Groupware
User Guide

Groupware: User Guide

Publication date Monday, February 12, 2024 Version 7.10.6
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1   About this Documentation

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

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1.1   Target Groups, Contents

This documentation is addressed to the end user.

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

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

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

1.2   Terminology

Account

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

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

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

Related topics: Managing Accounts (p. 260)

Allowlist

An allowlist is a list of domain names or email addresses that you trust.

Related topics: use allowlists (p. 271)

App

An application is a groupware component that provides certain functions. Example: With the Email application you can send, receive and organize emails.

Distribution list

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

- send an email to multiple contacts
- add internal or external participants to an appointment or a task
- grant permissions to multiple users or guests by inviting them to a share

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

Related topics: Adding Distribution Lists (p. 118)

Domain

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

Related topics: use allowlists (p. 271)

Elements

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

Related topics: General Description of the User Interface (p. 22)

Email thread

An email thread is an email conversation The email thread includes the original email and all replies. All emails in an email thread have the same subject. The current email corresponds to the last reply.

Related topics: The Email list (p. 61)

External email account

Your groupware email account You will automatically get this account. You can not delete this account.

Related topics: Editing the primary email account (p. 261)

External email account

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

- It serves a specific purpose like communicating with customers. Typical examples are support@example.com, info@example.com.
- It can be used jointly by multiple users, to read, reply or send emails.

The administrator defines the users who are allowed to use a functional email account.

- Users can neither edit nor delete a functional email account.

Related topics: Disabling or enabling functional email accounts (p. 262)

External participant	A person that is not an internal groupware user but that participates in an appointment or task.
Folders	Folders contain app specific objects. In some apps, folders can also include subfolders. Some folders are preset, other folders can be set up by the user. Folder examples: E-Mail folders, address books, calendars, task folders
	Related topics: Managing Data with Folders (p. 238)
Global address book	Contains the contact data for all internal users. The users can edit their own personal data in the global address book.
Group	A group consists of a group name and a number of internal users. Groups can be used as follows:
	• add to an appointment or task
	• grant permissions by inviting to a share
	Depending on the configuration, specific groups are predefined. Depending on the groupware configuration, users can get the permission to create additional groups.
	Related topics: Managing Groups (p. 181)
Groupware	The software described in this documentation.
Guest	A person who received an invitation to a share by another user or has been added to an appointment or task as external participant. Each guest user belongs to the *Guests* group. This group can not be changed or deleted.
Objects	Objects are groupware data that are created and organized by the user. Examples: emails, contacts, appointments, tasks, documents, files, folders, address books, calendars
Participant	A user invited to an appointment or task.
Resource	Resources are rooms or devices that can be added to an appointment. A resource consists of a resource name, an email address and an optional description.
	You can only add resources that are not used for other appointments.
	Depending on the configuration, specific resources are predefined. Depending on the configuration, users can get the permission to create additional resources.
	Related topics: Managing Resources (p. 182)
Session	A session is a connection between a client, e.g. a browser, an email client or a smartphone app and a server, e.g. the groupware server. A session starts with the login and ends with the logout.
	Related topics: Displaying or Signing Out from Active Clients (p. 272)
Tabs	Tabs provide an easy and simple way of keeping the *Inbox* folder neat. With tabs, incoming emails are saved separated by sender in the *Inbox* folder. Depending on the configuration, specific tabs are predefined. You can set additional tabs according to your needs.

	Tabs can only be used in the *Inbox* folder. If you need further storage options, use the folder view to create email folders.
	Related topics: Working with tabs (p. 79)
User	A person working with the groupware. Each user has a username and a password. Each groupware user belongs to the *default group*. Those users are also called internal users.
User interface	This refers to the groupware user interface. The user interface consists of individual elements.
	Related topics: General Description of the User Interface (p. 22)

2   First Steps

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

- Groupware Definition (p. 18)
- Signing in, Signing out (p. 20)
- Changing the Password (p. 21)
- General Description of the User Interface (p. 22)

You can also have a look at those topics:

- Keyboard Input (p. 32)
- Usage on Mobile Devices (p. 36)

2.1   Groupware Definition

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

Portal
Your information center for scheduled appointments, new emails or messages from messaging platforms.

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

Learn more: *Portal* (p. 49)

Email
Send, receive and organize your emails.

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

Learn more: *Email* (p. 57)

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 address books to organize your contacts. Co-operate with your team by sharing selected address books.
- Use the contacts from your social networks. This enables you to use the groupware as a central collection point for your contacts.
- Work with external partners by sending contact data in vCard format or sharing address books.

Learn more: *Address Book* (p. 101)

Calendar
Keep an overview of your private and business appointments.

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

Learn more: *Calendar* (p. 135)

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.
- Use the recurring tasks functions to keep track of recurring activities.

Learn more: *Tasks* (p. 185)

Drive
Use the file store to centrally manage information or to share information with others.
- Save any files, notes or Internet links. Give your team read or write access to selected document folders.
- Create and edit simple text files.
- Send individual files as email attachments or links.
- Provide information to external partners by sharing document folders.

Learn more: *Drive* (p. 207)

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 view helps to manage folders and permissions.
- Use personal folders for sorting your emails, contacts, appointments, tasks, and files.
- Support your team by sharing certain folders with read or write access.
- Benefit from the information of others by using objects in public or shared folders for your work.

Learn more: *Data Organization and Shares* (p. 237)

2.2   Signing in, Signing out

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

How to sign in to the server:

1. Open a web browser.
2. Enter the server address in the address bar. The login page will be displayed.
3. Enter your username and your password. Note that they are case-sensitive.
4. To save your credentials locally, enable **Stay signed in**.

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

5. Click on **Sign in**.

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

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

How to sign out:

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

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

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

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

2.3   Changing the Password

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

Depending on the configuration, you have the following options for changing the password:

▪ use the basic settings
▪ use the *User data* widget

How to change the password in the basic settings:

1. Click the **Settings** icon ⊡ on the right side of the menu bar. Click on **Settings**.

2. Click on **Basic settings** in the sidebar.
Click on **Change password** at the bottom of the display area.

3. Change your password.

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

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

2. If the *User data* widget is not displayed, click on **Add widget** on the upper right side. Click on **User data**.
Click on **My password** in the *User data* widget.

3. Change your password.

User interface:

Related topics:

2.4 General Description of the User Interface

Learn which basic elements are part of the user interface and where they are located.

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

The user interface includes the following elements:

- The menu bar (p. 23)
- App Launcher (p. 24)
- The search bar (p. 25)
- The folder view (p. 27)
- The toolbar (p. 26)
- The display area (p. 28)
- The pop-up (p. 29)
- The notification area (p. 30)
- The editing window (p. 31)

2.4.1   The menu bar

Note: The following is a schematic representation.

Content

- **All Applications** icon ⊞. Opens a menu with icons for launching an app.
- Depending on the configuration: Quick launch icons for launching frequently used apps.
  The context menu allows to define the apps that should be displayed as quick launch icons.
- **Notifications** icon ▣. The icon is displayed when receiving a new notification. The icon notifies you of the number of new notifications e.g., new appointment invitations. If clicking the icon, the notification area opens.
- Depending on the configuration: **Call history** icon ▣. Opens the call history that shows all calls or missed calls. If clicking on an entry, the window for calling this contact will be opened.
- **Refresh** icon ▣. Reloads objects from the server. Irrespective of this function, objects are refreshed in regular intervals.
- **Help** icon ▣. Opens a menu with further functions:
  - **Help**. Opens a context related help page.
    Tip: Some windows also include the help icon. If clicking on it, the respective help for the window context is displayed.
  - Giving feedback about the groupware
  - Depending on the configuration, there are several guided tours that help you get started with the groupware.
  - **About**. Shows information about the groupware.
- **Settings** icon ▣. Opens a menu with further functions:
  - Customize settings.
  - Depending on the configuration: **Connect your Device**. Launches a wizard for setting up local apps with which you can access your groupware data.
- **My account** icon. Opens a menu with further functions:
  - **Download personal data**. Opens a window where you can adjust your personal contact data in the global address book.
  - **Sign out**. Signs you out from the groupware.

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

Related topics:

2.4.2   App Launcher

Note: The following is a schematic representation.
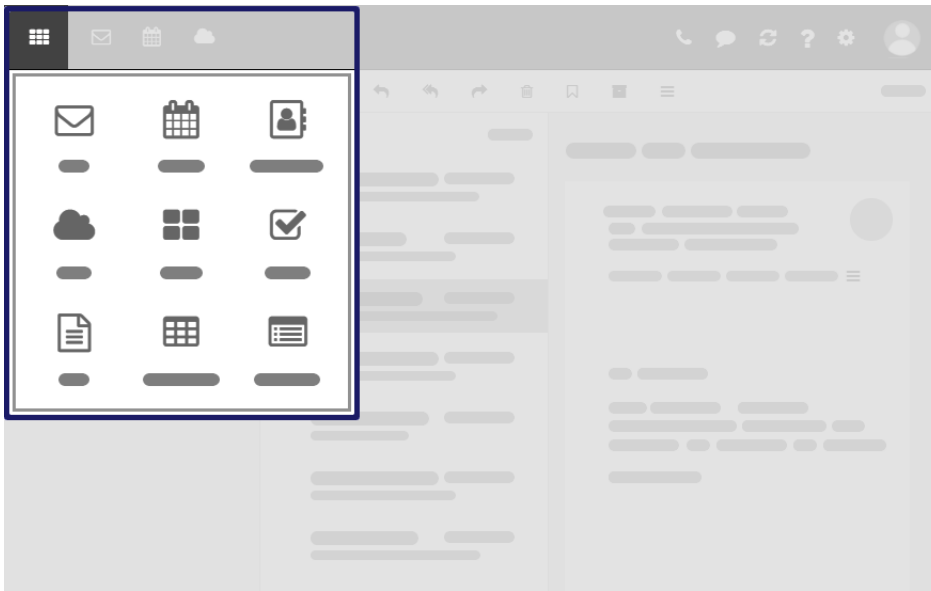
In order to show the app launcher, click the **All Applications** icon ⊞.

Content

- Contains squares for launching the apps. Depending on the configuration, the number of squares can vary.

Related topics:

The menu bar (p. 23)

2.4.3 The search bar

Note: The search bar contents are different for each app. The following is a schematic representation.
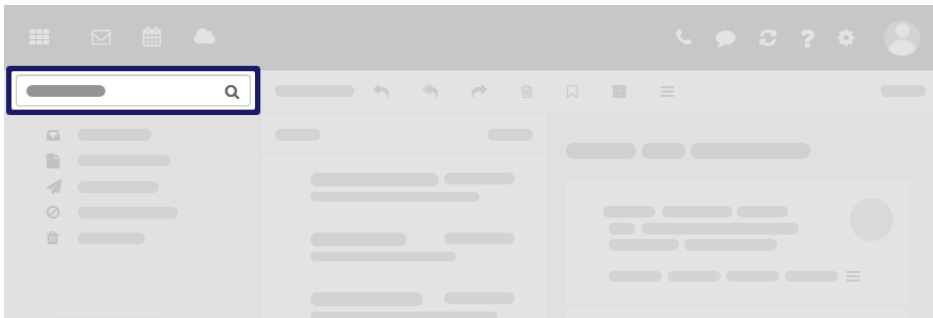
In order to display the search bar, click on **View** in the toolbar. Enable **Folder view**.

Content

- Input field for the search term
  As soon as clicking into the input field, additional functions are displayed in the search bar.
- **Cancel search** icon ⊗. Finishes the search.
- Functions for selecting the folder to be searched
- **Options** icon ▼ . Opens a menu with app specific parameters for controlling the search. Depending on the app, additional drop-downs for controlling the search are available.
- **Online help** icon ❓. Displays a context-sensitive help.

The search result is displayed in the display area.

Related topics:

2.4.4   The toolbar

Note: The toolbar contents are different for each app. The following is a schematic representation.
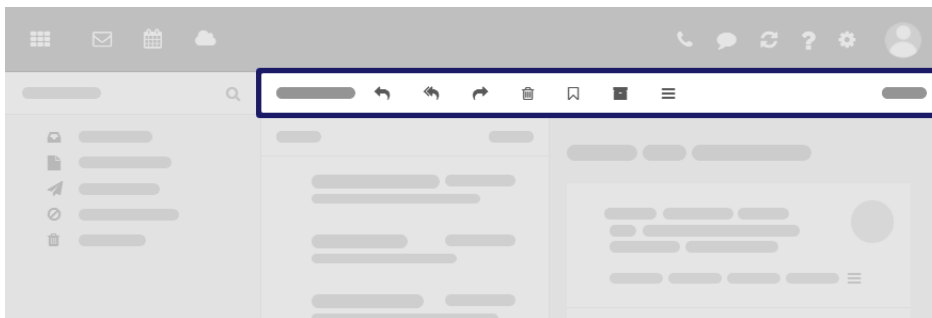
Content

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

Related topics:

2.4.5   The folder view

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

To open or close the folder view, use one of the following methods:
- Click on **View** in the toolbar. Enable or disable **Folder view**.
- Click the **Open folder view** ≫ or **Close folder view** icon ≪.

To adjust the folder view width, hover over the line between the folder view and the display area.

Content

- The app specific folders
  Folders are called differently in the following apps:
  - A folder is called address book in the Address Book app.
  - A folder is called calendar in the Calendar app.
- Depending on the application or the configuration, sections for personal, public and shared folders
- The **Folder-specific actions** icon ▤ next to the selected folder. It contains functions for organizing folders. You can also use the **context menu**.
- Depending on the app, further functions might be available.

Related topics:

2.4.6   The display area

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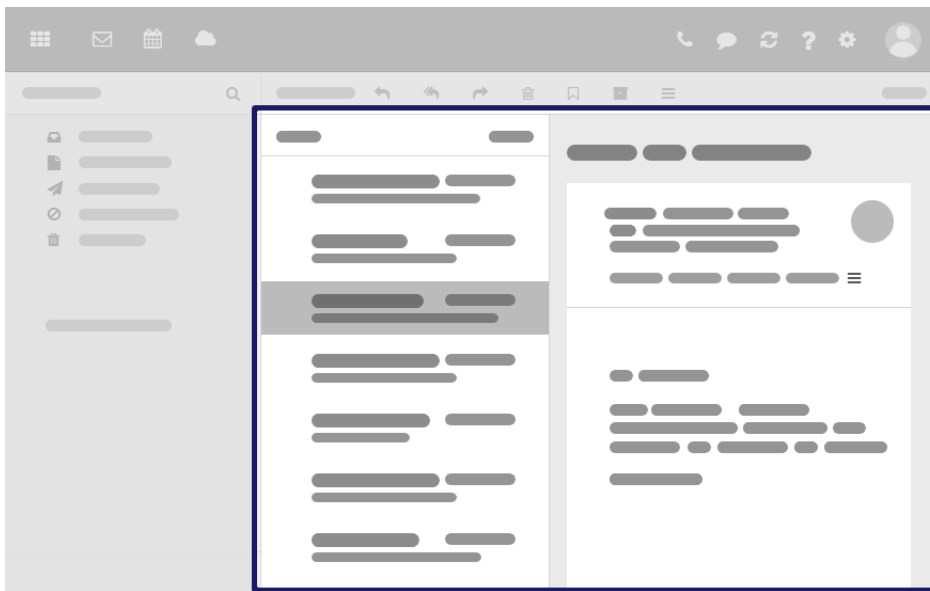
Content

- A list of app specific objects: emails, contacts, appointments, tasks, files
  To adjust the list width, hover over the line between the list and the detail view.
- On top of the list, control elements for selecting or sorting objects are displayed.
- The details of the object selected in the list, are displayed in a detail view.
  If double-clicking on an object in the list, the content will be displayed in a window.
- To select multiple objects, enable the **Checkboxes** option in the **View** drop-down in the toolbar.
  You can also use your system's multi selection functions.

You can change the view in the display area by clicking on **View** in the toolbar.

Related topics:

2.4.7   The pop-up

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

Shows an object's details. The following actions open the pop-up:
- clicking on an email, an appointment or a task in the app Portal
- clicking on a sender or recipient in an email's detail view
- clicking on an appointment's or a task's participant
- clicking on an appointment in a calendar view

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

Related topics:

2.4.8   The notification area

Note: The following is a schematic representation.

Displays notifications about the following events:
- new appointment invitations
- reminder for a scheduled appointment or task

The following actions open the notification area:
- Clicking on the **Notification** icon ⬛ in the menu bar. The icon is displayed when receiving a new notifi-cation.
- Depending on the settings, the notification area automatically opens if there is a new notification.

Content

- Notifications about new invitations and upcoming events
- Control elements for editing notifications: accept, decline, remind again, delete

Related topics:

2.4.9   The editing window

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

The following actions open the editing window:

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

Content

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

Properties

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

Related topics:

2.5   Keyboard Input

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

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

2.5.1   Keys and key combinations

The following key combinations are defined. Depending on the system, further key combinations might be preset, whereas those key combinations are not officially supported.

Arrow down	Opens a menu.
Arrow left or right	Moves the cursor within input fields. Moves the cursor within the calendar views or the date picker. Opens or closes a folder in the folder view. Selects a function in the toolbar.
Arrow up or down	Selects an app in the app launcher. Selects elements in the folder view, the sidebar or the display area. Moves the cursor within the calendar views or the date picker. Opens or closes a folder in the folder view. Selects a menu entry.
[a]	Moves the emails that you selected in the list to the **Archive** folder.
[Ctrl]+[a]	Selects all objects in the list.
[Ctrl]+[F6] on Windows and Linux systems, [F6] on MacOS systems	Switches between menu bar, folder view, sidebar and display area.
[Del], [Backspace]	Deletes the selected object.
[End]	Moves the cursor to the end of the line in input fields.
[Enter]	Executes the selected function.
[Esc]	Closes a pop-up. Cancels a window.
[Home]	Moves the cursor to the beginning of the line in input fields.
[Page up], [page down]	Browses the folder view or the sidebar. Browses the calendar view or the date picker, depending on the time range displayed.
[Space]	Enables or disables the selected checkbox.
[Tab], [Shift]+[Tab]	Selects a function, an input field or a checkbox.

2.5.2   Interacting with the user interface via keyboard

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

- To switch between the menu bar, the folder view, the sidebar, and the display area, use [Ctrl]+[F6] on Windows and Linux systems, [F6] on MacOS systems.
- To select an app in the app launcher, use [Down arrow] or [Up Arrow].
- To select a function, an input field or a checkbox, use the [Tab] key. The selected element will be highlighted.
  With [Shift]+[Tab] you can select elements in reverse order.
- To execute the function selected, press [Enter].
- To enable or disable a selected checkbox, press the [Space bar].
- To toggle the checkboxes, use the cursor keys.
- To move the cursor within input fields, use the following keys: cursor keys, [Home], [End].
- To browse the folder view or the sidebar, use the following keys: [Page up], [page down]
- To open or close a folder in the folder view, use the left or right arrow key.
- To select elements in the folder view, the toolbar, the sidebar or the display area, use the cursor keys.
- To close a pop-up or cancel a window, press [Esc].
- To delete the selected emails, folders or files press [Del] or [Backspace].
- To move selected emails to the **Archive** folder, press [a].
- To select all objects in a list, press [ctrl]+[a]

2.5.3 Use cases

Instructions that show how to use the keyboard control:
- How to use the keyboard to send a new email
- How to use the keyboard to reply to an email

How to use the keyboard to send a new email:

1. If the email app is not launched, do the following:
   - Repeatedly press [Ctrl]+[F6] or [F6] on Mac OS systems until the **My account** icon is highlighted on the right side of the menu bar.
   - Use [Left arrow] to navigate to the **All Applications** icon ⊞. Press [Enter] to open the App Launcher.
   - Use [Down arrow] to navigate to the **Email** icon. Press [Enter].
     The email app will be launched.

2. Repeatedly press [Tab] until the **Compose** button is highlighted in the toolbar. Press [Enter]. The *Compose* window opens. The input field **To:** is enabled.

3. Enter the recipient's email address. Press [Enter].

4. Repeatedly press [Tab] until the **Subject** input field is highlighted. Enter the subject. Press [Enter]. The input field for the email text is enabled.

5. Enter the email text.

6. In order to send the email, press [Tab]. The **Send** button is highlighted. Press [Enter]. The email is sent.

7. To add attachments, repeatedly press [Tab] or [Shift]+[Tab] until the **Attachment** button is highlighted. Press [Enter]. Select **Add local file**.

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

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

How to use the keyboard to reply to an email:

1. If the email app is not launched, do the following:
   - Repeatedly press [Ctrl]+[F6] or [F6] on Mac OS systems until the **My account** icon is highlighted on the right side of the menu bar.
   - Use [Left arrow] to navigate to the **All Applications** icon ⊞. Press [Enter] to open the App Launcher.
   - Use [Down arrow] to navigate to the **Email** icon. Press [Enter].
     The email app will be launched.

2. Repeatedly press [Tab] or [Ctrl]+[F6] or [F6] on Mac OS systems until a folder is highlighted in the folder view. Use the cursor keys to select the desired folder. To view or hide subfolders, use [Right arrow] or [Left arrow].

3. If the wanted folder is highlighted, press [Enter]. The first email in the folder is highlighted in the list.

4. Use the cursor keys to select the desired email.

5. To reply to the email, repeatedly press [Tab] or [Shift]+[Tab] , until the **Reply** function or the **Reply all** function is highlighted. Press [Enter] to activate the function.

   Repeatedly press [Shift]+[Tab] until the **Compose** button is highlighted in the toolbar. Use the cursor keys to navigate to browse to the **Reply to sender** icon ↰ or to the **Reply to all recipients** icon ↰. Press [Enter].

## 2.6	Usage on Mobile Devices

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

- The user interface automatically adjusts to the smaller screen.
- The user interface follows the standards for mobile devices.
- Some less frequently used functions are not available on a mobile device.

How to launch the groupware on a mobile device:

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

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

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

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

3   Basic Settings

Learn how to customize the groupware's design and behavior to fit your personal needs:

3.1   Customizing the Basic Settings

In the basic settings, you can set the language, the regional settings and other personal settings.

How to customize the basic settings:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. Click on **Basic settings** in the sidebar.

The following settings are available as default:

Language

Defines the user interface language.

More regional settings

Opens a window for customizing regional settings. The preset regional settings depend on the selected language.

Timezone

Defines the time zone to which all time-bound entries refer.
Also see Displaying multiple time zones (p. 150)

Design

Defines the color scheme for the user interface.

Refresh interval

Defines the interval for retrieving new objects from the server.

Default application after sign in

Defines the application that is displayed after login.

Automatic sign out

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

Open notification area automatically

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

Show desktop notifications

Defines whether you will receive a desktop notification for new emails. Depending on the browser settings, the **Manage browser permissions now** button is displayed. If clicking on the button, a browser specific dialog for allowing notifications opens.

Configure quick launchers

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

My contact data

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

Change password

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

Manage deputies

To define deputies for your email conversation or your appointment scheduling, click on this button.

Related topics:

3.2   Changing the Regional Settings

In the regional settings, you set the data formatting and the basic calendar settings:

- time format
- date format
- number format
- first weekday of a calendar week
- first calendar week of a year

The following options exist:

- select a regional setting
- customize the regional setting

How to change the regional settings:

1. Click the **Settings** icon ⬚ on the right side of the menu bar. Click on **Settings**.

2. Click on **Basic settings** in the sidebar.
    Click on **More regional settings** in the display area. The *Regional settings* window opens.

3. Change the settings.
    To undo the change, click on **Reset**.

Related topics:

Customizing the Basic Settings (p. 38)
Changing Personal Contact Data (p. 41)

3.3   Changing Personal Contact Data

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

How to change your personal contact data:

1. Click the **My account** icon on the right side of the menu bar. Click on **Edit personal data**.
   You can also click on **My contact data** in the basic settings or in the address book settings.

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

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

How to create a contact picture:

1. Click the **My account** icon on the right side of the menu bar. Click on **Edit personal data**.
   You can also click on **My contact data** in the basic settings or in the address book settings.

2. Click on the empty contact picture. The *Edit image* window opens.
   - You can upload an existing image or take a new picture with the device camera.
   - You can adjust the image section with the zoom and by moving or rotating the photo.

3. Click on **Save**. The photo will be inserted.
   In order to edit the photo, click on it.

User interface:

Related topics:

3.4   Working with Notifications

You can configure the groupware to receive notifications about specific events.

You will be notified in the notification area for the following events:
- new appointment invitations
- appointment reminders
- due tasks
- tasks with a due date in the past

If you have enabled desktop notifications and the groupware is in the background, you will be informed about the following events:
- incoming emails

How to use the notification area:

1. As soon as a notification is being received, **Notifications** icon ⬛ shows the number of new notifications. To open the notification area, click the icon.

   If the notification area is to be opened automatically upon receipt of new notifications, proceed as follows:

   a. Click the **Settings** icon ⬕ on the right side of the menu bar. Click on **Settings**.

   b. Click on **Basic settings** in the sidebar.

      Enable **Automatic opening of notification area** in the display area.

2. Show or hide notifications:
   - To close the notification area, click the **Close** icon ✖. The notifications will be hidden.
   - In order to show the notifications again, click the **Notifications** icon ⬛ in the menu bar.
   - To show a notification's details, click on the notification title.
   - To receive the notification again later, click on **Notify me again later**. The notification area will be closed.

3. Edit notifications:
   - To display appointment invitation suggestions in the calendar, click on **Open in calendar**.
   - To accept or decline an invitation, click on the respective button.
   - To receive a specific reminder again, select a value in **Remind me again**. Click on **OK**. The notification area will be closed.
   - To mark overdue tasks as done, click on the respective button.

4. Delete reminders:
   - To delete a reminder, hover over the reminder. Click the **Delete** icon ✖ next to the reminder.
   - If there is more than one reminder: To delete all reminders, click on **Remove all reminders** at the bottom.

How to enable desktop notifications:

1. Click the **Settings** icon ⬕ on the right side of the menu bar. Click on **Settings**.

2. Click on **Basic settings** in the sidebar.

3. Enable **Show desktop notifications** in the notification area.

   Depending on the browser settings, the **Manage browser permissions now** button is displayed. Click the button. You are asked by the browser whether the receipt of notifications should be allowed. Grant this permission.

   Note: Depending on the browser, you might have to allow the receipt of notifications in the browser settings for the setting above to take effect. Information can be found in the browser help pages.

User interface:

The notification area (p. 30)

Related topics:

Customizing the Basic Settings (p. 38)
Settings for receiving emails (p. 98)

3.5   Manually Installing Local Apps

You can manually install local Drive apps for MS Windows, macOS, iOS or Android. The local Drive apps synchronize your Drive app data with your computer or mobile device.

Note: Depending on the configuration, those functions might not be available. In this case you can use a wizard to set up the apps.

How to install local Drive apps for computers or mobile devices:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Downloads**.
    Click the respective icon in the display area. Follow the instructions on installing the apps.

Related topics:

Using a Wizard to Set Up Local Apps (p. 45)
Customizing the Basic Settings (p. 38)

3.6   Using a Wizard to Set Up Local Apps

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

- Installing and configuring apps and clients on devices such as PCs, tablets and smartphones. The supported devices are: Windows, Apple and Android.
- Installing an email client on Windows systems. The client makes your emails, appointments, tasks and contacts locally available.
- Installing the local Drive app for desktop and mobile devices. This app is downloaded and installed from respective the app store for the device. The local Drive apps synchronize your Drive app data with your computer or mobile device.
- Depending on the device, the configuration might also be possible by email or SMS. Advanced users can display the configuration data for a manual configuration.

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

How to use the wizard:

1. Click the **Settings** icon ▣ on the right side of the menu bar. Click on **Connect your device**. The wizard will be launched.

2. Select your system and the required devices. Follow the instructions.

User interface:

The menu bar (p. 23)

Related topics:

Manually Installing Local Apps (p. 44)
Customizing the Basic Settings (p. 38)

3.7 Seting up and Configuring the Zoom Integration

The following options exist:

- Set up the Zoom integration
  Prior to being able to have Zoom meetings with other contacts, you have to set up the Zoom integration.
  To do so, you have to grant the groupware access to a Zoom account.
- Configure the Zoom integration
  You can configure the Zoom integration according to your needs.

How to set up the Zoom integration:

1. If you call a contact via Zoom in the Email, Address Book or Calendar app before having set up the Zoom integration, a window for registering a Zoom account opens. In this case, proceed with step **4**.

2. Click the **Settings** icon ⚙ on the right side of the menu bar. Click on **Settings**.
   In the sidebar, click on **Zoom Integration**.

3. Click on **Add Zoom account** in the display area. if this button will not be displayed, the Zoom integration has been done already.
   A window for registering a Zoom account opens.

4. Use one of the following methods:
   - Below **Sign in**, use the login method that you learned from your administrator or hoster.
   - To create an own Zoom account, click on **Register for free**. Follow the instructions.
   The data of the linked zoom account will be displayed.
   In order to cancel the link, click the **Remove account** icon 🗑 next to the account.

How to configure the Zoom integration:

1. Click the **Settings** icon ⊡ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Zoom Integration**.

The following settings are available:

Appointments
With those options, you can define the behavior if you select **Zoom Meeting** in the **Conference** drop-down when creating appointments.

▪ **Always add a random meeting password**
Defines whether the conference will be secured by an automatically created password.

▪ **Automatically copy link to location**
Defines whether the link for the Zoom meeting participation will be copied to the **Location** field.

▪ **Copy dial-in information to description**
Defines whether the link for the Zoom meeting participation will be copied to the **Location** field.

Incoming calls
With those options, you can define the behavior for incoming Zoom calls if the groupware is in the background.

▪ **Show desktop notifications**
Defines whether you will receive a desktop notification for an incoming Zoom call.

▪ **Play ringtone on incoming call**
Defines whether a notification sound will be played for incoming Zoom calls.

Dial-in numbers
If you at least have a Zoom Pro account, Zoom offers dial-in numbers per country. To define the countries to be displayed in in appointment invitations, click on **Open Zoom profile**.

Related topics:

3.8   Setting the Presence Status

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

How to set the current presence status:

1. Click the **My account** icon on the right side of the menu bar.

2. Select a presence status below **Availability**. You have the following options:
    - **Online**. You are signed in and can be contacted.
    - **Absent**. You are currently absent and can not be contacted.
    - **Busy**. You do not want to be disturbed, e.g. if you are in a meeting.
    - **Invisible**. You are not signed in.

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

Related topics:

Calling the Sender or Another Recipient (p. 76)
call contacts (p. 122)
Calling Appointment Participants (p. 167)
Scheduling audio/video conferences (p. 156)

Customizing the Basic Settings (p. 38)
Seting up and Configuring the Zoom Integration (p. 46)

4   Portal

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

How to start the Portal app:

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

Topics:

4.1   The Portal Components

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

- Signed in as (p. 51)
- Customize this page button (p. 51)
- Add widget button (p. 51)
- Appointments widget (p. 51)
- Inbox widget (p. 51)
- Tasks widget (p. 51)
- Recently changed files widget (p. 51)
- User data widget (p. 51)
- Quota widget (p. 52)
- News widgets (p. 52)
- Widgets with news from your social networks (p. 52)
- Widgets with information about Drive apps (p. 52)

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

4.1.1   Signed in as

Displays the username that you used for signing in.

4.1.2   Customize this page button

If clicking on this button, a page will be displayed that allows you to customize the Portal.

Related topics:

4.1.3   Add widget button

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

Related topics:

4.1.4   Appointments widget

Displays your current appointments. You can do the following:
- If clicking on an appointment, a pop-up opens. The pop-up shows the appointment data.
- To edit the appointment, click on the respective button in the pop-up.
- If clicking on a participant, an additional pop-up opens.

4.1.5   Inbox widget

Shows new emails. You can do the following:
- If clicking on an email, a pop-up opens. The pop-up displays the email's contents.
- To delete, reply to or forward the email, click on the respective button in the pop-up.

4.1.6   Tasks widget

Shows unfinished tasks. You can do the following:
- If clicking on a task, a pop-up opens. The pop-up shows the task data.
- To edit the task, click on the respective button in the pop-up.

