OX App Suite

User Guide

OX App Suite: User Guide

Published Friday, 15. February 2013 Version 7.0.1

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1 About this Documentation

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

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

1.1 Who is the target group for this documentation?

This documentation is addressed to the end user.

1.2 Which contents are included in the documentation?

This documentation describes working with a typical OX App Suite 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 OX App Suite software has a modularised structure consisting of individual applications, it is possible to purchase additional applications or functions through upgrades.

1.3 Design Elements

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

Buttons

Buttons or functions that can be clicked are highlighted in **bold**.

Example:

Click on **Compose new email**.

Label

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

Example:

The *Compose new email* page is displayed.

Key labels

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

Example:

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

Links

Links in the text appear in blue.

Example:

Details can be found in 6.4: Sending E-Mails (page 46).

Explanatory Text

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

Example:

You have the following options:

- Send a new E-Mail.
- Reply to an E-Mail.
- Forward an E-Mail.

Step by step instructions

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

Example:

How to answer an E-Mail:

1. Select an E-Mail in the sidebar.
2. Click on **Reply** in the display area next to the E-Mail header .
3. Enter the E-Mail text.
4. Click on **Send** in the command bar.

Result: The E-Mail is sent

Tips for making the work much easier

The tips for making work easier refer to actions that are optional e.g., alternatives to an instruction.

A tip is introduced with the word **Tip:**.

Example:

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

Malfunction note

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

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

Example:

Note: In order to add a signature, you need to have created one in the E-Mail settings.

Warning about loss of data or security risks

A data loss warning indicates an action that irrevocably deletes data as soon as the action is executed. A security risk warning indicates an action that possibly endangers the security of your data.

A warning is introduced with the word **Warning:**.

Example:

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

1.4 Terminology

This documentation uses the following terms.

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

1.5 Further Help

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

2 Getting started with the OX App Suite

The following information will help you get started with the OX App Suite .

- Which functions does the OX App Suite provide?
- Which system requirements have to be met by a local machine?
- What skills are required for handling the groupware?
- How do I sign in or sign out?

2.1 OX App Suite Definition

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

Applications

Organize the applications, like E-Mail or address book.

- Get an overview of the available applications.
- Enhance the OX App Suite by adding additional applications.

Learn more [31].

Portal

Your information centre for scheduled appointments, new E-Mails or messages from messaging platforms like Twitter, Facebook or online newspapers.

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

Learn more [37].

E-Mail

Send, receive and organize your E-Mails.

- Besides your internal E-Mail account use external E-Mail accounts that you have set up with other providers.
- Find E-Mails with the help of several search criteria. Follow E-Mail threads.
- Use E-Mail folders to organize your E-Mails. Co-operate with your team by sharing selected E-Mail folders.

Learn more [41].

Address Book

Organize and maintain your private and business contacts.

- Use the global address book to communicate with internal participants. Create personal address books to keep an overview of your contacts.
- Use contact folders to organize your contacts. Co-operate with your team by sharing selected contact folders.

Learn more [61].

Calendar

Keep an overview of your private and business appointments.

- Use individual or recurring appointments to schedule meetings and activities.
- Use calendar folders to organize appointments. Specify the team members who can access selected calendars.

Learn more [69].

Tasks

Schedule and organize your activities.

- Use the due date to organize your tasks. Use the reminder for tasks that are due.
- Manage your team by delegating selected tasks to others.
- Use the tasks folders to organize your tasks. Specify team members who can access selected tasks.

Learn more [95].

Files

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

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

Learn more [81].

Folders and permissions

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

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

Learn more [105].

2.2 System Requirements

In order to successfully work with the OX App Suite , your local machine has to meet the following system requirements.

Resolution/screen size

The minimum display resolution is 1024 x 768.

Browser

- Google Chrome, latest version

Browser settings

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

2.3 Operating Instructions

The following techniques are required:

- Using the left mouse button for clicking on elements
- Using drag and drop
- Multi-selection by pressing the <ctrl> key or the <cmd> key on Mac systems
- Working with several windows
- Opening, saving, and closing files
- Opening, closing, and selecting files in a folder tree

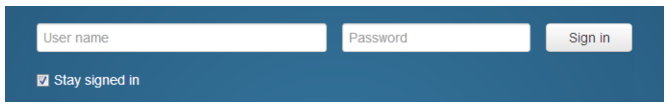
Information on these techniques can be found in your operating system documentation.

2.4 Signing in, signing out

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

How to sign in to the server:

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



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

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

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

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

- Selecting applications, e.g. Portal, E-Mail, Address book
- Further functions: organizing applications, refreshing data, opening the help section, signing out

At the bottom of the screen several useful bits of information are displayed.

- Your username
- Current date, current time

How to sign out:

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

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

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

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

3 First Steps

What you initially should do.

- Get familiar with the OX App Suite user interface
- Customize the OX App Suite basic settings.
- Check your personal contact data. Change or complete it, if required.
- For security reasons you should change your password.

3.1 The User Interface

The OX App Suite user interface includes the following components:

- A menu bar on the top.
- A toolbar to the left.
- The Folder tree can be found next to the toolbar.
- The remaining space is used for the sidebar and the display area.
- Depending on the action executed, the pop-up window or the notification area will overlap the display area.
- Text or user interface icons that can be clicked are displayed in blue.
- You can also use the keyboard to access the user interface functions.

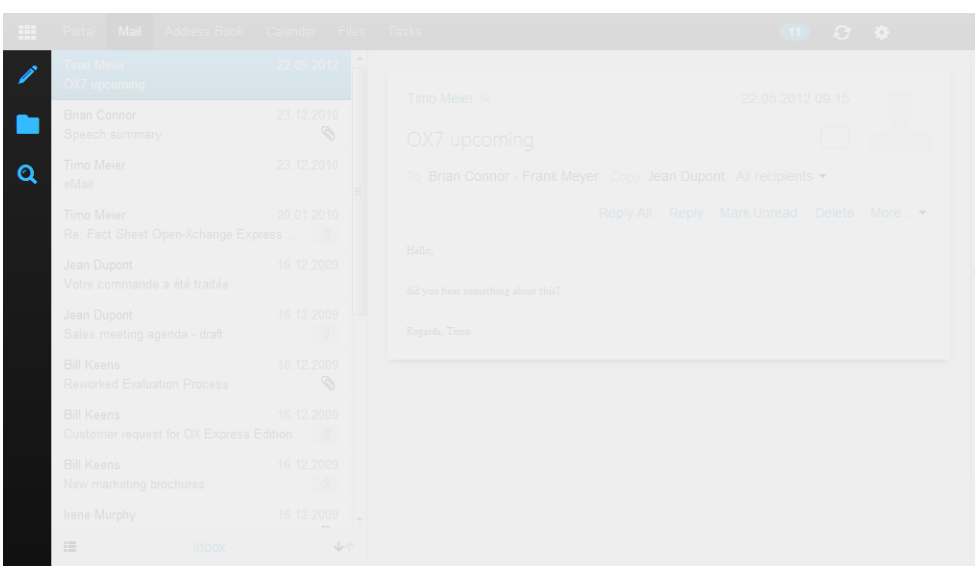
The following screen shots show the user interface, using the *E-Mail* application as an example.

Menu bar

Contains the following icons and buttons:

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

Toolbar

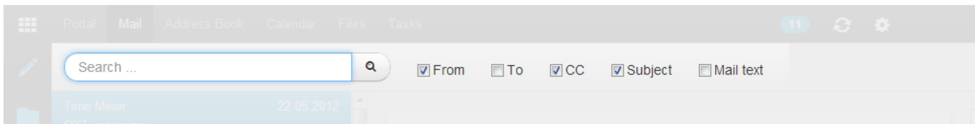


The toolbar is on the left. It contains the following icons:

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

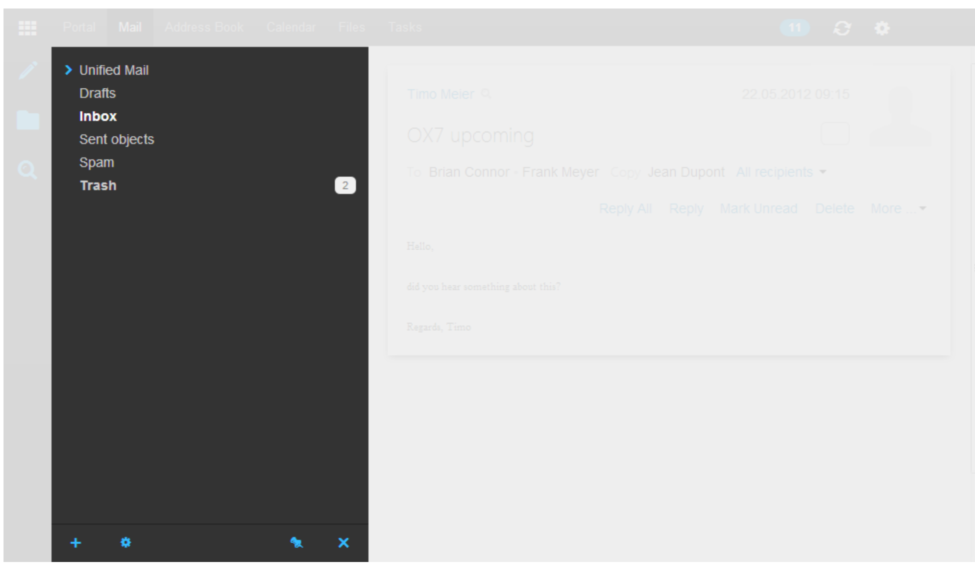
Depending on the application, further icons may be available e.g., an icon for selecting a view for the display area.

