Groupware

User Guide

Groupware: User Guide

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1 About This Documentation

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

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

1.1 Who is the Target Group for this Documentation?

This documentation is addressed to the end user.

1.2 Which Contents are Included in the Documentation?

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

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

1.3 Design Elements

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

Buttons

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

Example:

Click on **Compose new email**.

Label

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

Example:

The *Compose new email* page is displayed.

Key labels

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

Example:

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

Links

Links in the text appear in blue.

Example:

Information can be found in 5.4: Sending E-Mails (page 56).

Explanatory text

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

Example:

The following options exist:

- Send new E-Mails
- Reply to E-Mails.
- Forward E-Mails.

Step by step instructions

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

Example:

How to reply to an E-Mail:

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

Result: The E-Mail is sent.

Tips for making the work much easier

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

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

Example:

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

Malfunction note

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

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

Example:

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

Warning about loss of data or security risks

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

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

Example:

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

1.4 Terminology

This documentation uses the following terms.

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

in an E-Mail thread have the same subject. The current E-Mail corresponds to the last reply.

1.5 Further Help

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

2 Getting Started with the Groupware

The following information will help you get started with the groupware.

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

2.1 Groupware Definition

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

Portal

Your information centre for scheduled appointments, new E-Mails or messages from messaging platforms.

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

Learn more [41].

E-Mail

Send, receive and organize your E-Mails.

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

Learn more [47].

Address Book

Organize and maintain your private and business contacts.

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

Learn more [77].

Calendar

Keep an overview of your private and business appointments.

- Use individual or recurring appointments to schedule meetings and activities.
- Use calendar folders to organize appointments. Specify the team members who can access selected calendars.
- 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 [95].

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 [123].

Editor

Create and edit simple text files.

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

Learn more [169].

Drive

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

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

Learn more [141].

Folders and permissions

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

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

Learn more [173].

2.2 System Requirements

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

Resolution/screen size

The minimum display resolution is 1024 x 768.

Browser

- Microsoft Internet Explorer 10, 11, Edge
- Mozilla Firefox, latest version
- Apple Safari on Mac OS X, current version
- Google Chrome, latest version

Browser settings

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

2.3 Operating Instructions

The following techniques are required:

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

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

2.4 Signing in, Signing out

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

How to sign in to the server:

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

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

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

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

How to sign out:

1. Click the **System menu** icon. Click on **Sign out**. The login window will be displayed.

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

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

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

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

3 First Steps

What you initially should do.

- Get familiar with the common user interface.
- Get familiar with the keyboard input.
- Customize the basic settings.
- Check your personal contact data. Change or complete it, if required.
- For security reasons you should change your password.
- In order to access social network contacts, you need to set up accounts for social networks.
- In order to access your groupware data from local clients or apps, you can install clients or apps for workstations or mobile devices. Depending on the groupware configuration, you have the following options:
    - manually download and install clients and apps
    - use a wizard to set up clients and apps

3.1 The User Interface

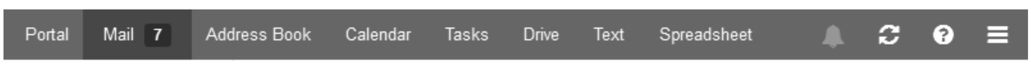
The user interface includes the following components:

- A menu bar on the top.

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

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

Menu bar



Contains the following icons and buttons:

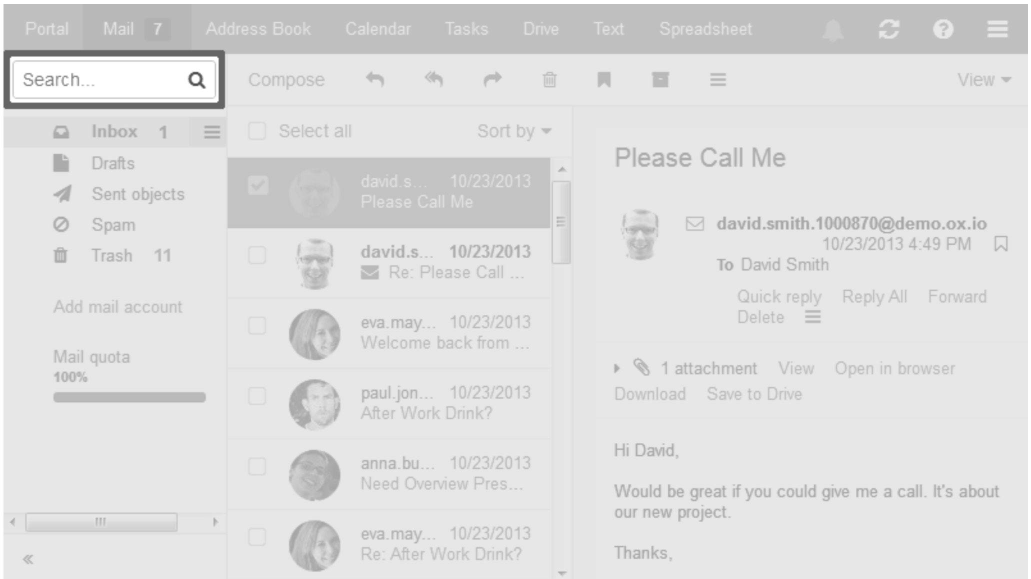
- Buttons for launching applications like *E-Mail* or *Calendar*

  Next to the **E-Mail** button, the number of unread E-Mails in your personal E-Mail folders are displayed.
- Depending on the action, additional buttons might be displayed e.g., if composing a new E-Mail or editing an appointment.
- **Unread Badge** icon . The icon notifies you of the number of new objects e.g., unread E-Mails or scheduled appointment invitations. Clicking opens the notification area .
- **Refresh** icon . Reloads objects from the server. Irrespective of this function, objects are refreshed in regular intervals.
- **Help** icon . Opens a context related help page. Depending on the current app, the respective help page from the online help is displayed. You can also open the online help from the system menu.

  Tip: Some dialog windows also include the help icon. If clicking on it, the respective help for the dialog window context is displayed.
- **System menu** icon . Opens a menu with the following entries:
  - *Settings*. Opens a page that allows customizing settings.
  - *My contact data*. Opens a window where you can adjust your personal contact data in the global address book.
  - *Help*. Opens the online help.
  - *Sign out*. Signs you out from the groupware.