4.1.7   Recently changed files widget

Displays new or changed files.

4.1.8   User data widget

Includes links for the following functions:
- Changing your personal contact data
- Changing your password

Related topics:

4.1.9   Quota widget

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

4.1.10   News widgets

Display current messages from different message sources:
- Messages from RSS feeds
- Photos from web pages like Flickr or Tumblr

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

4.1.11   Widgets with news from your social networks

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

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

4.1.12   Widgets with information about Drive apps

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

4.2   Customizing the Portal

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

Note: Depending on the configuration, some widgets might not be changeable.

4.2.1   Changing the widgets' order

You can define the order of the widgets.

How to change the order of the widgets:

1. Drag a widget to another position.

2. Drop the widget in the new position.

Related topics:

4.2.2   Removing Portal widgets

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

How to remove a widget:

Click the **Close** icon ✖ in the widget.

Related topics:

4.2.3   Adding Portal widgets

You can extend the existing widgets by adding new ones.

How to add new widgets:

1. Use one of the following methods:
    - Click the **Settings** icon ▦ on the right side of the menu bar. Click on **Settings**. Click on **Portal** in the sidebar. Click on **Add widget**. Select an entry.
    - Click on **Add widget** on the upper right side of the Portal app. Select an entry.

2. Some widgets require additional data. Enter the required values.

User interface:

Related topics:

4.2.4   Adding a Portal widget for social networks

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

How to add a widget for accessing social networks:

1. Click on **Add widget** on the upper right side of the Portal app. Select one of the entries. The widget will be added.

2. To enable the access, add your social network account by clicking on the respective button in the widget. You can change or delete the account in the account settings.

Related topics:

Changing the widgets' order (p. 54)
Removing Portal widgets (p. 54)
Adding Portal widgets (p. 54)
Creating a Xing account (p. 55)
Portal Settings (p. 56)
Viewing, editing, deleting accounts (p. 262)

4.2.5   Creating a Xing account

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

How to create a Xing account by using your groupware data:

1. Click on **Add widget** on the upper right side of the Portal app. Select **Xing**. The widget will be added.

2. Click on **Create a Xing account using the data stored here** in the widget.

3. Check the suggested data for creating the Xing account. In order to create the account, click on **Create**.

Related topics:

Changing the widgets' order (p. 54)
Removing Portal widgets (p. 54)
Adding Portal widgets (p. 54)
Adding a Portal widget for social networks (p. 55)
Portal Settings (p. 56)
Viewing, editing, deleting accounts (p. 262)

4.3   Portal Settings

How to use the Portal settings:

1. Click the **Settings** icon ✦ on the right side of the menu bar. Click on **Settings**.

2. Click on **Portal** in the sidebar.

3. Change the settings.

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

The following settings are available:

Add widget

Opens a menu for adding widgets.

Functions for editing widgets

▪ **Move icon** ═
Changes the widget order.

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

▪ **Color**
Defines the color used for displaying a widget's name.

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

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

Reduce to widget summary

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

Related topics:

5   Email

Learn how to read, send and organize your emails in the Email app.

How to start the Email app:

Click the **All Applications** icon ⊞ in the menu bar. Click on **Email** in the App Launcher.

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

Topics:

5.1   The Email Components

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

5.1.1   The Email toolbar

Contains functions for sending, editing and organizing emails.

Content

- **Compose**. Creates a new email.
- Icons for **replying to** and **forwarding** the selected email: ↩ ↩ ↪
- **Delete** icon 🗑. Deletes the emails selected by you.
- **Set category** icon ▷. Opens a menu allowing you to move an email to a category. This icon is only available if the inbox tabs bar is displayed.
- Icons for flagging emails.
  - **Set color** icon ⬠. Opens a menu, allowing you to assign a colored label to the email.
  - **Flag** icon ☆. Flags the email.
  Note: Depending on the configuration, not all options for flagging might be available.
- **Archive** icon ▤. Archives the emails selected by you.
- **More actions** icon ☰. Opens a menu with further functions.
- **View**. Opens a menu with checkboxes for controlling the view.
  - Defining the layout of the list and detail view: **Vertically**, **Compact**, **Horizontally**
  - **List**. Shows the list of emails. To display the detail view click on an email. Above the detail view a navigation bar will be displayed.
  - **Use categories**. Opens or closes the categories bar.
  - **Configure**. Opens the window for configuring the categories bar.
  - **Folder view**. Opens or closes the folder view.
  - **Checkboxes**. Displays checkboxes in the list, for marking objects.
  - **Text preview**. Shows a preview of the email content for each email in the list.
  - **Contact pictures**. Next to each email in the list, a contact picture of the sender will be displayed, provided the sender saved one in the address book.
  - **Date and time**. Shows the exact date and time when the email was received.
  - **Message size**. Shows the email size.
  - **Vacation notice**. Opens the *Vacation notice* window.
  - **All attachments**. Shows all email attachments that you have sent or received, in the Drive app.

General description of the user interface:

Related topics:

5.1.2   The Email folder view

Displays the email folders.

In order to display the folder view, click on **View** in the toolbar. Enable **Folder view**.

Content

- **Inbox**. Per default, all incoming emails go to this folder.
- **Unread**. This folder shows all unread messages.
- **Drafts**. Contains the emails saved as draft.
- **Sent objects**. Contains the email sent by you.
- **Trash**. Contains the email deleted by you.
- **Archive**. Contains the emails archived by you.
- **Email**. Contains the email folders created by you.
- **View all attachments**. Shows all email attachments that you have sent or received, in the Drive app.
- **Add mail account**. Opens a window for adding additional email accounts.

Depending on the configuration, further folders might be available:

- Shared email folders you subscribed to.
- Folders from functional email accounts that have been assigned to you by the administrator.

General description of the user interface:

Related topics:

5.1.3   The Email tabs bar

Shows predefined tabs for the emails in the **Inbox** folder. This allows to assign incoming emails to certain tabs sorted by senders.

Notes:

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

Related topics:

5.1.4   The Email display area

Contains the email list and an email's detail view.

In order to select a layout, click on **View** in the toolbar.

General description of the user interface:

Related topics:

5.1.5   The Email list

Displays a list of the emails in the current folder.

Content

- The following details are displayed for each email: Sender, subject, date of receipt. Unread E-Mails are marked with the **Unread** icon ●.
- The **View** menu in the toolbar enables you to display additional information: text preview, contact pictures, exact dates, message size
- A tooltip on a sender's name shows the sender's email address.
- If available, additional information is shown: attachment icons, colored label, flag, number of emails in conversation, priority.
- Encrypted emails are marked with the Encrypted icon 🔒.
- If a vacation notice is active, a notification is displayed above the list.
  If you close the notification, the vacation notice remains active.

Related topics:

5.1.6   The Email detail view

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

In order to display the detail view, click on **View** in the toolbar. Enable one of the following settings: **Vertically**, **Compact**, **Horizontally**

Content

- **Subject**
  If emails are sorted by conversations, the **Open/close all messages** icon ⌃ will be displayed next to a conversation's subject. If clicking on a free area between the sender and the date of receipt, the email opens or closes.

- **Read** icon ○. Changes the status from Read to Unread and vice versa.

- The sender's name or email address, the recipients' names.
  If clicking on a name, a pop-up opens. It displays information about the contact.

- Depending on the configuration, an icon is displayed next to the sender of a suspicious email. To display a message text, hover over the warning icon.
  A highlighted message text will be displayed below the function bar.

- Date and time of the receipt.

- Icons for flagging emails:

  - **Flag** icon ☆. Flags the email.

  - **Set color** icon ⌖. Opens a menu, allowing you to assign a colored label to the email.
    Note: Depending on the configuration, not all options for flagging might be available.

- A picture of the sender, if available.

- Frequently used functions: **Reply**, **Reply all**, **Forward**, **Delete**

- **More actions** icon ☰. If clicking on it, a menu with further functions for sending or organizing emails will be opened.

- If the email contains attachments, further elements are displayed:

  - **Attachment** icon ✎. If clicking on it, the attachments will be displayed as preview or list.
    If clicking the **Toggle preview** icon ▦ or ☰ the attachments will be shown as preview or as list.

  - Buttons that are used to apply a function to all email attachments at once.

- If selecting an email with an attachment as link in the **Sent items** folder, information about the attachment will be displayed at the top of the email text.

- Email text. Quotes from previous emails are marked at the beginning of the line.

Related topics:

5.1.7   The Email pop-up

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

Content

- Buttons for frequently used functions
  - If the contact is not yet saved in an address book, **Add to address book** will be displayed. If clicking on the button, the window for creating a new contact opens.
  - **Send email**. Opens the window for sending a new email to the contact.
  - **Invite**. Opens the window for creating an appointment with this contact.
- **More actions** icon ≡. If clicking the icon, a menu with frequently used functions for organizing contacts is opened.
- The contact's **Halo View**.

General description of the user interface:

Related topics:

5.1.8   The Email editing window

This window is used when creating or editing an email.

In order to open the window, do one of the following:
- Click on **Compose** in the toolbar.
- Select an email. Click an icon for replying or forwarding, in the toolbar.
- Select an email draft. Click on **Edit draft** or on **Edit copy** in the toolbar.

Content
- Addresses
  - **From**. Shows your sender address. If clicking on it, a menu with several functions opens:
    - Select another sender address
    - **Show names**. Defines whether the real name is displayed.
    - **Edit names**. Opens the window for editing the real name.
  - **CC**, **BCC** button. Opens the **CC** or **BCC** input field.
  - **To** input field. While entering the recipients, matching suggestions will be displayed. To accept a suggestion, click on it.
    If clicking on **To**, **CC**, **BCC** or one of the **Select contacts** icons ▣, a window for selecting contacts from an address book opens.
- Email content
  - **Subject** input field. Enter your email's subject in this field.
  - If the email has attachments, the attachments will be displayed as preview or list.
  - Input field for the email text.
    To format the text or to add images, click the **Options** icon ☰ in the button bar. Enable **HTML**. Enable the **Show toolbar** icon **A** in the button bar.
- Button bar
  - **Send**. Sends the email to the recipients entered.
  - An icon for showing or hiding the formatting options.
  - **Add local file** icon ✎. Adds local files.
  - **Add from Drive** icon ☁. Adds files that are saved in the Drive app.
  - depending on the configuration: **Enable encryption** icon 🔓. Encrypts the email. A function bar will be displayed above the email text. If clicking on **Options**, a menu with encryption options opens:
  - **Options** icon ☰. Opens a menu with further functions:
    - add signature to email text, edit signature
    - set priority, add vcard, request read receipt
    - define the email's text format: plain text, HTML
    - save the email as draft and close the editing window

General description of the user interface:

Related topics:

5.2   Viewing Emails

Learn how to select a specific email in a folder and display it in different ways in order to read it.

How to display an email:

1. Open an email folder in the folder view.

    When having selected the **Inbox** folder and if you are using email tabs, you can select a tab.

    To display the number of emails in a folder, hover over the folder name.

2. Click an email in the list. The content of the email will be displayed in the detail view.

    ▪   If the **Conversations** option is enabled in the **Sort** drop-down, all emails of a conversation will be displayed as thread.

        To open or close an email that is part of a conversation, click on a free area between the sender and the date of receipt.

        To open or close all emails in the conversation, click the **Open/close all messages** icon ⌃ on the upper right side of the detail view.

    ▪   If the email includes a quote from a previous email, you can display the quote by clicking the **Show quoted text** icon ⋯.

Options:

▪   To sort the email list, click on **Sort by** above the list.
    The sorting setting will be applied to the selected email folder. You can use different settings for the single folders.

▪   To combine all emails of a conversation in a single list entry, enable the **Conversations** checkbox in **Sort**.

▪   In order to select a layout, click on **View** in the toolbar.

▪   You can open the email in a window by double-clicking on the email in the list.

▪   When having selected **List** from the **View** drop-down, a list of all emails in the folder will be shown in the display area. If clicking on an email, the email's detail view will be displayed.

Tip: In the email settings, you can define whether a notification sound is to be played for incoming emails.

User interface:

Related topics:

5.3   Viewing or Saving Email Attachments

The file names of email attachments are displayed in the detail view. Depending on the configuration, the following functions are available:

- display attachments as preview or as a list
- display an attachment in the Viewer
- download attachments
- save attachments in Drive
- edit an attached document, start an attached presentation
- view all attachments from sent or received emails in the Drive app

How to use the email attachment functions:

1. Select an email with one or multiple attachments.

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

   To toggle the view, click the **Toggle preview** icon ⊞ or ☰.

2. To apply a function to all attachments, click on a button next to the **Attachment** icon ✎.

3. In order to apply a function to a specific attachment, enable the list view. Click on an attachment.

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

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

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

How to view all your emails' attachments in the Drive app:

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

1. Use one of the following methods:
   - Click on **View** in the toolbar. Click on **All attachments**.
   - Click on **View all attachments** in the folder view.

   The Drive app opens. The **My attachments** folder shows all attachments of all emails that have been sent or received by you.

2. You can use the Drive functions.

User interface:

   The Email detail view (p. 62)

Related topics:

   Viewing Emails (p. 65)

5.4   Sending Emails

Learn how to send an email and about the functions available for customizing the email content:

- Sending a new email (p. 68)
- select a sender address (p. 69)
- add attachments (p. 70)
- Sending attachments as link (p. 71)
- Using signatures (p. 72)
- Replying to emails (p. 73)
- Forwarding emails (p. 73)
- Automatically forwarding emails (p. 74)
- Sending an email to appointment participants (p. 74)
- Sending a vacation notice automatically (p. 75)

User interface:

Related topics:

5.4.1   Sending a new email

How to send a new email:

1. Click on **Compose** in the toolbar.

2. Enter the recipients' email addresses in the **To** field.
   - While entering the recipients, matching suggestions will be displayed. To accept a suggestion, click on it.
   - To select contacts from an address book, click the **Select contact** icon ▣ on the right side of the input field.

3. To send a copy to other recipients, click on **CC** or **BCC** on the upper right side.
   - If the recipients are to see who gets a copy of the email, enter the recipients in the **CC** field.
   - If the recipients are not to see who gets a copy of the email, enter the recipients in the **BCC** field.

4. Enter a subject. Enter the email text.

5. Click on **Send**.

Options:

- If you do not want to send the email from your primary email account but from an external or a functional email account, select the account in the folder view.
  Then, click on **Compose**.
- With drag and drop you can move the recipients between the fields **To**, **CC** and **BCC**.
- In the email settings, you can determine that each outgoing email will also be sent as blind copy to a specific email address.
- To format the email text or to enter images, use the formatting bar below the text.
  - If the formatting bar is not displayed, click the **Options** icon ≡ in the button bar. Enable **HTML**. Enable the **Show toolbar** icon **A** in the button bar.
    You can define default values for the font style, size and color in the email settings.
  - To enter images at the current cursor position, drag one or several images from a file browser or from the desktop to the email text input field.
    To remove an image, use the context menu.
- You can use further options by clicking the **Options** icon ≡ in the button bar:
  - attach your signature
  - set the priority
  - attach your vCard
  - request a read receipt

User interface:

Subordinated actions:

Related topics:

5.4.2   select a sender address

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

How to select your sender address:

1. Click on the sender address next to **From:** in the email editing window. A menu opens.

2. Select an email address.

   Note: Depending on the configuration, you might not be able to use email addresses from external email accounts.

3. You can define the name to be displayed with your email addresses. To do so, proceed as follows:

   a. Click on **Edit name**. The *Edit real names* window opens. The window displays the names that are preset in the account settings.

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

   In order to display the sender addresses without names, disable **Show names**.

Superordinated action:

Related topics:

5.4.3   add attachments

How to add attachments to an email in the email editing window:

1. Select the files to be sent as attachment.

    ▪ To send a local file as attachment, click the **Attachments** icon ✎ in the button bar.
       You can also add an attachment by dragging one or several files from a file browser or from the desktop to the email window.

    ▪ Depending on the configuration, you can send the current version of a file from the Drive app as attachment. To do so, click the **Add from Drive** icon ☁ in the button bar.

2. You can remove an attachment if required. To do so hover over an attachment. Click the **Remove attachment** icon 🗑.

Note: An email attachment can consume more than 25% of storage space than the locally saved file.

Options:

▪ Depending on the configuration, attached images can be minimized if they exceed a specified number of pixels or a specified file size. To do so, select an entry next to **Image size** on the bottom right side of the attachments
Note: Images can only be minimized directly after having been uploaded. If you open an email draft or re-load the email editing window, attached images can no longer be minimized.

▪ Depending on the configuration, attachments will not be sent when having reached a certain size limit. In this case, the attachment will be saved in the **Email attachments** folder in the Drive app. The email includes a link to the attachment.

Superordinated action:

Sending a new email (p. 68)

Related topics:

Sending attachments as link (p. 71)

5.4.4   Sending attachments as link

This function allows to send large attachments by email. This is how it works:

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

How to send attachments as link in the email editing window:

1. Select the files to be sent as attachment.
   - To send a local file as attachment, click the **Attachments** icon ✎ in the button bar. Select at least one file.
   You can also add an attachment by dragging one or several files from a file browser or from the desktop to the email window.
   - To use a current file version from the Drive app as attachment, click the **Add from Drive** icon ☁.

2. You can remove an attachment if required. To do so hover over an attachment. Click the **Remove attachment** icon 🗑.

3. Click on **Use Drive Mail** . The **Options** button will be displayed.
   Click on **Options**. The *Drive Mail options* window opens.
   - To set the expiration date for the public link, click on an entry below **Expiration**.
   If you select an expiration date, you can let the attachment be deleted after the expiration date. To do so, enable **delete if expired**.
   Note: Depending on the configuration, those functions are optional or mandatory.
   - To protect the public link with the attachments with a password, enable **Use password**. Enter a password. To view the password while entering it, click the icon on the right side in the input field.
   - To receive notifications about certain actions, enable one or several entries below **Email notifications**.
   Note: Depending on the configuration, this function might not be available.

Notes:

- Depending on the configuration, there might be a maximum file size for attachments that can be sent as link.
- In the **Sent objects** folder, the email will be marked with the icon ☁. When viewing the email, the following information are displayed at the top of the email text:
   - A link to the folder containing the attachment.
   - Information about the expiration date and a possibly used password.
   - A list of the attachments' file names.

Superordinated action:

Sending a new email (p. 68)

Related topics:

add attachments (p. 70)

5.4.5   Using signatures

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

- create new signature, edit existing signatures, set default signatures
- add a signature to the email text

How to create or edit a signature:

1. Click the **Settings** icon ▣ on the right side of the menu bar. Click on **Settings**.

2. Click on **Mail** in the sidebar. Click on **Signatures**.
    The existing signatures will be shown in the display area.

3. To add a new signature, proceed as follows:

    a. In the display area, click on **Add new signature**. The *Add signature* window opens.

    b. Enter a name for the signature. Enter the text for the signature.
        Define whether the signature is to be entered below or above the email text.
        Click on **Save**.

4. To edit an existing signature, you have the following options:
    - In order to edit a signature's text, click on **Edit** next to the signature.
    - In order to delete a signature, click the **Delete** icon 🗑 next to the signature.

    In **Default signature for new messages** and in **Default signature for replies or forwardings**, you can define the signatures to be used as default.

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

1. Click the **Options** icon ☰ in the button bar.

2. Select a signature from the list.

Superordinated action:

[Sending a new email (p. 68)](#)

5.4.6   Replying to emails

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

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

How to reply to an email:

1. Select an email.

2. Click the **Reply to sender** icon ↰ in the toolbar. To also reply to all other recipients click the **Reply to all recipients** icon ↰.

   You can also use one of the following methods:

   - Click on the **Reply** or **Reply all** button in the detail view.
   - Use the context menu in the email list.

   To send a new email to the sender and the other recipients, click the **More actions** icon ≡ in the detail view. Click on **Send new email**.

3. Fill in the details for sending the email.

Related topics:

Sending a new email (p. 68)
Forwarding emails (p. 73)

5.4.7   Forwarding emails

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

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

If you forward multiple emails, the selected emails are sent as attachments in eml format.

How to forward an email:

1. Select one or several emails.

2. Click the **Forward** icon ↱ in the toolbar.

   You can also use one of the following methods:

   - Click on the **Forward** button in the detail view.
   - Use the context menu in the email list.

3. Select one or more recipients.

4. Fill in the details for sending the email.

Related topics:

Sending a new email (p. 68)
Automatically forwarding emails (p. 74)

5.4.8   Automatically forwarding emails

You can let emails be automatically forwarded to another address.

How to automatically forward emails:

1. Click the **Settings** icon ⚙ on the right side of the menu bar. Click on **Settings**.

2. Click on **Mail** in the sidebar.
    Click on **Auto forward ...** in the display area. The *Auto forward* window opens.

3. Enable the **Auto forward** button ⬭.
    Enter the email address to which you want to forward the messages.
    In order to keep a copy of the email, enable **Keep a copy of the message**.
    The auto forwarding will be entered as email filter. If additional filter rules are to be applied after the auto forwarding, enable **Process subsequent rules**. You can also edit the auto forwarding in the email filter settings.

4. Click on **Apply changes**.

Related topics:

5.4.9   Sending an email to appointment participants

How to send an email to all appointment participants:

1. Depending on the selected view, you have the following options in the Calendar:
    - In a calendar view, click on an appointment with multiple participants. Click the **More actions** icon ☰ in the pop-up.
    - In the list view, select an appointment with multiple participants. Click the **More actions** icon ☰ in the toolbar.

    Click on **Send mail to all participants**.

2. Fill in the details for sending the email.

Related topics:

5.4.10 Sending a vacation notice automatically

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

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

How to create and activate a vacation notice:

1. Click on **View** in the toolbar. Click on **Vacation notice** at the bottom.

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

    The *Vacation notice* window opens.

2. Enable the **Vacation notice** button ⬭.

3. To define the time range for sending the vacation notice, enable **Send vacation notice during this time only**. Set the start and end date.

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

4. Enter a subject and a text for the vacation notice.

5. In order to display all options, click on **Show advanced options**.

    - You can specify an interval for sending a vacation notice if there are several emails from the same sender.
    - You can specify the sender address to be used for sending the vacation notice.
    - The vacation notice will be sent if messages are reaching your primary email address. You can also activate a vacation notice if messages are reaching your other email addresses.

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

- On the email settings page, the **Vacation notice** button is marked with an additional icon.
- In the Email app, a notification is displayed above the email list. If clicking on the notification, the *Vacation notice* window opens.

Tip: The vacation notice will be entered as email filter. You can also edit the vacation notice in the email filter settings.

Related topics:

5.5   Calling the Sender or Another Recipient

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

Prerequisite: You have set up an account with an audio or video conference provider, e.g. Zoom.

How to call an email's sender or recipient:

1. Select an email.

2. Click on the sender or on a recipient in the detail view. A pop-up opens.

   An icon below the name indicates the contact's presence status.

3. In the pop-up, click the **Call** icon. In the menu, click on an audio or video conference provider, e.g. Zoom. The window for calling the contact opens. Click on **Call**.

User interface:

Related topics:

5.6   Adding Email Folders

With email folders you can organize your emails, e.g. by separately saving emails for customers or projects. Learn how to create additional email folders below your primary email account.

How to create a new email folder:

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

2. Click the **Actions** icon ▤ next to the folder name. Click on **Add new folder**.
   A window opens.

3. Enter a name. Click on **Add**.

User interface:

   The Email folder view (p. 60)

Related topics:

   Moving or copying emails (p. 80)
   Managing Emails (p. 78)
   Managing Data with Folders (p. 238)

5.7   Managing Emails

Learn how to organize your emails and about the email actions available:

- Working with tabs (p. 79)
- Moving or copying emails (p. 80)
- Marking emails as read or unread (p. 80)
- Collecting addresses (p. 81)
- Categorizing emails (p. 81)
- Showing the email source (p. 82)
- Using email drafts (p. 82)
- Creating email reminders (p. 82)
- Adding an email to the Portal (p. 83)
- Saving emails (p. 83)
- Importing emails (p. 83)
- Printing emails (p. 84)
- Archiving emails (p. 84)
- Deleting emails (p. 85)
- Cleaning up email folders (p. 86)
- Using Unified Mail (p. 87)

User interface:

The Email toolbar (p. 59)
The Email list (p. 61)
The Email detail view (p. 62)

Related topics:

Adding Email Folders (p. 77)
Sending or Receiving Emails as Deputy (p. 95)

5.7.1   Working with tabs

Tabs allow you to save incoming emails in the **Inbox** folder separated by senders. If clicking on a category, only the emails assigned to this category will be shown in the display area. The following options exist:

- enable or disable tabs
- assign incoming emails to a tab
- edit the tabs view

How to enable or disable the usage of tabs:

1. Click on **View** in the toolbar.

2. Enable or disable the **Use categories** checkbox below Inbox.

How to assign incoming emails in the inbox to tabs:

1. Select the **Inbox** folder in the folder view.
   Emails that have not been assigned to a tab yet, are displayed in the **General** tab.

2. Drag an email from the list to a category in the categories bar and drop it there.
   You can also select an email. Click the **Set category** icon ▷ in the toolbar. Select a tab from the menu.
   A pop-up window notifies you that the email has been moved to the tab.

3. In order to finish the process, do one of the following:
   - In order to only move the selected email to the tab, close the pop-up window.
   - In order to move all existing and future incoming emails from this sender to the tab, click on **Move all messages**.

How to edit the tabs view:

1. Click on **View** in the toolbar. Click on **Configure** below Inbox.
   You can also double-click or right-click on a tab in the tabs bar.
   The *Configure tabs* window opens.

2. To enable or disable a tab, enable or disable the respective checkbox.
   To rename a tab, edit the respective text.
   Note: Some tabs can not be edited.
   In order to hide the tabs bar, click on **Disable tabs**.

3. Click on **Save**.

User interface:

Related topics:

5.7.2   Moving or copying emails

The following options exist:
- move or copy individual emails or a complete email conversation to another email folder
- move all emails of an email folder

How to move or copy an email:

1. Select one or several emails.

2. Click the **More actions icon** ☰ in the toolbar or in the detail view. Select **Move** or **Copy**.
   You can also use the context menu in the email list.
   A window opens.

3. Select a folder. You can also create a new folder.

Tips:
- To move emails of a specific sender to a folder, you can create a new rule when moving emails.
- You can also move the selected objects by dragging the objects from the folder view to a folder.
- In order to move all emails from a folder, click on **All** above the list. Select **Move all messages**.

Related topics:

Adding Email Folders (p. 77)
Creating a new rule when moving (p. 91)

5.7.3   Marking emails as read or unread

Unread E-Mails are marked with the Unread icon ⬤. The following options exist:
- mark single emails as read or unread
- mark all emails of an email folder as read

How to mark an email as unread or read:

1. Select one or several emails.

2. Click the **More actions icon** ☰ in the toolbar or in the detail view. Select **Mark as unread** or **Mark as read**.
   Or:
   - For single emails, click the **Mark as unread** icon ○ or the **Mark as unread** icon ⬤.
   - Use the context menu in the email list.

Tip: To mark all emails in a folder as read, click on **All** above the list. Select **Mark all emails as read**.

Related topics:

Viewing Emails (p. 65)

5.7.4   Collecting addresses

The following options exist:
- Automatically collect new email addresses when sending or reading emails by activating this function in the email settings.
- Manually adding email addresses to an address book

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

1. Select an email.
2. Click on the sender's or a recipient's name in the detail view.
   Click on **Add to address book** in the popup.

Note: This function is only available for new contacts.

Related topics:

Settings for receiving emails (p. 98)
Creating a new contact (p. 116)

5.7.5   Categorizing emails

Depending on the configuration, you have several options for categorizing emails. The following options are available:
- a colored label
- a flag

How to categorize an email:

1. Select one or several emails.
2. To add a colored label, click the **Set color** icon ⬗ in the toolbar or in the detail view. Select a color.
   In order to remove the label, again click the icon in the toolbar or in the detail view. Select **None**.
3. To add a flag, click the **Flag** icon ☆ in the toolbar or in the detail view.
   You can also use the context menu in the email list.
   To remove the flag, use one of the following methods:
   - Again click the icon in the toolbar or in the detail view.
   - Use the context menu in the email list.

Tip: To sort emails by flags, click on **Sort by** above the list.

Related topics:

Viewing Emails (p. 65)

5.7.6   Showing the email source

The email source contains the complete content of an email i.e., the complete email header data.

How to display the email source:

1. Select an email.

2. Click the **More actions** icon ≡ in the toolbar or in the detail view. Select **View source**.
   You can also use the context menu in the email list.

Related topics:

5.7.7   Using email drafts

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

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

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

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

How to use an email draft:

1. Select an email in the **Drafts** folder.

2. Click on **Edit draft** or on **Edit copy** in the toolbar.
   Edit the content.

3. You can finish editing the email or send the email:
   - In order to finish editing the email, click the **Close** icon ✖ in the title bar.
     You can save or delete the draft.
   - To send the E-Mail, click on **Send**.

Related topics:

5.7.8   Creating email reminders

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

How to create an email reminder:

1. Select an email.

2. Click the **More actions** icon ≡ in the toolbar or in the detail view. Select **Reminder**.
   Note: When having selected an email conversation, this function is only available in the detail view, not in the toolbar.

3. Complete the details in the *Remind me* window.

Related topics:

5.7.9   Adding an email to the Portal

You can add an email as widget to the Portal.

How to add an email to the portal:

1. Select an email.
2. Click the **More actions** icon ☰ in the toolbar or in the detail view. Select **Add to portal**.

   Note: When having selected an email conversation, this function is only available in the detail view, not in the toolbar.

Related topics:

Adding Portal widgets (p. 54)

5.7.10 Saving emails

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

How to save an email:

1. Select one or several emails.
2. Click the **More actions** icon ☰ in the toolbar or in the detail view. Select **Save as file**.
3. Fill in the details for saving the file.

Related topics:

Importing emails (p. 83)
Downloading Personal Data (p. 264)

5.7.11 Importing emails

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

How to import an email:

1. Open the email folder to which you want to import the email.
2. Drag the eml file from a file browser or the desktop to the email list.

Related topics:

Saving emails (p. 83)

5.7.12 Printing emails

You can print the content of an email or several emails.

How to print an email's content:

1. Select one or several emails.

2. Click the **More actions** icon ☰ in the toolbar or in the detail view. Click on **Print** in the menu.
   You can also use the context menu in the email list.
   A window with a print preview opens.

3. If required, change the printer settings. Click on the **Print** button.

Related topics:

Archiving emails (p. 84)

5.7.13 Archiving emails

When archiving emails, those emails are moved to the **Archive** folder. The **Archive** folder contains a separate subfolder for each calendar year. The archived emails are saved to those subfolders sorted by the year of receipt. The **Archive** folder is created as soon as you initially use this function. The following options exist:
- archive a folder's emails that are older than 90 days
- archive single emails

How to archive an email folder's content:

1. Select an email folder in the folder view.

2. You have the following options:
   - Click on **All** above the list. Select **Archive all messages**.
   - Click the **Actions** icon ▤ next to the folder name. Click on **Archive all messages**.

3. In the *Archive messages* window click on **Archive**.

How to archive single emails:

1. Select one or several emails.

2. Click the **Archive** icon ▬ in the toolbar.
   You can also use one of the following methods:
   - Press the [a] key on the keyboard.
   - Use the context menu in the email list.

Related topics:

Printing emails (p. 84)

5.7.14 Deleting emails

The following options exist:

- Delete individual emails or entire email conversations. By default, the emails are moved to the Trash folder.
- Delete all emails of an email folder. By default, the emails are moved to the Trash folder.
- Recover deleted emails from the trash.
- Permanently delete emails from the trash. You can also permanently delete all emails from the trash by emptying the trash.

Warning: If you enable the email settings option **permanently remove deleted emails** you will not be able to recover deleted email messages. It is recommended that you not use this setting.