Toggle Search input field



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

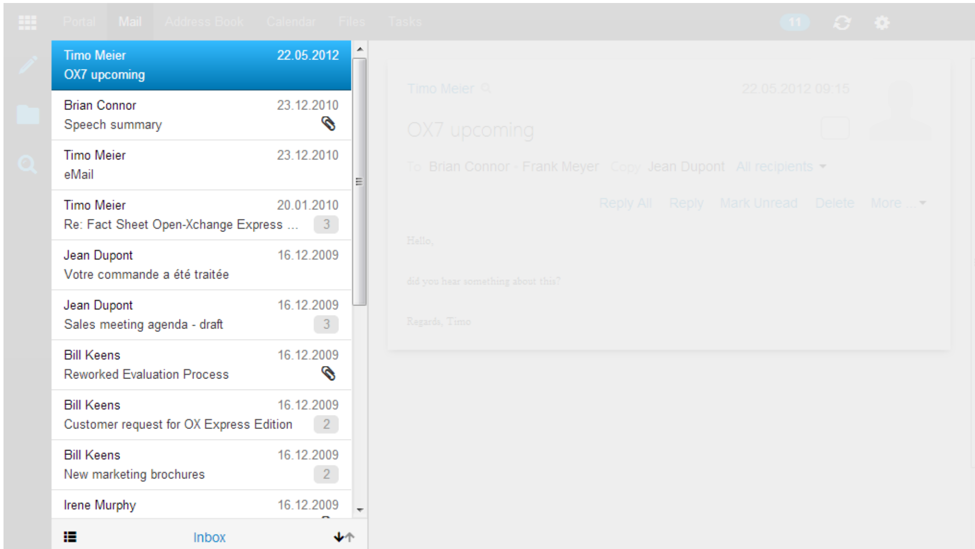
Folder tree



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

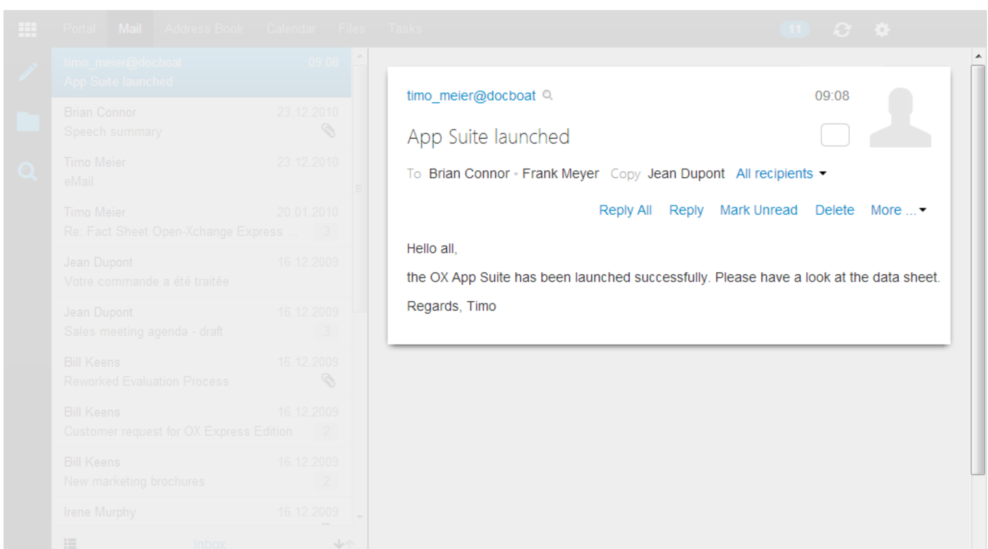
- an alphabetically sorted list of application specific folders
- depending on the application, sections for personal, public and shared folders
- a function bar containing the following:
  - **Add** icon and **Edit** icon. Provides functions for managing folders.
  - **Pin** icon. Defines whether the folder tree overlaps the sidebar or the display area or is displayed next to the sidebar or the display area.
  - **Close** icon. Closes the folder tree.

Sidebar



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

Display area

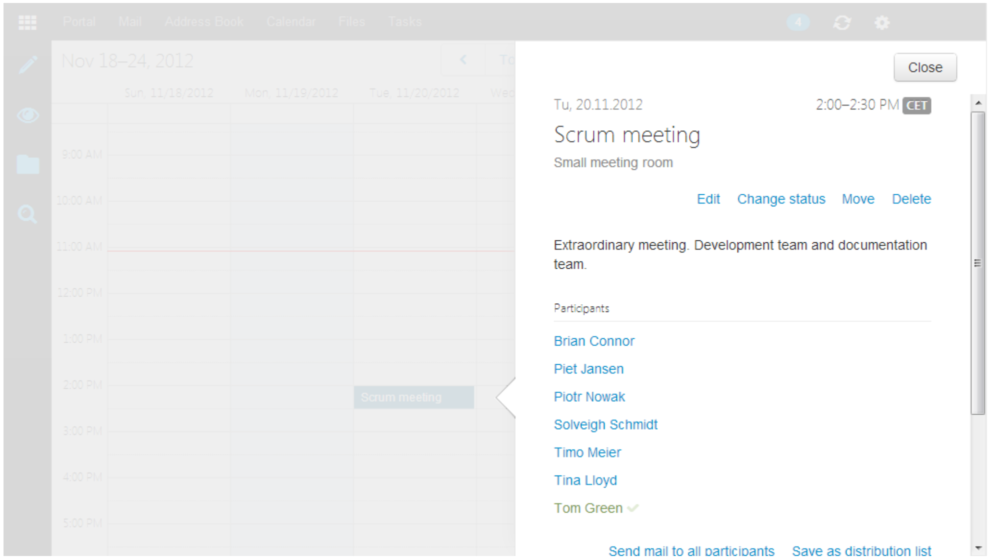


Depending on the application and the view selected, the display area shows the content of the object you selected in the sidebar or the content of the folder selected. If you selected an E-Mail, the display area shows the following elements:

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

Clicking on an object in the display area opens a pop-up window.

Pop-up

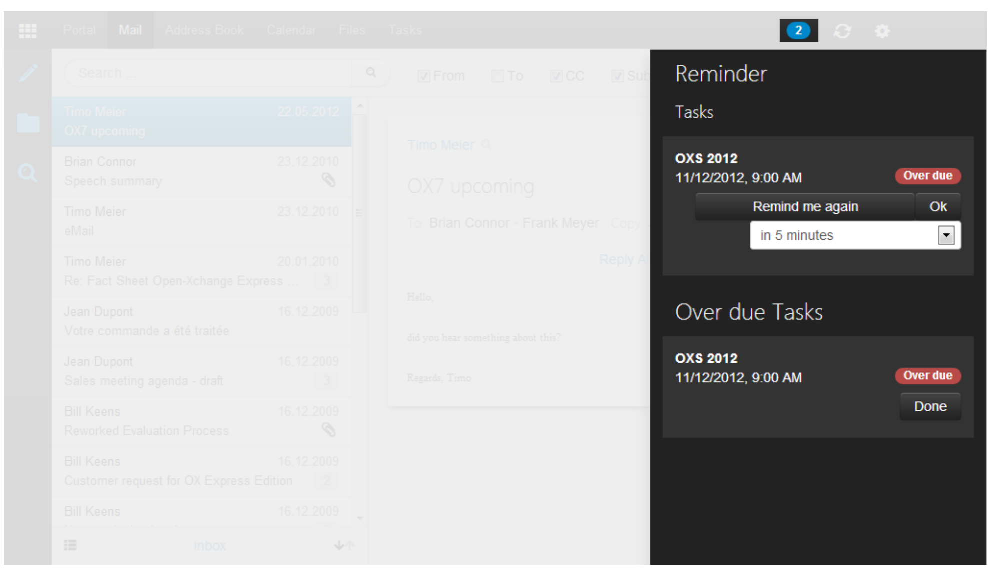


Displays detailed information about an object shown in the display area. In order to open the pop-up, click on a groupware object in the display area. If you read an E-Mail in the display area and click on the name of the sender, the following elements are displayed in the pop-up:

- the sender's contact data
- relevant information, e.g. your shared appointments or your E-Mail conversation with the sender
- buttons for certain actions, e.g. copying the sender's contact data to a folder.

If clicking on a certain element in the pop-up, an additional pop-up might be opened. In order to close a pop-up, click on **Close** in the upper right side. In order to close all pop-ups, click on **Close all**

Notification Area



Displays information about the following objects:

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

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

- To read a new E-Mail click on it.
- To open the inbox click on *Show Inbox*.
- To confirm new appointments click on the Confirm button.

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

Keyboard input

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

- In order to move the cursor within input fields, use the following keys: cursor keys, [Home], [End].
- In order to browse a list, use the cursor keys.
- In order to select a function, use the following keys: [Tab], [Shift]+[Tab]. The function selected will be highlighted.
- In order to execute the function selected, press [Enter].

3.2 Customizing the Basic Settings

How to customize the basic settings:

1. Click the **System menu** icon in the menu bar. Click the **Settings** menu item.
2. Click on **Basic settings** in the sidebar.
3. Change the Settings [27].

The following settings are available.

- Language
- Time zone
- Refresh interval
- Theme
- Default application after login?
- Automatically open notification area on new notifications

Language

Defines the user interface language.

Time zone

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

Refresh interval

Defines the interval for retrieving new objects from the server.

Theme

Defines the colour scheme for the user interface.

Default application after login?

Defines the application that is displayed after login.

Automatically open notification area on new notifications

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

3.3 Changing Personal Contact Data

How to change your personal contact data:

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

Tip: You can also change your personal contact data by clicking on **My contact data** in the *User data* portal square in the *Portal* application

3.4 Changing the password

How to change your password:

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

4 Applications

Learn how to work with *Apps*.

- the *Apps* components
- which *Apps* exist and what they offer
- launch an application like E-Mail or Address book,
- organize applications e.g., mark an application as a favourite
- extend functionality by installing a new application

How to launch *Apps*:

Click the **Apps** icon ▦ in the menu bar.

4.1 The Apps Components

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

On the *Your applications* page you will see:

- the **Manage applications** button. It launches the application manager that helps you Organize your apps.
- an overview of all available applications. To launch an application, click the application's icon.

4.2 The Application manager

Sidebar

Contains several application views:

- Your Apps. Offers views of
  - all installed applications
  - all applications that are marked as favourites
  - applications that install upgrades
- Categories. Offers views of
  - basic applications
  - productivity applications
  - development applications

The figure next to a view reflects the number of applications included in this view.

Display area

Displays the applications that are contained in the selected view. For each application the following information is displayed:

- icon, name, and origin of the application
- a description of the purposes for which you can use the application
- a button for launching the application
- a button for marking the application as favourite or for removing a label. An asterisk next to the name indicates that the application has been marked as favourite.

4.3 Which Applications do Exist?

Portal

The central information point for new E-Mails or messages from messaging platforms like Twitter, Facebook or online news. The content can be configured according to your needs.

E-Mail

Send, receive, and organize your E-Mails. Share E-Mails with other users. Keep the overview of all your E-Mail accounts with external providers.

Address Book

Organize and maintain private and business contacts. Use the contacts from your social networks. Share contacts with others.

Calendar

An overview of your private and business appointments. Organize meetings with internal users and external participants.

Files

Use the file store for centrally maintaining information or sharing information with others. Use the files in the office, at home, and on the road. Share files with users and external partners.

Tasks

Plan and organize your activities. Use the reminder function for due tasks. Delegate tasks to others.

4.4 Working with Applications

How to launch an application:

1. In order to view a certain selection of applications, click on a view in the sidebar.
2. Click on **Start** in the display area below the application.

Result: The *Apps* page will close. The application will be launched.

How to add an application to your favourites:

1. Click the **Installed** view in the sidebar.
2. Click on **Mark as favourite** in the display area below the application.

Result: The application is added to the *Favourites* view. An asterisk ★ will be added next to the application name.

How to do an upgrade:

1. Click on the **Upgrades** view in the sidebar.
2. Click on an entry in the display area below the application.

Result: The updated application is installed.

5 Portal

Learn how to work with the *Portal* application.

- the components
- customize the contents

There are several options for launching the *Portal* application:

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

Click the **Apps** icon ▦ in the menu bar. Click on **Portal** in the **Your applications** page.

5.1 Components

Signed in as

Displays the username that you used for signing in.

Customize this page button

Clicking on this displays a page that allows customizing [39] the Portal .