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

Search bar

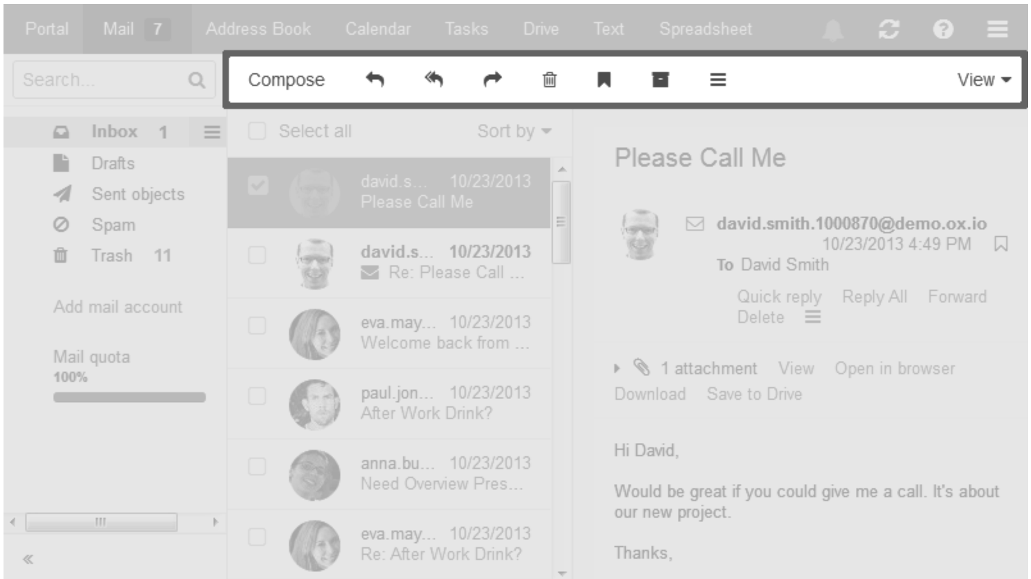


In order to display the search bar, click on **View** in the toolbar. Enable **Folder view**. The search bar is located on the left side below the menu bar. It contains the following:

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

The search result is displayed in the display area.

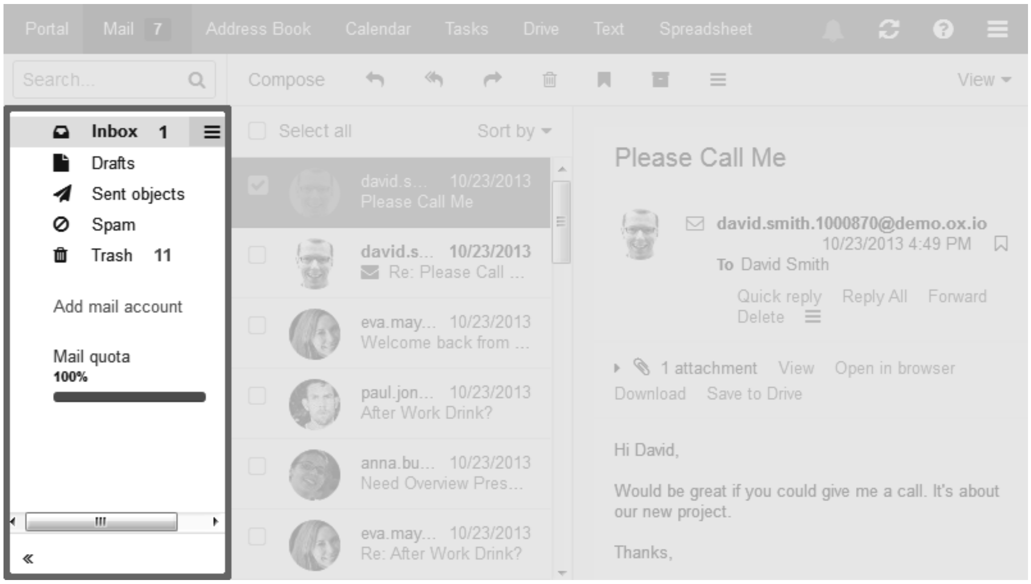
Toolbar



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

- Buttons for creating new objects, e.g. a new E-Mail or a new contact.
- 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 tree.

Folder tree



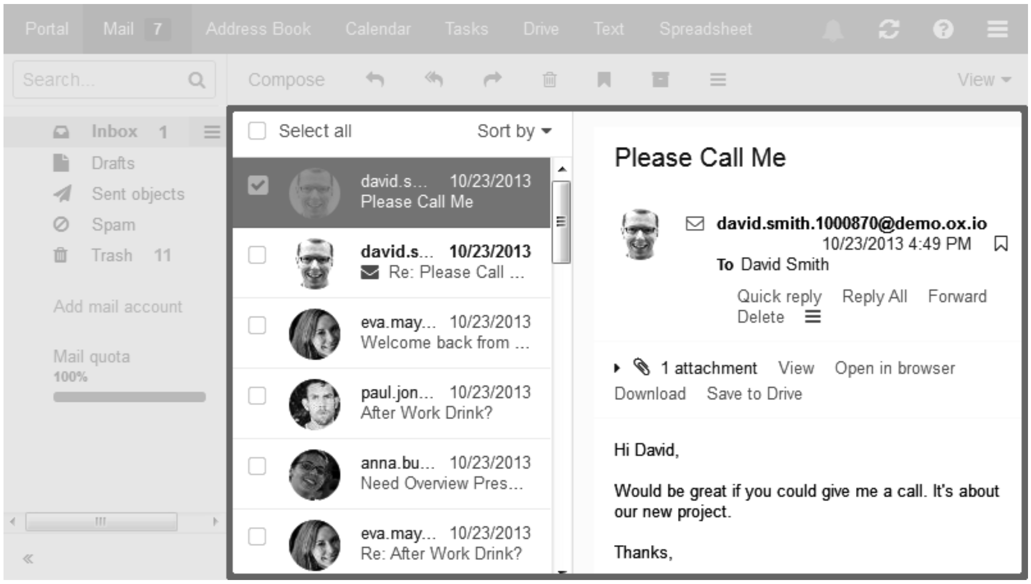
In order to display the folder tree, click on **View** in the toolbar. Enable **Folder view**. The following information are displayed in the folder tree:

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

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

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

Display area

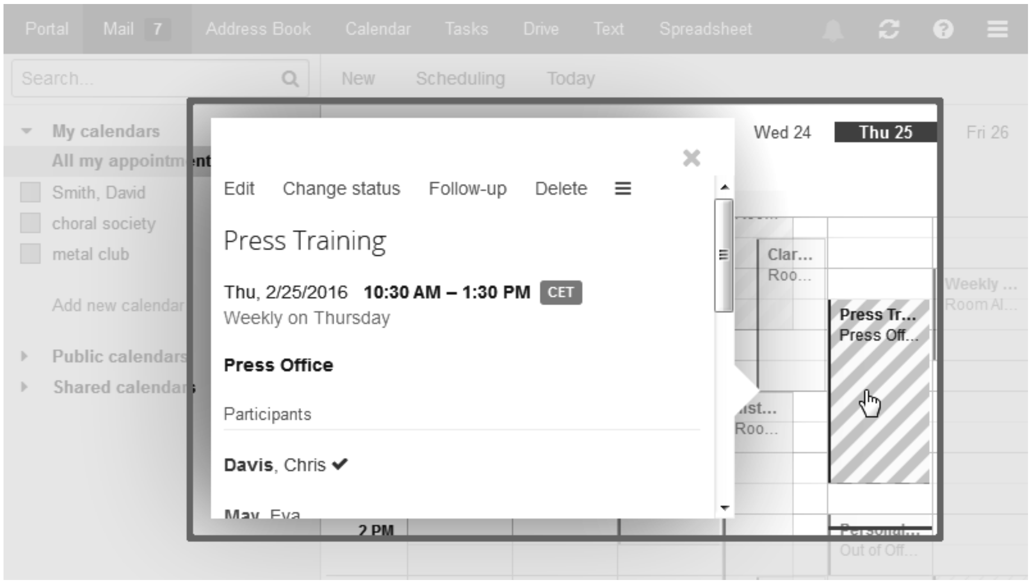


Depending on the app, the display area includes the following components.

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

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

Pop-up

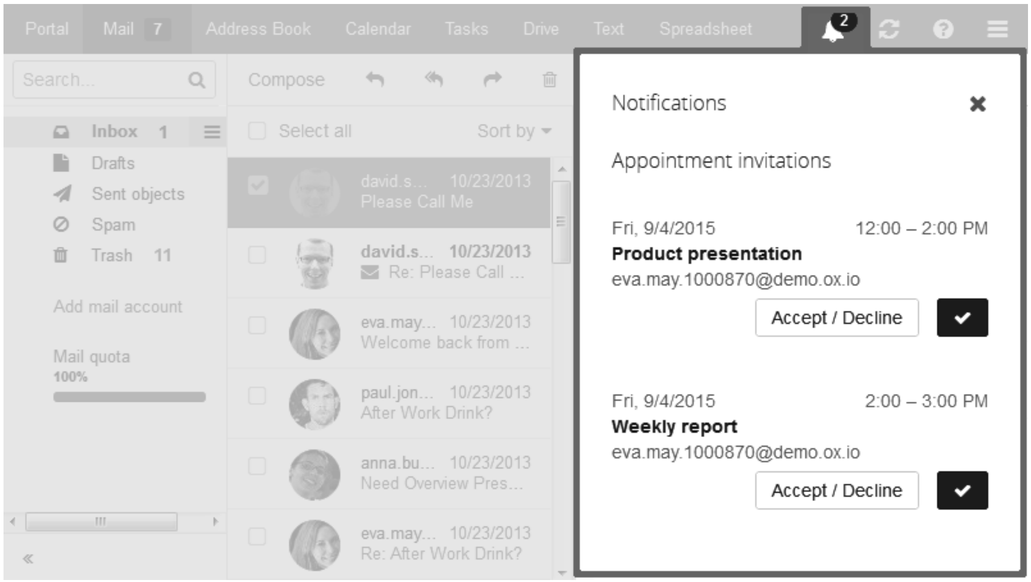


Shows an object's details. In order to open the pop-up, click on a groupware object in the display area. If you read an E-Mail in the display area and click on the name of the sender, the following elements are displayed in the pop-up:

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

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

Notification area



Displays information about the following objects:

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

In order to open the notification area, click the **Unread badge** icon on the right side of the group. You can do the following:

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

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

3.2 Keyboard Input

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

- To switch between the menu bar, the folder tree, the sidebar, and the display area, use [Ctrl]+[F6] on Windows and Linux systems, [F6] on MacOS systems.
- To move the cursor within input fields, use the following keys: cursor keys, [Home], [End].
- To browse the folder tree or the sidebar, use the following keys: [Page up], [Page down].
- To open or close a folder in the folder tree, use the left or right arrow key.
- To select elements in the folder tree, in the sidebar or in the display area, use the cursor keys.
- To select a function, an input field or a checkbox, use the [Tab] key. The selected element will be highlighted.

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

Instructions that show how to use the keyboard control:

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

How to use the keyboard to send a new E-Mail:

1. If the *E-Mail* app is not launched, do the following:

   Repeatedly press [Ctrl]+[F6] or [F6] on Mac OS systems to highlight the menu bar.

   Press [Tab] to highlight *E-Mail* in the menu bar.

   Press [Enter]. The *E-Mail* app will be launched.
2. Repeatedly press [Tab] until the **Compose** button is highlighted. Press [Enter]. The *Compose new mail* page opens. The input field *To:* is enabled.
3. Enter the recipient's E-Mail address. Press [Enter].
4. Press [Tab]. The input field *Subject* is enabled. Enter the subject.
5. The input field for the E-Mail text is enabled. Enter the E-Mail text.
6. In order to send the E-Mail, press [Tab]. The **Send** button is highlighted. Press [Enter]. The E-Mail is sent.
7. To add attachments, repeatedly press [Tab] until the **Add attachment** function is highlighted. Press [Enter].

   A 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 E-Mail is sent.

How to use the keyboard to reply to an E-Mail:

1. If the *E-Mail* app is not launched, do the following:
   Repeatedly press [Ctrl]+[F6] or [F6] on Mac OS systems to highlight the menu bar.
   Press [Tab] to highlight *E-Mail* in the menu bar.
   Press [Enter]. The *E-Mail* app will be launched.
2. Repeatedly press [Ctrl]+[F6] or [F6] on Mac OS systems to highlight a folder in the folder tree. Use the cursor keys to select the desired folder. To view or hide a subfolder, use the left or right arrow key.
3. If the desired folder is highlighted, repeatedly press [Tab], until an E-Mail is highlighted in the sidebar.
4. Use the cursor keys to select the desired E-Mail.
5. To reply to the E-Mail, repeatedly press [Tab] or [Shift]+[Tab] , until the **Reply to sender** function is highlighted. Press [Enter] to activate the function.

3.3 Customizing the Basic Settings

How to customize the basic settings:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Basic settings** in the sidebar.
3. Change the settings [33].

The following settings are available.

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

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

Language

Defines the user interface language.

Timezone

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

Refresh interval

Defines the interval for retrieving new objects from the server.

Theme

Defines the color scheme for the user interface.