How to delete an email:

1. Select one or several emails.

2. Click the **Delete** icon 🗑 in the toolbar.
   You can also use one of the following methods:
   - Press the [Del] or [Backspace] key on the keyboard.
   - Use the **Delete** button in the detail view.
   - Use the context menu in the email list.

Result: The email will be moved to the **Trash** folder.

How to delete all emails of a folder:

1. In the folder view, select the folder which emails you want to delete.

2. You have the following options:
   - Click on **All** above the list. Select **Delete all messages**.
   - Click the **Actions** icon ▤ next to the folder name. Click on the **Delete all messages** button.

Result: The email will be moved to the **Trash** folder.

How to recover deleted emails:

1. Open the **Trash** folder in the folder view.

2. Select one or several emails.

3. Click the **More actions** icon ☰ in the toolbar. Click on **Move**.

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

How to permanently delete an email:

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

1. Open the **Trash** folder in the folder view.

2. Select one or several emails.

3. Click the **Delete** icon 🗑 in the toolbar.

How to permanently delete the content of the Trash folder:

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

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

2. Click the **Actions** icon ▤ next to the folder name. Click on **Empty folder**.

3. Confirm that you want to empty the folder.

Related topics:

Archiving emails (p. 84)
Cleaning up email folders (p. 86)
Settings for receiving emails (p. 98)

5.7.15 Cleaning up email folders

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

Note: Depending on the configuration, this function is not available as such emails are not displayed.

How to clean up an email folder:

1. In the folder view, select the folder that you want to clean up.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Clean up**.

Related topics:

Deleting emails (p. 85)

5.7.16 Using Unified Mail

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

- In addition to an email account's inbox, the **Unified Mail** folder shows a further view for the account's emails. The emails actually exist only once.

- Emails in the Inbox's subfolders are not displayed in the **Unified Mail** folder.

- The emails in the **Unified Mail** folder are marked with the email account's name in the list.

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

How to activate Unified Mail for an email account:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Accounts**.

3. Click on **Edit** next to an email account in the display area. The settings are displayed in a pop-up.

4. Enable **Use Unified Mail for this account**.

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

Related topics:

5.8   Using Email Filters

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

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

In order to use email filters, proceed as follows:

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

The following options exist:

- Creating new rules (p. 89)
- Adding a condition (p. 90)
- Adding an action (p. 91)
- Creating a new rule when moving (p. 91)
- Creating new rules for the subject and the sender (p. 92)
- Changing a rule (p. 92)
- Applying a rule to existing emails (p. 93)

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

Related topics:

Automatically forwarding emails (p. 74)
Sending a vacation notice automatically (p. 75)

5.8.1   Creating new rules

A rule contains:

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

How to create a new rule:

1. Click the **Settings** icon ✜ on the right side of the menu bar. Click on **Settings**.

2. Click on **Mail** in the sidebar. Click on **Filter rules**.

3. In the display area, click on **Add new rule**. The *Create new rule* window opens.
   - Enter a rule name.
   - Click on **Add condition**. Make a selection from the drop-down menu. Complete the condition details.
   - Click on **Add action**. Select an action from the menu. Complete the action details.

4. You can set whether subsequent rules are to be processed if the rule is met. To do so, enable or disable **Process subsequent rules**.

5. To complete the creation, you can do the following:
   - To apply the rule to future incoming emails, click on **Save**.
   - To apply the new rule to future incoming emails and to existing emails, click on **Save and apply**. Select the folder containing the emails to which the rule should be applied.
     Note: Some actions can not be executed if applying a rule to existing emails.

Subordinated actions:

Related topics:

5.8.2   Adding a condition

A condition helps to define the emails to which the action should be applied. You can set one or multiple conditions.

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

1. Click on **Add condition**. Make a selection from the drop-down menu. Note the following:
    -   In order to use an email part that is not contained in the list, select **Header**. Enter a header entry in the Name input field. You can read an email's header by displaying the source data.
    -   In order to consider the **BCC** part, select **Envelope - To**. Envelope includes the email recipients entered in the **To**, **CC** or **BCC** field.
    -   In order to use a part of the email content in the condition, select **Content**.
    -   In order to use the date of receipt in the condition, select **Current Date**.

2. Select a criterion from the drop-down next to the email part. Enter an argument in the input field.

3. You can add further conditions. You can then specify whether one or all conditions are to be met in order to process the actions. To do so, click on **Apply rule if all conditions are met**.

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

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

Example: The following details are used for the condition:
-   Email part "Subject"
-   Criterion "Is exactly"
-   Argument "minutes"

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

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

Superordinated action:

Related topics:

5.8.3   Adding an action

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

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

1. Click on **Add action**. Select an action from the menu.

2. Depending on the action, further buttons and inputs fields are displayed. Use such functions to complete the action.

3. You can add further actions.

    To delete an action, click the **Delete** icon 🗑 next to the action.

Superordinated action:

Related topics:

5.8.4   Creating a new rule when moving

You can create a new rule when moving an email to another folder. Incoming emails from this sender will then be moved to this folder automatically.

How to create a new rule when moving an email

1. Select an email.

2. Click the **More actions** icon ≡ in the toolbar. Click on **Move**.

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

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

3. Enable **Create filter rule**. A note with details about the filter is displayed.

    Click on the **Move** button. The *Create new rule* window opens.

4. Enter a rule name. You can adjust the conditions or actions. Click on **Save**.

    The email will be moved. The new rule will be created.

Related topics:

5.8.5 Creating new rules for the subject and the sender

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

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

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

Related topics:

5.8.6 Changing a rule

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

How to change existing rules:

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

Related topics:

5.8.7   Applying a rule to existing emails

You can filter existing emails later by applying a rule to an email folder.

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

How to apply a rule to existing emails:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.
2. Click on **Mail** in the sidebar. Click on **Filter rules**.
3. Click on **Apply** next to the rule. Select the folder containing the emails to which the rule should be applied.
    Note: Some actions can not be executed if applying a rule to existing emails.

Options:

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

Related topics:

Creating new rules (p. 89)
Creating a new rule when moving (p. 91)
Creating new rules for the subject and the sender (p. 92)

5.9   Searching for Emails

Learn how to search for emails by using the following search criteria:

- search terms for subject, email text, sender, recipients, attachment file name
- Search terms for a time range. Searches for emails that you received within the time range. You define a valid time range with the following details.
    - The key words today, yesterday, last week, last month, last year
    - The key words for those time intervals: last 7 days, last 30 days, last 365 days
    - A day of the week, e.g. Monday
    - A specific month, e.g. July
    - A four digit date, e.g. 2015
    - A date, e.g. 1/31/2015
    - A date interval, e.g. 12/1/2014 - 1/31/2015
- folders that are to be searched
- only search for emails with an attachment

How to search for emails:

1. Click on the **Search** input field. Enter a search term in the input field.
   The search menu opens.

2. Define the data sources to be searched by clicking on an entry in the search menu.
   - If clicking on the search term or pressing enter, the following data sources are searched: sender, recipient, subject, email text
   - In order to only search in the subject, click on **in subject**.
     In order to only search in the E-Mail text, click on **in mail text**.
     To search within the attachments' file names, click on **in attachment file names**.
   - In order to search for senders or recipients matching the search term, click on a name. You can define whether to search the sender, recipients or both. To do so, click on **From** ▼ next to the name.
   - In order to search for emails within a specific time range, use a valid time range as search term.

   The search results are displayed in the list that is shown in the display area. For each search result, the folder with the found object is displayed.

3. To select a folder for the search, click on the folder name next to the input field.
   - If you select **All folders**, all folders and subfolders of the internal email account are searched. Note: Depending on the email server, this function might not be available. In this case, only the current folder will be searched, no subfolders.
   - If you select a specific folder or the folder of an external email account, only this folder is searched, but no subfolders.

4. To limit the search to E-Mails with an attachment, click on **Options** ▼ next to the input field. Enable **Has attachment**.

5. To refine the search result, enter further search terms: To remove a search term, click the **Remove** icon ✖ next to the search term.

6. In order to finish the search, click the **Cancel search** icon ⊗ in the input field.

User interface:

Related topics:

5.10   Sending or Receiving Emails as Deputy

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

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

How to send emails as deputy:

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

   Next to **On behalf of**, the sender on whose behalf you want to send the email will be pre-entered.

2. Complete the steps for composing and sending the email.

   Depending on the configuration, the email text will include a note informing the recipients that the email has been sent by a deputy.

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

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

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

How to read, edit or organize emails as deputy:

1. In the folder tree under **Shared folders**, open the inbox of the user who appointed you as deputy.

2. Depending on the permissions that have been granted to you, you can do the following:
   - As viewer, you can read all emails. You can mark a single email as read, assign a color to the email or print the email.
   - As editor, you can also mark all emails in the inbox as read.
   - As author, you can also create subfolders, move a single email or move all emails in the inbox.

User interface:

The Email editing window (p. 64)

Related topics:

Sending Emails (p. 67)
Managing Emails (p. 78)

Creating, Editing or Managing Appointments as Deputy (p. 180)
Appointing a Deputy (p. 257)

5.11   Adding Email Accounts

As default, you use your primary email account in the groupware. If you use further email accounts like e.g. GMail, you can add those accounts to the groupware. This allows you to access those accounts' emails from within the groupware.

How to add an email account:

1. Click on **Add Mail Account** in the folder view. The *Add Mail Account* window opens.

2. Click an icon. The further procedure depends on the email account provider.
   - For some providers, a new browser window opens. Log in with your credentials to grant access to the email account.
   - If the provider asks you for the permission to access the data, grant this permission.
   - For some providers, enter your credentials in the *Add Mail Account* window. Then, click on **Add**.

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

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

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

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

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

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

User interface:

The Email folder view (p. 60)

Related topics:

Using Unified Mail (p. 87)
select a sender address (p. 69)
Editing the primary email account (p. 261)
Viewing, editing, deleting accounts (p. 262)

5.12   Email Settings

The following options exist:

-
-

5.12.1 Settings for receiving emails

How to use the settings for receiving emails:

1. Click the **Settings** icon ▣ on the right side of the menu bar. Click on **Settings**.

2. Click on **Mail** in the sidebar.

Depending on the configuration, the following settings are available:

Buttons

- **Vacation notice**
  See Sending a vacation notice automatically (p. 75)
- **Auto forward**
  See Automatically forwarding emails (p. 74)
- **Change IMAP subscriptions**
  See Subscribing to shared or personal email folders (p. 252)

View

- **allow HTML formatted email messages**
  Specifies whether or not displaying HTML messages is allowed.
- **Color quoted lines**
  Specifies whether original messages are highlighted and introduced with a vertical line. This option assumes that the original mail text is not attached but appended to the email.
- **Use fixed-width font for text mails**
  Specifies whether a fixed-width font is used when displaying a plain text email.
- **show requests for read receipts**
  Defines whether a return receipt is displayed if a received email includes receipt confirmation request.
- **show folder with all unseen messages**
  Defines whether the **Unread messages** folder is displayed in the folder view.

Notification sounds

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

Behavior

- **permanently remove deleted emails**
  Defines whether deleted emails will be removed permanently or whether they will go to the trash folder.
  Warning: Permanently removed email messages can not be restored.
  See Deleting emails (p. 85)
- **Automatically collect contacts in the "Collected addresses" folder while sending emails**
  Defines whether new email addresses are automatically collected in the **Collected contacts** folder when sending a new email.
- **Automatically collect contacts in the "Collected addresses" folder while reading emails**
  Defines whether new email addresses are automatically collected in the **Collected addresses** folder when reading a new email.
- **ask for mailto link registration**
  Defines whether the groupware can ask for a mailto link registration.

Related topics:

5.12.2 Settings for composing emails

How to use the settings for composing emails:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. Click on **Mail** in the sidebar. Click on **Compose**.

Depending on the configuration, the following settings are available:

Format emails as
Defines the format in which emails are sent:
- **HTML**
  The email will be sent with html markup. You can format the email text.
- **Plain text**
  The email text will be sent as plain text without formatting.
- **HTML and plain text**
  The email will be sent with html markup and additionally as plain text.

Default font style
Defines the preset font style for email text in html format.

forward emails as
Specifies how an email text is sent when forwarding the email.
- **Inline**
  The text is sent within the new email text.
- **Attachment**
  The text is sent as attachment to the new email.

Advanced settings
- **Append vcard**
  Specifies whether your contact data will be attached to a new email in the vCard format.
- **Insert the original email text to a reply**
  Specifies whether the original email text is appended to an email reply.
- **Confirm recipients when replying to a mailing list**
  Defines whether you have to confirm the recipient when replying to a mailing list.
- **Default sender address**
  Specifies the pre-set sender address for new emails.
  Note: The sender's name is displayed in front of the sender address. If you enter a name in the **Your name** input field in the account settings, this name overwrites the preset sender name.
- **Always add the following recipient to blind carbon copy (BCC)**
  To send each outgoing email as blind copy (BCC) to an email address, enter the wanted email address in this field.

Related topics:

6   Address Book

Learn how to record, use and organize your contacts in the Address Book app.

How to launch the Address Book app:

Click the **All Applications** icon ⊞ in the menu bar. Click on **Address Book** in the App Launcher.

Topics:

6.1   The Address Book Components

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

- The Address Book toolbar (p. 103)
- The Address Book folder view (p. 104)
- The Address Book navigation bar (p. 104)
- The Address Book display area (p. 104)
  - The Address Book list (p. 105)
  - The Address Book detail view (p. 105)
- The contact editing window (p. 106)
- The distribution list editing window (p. 106)

6.1.1   The Address Book toolbar

Contains functions for adding, editing and organizing contacts. Notes:
- Some functions are only available if you opened an address book for which you have the appropriate permissions to create or edit objects.
- Some buttons are only displayed if the selected contacts have an email address.

Content
- **New contact**. Creates a new contact or a new distribution list.
- **Edit**. Edits the contact's data.
- **Send email**. Sends an email to the contact.
- **Invite**. Invites the contact to an appointment.
- **Delete**. Deletes the contacts selected by you.
- **More actions** icon ≡. Opens a menu with further functions.
- **View**. Opens a menu with checkboxes for controlling the view.
    - **Folder view**. Opens or closes the folder view.
    - **Checkboxes**. Displays a checkbox next to each contact in the list. This allows to select multiple contacts to edit them at once.

General description of the user interface:

The toolbar (p. 26)

Related topics:

Adding Contacts (p. 115)
Adding Distribution Lists (p. 118)
Managing Contacts (p. 127)

6.1.2   The Address Book folder view

Displays the address books.

In order to display the folder view, click on **View** in the toolbar. Enable **Folder view**.

Content

- **My address books**. Contains your personal address books.
- **Add new address book**. Opens a menu with functions for creating address books and for subscribing to external or shared address books.
- **My contact data**. Opens a window where you can adjust your contact data in the global address book.
- **Public address books**. Contains address books shared with all users.
- **Shared address books**. Contains address books shared with you by other users.

Depending on the configuration, public address books and shared address books might not be available.

General description of the user interface:

Related topics:

6.1.3   The Address Book navigation bar

Contains letters in alphabetical order. If clicking on a letter, the list jumps to the contacts with this initial letter.

Related topics:

6.1.4   The Address Book display area

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

General description of the user interface:

Related topics:

6.1.5   The Address Book list

Displays a list of contacts in the opened address book.

Content

▪ The name of the selected address book.
  The number of contacts in this address book.

▪ The following details are displayed for each contact:

  ▫ a picture if uploaded

  ▫ last name, first name

  ▫ business data, if entered
  Names that start with a figure or a special character are displayed below **#** at the top of the list. Names that start with a special sign are displayed below **Ω** at the bottom of the list.

Related topics:

6.1.6   The Address Book detail view

Shows the data of the contact that you selected in the list. If double-clicking on the contact in the list, the data are displayed in a window.

Content

▪ a picture if uploaded

▪ last name, first name

▪ business data, if entered

▪ Depending on the configuration: The contact's current availability for calls

▪ Depending on the configuration: Icons for communicating with the contact:

  ▫ **Email** ✉. Opens the window for composing an email.

  ▫ **Call** 📞. Opens a menu with functions for calling.

  ▫ **Invite** 📅. Opens the window for creating an appointment.

▪ Further contact data, if set:

  ▫ personal data, business data

  ▫ Email addresses. If clicking on an email address, the page for sending a new email is displayed.

  ▫ Business and private phone numbers. If clicking on a number, a function for making a call opens, if available.

  ▫ Business and private addresses. In the address book settings, you can define whether a map service for displaying the address should be used when clicking on an address.

  ▫ Attachments

Related topics:

6.1.7   The contact editing window

This window is used when creating a new contact or editing an existing one.

In order to open the window, do one of the following:
- Select **New contact** from the toolbar. Click on **New contact**.
- Select a contact. Click on **Edit** in the toolbar.

Content
- Contact picture
  Click on the contact picture to edit it or to upload a new contact picture.
- Contact data input fields:
  - **First name**, **Last name**
  - **Company**, **Department**
  - **Email 1**, **Cell phone**
- Elements for adding additional input fields:
  - ⊕ **Add personal info**
  - ⊕ **Add business info**
  - ⊕ **Add email, phone, fax**
  If clicking the **Remove field** icon ⊖, an additional field and its data will be deleted.
- **Note** input field
- **Add postal address**. Adds input fields for different postal addresses.
- **Add attachment**. Adds files.

General description of the user interface:

Related topics:

6.1.8   The distribution list editing window

This window is used when creating a new distribution list or editing an existing one.

In order to open the window, do one of the following:
- Select **New contact** from the toolbar. Click on **New distribution list**.
- Select a distribution list. Click on **Edit** in the toolbar.

Content
- input field for the name of the new distribution list
- input field for the email addresses of the distribution list's contacts

General description of the user interface:

Related topics:

6.2   Displaying Contacts

Learn how to select contacts from different address book and display their data. Depending on the configuration, you have the following options:

- Displaying an address book's contacts (p. 108)
- Displaying contacts in the address list (p. 109)
- Displaying contacts in the halo view (p. 110)

Related topics:

automatically add email addresses to input field (p. 112)

6.2.1   Displaying an address book's contacts

In the folder view, you can open an address book, select specific contacts or display their data.

How to display a contact:

1. Select an address book in the folder view.
    Your personal address book named **Contacts** can be found in the folder view below **My address books**.

2. In order to display contacts with a certain initial letter, click a letter in the **navigation bar**.

3. Click on a contact in the list. The contact's data is displayed in the detail view.

Options:
- Use the cursor keys to browse the list.
- You can open a contact in a window by double-clicking on the contact in the list.

User interface:

Related topics:

6.2.2   Displaying contacts in the address list

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

In the address list, you can simultaneously find and display contacts from multiple address books. You can define the address books to be searched for contacts. The following functions are available:

- search for the name, department, position, phone number, email address
- set a filter for defining the address books to be displayed and selected for the search
- select the address books to be searched

How to display contacts in the global address list:

1. Click the **All Applications** icon ⊞ in the menu bar.

   Click on **Address list** in the App Launcher.

   The *Global address list* window opens. Like editing windows, the window can be moved, minimized and its size can be adjusted.

2. Enter a search term in **Search**.

   All contacts that include the search term in the following data will be displayed: name, department, position, phone number, email address

3. You can limit the search result by using the following functions:

   - Enter a term in **Filter** to define the address books to be displayed in **Address list**.

   - In **Address list**, select the address books to be searched.

4. To show a contact's details, click the **Show contact details** icon on the right-hand side. The contact's Halo View will be displayed in a pop-up.

User interface:

The editing window (p. 31)

Related topics:

Displaying an address book's contacts (p. 108)
Displaying contacts in the halo view (p. 110)

6.2.3   Displaying contacts in the halo view

You can use the halo view in the Email, Calendar or Tasks app to display all relevant information about a contact.

How to display a contact in the halo view:

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

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

Depending on the contact's entries in the address book, those data will be displayed in a pop-up:

- a picture if uploaded
- last name, first name
- business data, if entered
- Depending on the configuration: The contact's current availability for calls
- Depending on the configuration: Icons for communicating with the contact:
  - **Email** (✉). Opens the window for composing an email.
  - **Call** (📞). Opens a menu with functions for calling.
  - **Invite** (📅). Opens the window for creating an appointment.
- Further contact data, if set:
  - personal data, business data
  - Email addresses. If clicking on an email address, the page for sending a new email is displayed.
  - Business and private phone numbers. If clicking on a number, a function for making a call opens, if available.
  - Business and private addresses. In the address book settings, you can define whether a map service for displaying the address should be used when clicking on an address.
  - Attachments
- The address book in which the contact is saved
- Your recent conversations with this contact If clicking on an email, its content will be displayed in a pop-up.
- Shared appointments with this contact. If clicking on an appointment, its data is shown in a pop-up.

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

General description of the user interface:

Related topics:

6.3   Viewing or Saving Contact Attachments

Learn how to view, read or download contact attachments.

The file names of attachments are displayed in the display area. The following functions are available:
- display the attachment in the Viewer
- download the attachment
- save the attachment to Drive

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

How to use the contact attachment functions:

1. Select a contact with an attachment.

2. Click on an attachment's name in the detail view. Click on the function wanted.

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

Note: Depending on the configuration, attachments will be checked for viruses before being downloaded.
- If no virus is found, the attachments will be downloaded without any further notification.
- If a virus scan was not possible or a virus was found, a window with a respective warning opens. In this case you can cancel the download.

User interface:

Related topics:

6.4   automatically add email addresses to input field

Learn how to automatically add an email address from an address book if an email address is to be entered into the input field when sending an email or inviting participants to an appointment. Depending on the configuration, you have the following options:

- Automatically adding email addresses from an address book (p. 113)
- Automatically adding email addresses from the address list (p. 114)

Related topics:

Displaying Contacts (p. 107)

6.4.1 Automatically adding email addresses from an address book

Note: Depending on the configuration, the window described below might not be available. In case the window is not available, the global address list will be used, see Automatically adding email addresses from the address list (p. 114).

With the *Select contacts* window, you can automatically add email addresses from an address book. You can for example use this function if an email address needs to be entered in the input field when sending an email or inviting participants to an appointment.

How to automatically add email addresses from an address book:

1. Click the **Select contacts** icon in an editing window.
   This icon will be available in the input fields for email addresses, while:
   - selecting the recipients when sending an email
   - adding participants to an appointment or task
   - inviting persons to a share

   The *Select contacts* window opens.

2. You have the following possibilities to find a specific contact:
   - Enter a name in **Search**.
   - To view the contacts of a specific address book, click on **All folders**. Select an address book from the list. Depending on the configuration, you can select a department from the list.

3. Select at least one contact. The selected items will be displayed below the list. To undo the selection, click on **Clear selection**.
   You can also use your system's multi selection functions.

4. To automatically insert the email addresses of the contacts selected, click on **Select**.

User interface:

The editing window (p. 31)

Superordinate actions:

Sending a new email (p. 68)
Creating new distribution lists (p. 119)
Adding participants or resources (p. 159)
Using the scheduling view (p. 160)
Adding participants to a task (p. 195)
Sharing data (p. 246)

Related topics:

Automatically adding email addresses from the address list (p. 114)

6.4.2   Automatically adding email addresses from the address list

Note: Depending on the configuration, the address list might not be available. In case the address list is not available, the *Select contacts* window will be used, see Automatically adding email addresses from an address book (p. 113).

In the *Global address list* window you can use various functions for finding and automatically adding email addresses. You can for example use this function if an email address needs to be entered in the input field when sending an email or inviting participants to an appointment. In the *Global address list* window, the following functions are available:

▪ search for the name, department, position, phone number, email address
▪ set a filter for defining the address lists to be displayed and selected
▪ select the address list to be searched

How to automatically add email addresses from the address list:

1. Click the **Select contacts** icon in an editing window.
   This icon will be available in the input fields for email addresses, while:
   ▪ selecting the recipients when sending an email
   ▪ adding participants to an appointment or task
   ▪ inviting persons to a share
   The *Global address list* window opens.

2. Enter a search term in **Search**.
   All contacts that include the search term in the following data will be displayed: name, department, position, phone number, email address

3. You can limit the search result by using the following functions:
   ▪ Enter a term in **Filter** to define the address lists to be displayed in **Address list**.
   ▪ In **Address list**, select the address list to be searched

4. Select at least one contact.
   The selected contacts will be displayed in a list at the bottom. You can remove single contacts from the list.

5. Repeat steps 1 to 2 to find and select further contacts.

6. To automatically insert the email addresses of the contacts selected, click on **Select**.

Superordinate actions:

Sending a new email (p. 68)
Creating new distribution lists (p. 119)
Adding participants or resources (p. 159)
Using the scheduling view (p. 160)
Adding participants to a task (p. 195)
Sharing data (p. 246)

Related topics:

Automatically adding email addresses from an address book (p. 113)

6.5   Adding Contacts

Learn how to add contacts:

- Creating a new contact (p. 116)
- add attachments (p. 117)
- Adding a contact from a vCard attachment (p. 117)

User interface:

The Address Book toolbar (p. 103)

Related topics:

6.5.1   Creating a new contact

How to create a new contact:

1. In the folder view, open an address book for which you have the permission to create objects.

2. Select **New contact** from the toolbar. Click on **New contact**.

3. Enter the data.

4. Click on **Save**.

Options:

▪ To add a contact picture, click on the empty contact picture. The *Edit image* window opens.

    ▫ To upload an existing picture, click on **Upload a photo**.

    ▫ To make a new picture with the device camera, click the **Take photo** icon.

    ▫ You can adjust the image section with the zoom and by moving or rotating the photo.
Click on **Apply**. The photo will be inserted.

▪ In order to edit or delete a picture, click on the picture.

▪ To add additional input fields, click on those elements:

        ⊕ **Add personal info**
        ⊕ **Add business info**
        ⊕ **Add email, phone, fax**
        ⊕ **Add postal address**

▪ To remove an additional input field and its data, click on **Remove field** ⊖ next to the input field.

User interface:

    The contact editing window (p. 106)

Subordinated actions:

    add attachments (p. 117)

Related topics:

    Creating new distribution lists (p. 119)
    Adding a contact from a vCard attachment (p. 117)
    Collecting addresses (p. 81)
    Editing Contacts or Distribution Lists (p. 121)

6.5.2   add attachments

How to add attachments in the contact editing window:

1. Click on **Add attachment** at the bottom.

2. In order to remove an attachment, click on **Remove attachment** ⊖ next to the attachment.

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

Superordinated action:

6.5.3   Adding a contact from a vCard attachment

You can add a contact from a vCard attachment to an email. A vCard attachment per default has the name extension vcf.

How to add a contact from an email's vCard attachment:

1. Select an email with a vCard attachment in the Email application.

2. Click on **Add to address book** in the detail view.

Related topics:

6.6   Adding Distribution Lists

Learn how to create distribution lists. Distribution lists can be used to send emails, appointment invitations or shared items to a number of persons by entering the name of the distribution list instead of each person's email address.

The following options exist:

- Creating new distribution lists (p. 119)
- Saving email recipients as distribution list (p. 120)
- Creating a distribution list from a list of participants (p. 120)

User interface:

The Address Book toolbar (p. 103)

Related topics:

Adding Contacts (p. 115)

6.6.1   Creating new distribution lists

In order to create a new distribution list, enter a name and add contacts.

How to create a new distribution list:

1. Open an address book in the folder view.
   Note: Open an address book for which you have the appropriate permissions to create objects.

2. Select **New contact** from the toolbar. Click on **New distribution list**.

3. Enter a name for the distribution list in the **Name** field.

4. Enter a participant's email address in the **Participants** field.
   - While entering the recipients, matching suggestions will be displayed. To accept a suggestion, click on it.
   - To select contacts from an address book, click the **Select contact** icon ⬆ on the right side of the input field.

   In order to add further contacts, repeat this step. In order to remove a contact, click 🗑 next to the contact.

5. Click on **Create list**.

User interface:

   The distribution list editing window (p. 106)

Subordinated actions:

   Automatically adding email addresses from an address book (p. 113)
   Automatically adding email addresses from the address list (p. 114)

Related topics:

   Saving email recipients as distribution list (p. 120)
   Creating a distribution list from a list of participants (p. 120)
   Creating a new contact (p. 116)

   Editing Contacts or Distribution Lists (p. 121)

6.6.2   Saving email recipients as distribution list

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

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

1. Select an email in the Email app.
2. Click the **More actions** icon ≡ in the detail view.
   Click on **Save as distribution list**.
3. Complete the details for creating the distribution list.

Related topics:

6.6.3   Creating a distribution list from a list of participants

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

1. Depending on the selected view, you have the following options in the Calendar:
   - In a calendar view, click on an appointment with multiple participants. Click the **More actions** icon ≡ in the pop-up.
   - In the list view, select an appointment with multiple participants. Click the **More actions** icon ≡ in the toolbar.
   Click on **Save as distribution list**.
2. Complete the details for creating the distribution list.

Related topics:

6.7   Editing Contacts or Distribution Lists

Learn how to edit the data of contacts or distribution lists later.

Prerequisite: You have the appropriate permissions to edit objects in the address book containing the contact or distribution list.

How to edit a contact or distribution list:

1. Select a contact or a distribution list from the list.

2. Click on **Edit** in the toolbar. The data will be displayed.

3. Edit the data.

4. Click on **Save**.

User interface:

Related topics:

Subordinated actions:

6.8   call contacts

Learn how to call a contact by contacting the contact via audio or video conference or phone.

Prerequisite:
- You have set up an account with an audio or video conference provider, e.g. Zoom.
- Your computer has been configured to allow you to make phone calls over the Internet.

How to call a contact:

1. Select a contact from the list.

   In the detail view, an icon below the name indicates the contact's presence status.

2. Click the **Call** icon 📞 in the detail view. Use one of the following methods:
   - In the menu, click on an audio or video conference provider, e.g. Zoom. The window for calling the contact opens. Click on **Call**.
   - Select a phone number from the menu.

You can also call a contact in the halo view.

User interface:

The Address Book detail view (p. 105)

Related topics:

Displaying contacts in the halo view (p. 110)

Calling the Sender or Another Recipient (p. 76)
Calling Appointment Participants (p. 167)
Calling Task Participants (p. 198)
Scheduling audio/video conferences (p. 156)

Seting up and Configuring the Zoom Integration (p. 46)
Setting the Presence Status (p. 48)

6.9   Adding Address Books

With address books you can organize your contacts e.g. by separately saving them as business or private contacts. Learn how to create address books, use contacts from external address books and set the view for shared address books.

The following options exist:

- Adding personal address books (p. 124)
- Subscribing to external address books (p. 124)
- Refreshing and managing address book subscriptions (p. 125)
- Subscribing to public and shared address books (p. 126)

User interface:

The Address Book folder view (p. 104)

Related topics:

Managing Contacts (p. 127)
Managing Data with Folders (p. 238)

6.9.1   Adding personal address books

You can create additional personal address books below My address books.

How to create a new personal address book:

1. In the folder view, click on **Add new address book**. A menu opens.
    Click on **Personal address book**. A window opens.

2. Enter a name. In case the new address book should be a public address book, enable **Add as public folder**. Click on **Add**.

Related topics:

6.9.2   Subscribing to external address books

You can use your contacts from other providers within the groupware by subscribing to your external address books.

Notes:
- You can sync changes from the external address book by refreshing the subscribed address book.
- You can not create or edit contacts in the subscribed address book.

How to subscribe to external address books:

1. In the folder view, click on **Add new address book**. A menu opens.
    Click on **Subscribe address book**. The *Subscribe to address book* window opens.

2. Click one of the icons. Depending on the data source, the further procedure varies.
    - For some data sources, a new browser window opens. Log in with your credentials to grant access to the address data.
    - If the provider asks you for the permission to access the data, grant this permission.
    - For some data sources, you have to enter your credentials for the data source in the *Subscribe to address book* window.

Tip: A subscribed address book is marked with the **Subscriptions** icon ☁. If clicking the icon, the subscription settings will be opened.

Related topics:

6.9.3   Refreshing and managing address book subscriptions

The following options exist:
- refresh an address book subscription
- show all subscriptions
- disable or enable a subscription
- remove a subscription

How to manage address book subscriptions:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Subscriptions**.