***Appointments* square**

Displays your current appointments. You can do the following:

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

***Inbox* square**

Displays new E-Mails. You can do the following:

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

***Tasks* square**

Shows unfinished tasks. You can do the following:

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

***User settings* square**

Includes links for the following functions:

- Changing your personal contact data
- Changing your password

***Quota* square**

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

Squares with *News widgets*

Display current messages from different message sources:

- Current messages from social networks like Facebook or Twitter
- Messages from RSS feeds
- Photos from web pages loke Flickr or Tumblr

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

5.2 Customizing the Portal

The following options exist:

- Changing the portal squares' order
- Adding portal squares
- Changing the portal squares' settings

5.2.1 Changing the portal squares' order

You can define the order of the squares.

How to change the portal squares' order:

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

5.2.2 Adding portal squares

You can extend the existing squares by adding new ones.

How to add new portal squares:

1. Click in the *Portal* App on the right above the **Customize this page**.
2. Click under *Portal settings* on *Add widget*. Select an entry.
3. Enter the required values. Click on **Save**.

Tip: In the *Files* app you can add a file as portal squre.

Tip: In the *E-Mail* app you can add an E-Mail as portal square.

5.2.3 Changing the portal squares' settings

How to use the portal squares settings:

1. Click the **System menu** icon in the menu bar. Click on **Settings** in the menu.
2. Click on **Portal** in the sidebar.
3. Change the Settings [39].

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

The following settings are available.

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

Edit button

Allows editing a square's settings, e.g. the url or description.
Note: This button is only available for certain squares.

Colour button

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

Disable button

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

Delete icon ×

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

6 E-Mail

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

- the *E-Mail* components
- search and view E-Mails
- send E-Mails
- manage E-Mails
- share E-Mails with other users
- access your external mail accounts that you have set up with other providers
- use the *E-Mail* settings

Use one of the following methods to launch the ***E-Mail*** application:

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

Open the **Apps** page and click on **E-Mail** below *Your applications*.

6.1 The E-Mail Components

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

Toolbar

Contains the following icons:

- **New** icon. Creates a new E-Mail [46].
- **Toggle Folder** icon. Opens or closes the folder tree.
- **Toggle Search** icon. Opens an input field for searching [106] for E-Mails with a certain sender or subject.

Folder tree

Displays the E-Mail folders. Allows navigation within the folder structure [107]. In order to open the folder tree, click on the **Toggle Folder** icon in the toolbar. The following functions are available:

- If clicking on a folder its E-Mails are displayed.
- The icons below the folders offer functions for organizing data [105] and for creating an external E-Mail account [56].
- The **Pin** icon defines whether the folder tree overlaps the sidebar or is displayed next to the sidebar or the display area.
- The **Close** icon closes the folder tree.

Sidebar

Displays a list of the E-Mails in the current folder. The view shows the sender, subject, date or time of receipt. If available, the following is displayed as well: attachments icon, coloured label or number of E-Mails in the thread. The following functions are available:

- If clicking on an E-Mail, its content is displayed in the display area.
- If clicking the **Thread** icon, all previous E-Mails from the E-Mail thread are displayed or hidden below the current E-Mail. If clicking on a previous E-Mail, its content is displayed in the display area.
- If clicking the **Select** icon below the list, a checkbox is displayed next to each E-Mail. You can select multiple E-Mails to edit them at once [52].
- The text below the list contains the name of the selected folder. Clicking on the name opens the folder tree.
- If clicking the **Sort** icon below the list a menu opens that helps you sort your E-Mails.

Display area

Displays the E-Mail's content and the functions available:

- Name of the E-Mail sender. If clicking on a name a pop-up opens. It includes the following components:
  - The person's contact data.
  - If the person's contact data are saved, the location of the data is displayed.
  - If you exchanged E-Mails with this person, they are displayed below *Recent conversations*.
  - If you share appointments with this person, they are displayed below *Shared appointments*.

  If clicking on an appointment or an E-Mail, an additional pop-up opens.
- If clicking the **Search** icon next to the sender's name, a search for E-Mails from this sender is launched.
- Date of receipt
- Subject
- **Label** [50] button. Opens a menu allowing you to assign a coloured label to the E-Mail.
- If the E-Mail is part of an E-Mail thread, the following is displayed: a number representing its position within the E-Mail thread, a slash and the number of E-Mails in the E-Mail thread. Number 1 is the oldest E-Mail.
- If the E-Mail was sent to several recipients, the following is displayed:
  - All other recipients. If clicking on a name, a pop-up opens.
  - **All recipients** button. If it is clicked on, the menu entries **Save as distribution list** [54]and **Invite to appointment** [54] are displayed.
- If the E-Mail contains attachments, the names of the E-Mail attachments [45] are displayed.
- Buttons: **Reply All**, **Reply** [47], **Forward** [48], **Mark Unread**, **Mark read** [49], **Delete** [51].

  If clicking on **More**, a menu opens with the following functions: **Move** [49], **Copy** [49], **View source** [50], **Reminder** [51], **Add to Portal** [51], **Save as file** [51].

  If the E-Mail is part of an E-Mail thread, additional buttons are shown in the display area on top. These buttons allow you to activate functions for all of the E-Mails in the thread [52].
- E-Mail text. Quotes from previous E-Mails are introduced with a vertical line. If clicking on the line or on **Show more**, the complete quote is displayed.

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

6.2 Displaying E-Mails

By default, the content of the inbox is displayed. Other E-Mail folders can be opened from within the folder tree.

How to display an E-Mail:

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

6.3 Viewing or Saving E-Mail Attachments

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

- displaying a preview of the attachment
- starting a slideshow if multiple pictures exist as attachments
- opening the attachment in a new tab
- downloading the attachment
- saving the attachment to *Files* [81]

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

How to use the E-Mail attachment functions:

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

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

6.4 Sending E-Mails

The following options exist:

- Sending a new E-Mail
- Replying to E-Mails
- Forwarding E-Mails

6.4.1 Sending a new E-Mail

In order to compose an E-Mail, you can do the following:

- Compose an E-Mail by entering the recipient, the subject and the E-Mail text
- Use other functions: send copies, add attachments, append vCard, request delivery receipt or set importance

How to send a new E-Mail:

1. Click the **New** icon in the toolbar.
2. Enter the recipient's E-Mail address in the *To* field of the sidebar. Press Enter.

   If there are several recipients, repeat the action. As an alternative, you can enter the name of a distribution list [65].

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

   Tip: While entering the E-Mail address, several matching suggestions are displayed. How to accept a suggestion:

   a. Accept a suggestion by using the cursor keys or the mouse.
   b. Press Enter.
3. Enter a subject.
4. Enter the E-Mail text.

   In order to compose the E-Mail in text format, click on **Text** next to *Text format*.

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

   a. Select the text content.
   b. Click an element in the formatting bar.
5. You can use additional functions: send copies, select sender address, add attachments, add signature, add vCard, request delivery receipt or set the priority
6. Click on **Send**.

Result: The E-Mail is sent.

How to use additional functions when sending E-Mails:

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

1. If you want to send copies of the E-Mail to other recipients, do the following:

   If the recipients are to see who gets a copy of the E-Mail, click on **Copy (CC) to**. Enter the E-Mail address of the copy's recipient.

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

   If there are several recipients, you can enter the name of a distribution list [65].

   In order to hide the input fields, click on **Copy (CC) to** or on **Blind copy (BCC) to**. The addresses entered will be kept.

2. If you have set up external E-Mail accounts [56], you can use those addresses as sender addresses. To do so, proceed as follows:

   Click on **Sender**.

   Select an E-Mail address from the list.

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

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

3. If you want to add attachments to the E-Mail, click on **Attachments**. Click on **Select files**. Select one or more files.

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

   In order to hide the input fields, click on **Attachments**. The attachments added will be kept.

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

4. If you have set up signatures, you can attach a signature to the E-Mail text. To do so, proceed as follows:

   Click on **Signatures**.

   Select a signature from the list.

   In order to hide the list, again click on **Signatures**.

5. In order to display additional options, click on **More** in the side bar. You can use the following options:

   - set the priority
   - request a receipt confirmation
   - attach your business card

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

6.4.2 Replying to E-Mails

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

How to reply to an E-Mail:

1. Select an E-Mail in the sidebar.
2. Click on **Reply** in the display area. To also reply to all other recipients click on **Reply All**.
3. Enter the E-Mail text. You can use additional functions e.g., E-Mail attachments.
4. Click on **Send**.

Result: The E-Mail is sent.

6.4.3 Forwarding E-Mails

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

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

How to forward an E-Mail:

1. Select an E-Mail in the sidebar.
2. In the display area click on **Forward**.
3. Select one or more recipients. Details can be found in How to send a new E-Mail: (page 46).
4. Enter the E-Mail text. You can use additional functions e.g., E-Mail attachments.
5. Click on **Send**.

Result: The E-Mail is sent.

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

6.5 Managing E-Mail messages

Some of the techniques for organizing E-Mails requires having all ready set up your own E-Mail folders. Information about creating folders can be found in Folders (page 107).

The following options exist:

- Moving E-Mails
- Copying E-Mails
- Marking E-Mails as read or unread
- Categorizing E-Mails with labels
- Showing the E-Mail source
- Enabling an E-Mail reminder
- Adding an E-Mail to the portal
- Saving E-Mails
- Importing E-Mails
- Working with E-Mail drafts
- Deleting E-Mail messages
- Editing multiple E-Mails at once
- Editing all the E-Mails in an E-Mail thread

6.5.1 Moving E-Mails

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

How to move an E-Mail:

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

1. Select an E-Mail in the sidebar.
2. Click on **More** in the display area. Select **Move** from the menu.
3. Select a folder in the *Move* window. Click on the **Move** button.

Tip: You can also move multiple E-Mails at once or all the E-Mails in an E-Mail thread.

6.5.2 Copying E-Mails

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

How to copy an E-Mail:

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

1. Select an E-Mail in the sidebar.
2. Click on **Copy** in the display area. Select **Copy** from the menu.
3. Select a folder in the *Copy* window. Click on **Copy**.

Tip: You can also copy multiple E-Mails at once or all the E-Mails in an E-Mail thread.

6.5.3 Marking E-Mails as read or unread

You can mark an individual E-Mail or a complete E-Mail thread as read or unread. Unread E-Mails will have a closed envelop icon in the sidebar.

How to mark an E-Mail as unread:

1. Select a read E-Mail in the sidebar.
2. Click on **Mark unread** in the display area.

In order to mark this E-Mail as read, click on **Mark read**.
Tip: You can also mark multiple E-Mails at once or all the E-Mails in an E-Mail thread as being read.

6.5.4 Categorizing E-Mails with labels

You can categorize an individual E-Mail or a complete E-Mail thread with a coloured label.

How to categorize an E-Mail with a label:

1. Select an E-Mail in the sidebar.
2. Click the **Label** icon in the display area.
3. Click on a label in the menu.

In order to remove the label, click on **None** in the **Label** menu.
Tip: You can also categorize multiple E-Mails at once or all the E-Mails in an E-Mail thread with a label.