High contrast theme

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

Default app after sign in

Defines the application that is displayed after login.

Automatic sign out

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

Automatic opening of notification area

Specifies whether the notification are is automatically opened when receiving a new notification or E-Mail.

Show desktop notifications

Defines whether you will receive a desktop notification for new E-Mails.

My contact data button

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

Change password

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

3.4 Changing Personal Contact Data

How to change your personal contact data:

1. Click the **System menu** icon on the right side of the menu bar. Click on **My contact data** in the menu.

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

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

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

3.5 Changing the Password

How to change your password:

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

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

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

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

3.6 Setting up Accounts for Social Networks

How to set up an account for accessing social networks:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the sidebar, click on **Accounts**.
3. Click on **Add account** in the display area. Select a social network from the menu. You will be directed to the social network page where you are asked for your credentials.

   Note: The menu only displays social services for which you have not set up an account in the groupware yet.
4. Enter your credentials for the social network account. In order to finish the process, click on the respective button.

Tip: You can also use the Portal Widgets [45] to set up an account for accessing social networks.

3.7 Manually Downloading and Installing Clients and Apps

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

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

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

How to install clients for workstations or mobile devices:

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

3.8 Using a Wizard to Set Up Clients and Apps

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

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

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

How to use the wizard:

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

4 Portal

Learn how to work with the *Portal* application.

- The *Portal* Components
- customize the contents

How to launch the *Portal* app:

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

4.1 The *Portal* Components

The portal includes the following components.

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

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

Signed in as

Displays the username that you used for signing in.

Add widget button

Clicking on this opens a menu that allows adding [45] new widgets.

Customize this page button

Clicking on this displays a page that allows customizing [45] the Portal.

***Appointments* widget**

Displays your current appointments. You can do the following:

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

***Inbox* widget**

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

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

***Tasks* widget**

Shows unfinished tasks. You can do the following:

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

***Recently changed files* widget**

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

***User data* widget**

Includes links for the following functions:

- Changing your personal contact data
- Changing your password

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

***Quota* widget**

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

***News* widgets**

Display current messages from different message sources:

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

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

Widgets with *news from your social networks*

Show current information from own social networks.

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

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

Widgets with information about Drive apps

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

4.2 Customizing the Portal

The following options exist:

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

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

4.2.1 Changing the widgets' order

You can define the order of the widgets.

How to change the order of the widgets:

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

4.2.2 Removing Portal widgets

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

How to remove a widget:

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

4.2.3 Adding Portal widgets

You can extend the existing widgets by adding new ones.

How to add new widgets:

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

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

4.2.4 Adding a Portal widget for social networks

There are the following options:

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

How to add a widget for accessing social networks:

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

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

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

4.2.5 Changing the Portal widgets' settings

How to use the Portal widgets settings:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Portal** in the sidebar.
3. Change the settings [46].

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

The following settings are available.

- **Edit** button
- **Color** button
- **Disable** button
- **Delete** icon
- **Reduce to widget summary** checkbox

Edit button

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

Color button

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

Disable button

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

Delete icon

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

Reduce to widget summary checkbox

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

5 E-Mail

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

- The *E-Mail* Components
- display E-Mails
- send E-Mails
- organize E-Mails
- search for E-Mails
- share E-Mails with other *users*
- access your external mail accounts that you have set up with other providers
- use the *E-Mail* settings

How to launch the *E-Mail* app:

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

5.1 The *E-Mail* Components

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

- Search bar
- Folder tree
- Toolbar
- Display area
  - List
  - Detail view
- View for composing or editing

Search bar

Enables you to search for E-Mails

Folder tree

Displays the E-Mail folders. Enables you to navigate the folder structure. In order to open the folder tree, click on the **View** button in the toolbar. Enable **Folder view**. Depending on the groupware configuration, the folder tree contains the following entries:

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

The following functions are available:

- To display the number of E-Mails in a folder, hover over the folder name. A tooltip shows the number of E-Mails.
- If clicking on a folder, its E-Mails are displayed.
- The **Folder-specific actions** icon next to the selected folder offers functions for organizing data and app specific folder functions.
- Below the folders there's a button for adding E-Mail accounts.
- Depending on the groupware's configuration, additional buttons are available below the folders. Those buttons allow to launch a wizard to configure various clients.

Related topics

Information on folders can be found in Folders (p. 174).

Instructions for frequently used actions can be found here:
Navigating within the folder structure (p. 174), Creating folders (p. 176), Renaming folders (p. 176), Moving folders (p. 176), Deleting folders (p. 176), Setting up and editing E-Mail accounts (p. 73)

Toolbar

Contains the following:

- **Compose** button. Creates a new E-Mail.
- **Reply to sender** icon . Sends a reply.
- **Reply to all recipients** icon . Sends a reply to all recipients.
- **Forward** icon . Forwards the E-Mail to other recipients.
- **Delete** icon . Deletes the E-Mails selected by you.
- **Set color** icon . Opens a menu allowing you to assign a colored label to the E-Mail.
- **Archive** icon . Archives the E-Mails selected by you.
- **Actions** icon . Opens a menu with further functions:

  Note: When having selected an E-Mail conversation, some functions are not available in the toolbar.
- **View** button. Opens a menu with checkboxes for controlling the view.
  - **Vertical**. Vertically aligns the E-Mail list and an E-Mail's detail view. The functions for selecting and sorting are displayed below the toolbar.
  - **Compact** checkbox. Vertically aligns the E-Mail list and an E-Mail's detail view. The functions for selecting and sorting are displayed next to the toolbar.
  - **Horizontal**. Horizontally aligns the E-Mail list and an E-Mail's detail view.
  - **List** checkbox. Shows the list of E-Mails. To display the detail view click on an E-Mail.

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

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

Related topics

Instructions for the buttons and icons can be found here:
Sending a new E-Mail (p. 56), Replying to E-Mails (p. 58), Forwarding E-Mails (p. 59), Deleting E-Mails (p. 65), Categorizing E-Mails with colored labels (p. 63), Archiving E-Mails (p. 65)

Instructions for the functions in the **Actions** menu can be found here:
Marking E-Mails as read or unread (p. 62), Moving E-Mails (p. 61), Copying E-Mails (p. 62), Printing E-Mails (p. 64), Saving E-Mails (p. 64), Showing the E-Mail source (p. 63), Creating E-Mail reminders (p. 63), Adding an E-Mail to the portal (p. 64)

Display area

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

List

Displays a list of the E-Mails in the current folder. The list contains the following entries:

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

The following functions are available:

- You can select multiple E-Mails to edit them at once. To do so enable the checkboxes next to the E-Mails by enabling the **Checkboxes** option from the **View** drop-down in the toolbar.