3. Use the following methods:
    - To refresh an address book subscription, click on **Refresh** next to a subscription in the display area.
    - To show the folder with the data you have subscribed to, click on the navigation path below the subscription's name.
      To only display this information for a specific folder, click the **Subscriptions** icon ☁ next to a folder with subscriptions, in the folder view.
    - To disable or enable a subscription, click on **Disable** or **Enable** in the display area next to a subscription.
    - To remove a subscription, click the **Delete** icon 🗑 next to a subscriptions in the display area.

Related topics:

6.9.4 Subscribing to public and shared address books

Address books that are public or shared by other users can be used as follows:

- You can define which public and shared address books are displayed in the folder view by subscribing to such address books.
  This helps you to keep a better overview if there are many public and shared address books in your groupware environment.
- If you subscribed to such an address book, you can set whether this address book will be synchronized with other clients, e.g. with your smartphone.
- If you no longer need such an address book, you can cancel the subscription.

How to define the address books to which you want to subscribe and which are to be synchronized:

1. In the folder view, click on **Add new address book**. A menu opens.

   Click on **Subscribe shared address book**.

   You can also use the **Subscribe shared address books** button in the address book settings.

   A window opens. It shows your private, the public and shared address books.

2. If you want an address book to be displayed, enable the **Subscribe to address book** button ⬭.

   To define that a displayed address book is synchronized, enable the **Synchronize via DAV** checkbox.

   If you no longer want an address book to be displayed and synchronized, disable the **Subscribe to address book** button ⬭.

User interface:

Related topics:

6.10   Managing Contacts

Learn how to organize your contacts and about the contact actions available:

- Sending emails from within an address book (p. 128)
- Inviting contacts to an appointment (p. 128)
- Moving or copying contacts (p. 128)
- Sending contacts as vCard (p. 129)
- Adding contacts as Xing contacts (p. 129)
- Inviting contacts to Xing (p. 129)
- Importing contacts (p. 130)
- Exporting contacts (p. 131)
- Printing contacts (p. 131)
- Deleting contacts (p. 132)

User interface:

The Address Book toolbar (p. 103)
The Address Book detail view (p. 105)

Related topics:

Adding Address Books (p. 123)

6.10.1 Sending emails from within an address book

You can send an email from within your address book to contacts or to a distribution list.

How to send an email from within an address book:

1. Select at least one contact or distribution list from the list.

2. Click on **Send email** in the toolbar.
   If you have selected a single contact, you can also click the **Email** icon (✉) in the detail view.

3. Fill in the details for sending the email.

Related topics:

   Sending a new email (p. 68)

6.10.2 Inviting contacts to an appointment

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

How to invite contacts to an appointment:

1. Select at least one contact or distribution list from the list.

2. Click on **Invite** in the toolbar.
   If you have selected a single contact, you can also click the **Invite** icon (📅) in the detail view.

3. Complete the details for creating the appointment.

Related topics:

   Creating new appointments (p. 154)

6.10.3 Moving or copying contacts

You can move or copy contacts or distribution lists to another address book.

Notes:
- You can not move or copy contacts or distribution lists to the global address book.
- You can not move contacts from the global address book.

How to move or copy contacts to another address book:

1. Select at least one contact or distribution list from the list.

2. Click the **More actions** icon ≡ in the toolbar. Click on **Move** or **Copy**.
   A window opens.

3. Select an address book. You can create a new address book by clicking on **Create folder**.
   Click on **Move** or **Copy**.

Tip: You can also move the selected objects by dragging the objects from the folder view to an address book.

Related topics:

   Adding personal address books (p. 124)

6.10.4 Sending contacts as vCard

You can send contacts or distribution lists as vCard attachment to an email.

How to send a contact as vCard attachment:

1. Select at least one contact or distribution list from the list.

2. Click the **More actions** icon ☰ in the toolbar. Click on **Send as vCard**.

3. Fill in the details for sending the email.

Related topics:

6.10.5 Adding contacts as Xing contacts

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

How to add a contact as Xing contact:

1. Select a contact from the list.

2. Click the **More actions** icon ☰ in the toolbar. Click on **Add to Xing**.

Related topics:

6.10.6 Inviting contacts to Xing

You can invite a contact to Xing if this contact has no Xing account yet.

How to invite a contact to Xing:

1. Select a contact from the list.

2. Click the **More actions** icon ☰ in the toolbar. Click on **Invite to Xing**.

Related topics:

6.10.7 Importing contacts

You can import contacts from files that have the following formats:

- vCard. Note the following:
  - Make sure the file to be imported contains correct vCard data.
  - For each contact only one private and one business address are imported. If the imported vCard file contains additional private and business addresses, those addresses are ignored when importing.
- CSV The following CSV files are supported:
  - Standard CSV files with comma separated values
  - CSV files from the following Microsoft Outlook versions:
    - Microsoft Outlook 2003, 2007
    - German, English, and French language versions

  The correct format of the CSV file is automatically recognized. The data assignment to specific data fields depends on your configuration. Further information are provided by your administrator or host.

How to import contacts from a file:

1. Select the address book for importing the contacts to in the folder view.

2. Click the **Actions** icon ▤ next to the address book. Click on **Import**.

3. Select the wanted format in the *Import from file* window. Click on **Upload file**. Select a suitable file.

4. Click on **Import**.

Related topics:

6.10.8 Exporting contacts

You can export contacts or distribution lists to those formats:
- vCard. You can e.g. use this format to exchange contacts with other email applications.
- CSV You can use this format to export contacts to spreadsheet formats.

You can export single contacts or distribution lists or all objects from an address book.

How to export single contacts or distribution lists:

1. Select at least one contact or distribution list from the list.

2. Click the **More actions** icon ≡ in the toolbar. Click on **Export**. The *Export selected* window opens.

3. Select a format.
    To export contacts and distribution lists, enable **With distribution lists**.

4. Click on **Export**. Complete the entries.

How to export all contacts from an address book:

1. Select a personal or public address book in the folder view.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Export**. The *Export folder* window opens.

3. Select a format.
    To export contacts and distribution lists, enable **With distribution lists**.

4. Click on **Export**. Complete the entries.

Related topics:

6.10.9 Printing contacts

You can print the data of a single contact or of multiple contacts. You can select between different print layouts.

How to print a contact's data:

1. Open an address book in the folder view. Select a single contact or multiple contacts from the list.

2. Click on **More actions** in the toolbar. Click on **Print**. The *Select print layout* window opens.

3. Select a print layout. Click on **Print**.
    Complete the steps for starting the printing process.

4. Close the print preview window.

6.10.10 Deleting contacts

Warning: If you delete contacts or distribution lists, those items are irrevocably lost.

You can delete contacts or distribution lists from an address book if you have the permission to delete items from this address book.

- You can not delete contacts from the global address book.
- If you delete a distribution list, the distribution list's contacts are kept.

How to delete contacts:

1. Select at least one contact or distribution list from the list.
2. Click on **Delete** in the toolbar.
3. Confirm that you want to delete the items.

6.11   Searching for Contacts

Learn how to search for contacts by using the following search criteria:

- search terms for name, email address, phone number, department, address
  Depending on the configuration, you can use department as search term.
- address books that are to be searched
- type: all, contact, distribution list

How to search for contacts:

1. Click on the **Search** input field. Enter a search term in the input field.

   The search menu opens.

2. Define the data sources to be searched by clicking on an entry in the search menu.

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

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

3. To limit the search to specific contacts, click the **Options** icon ▼ in the search field. Use the following methods:

   - **Folders** allows to define the address books to be searched.
     If you select **All folders**, all private, public, and shared address books are searched.
   - **Type** allows to limit the search to contacts or distribution lists.

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

User interface:

The search bar (p. 25)

Related topics:

Displaying Contacts (p. 107)

6.12   Address Book Settings

How to use the address book settings:

1. Click the **Settings** icon ⊡ on the right side of the menu bar. Click on **Settings**.

2. Click on **Address Book** in the sidebar.

Depending on the configuration, the following settings are available:

Buttons

▪ **Subscribing to shared address books**
See Subscribing to public and shared address books (p. 126)

▪ **my contact data**
In order to change your personal contact data in the global address book, click on this button. See Changing Personal Contact Data (p. 41)

Display of names

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

Initial folder

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

Link postal addresses with map service

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

Related topics:

Displaying Contacts (p. 107)
The Address Book detail view (p. 105)

7   Calendar

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

How to start the Calendar app:

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

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

Topics:

7.1   **The Calendar Components**

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

- The Calendar toolbar (p. 137)
- The mini calendar (p. 137)
- The Calendar folder view (p. 139)
- The Calendar display area (p. 139)
    - Day, Work week, Week, Month or Year calendar view. (p. 140)
    - The date picker (p. 141)
    - The Calendar pop-up (p. 142)
    - The Calendar list (p. 142)
    - The Calendar detail view (p. 144)
- The scheduling view (p. 145)
- The appointment editing window (p. 146)

7.1.1   The Calendar toolbar

Contains functions for adding, editing and organizing appointments. Note: Some functions are only available if you opened a calendar for which you have the appropriate permissions to create or edit objects.

Content

- **New appointment**. Creates a new appointment.
- **Scheduling**. Opens the scheduling view for scheduling appointments with multiple participants.
- If a calendar view is selected in **View**: **Today** button. Selects the time frame with the current day.
- **View**. Opens a menu with checkboxes for controlling the view.
    - **Day**, **Work week**, **Week**, **Month** or **Year**. Selects a calendar view.
    - **List**. Selects the list view.
    - **Folder view**. Opens or closes the folder view.
    - **Mini calendar**. Opens or closes the mini calendar.
    - If the list view is selected and **checkboxes** are enabled, checkboxes for marking objects are displayed in the list.
    - **Print**. Opens the print preview for printing a calendar sheet.

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

- **Edit**. Edits an appointment's data.
- **Change status**. Changes the status of the appointment confirmation.
- **Delete**. Deletes the appointments selected by you.
- **More actions** icon ☰. Opens a menu with further functions.

General description of the user interface:

Related topics:

7.1.2   The mini calendar

Displays a clear overview of a month, year or several years above the folder view.

In order to display the mini calendar, click on **View** in the toolbar. Enable **Folder view** and **Mini calendar**.

Content

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

- If a time range of 12 months is displayed:
  - The header contains the start and end of the time range.
  - The years within the time range are displayed.
  - If clicking on a year, the name of the months of the year are displayed.

Related topics:

7.1.3   The Calendar folder view

Displays the calendars.

In order to display the folder view, click on **View** in the toolbar. Enable **Folder view**.

Content

- **My calendars**. Contains your personal calendars.
- **Add new calendar**. Opens a menu with functions for creating, subscribing to or importing calendars.
- **Public calendars**. Contains calendars shared with all users.
  The **All my public appointments** calendar contains the public appointments you participate in.
- **Shared calendars**. Contains calendars shared with you by other users.
  If the shared calendar comes from another groupware installation, the user name will be appended with the name of the other domain.

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

General description of the user interface:

The folder view (p. 27)

Related topics:

Viewing Appointments (p. 148)
Adding Calendars (p. 168)
Using calendar colors (p. 175)
Subscribing to public and shared calendars (p. 171)
Managing Data with Folders (p. 238)
Sharing Data (p. 245)

7.1.4   The Calendar display area

Either includes a calendar view or a list view of the appointments. In order to select a view, click on **View** in the toolbar.

General description of the user interface:

The display area (p. 28)

Related topics:

Day, Work week, Week, Month or Year calendar view. (p. 140)
The Calendar list (p. 142)
The Calendar detail view (p. 144)

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

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

In order to display the calendar view, click on **View** in the toolbar. Enable one of the following settings: **Day**, **Work week**, **Week**, **Month** or **Year**.

Contents of the **Day** view

- **Previous day** ‹, **Next day** icon ›
- Day of the week, date, calendar week. Clicking on it opens the date picker.
- **Split** button. Displays the calendars selected in the folder view, in separate columns.
- The red line in the calendar sheet displays the current time.
- On the left side of the calendar sheet, the timezone is displayed above the dates.
  To add a further column with dates in another timezone, click on the timezone.
- If there are further appointments above or below the visible calendar sheet, arrows are displayed at the top or the bottom of the calendar sheet.

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

- **Last week** ‹, **Next week** icon ›
- Month, year, calendar week. Clicking on it opens the date picker.
- Days of the week. The current weekday is highlighted in red.
  In the calendar settings, you can define the number of days for a work week and the first day of a work week.
- If clicking on a weekday, the window for creating a new whole day appointment opens.
- The red line in the calendar sheet displays the current time.
- On the left side of the calendar sheet, the timezone is displayed above the dates.
  To add a further column with dates in another timezone, click on the timezone.
- If there are further appointments above or below the visible calendar sheet, arrows are displayed at the top or the bottom of the calendar sheet for the respective day.

Contents of the **Month** view

- **Previous month** ‹, **Next month** icon ›
- days of the week, name of the month, year
- The calendar weeks are displayed on the left side of the calendar sheets.

Contents of the **Year** view

- **Previous year** ‹, **Next year** icon ›
- Year. If clicking on it, a window for selecting a year opens.
  The calendar sheet shows an overview of a year's days and months.
- If clicking on a month, the calendar is opened in the month view

Related topics:

7.1.6   The date picker

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

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

- Click on the date on the upper left side of the **Day**, **Workweek** or **Week** calendar view.
  The date picker is only displayed if the mini calendar is hidden. In order to hide the mini calendar, click on **View** in the toolbar. Disable **Mini calendar**.
- Click on a date input field in the appointment editing window.
- Click on the date on the upper left side of the scheduling view.

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

Content

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

Related topics:

7.1.7   The Calendar pop-up

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

Content

- **Accept**, **Decline**, **Change status**, **Edit**, **Follow-up**, **Delete** buttons.
  Note: Depending on the configuration, the following limitations might prevail:
  - Some buttons for appointments in your private calendars are only displayed if you have the respective permissions for executing the function.
  - If you are a participant, you can not change or delete the appointment.
  - If you are the organizer, you can not change your status.
- If clicking the **More actions** icon ☰, a menu with further functions opens.
- Appointment data:
  - Subject
  - date, time, time zone
  - for recurring appointments: the recurrence type
  - appointment location, if entered
- For conferences: a button to join the conference
- Further appointment data, if set:
  - definition
  - Attachments
  - organizer, additional recipients, resources, external participants
    If clicking on a name, a pop-up opens. It displays the participant's **Halo View**.
    Depending on the number of participants, the number of participants that accepted, declined or have not replied yet are shown on the top right side above the list of participants. In order to filter the list of participants, click the icons.
- If clicking on **Details**, further information will be displayed:
  - the appointment's organizer
  - the calendar with the appointment
  - the creator's name
  - the name of the last editor

General description of the user interface:

The pop-up (p. 29)

Related topics:

7.1.8   The Calendar list

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

In order to display the list view, click on **View** in the toolbar. Enable **List**.

Content

- Each day with appointments shows a header with the date.
- The following details are displayed for each appointment: date, time, color, private appointment icon, subject and location.

Related topics:

7.1.9   The Calendar detail view

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

In order to display the detail view, click on **View** in the toolbar. Enable **List**.

Content

- Subject
- date, time, time zone
- for recurring appointments: the recurrence type
- appointment location, if entered
- If the appointment is a conference: a button to join the conference
- Further appointment data, if set:
  - definition
  - attachments
  - organizer, additional recipients, resources, external participants
    If clicking on a name, a pop-up opens. It displays the participant's **Halo View**.
- If clicking on **Details**, further information will be displayed:
  - the appointment's organizer
  - the calendar with the appointment
  - the creator's name
  - the name of the last editor

Related topics:

7.1.10 The scheduling view

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

In order to display the scheduling view, do one of the following:
- Click on **Scheduling** in the toolbar.
- Click on **Find a free time** in the appointment editing window.

Content

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

Related topics:

7.1.11 The appointment editing window

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

In order to open the window, do one of the following:
- Select **New appointment** from the toolbar.
- Select an appointment in the list view. Click on **Edit** in the toolbar.
- Click on an appointment in a calendar view. Click on **Edit** in the pop-up.

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

General description of the user interface:

The editing window (p. 31)

Related topics:

7.2   Viewing Appointments

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

- Displaying appointments in different views (p. 149)
- Displaying multiple time zones (p. 150)
- How are appointments displayed in a calendar view? (p. 151)

User interface:

The Calendar folder view (p. 139)
The Calendar display area (p. 139)

7.2.1   Displaying appointments in different views

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

How to view an appointment:

1. Select a calendar in the folder view. Make sure the checkbox next to the calendar is enabled.

2. Click on **View** in the toolbar. Select one of the following entries: **Day**, **Work week**, **Week**, **Month**, **List**.

3. If you have selected a calendar view:
   - In order to browse the calendar, use the navigation bar on top of the calendar sheet.
     In order to display the time frame with the current day, click on **Today** in the toolbar.
   - Click on an appointment in the calendar sheet. The calendar's data is displayed in the pop-up.

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

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

User interface:

Related topics:

7.2.2   Displaying multiple time zones

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

How to display multiple time zones in a calendar view:

1. Click on **View** in the toolbar. Select one of the following entries: **Day**, **Work week** or **Week**.

2. Click on the **Timezone** button ▼ on the upper left side of the calendar sheet.
   A menu opens. Enable a timezone in the menu below **Favorites**.
   By clicking on **Manage favorites** you can add/remove timezones to/from favorites.

User interface:

Day, Work week, Week, Month or Year calendar view. (p. 140)

Related topics:

Displaying appointments in different views (p. 149)
Managing favorite timezones (p. 175)
Customizing the Basic Settings (p. 38)

7.2.3   How are appointments displayed in a calendar view?

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

- Your availability displayed during the appointment duration: Reserved, Free
- Your confirmation status: Accepted, Tentative, Declined
- Visibility of the appointment in shared calendars for users who are no participants: Standard, Private, Secret
- If there is enough space, icons for the following appointments are displayed in the Day, Workweek and Week calendar view: recurring appointment, appointment with participants, private appointment, secret appointment, tentative appointment

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

Display of appointments that are visible to all

Depending on the displayed availability, public appointments are displayed in the following colors and patterns:

- Free: Selected color with broad diagonal stripes
- Booked: Selected color

If you do not select a color, the color of the calendar is used. Depending on the confirmation status, public appointments are displayed as follows:

- Accepted appointments are displayed in the color and pattern of the availability.
- Tentatively accepted appointments are displayed with question marks.
- Declined appointments are displayed in light gray with crossed subject.
  Tip: In the calendar settings, you can define whether declined appointments will be displayed.

Note: In public or shared calendars you will only see the colors of appointments that have been created by you.

Private or secret appointments display

Private and secret appointments are displayed as follows:

- Private appointments are displayed in gray and are marked with the **Private** icon 🔒.
  Users that are no participants can only view the appointment date in shared calendars.
- Secret appointments are displayed in gray and are marked with the **Private** icon 🔒.
  Users that are no participants can not view the appointment in shared calendars. Secret appointments are not considered for the conflict handling. Secret appointments are not displayed in the scheduling view.

Related topics:

7.3 Viewing or Saving Appointment Attachments

Learn how to view, read or download task attachments.

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

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

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

How to use the appointment attachment functions:

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

2. Click on the function wanted.

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

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

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

Related topics:

Displaying appointments in different views (p. 149)

The Calendar list (p. 142)
The Calendar detail view (p. 144)
Day, Work week, Week, Month or Year calendar view. (p. 140)
The Calendar pop-up (p. 142)

7.4   Creating Appointments

Learn how to create an appointment and about the functions available for defining the appointment data:

Notes:

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

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

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

User interface:

Related topics:

7.4.1   Creating new appointments

How to create a new appointment:

1. In the folder view, open a calendar for which you have the permission to create objects.

2. Select **New appointment** from the toolbar.
    If selecting a shared calendar, you are asked where to create the appointment:
    - If you create the appointment on behalf of the owner, the appointment is created in the owner's shared calendar.
    - If you invite the owner to the appointment, the appointment is saved in your calendar.

3. Enter a subject.

4. To set an appointment's start and end time, use the following options below **Start date** and **Ends on**.
    - Click on a date. Enter a date or select a date in the date picker.
      For all day appointments, activate **All day**.
    - Click on a time. Enter the time or select a time from the list.
    - You can set the timezone for the start or end time by clicking on the timezone button next to a time. You can set different timezones for the start and end time.

5. You can enter a location and a description.
    If you want to create the appointment in another calendar, click on the calendar name below **Calendar**. Select a calendar.

6. Click on **Create**.

Options:
- To create an appointment, double-click in the calendar sheet on a free area or drag open an area ranging from the beginning to the end of the new appointment.
- In order to create an all day appointment, select the **Work week** or **Week** calendar view. Click on a day above the calendar sheet.

Example: How can I organize another person's appointments as a deputy?
- Ask the other person to share a calendar folder with write permissions.
- Enter this person's appointments in this folder. The other person will be displayed as the organizer of the appointments.

User interface:

The appointment editing window (p. 146)

Subordinated actions:

Using the date picker (p. 155)
Setting recurring appointments (p. 157)
Scheduling audio/video conferences (p. 156)
Setting an appointment's display (p. 158)
Using appointment reminders (p. 158)
Adding participants or resources (p. 159)
add attachments (p. 159)

Related topics:

7.4.2   Using the date picker

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

How to use the date picker in the editing window:

1. Click on the date field below **Starts on** or **Ends on**. The date picker opens.

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

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

User interface:

Superordinate actions:

7.4.3   Scheduling audio/video conferences

Prerequisite: You have set up an account with an audio or video conference provider, e.g. Zoom.

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

1. Click on the **Conference** field. The available providers will be displayed. Select a provider.

   A link will be displayed that can be used by the participants to join the conference. To enable participants to take part in the conference by phone, a dial-in number will be displayed.

2. You can copy the link or dial-in number in order to be found more easily by the participants:
   - To copy the link to the **Location** field, click on **Copy to location field**.
   - To copy the link to the clipboard, click on **Copy to clipboard**.
   - To copy the dial-in numbers to the appointment description, click on **Copy dial-in numbers to description**.

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

Superordinated action:

Related topics:

7.4.4   Setting recurring appointments

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

1. Enable **Repeat**. The current repetition parameters are displayed.

2. To set the repetition parameters, click on the value.

3. Change the recurrence parameters in the *Edit recurrence* window:
    - In **Repeat**, you can set the interval between the appointments.
    - Below the interval, you can set the interval parameters.
    - In **Ends**, you can define when the recurring appointment ends.

    Click on **Apply**.

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

Superordinated action:

Creating new appointments (p. 154)
Editing Appointments (p. 165)

Related topics:

Creating recurring task (p. 195)

7.4.5   Setting an appointment's display

The following options exist:

- display the appointment as free
- select an appointment color
- define the visibility in shared calendars

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

1. If there should be no conflict with overlapping appointments, enable **Show as free**.

2. In order to set an individual color for the appointment, click on **Appointment color**. Select a color field. If clicking on **Use calendar color**, the appointment gets the color if its calendar.

3. In a shared calendar, you can use **Visibility** to define the calendar's visibility for other users who are no participants.

   - In the default setting **Standard**, the appointment is visible to all users who have the permission to see the calendar.

   - If only the appointment date should be visible for other users but not the subject or other appointment data, select **Private**. Private appointments are marked with the **Private** icon 🔒.

   - If the appointment is to be invisible for other users, select **Secret** from the drop-down. Private appointments are marked with the **Private** icon 🔒.
   Secret appointments do not conflict with other appointments. The are no displayed in the scheduling view.

Superordinated action:

7.4.6   Using appointment reminders

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

- an appointment reminder in the notification area
- an appointment reminder by email

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

1. Click on the current setting below **Reminder**. The *Edit reminders* window opens. It shows the current reminder.

2. To change the current reminder, select the reminder type. Select a time for the reminder. Define the benchmark for the time.

3. In order to add another reminder, click on **Add new Reminder**.

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

4. Click on **Apply**.

Superordinated action:

Related topics:

7.4.7   Adding participants or resources

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

1. In the input field below **Participants**, enter: the email addresses of the participant, the name of a group, distribution list or resource.
   - While entering the recipients, matching suggestions will be displayed. To accept a suggestion, click on it.
   - To select contacts from an address book, click the **Select contact** icon ⬇ on the right side of the input field.

2. Depending on the configuration, you can define that participants can edit the appointment later. To do so, enable the **Participants can make changes** checkbox. Please note the following:
   - This option is not available for appointments in public folders or for appointments with external participants.
   - The checkbox is only available for the appointment's organizer. Each change is done on the behalf of the organizer.
   - Participants can add other participants but not remove participants. Participants can not remove themselves from the appointment.

3. To remove participants or resources, click the **Remove** icon 🗑.

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

Result:
- Each participant receives an appointment invitation.
- If participants accept the appointment, the appointment will be entered in their calendar.
- If external participants accept the appointment, you will receive an email. In this email, you have to accept the appointment change so that the external participant will be entered in your appointment.

Tip: To find free appointments of all participants and resources you can use the schedule view.

Superordinate actions:

Creating new appointments (p. 154)
Editing Appointments (p. 165)

Subordinated actions:

Automatically adding email addresses from an address book (p. 113)
Automatically adding email addresses from the address list (p. 114)

7.4.8   add attachments

How to add attachments in the appointment editing window:

1. Click on **Add attachments** below **Attachments**.

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

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

Superordinated action:

Creating new appointments (p. 154)

7.4.9   Using the scheduling view

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

How to use the scheduling view for creating appointments:

1. You have the following possibilities to open the scheduling view:
   - To use the scheduling view before creating a new appointment, click on **Scheduling** in the toolbar. The *Scheduling* page opens.
   - To use the scheduling view while creating a new appointment or editing an existing appointment, click on **Find a free time** in the appointment editing window. The *Scheduling* window opens.

2. Enter the name of a participant or resource in **Add participant**.
   - While entering the recipients, matching suggestions will be displayed. To accept a suggestion, click on it.
   - To select contacts from an address book, click the **Select contact** icon on the right side of the input field.

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

   You can save the participants as distribution list. To do so, select **Save as distribution list** below the list.

3. Search for a free time in the calendar. Use the following methods:
   - To set a time range, click on the date on the upper left side. You can also use the browse icons
   - To set the display size of the calendar sheet, use the control elements on the upper right side.
   - To set the **Week** or **Month** date range, enable the respective entries in the **Options** drop-down.
   - Use the **Options** menu to adjust the view in the calendar sheet.
   - To adjust the visible part of the time range, use the scrollbar below the calendar sheet.

4. Define the appointment's start and end by using one of the following options:
   - In the calendar sheet drag open an area ranging from the beginning to the end of the new appointment.
     If pressing the [Alt] key before releasing the mouse button, the appointment's start and end date are entered on the appointment editing page.
   - To set the appointment's duration to one hour, click on the wanted time.

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

5. Complete the details for creating or editing the appointment.

User interface:

   The scheduling view (p. 145)

Subordinated actions:

   Automatically adding email addresses from an address book (p. 113)
   Automatically adding email addresses from the address list (p. 114)

Related topics:

   Creating new appointments (p. 154)
   invite participants to a new appointment (p. 161)
   Resolving appointment conflicts (p. 163)

7.4.10   Creating a follow-up appointment

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

How to create a follow-up appointment:

1. Depending on the view, you have the following possibilities:
   - Click on an appointment in a calendar view. In the pop-up, click on **Follow-up**.
   - Select an appointment in the list view. Click on **Follow-up** in the toolbar.

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

User interface:

Related topics:

7.4.11 invite participants to a new appointment

If an appointment has several participants, you can invite those participants to a new appointment.

How to invite participants to a new appointment:

1. Depending on the view, you have the following possibilities:
   - In a calendar view, click on an appointment with multiple participants. Click the **More actions** icon ≡ in the pop-up.
   - In the list view, select an appointment with multiple participants. Click the **More actions** icon ≡ in the toolbar.

   Click on **Invite to new appointment**.

2. Complete the details for creating an appointment.

Related topics:

7.4.12 Inviting email recipients to new appointments

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

How to invite all email recipients to an appointment:

1. Select an email in the Email app.

2. Click the **More actions** icon ☰ in the detail view.
   Click on **Invite to appointment**.

3. Complete the details for creating an appointment.

Related topics:

7.4.13 Creating appointments from iCal attachments

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

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

1. Select an email with an iCal attachment in the Email application.

2. Click on an attachment's name in the detail view. Click on **Add to calendar**.

Related topics:

7.4.14 Resolving appointment conflicts

An appointment conflict happens if the following is true:

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

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

How to resolve appointment conflicts:

1. To show or hide details, you can click on an appointment on the *Conflicts detected* page.

2. Use one of the following methods:
   - To create the appointment despite the conflict, click on **Ignore conflicts**.
   - To resolve the conflict, click on **Cancel**. Change the appointment's times or enable **Show as free**.

Related topics:

7.5   Responding to Appointment Invitations

Learn how to respond to an appointment invitation if a user or external partner adds you as participant to an appointment.

You will receive at least one of the following notifications:

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

You can accept, tentatively accept or decline your participation in the appointment. You can always change your confirmation status later.

How to answer an appointment invitation in the notification area:

1. In the menu bar, click the **Notifications** icon ▣. The Notification area is displayed.

2. To display the suggested appointment in the calendar, click on **Open in calendar**.

    To answer the appointment invitation, click on **Accept/Decline** below the invitation.

3. Enter a comment in the *Change confirmation status* window. Click on one of the buttons **Decline**, **Tentative** or **Accept**.

Result: If you accept the appointment, it will be entered in your calendar.

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

How to answer an appointment invitation in an email invitation:

1. Open an email with an appointment invitation in the Email application.

2. Enter a comment below **This email contains an appointment** in the detail view. Click on one of the buttons **Accept**, **Tentative** or **Decline**.

Result: If you accept the appointment, it will be entered in your calendar.

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

User interface:

The notification area (p. 30)

Related topics:

change the appointment status (p. 173)
Calendar Settings (p. 183)

7.6   Editing Appointments

Learn how to edit an appointment's data or time later.

The following options exist:
- You can edit all appointment data in the appointment's editing window.
- You can also change the appointment's time or duration in a calendar view:
  - move an appointment to another day
  - change an appointment's time or duration

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

Notes:
- Depending on the configuration, you can only edit an appointment in your private calendars if you are the appointment's organizer.
- Appointments in calendar subscriptions can not be edited.

How to edit an appointment in the appointment's editing window:

1. Depending on the view, you have the following possibilities:
   - Click on an appointment in a calendar view. Click on **Edit** in the pop-up.
   - Select an appointment in the list view. Click on **Edit** in the toolbar.
     You can also double-click on an appointment in the list view. The appointment will be displayed in a window. Click on **Edit**.

   When having selected a recurring appointment, you are asked to which appointments of the series the changes should be applied:
   - When having selected the first appointment of the series, you can either only change the first appointment or the complete series.
   - For all other appointments within the series, you can either only change the selected appointment or the selected appointment and all future appointments of the series.

   The appointment's data is displayed.
2. Edit the data.
3. Click on **Save**.

How to move an appointment to another day:

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

How to change an appointment's time or duration:

1. Select one of the following views: **Day**, **Work week** or **Week**.
2. Use one of the following methods:
   - Drag the appointment to another time.
   - Drag the start or end time to another time.

User interface:

The appointment editing window (p. 146)

Related topics:

Creating new appointments (p. 154)
Scheduling audio/video conferences (p. 156)
Managing Appointments (p. 172)

7.7   Calling Appointment Participants

Learn how to call an appointment participant by contacting the appointment participant via audio or video conference or phone.

Prerequisite:
- You have set up an account with an audio or video conference provider, e.g. Zoom.
- Your computer has been configured to allow you to make phone calls over the Internet.

How to call an appointment's participants:

1. Depending on the view, you have the following possibilities:
    - Click on an appointment in a calendar view. A pop-up opens.
    - Select an appointment in the list view. Click on a participant in the detail view. A pop-up opens.

    An icon below the name indicates the participant's presence status.