6.5.5 Showing the E-Mail source

The E-Mail source contains the complete content of an E-Mail i.e., the complete E-Mail header data.

How to display the E-Mail source:

1. Select an E-Mail in the sidebar.
2. Click on **More** in the display area. Select **View source** from the menu. The source is displayed in the *View source* window.

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

6.5.6 Working with E-Mail drafts

The following options exist:

- saving an E-Mail as a draft while you are composing the E-Mail
- sending a saved E-Mail draft

How to save an E-Mail as a draft:

1. In the *Compose new email* window, click on *Save*.
2. In the menu, click on **Save as draft**.

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

How to send a saved E-Mail draft:

1. Open the *Drafts* folder.
2. Select an E-Mail draft in the sidebar.
3. Click on **Edit** in the display area.
4. Complete the entries. Click on **Send**.

6.5.7 Enabling an E-Mail reminder

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

How to activate the E-Mail reminder:

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

6.5.8 Adding an E-Mail to the portal

You can add an E-Mail as portal square to the portal.

How to add an E-Mail to the portal:

1. Select an E-Mail in the sidebar.
2. Click on **More** in the display area. Select **Add to portal** from the menu.

6.5.9 Saving E-Mails

You can save an E-Mail as a text file. The text file has the file extension EML.

How to save an E-Mail:

1. Select an E-Mail in the sidebar.
2. Click on **More** in the display area. Select **Save as file** from the menu.
3. Follow the instructions for saving the EML file.

6.5.10 Importing E-Mails

You can import an E-Mail that is available in the EML format.

How to import an E-Mail:

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

6.5.11 Deleting E-Mail messages

The following options exist:

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

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

How to delete E-Mail messages:

1. Select an E-Mail in the sidebar.
2. Click on **Delete** in the display area.

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

Tip: You can also delete multiple E-Mails at once or all the E-Mails in an E-Mail thread.

How to recover deleted E-Mails:

1. Open the *Trash* folder in the folder tree.
2. Select an E-Mail in the sidebar.
3. Click on **More** in the display area. Select **Move** from the menu.
4. Select a folder in the *Move* window. Click on *Move*.

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

How to permanently delete an E-Mail from the Trash folder:

Warning: Permanently deleted E-Mails can **not** be recovered. Before permanently deleting an E-Mail, make sure you no longer need the E-Mail.

1. Open the *Trash* folder in the folder tree.
2. Select an E-Mail in the sidebar.
3. Click on **Delete** in the display area.

Result: The E-Mail is permanently deleted.

6.5.12 Editing multiple E-Mails at once

The following functions can be applied to multiple E-Mails at once:

- forwarding E-Mails
- moving or copying E-Mails to another folder
- marking E-Mails as read or unread
- categorizing E-Mails with a label
- deleting E-Mails

How to apply a function to multiple E-Mails at once:

1. Click the **Select** icon ☰ below the sidebar. Each E-Mail will have a checkbox in the sidebar.
2. Check the boxes for at least two E-Mails.
3. Click on a function in the display area.

6.5.13 Editing all the E-Mails in an E-Mail thread

You can activate the following functions for all the E-Mails in an E-Mail thread at once:

- forwarding E-Mails
- moving or copying E-Mails to another folder
- marking E-Mails as read or unread
- categorizing E-Mails with a label
- deleting E-Mails

How to activate a function for all the E-Mails in an E-Mail thread at once:

1. Select the current E-Mail in the E-Mail thread in the sidebar. The current E-Mail is listed on top of the E-Mail thread.
2. Click on *Entire thread* on top of the E-Mail in the display area. Select a menu entry.

6.6 E-Mails within a Team

The following options exist:

- Sharing E-Mails
- Subscribing to E-Mail folders
- Inviting all E-Mail recipients to an appointment
- Saving all recipients of an E-Mail as a distribution list

6.6.1 Sharing E-Mails

You can share your E-Mails with internal users. Depending on the requirements, different methods can be applied.

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

6.6.2 Subscribing to E-Mail folders

In order to see E-Mail folders shared by other users, you have to subscribe to those folders.

How to subscribe to shared E-Mail folders:

1. Open the folder tree.
2. Click on the **Add** button below the folder tree. Click on **Subscribe IMAP folder**.
3. In the *Subscribe IMAP folders* window activate the checkboxes of the folders that you want to subscribe to. Click on **Save**.

6.6.3 Inviting all E-Mail recipients to an appointment

If there are several E-mail recipients, all recipients can be invited to a new appointment.

How to invite all E-mail recipients to an appointment:

1. Select an E-Mail from the sidebar.
2. Click on **All recipients** in the display area.
   Note: This button is only displayed if the E-Mail has multiple recipients.
3. Select **Invite to appointment** from the menu.
4. Complete the data for Creating an appointment [73].

6.6.4 Saving all recipients of an E-Mail as a distribution list

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

How to save the recipients of an E-Mail as a distribution list:

1. Select an E-Mail from the sidebar.
2. Click on **All recipients** in the display area.
   Note: This button is only displayed if the E-Mail has multiple recipients.
3. Select **Save as distribution list** from the menu.
4. Complete the data for Creating a distribution list [65].

6.7 External E-Mail Accounts

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

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

6.7.1 Setting up and editing external E-Mail accounts

The following options exist:

- setting up an external E-Mail account
- editing an external E-Mail account
- deleting an external E-Mail account

How to set up an external E-Mail account:

1. Click the **System menu** icon in the menu bar. Select **Settings** from the menu.
2. Click on **Keyring** in the sidebar.
3. Click on **Add** in the display area. Select **Mail Account** from the menu.
4. In the *Add mail account* window enter the E-Mail address used for the external E-Mail account. Enter the password for the external E-Mail account. Click on **Add**.
5. After a short while you will be informed that the external E-Mail account has been set up. Click on **Close**.

Now you can use the external E-Mail account.

Tip: You can also set up an external E-Mail account by clicking on the **+** button below the E-Mail folder tree. Select **Add E-Mail account** from the menu.

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

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

1. Click the **System menu** icon in the menu bar. Select **Settings** from the menu.
2. Click on **Keyring** in the sidebar .
3. Select an external E-Mail account in the display area below *Keyring*.
4. Click on **Select**. The settings are displayed in a pop-up.
5. Change the settings.
6. Click on **Save** at the bottom of the pop-up.

How to delete an external E-Mail account:

1. Click the **System menu** icon in the menu bar. Select **Settings** from the menu.
2. Click on **Keyring** in the sidebar.
3. Select an external E-Mail account in the display area below *Keyring*.
4. Click on **Delete**. Confirm that you want to delete the external E-Mail account.

6.7.2 Using an external E-Mail account

The following options exist:

- displaying the E-Mails of an external E-Mail account
- Send an E-Mail and enter the address of an external E-Mail account in the recipient field

How to display E-Mails of an external E-Mail account:

Prerequisite: You have set up an external E-Mail account.

1. Click on **E-Mail** in the menu bar.
2. In the folder tree, open the folder with the name of the external E-Mail account.

How to send an E-Mail from an external E-Mail account:

Prerequisite: You have set up an external E-Mail account

1. In the folder tree, open the folder with the name of the external E-Mail account.
2. Click on **Compose new email**.
3. Fill in the required fields for sending an E-Mail [46]. Click on **Send**.

6.8 E-Mail Settings

How to use the general E-Mail settings:

1. Click the **System menu** icon in the menu bar. Select **Settings** from the menu.
2. Click on **E-Mail** in the sidebar.
3. Change the Settings [58].

The following settings are available:

- Permanently remove deleted E-Mails?
- Automatically collect contacts in the "Collected addresses" folder while sending E-Mails?
- Automatically collect contacts in the "Collected addresses" folder while reading E-Mails?
- Append vcard?
- Insert the original E-Mail text into a reply?
- Forward E-Mails
- Format messages as
- Line wrap when sending text mails after
- Default sender address
- Auto-save E-Mail drafts?
- Allow HTML formatted E-Mail messages?
- Block pre-loading of externally linked images?
- Display emoticons as graphics in text E-Mails?
- Colour quoted lines?
- Signature

Permanently remove deleted E-Mails?

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

Automatically collect contacts in the "Collected addresses" folder while sending E-Mails?

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

Automatically collect contacts in the "Collected addresses" folder while reading E-Mails?

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

Append vcard?

Specifies whether your contact data will be attached to a new E-Mail in the vCard format.

Insert the original E-Mail text into a reply?

Specifies whether the original E-Mail text is appended to an E-Mail reply.

Forward E-Mails

Specifies how an E-Mail text is sent when forwarding the E-Mail:

When choosing the **Inline** option, the text is sent within the new E-Mail text body.

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

Format messages as

Defines the format in which E-Mails are sent:

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

If using the **Plain text** option, the E-Mail text is sent as plain text without formatting.

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

Line wrap when sending text mails after

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

Default sender address

Specifies the pre-set sender address for new E-Mails.

Auto-save E-Mail drafts?

Specifies the interval for saving an E-Mail while being composed to the *Drafts* folder. The **Disabled** option deactivates this function.

Allow HTML formatted E-Mail messages?

Specifies whether or not displaying HTML messages is allowed. In terms of bandwidth, HTML messages have a high impact and can be a high security risk as they can contain dangerous scripts.

Block pre-loading of externally linked images?

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

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

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

Display emoticons as graphics in text E-Mails?

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

Colour quoted lines?

Specifies whether original messages are highlighted and introduced with a vertical line. The messages or replies will be displayed as embedded. This option assumes that the original mail text is not attached but appended to the E-Mail.

Signature

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

- **Add** button. In order to create a new signature, click on this button. In the pop-up enter a name for the signature and the data. Click on **Save**.
- **Edit** button. In order to edit a signature, select a signature from the list. Click on **Edit**. Change the data in the pop-up. Click on **Save**.
- **Delete** button. In order to delete a signature, select a signature from the list. Click on **Delete**.

7 Address Book

Learn how to use the *Address Book* application.

- the *Address Book* components
- find and display contacts
- create and add contacts from various sources
- combine several contacts into distribution lists
- edit and organize contacts
- share contacts with other users

In order to launch the *Address Book* application use one of the following methods:

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

Click on **Address Book** on the **Apps** page below *Your applications*.

7.1 The Address Book Components

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

Toolbar

Contains the following icons:

- **Add** icon. Creates a new contact [64] or a new distribution list [64].

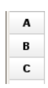
  Note: This function is only enabled if you opened an address book for which you have the appropriate permissions to create objects.
- **Folder** icon. Opens or closes the folder tree.
- **Search** icon. Opens an input field for searching [106] for contacts with a certain name.

Folder tree

Displays the contacts folders and enables you to navigate the folder structure [107]. In order to open the folder tree, click the **Toggle Folder** icon in the toolbar. The following functions are available:

- If clicking on a folder, its contacts are displayed.
- Icons below the folders offer functions for Organizing data [105].
- The **Pin** icon defines whether the folder tree overlaps the sidebar or the display area or is displayed next to the sidebar or the display area.
- The **Close** icon closes the folder tree.