  You can also use your system's multi selection functions.
- In order to select all visible E-Mails in the currently selected folder, enable the **Select all** checkbox above the list.

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

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

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

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

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

Related topics

Displaying E-Mails (p. 54), Replying to E-Mails (p. 58), Forwarding E-Mails (p. 59), Organizing E-Mails (p. 61)

Detail view

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

- Subject

  If the E-Mail is part of a conversation, the number of E-Mails in this conversation is displayed. To open or close all E-Mails in the conversation, click the **Open/close all messages** icon . If clicking on a free area between the sender and the date of receipt, the E-Mail opens or closes.
- A picture of the sender, if available.
- Depending on the groupware configuration, a colored dot next to the name indicates the Messenger status of the sender or a recipient.
- **Read** icon . If clicking the icon, the status will be changed from Read to Unread and vice versa.
- The sender's name. The recipient's name. The names of additional E-Mail recipients, if existing. If clicking on a name, a *pop-up* opens. It displays information about the contact.
  - The person's contact data.
  - If the person's contact data are saved, the location of the data is displayed.
  - If you exchanged E-Mails with this person, they are displayed below *Recent conversations*.
  - If you share appointments with this person, they are displayed below *Shared appointments*.
  - Information about this person from social networks. You can use the available buttons to open this person's profile.
- Date and time of the receipt.
- **Set color** icon . Opens a menu allowing you to assign a colored label to the E-Mail.
- Buttons for frequently used functions: **Quick reply**, **Reply all**, **Forward**, **Delete**
- **Actions** icon . Clicking on it opens a menu with editing functions that can be used as an alternative to the toolbar's editing functions.
- If the E-Mail contains attachments, further elements are displayed:
  - A button with the **Attachment** icon and the number of attachments. If clicking on it, the attachments are displayed as icons or list.
  - Buttons that allow to apply a function [55] to all E-Mail attachments at once.
  - The **Squares** icon or **List** icon . If clicking the icons, the attachments are shown as squares or as list. To apply a function [55] to a specific attachment, click on the attachment's name in the List view.
- E-Mail text

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

Related topics

Viewing or Saving E-Mail Attachments (p. 55), Replying to E-Mails (p. 58), Forwarding E-Mails (p. 59), Inviting all E-Mail recipients to an appointment (p. 72), Saving all recipients of an E-Mail as a distribution list (p. 72), Organizing E-Mails (p. 61)

View for composing or editing

When composing a new E-Mail or editing an E-Mail draft, the following elements are displayed on a new page.

- **Send** button. When having completed the required input, click on this button to send the E-Mail.
- **Save** button. If clicking on this button, the current E-Mail content is saved in the *Drafts* folder.
- **Discard** button. In order to cancel the process, click on this button. In the next dialog window, you can choose between some options.
- Your sender address is displayed next to **From**. Depending on your groupware account's settings, you can choose between various sender addresses. In order to select another sender address, click on the address.
- **To** input field. Enter one or several recipients in this field. While entering the recipients, matching suggestions are displayed. To accept a suggestion, click on it.

  To send a copy to other recipients, click on **CC** or **BCC** on the right side of the input field. Enter the addresses of the recipients of the copy or the blind copy in the matching input fields.
- **Subject** input field. Enter your E-Mail's subject in this field.
- **Attachments** button. Click on this button to add local files or files that are saved in the *Drive* app.
- **Signatures** button. Let's you define whether to add a signature to the E-Mail text. Click on the button to select or remove a signature. In the E-Mail settings you can create or edit signatures.
- **Options** button. Click on this button to set specific options: The E-Mail's text format, priority, read receipt.
- Input field for the E-Mail text. Enter the text in the field. If having selected the html format from the **Options**, you can format the text or add images.

Related topics

Sending a new E-Mail (p. 56), Working with E-Mail drafts (p. 63)

5.2 Displaying E-Mails

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

How to display an E-Mail:

1. Open an E-Mail folder in the folder tree.
2. In order to select a layout, click on **View** in the toolbar. Enable an entry below *Layout*.
3. To sort the E-Mail list, click on **Sort by** above the list. Enable an entry.

   Note: To reduce latency when loading the E-Mail list, only a certain percentage of the E-Mails in a folder will be loaded by the server if their number exceeds a defined limit. If browsing to the bottom of the list, the next part will be loaded.

   To combine all E-Mails of a conversation in a single list entry, enable the **Conversations** checkbox in **Sort by**.
4. Click an E-Mail in the list. The content of the E-Mail will be displayed in the detail view.
   - If the E-Mail is part of a conversation, all E-Mails in the conversation are displayed one below the other. To open or close an E-Mail that is part of a conversation, click on a free area between the sender and the date of receipt.

     To open or close all E-Mails in the conversation, click the **Open/close all messages** icon on the upper right side of the detail view.
   - If the E-Mail includes a quote from a previous E-Mail, you can display the quote by clicking the **Show quoted text** icon .
   - When having selected **Vertical**, **Compact** or **Horizontal** from the **View** drop-down in the toolbar, you can open an E-Mail in a separate window by double-clicking on the E-Mail in the list.
   - When having selected **List** from the **View** drop-down in the toolbar, the display area contains a list of all E-Mails in the folder. If clicking on an E-Mail, the E-Mail's detail view is displayed. The following functions are available bove the detail view, :

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

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

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

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

Tip: You can also search for E-Mails.

Similar actions

Viewing or Saving E-Mail Attachments (p. 55), Showing the E-Mail source (p. 63)

5.3 Viewing or Saving E-Mail Attachments

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

- displaying the attachment in the *Viewer*
- opening the attachment in a new tab
- downloading the attachment
- saving the attachment to *Drive* [141]

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

How to use the E-Mail attachment functions:

1. Select an E-Mail with one or multiple attachments.
2. To do so, open the detail view and click on one of the buttons **View**, **Open in browser**, **Download**, **Save to Drive**.

   If there are multiple attachments, the function is applied to all attachments.
3. In order to apply a function to a specific attachment, click the **Attachment** icon . Below the icon, the names of the attachments are displayed. Click on an attachment's name. Select a function from the menu.

   In order to view an attachment's preview, click the Squares icon on the right side. The attachments are displayed as squares. Click on a square.

5.4 Sending E-Mails

The following options exist:

- Sending a new E-Mail
- Replying to E-Mails
- Forwarding E-Mails
- Automatically forwarding E-Mails
- Sending a vacation notice
- Creating and managing signatures

5.4.1 Sending a new E-Mail

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

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

How to send a new E-Mail:

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

   If there are several recipients, repeat the action. As an alternative, you can enter the name of a distribution list [86].