2. Click the **Call** icon 📞. Use one of the following methods:
    - In the menu, click on an audio or video conference provider, e.g. Zoom. The window for calling the contact opens. Click on **Call**.
    - Select a phone number from the menu.

User interface:

Related topics:

7.8   Adding Calendars

With calendars you can organize your appointments e.g. by separately saving your business and private appointments. Learn how to create calendars, use appointments from external calendars and set the view for shared calendars.

The following options exist:

- Adding personal calendars (p. 169)
- Subscribing to external calendars (p. 170)
- Importing calendars from files (p. 171)
- Subscribing to public and shared calendars (p. 171)

User interface:

The Calendar folder view (p. 139)

Related topics:

Managing Appointments (p. 172)
Managing Data with Folders (p. 238)

7.8.1   Adding personal calendars

You can create additional personal calendars below My calendars.

How to create a new personal calendar:

1. Click on **Add new calendar** in the folder view. A menu opens.
   Click the **Personal calendar**.
   A window opens.

2. Enter a name. In case the new calendar should be a public calendar, enable **Add as public calendar**.
   Click on **Add**.

Related topics:

7.8.2   Subscribing to external calendars

You can import appointments from external calendars into groupware calendars by subscribing to the external calendar. You can subscribe to the following calendars:

- Calendars that are publicly available on the Internet. Those are e.g., calendars with international public holidays, sport events, media events or stock exchanges.

- Your Google calendar

- iCal calendars that are publicly available on the Internet. To do so, you need to know the calendar's url.

Notes:

- Appointment changes in external calendars will be automatically synced to the calendar subscription after a short time.

- You can not create or edit appointments in subscribed calendars.

How to subscribe to external calendars:

1. Click on **Add new calendar** in the folder view. A menu opens.

2. You have the following options:

   - To subscribe to a public calendar, click on **Browse calendars of interest**. The *Add calendar* window opens.
     Note: Depending on the configuration, this function might not be available.
     Select the language and country of the calendar that you want to subscribe to.
     Select one or several calendars. Click on **Save**.

   - To subscribe to your Google calendar, click on **Google calendar**. A new browser window opens. Grant access to your Google calendar.
     The appointments will be imported to a new calendar. As soon as the import has been completed, the *Subscribe calendar* window will be closed.

   - To subscribe to an iCal calendar, click on **Subscribe via URL (iCal)**. The *Subscribe to iCal feed* window opens.
     Enter an iCal url. Click on **Subscribe**.

Options:

- The reminder that is set as default in the calendar settings is applied to all appointments of a public calendar or an iCal calendar.
  In order to change this reminder for each appointment in this calendar, click the **Actions** icon ▤ next to the calendar. Click on **Change reminders**.
  To change an appointment's reminder, use the appointment's detail view or pop-up
  Note: Those functions are not available for Google calendars you subscribed to.

- In order to refresh the data you have subscribed to, click the **Actions** icon ▤ next to the calendar. Click on **Refresh this calendar**.

Related topics:

7.8.3   Importing calendars from files

You can import calendars that have been created from within other applications. The calendar you want to import needs to be available as iCal file.

How to import calendars from a file:

1. Click on **Add new calendar** in the folder view. A menu opens.

    Click on **Upload file**. The *Import from file* window opens.

2. Click on **Upload file**. Select a file.

3. Enter a name for the new calendar. Click on **Import**.

Result: A new calendar will be added.

Note: All participants of the imported appointments will be removed. Instead, you will be added as participant.

Related topics:

7.8.4   Subscribing to public and shared calendars

Calendars that are public or shared by other users can be used as follows:

- You can define which public and shared groupware calendars are displayed in the folder view by subscribing to such calendars.
  This helps you to keep a better overview if there are many public and shared calendars in your groupware environment.
- If you have subscribed to such a calendar, you can set whether this calendar will be synchronized with other clients, e.g. with your smartphone.
- If you no longer need such a calendar, you can cancel the subscription.

How to define the calendars to which you want to subscribe and which are to be synchronized:

1. In the folder view, click on **Add new calendar**. A menu opens.

    Click on **Subscribe shared Calendar**.

    You can also use the **Subscribe shared Calendar** button in the email settings.

    A window opens. It shows your private, the public and shared calendars.

2. If you want a calendar to be displayed, enable the **Subscribe to calendar** button ⬭.

    To define that a displayed calendar is synchronized, enable the **Synchronize via DAV** checkbox.

    If you no longer want a calendar to be displayed and synchronized, disable the **Subscribe to calendar** button ⬤.

User interface:

Related topics:

7.9   Managing Appointments

Learn how to organize your appointments and about the appointment actions available.

- change the appointment status (p. 173)
- Changing appointment reminders (p. 174)
- Changing the organizer (p. 174)
- Managing favorite timezones (p. 175)
- Using calendar colors (p. 175)
- Moving appointments to another calendar (p. 175)
- Importing appointments (p. 176)
- Exporting appointments (p. 176)
- Printing appointments (p. 177)
- Deleting appointments (p. 178)

User interface:

The Calendar toolbar (p. 137)
Day, Work week, Week, Month or Year calendar view. (p. 140)
The Calendar pop-up (p. 142)
The Calendar detail view (p. 144)

Related topics:

Editing Appointments (p. 165)
Adding Calendars (p. 168)

Creating, Editing or Managing Appointments as Deputy (p. 180)

7.9.1   change the appointment status

You can change your appointment status at a later point of time. There are the following options:

- You can accept or decline the appointment without comment.
- You can change your confirmation status. You can add a comment that is visible to other participants.

Notes:

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

How to accept or decline an appointment:

1. Depending on the view, you have the following possibilities:
   - Click on an appointment in a calendar view. A pop-up opens.
   - Select an appointment in the list view. The appointment will be displayed in the detail view.

2. Click on **Accept** or on **Decline**.

   When having selected a recurring appointment, set whether the changes should be applied to the single occurrence to for the complete series.

How to change your confirmation status:

1. Depending on the view, you have the following possibilities:
   - Click on an appointment in a calendar view. In the pop-up, click on **Change status**.
   - Select an appointment in the list view. Double-click on the appointment. Click on **Change status** in the toolbar.

   When having selected a recurring appointment, set whether the changes should be applied to the single occurrence to for the complete series.

2. You can enter a comment in the *Change confirmation status* window. Click on one of the buttons **Decline**, **Tentative** or **Accept**.

Related topics:

Responding to Appointment Invitations (p. 164)

7.9.2   Changing appointment reminders

You can change your appointment reminder later by adjusting or removing a reminder or by adding another reminder.

Note: This function is only available if you do not have full edit permissions for the appointment. Otherwise you can use the appointment editing window to change the appointment reminder.

How to change an appointment reminder:

1. Depending on the view, you have the following possibilities:
    - Click on an appointment in a calendar view. Click the **More actions** icon ≡ in the pop-up.
    - Select an appointment in the list view. Click the **More actions** icon ≡ in the toolbar.

2. Click on **Change reminders**. The *Change reminders* window opens.

3. Click on a reminder. The *Edit reminders* window opens.
    You can edit or delete a reminder or add a new one.

Related topics:

Using appointment reminders (p. 158)
Editing Appointments (p. 165)

7.9.3   Changing the organizer

If you are the organizer of an appointment or a recurring appointment with at least two participants, you can change the organizer. You can not change the organizer for the following appointments:
- an appointment with external participants
- an individually changed appointment within a series

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

How to change an appointment's organizer:

1. Depending on the view, you have the following possibilities:
    - Click on an appointment in a calendar view.
      Click the **More actions** icon ≡ in the pop-up.
    - Select an appointment or multiple appointments in the list view.
      Click the **More actions** icon ≡ in the toolbar.
    Click on **Change organizer**.

2. When having selected a recurring appointment, set whether the changes should be applied to the single occurrence to for the complete series.

3. Enter the new organizer's email address in the *Change organizer* window.
    Note: External participants can not be set as organizer.

7.9.4   Managing favorite timezones

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

How to mark a timezone as favorite:

1. Click the **Settings** icon ⚙ on the right side of the menu bar. Click on **Settings**.

2. Click on **Calendar** in the sidebar. Click on **Favorite timezones**.

3. Click on **Add timezone** in the display area. The *Select favorite timezone* window opens.

4. Select a timezone from the list. Click on **Add**.

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

Related topics:

> The appointment editing window (p. 146)
> Displaying multiple time zones (p. 150)

7.9.5   Using calendar colors

You can assign a color to a calendar. All appointments in this calendar will then be displayed in the color of the calendar. If you assign an individual color to an appointment when creating or editing it, the appointment will be displayed in the color assigned, not in the color of the calendar.

How to select a calendar color:

1. Click the **Actions** icon ▤ next to the calendar name in the folder view.

2. Select a color from the color selection drop down.

Related topics:

> How are appointments displayed in a calendar view? (p. 151)
> The Calendar folder view (p. 139)

7.9.6   Moving appointments to another calendar

You can move appointments to another calendar.

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

How to move appointments to another calendar:

1. Depending on the view, you have the following possibilities:
    - Click on an appointment in a calendar view. Click the **More actions** icon ☰ in the pop-up.
    - Select an appointment or multiple appointments in the list view. Click the **More actions** icon ☰ in the toolbar.

2. Click on **Move**.

    Select a calendar in the *Move* window. You can create a new calendar by clicking on **Create folder**.

3. Click on **Move**.

Related topics:

> Adding personal calendars (p. 169)

7.9.7   Importing appointments

You can import appointments from files in iCal format.

How to import appointments from an iCal file:

1. Select the calendar for importing the appointments to in the folder view.

2. Click the **Actions** icon ▤ next to the calendar. Click on **Import**.

3. In the *Import from file* window, click on **Upload file**. Select a file in iCal format.

    To also import appointments that have the same id as already existing appointments, enable **Ignore existing appointments**.

4. Click on **Import**.

Result: The contacts are added to the calendar.

Note: All participants of the imported appointments will be removed. Instead, you will be added as participant.

Related topics:

Exporting appointments (p. 176)
Creating Appointments (p. 153)
Importing calendars from files (p. 171)

7.9.8   Exporting appointments

You can export appointments in the iCalendar format. You can e.g. use this format to exchange appointments with other calendar applications. You can export single appointments or all appointments from a calendar.

How to export single appointments:

1. Depending on the view, you have the following possibilities:

    ▪ Click on an appointment in a calendar view.
       Click the **More actions** icon ≡ in the pop-up.

    ▪ Select an appointment or multiple appointments in the list view.
       Click the **More actions** icon ≡ in the toolbar.

2. Click on **Export**. A window opens.

    Select the function for saving the export file.

How to export all appointments from a calendar:

1. Select a personal or public calendar in the folder view.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Export**. A window opens.

3. Select the function for saving the export file.

Related topics:

Importing appointments (p. 176)
Downloading Personal Data (p. 264)

7.9.9   Printing appointments

To print calendars and appointments you can:
- print a calendar sheet with appointments
- print appointment data
- print a detailed or compact list of appointments

How to print a calendar sheet with appointments:

1. Click on **View** in the toolbar. Select one of the following entries: **Day**, **Work week**, **Week** or **Month**.

2. Open a calendar in the folder view.

3. Click on **View** in the toolbar. Click on **Print**. A window with a print preview opens.

4. If required, change the printer settings. Click on the **Print** button.

5. Close the print preview window.

How to print an appointment's data:

1. Depending on the view, you have the following possibilities:
   - Click on an appointment in a calendar view. Click the **More actions** icon ≡ in the pop-up.
   - Select an appointment or multiple appointments in the list view. Click the **More actions** icon ≡ in the toolbar.

   Click on **Print**. A window with a print preview opens.

2. If required, change the printer settings. Click on the **Print** button.

3. Close the print preview window.

How to print a list of appointments:

1. Click on **View** in the toolbar. Select **List**.

2. Select the appointments to be printed.

3. Click the **More actions** icon ≡ in the toolbar. Click on **Print**. A window opens. You are asked how you want to print the appointments.
   - To print a list with detailed appointment data, click on **Detailed**.
   - To print a compact list, click on **Compact**.

4. If required, change the printer settings. Click on the **Print** button.

5. Close the print preview window.

7.9.10 Deleting appointments

Warning: If you delete an appointment it will be irrevocably lost. Depending on the configuration, you can only delete an appointment in your private calendars if you are the appointment's organizer.

How to delete appointments:

1. Depending on the view, you have the following possibilities:
   - Click on an appointment in a calendar view. In the pop-up, click on **Delete**.
   - Select an appointment or multiple appointments in the list view. Click on **Delete** in the toolbar.

2. Confirm that you want to delete the appointment.

Options:
- When having selected a recurring appointment, you are asked which appointments of the series are to be deleted:
  - When having selected the first appointment of the series, you can either only delete the first appointment or the complete series.
  - When having selected an appointment within the series, you can either only delete the selected appointment or the selected appointment and all future appointments of the series.
  - When having selected the last appointment of the series, you can only delete the last appointment. In the latter case, you are not asked to appointments are to be deleted.
- If you are the appointment's organizer, you can inform other participants about the reason for the deletion by entering a message. The input field is shown if the following conditions are met:
  - The appointment has at least two participants.
  - **Receive notification for appointment changes** is enabled In the calendar settings.
  The message will be sent as email.

7.10   Searching for Appointments

Learn how to search for appointments by using the following search criteria:

▪ search terms for subject, description, location, attachments' names, participants
▪ calendars that are to be searched
▪ your confirmation status
▪ time frame of the appointment creation, related to the current date: one month, three months, one year
▪ type: all, series, single appointment

How to search for appointments:

1. Click on the **Search** input field. Enter a search term in the input field.
   The search menu opens.

2. Define the data sources to be searched by clicking on an entry in the search menu.
   ▪ If clicking on the search term or pressing enter, the following data sources are searched: subject, description
   ▪ In order to only search in the subject, click on **in subject** in the search menu.
     Accordingly, you can limit the search to the description, location or the attachment's name.
   ▪ In order to search for appointments with a specific participant, click on a name in the search menu.
   The search results are displayed in the list that is shown in the display area.

3. To limit the search to specific appointments, click the **Options** icon ▼ in the search field. Use the following methods:
   ▪ **Folders** allows to define the calendars to be searched.
     If you select **All folders**, all private, public, and shared calendars are searched.
   ▪ **Status** allows to search for appointments with a specific confirmation status.
   ▪ **Range** allows to search for appointments within a specific time interval.
   ▪ **Type** allows to limit the search to appointments or recurring appointments.
   ▪ **Folder type** allows to limit the search to private, public or shared appointments.

4. To refine the search result, enter further search terms: To remove a search term, click the **Remove** icon ✖ next to the search term.

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

User interface:

The search bar (p. 25)

Related topics:

Displaying appointments in different views (p. 149)

7.11 Creating, Editing or Managing Appointments as Deputy

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

- view appointments
- create new appointments on the user's behalf
- edit, manage or delete appointments on the user's behalf

How to create or edit appointments as deputy:

1. In the folder tree under **Shared calendars**, open the calendar of the user who appointed you as deputy.

2. Select **New appointment** from the toolbar.

   You will be asked whether you want to create the appointment as deputy of the shared calendar's owner. Click on **on behalf of the owner**.

The user will be informed by email that you created, edited or deleted an appointment on his behalf.

User interface:

The appointment editing window (p. 146)

Related topics:

Creating Appointments (p. 153)
Managing Appointments (p. 172)

Sending or Receiving Emails as Deputy (p. 95)
Appointing a Deputy (p. 257)

7.12   Managing Groups

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

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

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

How to create a new group:

1. Click the **Settings** icon ▣ on the right side of the menu bar. Click on **Settings**.
    In the sidebar, click on **Groups**.

2. In the display area, click on **Create new group**.

3. Enter a group name in the *Create new group* window. Add members. The members are displayed below
    Members
    In order to remove a member, click the **Remove member** icon ✖ next to the name.
    Click on **Create**.

How to edit a group:

1. Click the **Settings** icon ▣ on the right side of the menu bar. Click on **Settings**.
    In the sidebar, click on **Groups**.

2. Select a group in the display area. Click on **Edit**.

3. Edit the group's data in the *Edit group* window.
    Click on **Save**.

How to delete a group:

1. Click the **Settings** icon ▣ on the right side of the menu bar. Click on **Settings**.
    In the sidebar, click on **Groups**.

2. Select a group in the display area.

3. Click the **Delete** button.

Related topics:

Managing Resources (p. 182)

7.13   Managing Resources

Other than participant conflicts, resource conflicts can not be ignored when creating appointments. If creating appointments, resources that are already booked for other appointments can not be added. The following options exist:

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

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

How to create a new resource:

1. Click the **Settings** icon ✛ on the right side of the menu bar. Click on **Settings**.
In the sidebar, click on **Resources**.

2. In the display area, click on **Create new resource**.

3. Enter a resource name in the *Create new resource* window. You can enter a description.
Define an email address for the resource.
Click on **Create**.

How to edit a resource:

1. Click the **Settings** icon ✛ on the right side of the menu bar. Click on **Settings**.
In the sidebar, click on **Resources**.

2. Select a resource in the display area. Click on **Edit**.

3. Edit the resource's data in the *Edit resource* window.
Click on **Save**.

How to delete a resource:

1. Click the **Settings** icon ✛ on the right side of the menu bar. Click on **Settings**.
In the sidebar, click on **Resources**.

2. Select a resource in the display area.

3. Click the **Delete** button.

Related topics:

7.14   Calendar Settings

How to use the calendar settings:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. Click on **Calendar** in the sidebar.

Depending on the configuration, the following settings are available:

Buttons

▪ **Subscribe to iCal calendars**
See Subscribing to public and shared calendars (p. 171)

View

▪ **start of working time**
Defines the start of the working hours.

▪ **end of working time**
Defines the end of the working hours.

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

▪ **show declined appointments**
Defines whether appointments that you declined are displayed.

birthday calendar

▪ **Show birthday calendar**
Defines whether a birthday calendar is displayed in the folder view.

Workweek view

▪ **Week start**
Defines the beginning of a work week.

▪ **Workweek length**
Defines the number of days of a work week.

See Day, Work week, Week, Month or Year calendar view. (p. 140)

New appointment
Defines default settings for new appointments.

▪ Default reminder time when creating the following appointments:

  ▫ normal appointments or recurring appointments

  ▫ all day appointments

  ▫ birthday calendar appointments

  To change a setting, click on the current setting. Change the current reminder in the *Edit reminders* window.
  You can add further reminders.

▪ **Mark all day appointments as free**
Defines whether all day appointments are displayed as free per default.

▪ **Participants can edit appointments**
Defines whether participants by default get the permission to edit an appointment.

Email notifications
Specifies whether you will receive an email notification, if the following is true:

▪ **Receive notifications when an appointment in which you participate is created, modified or deleted**
An appointment in which you participate has been re-created, changed or deleted.

▪ **Receive notification as appointment creator when participants accept or decline**
A participant accepted or declined an appointment created by you.

- **Receive notification as appointment participant when other participants accept or decline**
  a participant accepted or declined an appointment in which you participate.
- **Automatically delete the invitation email after the appointment has been accepted or declined**
  Defines whether the email notification for an appointment invitation will be automatically deleted when accepting or declining the appointment. See Responding to Appointment Invitations (p. 164)

Reminders

- **Show reminders for past appointments**
  Defines whether appointment reminders are displayed for past appointments.

Related topics:

Editing Appointments (p. 165)

8   Tasks

Learn how to schedule, track and organize your tasks in the Tasks app.

How to start the Tasks app:

Click the **All Applications** icon ⊞ in the menu bar. Click on **Tasks** in the App Launcher.

Topics:

8.1   The Tasks Components

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

8.1.1   The Tasks toolbar

Contains functions for creating, editing and organizing tasks. Note: Some functions are only available if you opened a folder for which you have the appropriate permissions to create or edit objects.

Content

- **New task**. Creates a new task.
- **Edit**. Edits a task's data.
- **Due**. Changes a task's due date.
- **Done**. Marks a task as done.
- **Delete**. Deletes the tasks selected by you.
- **More actions** icon ☰. Opens a menu with further functions.
- **View**. Opens a menu with checkboxes for controlling the view.
    - **Folder view**. Opens or closes the folder view.
    - **Checkboxes**. Displays checkboxes in the list, for marking objects.

General description of the user interface:

Related topics:

8.1.2   The Tasks folder view

Displays the task folders.

In order to display the folder view, click on **View** in the toolbar. Enable **Folder view**.

Content

- **My tasks**. Contains your personal tasks.
- **Add new folder**. Opens a menu with functions for creating folders and for subscribing to shared folders.
- **Public tasks**. Contains tasks shared with all users.
- **Shared tasks**. Contains tasks shared with you by other users.

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

General description of the user interface:

Related topics:

8.1.3   The Tasks display area

Contains the tasks list and a task's detail view.

General description of the user interface:

Related topics:

8.1.4   The Tasks list

Displays a list of tasks in the folder selected.

Content

- The name of the selected folder.
  The number of tasks in this folder.
- The following details are displayed for each task: subject, status or due date, and the progress.

Related topics:

8.1.5   The Tasks detail view

Shows the data of the task that you selected in the list. If double-clicking on the task in the list, the data are displayed in a window.

Content

- Icon for the task's priority, if set.
  Subject
  Private tasks are marked with the **Private** icon 🔒.
- If set: due date, reminder date
- status and progress
- Further task data, if set:
  - Attachments
  - Definition
  - For recurring tasks: repetition parameters
  - The task's start date
  - Billing information
  - The names of the participants and the external participants
    If clicking on a name, a pop-up opens. It displays the participant's **Halo View**.

Related topics:

The Tasks display area (p. 188)
The Tasks list (p. 188)

Viewing Tasks (p. 191)
Viewing or Saving Task Attachments (p. 192)
Calling Task Participants (p. 198)

Displaying contacts in the halo view (p. 110)

8.1.6   The editing window

This window is used when creating a new task or editing an existing one.

In order to open the window, do one of the following:
- Click on **New task** in the toolbar.
- Select a task. Click on **Edit** in the toolbar.

Content
- Task data.
    - **Subject**, **Description** input fields. The subject is displayed as task title. A description can be entered optionally.
    - **Expand form**. Displays additional input fields.
    - **Start date** and **Due date**. Defines the start and the due date. Clicking on it opens the date picker. If **All day** is disabled, you can set start and due times.
    - **All day**. Defines whether the task is supposed to last whole days.
    - **Repeat**. Defines whether the task is to be repeated.
- **Reminder**. Defines when and how you will be reminded about the task's due date. You can also set a date and time for the reminder in **Reminder date**. In this case, **Manual input** will be preselected in the **Reminder** field.
- Task view
    - **Status**. Defines the task's status. You can also enter a percentage value for the task completion in **Progress**.
    - **Priority**. Defines the task's priority.
    - **Private**. Enable this checkbox if other users are not to see the task's subject and description.
- **Add contact** input field. Enter the names of the participants that are to take part in the task in this field. **Select contacts** icon . Opens a window for selecting contacts from a list.
- **Add attachments**. Adds files.
- **Show details**. Displays additional data fields where you can enter billing details like estimated efforts, actual efforts or billing information.

General description of the user interface:

The editing window (p. 31)

Related topics:

The date picker (p. 141)
Creating new tasks (p. 194)
Editing Tasks (p. 197)

8.2   Viewing Tasks

Learn how to display the tasks in a tasks folder in different ways:

How to display a task:

1. Open a task folder in the folder view.

2. Click on a task in the list. The task's data is displayed in the detail view.

Options:

▪   To sort the task list or to only display due tasks, click the **Sort** icon ⬇⬆ above the list.

▪   You can open the task in a window by double-clicking on the task in the list.

User interface:

Related topics:

8.3   Viewing or Saving Task Attachments

Learn how to view, read or download task attachments.

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

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

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

How to use the task attachment functions:

1. Select a task with an attachment.

2. Click on an attachment's name in the detail view. Click on the function wanted.

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

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

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

Related topics:

Viewing Tasks (p. 191)
The Tasks detail view (p. 189)
The Tasks list (p. 188)

8.4   Creating Tasks

Learn how to create a task and about the functions available for defining the task data:

- Creating new tasks (p. 194)
- Creating recurring task (p. 195)
- Adding participants to a task (p. 195)
- Adding attachments (p. 195)

User interface:

The Tasks toolbar (p. 187)

Related topics:

Importing tasks (p. 203)
Creating Appointments (p. 153)

8.4.1   Creating new tasks

How to create a new task:

1. In the folder view, open a task folder for which you have the permission to create objects.

2. Click on **New task** in the toolbar.

3. Enter a subject. Enter a description, if needed.

4. Click on **Create**.

Options:

▪ To view the complete form, click on **Expand form**. The following optional functions are available:

   ▫ Set the task's start and due date.

   ▫ To get an task reminder, select a setting in **Reminder**. The respective date and time are entered in **Reminder date**.
To use custom values, set them in **Reminder date**. In this case, **Manual input** will be preselected in the **Reminder** field.

   ▫ If the subject and description are not to be shown to other users, activate **Private**. Private tasks are marked with the **Private** icon 🔒.

   ▫ In order to add details like billing information, click on **Show details**. Enter the data required.

User interface:

Subordinated actions:

Related topics:

8.4.2   Creating recurring task

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

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

2. Enable **Repeat**. The current repetition parameters are displayed.

3. To set the repetition parameters, click on the value.

4. Set the repetition parameters:
   - In **Repeat**, you can set the interval between the appointments.
   - Below the interval, you can set the interval parameters.
   - In **Ends**, you can define when the recurring tasks ends.

Tip: Application examples can be found in Setting recurring appointments (p. 157)

Superordinated action:

   Creating new tasks (p. 194)
   Editing Tasks (p. 197)

8.4.3   Adding participants to a task

How to add participants in the task editing window:

1. In the input field below **Participant**, enter: the email address of the participant or the name of a group or distribution list.
   - While entering the recipients, matching suggestions will be displayed. To accept a suggestion, click on it.
   - To select contacts from an address book, click the **Select contact** icon ⬈ on the right side of the input field.

2. In order to remove a participant, click the **Remove** icon 🗑 next to the name.

Superordinated action:

   Creating new tasks (p. 194)
   Editing Tasks (p. 197)

Subordinated actions:

   Automatically adding email addresses from an address book (p. 113)
   Automatically adding email addresses from the address list (p. 114)

8.4.4   Adding attachments

How to add attachments in the task editing window:

1. Click on **Add attachments** below **Attachments**.

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

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

Superordinated action:

   Creating new tasks (p. 194)
   Editing Tasks (p. 197)

8.5   Responding to Task Invitations

Learn how to respond to a task invitation if a user or external partner adds you as participant to a task.

You will receive at least one of the following notifications:
- You will be informed about this task in the Notification area.
- You will receive an email invitation for the task.

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

How to respond to a task invitation in the notification area:

1. In the menu bar, click the **Notifications** icon . The Notification area is displayed.

2. Click on **Accept/Decline** below the invitation.

3. Enter a comment in the *Change confirmation status* window. Click on one of the buttons **Accept**, **Tentative** or **Decline**.

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

How to respond to a task invitation in an email invitation:

1. Display an email with a task invitation in the Email application.

2. Click on one of the buttons **Confirm**, **Temporary**, **Decline** in the detail view below **This email contains a task**.

User interface:

8.6   Editing Tasks

Learn how to edit a task's data later.

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

How to edit a task:

1. Select a task from the list.

2. Click on **Edit** in the toolbar. The task's data are displayed.

3. Edit the data.

4. Click on **Save**.

User interface:

> The editing window (p. 190)

Subordinated actions:

> Using the date picker (p. 155)
> Creating recurring task (p. 195)
> Adding participants to a task (p. 195)
> Adding attachments (p. 195)

Related topics:

> Marking tasks as done (p. 202)
> Changing a task's due date (p. 202)
> Changing task confirmations (p. 203)
> Creating new tasks (p. 194)

8.7   Calling Task Participants

Learn how to call a task participant by contacting the task participant via audio or video conference or phone.

Prerequisite:
- You have set up an account with an audio or video conference provider, e.g. Zoom.
- Your computer has been configured to allow you to make phone calls over the Internet.

How to call a task participant:

1. Select a task from the list. Click on a participant in the detail view. A pop-up opens.
   An icon below the name indicates the participant's presence status.

2. Click the **Call** icon 📞 in the detail view. Use one of the following methods:
   - In the menu, click on an audio or video conference provider, e.g. Zoom. The window for calling the contact opens. Click on **Call**.
   - Select a phone number from the menu.

User interface:

The Tasks detail view (p. 189)

Related topics:

Calling the Sender or Another Recipient (p. 76)
call contacts (p. 122)
Calling Appointment Participants (p. 167)
Scheduling audio/video conferences (p. 156)

Seting up and Configuring the Zoom Integration (p. 46)
Setting the Presence Status (p. 48)

8.8   Adding Task Folders

With task folders you can organize your tasks, e.g. by separately saving tasks for customers or projects. Learn how to create personal task folders and how to set the view for shared task folders.

The following options exist:
- Adding personal task folder (p. 200)
- Subscribing to public and shared task folders (p. 200)

User interface:

The Tasks folder view (p. 187)

Related topics:

Managing Tasks (p. 201)
Managing Data with Folders (p. 238)

8.8.1   Adding personal task folder

You can create additional personal task folders below My tasks.

How to create a new personal task folder:

1. In the folder view, click on **Add new folder**. A menu opens.

    Click on **Personal folder**. A window opens.

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

Related topics:

> Moving tasks to another folder (p. 202)
> Managing Data with Folders (p. 238)

8.8.2   Subscribing to public and shared task folders

Task folders that are public or shared by other users can be used as follows:

-   You can define which public and shared task folders are displayed in the folder view by subscribing to such folders.
    This helps you to keep a better overview if there are many public and shared task folders in your groupware environment.
-   If you subscribed to such a task folder, you can set whether this task folder will be synchronized with other clients, e.g. with your smartphone.
-   If you no longer need such a task folder, you can cancel the subscription.

How to define the task folders to which you want to subscribe and which are to be synchronized:

1. In the folder view, click on **Add new folder**. A menu opens.

    Click on **Subscribe shared task folder**.

    You can also use the **Subscribe shared task folder** button in the tasks settings.

    A window opens. It shows your private, the public and shared task folders.

2. If you want a task folder to be displayed, enable the **Subscribe to task folder** button ⬭.

    If you want a displayed task folder to be synchronized, enable the **Synchronize via DAV** checkbox.

    If you no longer want a task folder to be displayed and synchronized, disable the **subscribe task folder** button. ⬤⬭

User interface:

> The Tasks folder view (p. 187)
> Task Settings (p. 206)

Related topics:

> Accessing other users' shares (p. 252)
> Downloading Personal Data (p. 264)

8.9   Managing Tasks

Learn how to organize your tasks and about the task actions available.

- Marking tasks as done (p. 202)
- Changing a task's due date (p. 202)
- Moving tasks to another folder (p. 202)
- Changing task confirmations (p. 203)
- Importing tasks (p. 203)
- Exporting tasks (p. 204)
- Printing tasks (p. 204)
- Deleting tasks (p. 204)

User interface:

The Tasks toolbar (p. 187)

Related topics:

Adding Task Folders (p. 199)

8.9.1   Marking tasks as done

How to mark a task as done:

1. Select a task or multiple tasks from the list.

2. Click on **Done** in the toolbar.
    To mark the selected tasks as undone, click on **Undone**.

Related topics:

Editing Tasks (p. 197)
Changing a task's due date (p. 202)
Changing task confirmations (p. 203)

8.9.2   Changing a task's due date

How to change a task's due date:

1. Select a task from the list.

2. Click on **Due** in the toolbar. Select an entry.

Related topics:

Editing Tasks (p. 197)
Marking tasks as done (p. 202)
Changing task confirmations (p. 203)

8.9.3   Moving tasks to another folder

You can move tasks to another folder.

How to move tasks to another folder:

1. Select a task or multiple tasks from the list.

2. Click the **More actions** icon ☰ in the toolbar. Click on **Move**.

3. Select a folder in the *Move* window. You can create a new folder by clicking on **Create folder**.

4. Click on **Move**.

Tip: You can also move the selected objects by dragging the objects from the folder view to a folder.