Navigation bar



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

Sidebar

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

- If clicking on a contact its data is displayed in the Display area.
- If clicking the **Select** icon below the sidebar, a checkbox is displayed next to each contact. You can select multiple contacts to edit them at once [67].
- The text below the list contains the name of the selected folder. If clicking on the name, the folder tree opens.

Display area

Displays the contact data and the available functions:

- Picture, name, job position, profession
- Buttons: **Send mail** [66], **Invite to appointment** [66], **Edit** [66], **Delete** [67].

  If clicking on **More**, a menu with the following functions opens: **Move** [66], **Copy** [67].

  Note: Some buttons might not be displayed if you do not have the appropriate permissions.
- Business and private addresses
- Business and private phone numbers
- E-Mail addresses. If clicking on an E-Mail address a page for sending a new E-Mail [46] opens.
- **Show QR-code** buttons. If clicking on this, a QR code with some essential contact data is displayed.
- Navigation path to the selected folder.

The extent of information displayed can vary.

7.2 Displaying Contacts

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

How to display a contact:

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

7.3 Adding Contacts

The following options exist:

- Creating a new contact

7.3.1 Creating a new contact

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

How to create a new contact:

1. Open an address book in the folder tree.
   Note: Open an address book for which you have the appropriate permissions to create objects.
2. Click the **Add** icon in the toolbar. Click on **Add contact**.
3. Enter the data.
4. Click on **Save**.

7.4 Creating Distribution Lists

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

How to create a new distribution list:

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

7.5 Organizing Contacts

Some of the techniques for organizing contacts require that contact folders have already been set up by you. Information about creating folders can be found in Folders (page 107).

The following options exist:

- Sending E-Mails from within an address book
- Inviting contacts to an appointment
- Editing contacts
- Moving contacts
- Copying contacts
- Deleting contacts
- Editing multiple contacts at once

7.5.1 Sending E-Mails from within an address book

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

How to send an E-Mail from within an address book:

1. Select a contact or a distribution list from the sidebar.
2. Click on **Send mail** in the display area.
3. Fill in the details in order to Send a new E-Mail [46].

7.5.2 Inviting contacts to an appointment

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

How to invite contacts to an appointment:

1. Select a contact or a distribution list from the sidebar.
2. Click on **Invite to appointment** in the display area.
3. Complete the details for creating an appointment.

7.5.3 Editing contacts

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

How to edit a contact:

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

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

7.5.4 Moving contacts

You can move one contact or multiple contacts at once to another folder.

How to move a contact to another folder:

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

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

7.5.5 Copying contacts

You can copy one contact or multiple contacts at once to another folder.

How to copy a contact to another folder:

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

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

7.5.6 Deleting contacts

You can delete an individual contact or multiple contacts at once.

How to delete a contact:

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

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

Result: The contact is deleted.

7.5.7 Editing multiple contacts at once

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

- sending an E-Mail to multiple contacts
- inviting contacts to an appointment
- moving or copying contacts to another folder
- deleting contacts

How to apply a function to multiple contacts at once:

1. Click the **Select** icon ☰ below the sidebar. A checkbox is displayed next to each contact in the sidebar.
2. Check the boxes for at least two contacts.
3. Click on a function in the display area.

7.6 Contacts within Teams

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

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

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

  Share this folder with all or certain users.

  You can also share an existing folder with read or write permissions. Further information can be found in Permissions.
- If another user shared a contact folder with you, you can use those contacts. Further information can be found in Permissions.

8 Calendar

Learn how to use the *Calendar* application.

- the *Calendar* components
- display appointments
- create appointments
- answer appointment invitation
- manage appointments
- share calendars with other users
- use the *Calendar* settings

Use one of the following methods to open the *Calendar* application:

Click on **Calendar** in the menu bar.
Click on **Calendar** on the **Apps** page below *Your applications*.

8.1 The Calendar Components

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

Toolbar

Contains the following icons:

- **Add** icon. Creates a new appointment [73].

  Note: This function is only enabled if you opened a calendar for which you have the appropriate permissions to create objects.
- **View** icon. Selects one of the following views for the display area:
  - Day, Work week, Week, Month
  - List
- **Toggle Folder** icon. Opens or closes the Folder tree.
- **Toggle Search** icon. Opens an input field in order to search [106] for appointments with a certain subject.

Folder tree

Displays the calendar folders. Enables navigation within the folder structure [107]. In order to open the folder tree, click the **Toggle Folder** icon in the toolbar. The following functions are available:

- If clicking on a folder, appointments within that folder are displayed.
- Icons below the folders offer functions for Organizing data [105].
- The **Pin** icon defines whether the folder tree overlaps the sidebar or the display area or is displayed next to the sidebar or the display area.
- The **Close** icon closes the folder tree.

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

Displays the calendar view for the selected time range.

- The selected time range is displayed at the top left corner of the calendar sheet.
- The navigation bar above the calendar sheet allows selecting a time range.
- The *Show all* checkbox at the top right corner of the calendar sheet defines which appointments to display.
  - If enabled, all appointments from all your private calendars are displayed.
  - If disabled, only the appointments in the currently selected calendar are displayed.
- In the *Day*, *Work week* and *Week* views an area for creating [73] all day appointments is shown on top of the calendar sheet.
- In the *Day*, *Work week* and *Week* views the current time in the calendar sheet is highlighted with a red line.
- In the *Work week*, *Week* and *Month* views the current day in the calendar sheet is highlighted with a coloured background.
- In the *Month* view the selected month, calendar week, and the year are displayed to the right of the calendar sheet. A scrollbar on the right side allows selecting a different month.
- Depending on the confirmation status, the appointments are highlighted with different colours [72].

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

Sidebar in the *List* view

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

- If clicking on an appointment, its data is displayed in the display area.
- If clicking the **Select** icon below the list, a checkbox is displayed next to each appointment. You can select multiple appointments in order to edit them at once [77].
- The text below the list contains the names of the selected folder. If clicking on the name, the folder tree opens.
- If clicking the **Sort** icon below the list, a menu opens that helps you sort appointments. With the **Show all** checkbox you can define whether you only want to view the appointments in the currently selected calendar or all appointments from all your private calendars.

Display area in the *List* view

Shows the data of the appointment and the functions available:

- Date, the recurrence type (for recurring appointments), time and time zone
- Subject
- Appointment location, if entered
- Buttons: **Edit** [76], **Change status** [77], **Move** [77], **Delete** [77]
- Appointment description, if entered
- Names of the participants, if they exist. If clicking on a name, a pop-up opens. It consists of the following components:
  - The person's contact data
  - If you have exchanged E-Mails with this person, they are displayed below *Recent conversations*.
  - If you have appointments scheduled with this person, they are displayed below *Shared appointments*.

  If clicking on an appointment or an E-Mail, an additional pop-up opens.
- If the appointment has other participants, the buttons **Send E-Mail to all participants** [79]and **Save as distribution list** [79] are displayed.
- Details
  - availability
  - which folder
  - who created the appointment and when
  - who was the last person to modify the appointment

8.2 Displaying Appointments

You can choose between the following views:

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

In the calendar settings you can define a default view.

8.2.1 Displaying appointments in a calendar view

How to display appointments in a calendar view:

1. Click the **View** icon in the toolbar. Click on one of the following entries: **Day**, **Work week**, **Week**or **Month**.
2. Open a calendar folder in the folder tree.
3. Define the appointments to be displayed.
   To display all the appointments from all your private calendars, enable **Show all**.
   To only display the appointments in the currently selected calendar, disable **Show all**.
4. Click on an appointment in the calendar sheet. The calendar's data is displayed in the pop-up. You can do the following:
   Display a participant's details by clicking on the participant's name. An additional pop-up opens.
   Edit [76] the appointment.
   Delete [77] the appointment.

8.2.2 Displaying appointments in the list view

How to display an appointment in the list view:

1. Click the **View** icon in the toolbar. Click on **List**.
2. Open a calendar folder in the folder tree.
3. Define the appointments to be displayed.
   To view all appointments from all your private calendars, enable **Show all**.
   To only view the appointments of the currently selected calendar, disable **Show all**.
4. To quickly find a particular appointment, use the search function.
5. Click on an appointment in the sidebar. The appointment's data is displayed in the display area.
6. To display another appointment, use one of the following methods:
   Click on another appointment in the sidebar.
   Use the cursor keys to browse the list.

8.2.3 How are appointments displayed?

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

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

8.3 Creating Appointments

The following options exist:

- Creating new appointments

8.3.1 Creating new appointments

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

- Create an appointment by entering subject, time, and location.
- Use further functions: create recurrence, add other participants, set the availability or add attachments.

How to create a new appointment:

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

Tip: As an alternative, you can use one of the following methods:

Select one of the calendar views (*Day*, *Work week*, *Week*or *Month*). Double-click on a free area in the calendar sheet.

Select one of the calendar views *Day*, *Work week* or *Week*. To create an all day appointment, double-click on top of the calendar sheet.

Select one of the calendar views (*Day*, *Work week*, *Week*or *Month*). In the calendar sheet drag open an area ranging from the beginning to the end of the new appointment.

How to use additional functions when creating appointments:

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

1. To create a recurring appointment, activate **Repeat**. The current repetition parameters are displayed.

   To set the repetition parameters, click on the value. Examples can be found in the Calendar questions and answers.

   To hide the repetition parameters, click the **Close** icon. ✕. To show them again, click on **Edit**.
2. In **Display as** you can set the availability display. Examples can be found in the Calendar questions and answers.
3. If the subject is not to be shown to other users, activate **Private**.
4. To add other participants, enter the participants' E-Mail addresses in the input field below *Participants*. Click the icon +.

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

   Use the scrollbar to browse the list. Click on a suggestion.

   Use the cursor keys to select a suggestion. Press Enter.

   To remove a participant, click the icon X next to the name.

   In order to add multiple participants, you can enter the name of a distribution list [65].

   To inform all participants about the new appointment, enable *Notify all participants by E-mail.*.
5. To add an attachment to the appointment, click on **Select files** below *Attachments*. Select a file. Click on **Add**.

   To add additional attachments, repeat the steps.

   To remove an attachment, click the **Delete** icon X.

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

8.3.2 Resolving appointment conflicts

An appointment conflict happens if the following is true:

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

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

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

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

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

8.4 Answering Appointment Invitations

If a user adds you to the appointment recipients, you are informed about this appointment in the *Notification area*. You can accept, tentatively accept or refuse the appointment.

How to answer an appointment invitation:

1. Click the **Unread badge** icon in the menu bar 11. The *Notification area* is displayed.
2. Click on **Accept/Decline** below *Invitations*.
3. Enter a comment in the *Change confirmation status* window. Click on one of the buttons **Decline**, **Tentative**or **Accept**.

You can also change your appointment status at a later point in time.

8.5 Managing appointments

Some of the techniques for organizing appointments require having all ready set up your own calendar folders. Information about creating folders can be found in Folders (page 107).