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

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

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

   Tip: You can define that the recipients can only see your E-Mail address, not your full name. To do so, proceed as follows:

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

   Enable **Hide names**.
3. Enter a subject.
4. Enter the E-Mail text.

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

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

   Select the text content.

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

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

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

   In order to remove an image from the text, select the image. Press the delete key on your keyboard.
6. You can use additional functions: send copies, select sender address, add attachments, add signature, add vCard, request delivery receipt or set the priority
7. Click on **Send**.

Result: The E-Mail is sent.

Similar actions

How to use further functions when composing an E-Mail: (p. 58), Replying to E-Mails (p. 58), Forwarding E-Mails (p. 59), Automatically forwarding E-Mails (p. 59), Sending a vacation notice (p. 59)

How to use further functions when composing an E-Mail:

Prerequisite: The *Compose* page is selected.

1. If you have set up external E-Mail accounts [73], you can use those addresses as sender addresses. To do so, proceed as follows:

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

   Select an E-Mail address from the list.

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

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

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

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

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

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

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

   If the recipients are not to see who gets a copy of the E-Mail, click on **BCC** on the right side of the *To* field. Enter the E-Mail address of the blind copy's recipient in the **BCC** field.

   Tip: With drag and drop you can move the recipients between the fields *To*, *CC* and *BCC*.

   If there are several recipients, you can enter the name of a distribution list [86].

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

   In order to use the current version of a file from the *Drive* app as an attachment, click on **Attachments**. Click on **Add from Drive**. Open a folder in the *Add attachments* windows. Select one or several files. Click on **Add**.

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

   In order to hide or show the attachments click on the button with the attachment icon.

   Tip: You can also add an attachment by dragging one or several files from a file browser or from the desktop to the E-Mail window and dropping them below the **Attachments** button.

   Note: Depending on the groupware configuration, attachments will not be sent when having reached a certain size limit. In this case the attachment is saved in a folder below your personal files folder. The E-Mail includes a link to the attachment.

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

   Click on **Signatures**.

   Select a signature from the list.

5. In order to show further options, click on **Options**. You can use the following options:

   set the priority

   attach your vCard

   request a delivery receipt

5.4.2 Replying to E-Mails

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

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

How to reply to an E-Mail:

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

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

5.4.3 Forwarding E-Mails

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

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

How to forward an E-Mail:

1. Select an E-Mail.
2. Click the **Forward** icon in the toolbar.
   You can also use the **Forward** button in the detail view.
3. Select one or more recipients. Information can be found in How to send a new E-Mail: (page 57).
4. Enter the E-Mail text. You can use additional functions e.g., E-Mail attachments.
5. Click on **Send**.

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

5.4.4 Automatically forwarding E-Mails

You can let E-Mails be automatically forwarded to another address.

How to automatically forward E-Mails:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select the entry **E-Mail** in the sidebar. Click on **Auto Forward**.
3. Enter the E-Mail address to which you want to forward the messages.
4. Enable **Enabled**.
5. In order to keep a copy of the E-Mail, enable **Keep a copy of the message**.

5.4.5 Sending a vacation notice

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

- the subject and text of the vacation notice
- the time frame when the vacation notice is to be sent

How to create and activate a vacation notice:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select the entry **E-Mail** in the sidebar. Click on **Vacation Notice**.
3. Enter a subject and a text for the vacation notice.
4. Specify an interval for sending a vacation notice if there are several E-Mails from the same sender.
5. Specify a time frame when the vacation notice is to be sent. **Note:** Depending on your installation, this option might not be available due to some reasons. In this case, contact your administrator or host.
6. Activate the vacation notice by enabling at least one address under *Enabled for the following addresses*.

Tip: In order to deactivate the vacation notice, disable the E-Mail address under *Enabled for the following addresses*.

Tip: The vacation notice is entered as E-Mail filter [68]. You can also edit the vacation notice in the E-Mail filter settings.

5.4.6 Creating and managing signatures

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

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

How to create a new signature:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select the entry **E-Mail** in the sidebar. Click on **Signatures**.
3. In the display area, click on **Add new signature**. The *Add signature* window opens.
4. Enter a name for the signature.

   Enter the text for the signature. In order to format the text, select single text contents and click on an element in the formatting bar.

   Define whether the signature is to be entered below or above the E-Mail text.
5. Click on **Save**.

How to manage existing signatures:

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

5.5 Organizing E-Mails

Some of the techniques for organizing contacts require that contact folders have already been set up by you. Information on creating folders can be found in Folders (page 174).

The following options exist:

- Moving E-Mails
- Copying E-Mails
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- Collecting addresses
- Categorizing E-Mails with colored labels
- Showing the E-Mail source
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- Archiving E-Mails
- Deleting E-Mails
- Cleaning up E-Mail folders
- Editing multiple E-Mails at once
- Using Unified Mail
- Using E-Mail filters

5.5.1 Moving E-Mails

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

How to move an E-Mail:

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

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

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

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

Tip: In order to move all E-Mails from a folder, select at least two E-Mails from the list. Click on **Move all messages to another folder** in the detail view.

5.5.2 Copying E-Mails

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

How to copy an E-Mail:

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

1. Select an E-Mail.
2. Click the **Actions** icon in the toolbar. Select **Copy** from the menu.
   You can also use the **Actions** icon in the detail view.
3. Select a folder in the *Copy* window. Click on **Copy**.

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

5.5.3 Marking E-Mails as read or unread

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

- marking single E-Mails as read or unread
- mark all E-Mails of an E-Mail folder as unread

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

1. Select an E-Mail.
2. Click the **Actions** icon in the toolbar. Click on **Mark as unread** in the menu. If the E-Mail is part of a conversation, all messages received for this conversation are marked as unread.
   You can also use the **Actions** icon or click the **Read** icon in the detail view. The icon changes to the **Unread** icon .
3. In order to mark this E-Mail as read, analogously do the same.

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

How to mark all E-Mails of a folder as read:

1. Select an E-Mail folder in the folder tree.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Mark all E-Mails as read**.

5.5.4 Collecting addresses

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

- Automatically collect new E-Mail addresses when sending or reading E-Mails by activating this function in the E-Mail settings.
- Manually adding E-Mail addresses to an address book

How to manually add an E-Mail address to an address book:

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

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

5.5.5 Categorizing E-Mails with colored labels

You can categorize an individual E-Mail or a complete E-Mail conversation with a colored label.