Related topics:

Adding personal task folder (p. 200)

8.9.4   Changing task confirmations

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

How to change your task confirmation:

1. Select a task from the list.

2. Click the **More actions** icon ≡ in the toolbar. Click on **Change confirmation status**.

3. A window opens. Select a confirmation status. If required, enter a message.

4. you can enter a comment in the *Change confirmation status* window. Click on one of the buttons **Decline**, **Tentative** or **Accept**.

Related topics:

Editing Tasks (p. 197)
Marking tasks as done (p. 202)
Changing a task's due date (p. 202)

8.9.5   Importing tasks

You can import tasks from files in iCal format.

How to import tasks from an iCal file:

1. Select the task folder for importing the tasks to in the folder view.

2. Click the **Actions** icon ▤ next to the task folder. Click on **Import**.

3. In the *Import from file* window, click on **Upload file**. Select a file in iCal format.
    To also import tasks that have the same id as already existing tasks, enable **Ignore existing events**.

4. Click on **Import**.

Result: The tasks are added to the folder.

Related topics:

Exporting tasks (p. 204)
Creating new tasks (p. 194)

8.9.6   Exporting tasks

You can export tasks in the iCalendar format. You can e.g. use this format to exchange tasks with other calendar applications. You can export single tasks or all tasks from a folder.

How to export single tasks:

1. Select a task or multiple tasks from the list.

2. Click the **More actions** icon ≡ in the toolbar. Click on **Export**. The *Export selected* window opens.

3. Click on **Export**. Complete the entries.

How to export all tasks from a folder:

1. Select a personal or public tasks folder in the folder view.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Export**. The *Export folder* window opens.

3. Click on **Export**. Complete the entries.

Related topics:

8.9.7   Printing tasks

You can print the data of a single task or of multiple tasks.

How to print a task's data:

1. Select a task or multiple tasks from the list.

2. Click the **More actions** icon ≡ in the toolbar. Click on **Print**. A window with a print preview opens.

3. If required, change the printer settings. Click on the **Print** button.

4. Close the print preview window.

8.9.8   Deleting tasks

You can delete tasks.

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

How to delete tasks:

1. Select a task or multiple tasks from the list.

2. Click on **Delete** in the toolbar.

3. Confirm that you want to delete the task.

8.10   Searching for Tasks

Learn how to search for tasks by using the following search criteria:

- search terms for subject, description, attachments' names, participants
- folders that are to be searched
- the task's status
- task type: single or recurring task
- folder type: all, private, public, shared

How to search for tasks:

1. Click on the **Search** input field. Enter a search term in the input field.

   The search menu opens.

2. Define the data sources to be searched by clicking on an entry in the search menu.

   - If clicking on the search term or pressing enter, the following data sources are searched: subject, description

   - In order to only search in the subject, click on **in subject** in the search menu.
     Accordingly, you can limit the search to the description or the attachment's name.

   - In order to search for appointments with a specific participant, click on a name in the search menu.

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

3. To limit the search to specific tasks, click the **Options** icon ▼ in the search field. Use the following methods:

   - **Folders** allows to define the folders to be searched.
     If you select **All folders**, all private, public, and shared folders are searched.
   - **Task status** allows to search for tasks with a specific editing status.
   - **Task type** allows to limit the search to tasks or serial tasks.
   - **Folder type** allows to limit the search to private, public or shared tasks.

4. To refine the search result, enter further search terms: To remove a search term, click the **Remove** icon ✖ next to the search term.

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

User interface:

   The search bar (p. 25)

Related topics:

   Viewing Tasks (p. 191)

8.11   Task Settings

How to use the tasks settings:

1. Click the **Settings** icon ⊡ on the right side of the menu bar. Click on **Settings**.

2. Click on **Tasks** in the sidebar.

Depending on the configuration, the following settings are available:

Buttons

- **Subscribing to shared task folders**
  See Subscribing to public and shared task folders (p. 200)

Email notifications
Specifies whether you will receive an email notification, if the following is true:

- **Receive notifications when a task in which you participate is created, modified or deleted**
  A task in which you participate has been re-created, changed or deleted.
- **Receive notifications when a participant accepted or declined a task created by you**
  A participant accepted or declined a task created by you.
- **Receive notifications when a participant accepted or declined a task in which you participate**
  A participant accepted or declined a task in which you participate.

9   Drive

Learn how to use the Drive app to save and view files, documents and other media and use them together with other persons.

How to start the Drive app:

Click the **All Applications** icon ⊞ in the menu bar. Click on **Drive** in the App Launcher.

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

Topics:

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

9.1   The Drive Components

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

- The Drive toolbar (p. 209)
- The Drive folder view (p. 210)
- The Drive navigation bar (p. 210)
- The Drive display area (p. 211)
- The file details (p. 212)
- The viewer (p. 213)

9.1.1   The Drive toolbar

Contains functions for creating, editing and organizing files and folders. Notes:

- Some functions are only available if you opened a folder for which you have the appropriate permissions to create or edit objects.
- Some buttons are only displayed, if objects have been selected.
- If you have selected multiple files, some functions are not available.

Content

- **New**. Contains the following functions:
  - **Folder**. Creates a new folder.
  - **Text document**. Creates a new text document.
  - **Spreadsheet**. Creates a new spreadsheet.
  - **Presentation**. Creates a new presentation.
  - **Note**. Creates a simple text file.
- **Upload**. Contains the following functions:
  - **File**. Uploads a local file or multiple local files.
  - Depending on the configuration, a function for uploading files in an encrypted format will be available.
  - **Folder**. Uploads a local folder with all contents.
- **Edit**. Edits a text file or an Office document. This function is only available if selecting a text file or an Office document.
- **Share**. This function allows to share files or folders.
- **View** icon ⦿. Shows the contents of the selected file in the Viewer.
- **Download** icon ⤓. Downloads the files selected by you. Multiple files are downloaded as zip archive.
- **Present** icon ⊙. Starts a presentation. This function is only available if you select a document in the PowerPoint or PDF format.
- **Delete** icon 🗑. Deletes the files or folders selected by you.
- **More actions** icon ☰. Opens a menu with further functions.
- **View**. Allows to select the view in the display area.

General description of the user interface:

Related topics:

9.1.2   The Drive folder view

Displays the folders.

In order to display the folder view, click on **View** in the toolbar. Enable **Folder view**.

Content

- **My files**. Contains your personal files and folders. Per default, it contains folders for documents, music, images, and videos.
- **My shares**. Shows the files and folders shared by you for other users or external partners.
- **My attachments**. Displays the file attachments of emails sent or received by you.
- **Trash**. Contains the files and folders deleted by you.
- **Shared files**. Contains files shared with you by other users.
  If the shared data comes from another groupware installation, the user name will be appended with the name of the other domain.
- **Public files**. Contains files shared with all users.
- **Add storage account**. Opens a window for for adding cloud storage accounts that you set up in third party products like Dropbox.
- **Manage Shares**. Opens a window in which you can enable or disable your subscription of public and shared folders.

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

General description of the user interface:

Related topics:

9.1.3   The Drive navigation bar

The navigation path is located below the toolbar. The following functions are available:

- navigate within the folder structure
- sort and select objects

Functions

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

Related topics:

9.1.4   The Drive display area

Displays the files and folders as list, icons or tiles In order to select a view, click on **View** in the toolbar.
- For each file and folder a row with the following content will be displayed in the **List** view:
  - An icon. There are different icons for the single object types.
  - The name of the file or folder.
  - Date or time of the last change
  - In the case of files, the size is displayed.
- For each file and folder the following information is displayed in the **Icons** view.
  - An icon. If available, a file preview is shown.
  - The name of the file or folder
- Files and folders are displayed as squares in the **Tiles** view.
- Encrypted files are marked with the **Encrypted** icon 🔒.

General description of the user interface:

Related topics:

9.1.5   The file details

Displays information about the selected object in a sidebar.

In order to display the sidebar, click on **View** in the toolbar. Enable **File details**.

Content

- Details. Displays general information about the object selected in the display area:
  - the name of the file or folder
  - file size or number of objects in the folder
  - date of the last change
  - the editor's name
  - the parent folder's name
  - Some of the following data are displayed for pictures with Exif data: make, model, shot, ISO, capture date

  If you shared the object, the button next to **Shares** can be used to open the window for editing shares. When having selected an object in the **My attachments** folder, the **View message** button is displayed. If clicking on it, the respective email with the attachment is displayed.
- Description. Shows file comments, if available.
  To view the buttons for creating or editing a description, click the **Panel on/off** icon ▶.
- If there are several file versions, the **Versions** area is displayed. To view the list of versions, click the **Panel on/off** icon ▶.
  For each version the following information is displayed:
  - The version's file name. If clicking on it, a menu with several functions opens:
  - the version's file size
  - name of the user who uploaded the version
  - date and time of the version's upload
- **Upload a new version** button. Click on this button to select a file that is uploaded as new version.

Related topics:

The Drive display area (p. 211)
The viewer (p. 213)
Displaying a file's content (p. 215)
Working with versions (p. 230)

9.1.6   The viewer

Shows the contents of files.

In order to launch the viewer, do one of the following:
- Select a file. Click the **View** icon 👁 in the toolbar.
- Double-click on a file in the display area.
  Note: If double-clicking on an Office document, the respective Documents app is launched if configured accordingly.
- Select at least one file. Click on **View** in the context menu.

Content

- Name of the selected file. If clicking on the name, the *Rename* window opens.
- Depending on the selected file type, the respective functions are displayed.
    - If the selected file is editable, the **Edit** button is displayed.
    - If a document template is shown, the **New from template** button is displayed.
    - Depending on the content of the selected file, the **Zoom out** 🔍 and **Zoom in** icon 🔍 will be displayed.
    - If an image is shown and there are further images in the selected folder, the **Slideshow** button is displayed.
    - If a presentation or a PDF document is shown, the **Present** icon ◎ will be displayed.
- **Download** icon 📥. Downloads the file.
- **Share**. This function allows to share data.
- **More actions** icon ☰. Opens a menu with further functions. If displaying a document or a text file, the function **Print as PDF** is available. If there are several images, the **Run auto-play mode** function is available.
- **View details** icon ℹ. Opens or closes a sidebar with file details.
- **Pop out standalone viewer** icon ↗. Displays the contents of the selected file in a new browser tab.
  If the sidebar is displayed, you can use thumbnails to navigate through text documents, presentations and PDF documents.
- If there are further files, icons for browsing are displayed to the left and to the right of the view.

Related topics:

9.2   Viewing Files

Learn how to display various files, documents or pictures in different ways:

- Displaying a file's content (p. 215)
- Displaying email attachments in Drive (p. 216)
- Holding a presentation (p. 216)

User interface:

9.2.1   Displaying a file's content

The following options exist:
- display text files, documents or images in the Viewer
- view images as a slideshow
- play audio and video files, provided they are in a suitable format

How to display a file's content:

1. Open a folder containing files.

2. In order to select a view for the objects, click on **View** in the toolbar. Select one of those entries: **List**, **Icons**, **Tiles**. To display checkboxes for selecting files, enable **Checkboxes**.

3. In order to display details of a selected file, click on **View** in the toolbar. Enable **File details**.

4. Use one of the following methods:
   - Double-click on a file in the display area.
   - Select one or several files in the display area. Click the **View** icon 👁 in the toolbar.
   - Select **View** from the context menu.

   To display details for the selected file, enable the **Show details** icon 🛈.

   In order to open the previous or next file, click the **Back** ◀ or **Next** ▶ icon next to the view.

Tips:
- To change the sorting, click on **Sort by** in the navigation bar.
- To filter by specific object types, to select all files or to clear the selection, click on **Select** in the navigation bar.

Depending on the file type, different functions can be available:
- If the file content can not be displayed, a button for downloading the file will be shown.
- For text files and documents in the Office format, there are editing functions available: Information on editing documents can be found in the Documents user documentation.
- For images, a button for running a slideshow is available.
- For presentations, an icon for presenting the presentation is shown.
- For audio and video files in suitable formats, there are playing functions available.
  Note: The playing options depend from the browser used.
- In order to display the file in a browser tab, click the **Pop out standalone viewer** icon ↗.
  You can use thumbnails to navigate through text documents, presentations and PDF documents. To do so, enable the **Thumbnails** tab in the sidebar. Click on a thumbnail image.

User interface:

Related topics:

9.2.2   Displaying email attachments in Drive

The attachments of emails that have been sent or received by you, are displayed in a separate folder.

How to display email attachments:

1. In the Drive app, open the **My shares** folder.

2. To view an attachment's content, use the methods for viewing files.

    To display the email that belongs to the selected attachment, click on **View** in the toolbar. Enable **File details**. Click on **View message**.

User interface:

Related topics:

9.2.3   Holding a presentation

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

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

How to locally hold a presentation:

1. Open a folder containing presentations.

2. Select a presentation in the display area. Click the **Present** icon ⊙ in the toolbar.

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

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

    You can use the icons on the right side of the toolbar to adjust the sheet size.

3. In order to locally start the presentation, click on **Start presentation** in the toolbar. Select **Start local presentation**.

    During the presentation, the following functions are available:

    -   To display a function bar, hover the mouse over the bottom of the screen. The following functions are available:

        browse, display a specific sheet, display the participants list, pause presentation, activate fullscreen mode.

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

    -   If clicking the **Toggle fullscreen** icon ⛶, the fullscreen mode will be activated. You can use the [esc] key or the function bar at the bottom of the screen to leave the fullscreen mode.

4. In order to end the presentation, click on **End presentation** in the toolbar.

How to hold a remote presentation:

1. Open a folder containing presentations.

2. Select a presentation in the display area. Click the **Present** icon ⊙ in the toolbar.

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

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

    You can use the icons on the right side of the toolbar to adjust the sheet size.

3. Send the URL of the selected presentation to the users who should take part in the presentation. The users have to open the URL in their browser.

    If clicking the **Show participants** 👥 icon, the users who remotely take part in the presentation will be shown in the sidebar.

4. Click on **Start presentation** in the toolbar. Select **Start remote presentation**.

    During the presentation, the following functions are available:

    -   To display a function bar, hover the mouse over the bottom of the screen. The following functions are available:

        browse, display a specific sheet, display the participants list, pause presentation, activate fullscreen mode.

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

    -   If clicking the **Toggle fullscreen** icon ⛶, the fullscreen mode will be activated. You can use the [esc] key or the function bar at the bottom of the screen to leave the fullscreen mode.

5. In order to end the presentation, click on **End presentation** in the toolbar.

User interface:

The Drive display area (p. 211)
The file details (p. 212)
The viewer (p. 213)

Related topics:

Displaying a file's content (p. 215)
Displaying email attachments in Drive (p. 216)
Downloading Files or Folder Contents (p. 218)

9.3   Downloading Files or Folder Contents

Learn how to download single files or folder contents to your local device.

The following options exist:
- download one or several files
- download the complete content of a folder as zip archive

How to download files:

1. Open a folder containing files.
    Select one or several files in the display area.

2. Use one of the following methods:
    - Click the **Download** icon ⬇ in the toolbar.
    - Select **Download** from the context menu.
    - Use the **Download** button in the Viewer.

3. Complete the steps for downloading the folder.

Tip: Learn how to download a certain file version by reading Section 9.7.11, "Working with versions".

How to download the complete content of a folder:

1. In the folder view, select the folder which content you want to download.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Download entire folder**.

3. Complete the steps for downloading the folder. The folder's content is saved as a zip archive.

You can also download a folder by using the context menu in the display area.

Note: Depending on the configuration, attachments will be checked for viruses before being downloaded.
- If no virus is found, the attachments will be downloaded without any further notification.
- If a virus scan was not possible or a virus was found, a window with a respective warning opens.
  In this case you can cancel the download.

User interface:

The Drive display area (p. 211)
The viewer (p. 213)

Related topics:

Displaying a file's content (p. 215)
Displaying email attachments in Drive (p. 216)
Holding a presentation (p. 216)

9.4   Drive: Adding Folders

Learn how to create personal Drive folders and how to set the view for shared Drive folders:

User interface:

Related topics:

9.4.1 Drive: creating folders

You can create new folders in the current folder.

How to create a new folder:

1. In the folder view, open a Drive folder for which you have the permission to create objects.

2. Click on **New** in the toolbar. Click on **Folder**.

   In the folder view, you can also click the **Actions** icon ▤ next to the folder name. Click on **Add new folder**.

3. Enter a name in the *Add new folder* window. Click on **Add**.

Related topics:

Uploading Files or Folders (p. 221)
Creating or Editing Text Files (p. 222)
Organizing Files and Drive Folders (p. 223)
Searching for Files (p. 231)
Managing Data with Folders (p. 238)

9.4.2 Subscribing to public and shared Drive folders

You can define which public and shared Drive folders are displayed in the folder view by subscribing to such folders.

How to define the Drive folders you want to subscribe to:

1. In the folder view, click on **Manage Shares**.

   A window opens. It shows the public and shared Drive folders.

2. If you want a folder to be displayed, enable the **Subscribe to folder** button ⬭.

   If you no longer want a folder to be displayed and synchronized, disable the **Subscribe to folder** button. ⬤◯

Related topics:

Accessing other users' shares (p. 252)
Downloading Personal Data (p. 264)

9.5   Uploading Files or Folders

You can upload local files or folders to the current Drive folder.

How to upload files:

1. In the folder view, open a Drive folder for which you have the permission to create objects.

2. Click on **Upload** in the toolbar. Click on **File**.

3. Select a local file or multiple local files in the *Upload file* window.

    Click on **Open**. The current progress status will be shown in the display area.

    In the Settings, you can define whether a new file or a new version of a possibly existing file with the same name should be created.

How to upload a folder:

1. In the folder view, open a Drive folder for which you have the permission to create objects.

2. Click on **Upload** in the toolbar. Click on **Folder**.

3. Select a local folder in the *Select folder for upload* window.

    Click on **Upload**. The current progress status will be shown in the display area.

    Note: If there is already a Drive folder with this name, the name of the newly uploaded folder gets a consecutive number.

Tips:
-   In order to cancel the process, click on **Cancel** at the bottom right side of the display area.
    In order to cancel the process for single objects, click on **Details** at the bottom right side of the display area. Click on **Cancel** next to a object name in the *Upload progress* window.
-   You can continue working in the groupware during the upload process.
-   You can also upload objects by dragging them from a file browser or from the desktop to the Drive app window and drop them in the display area.
-   Depending on the configuration, there are functions available for uploading objects in an encrypted format.

User interface:

Related topics:

9.6   Creating or Editing Text Files

Learn how to create or edit text files with plain text.

How to create a new text file:

1. In the folder view, open a Drive folder for which you have the permission to create objects.

2. Click on **New** in the toolbar. Click on **Note**.

3. Enter a title.
    Enter the text or paste text from the clipboard.
    In order to edit the text, use the common techniques from the familiar applications.

How to edit a text file:

1. In the folder view, open a Drive folder for which you have the permission to create objects.

2. Use one of the following methods:
    ▪ Select a text file. Click on **Edit** in the toolbar.
    ▪ Double-click on a text file.
    ▪ Display a text file in the Viewer. Click on **Edit**.
    The text will be opened for editing.

3. In order to edit the text, use the common techniques from familiar applications.

User interface:

The Drive toolbar (p. 209)
The editing window (p. 31)

Related topics:

Drive: creating folders (p. 220)
Organizing Files and Drive Folders (p. 223)
Searching for Files (p. 231)
Managing Data with Folders (p. 238)
Sharing Data (p. 245)

9.7   Organizing Files and Drive Folders

Learn what you can do with files and Drive folders:

- Sending files as email attachments (p. 224)
- Editing file names (p. 224)
- Creating or editing descriptions (p. 225)
- Moving files or Drive folders (p. 225)
- Copying files (p. 226)
- Saving files as PDF (p. 226)
- Adding files to the portal (p. 227)
- Adding files or Drive folders to Favorites (p. 227)
- Deleting files or Drive folders (p. 228)
- Locking or unlocking files (p. 229)
- Working with versions (p. 230)

User interface:

The Drive toolbar (p. 209)
The Drive display area (p. 211)
The viewer (p. 213)

Related topics:

Drive: Adding Folders (p. 219)
Managing Data with Folders (p. 238)

9.7.1   Sending files as email attachments

You can send the current versions of files as email attachments.

How to send files as an email attachment:

1. Select one or several files in the display area.

2. Use one of the following methods:
   - Click the **More actions** icon ≡ in the toolbar. Click on **Send by mail**.
   - Click on **Send by mail** in the context menu.
   - Use the **More actions** icon ▤ in the Viewer.

3. In the email edit window, fill in the details to send a new email.

User interface:

The Drive display area (p. 211)
The viewer (p. 213)

9.7.2   Editing file names

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

How to edit the file name:

1. Select a file in the display area.

2. Use one of the following methods:
   - Click the **More actions** icon ≡ in the toolbar. Click on **Rename**.
   - Select **Rename** from the context menu.
   - Use the **More actions** icon ▤ in the Viewer.
   - Click on the file name on the upper left side of the Viewer.

3. Edit the file name in the *Rename* window.

User interface:

The Drive display area (p. 211)
The file details (p. 212)
The viewer (p. 213)

Related topics:

Creating or editing descriptions (p. 225)

9.7.3   Creating or editing descriptions

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

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

How to create or edit a file's description:

1. Select a file in the display area.
    If no details are displayed, click on **View** in the toolbar. Enable **File details**.

2. To view the buttons, click the **Panel on/off** icon ❯ next to **Description** in the sidebar.
    In order to add a description, click on **Add a description**.
    In order to edit a description, click on **Edit description**.

You can also use the function in the sidebar of the Viewer.

User interface:

Related topics:

9.7.4   Moving files or Drive folders

You can move the following objects to another folder:
- one or multiple files
- one or multiple folders
- a combination of files and folders

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

How to move objects to another folder:

1. Select the objects in the display area.

2. Use one of the following methods:
    - Click the **More actions** icon ≡ in the toolbar. Click on **Move**.
    - Select **Move** from the context menu.
    - Use drag and drop to move the items to a folder in the folder view.

3. Select a folder in the *Move* window. You can create a new folder by clicking on **Create folder**.
    Click on **Move**.

User interface:

Related topics:

9.7.5 Copying files

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

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

How to copy files to another folder:

1. Select one or several files in the display area.

2. Use one of the following methods:
   - Click the **More actions** icon ≡ in the toolbar. Click on **Copy**.
   - Select **Copy** from the context menu.

3. Select a folder in the *Copy* window. You can create a new folder by clicking on **Create folder**. Click on **Copy**.

User interface:

   The Drive display area (p. 211)

Related topics:

   Moving files or Drive folders (p. 225)

9.7.6 Saving files as PDF

You can save documents and text files in PDF format. The PDF file will be saved to the folder that contains the document or text file.

How to save a file in the PDF format:

1. Select a file in the display area.

2. Use one of the following methods:
   - Click the **More actions** icon ≡ in the toolbar. Click on **Save as PDF**.
   - Select **Save as PDF** from the context menu.
   - Use the **More actions** icon ▤ in the Viewer.

3. In the *Save as PDF* window, you can enter a name for the PDF file. Click on **Save**.

User interface:

   The Drive display area (p. 211)
   The viewer (p. 213)

9.7.7   Adding files to the portal

You can add a file as widget to the portal.

How to add a file to the portal:

Select a file in the display area. Click the **More actions** icon ☰ in the toolbar. Click on **Add to portal**.

User interface:

Related topics:

9.7.8   Adding files or Drive folders to Favorites

You can add frequently used objects like files or folders to the symbolic **Favorites** folder. The following functions are available:

▪ add objects to favorites
▪ remove objects from favorites

The original position of the objects in the folder view will not be affected by those actions.

How to add objects to Favorites:

1. Select the objects in the display area.

2. Use one of the following methods:
    ▪ Click the **More actions** icon ☰ in the toolbar. Click on **Add to favorites**.
    ▪ Select **Add to favorites** from the context menu.

How to remove objects from Favorites:

1. In the folder view, click on **Favorites**. Select the objects in the display area.

2. Click on **Remove from favorites** in the toolbar.

Result: The objects will be removed from Favorites. If Favorites is empty, the folder will be removed.

User interface:

Related topics:

9.7.9   Deleting files or Drive folders

You can delete objects in the same way as files and folders. The following options exist:

- Delete objects. The objects are moved to the **Trash** folder.
- Restore deleted objects from the **Trash** folder.
  The objects are restored in their original location.
- Permanently delete objects from the **Trash** folder. You can also permanently delete all items in a folder by emptying the trash.

Note: Depending on the configuration, some folders can not be deleted.

Warning: If you delete objects from the **Trash** folder, they are permanently deleted.

How to delete objects:

1. Select the objects in the display area.

2. Use one of the following methods:
   - Click the **Delete** icon 🗑 in the toolbar.
   - Select **Delete** from the context menu.

3. Confirm that you want to delete the items.

How to restore deleted objects:

1. Open the **Trash** folder.

2. Select the objects to be restored.

3. Use one of the following methods:
   - Click the **More actions** icon ≡ in the toolbar. Click on **Restore**.
   - Select **Restore** from the context menu.

Result: The objects are restored in their original location.

How to permanently delete objects:

Warning: Permanently deleted objects can **not** be restored.

1. Open the **Trash** folder.

2. Select the objects.

3. Click the **Permanently delete** icon in the toolbar. 🗑

4. Confirm that you want to delete the items.

How to permanently delete the content of the Trash folder:

Warning: Permanently deleted objects can **not** be restored.

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

2. Click the **Actions** icon ▤ next to the folder name. Click on **Empty folder**.

3. Confirm that you want to empty the folder.

9.7.10 Locking or unlocking files

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

- The file lock informs other users that the file is currently being edited and might no longer be up-to-date.
- If the file is located in a folder that you share with other users whom you granted edit permissions, those users can not edit the locked file.
- If you are the owner of a shared file and another user locks the file, you can always unlock it.

How to lock files:

1. Select one or several files in the display area.

2. Click the **More actions** icon ≡ in the toolbar. Click on **Lock**.

How to unlock files:

1. Select one or several locked files in the display area.

2. Click the **More actions** icon ≡ in the toolbar. Click on **Unlock**.

9.7.11 Working with versions

The following options exist:
- open or save the current version
- upload a new version
- apply functions to a specific version:
  - download
  - set as current version
  - delete the version
  - delete all previous versions

How to open or save the current version:

1. Select a file in the display area. Click the **Download** icon ⬇ in the toolbar.

2. Complete the steps for opening or downloading.

How to upload a new version:

1. Select a file in the display area. If no sidebar is displayed, click on **View** in the toolbar. Enable **File details**.

2. Click on **Upload new version** in the sidebar. Select a file.

3. Enter a version comment.

4. Click on **Upload**.

You can also use the function in the sidebar of the Viewer.

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

How to download or delete a specific version or make it the current version:

1. Select a file in the display area. If no sidebar is displayed, click on **View** in the toolbar. Enable **File details**.

2. To view a versions list, click the **Panel on/off** icon ▶ next to **Versions** in the sidebar.
   Click on a version. Select one of the functions from the menu:
   - **Download**. Downloads the version.
   - **Make this the current version**. Sets this version as the current version.
   - **Delete version**. Deletes this version only.
   - **Delete all previous versions**. Deletes all versions that are older than this version.

You can also use the function in the sidebar of the Viewer.

User interface:

Related topics:

9.8   Searching for Files

Learn how to search for files by using the following search criteria:
- search terms for file names, file descriptions
- folders that are to be searched
- file type: all, audio, documents, images, other, video
- file size
- time frame of the latest change, related to the current date: last week, last month, last year
- folder type: all, private, public, shared

How to search for files:

1. Click on the **Search** input field. Enter a search term in the input field.
    The search menu opens.

2. Define the data sources to be searched by clicking on an entry in the search menu.
    - If clicking on the search term or pressing enter, the following data sources are searched: file name, description
    - In order to only search in the file names, click on **in file name** in the search menu.
      Accordingly, you can limit the search to the file description.
    The search results are displayed in the list that is shown in the display area.

3. To limit the search to specific files, click the **Options** icon ▼ in the search field. Use the following methods:
    - **Folders** allows to define the folders to be searched.
      - If you select **All folders**, all private, public, and shared folders and subfolders are searched.
      - If you select a specific folder or the folder, only this folder is searched, but no subfolders.
    - **File type** allows to search for files of a certain type.
    - **File size** allows to search for files with a certain size.
    - **Date** allows to search for files that have been created within a specific time frame.
    - **Folder type** allows to limit the search to private, public or shared folders.

4. To refine the search result, enter further search terms: To remove a search term, click the **Remove** icon ✖ next to the search term.

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

User interface:

The search bar (p. 25)

Related topics:

Displaying a file's content (p. 215)

9.9   Accessing Files with WebDAV

Learn how to use WebDAV for accessing Drive app files in the same way as when accessing local files on your disk.

Compared with the access from the Groupware GUI, WebDAV has advantages and disadvantages:

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

Note: To create objects with WebDAV in a public or shared folder, you need to have at least the following permissions for the respective folder:

create objects, edit own objects.

To also read own objects, you additionally need this permission:

read own objects

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

- Setting up WebDAV under Linux (p. 233)
- Setting up WebDAV under Windows (p. 233)

9.9.1   Setting up WebDAV under Linux

How to set up WebDAV access under Linux:

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

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

9.9.2   Setting up WebDAV under Windows

How to set up WebDAV access under Windows:

1. In the navigation area of the Windows Explorer select the entry **This PC**.
    Click on the **Computer** tab at the top. Click on **Add network address**. The *Add network address* window opens. Click on **Next**.
2. Select **Select custom network address**. Click on **Next**.
3. Enter the following address in the **Internet or network address** input field.
    webdav://<address>/servlet/webdav.infostore
    Replace <address> with the groupware server's IP address or URL. Click on **Next**.
4. Enter your username and your password for the Groupware Server. Click on **OK**.
5. On the next page you can assign a name to the network address. Click on **Next**.
6. Click on **Finish**.

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

9.10   Adding Storage Accounts

Learn how to access your Cloud storage accounts, that you set up with other providers like Google Drive, Dropbox, Box or OneDrive, within the groupware. To do so you have to add your Cloud storage accounts to the groupware.

How to add a storage account:

1. In the folder view, click on **Add storage account**. The *Add storage account* window opens.

2. Click an icon. The further procedure depends on the cloud storage service provider:
    - If the provider asks for credentials, enter your credentials for the cloud storage account.
    - If the provider asks you for the permission to access the data, grant this permission.

A folder for the storage account appears in the folder view.

Options:
- To rename the folder, click the **Actions** icon ▤ next to the folder name or use the context menu.
- Depending on the folder content, you can use the toolbar functions, e.g. to view pictures or to copy files. Note: Depending on the storage account's functionality, working with versions might not be supported.

User interface:

Related topics:

9.11   Drive Settings

How to use the Drive settings:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. Click on **Drive** in the sidebar.

Depending on the configuration, the following settings are available:

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

- **Add new version**
  A new version of the file will be created.

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

- **Add separate file**
  A new file will be added. The file name is enhanced with a consecutive number.

Slideshow / autoplay mode for images
Defines how to present pictures that are displayed in the viewer

Advanced settings

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

Version history
Depending on the configuration, you can define the number of file versions that should be kept for a specific timeframe set by you. If the maximum timeframe or number is reached, older versions are deleted upon creation of a new version.

- **Time frame**
  Defines the period after which an older version is deleted when creating a new version.

- **File version limit**
  Defines the maximum number of versions. If the maximum is reached, an older version is deleted when creating a new version.

10 Data Organization and Shares

Learn how to organize your emails, contacts, appointments, tasks and other data and how to share them with other persons.

Information on encrypting emails and files can be found in *Encrypting Data with Guard* (p. 281)

10.1   Managing Data with Folders

Learn how to use folders in all apps for the following requirements:

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

What you should know:

- What are folder types? (p. 239)
- What is the purpose of permissions? (p. 240)

The following options exist:

- Navigating within the folder structure (p. 241)
- Hiding folders (p. 242)
- Adding folders to favorites (p. 243)
- Renaming folders (p. 243)
- Moving folders (p. 244)
- Deleting folders (p. 244)

Further information on files and folders in the Drive app can be found in Organizing Files and Drive Folders (p. 223).