The following options exist:

- Editing appointments
- Editing appointments with drag and drop
- Changing the appointment status
- Moving appointments to another folder
- Deleting appointments
- Editing multiple appointments at once

8.5.1 Editing appointments

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

How to edit an appointment:

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

1. Depending on the view selected, use one of the following methods:
   - Click on an appointment in the *Day*, *Work week*, *Week* or *Month* view. In the pop-up, click on **Edit**.
   - In the *List* view, select an appointment in the sidebar. Click on **Edit** in the display area.

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

8.5.2 Editing appointments with drag and drop

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

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

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

How to move an appointment to another day:

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

How to change an appointment's time:

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

How to change the start or end of an appointment:

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

8.5.3 Changing the appointment status

You can change your appointment status at a later point in time.

How to change your appointment status:

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

8.5.4 Moving appointments to another folder

You can move an individual appointment or multiple appointments at once to another folder.

How to move an appointment to another folder:

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

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

8.5.5 Deleting appointments

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

How to delete an appointment:

Warning: If you delete an appointment it is irrevocably lost.

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

Result: The appointment will be deleted.

8.5.6 Editing multiple appointments at once

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

- Moving appointments to another folder

How to execute a function for multiple appointments at once:

1. In the *List* view, click the **Select** icon below the sidebar. A checkbox is displayed next to each appointment in the sidebar.
2. Enable the checkboxes for at least two appointments.
3. Click on a function in the display area.

8.6 Team Appointments

The following options exist:

- Sharing appointments
- Sending an E-Mail to participants
- Creating a distribution list from the list of participants

8.6.1 Sharing appointments

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

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

  Create a new personal or public calendar folder.

  Share this folder with all users on your team. If other team members should be able to enter appointments, share this folder with write permissions.

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

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

  Make sure the *Notify all participants by E-mail* option is enabled.

8.6.2 Sending an E-Mail to participants

You can send an E-Mail to all appointment participants.

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

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

   In the views *Day*, *Work week*, *Week* or *Month*, click on an appointment. In the pop-up, click on **Send mail to all participants**.

   In the *List* view, select an appointment in the sidebar. Click on **Send mail to all participants** in the display area.
2. Complete the details for Sending the E-Mail [46].

8.6.3 Creating a distribution list from the list of participants

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

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

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

   In the views *Day*, *Work week*, *Week* or *Month*, click on an appointment. In the pop-up, click on **Save as distribution list**.

   In the *List* view, select an appointment from the sidebar. Click on **Save as distribution list** in the display area.
2. Complete the details for creating the distribution list [65].

8.7 Calendar Settings

How to use the calendar settings:

1. Click the **System menu** icon at the right side of the menu bar. Select **Settings** from the menu.
2. Click on **Calendar** in the sidebar.
3. Change the Settings [80].

The following settings are available.

- Interval in minutes
- Start of working time
- End of working time
- View
- Display refused appointments
- Default time for reminder
- E-Mail notification for new, changed or deleted
- E-Mail notification for appointment creator
- E-Mail notification for appointment participant

Interval in minutes

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

Start of working time

Defines the start of the working hours.

End of working time

Defines the end of the working hours.

View

Specifies the default appointment view.

Display refused appointments

Defines whether appointments that you refused are displayed.

Default time for reminder

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

E-Mail notification for new, changed or deleted

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

E-Mail notification for appointment creator

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

E-Mail notification for appointment participant

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

9 Files

Learn how to use the *Files* application.

- the *Files* components
- search and display files
- open files and show their contents
- view or play multimedia files
- create files
- organize files
- share files with other users
- use the *Files* settings

In order to launch the *Files* application, use one of the following options:

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

Click on **Files** below *Your applications* on the **Apps** page.

9.1 The Files Components

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

Toolbar

Contains the following icons:

- **Add** icon. Contains the following functions:
  - **Upload new file**. Creates a new file [87].
- **View** icon. Allows selecting one of the following views for the display area:
  - Icons
  - List
- **Toggle Folder** icon. Opens or closes the folder tree.
- **Toggle Search** icon. Opens an input field for searching [106] for files with a certain name.

Folder tree

Displays the folders. Allows navigation within the folder structure [107]. In order to open the folder tree, click the **Toggle Folder** icon in the toolbar. The following functions are available:

- If clicking on a folder, its files are displayed.
- The icons below the folders offer functions for Organizing data [105].
- The **Pin** icon defines whether the folder tree overlaps the sidebar or the display area or is displayed next to the sidebar or display area.
- The **Close** icon closes the folder tree.

Display area in the *Icons* view

Displays the following information:

- Navigation path to the selected folder. To open another folder, click on the path.
- If the folder contains images, audio or video files, functions for playing multimedia files [86] are displayed.
- An icon for each file in the selected folder and if available, a file preview.

If clicking on a file, its data are displayed in the Popup. It shows the same information as the display area in the *List* view.

Sidebar in the *List* view

Displays a list of files in the currently selected folder. The following functions are available:

- If clicking on a file, its data is displayed in the display area.
- If clicking the **Select** icon below the list, a checkbox is displayed next to each file. You can select multiple files to edit all of them at once [91].
- The text below the list contains the name of the selected folder. If clicking on the name, the folder tree opens.

Display area in the *List* view

Displays the file's data:

- Name, file name
- Buttons: **Open** [85], **Download** [85], **Delete** [90].

  If clicking on **More**, a menu opens showing the following functions: **Send as link** [88], **Send by E-Mail** [88], **Show link** [88], **Rename** [89], **Edit description** [89], **Move** [89]and **Copy** [89], **Add to portal** [90].

  Note: Some buttons are not displayed if you do not have the appropriate permissions.
- A file preview, if available
- File comments
- Buttons for uploading a new version.
- A version list if the file has several versions. The current version is listed on top. For each version the following information is displayed:
  - the version's file name
  - version comments, if available
  - name of the user who uploaded the version
  - date and time of the version's upload

9.2 Viewing Files

By default, the content of your personal files folder is displayed. The folder is named *My files*. You can choose one of the following views:

- the List view
- the Icon view

9.2.1 Displaying files in the list view

How to view a file in the list view:

1. Click the **View** icon in the toolbar. Click on **List**.
2. Open a folder in the folder tree.
3. In order to quickly find a certain file, use the search function.
4. Click on a file in the sidebar. The file data is shown in the display area. For some file types a preview is displayed.
5. To display another file, use one of the following methods:
   Click on another file in the sidebar.
   Use the cursor keys to browse the list.

9.2.2 Displaying files in the icon view

How to display a file in the icon view:

1. Click the **View** icon in the toolbar. Click on **Icons**.
2. Select a folder from the navigation path on top of the display area or open a folder in the folder tree.
3. In order to quickly find a particular file, use the search function.
4. Click a file's icon in the display area. The data is displayed in the pop-up. For some file types a preview is shown.

9.3 Opening Files and Displaying Contents

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

- display or download a file's content [85]
- display the contents of an Office document [85]
- play multimedia files [86]

9.3.1 Displaying a file's content

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

- Plain text files or images in common file formats can be displayed or downloaded in the browser.
- You can download files and open them with a suitable software.
- There are special functions available for Office documents [85] and multimedia files [86].

How to display a file's content:

1. Open a folder containing files, in the folder tree.
2. Depending on the view selected, use one of the following methods:
   Click on a file in the *Icons* view. Click on **Open** in the pop-up window.
   In the *List* view, select a file in the sidebar. Click on **Open** in the display area.
3. Depending on the file's content, the result varies:
   Plain text files and images in common file formats are directly displayed in the browser.
   Office documents are displayed page by page.
   For other files a system window opens that allows to download the file.

Tip: Learn how to download a certain file version by reading Section 9.5.10, “Working with versions”.

How to download a file:

1. Open a folder containing files, in the folder tree.
2. Depending on the view selected, use one of the following methods:
   Click on a file in the *Icons* view. Click on **Download** in the pop-up window.
   In the *List* view, select a file in the sidebar. Click on **Download** in the display area.
3. Complete the steps for downloading the file.

Tip: Learn how to download a certain file version by reading Section 9.5.10, “Working with versions”.

9.3.2 Displaying the contents of Office documents

You can display the contents of the following Office documents:

- Texts
- Tables
- Presentations
- PDF documents

How to display the contents of Office documents:

1. Open a folder containing Office documents, in the folder tree.
2. Depending on the view selected, use one of the following methods:
   Click on a document in the *Icons* view. Click on **Open** in the pop-up window.
   In the *List* view, select a document in the sidebar. Click on **Open** in the display area.
   The *Document Viewer* shows the content of the Office document.
3. To browse in documents with multiple pages, use the icons on top of the document.
4. To close the *Document Viewer* , click the **Close** icon on the right side of the Office toolbar.

9.3.3 Playing Multimedia Files

You can use the following multimedia functions:

- view images as a slideshow
- play audio files
- play video files

How to view images as a slideshow:

1. Click the **View** icon in the toolbar. Click on **Icons**.
2. Select a folder with images from the navigation path on top of the display area. As an alternative, open a folder with images, in the folder tree.
3. Click on **View Slideshow** in the display area. To view the slideshow in fullscreen mode click on **Fullscreen**.

How to play audio files:

1. Click the **View** icon in the toolbar. Click on **Icons**.
2. Select a folder with audio files from the navigation path on top of the display area. As an alternative, open a folder with audio files, in the folder tree.
3. Click on **Play audio files** in the display area. A player window opens. To play the audio files in the background, click on **Minimize**.

How to play video files:

1. Click the **View** icon in the toolbar. Click on **Icons**.
2. Select a folder with video files from the navigation path on top of the display area. As an alternative, open a folder with video files, in the folder tree.
3. Click on **Play video files** in the display area. A player window opens.

9.4 Creating Files

A file can consist of:

- a description
- one or more versions of a locally saved file
- comments

How to create a new file:

1. Open a folder in the folder tree.
   Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click the **Add** icon in the toolbar. Click on **Upload new file**.
3. Enter a description in the *Add new file* window.
4. In order to upload a locally saved file, click on **Browse**. Select a file.
5. You can enter additional information in the **Comments** field.
6. Click on **Save**.

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

9.5 Managing Files

Some of the techniques for managing files require having all ready set up your own folders. Information on creating folders can be found in Folders (page 107).

The following options exist:

- Sending files as a link
- Sending files as E-Mail attachments
- Showing the link to a file
- Editing file names
- Editing descriptions
- Moving files
- Copying files
- Adding files to the portal
- Deleting files
- Editing multiple files at one time
- Working with versions

9.5.1 Sending files as a link

You can send a link to a file as an E-Mail attachment to a user. You can send links to multiple files at once as E-Mail attachments. Please also read the hints in Section 9.6, “Files and Teams”.

How to send a link to a file as an E-Mail attachment:

1. Depending on the view selected, use one of the following methods:
   In the *Icons* view, click on a file. In the pop-up, click on **More**. In the menu, click on **Send as link**.
   In the *List* view, select a file in the sidebar. In the display area, click on **More**. In the menu click on **Send as link**.
2. In the *Compose new E-Mail* page, complete the details for sending the E-Mail [46].

9.5.2 Sending files as E-Mail attachments

You can send the current version as an E-Mail attachment. You can send the current versions of multiple files at one time as E-Mail attachments.