How to categorize an E-Mail with a colored label:

1. Select an E-Mail.
2. Click the **Set color** icon in the toolbar. Select a color from the menu.
   You can also use the **Set color** icon in the detail view.

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

Tip: You can also mark multiple E-Mails at once with a colored label.

5.5.6 Showing the E-Mail source

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

How to display the E-Mail source:

1. Select an E-Mail.
2. Click the **Actions** icon in the toolbar. Select **View source** from the menu. The source is displayed in the *View source* window.
   You can also use the **Actions** icon in the detail view.

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

5.5.7 Working with E-Mail drafts

The following options exist:

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

How to save an E-Mail as a draft:

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

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

How to send a saved E-Mail draft:

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

5.5.8 Creating E-Mail reminders

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

How to create an E-Mail reminder:

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

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

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

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

5.5.9 Adding an E-Mail to the portal

You can add an E-Mail as widget to the Portal.

How to add an E-Mail to the portal:

1. Select an E-Mail.
2. Click the **Actions** icon≡ in the toolbar. Click on **Add to portal** in the menu.

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

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

5.5.10 Saving E-Mails

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

How to save an E-Mail:

1. Select an E-Mail.
2. Click the **Actions** icon≡ in the toolbar. Select **Save as file** from the menu.

   You can also use the **Actions** icon≡ in the detail view.
3. Follow the instructions for saving the EML file.

5.5.11 Importing E-Mails

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

How to import an E-Mail:

1. Open the E-Mail folder to which you want to import the E-Mail.
2. Drag the EML file from a file browser or from the desktop to the *E-Mail* app window. Drop the EML file in the list in the display area.

5.5.12 Printing E-Mails

In order to print E-Mails, you can do the following:

- print an E-Mail's content

How to print an E-Mail's content:

1. Select an E-Mail. Click the **Actions** icon in the toolbar. Click on **Print** in the menu. A window with a print preview opens.

   You can also use the **Actions** icon in the detail view.
2. If required, change the printer settings. Click on the **Print** button.
3. Close the print preview window.

Tip: You can also print the contents of multiple E-Mails at once.

5.5.13 Archiving E-Mails

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

- Archive a folder's E-Mails that are older than 90 days.
- Archive single E-Mails.

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

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

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

How to archive single E-Mails:

1. Select one or several E-Mails.
2. Click the **Archive** icon in the toolbar.

   You can also use the [a] key.

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

5.5.14 Deleting E-Mails

The following options exist:

- Delete individual E-Mail messages or entire E-Mail conversations. By default, the E-Mails are moved to the Trash folder.
- Delete all E-Mails of an E-Mail folder. By default, the E-Mails are moved to the Trash folder.
- Recover deleted E-Mail messages from the Trash.
- Permanently delete E-Mail messages from the trash. Permanently deleted E-Mails messages are irrevocably lost. You can also permanently delete all E-Mails from the trash by emptying the trash.

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

How to delete E-Mail messages:

1. Select an E-Mail.
2. Click the **Delete** icon in the toolbar.

   You can also use the [Del] or [Backspace] key.

   You can also use the **Delete** button in the detail view.

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

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

How to delete all E-Mails of a folder:

1. In the folder tree, select the folder which E-Mails you want to delete.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Empty folder**.
   You can also select two or more E-Mails from the list. Click on **Delete all messages** in the detail view.

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

How to recover deleted E-Mails:

1. Select the *Trash* folder in the folder tree.
2. Select an E-Mail.
3. Click the **Actions** icon in the toolbar. Select **Move** from the menu.
4. Select a folder in the *Move* window. Click on the *Move* button.

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

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

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

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

Result: The E-Mail is permanently deleted.

How to permanently delete the content of the Trash folder:

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

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

Result: The objects in the trash are permanently deleted.

5.5.15 Cleaning up E-Mail folders

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

How to clean up an E-Mail folder:

1. In the folder tree, select the folder that you want to clean up.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Clean up**.

Result: E-Mails that you deleted in an external E-Mail client, are removed from the folder.

5.5.16 Editing multiple E-Mails at once

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

- forwarding E-Mails
- moving or copying contacts to another folder
- marking E-Mails as read or unread
- Categorizing E-Mails with colored labels
- Deleting E-Mails
- printing E-Mails
- saving E-Mails as file

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

1. Use one or several of the following methods to at least select 2 E-Mails:
   If no checkboxes are displayed next to the E-Mails in the list, click on **View** in the toolbar. Enable **Checkboxes**.
   Check the boxes for at least two E-Mails.
   You can also use your system's multi selection functions.

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

   Note: The **Select all** checkbox only selects all visible E-Mails in a folder. To reduce latency when loading the E-Mail list, only a certain percentage of the E-Mails in a folder will be loaded by the server if their number exceeds a defined limit. If browsing to the bottom of the list, the next part will be loaded.
2. Select a function from the toolbar.

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

5.5.17 Using Unified Mail

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

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

The following functions are available:

- To use Unified Mail enable the function for one or several E-Mail accounts.
- You can display E-Mails in the *Unified Mail* folder.

How to activate Unified Mail for an E-Mail account:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the sidebar, click on **Accounts**.
3. Click on **Edit** next to an external E-Mail account in the display area. The settings are displayed in a pop-up.
4. Enable **Use Unified Mail for this account**.

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

How to display E-Mails in the *Unified Mail* folder:

1. Open the *Unified Mail* folder in the folder tree.
2. As an alternative, click on a subfolder of the *Unified Mail* folder.

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

5.5.18 Using E-Mail filters

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

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

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

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

A rule contains:

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

The following options exist:

- Creating a new rule.
- Changing existing rules.

Some E-Mail functions automatically set up filters, e.g. the vacation notice [59].

How to create a new rule:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select the entry **E-Mail** in the sidebar.
   Click on **Filter rules**.
3. In the display area, click on **Add new rule**. The *Create new rule* window opens.
4. Enter a name for the rule.
5. In order to add a condition click on **Add condition**. Make a selection from the drop-down menu. Please note the following:

   In order to use an E-Mail part that is not contained in the list, select **Header**. Enter a header entry in the *Name* input field. You can display an E-Mail's header by Viewing the source data [63].

   In order to consider the *BCC* part, select **Envelope - To**. Envelope includes the E-Mail recipients entered in the *To*, *CC* or *BCC* field.

   In order to use a part of the E-Mail content in the condition, select **Content**.

   In order to use the date of receipt in the condition, select **Current Date**.

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

   Examples can be found in the Questions about E-Mails.

   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**.