User interface:

The Email folder view (p. 60)
The Address Book folder view (p. 104)
The Calendar folder view (p. 139)
The Tasks folder view (p. 187)
The Drive folder view (p. 210)
The Drive display area (p. 211)

Related topics:

Adding Email Folders (p. 77)
Adding Address Books (p. 123)
Adding Calendars (p. 168)
Adding Task Folders (p. 199)
Drive: Adding Folders (p. 219)

10.1.1 What are folder types?

The folder type defines the folder access for the users. The following folder types exist in the folder view:

- Personal folders
  - Personal folders contain your emails, 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 can be found below **My address books**, **My calenders**, **My tasks**, **My files** in the respective app.

Depending on the configuration, the following folder types are available in addition:

- Public folders
  - Public folders contain contacts, appointments, and documents that are of common interest to all users. Each user can create public folders and share them with other users.
  - The public folders for contacts, appointments, tasks, and files can be found below **Public address books**, **Public calenders**, **Public tasks**, **Public files** in the respective app.
- Shared folders
  - Shared folders have been shared with you by other users with read or write access.
  - The shared folders for contacts, appointments, tasks, and files can be found below **Shared address books**, **Shared calenders**, **Shared tasks**, **Shared files** in the respective app.

Related topics:

10.1.2 What is the purpose of permissions?

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

- As internal user you have preset permissions for existing folders.
  When creating a new folder, you will be granted the preset permissions.
- When inviting other persons to a shared item, you grant them particular permissions.
  Note: Depending on the configuration, you might not be able to grant permissions to other persons.

You have the following permissions for folders that already exist:

- You are the owner of your personal folders.
  The owner has the same permissions as an administrator. The owner has all permissions for this folder. The owner can grant other users permissions to the folder.
- You are allowed to create folders and objects in public folders.
- You are allowed to view folders and read objects in the Global Address book.

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

- If you create a new folder in a personal folder:
  - You are the owner.
  - In the Email app and the Drive app, other users inherit their permissions for the parent folder. In the other apps, other users do not inherit permissions.
- If you create a new folder in the **Public files** folder:
  - You are the owner.
  - Other users will get no rights. You have to set the permissions for the new folder. If you then create new subfolders in this folder, the permissions for this folder are inherited by the new subfolders.
- If you create a new folder in the shared folder of another user:
  - The user who shared the folder is the administrator of the new folder.
  - You are the author of the new folder.
    An author is allowed to change or delete existing objects, to create and edit new objects, and to create subfolders.
  - Other users will get the same rights as for the parent folder.
  Note: You need to have the permission to create objects in the shared folder.

Related topics:

10.1.3 Navigating within the folder structure

The following functions are available:
- open or close the folder view
- change the folder view width
- open or select a folder in the folder view or by using the navigation path

How to open or close the folder view:

Use one of the following methods:
- Click on **View** in the toolbar. Enable or disable **Folder view**.
- Click the **Open folder view** ≫ or **Close folder view** icon ≪ below the folder view.

How to change the folder view width:

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

How to open or select a folder:

1. If the folder view is closed, open it.
2. A folder in the Email and Drive app can have subfolders. To view subfolders, click on the triangle button next to the folder name.
   You can also open or close a folder by double-clicking on it.
3. Click on a folder. The folder's items are displayed in the detail view.
   In the Drive app, you additionally have the following options:
   - Click on an entry in the navigation bar to open a parent folder.
   - To open a folder, double-click on it in the detail view.

Superordinate actions:

Related topics:

10.1.4 Hiding folders

In the Address Book, Calendar or Tasks apps, you can hide certain personal, shared or public folders. The hidden folders will be displayed in a collective folder at the bottom of the folder view. The following functions are available:

- hide single folders
- display hidden folders again

How to hide a folder:

1. In the folder view of the Address Book, Calendar or Tasks app, select the folder you want to hide.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Hide**.

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

How to display a hidden folder again:

1. In the folder view of the Address Book, Calendar oder Tasks app, respectively select one of the entries **Hidden address books**, **Hidden calendars** or **Hidden tasks** The hidden folders will be displayed.

2. Click the **Actions** icon ▤ next to a folder name. Click on **View**.

Related topics:

10.1.5 Adding folders to favorites

You can add frequently used folders to the symbolic folder **Favorites**. The following functions are available:
- add folders to favorites
- remove folders from favorites

The original position of the objects in the folder view will not be affected by those actions.

How to add a folder to Favorites:

1. Select a folder in the folder view.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Add to favorites**.

How to remove a folder from Favorites:

1. Select a folder in the folder view below **Favorites**.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Remove from favorites**.
   You can also activate this function by right-clicking on the folder in its original position in the folder view.

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

Related topics:

10.1.6 Renaming folders

You can rename subfolders in your personal folders.

How to rename a folder:

1. In the folder view, select the folder that you want to rename.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Rename**.

3. Edit the name or enter a new name. Click on **Rename**.

Related topics:

10.1.7 Moving folders

You can move subfolders from your personal folders. For the target folder you need the permission to create subfolders.

How to move a folder:

1. In the folder view, select the folder that you want to move.
2. Click the **Actions** icon ▤ next to the folder name. Click on **Move**.
3. Select a folder in the *Move folder* window. You can create a new folder by clicking on **Create folder**.
4. Click on **Move**.

Related topics:

10.1.8 Deleting folders

You can delete subfolders in your personal folders.

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.

How to delete a folder:

1. In the folder view, select the folder that you want to delete.
2. Click the **Actions** icon ▤ next to the folder name. Click the **Delete** button.
3. Confirm that you want to delete the folder.

Related topics:

10.2   Sharing Data

You can co-operate with internal users or external partners by sharing your groupware data with read or edit permissions:

The following options exist:

- Sharing data (p. 246)
- Editing shares (p. 247)
- Resending an invitation (p. 249)
- Removing shares (p. 250)
- Viewing or editing shares in the Drive app (p. 251)
- Subscribing to shared or personal email folders (p. 252)
- Accessing other users' shares (p. 252)

Information about permissions that can be used when sharing, are to be found here:

- Which permissions can be used? (p. 253)
- Use cases for permissions (p. 255)

User interface:

The Email folder view (p. 60)
The Address Book folder view (p. 104)
The Calendar folder view (p. 139)
The Tasks folder view (p. 187)
The Drive folder view (p. 210)
The Drive display area (p. 211)
The viewer (p. 213)

Related topics:

What is the purpose of permissions? (p. 240)

10.2.1 Sharing data

You can share date with internal users or external partners with read or edit access by inviting those persons to a shared item. The external partners automatically will receive an invitation email.

The following options exist:

- You can share email folders with internal users with read access. If you share an email folder, its subfolders will not be shared.
- You can share address book and task folders with internal users with read or edit access, with external partners only with read access.
  Note: The global address book can not be shared.
- You can share calendars with internal users and external partners with read or edit access.
- In the Drive app, you can share folders and files with internal users and external partners with read or edit access. If you share a Drive folder, its subfolders will be shared automatically as well.
- In all apps except for the Email app, you can also create a public link and pass it on to other persons. Persons with the link can read the shared data but not edit them.

Note the following:

- In all apps except for the Drive app, shared folders are marked with the **Share** icon 👤. In the Drive app, shared objects will be displayed below the **My shares** folder.
- If you share an email folder with an internal user, the internal user has to subscribe to this email folder in order to be able to read the emails in this folder, see Subscribing to shared or personal email folders (p. 252).
- When sharing items, internal users or external partners are granted certain permissions for the shared data, see Which permissions can be used? (p. 253) and Use cases for permissions (p. 255).
- In order to share data, you need to have administrator permissions for the respective folder.
  You have the exclusive administrator rights for your personal address book, calendar and task folders. You can not grant administrator rights for these folders to other users.

If external partners access a share, the following rules and procedures apply:

- You select the persons and their permissions for accessing a shared item. Depending on the permissions, external partners will be signed in to the groupware with or without entering a password.
- A guest user can only view data and the respective apps that have been shared with the guest user.
- A guest user does not have access to the following elements: the Email app, the Portal app, the global address book.
- Guest users can not share items themselves.

How to share data with internal users or external partners:

1. Select the app that should be used for sharing data. Select a folder in the folder view.
    In the Drive app, you can also select a folder or file in the display area.
    Note: Depending on the app, some folders can not be shared.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Share / Permissions**.
    Click on **Permissions** in the Email app.
    In the Drive app, you can also click on **Share** in the toolbar or use the context menu in the display area.
    The window for granting permissions opens.

3. Note: The following option will not be available in the Email app.
    In **Who can access this folder?**, you can define whom to grant access to the data:
    ▪ If you exclusively want to share the data with specific persons, select **Invited people only**.
    ▪ If you want to share the data not only with specific persons, but with all persons who get a link to the data, select **Anyone with the link and invited people**.
      Persons with the link can only read the shared data. Other permissions can not be granted for public links.

4. To invite the wanted persons, enter a name or an email address in **Invite people**.
    ▪ To set a person's permission, select a user role in **Invite as**.
    ▪ To adjust the user role of a person added, click on the assigned user role next to the person or on **Details**.
    ▪ To remove a person's permission, click the **Actions** icon ▤ next to the person. Click on **Remove**.
    If you invite persons, the **Invitation message (optional)** input field will be displayed. If required, enter a message.
    If you selected **Anyone with the link and invited people**, you can pass on the link by clicking on **Copy link** next to the link.

5. In order to adjust the settings, click the **Sharing options** icon ⚙ in the title bar. The following settings are available:
    Link options:
    ▪ To set a time limit for the access to the shared data, select a time frame in **Expiration**.
    ▪ To protect the access with a password, enter a password in **Password (optional)**. Make sure the recipient of the public link receives the password.
    Invitation options
    ▪ To automatically send a message to persons who are invited by you to a shared item, enable **Send notification by email**.

Subordinated actions:

Related topics:

10.2.2 Editing shares

You can edit shared items that you created when inviting persons. The following options exist:
▪ adjust user roles or permissions
▪ add new persons to a share

In all apps except for the Drive app, shared folders are marked with the **Share** icon 👤. In the Drive app, shared objects will be displayed below the **My shares** folder.

How to edit existing shares:

1. In the folder view, select a folder that you shared.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Share / Permissions**. Click on **Permissions** in the Email app.
    In the Drive app, you can also click on **Share** in the toolbar.
    The window for granting permissions opens.

3. To edit the user roles or permissions, you have the following options:
    - To adjust a user role, click on the assigned user role next to the person.
    - To adjust the permission details, click on **Details** next to the person.
      Note:
        □ You cannot change the administrator permissions of a personal folder.
        □ Permissions can not be changed for public links.

4. To add new persons, enter a name or an email address in **Invite people**.

5. Click on **Save**.

Related topics:

10.2.3 Resending an invitation

You can resend an invitation to an already granted share.

How to resend an invitation to a person:

1. In the folder view, select a folder that you shared.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Share / Permissions**. Click on **Permissions** in the Email app.
    In the Drive app, you can also click on **Share** in the toolbar.
    The window for granting permissions opens.

3. Click the **Actions** icon ≡ next to a user name. Click on **Resend invitation**.

4. Click on **Save**.

Related topics:

10.2.4 Removing shares

The following options exist:
- revoke an invitation to a share
- remove a public link
- remove shares for a file or a folder in the Drive app

In all apps except for the Drive app, shared folders are marked with the **Share** icon ⚬. In the Drive app, shared objects will be displayed below the **My shares** folder.

How to revoke an invitation to a share:

1. In the folder view, select a folder that you shared.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Share / Permissions**. Click on **Permissions** in the Email app.
   The window for granting permissions opens.

3. Click the **Actions** icon ☰ next to a person's name. Click on **Revoke access**.

4. Click on **Save**.

How to remove a public link:

1. In the folder view, select a folder that you shared.

2. Click the **Actions** icon ▤ next to the folder name. Click on **Share / Permissions**.
   The window for granting permissions opens.

3. Click on **Unshare**.

How to remove the share for a file or a folder in the Drive app:

1. Click on **My shares** in the folder tree.

2. Select a share in the detail view. Click on **Revoke access** in the toolbar.

Related topics:

10.2.5 Viewing or editing shares in the Drive app

In addition to the basic functions, there are the following options in the Drive app:
- You can display your shared objects as a list. You can sort the list by different criteria.
- You can edit or revoke shares.

How to view your shares in the Drive app:

1. In the Drive app, open **My shares** in the folder view.

   The folders and files shared by you are displayed in the detail view. For each share a row with the following details is displayed in the detail view:
   - An icon indicates the share's object type: file or folder.
   - The share's name and folder path. To open a folder, click on a path entry.
   - Three icons indicate whether an object has been shared with specific users:
     - **Internal users** icon &: The object has been shared for internal users.
     - **External users** icon &+: The object has been shared for guest users or for guest users and internal users.
     - **Public link** icon %: The folder has been shared with a public link.
   - The share's creation date.

2. You can do the following:
   - To sort the shares list, click on **Sort by** above the list.
   - To display the folder of a shared object, open the object's context menu. Select **Show in Drive**.
   - To display the content of a share's parent folder, click on a path entry in the list.

How to edit a share in the Drive app:

1. In the Drive app, open **My shares** in the folder view.

   The folders and files shared by you are displayed in the detail view.

2. Select a folder or file in the detail view. You have the following options:
   - To edit the share, click on **Edit share** in the toolbar or context menu.
     Depending on the type of share, the window for editing the public link or the window for changing the permissions opens. Change the settings.
   - To revoke the share, click on **Revoke access** in the toolbar or context menu.

Related topics:

10.2.6 Subscribing to shared or personal email folders

In order to see email folders shared by other users, you have to subscribe to those folders. You are auto-matically subscribed to your personal email folders. To hide a personal email folder, you have to cancel the subscription.

How to subscribe to personal or shared email folders:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. Click on **Mail** in the sidebar.

3. Click on **Change IMAP subscription** in the display area.

4. In the *Subscribe IMAP folders* window enable the checkboxes of the folders that you want to subscribe to. Click on **Save**.

Related topics:

Sharing data (p. 246)
Editing shares (p. 247)
Resending an invitation (p. 249)
Removing shares (p. 250)
Downloading Personal Data (p. 264)

10.2.7 Accessing other users' shares

In the folder view, you have access to data shared with you by other users. You can define which public and shared address books, calendars or task folders are displayed in the folder view.

How to access data shared by other users:

1. Open the shared folder in the folder view. Depending on the app, you can find these folders below **Shared address books**, **Shared calendars**, **Shared tasks**, **Shared files**.

   If a user shared data with you, a folder named after the user will be displayed. If the shared data comes from another groupware installation, the user name will be appended with the name of the other domain.

   You are automatically subscribed to shared address books, calendars and task folders. To hide those folders, cancel the subscription in the settings of the respective app.

   Tip: To see the permissions that have been granted for the shared folder, click the **Actions** icon ▤. Click on **Share / Permissions**.

2. Open the folder to display its contents.

3. Select one or several objects. Use the function bar entries.

   Note: Depending on whether the objects are shared with read or edit rights, different functions can be available.

Related topics:

Which permissions can be used? (p. 253)
Use cases for permissions (p. 255)

Sharing data (p. 246)
Viewing or editing shares in the Drive app (p. 251)

Subscribing to shared or personal email folders (p. 252)
Subscribing to public and shared address books (p. 126)
Subscribing to public and shared calendars (p. 171)
Subscribing to public and shared task folders (p. 200)
Subscribing to public and shared Drive folders (p. 220)

10.2.8 Which permissions can be used?

In order to easily grant logical permission combinations, there are specific preset user roles: A user role consists of logical permission combinations. You can also grant detailed permissions. You can grant such permissions by sharing objects.

Administrator: A folder's owner
A folder's administrator owns all permissions for this folder. The owner can grant other users permissions to the folder.
- Folder permissions: create objects and subfolders, rename folders
- Object permissions: read all objects, edit all objects, delete all objects

Viewer: Read permissions
A viewer can read all existing objects. A viewer has no other permissions.
- Folder permissions: view the folder
- Object permissions: read all objects

Reviewer: Limited edit permissions
A reviewer can read and edit existing objects. The reviewer can not create new objects though. The reviewer can not delete objects.
- Folder permissions: view the folder
- Object permissions: read all objects, edit all objects

Author: Full edit permissions
An author is allowed to change or delete existing objects, to create and edit new objects, and to create subfolders.
- Folder permissions: create objects and subfolders
- Object permissions: read all objects, edit all objects, delete all objects

Detailed permissions
The preset permissions for the user roles can be refined. The following permissions can be granted:
- Folder
  - view the folder
  - create objects
  - create objects and subfolders
- Read permissions
  - none
  - read own objects
  - read all objects
- Write permissions
  - none
  - edit own objects
  - edit all objects
- Delete permissions
  - none
  - delete own objects
  - delete all objects

Related topics:

10.2.9 Use cases for permissions

The following examples show which permissions need to be granted to other users or external partners to enable them to execute specific actions in a shared folder. You can grant such permissions by sharing objects.

- **Example 1:** View objects. Not change and delete objects. Not create new objects.
  Settings in Details:
  - Folders: view the folder
  - Read permissions: read all objects
  - Write permissions: none
  - Delete permissions: none
  - Administrative role: User
  You can also assign the Viewer role.
- **Example 2:** View objects. Not change and delete objects. Create and edit new objects.
  Settings in Details:
  - Folders: view the folder
  - Read permissions: read all objects
  - Write permissions: edit own objects
  - Delete permissions: delete own objects
  - Administrative role: User
- **Example 3:** Not view existing objects. Create and edit new objects.
  Settings in Details:
  - Folders: create objects
  - Read permissions: read own objects
  - Write permissions: edit own objects
  - Delete permissions: delete own objects
  - Administrative role: User
- **Example 4:** View and edit all objects. Create and edit subfolders and objects,
  Settings in Details:
  - Folders: create objects and subfolders
  - Read permissions: read all objects
  - Write permissions: edit all objects
  - Delete permissions: delete all objects
  - Administrative role: User
  You can also assign the **Author** role.
- **Example 5:** All permissions. Grant permissions to other users.
  Settings in Details:
  - Folders: create objects and subfolders
  - Read permissions: read all objects
  - Write permissions: edit all objects
  - Delete permissions: delete all objects
  - Administrative role: administrator
  You can also assign the **Administrator** role.

Related topics:

10.3   Appointing a Deputy

You can appoint other users to act as your deputy. You can grant one or multiple deputies different permission levels to handle the email communication and appointment scheduling in your name.

The following options exist:

- Adding deputies (p. 258)
- Viewing, editing, deleting deputies (p. 259)

Related topics:

10.3.1 Adding deputies

The following options exist:

- set one or multiple deputies
- grant a deputy specific permissions for your email correspondence
- grant a deputy specific permissions for your calendar

How to set one or more deputies:

1. Click the **Settings** icon ⚙ on the right side of the menu bar. Select **Settings**.

    Select **Basic settings** in the sidebar. Click on **Manage deputies** in the display area.

    You can also use one of the following methods:

    - In the Email app, click on the **Inbox** context menu in the folder view.
      Select **Manage deputies**.
    - In the Calendar app, open the context menu of your personal calendar in the folder view.
      Select **Manage deputies**.

    The *Manage deputies* window opens.

2. To add a deputy, enter the deputy's email address in **Add people**.

    - While entering the recipients, matching suggestions will be displayed. To accept a suggestion, click on it.
    - To select deputies from an address book, click the **Select contacts** icon 🔖 on the right side of the input field.

    The *Deputy* window opens.

3. Define the email actions to be covered by your new deputy by selecting an entry next to **Inbox**.

    - Reading, replying to, forwarding, marking, printing, copying emails: Select **Viewer**.
    - All of the above and marking all messages in the inbox as read: Select **Editor**.
    - All of the above and deleting emails, executing folder actions: Select **Author**.
    - Sending emails on your behalf: Enable the respective checkbox.

4. Define the appointment actions to be covered by your new deputy by selecting an entry next to **Calendar**.

    - Reading, exporting, printing appointments and sending emails to the appointment participants: Select **Viewer**.
    - All of the above and creating, editing, declining appointments, changing the status, move to another calendar: Select **Editor**.
    - All of the above and deleting appointments, executing folder actions: Select **Author**.

Related topics:

10.3.2 Viewing, editing, deleting deputies

The following options exist:
- display a list of your deputies
- change a deputy's permissions
- add deputies
- remove deputies

How to view, edit or delete deputies:

1. Click the **Settings** icon ⚙ on the right side of the menu bar. Select **Settings**.
   Select **Basic settings** in the sidebar. Click on **Manage deputies** in the display area.
   You can also use one of the following methods:
   - In the Email app, click on the **Inbox** context menu in the folder view.
     Select **Manage deputies**.
   - In the Calendar app, open the context menu of your personal calendar in the folder view.
     Select **Manage deputies**.

   The *Manage deputies* window opens.

2. The following options exist:
   - To add a deputy, enter the deputy's email address in **Add people**.
     To select deputies from an address book, click the **Select contacts** icon ▣ on the right side of the
     input field.
   - To change a deputy's permissions, click on **Edit** next to the deputy.
     Change the permissions in the *Deputy* window.
   - To remove a deputy, click the **Remove** icon ✖ next to the deputy.
     Confirm that you want to remove the deputy.

Related topics:

Adding deputies (p. 258)

10.4   Managing Accounts

Learn how to manage your accounts that have been set up by default or have been set up by you.

- your primary email account
- functional email accounts, if available
- social network accounts
- your Google account for calendar, contacts, Drive
- storage accounts

The following options exist:

- Editing the primary email account (p. 261)
- Disabling or enabling functional email accounts (p. 262)
- Viewing, editing, deleting accounts (p. 262)

10.4.1 Editing the primary email account

You can edit your primary email account:
- Change the name of your primary email account. This name is displayed in the email settings.
- Change the preset sender name
- Change the folder of your primary email account

How to edit the primary email account:

1. Click the **Settings** icon ⊡ on the right side of the menu bar. Click on **Settings**.
2. In the sidebar, click on **Accounts**.
3. Click on **Edit** next to the primary email account in the display area. The *Edit mail account* window displays the current settings.
4. To change the account name, click into the input field next to **Account name**.
   Note: The entries for **Incoming server** and **Outgoing server** can not be changed.
5. To change the preset sender name, click into the input field next to **Your name**.
   You can overwrite this preset name when composing an email.
6. To select other folders, browse down to **Standard folders**.
   Click on **Select** next to a folder. Select a subfolder below the **INBOX** folder.
   Note: Do not select the **INBOX** folder. Select a subfolder below **INBOX**.

Related topics:

Viewing, editing, deleting accounts (p. 262)
Disabling or enabling functional email accounts (p. 262)
Adding Email Accounts (p. 96)
Settings for composing emails (p. 99)

10.4.2 Disabling or enabling functional email accounts

Depending on the configuration, the administrator can assign a functional email account to you, for example support@example.com. This account will be displayed in the folder view. If the account is not to be displayed, you can disable the account.

How to disable or enable functional email accounts:

1. Click the **Settings** icon ⊡ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Accounts**.

3. Click on **Disable** next to the functional email account in the display area.
   The email account will no longer be displayed in the folder view.
   To use a disabled email account again, select **Enable**.

User interface:

   The Email folder view (p. 60)

Related topics:

   Editing the primary email account (p. 261)
   Viewing, editing, deleting accounts (p. 262)
   Using Unified Mail (p. 87)
   select a sender address (p. 69)

10.4.3 Viewing, editing, deleting accounts

Depending on the configuration and the account type, you can edit different account settings:

▪ for email accounts: account name, sender name, Unified Mail usage, server parameters, folder names

▪ for social networks: account name

How to view, edit or delete accounts:

1. Click the **Settings** icon ⊡ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Accounts**.

3. Click on **Edit** next to an account in the display area. The settings are displayed in an editing window.
   If you use several services from the selected provider, the editing window shows an overview of the services.

4. Change the settings.
   Notes for editing external email accounts:
   ▪ To change the preset sender name, click into the input field next to **Your name**.
   ▪ You can overwrite this preset name when composing an email.

Further options in the editing window:

▪ Depending on the account type, you can open the respective folder in the corresponding app by clicking on the name of the service.

▪ If you no longer want to access an account from within the groupware, you can delete this account.
   To do so, click the **Delete** icon 🗑 next to an account.

Related topics:

   Editing the primary email account (p. 261)
   Disabling or enabling functional email accounts (p. 262)
   Adding a Portal widget for social networks (p. 55)
   Adding Email Accounts (p. 96)
   Using Unified Mail (p. 87)

10.5   Downloading Personal Data

Depending on the configuration, you can download your personal data within the groupware:

- emails received and sent
- contacts, appointments, tasks
- the data in Drive

Note the following:

- Depending on the data volume, the download can take a while.
- The data are delivered in common data formats.
- The data are downloaded as zip archive.

How to download your personal data:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Download personal data**.

3. Select the apps whose data should be downloaded. You can use different options for the single apps.
   Click on **Request download**.
   While the data are being zipped to an archive, you can continue with your work.
   In order to cancel the process, click on **Abort download request**.

4. You will get an email as soon as the archive can be downloaded. Click on **Download** in the email.
   The *Download your personal data* page will be displayed again. Click the **Download** icon ⬇.
   Note: On top of the page you can see how long the zip archive will be available. After this period, the archive will be automatically deleted.

Options:

- For each app, you can define whether specific folders should be downloaded as well. To do so, click on **Options** below the app. The following options exist:
  - Email

    Define the email folders that should be downloaded.

    In case you also want to download folders that you are currently not subscribed to, enable **Unsub-scribed folders**.
    Then, all folders will be downloaded that are currently shared with you or that are included in your primary email account, even if those folders are not visible in the folder tree.
  - Calendar

    Define the calendars that are to be downloaded in addition to your private calendars.

    In case you also want to download shared calendars that you are no longer subscribed to, enable **Unsubscribed calendars**.
    Then, all calendars will be downloaded that are currently shared with you even if those calendars are not visible in the folder tree.
  - Address Book

    Define the address books that are to be downloaded in addition to your private address books.
  - Drive

    Define the folders that are to be downloaded in addition to your private address folders.

    In order to not only download the current version but all versions of a file, enable **Include all file versions**.
  - Tasks

    Define the task folders that are to be downloaded in addition to your private task folders.
- If the zip archive exceeds a certain file size, it will be split in several zip files. In **Maximum file size**, you can set the maximum size of the single zip files.

Note: The zip archive will be ready for download on the server for a specific period. If you request your data a second time within this period, the current zip archive will be deleted on the server.

Related topics:

11 Data Security

Learn how to increase the data security when working with the groupware.

- Protect your data against unauthorized access.
- Minimize the threat of malware.
- Prevent the reception of unwanted messages.

The following options exist:

- Signing Out Automatically (p. 268)
  You can define whether you are automatically signed out.
- Externally Linked Images in Emails (p. 269)
  You can define whether externally linked images in emails are automatically loaded and displayed.
- Showing the Email Authenticity (p. 270)
  You can define the emails for which the authenticity is displayed.
  Note: Depending on the configuration, this function might not be available.
- use allowlists (p. 271)
  You can enter trusted email sources in an allowlist
  Note: Depending on the configuration, this function might not be available.
- Displaying or Signing Out from Active Clients (p. 272)
  You can display active clients and sign out of them if required.
- Using Additional Passwords for Applications (p. 273)
  You can create and manage additional passwords to use with other devices.
- Multi-Factor Authentication (p. 274)
  You can set up a 2-step verification for the login.

In addition, you can encrypt your emails and files. Information on encryption can be found in *Encrypting Data with Guard* (p. 281)

11.1 Signing Out Automatically

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

How to define whether you are automatically signed out:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Security**.

3. Select an entry from the **Automatic sign out** drop-down in the display area.

Related topics:

11.2   Externally Linked Images in Emails

Externally linked images are not part of the email itself. They are loaded from an external source upon reading the email. You can define whether those images are loaded and displayed. If you allow loading externally linked images, your privacy and computer are endangered by the following security issues:

- The sender can gather information, e.g. whether your email address is valid or when you retrieved the email. Such information can e.g. be used to purposefully send spam emails.
- The externally linked graphic can be used to infect your computer with malware.

How to define the loading of externally linked images:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Security**.

3. You can enable or disable the **Allow pre-loading of externally linked images** option in the display area.
   - If externally linked images are not to be displayed, disable the setting.
   - If externally linked images are to be loaded and displayed, enable the setting.

Related topics:

Signing Out Automatically (p. 268)
Showing the Email Authenticity (p. 270)
use allowlists (p. 271)
Displaying or Signing Out from Active Clients (p. 272)
Using Additional Passwords for Applications (p. 273)

Viewing Emails (p. 65)

11.3   Showing the Email Authenticity

For incoming emails, the server checks whether the email actually originates from the provided sender address. The check is run to identify illegitimate emails. The email authenticity check provides one of the following results:

- The email is classified as potentially dangerous. In the detail view, the sender is displayed in red font color.
- The authenticity cannot definitely be verified. In the detail view, the sender is displayed in yellow font color.
- The verification was successful. In the detail view, the sender is displayed in green font color.
- The verification was successful. The email was sent from a trustworthy address.

Depending on the configuration, you can define the emails for which the authenticity is displayed.

How to define the emails for which the authenticity is displayed:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Security**.

3. Select an entry from the **Show email authenticity** drop-down in the display area.

   - **Disabled**. No authenticity is displayed. If a hoster marks the email sent from the hoster's address as trustworthy though, this authenticity will be displayed.
   - **Suspicious and unclassified emails only**. Displays the authenticity for the following emails:
     - emails that are classified as potentially dangerous.
     - Emails which authenticity can not definitely be verified
   - **All emails**. Displays the authenticity for all emails.

Related topics:

Signing Out Automatically (p. 268)
Externally Linked Images in Emails (p. 269)
use allowlists (p. 271)
Displaying or Signing Out from Active Clients (p. 272)
Using Additional Passwords for Applications (p. 273)

Viewing Emails (p. 65)

11.4   use allowlists

Depending on the configuration, you can create an allowlist. All emails from senders who are recorded in the allowlist, are treated as follows:

- The email is not treated as unwanted email.
- The email source is labeled as trustworthy.
- Externally linked images are immediately loaded and displayed.

Warning: When making entries into the allowlist, several security measures are circumvented. Only enter emails or domain names in the allowlist if you absolutely trust them.

How to create an allowlist:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Security**.

3. Enter the respective email addresses or domain names as comma separated list in the input field below **Always trust mails from the following senders** in the display area. Please also note:
   - When entering multiple email addresses or domain names, separate the entries with a comma.
   - Make sure to enter the exact email addresses or domain names.

Related topics:

Signing Out Automatically (p. 268)
Externally Linked Images in Emails (p. 269)
Showing the Email Authenticity (p. 270)
Displaying or Signing Out from Active Clients (p. 272)
Using Additional Passwords for Applications (p. 273)

Viewing Emails (p. 65)

11.5 Displaying or Signing Out from Active Clients

You can be signed in to your groupware account with different clients on various devices simultaneously, e.g. with desktop browsers, tablets, smartphones. With each login, an active session is created on the groupware server. On the following occasions it can make sense to list active sessions and to terminate them if required:

▪ You want to check whether you are logged in to a certain device or client.

▪ You want to log our from a certain device.

▪ You want to prevent reaching the maximum number of allowed sessions as you then could no longer log in to a further device.

The following options exist:

▪ display all active clients
Note: Email clients that are connected to the Groupware Server via IMAP will not be displayed.

▪ terminate single sessions

▪ terminate all sessions except the current one

How to edit the active clients:

1. Click the **Settings** icon ✛ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Security**. Click on **Active clients**.

    In the display area, all devices will be listed which you are currently signed in with.

3. In order to terminate sessions, do one of the following:

    ▪ In order to terminate a single session, click on **Sign out** next to the client.