How to send the current version as an E-Mail attachment:

1. Depending on the view selected, use one of the following methods:
   In the *Icons* view, click on a file. In the pop-up, click on **Send by E-Mail**.
   In the *List* view, select a file in the sidebar. Click on **Send by E-Mail** in the display area.
2. Complete all data for sending the E-Mail [46] on the *Compose new E-Mail* page.

9.5.3 Showing the link to a file

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

How to show the link to a file:

Depending on the view selected, use one of the following methods:
In the *Icons* view, click on a file. In the popup, click on **Show link**.
In the *List* view, select a file in the sidebar. Click on **Show link** in the display area.

9.5.4 Editing file names

You can edit a file name.

How to edit the file name:

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

1. Depending on the selected view, use one of the following methods:
   In the *Icons* view, click on a file. In the pop-up, click on **More**. In the menu, click on **Rename**.
   In the *List* view, click on a file in the sidebar. Click on **More** in the display area. In the menu, click on **Rename**.
2. Edit the file name. Note the name extension.
3. Click on **Rename**.

9.5.5 Editing descriptions

You can edit a file's description.

How to edit a file's description:

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

1. Depending on the view selected, use one of the following methods:
   In the *Icons* view, click on a file. In the pop-up, click on **More**. In the menu, click on **Edit description**.
   In the *List* view, click on a file in the sidebar. In the display area, click on **More**. In the menu, click on **Edit description**.
2. Edit the description.
3. Click on **Save**.

9.5.6 Moving files

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

How to move a file:

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

1. Depending on the view selected, use one of the following methods:
   In the *Icons* view, click on a file. In the pop-up, click on **More**. In the menu, click on **Move**.
   In the *List* view, click on a file in the sidebar. In the display area, click on **More**. In the menu, click on **Move**.
2. Select a folder in the *Move* window. Click on **Move**.

9.5.7 Copying files

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

How to copy a file:

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

1. Depending on the selected view, use one of the following methods:
   In the *Icons* view, click on a file. In the pop-up, click on **More**. In the menu, click on **Copy**.
   In the *List* view, click on a file in the sidebar. In the display area, click on **More**. In the menu, click on **Copy**.
2. Select a folder in the *Copy* window. Click on **Copy**.

9.5.8 Adding files to the portal

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

How to add a file to the portal:

Depending on the view selected, use one of the follwing methods:
Click on a file in the *Icons* view. Click on **More** in the pop-up window. Click on **Add to portal** in the menu.
In the *List* view, select a file in the sidebar. Click on **More** in the display area. Click on **Add to portal** in the menu.

9.5.9 Deleting files

You can delete a single file or multiple files at once.

Warning: A deleted file can not be recovered.

How to delete a file:

1. Depending on the selected view, use one of the following methods:
   In the *Icons* view, click on a file. In the pop-up, click on **Delete**.
   In the *List* view, select a file in the sidebar. Click on **Delete** in the display area .
2. Confirm that you want to delete the file.

Result: The file will be deleted.

9.5.10 Working with versions

There are the following options for working with versions:

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

How to open or save the current version:

Depending on the selected view, use one of the following methods:
In the *Icons* view, click on a file. A pop-up opens. To open the version, click on **Open**. To save the version, click on **Download**.
In the *List* view, select a file in the sidebar. To open the version, click on **Open** in the display area. To save the version, click on **Download** in the display area.

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

How to upload a new version:

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

   In the *Icons* view, click on a file. In the pop-up, click on **Select file** below *Upload new version*. Select a file.

   In the *List* view, select a file in the sidebar. Click on **Select file** below *Upload new version* in the display area. Select a file.

2. Enter a version comment.
3. Click on **Upload**.

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

How to open or save a certain version:

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

   In the *Icons* view, click on a file. In the pop-up, click on a version's name below *Versions*. A menu opens.

   In the *List* view, select a file in the sidebar. Click on a version's name in the display area below *Versions*. A menu opens.

2. In order to open the version, click on the **Open** menu entry. In order to save the version, click on the **Download** menu entry.

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

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

   In the *Icons view*, click on a file. Click on a version's name in the pop-up below *Versions*. A menu opens.

   In the *List* view, select a file in the sidebar. Click on a version's file name in the display area below *Versions*. A menu opens.

2. Click on the **Make this the current version** menu entry .

How to delete a certain version:

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

   In the *Icons* view, click on a file. Click on a version's name in the pop-up below *Versions*. A menu opens.

   In the *List* view, select a file in the sidebar. Click on a version's file name in the display area below *Versions*. A menu opens.

2. Click on **Delete version** in the menu.

9.5.11 Editing multiple files at one time

You can execute the following functions for multiple files together:

- opening or saving the current versions
- sending the current versions as E-Mail attachments
- deleting files

How to execute a function for multiple files together:

1. In the *List* view, click the **Select** icon below the sidebar. A checkbox is displayed next to each file in the sidebar.
2. Check the boxes for at least two files.
3. Click on a function in the display area.

9.6 Files and Teams

You can share your files with internal. Depending on the requirements, different methods exist.

- In the *Public InfoStore* you can find file folders shared by other users.
- To share files with internal users, proceed as follows:

  Create a new personal or public folder to which you can copy or move the required files.

  Share this folder with all users or only with certain users.

  You can also share an existing folder with read or write permissions. Additional information can be found in Permissions.
- If another user shared a file folder with you, you can use the included files. Further information can be found in Permissions.

9.7 Files Settings

How to use the files settings:

1. Click the **System menu** icon at the right side of the menu bar. Click on **Settings** in the menu.
2. Click on **Files** in the sidebar.
3. Change the settings [94].

The following settings are available.

- Default view
- Audio enabled
- Video enabled

Default view

Defines the default view for the files.

Audio enabled

Enables or disables the audio player.

Video enabled

Enables or disables the video player.

10 Tasks

Learn how to work with the *Tasks* application.

- the *Tasks* components
- view tasks
- create tasks
- answer task invitation
- organize tasks
- share tasks with other users
- use the *Tasks* settings

Use one of the following methods to launch the *Tasks* application:

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

Click on **Tasks** below *Your applications* on the **Apps** page.

10.1 Tasks Components

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

Toolbar

Contains the following icons:

- **Add** icon. Creates a new task [98].
- **Toggle Folder** icon. Opens or closes the folder tree.
- **Toggle Search** icon. Opens an input field to search [106] for tasks with a particular subject.

Folder tree

Displays the tasks folders. Allows to navigate within the folder structure [107]. To open the folder tree, click the **Toggle Folder** icon in the toolbar. The following functions are available:

- If clicking on a folder, its tasks are displayed.
- The icons below the folders offer functions for Organizing data [105].
- The **Pin** icon defines whether the folder tree overlaps the sidebar or the display area or is displayed next to the sidebar or the display area.
- The **Close** icon closes the folder tree.

Sidebar

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

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

Display area

Displays the task's data and the functions available:

- Subject
- Due date, if entered
- Status and progress
- Importance icon
- If the task has attachments, the names of the attachments are displayed.
- Buttons: **Edit** [100], **Move** [100], **Delete**, [101], **Done** [100], **Change due date** [100]
- Task's description, if available
- Task's start date, if available

10.2 Displaying Tasks

How to display a task:

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

10.3 Creating Tasks

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

- Create a task by entering the subject and the due date
- Use further functions: adding participants and resources, adding attachments, adding details

How to create a new task:

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

How to use further functions when creating a task:

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

1. In order to add a further participant, enter the participant's E-Mail address in the input field below *Participants*. Click the icon.
   Tip: While entering the E-Mail addresses, matching suggestions are displayed. In order to accept a suggestion, use one of the following methods:
   Use the scrollbar to browse the list. Click on a suggestion.
   Use the cursor keys to select a suggestion. Press Enter.
   In order to remove a participant, click the icon next to the name.
   In order to add multiple participants, you can enter the name of a distribution list [65].
2. In order to add attachments to the task, click on **Attachments**. Click on **Browse**. Select one or multiple files.
   In order to remove an attachment, click the **Delete** icon .
   In order to hide the input fields, click on **Attachments**. The attachments added will remain.
   Tip: You can also add an attachment by dragging a document from a file browser or from the desktop and dropping it in the task window.
3. In order to add details like billing information, click on **Details**. Enter the data required.

10.4 Answering Tasks Invitations

If a user adds you to a task as participant, you are informed about this task in the *Info area*. You can accept, temporarily accept or refuse your participation in the task.

How to answer a task invitation:

1. Click the **New objects** icon in the menu bar 11. The *Info area* is displayed.
2. Under *Invitations* select an invitation status for the new task.
3. Click on **Change status**.

10.5 Managing Tasks

Some of the techniques for organizing tasks require having set up own tasks folders. Information about creating folders can be found in Folders (page 107).

The following options exist:

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

10.5.1 Editing tasks

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

How to edit a task:

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

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

10.5.2 Marking tasks as done

You can mark a task or multiple tasks at once as done.

How to mark a task as done:

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

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

10.5.3 Changing a task's due date

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

How to change a task's due date:

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

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

10.5.4 Moving tasks

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

How to move a task:

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

1. Select a task in the sidebar
2. Click on **Move** in the display area .
3. Select a folder in the *Move* window. Click on *OK*.

10.5.5 Deleting tasks

You can delete one task or multiple tasks together.

How to delete a task:

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

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

Result: The task is deleted.

10.5.6 Editing multiple tasks at once

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

- Moving tasks to another folder
- Marking tasks as done
- Deleting tasks

How to execute a function for multiple tasks at once:

1. Click the **Select** icon A checkbox is displayed in the sidebar next to each task.
2. Enable the checkboxes for at least 2 tasks.
3. Click on a function in the display area.

10.6 Tasks within a Team

You have the following options:

- Sharing [102] tasks with other users
- Delegating [102] tasks to other users

10.6.1 Sharing tasks

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

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

  Create a new personal or public tasks folder.

  Share this folder with all users in your team. To grant other team members the permission to create appointments, share this folder with write permissions.

  Further information can be found in Permissions.
- To invite external partners to a task, do the following:

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

10.6.2 Delegating tasks

You can delegate a task to an internal user when newly creating the taks. To do so enter the name of the internal user as participant.

10.7 Tasks Settings

How to use the tasks settings:

1. Click the **System menu** icon at the right side of the menu bar. Select **Settings** from the menu.
2. Click on **Tasks** in the sidebar .
3. Change the settings [103].

The following settings are available.

- Interval of the reminder in minutes
- E-Mail notification for Accept/Declined
- E-Mail notification for task creator
- E-Mail notification for task participant

Interval of the reminder in minutes

Specifies the preset time interval for the reminder of the task's due date.

E-Mail notification for Accept/Declined

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

E-Mail notification for task creator

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

E-Mail notification for task participant

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

11 Organizing Data

Learn how to organize your data.

- Find objects by using the search function.
- Work more efficiently with folder management.
- Organize your team work by granting permissions.

11.1 Searching for Objects

Use the search function to find objects like E-Mails or contacts with the help of a search term.

