password default**
  Defines the time range default for Guard to remember the password. You can change this default when being asked for your Guard password.

Password Management (PGP)

Contains functions for changing or resetting the PGP password.

See Password Management (p. 346)

Password Management (S/MIME)

Contains functions for changing or resetting the S/MIME password.

See Password Management (p. 346)

Your PGP Keys

Contains functions for managing your PGP keys.

See Managing own PGP keys (p. 350)

Recipient PGP Keys

Contains functions for managing PGP keys from recipients.

See Managing PGP keys of recipients (p. 352)

S/MIME

Note: Depending on the configuration, this function might not be available.
Contains functions for managing S/MIME type encryption.
See Key Management (p. 349)

S/MIME Recipients

Note: Depending on the configuration, this function might not be available.
Contains functions for displaying and adding S/MIME type recipient certificates.

See Key Management (p. 349)

Advanced

- **Show advanced settings for composing email**
  If this setting is enabled, you can define whether to use Mime or Inline as PGP format when sending encrypted email messages.
  See Sending encrypted E-Mail messages (p. 332)
- **Default to using PGP inline for new e-mail messages**
  - Defines whether PGP/Inline is used for encryption by default.
  - Only use those settings if the email client of a recipient does not support PGP. With PGP/Inline, the recipient can decrypt the message nevertheless.
  - If you use this setting, you can not send email messages in HTML format.
- **Autocrypt setting**
  - Configures the usage of Autocrypt for incoming E-Mail Messages. Allows you to transfer Autocrypt keys to other clients.
    See Encrypting E-Mail Conversations with Autocrypt (p. 334)
- **E-Mail cache**
  - Defines whether a decrypted E-Mail is kept in the browser cache in a readable format when displaying another E-Mail or changing to another groupware app.

To remove the decrypted E-Mail from the browser cache, enable **Do not keep e-mail messages decrypted.**.

- **reset options**
  - **Delete password recovery**. Deletes the function for recovering a lost password.
    Warning: If you remove the function for resetting the password, you can no longer reset your password. If you forget your password afterwards, you will not be able to decrypt your encrypted data.
    See Removing the password reset function (p. 348)

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