    ▪ To terminate all sessions except the active one, click on **Sign out from all clients**.

Related topics:

11.6   Using Additional Passwords for Applications

In addition to your groupware login method, you can use additional passwords that are limited for the use on certain apps and devices. This method has the following advantages:

- The clients can access specific groupware functions only. This enhances the security for the user.
- In the groupware settings you can view the clients and devices you created passwords for.
- You can delete passwords and prevent a client access, e.g. when losing a device.

The following options exist:

- create a new password for a specific app
- display or delete existing app passwords

How to use passwords for a specific app:

1. Click the **Settings** icon ⊡ on the right side of the menu bar. Click on **Settings**.

   In the sidebar, click on **Security**. Click on **Application Passwords**.

   The *Application Passwords* page will be displayed.

2. In the **Application** drop-down below **Add passwords**, select the app for which you want to add a password.

   Enter a name for the new password in **Password name**. This name is later used for displaying the app's credentials.

3. Click on **Add new password**.

   The *Password Created* window opens. It shows the user name for the login and an automatically created password. You can use those credentials to sign in to the selected app.

   Notes:

   - This password is only valid for the selected app.
   - This password will only be displayed once. As soon as you close the window, you can no longer display the password.

4. To delete a password for a specific app, identify the password below **Existing passwords**. Click the **Delete** icon ⎙ next to the password.

   To sign in to this app in the future, either use your groupware credentials or again create a password for this app.

Related topics:

11.7   Multi-Factor Authentication

Per default, you only log in to the groupware with your username and password. Depending on the configuration, you can increase the security when logging in by using an additional authentication that is executed after the usual login. This procedure is generally called multi-factor authentication.

The additional authentication is done by verifying your identity with a device owned by you. You have the following options to verify your identity:

- Google Authenticator
  You need to install an app on your mobile device to get an auto-generated code. You need to enter this code to confirm your identity.
- Yubikey, Google Security Key or compatible FIDO device
  With a security key that is connected with your PC via USB or wirelessly, your identity is verified during the login.
- send code via SMS
  An SMS with a code is sent to your mobile device. You need to enter this code to confirm your identity.

The following options exist:

11.7.1 Setting up verification methods

Prior to being able to use a 2-step verification for the next login, you have to set up the additional verification methods wanted. The following options exist:

▪ Set up verification methods.

▪ As soon as having set up an initial verification method, you have to set a recovery method. You need the recovery e.g. in case you have lost your device that you use for the verification.
In this case, you can log in to the groupware by using the recovery method.

How to set up verification methods:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

   In the sidebar, click on **Security**. Click on **2-step verification**.

2. Click on **Add verification option** in the display area.

   The *Add verification option* window opens. Depending on the configuration, various verification methods are offered.

3. Setting up a verification by using an Authenticator App:

   a. Install a Google Authenticator or compatible app on the mobile device that you want to use for the verification.
      Launch the app.

   b. Click on **Google Authenticator or compatible** in the *Add verification option* window.

   c. The *Authenticator registration* window displays a QR code. Scan the QR code with the Authenticator app on the mobile device.

   d. The app on the mobile device displays a code. Enter this code in the *Authenticator registration* window.

   When having set up the initial verification method, the *Add recovery option* window is displayed. In the following instruction, you will learn how to add a recovery method.

4. Set up a verification with a security key:

   Note: Depending on the browser, this verification method might not be supported.

   a. Connect your security key with your computer. Depending on the security key, a USB or wireless connection is used.

   b. Click on **Yubikey, Google Security Keys or compatible FIDO device** in the *Add verification option* window.

   c. Activate your security key e.g. by pressing a button on the security key.

   When having set up the initial verification method, the *Add recovery option* window is displayed. In the following instruction, you will learn how to add a recovery method.

5. Setting up a verification via text message:

   a. Click on **Code via text message** in the *Add verification option* window.

   b. The *Add Multifactor Device* window opens. Enter your mobile phone number.

   c. Shortly after, you will receive a text message with a code. Enter this code in the *Confirm Code* window.

   After having set up the initial verification method, the *Add recovery option* window opens. In the following instruction, you will learn how to add a recovery method.

How to add a recovery method in the *Add recovery option* window:

1. Setting up a recovery via text message:

   Note: When having selected the verification via text message as initial verification method, you have to enter another mobile device for a recovery via text message.

   a. Click on **Code via text message**.

   b. The *Add Multifactor Device* window opens. Enter the phone number of the mobile device that you want to use for a recovery.

   c. Shortly after, you will receive a text message with a code. Enter this code in the *Confirm Code* window.

2. Setting up a recovery via recovery code:

   a. Click on **Backup code to access your account**.

   b. The *Recovery code* window opens. It displays a code that can be used for the recovery.

   c. In order to print the recovery code, click on **Print**.

   In order to save the recovery code as text file, click on **Download**. In case of a recovery, you can import the recovery code from this text file.

Related topics:

11.7.2 Verifying a login by using an authenticator app

This verification method works as follows:

- Use a code that is created by an app on your mobile device.
- The code is valid for 30 seconds. As soon as the time expires, a new code is automatically displayed which again is valid for 30 seconds.
- When logging in, you have to use the same authenticator app that you used for setting up the verification method.

How to verify your identity with an authenticator app:

1. Launch the authenticator app on your mobile device.

   If the app displays multiple services, select the service that you use for verifying the groupware login.

2. Log in to the groupware with your username and password.

3. If having set up multiple verification methods, the *Select 2-step verification method* window opens. Select **Google Authenticator**.

   The *2-Step Verification* window opens. In **Authentication Code**, enter the code that is currently displayed by the app on your mobile device.

Related topics:

11.7.3 Verifying the login with a security key

This verification method works as follows:

- Use a security key that you connect with your computer via USB or wirelessly.
- While signing in, you are prompted to activate the security key e.g. by pressing a button on the security key.

Note: Depending on the browser, this verification method might not be supported.

How to verify your identity with a security key:

1. Connect your computer with the security key.

2. Log in to the groupware with your username and password.

3. If having set up multiple verification methods, the *Select 2-step verification method* window opens. Select **Yubikey, Google Security Keys or compatible FIDO device**.

   The *Confirm Code* window opens.

   Activate your security key.

Related topics:

11.7.4 Verifying the login with an SMS code

This verification method works as follows:
- Use a code that you receive per SMS on your mobile device.
- The last digits of the mobile phone number of the device to which the SMS is sent to, are displayed.

How to verify your identity with an SMS code:

1. Log in to the groupware with your username and password.

2. If having set up multiple verification methods, the *Select 2-step verification method* window opens. Select **SMS Code**.
   An SMS with a code is sent to your mobile device.

3. The *2-Step Verification* window opens. Enter this code.

Related topics:

Verifying a login by using an authenticator app (p. 277)
Verifying the login with a security key (p. 277)
Setting up verification methods (p. 275)

11.7.5 Recovering verifications

You need the recovery e.g. in case you have lost your device that you use for the verification. In this case, you can log in to the groupware by using the recovery method.

How to log in using a recovery method:

1. Recovering with a recovery code:

   a. Click on **I lost my device** in the *2-Step Verification* or *Select 2-Step Verification Method* window.
      In a window, you are asked to enter the recovery code.

   b. Enter the recovery code.
      If you downloaded the recovery code as text file when having set up the recovery method, you can also click on **Upload recovery file**. Select the text file with the recovery code.

   c. Shortly after, you will receive an SMS with a 4-digit authentication code. Enter this code.

2. Recovering via an SMS code:

   a. Click on **I lost my device** in the *2-Step Verification* or *Select 2-Step Verification Method* window.
      In a window, you are asked to enter the recovery code.

   b. Shortly after, you will receive an SMS with a 4-digit authentication code. Enter this code.

Related topics:

Verifying a login by using an authenticator app (p. 277)
Verifying the login with a security key (p. 277)
Setting up verification methods (p. 275)

11.7.6 Managing verification methods

The following options exist:
- add a verification method
- change a verification device's name
- remove a verification device

You can set up and manage multiple verification methods but only one recovery method.

How to manage verification methods or verification devices:

1. Click the **Settings** icon ▣ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Security**. Click on **2-step verification**.

3. The following options exist:
    - **Edit**. Opens the *Edit multifactor device* window to change the name of the device.
    - **Delete** icon. Removes a verification device.
    - **Add verification option**. Adds a new verification method.

Related topics:

12 Encrypting Data with Guard

Learn how to encrypt your emails and files with Guard.

- Encrypt your email communication with other users or external partners.
- Encrypt your files. Share the encrypted data with other users.
- Use the security options to define the encryption level.
- The encrypted data are password-protected. Depending on the configuration, you can reset your password if forgotten.

The following options exist:

Information on further security-related topics can be found in *Data Security* (p. 267).

12.1   Setting up Guard

Prior to be able to use Guard, you have to apply some basic settings:

- You have to enter a Guard security password that is used to encrypt data and to access encrypted data.
- Enter a secondary email address that is used if you forget your Guard security password. In this case, use the function for resetting the Guard security password. A new password will then be sent to you. For security reasons, it is highly recommended to enter a secondary email address for this purpose. Otherwise the new password will be sent to your groupware email account.

There are two options for making the basic settings:

- Define the basic settings while initially using an encryption function.
- Define the basic settings in the groupware settings before using the encryption function.

How to define the basic settings when initially using an encryption function:

1. Enable the encryption function when composing an email, encrypting a file or uploading a new file by clicking on the **Encrypt** icon 🔓.

2. You consecutively will be asked to enter a Guard security password and a secondary E-Mail address. Enter the data.

How to define the basic settings before initially using an encryption:

1. Click the **Settings** icon ⚙ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Security**. Click on **Guard Security**.

   When initially opening the Guard security settings, the *Guard Create Security Keys* window opens.

3. In the **Password** field, enter the password that you want to use for encrypting your data.

   Confirm the password in the **Verify** field by entering it again.

4. In the **Enter new secondary email** field, enter the email address that is used for receiving a temporary password for resetting your Guard security password.

12.2   Encrypting Email Conversations

The following options exist:

- Reading encrypted emails (p. 283)
- Sending encrypted emails (p. 284)
- How can external recipients read an encrypted email? (p. 285)
- Encrypting incoming emails by using a filter rule (p. 285)

12.2.1   Reading encrypted emails

To be able to read an encrypted email, the Guard security password is required.

How to read an encrypted email:

1. Select an email with the **Encrypted** icon 🔒. In the detail view, the notification **Secure Email, enter your Guard security password.** is displayed.

   Note: If, when having used guard the last time, you set that Guard should remember the security password, the email will be displayed immediately.

2. Enter the Guard security password.

   You can define how long the security password should be remembered by Guard. To do so, enable Keep me logged into **Guard** . Select a time range from the list.

   In the Guard security settings, you can define a default value for the time range.

3. Click on **OK**. The content is shown in plain text.

   If the email includes attachments, functions for using the attachments' decrypted or encrypted versions will be displayed.

Related topics:

Sending encrypted emails (p. 284)

How can external recipients read an encrypted email? (p. 285)

12.2.2 Sending encrypted emails

The following options exist:

- Send an email encrypted. Only you and the recipients can read the email content.
- Sending an email with a signature. The signature ensures that the recipient is able to recognize whether the email content has been changed on the transport.
- Sending an encrypted email with a signature.

How to send an encrypted email:

1. Click the **Enable Encryption** icon 🔓 in the button bar of the email editing window. A function bar will be displayed above the email text. A text will be displayed within the function bar notifying you about the encryption of the email.

   Icons next to the recipients indicate whether the message can be encrypted for this recipient. If hovering over an icon, a description will be displayed.

2. In order to show further options, click on **Options** ▼ in the function bar.

   - In order to additionally sign the email, enable **Sign email**.
     You can also click on the **Options** menu ≡ in the button bar.

   - To enable The email recipient to send an encrypted reply, the recipient needs to have your public key. You can send your public key as attachment. To do so, enable **Attach my public key**.
     You can also click on the **Options** menu ≡ in the button bar.

   - If **Show advanced settings** is enabled in the Guard settings, you can set the PGP format.
     Per default, encrypted emails are sent in **PGP Mime** format. Some older clients only support PGP Inline. If the recipient uses such a client, enable **Inline**.
     Note: If you use **Inline**, you can not send emails in html format.

3. Click on **Send**.

   When sending to new recipients, a window is displayed that allows to send notes for opening the encrypted email to the recipients.

User interface:

Related topics:

12.2.3 How can external recipients read an encrypted email?

You can also send encrypted emails to external recipients who are no groupware users. When adding an external recipient, Guard checks whether a public key is available for this email address. Depending on the result, Guard uses different procedures for sending the encrypted email:

- If there is a public key for the recipient:
  - The message will be sent encrypted using this key. The recipient can read the message with his/her private key.
- If there is no public key for the recipient:
  - If the external user already has a guest account, he/she will receive an email with the link to the login page of his/her guest account. When having logged in, he/she can read the encrypted email on the guest page. He/she can send an encrypted reply from this page.
  - If there is no guest account, a guest account will be created. The external recipient will receive an email with a link to a guest page and an automatically created password. The user logs in to the guest page. Then he/she can create an own password.
    Depending on the configuration, the automatically created password and the link to the guest page will be sent in separate emails.
  - Depending on the configuration, guest account emails will be deleted from the server after a specific number of days.
  The external recipient can send an encrypted reply to the encrypted email. It is not possible to add additional recipients though.

Related topics:

12.2.4 Encrypting incoming emails by using a filter rule

Depending on the configuration, you can automatically encrypt emails by creating a respective email filter.

How to automatically encrypt incoming emails:

1. Click the **Settings** icon ✛ on the right side of the menu bar. Click on **Settings**.

2. Click on **Mail** in the sidebar. Click on **Filter rules**.

3. In the display area, click on **Add new rule**. The *Create new rule* window opens.
   - Enter a rule name.
   - Click on **Add condition**. Make a selection from the drop-down menu. Complete the condition details.
   - Click on **Add action**. Select the encryption action from the menu. Complete the action details.

4. You can set whether subsequent rules are to be processed if the rule is met. To do so, enable or disable **Process subsequent rules**.

5. Click on **Save**.

Related topics:

12.3   Encrypting Email Conversations with Autocrypt

The Autocrypt standard has been developed to provide an automatic email encryption. This is done as follows:

- Each email sent includes the public key of the sender in the email header. This key will be imported automatically or manually by the recipient.

Autocrypt has the following limitiations:

- There is no check for automatically imported keys to see whether they are correct or a fake.

- For this reason, an automatically imported key is not used for verifying the sender's signature.

To manage Autocrypt keys and verify them later, you have the following options:

12.3.1 Importing Autocrypt keys

In the advanced Guard settings, you can define whether Autocrypt keys are automatically imported. You can set the following:

- All Autocrypt keys received are automatically imported.
An automatically imported key is used as follows:
  - An outgoing message to this contact can be encrypted with this key.
  - The signature of an incoming message from this contact will not be verified with the key. That means: It can not be verified if the sender is real and the message content has been transferred unaltered.
- For each Autocrypt key received you will be asked whether to import this key. Details of the Autocrypt key will be shown allowing you to check its validity. If you import the key, it will be regarded as verified. A verified key will be used as follows:
  - An outgoing message to this contact can be encrypted with this key.
  - The signature of an incoming message from this contact will be verified using the key. If the verification is successful, the sender is real and the message content is unaltered.

How to define how Autocrypt keys are imported:

1. Click the **Settings** icon ⊡ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Security**. Click on **Guard**.

3. Enable **Show advanced settings**. Items for managing keys and for the Autocrypt settings will be displayed.

4. Below **Autocrypt**, proceed as follows:
   - To import Autocrypt keys, enable **Search incoming emails for keys in header**.
   - If you enable **Import autocrypt keys without asking**, Autocrypt keys will be imported automatically. This is the default setting if **Show advanced settings** is disabled.
   - If you disable **Import autocrypt keys without asking**, you will be asked whether you want to import the key. The key details are shown so that you can check the validity of the key. If you accept the key, it will be regarded as verified.

Related topics:

12.3.2 Managing Autocrypt keys

The following options exist:

- Show a list of imported Autocrypt keys
  You can verify automatically imported Autocrypt keys later. A verified key will be used as follows:
  - An outgoing message to this contact can be encrypted with this key.
  - The signature of an incoming message from this contact will be verified using the key. If the verification is successful, the sender is real and the message content is unaltered.
- Delete Autocrypt keys

How to display the list of Autocrypt keys:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Security**. Click on **Guard**.

3. Enable **Show advanced settings**. Items for managing keys and for the Autocrypt settings will be displayed.

4. Click on **Autocrypt Keys** below **Keys**. The *Autocrypt Keys* window opens. It displays a list of Autocrypt keys.

   To show details, click on a key ID.

How to verify an Autocrypt key in the *Autocrypt Keys* window:

1. Verify a key by comparing its displayed fingerprint with the correct fingerprint. You get the correct fingerprint from the sender of the email the key was imported from.

2. To verify the key, enable **Verified**.

How to delete an Autocrypt key in the *Autocrypt Keys* window:

1. Click the **Delete** icon next to a key. 🗑

2. Confirm that you want to delete the key.

Related topics:

12.3.3 Transferring Autocrypt keys to other clients

To decrypt messages received on another email client and to sign outgoing messages, you have to copy your private keys to the other client. To do so, you can use the Autocrypt transfer service. The Autocrypt transfer service sends you an email with your private keys. This email is encrypted with a 36 digit code.

How to transfer your Autocrypt keys to another client:

1. Click the **Settings** icon ⊞ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Security**. Click on **Guard**.

3. Enable **Show advanced settings**. Items for managing keys and for the Autocrypt settings will be displayed.

4. Click on **Autocrypt Transfer Keys** below **Autocrypt**. The *Autocrypt Transfer Keys* window opens.

5. Enter your Guard password. Click on **Transfer**.

    A setup email with a passcode will be sent to your primary email address. The passcode will be displayed in the *Autocrypt Transfer Keys* window.

6. Open the setup email on the wanted email client. Enter the passcode.

Related topics:

12.4   Encrypting or Decrypting Files

The following options exist:

User interface:

12.4.1 Encrypting files

When encrypting a file, only the last version of this file will be encrypted. All other versions will be deleted.

How to encrypt a file:

> **Warning:** When encrypting a file, all versions of this file will be deleted, except for the current version. If you need to keep an older version, save it before encrypting the file.

1. Select one or several files in the display area of the Drive app.

2. Use one of the following methods:

  ▪ Click the **Actions** icon ☰ in the toolbar. Click on **Encrypt** in the menu.
  ▪ Select **Encrypt** from the context menu.
  ▪ Use the **More actions** icon ▤ in the Viewer. Click on **Encrypt** in the menu.

Related topics:

12.4.2 Uploading files securely by using encryption

You can upload local files securely by using encryption.

How to upload files securely by using encryption:

1. In the Drive app, open a folder in the folder view.

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

2. Click on **Upload** in the toolbar. Click on **File (encrypted)**.

3. Select one or several files in the *Upload file* window.

Click on **Open**. The current progress status will be shown in the display area.

In order to cancel the process, click on **File details** at the bottom right side of the display area. Click on **Cancel** next to a file name in the *Upload progress* window.

Tip: You can also upload a new encrypted file by dragging a file from your operating system's desktop to the Drive app window and drop it in the bottom part.

Related topics:

12.4.3 Opening encrypted files

You can open and read an encrypted file. The file remains encrypted on the server.

How to open an encrypted file:

1. In the Drive app, select an encrypted file in the display area. Click the **View** icon 👁 in the toolbar.

2. Enter your Guard security password in the *Password required* window.

    You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

    In the Guard security settings, you can define a default value for the time range.

Related topics:

12.4.4 Downloading encrypted files

You can download an encrypted file to locally read or edit it. The file remains encrypted on the server.

How to download an encrypted file:

1. In the Drive app, select an encrypted file in the display area. Click the **View** icon 👁 in the toolbar.

    Note: If you click on **Download** in the toolbar or context menu instead, the downloaded file remains encrypted.

2. Enter the Guard security password in the *Password required* pop-up window.

    You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

    In the Guard security settings, you can define a default value for the time range.

3. Click the **More actions** icon ▤ in the Viewer. Click on **Download Decrypted**.

Related topics:

12.4.5 Decrypting files

You can remove a file's encryption by decrypting the file.

How to decrypt a file:

1. In the Drive app, select an encrypted file in the display area.

2. Use one of the following methods:
   - Click the **Actions** icon ≡ in the toolbar. Click on **Remove Encryption**.
   - Select **Remove Encryption** from the context menu.

3. Enter the Guard security password in the *Password required* pop-up window.

   You can define how long the Guard security password should be valid. To do so, enable **Remember my password**. Select a value from the list.

   In the Guard security settings, you can define a default value for the time range.

Related topics:

12.5   Encrypting Office Documents

The following options exist:

-
-
-

Further functions are available in the Drive app:

- encrypt existing documents
- decrypt documents

12.5.1 Creating new encrypted documents

When creating a new document, you have the option to create a document that will be saved encrypted.. The following options exist:

- Create an encrypted document in the Text, Spreadsheet or Presentation app.
- Create an encrypted document on the document edit page.
  You can use this option if you are currently editing a document.

How to create a new encrypted document:

1. Depending on whether you want to create an encrypted text document, spreadsheet or presentation, launch the Text, Spreadsheet or Presentation app.

2. In the Office menu bar, click on one of the respective buttons **New text document (encrypted)**, **New spreadsheet (encrypted)**, **New presentation (encrytped)**.

3. Enter your Guard security password in the *Password required* window.

   You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

   In the Guard security settings, you can define a default value for the time range.

How to create a new encrypted document while editing a document:

1. Click on **New** in the **File** toolbar. In the menu, select one of those entries: **Text document (encrypted)**, **Spreadsheet document (encrypted)**, **Presentation document (encrypted)**.

2. Enter your Guard security password in the *Password required* window.

   You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

   In the Guard security settings, you can define a default value for the time range.

3. Click on **Unnamed** in the menu bar. Enter a name.

Related topics:

12.5.2 Saving selected documents in an encrypted format

When having opened a text document, spreadsheet or a presentation, you can save this document in an encrypted format.

How to save the selected document in an encrypted format:

1. Open a document in the Text, Spreadsheet or Presentation app.

2. In the **File** toolbar, click on **Save in Drive**. Select **Save as (encrypted)**.

   The *Save as (encrypted)* window opens. Select a folder and a file name. Click on **OK**.

3. If the *Enter Guard security password* window opens, enter the Guard security password.

   You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

   In the Guard security settings, you can define a default value for the time range.

Related topics:

12.5.3 Opening an encrypted document

You can open an encrypted document to do the following:

- read or edit the document
- download the document in decrypted format
- print the document as pdf in decrypted format

The document remains encrypted on the server.

How to open an encrypted document:

1. Open a document in the Text, Spreadsheet or Presentation app.

2. Enter your Guard security password in the *Password required* window.

    You can define how long the security password should be remembered by Guard. To do so, enable **Remember my password**. Select a value from the list.

    In the Guard security settings, you can define a default value for the time range.

3. You can use the following functions:

    - Edit the document. Information can be found in the Documents user guide.
    - To download the document in a decrypted format, click the **Download** icon ⤓ in the **File** toolbar.
    - To save the document as pdf in a decrypted format, click the **Print as PDF** icon 🖨 in the **File** toolbar.

Related topics:

Creating new encrypted documents (p. 295)
Saving selected documents in an encrypted format (p. 296)
Encrypting or Decrypting Files (p. 290)

12.6   Signing Out from Guard

You can sign out from Guard without closing the groupware. To open an encrypted email or file after having signed out, you have to re-enter the Guard security password.

Note: This function is only available if you enable **Remember Password** when opening an encrypted email or file.

How to sign out from Guard:

1. Click the **My account** icon on the right side of the menu bar.
2. Click on **Sign out Guard**.

12.7   Guard Settings

How to use the Guard settings:

1. Click the **Settings** icon ⚙ on the right side of the menu bar. Click on **Settings**.

2. In the sidebar, click on **Security**. Click on **Guard**.

The *Guard security settings* page will be displayed.

The following settings are available:

Default settings

▪ **Default to send encrypted when composing email**
Defines whether a new email is encrypted by default.

▪ **Default adding signature to outgoing mails**
Defines whether a new email is encrypted per default.

▪ **Default to using PGP inline for new mails**
Defines whether the PGP encryption is done inline as default. Only use those settings if the email client of a recipient does not support PGP. With PGP inline, the recipient can decrypt the message nevertheless. If you use this setting, you can not send emails in html format.

▪ **Remember password default**
Defines the time range default for Guard to remember the password. You can change this default when being asked for your Guard password.

Password management

Contains functions for changing or resetting the password.

See Password management (p. 301)

Advanced

▪ **Advanced settings**
If **Show advanced settings** is enabled, the following settings and functions will be available.

  ▫ **Email cache**
  Defines whether a decrypted email is kept in the browser cache in a readable format when displaying another email or changing to another groupware app.
  To remove the decrypted email from the browser cache, enable **Do not keep emails decrypted.**.

  ▫ **Keys** section
  Managing own keys, public keys or Autocrypt keys.
  See Keys (p. 300)

  ▫ **Autocrypt** section
  Configures the usage of Autocrypt for incoming emails. Allows you to transfer Autocrypt keys to other clients.
  See Encrypting Email Conversations with Autocrypt (p. 286)

  ▫ When sending encrypted emails, there are additional options.
  See Sending encrypted emails (p. 284)

Keys
Usually, the key management functions are not required for sending or receiving encrypted messages. Those functions can be useful though under the following circumstances:

- You want to use your Guard PGP keys in other E-Mail clients, e.g. in local E-Mail clients.
- You have PGP keys from other PGP applications. You want to use those keys in Guard.
- You have an external partner's public key. In order to send encrypted messages to this external partner or verify received signed messages without having to access a key server, you want to import the partner's public key into Guard.
- You want to provide your public key to an external partner in order to allow the external partner to send encrypted messages to you without the need to access a key server.

The following options exist:

- **Download my public key button**
  Locally saves your public key.
- **Your keys button**
  Opens the *Your Keys* window for managing your own keys.
- **Public keys of recipients button**
  Opens the *Your Keys* window for managing public keys.

12.7.1 Password management

On the *Guard security settings* page, you can:

- Change the Guard security password
- When having lost your Guard security password, you can request a temporaryGuard security password by resetting the Guard security password.
- Defining an email address for resetting the password.
- To be able to reset your password if needed, your password has to be saved on the server in an encrypted version. If you do not want your password to be saved on the server, you can delete the password recovery.

Note: Depending on the configuration, some of those functions might not be available.

Encrypting Data with Guard

How to change the Guard password:

1. Click on **Change password**. The *Change password* window opens.

2. In the **Enter current Guard security password** field, enter the password that you have used so far for encrypting your data.

   In the **Enter new Guard security password** field, enter the password that you want to use for encrypting your data from now on.

   Confirm the password in the **Verify new Guard security password** field by entering it again.

3. Click on **Change**.

How to reset the Guard password:

1. Click on **Reset password**. The *Reset password* window opens.

   Click on **Reset**.

2. A new password will be sent to your secondary email address.

   If not having entered a secondary email address, the new password will be sent to your primary email address.

   This new password is now your current Guard security password. You should immediately change this password.

How to change your secondary email address for resetting the password:

1. Click on **Set email address for reset**. The *Secondary Email Address* window opens.

2. In the **Enter current Guard security password** field, enter the password for encrypting your data.

   In the **Enter new secondary email** field, enter the email address that is used for receiving a temporary password for resetting your Guard security password.

   Re-enter the email address in **Verify email address**.

   Click on **Change email address**.

How to remove the function for resetting the password:

Warning: If you remove the function for resetting the password, you can no longer reset your password. if you forget your password afterwards, there will be no possibility to decrypt your encrypted emails or files.

1. Enable **Show advanced settings**.

   Click on **Delete password recovery**. The *Delete Recovery* window opens.

2. Click the **Delete** button.

Related topics:

12.7.2   Managing own keys

On the *Guard security settings* page, you can:
- display own keys, display details
- add new keys
  If you own several keys, you can define which key should be the current one. The current key is used for encrypting data.
- add user IDs
  When adding additional user IDs to a key, you can use the key for multiple email accounts.
- download keys
- delete keys

How to display your own keys or make a key the current one:

1. Enable the **Show Advanced Settings** checkbox below **Advanced**.
   Click on **Your keys** below *Keys*. The *Your Keys* window opens.
   - Your existing keys are displayed. Each key consists of a master key and a subkey.
     - Among other things, the master key is used for signing your emails.
     - The subkey is used for encrypting and decrypting emails and files.
   - Depending on the requirement, Guard automatically uses the master key or the subkey.

2. If your key list contains more than one key, you can define the current key. To do so, enable the **Current** checkbox next to the main key. From now on, the current key will be used for encryption.

3. To display details for a key, click the **Details** icon 🔍 next to a key. The *Key Details* window opens. To view the key's signatures, click on **Signatures**.

How to add a new key in the *Your Keys* window:

1. Click the **Add** icon ➕ next to *Keys on Server*. The *Adding Keys* window opens.

2. You have the following options:
   - To add a private key, click on **Upload Private Key**. Select a file containing a private key. The *Upload Private Keys* window opens.
     To upload the new key, enter your Guard security password. Enter a new password for the new key.
   - To add a public key, click on **Upload Public Key Only**. Select a file containing a public key.
   - To create a new key pair, click on **Create New Keys**. The *Create Guard Security Keys* window opens.
     Enter a password for the new key. Confirm the password.
     The new key consists of a master key and a corresponding subkey.

   The new key will be entered on top of your key list. The new key becomes the current key.

How to add an additional user ID in the *Your Keys* window:

1. Click the **Edit** icon ✎ next to a key. The *Add User ID* window opens.

2. Enter a name for the user ID. Enter the email address that you want to use for this key.
   Enter your password for this key.

How to download a key in the *Your Keys* window:

1. Click the **Download** icon ⬇ next to a key.

2. Define whether to download your private key only, your public key only or both keys.
   Caution: Your private key will be downloaded in encrypted form. You should not download your private key to a publicly accessible system, though.

How to delete a key in the *Your Keys* window:

   Warning: If you delete a private key, you can no longer decrypt objects that have been encrypted with this key. If you are unsure, you should not delete the key but revoke it. A revoked key can no longer be used for encryption. But you can still decrypt objects that have been encrypted with this key.

1. Click the **Delete** icon 🗑 next to a key. The *Delete Private Key* window opens.

2. You have the following options:
   - To revoke a private key, click on **Revoke**.
     if you revoke a key, it will no longer be used. But you can still decrypt objects that have been encrypted with this key. For this reason, revoking a key is better than deleting it.
     Enter the password for the private key. If required, select a reason for revoking the key.
     Click on **Revoke**.
   - In order to delete a private key, click on **Delete**.
     Warning: If you delete a private key, you can no longer decrypt objects that have been encrypted with this key.
     Enter the password for the private key.
     Click the **Delete** button.

   When deleting a master key, the corresponding subkey will be deleted too.

Related topics:

12.7.3 Managing public keys

On the *Guard security settings* page, you can:
- display public keys
- upload public keys
- delete an own public key

How to show public keys:

1. Enable the **Show advanced settings** checkbox below **Advanced**.

   Click on **Public keys of recipients** below **Keys**. The *Puplic Keys* window opens.

   The public keys shared by you or other users are displayed. If a user's public key is displayed in this list, you can send an encrypted email to this user and verify signed emails that have been sent to you by this user.

2. To display details for a key, click the **Details** icon 🔍 next to a key. The *Public Keys Detail* window opens.

   You can share public keys by enabling **Share key**. Other users can view and download your shared keys. Public keys are only available for groupware users.

How to upload a recipient's public key in the *Public Keys* window:

Click the **Add** icon ✚ next to *PGP Public Key List*. Select a file containing a public key.

How to delete a public key in the *Public Keys* window:

Click the **Delete** icon 🗑 next to a public key.
Confirm that you want to delete the public key.

Related topics:

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