How to search for objects:

1. In the folder tree, open the folder that you want to browse.
2. Click the **Toggle Search** icon in the toolbar.
3. Enter a search term. Press **Enter** or click the **Search** icon next to the input field. The sidebar displays the objects matching the search term.

   Depending on the app, respective checkboxes are displayed next to the input field. Use those checkboxes to find objects by activating the boxes with matching properties.
4. Use one of the following methods to reset the search result:

   Click the **Toggle Search** icon (in the toolbar) again.

   Click on **Cancel search** below the sidebar.

11.2 Folders

Folders help you

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

Learn more about folders and how to use them:

- the folder types [107]
- navigate within the folder structure [107]
- create [108], rename [108], anddelete [108] folders.

11.2.1 Folder types

The following folder types exist in the folder tree:

- Personal folders
  - Personal folders contain your E-Mails, contacts, appointments, tasks, and files. Other users can not view your personal folders, unless you share them with other users.
  - Your personal folders for contacts, appointments, tasks, and files are located in *Private* in the folder tree.
  - Your personal file folder is located in *My files*.
- Public folders
  - Public folders contain contacts, appointments, and documents that are of common interest to all users. Each user can create public folders and share them with other users.
  - Public folders are located in the folder tree in *Public*. Here you will find the global address book with the contact data of all users.
  - The public file folders are located in *Public files*.
- Shared folders
  - Shared folders have been shared with you by other users with read or write permission.
  - Shared folders are located in the folder tree in *Shared*.
  - Shared file folders are located in *Shared files*.

11.2.2 Navigating within the folder structure

The following functions are available:

- opening or closing the folder tree
- opening or selecting a folder in the folder tree

How to open the folder tree:

1. Click the **Toggle Folder** icon in the toolbar.
2. In order to define whether the folder tree overlaps the sidebar or the display area or is displayed next to the sidebar or the display area, click the **Pin** icon below the folder tree.

How to close the folder tree:

Use one of the following methods:

- Click the **Close** icon below the folder tree.
- Click the **Toggle Folder** icon in the toolbar.

How to open a certain folder:

1. If the folder tree is closed, click the **Toggle Folder** icon in the toolbar.

   In order to define whether the folder tree overlaps the sidebar or the display area or is displayed next to the sidebar or the display area, click the **Pin** icon below the folder tree.
2. To view a folder's subfolders, click on the arrow next to the folder name.
3. To open a folder, click on it.

Result: The folder's content is displayed

11.2.3 Creating folders

You can create any number of subfolders in a personal folder. To create subfolders in a shared or public folder, you need to have the required permissions [110].

How to create a new folder:

1. In the folder tree, select the folder in which you want to create a new subfolder. If you do not select a folder, the new subfolder will be created in your personal root folder.

   Note: Select a folder for which you have the appropriate permissions to create subfolders.
2. Click the **Add** icon below the folder tree. Click on **Add subfolder**.
3. Enter a name in the *Add new subfolder* window. Click on **Add folder**.

11.2.4 Renaming folders

You can rename subfolders in your personal folders. For other folders you need the appropriate permissions [110].

How to rename a folder:

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

1. In the folder tree select the folder that you want to rename.
2. Click the **Edit** icon below the folder tree. Click on **Rename**.
3. Edit the name or enter a new name. Click on **Rename**.

11.2.5 Moving folders

You can move subfolders from your personal folders. For other folders you need to have the appropriate permissions [110].

How to move a folder:

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

1. In the folder tree, select the folder that you want to move.
2. Click the **Edit** icon below the folder tree. Click on **Move**.
3. Select a folder in the *Move folder* window. Click on *Move*.

11.2.6 Deleting folders

You can delete subfolders in your personal folders. For other folders you need to have the required permissions [110].

How to delete a folder:

Warning: If you delete a folder, all subfolders and objects in this folder will also be deleted. Deleted subfolders and objects can not be restored.
Note: To delete a folder, you need to have administrative rights for this folder.

1. In the folder tree, select the folder that you want to delete.
2. Click the **Edit** icon below the folder tree. Click on **Delete**.
3. Confirm that you want to delete the folder.

Result: The folder and its objects are permanently deleted.

11.3 Permissions

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

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

A description of permissions can be found in 11.3.1: Which permissions can be granted? (page 110).
A listing of preset permissions for specific folders can be found in in 11.3.2: Permissions for folders that already exist (page 111) and in 11.3.3: Permissions for new folders (page 111).
Information on granting permissions can be found in 11.3.4: Sharing folders (page 112).

11.3.1 Which permissions can be granted?

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

- Owner
- Administrator
- Author
- Guest

Owner

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

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

Administrator

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

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

Author

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

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

Guest

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

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

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

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

11.3.2 Permissions for folders that already exist

You have the following permissions for folders that already exist:

- You are the owner of your personal folders.
- Each user is a guest of the folder *Public Folders*.
- Each user is a guest of the *Global Address book* folder.
- Each user is a guest of the *InfoStore* and *UserStore* folder.
- Each user is a guest of the *Public InfoStore* folder.

11.3.3 Permissions for new folders

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

- in a personal folder [111]
- in a public folder [111]
- in a shared folder [111]

If you create a new folder in a personal folder:

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

If you create a new folder in the **Public folders** folder or in the **InfoStore/Public InfoStore** folder:

- You are the owner.
- Other users will get no rights. You have to set the permissions for the new folder. If you then create new subfolders in this folder, the permissions for this folder are inherited by the new subfolders. Information on how to grant permissions can be found in 11.3.4: Sharing folders (page 112).

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

- The user who shared the folder, is the owner.
- You as well as other users will get the same rights as for the parent folder.

11.3.4 Sharing folders

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

- grant rights for a folder,
- change the rights for a folder,
- grant rights by applying a user role, and
- delete the rights for a folder.

Note: Consider the following restrictions:

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

You can not share your personal *Inbox* folder. In order to grant other users access to your E-Mail messages, share an E-Mail folder that is located below your *Inbox* folder. Other users have to subscribe to this E-Mail folder. See 6.6.2: Subscribing to E-Mail folders (page 54).

You have the exclusive rights for your personal calendar, contacts, and tasks folders. You can not grant administrator rights for these folders to other users. Examples for practical settings can be found in the data organisation and team work questions.

How to grant permissions for a folder:

1. Select a folder in the folder tree.

   Note: You need to have administrative rights for this folder.
2. Click the **Edit** icon below the folder tree. Click on **Permissions**. The *Folder permissions* window shows the current permissions for this folder.
3. At the bottom, enter a user's name. Click the icon. The user gets the preset permissions.
4. Click on a user's permission to change it. Example settings can be found in questions about data organisation and team work.
5. If required, repeat these steps to grant additional permissions.
6. Click on **Save**.

How to change the folder permissions:

1. Select a folder in the folder tree.

   Note: You need to have administrative rights for this folder.
2. Click on the **Edit** icon below the folder tree. Click on **Permissions**. The *Folder permissions* window shows the current permissions for this folder.
3. Click on a permission to change it. Example settings can be found in Questions about data organization and team work.

   Note: You cannot change the administrative rights of a personal folder.
4. Click on **Save**.

How to grant permissions by applying a user role:

1. Select a folder in the folder tree.

   Note: You need to have administrative rights for this folder.
2. Click on the **Edit** icon below the folder tree. Click on **Permissions**. The *Folder permissions* window shows the current permissions for this folder.
3. Click on **Apply role** next to a user name. Select a User role [110] from the menu.
4. Click on **Save**.

How to remove a user's folder permissions:

1. Select a folder in the folder tree.
   Note: You need to have administrative rights for this folder.
2. Click on the **Edit** icon below the folder tree. Click on **Permissions**.
3. In order to remove a user's permissions, click the icon next to the user's name.
4. Click on **Save**.

12 Best Practices

General questions

Where can I find my personal data and settings?

You can customize the following data and settings:

- Your password for accessing the groupware can be found in the groupware settings.
- Learn how to change your personal data.
- Learn how to customize the basic settings.
- Learn how to set up additional E-Mail accounts [56].

How can I change my password?

In order to change your password, click on **My password** in the *User data* square in the *Portal* app. Learn more from this instruction.

Why can particular buttons or input fields not be found?

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

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

How am I notified about new E-Mails or appointment invitations?

If there are new E-Mails or appointment notifications, the *Unread Badge* icon 11 to the right side of the menu bar shows the number of new objects. Click the icon to open the *Notification Area*. It contains information about the new objects. From there you can also directly activate functions, e.g. read the new E-Mail or confirm the new appointment. More information can be found in The User Interface.

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

In the *Portal* app you can read current messages from your social networks or from news pages or view photos of specific web pages by adding squares with news widgets.

Questions about E-Mails and contacts

How can I send an E-Mail to multiple addresses at once?

To send an E-Mail to multiple recipients at once, you can choose from the following options:

- Enter all recipients in the input fields **To...**, **Copy to...** or **Blind copy to...**. Use the auto-complete function to more easily enter the addresses. This FAQ list provides an explanation of the differences between the input fields.
- If you regularly send E-Mails to the same group of people, create a distribution list in the *Address book* app and add the E-mail addresses to the distribution list. Information can be found in Creating Distribution Lists [65].

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

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

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

I regularly send E-Mails with identical or similar content. How can I speed up this process?

Make use of the ability to save E-Mails as drafts. Information can be found in Working with E-Mail drafts [50].

Can I e.g. access E-Mails sent to my Google Mail account?

For many E-Mail service providers you can set up external E-Mail accounts, e.g. for Google Mail. You only need your account data for the respective provider. As soon as you set up the external E-Mail account you have access to the E-Mails from within the folder tree. Information can be found in External E-Mail Accounts [56].

Questions about tasks, calendars, and appointments

When should I use a task and when should I use an appointment?

Whether it is best to use an appointment or a task can be determined based on the following criteria:

- An appointment takes place at a defined point in time. If you need to execute an action at a defined point in time, create an appointment for this action.
- A task has a due date and sometimes a priority. If you are flexible regarding the time schedule of an action and only have to respect the due date, enter a task for this action.

How can I create a task from an E-Mail?

Use the *Reminder* function in the display area of the *E-Mail* app. More information can be found in Enabling an E-Mail reminder [51].

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

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

How do I use the availability function, e.g. Free, Busy, Absent etc?

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

How do I use the calendar recurrence settings?

Example 1: An appointment should take place each second day. It should start on 07-01-2013. The appointment should take place five times.

Starts on 07-01-2013

Daily

The appointment is repeated every 2 days.

The series ends after 5 appointments.

Example 2: An appointment should take place each Tuesday and Friday. It should start on 08-01-2013.

Starts on 08-01-2013

Weekly

The appointment is repeated every week on Tuesday, Friday.

The series never ends.

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

Starts on 09-01-2013

Weekly

The appointment is repeated every 2 weeks on Wednesday.

The series ends on 27-03-2013.

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

Starts on 04-02-2013

Monthly

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

The series ends after 12 appointments.

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

Starts on 29-11-2013

Yearly

The appointment is repeated every last Friday in November.

The series never ends.

Questions about data organization and team work

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

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

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

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

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

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

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

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

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

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

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

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