   To delete a condition, click the **Delete** icon next to the condition.
6. Specify the action to be executed if the rule is met. To do so, click on **Add action**. Select an action from the menu. Depending on the action, further details might be required.
   You can add further actions.
7. You can set whether subsequent rules are to be processed if the rule is met. To do so, enable or disable **Process subsequent rules**.
8. Click on **Save**.

How to change existing rules:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select the entry **E-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.

5.6 Searching for E-Mails

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

- search terms for subject, E-Mail text, sender or recipients
- Search terms for a time range. Searches for E-Mails 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

How to search for E-Mails:

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

2. To select a folder for the search, click on the folder button.
   - If you select **All folders**, all folders and subfolders of the internal E-Mail account are searched.
   - If you select a specific folder or the folder of an external E-Mail account, only this folder is searched, but no subfolders.

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

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

   Result:

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

   For each search result, the folder with the found object is displayed. To finish the search and display the folder content, click on the folder.

4. You have the following options to adjust the search result:
   - If using a person's name as search term, you can define whether to search for the name in the sender, recipient or in both. To do so, click the icon next to the name.
   - To refine the search result, enter further search terms: To remove a search term, click the icon next to the search term.
   - To search in another folder, click on the folder button.

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

5.7 E-Mails within a Team

The following options exist:

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

5.7.1 Sharing E-Mails

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

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

5.7.2 Subscribing to E-Mail folders

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

How to subscribe to shared E-Mail folders:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **E-Mail** in the sidebar.
3. At the bottom of the display area click on **Change IMAP subscription**.
4. In the *Subscribe IMAP folders* window activate the checkboxes of the folders that you want to subscribe to. Click on **Save**.

5.7.3 Inviting all E-Mail recipients to an appointment

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

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

1. Select an E-Mail.
2. Click the **Actions** icon in the detail view.
   Select **Invite to appointment** from the menu.
3. Complete the details for creating an appointment [107].

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

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

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

1. Select an E-Mail.
2. Click the **Actions** icon in the detail view.
   Select **Save as distribution list** from the menu.
3. Complete the data for Creating a distribution list [86].

5.8 E-Mail Accounts

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

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

5.8.1 Setting up and editing E-Mail accounts

The following options exist:

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

How to set up an external E-Mail account:

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

Now you can use the external E-Mail account.

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

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

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

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the sidebar, click on **Accounts**.
3. Click on **Edit** next to an account in the display area. The settings are displayed in a pop-up.
4. Change the settings.
   Note: If you enter a name in the **Your name** field of the *Account settings*, this name overwrites the preset sender name.
5. Click on **Save** at the bottom of the pop-up.

How to delete an external E-Mail account:

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

5.8.2 Using external E-Mail accounts

The following options exist:

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

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

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

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

Tip: If you enabled *Unified Mail* for the external E-Mail account, you will also see the E-Mails in the *Unified Mail* folder. Information can be found in Using Unified Mail (page 67).

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

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

1. In the folder tree, open the folder with the name of the external E-Mail account.
2. Click on **Compose new email**.
3. Fill in the required fields for sending an E-Mail [56]. Click on **Send**.

5.9 E-Mail Settings

How to use the general E-Mail settings:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **E-Mail** in the sidebar.
3. Change the settings [75].

The following settings are available.

- Permanently remove deleted emails
- Automatically collect contacts in the "Collected addresses" folder while sending E-Mails
- Automatically collect contacts in the "Collected addresses" folder while reading E-Mails
- Use fixed-width font for text mails
- Ask for mailto link registration
- Append vcard
- Insert the original E-Mail text into a reply?
- Forward E-Mails as
- Format emails as
- Default sender address
- Auto-save email drafts
- Allow HTML formatted E-Mail messages?
- Allow pre-loading of externally linked images
- Color quoted lines
- Show requests for read receipts
- Change IMAP subscriptions

Permanently remove deleted emails

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

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

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

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

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

Use fixed-width font for text mails

Specifies whether a fixed-width font is used when composing a plain text E-Mail.

Ask for mailto link registration

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

Append vcard

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

Insert the original E-Mail text into a reply?

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

Forward E-Mails as

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

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

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

Format emails as

Defines the format in which E-Mails are sent:

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

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

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

Default sender address

Specifies the pre-set sender address for new E-Mails.
Note: The sender's name is displayed in front of the E-Mail address. If you enter a name in the **Your name** field of the E-Mail Accounts settings [73], this name overwrites the preset sender name.

Auto-save email drafts

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

Allow HTML formatted E-Mail messages?

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

Allow pre-loading of externally linked images

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

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

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

Color quoted lines

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

Show requests for read receipts

Defines whether a return receipt is displayed if a received E-Mail includes receipt confirmation request.

Change IMAP subscriptions

Contains functions for subscribing [72] to E-Mail folders.

6 Address Book

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

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

How to launch the *Address Book* app:

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

6.1 The *Address Book* Components

The *Address Book* app includes the following components.

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

Search bar

Enables you to search for contacts.

Folder tree

Displays the contacts folders Enables you to navigate the folder structure. In order to open the folder tree, click on the **View** button in the toolbar. Enable **Folder view**. Depending on the groupware configuration, the folder tree contains the following entries:

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

The following functions are available:

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

Related topics

Information on folders can be found in Folders (p. 174).

Instructions for frequently used actions can be found here:
Navigating within the folder structure (p. 174), Creating folders (p. 176), Renaming folders (p. 176), Moving folders (p. 176), Deleting folders (p. 176)

Toolbar

Contains the following:

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

  Note: This function is only enabled if you opened an address book for which you have the appropriate permissions to create objects.
- **Send mail** button. Sends an E-Mail to the contact.
- **Invite** button. Invites the contact to an appointment.
- **Edit** button. Edits the contact's data.
- **Delete** button. Deletes the contacts selected by you.
- Depending on the groupware configuration, the **Messenger**
- **Actions** icon . Opens a menu with further functions:

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

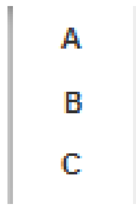
  Note: Depending on the address book or the contact's data, some buttons might be sorted differently or might not be available.
- **View** button. Opens a menu with checkboxes for controlling the view.
  - **Folder view** checkbox. Opens or closes the folder tree.
  - **Checkboxes** checkbox. Displays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

Related topics

Instructions for the buttons and icons can be found here:
Creating a new contact (p. 85), Sending E-Mails from within an address book (p. 87), Inviting contacts to an appointment (p. 87), Editing contacts (p. 87), Deleting Contacts (p. 89)

Instructions for the functions in the **Actions** menu can be found here:
Sending contacts as vCard (p. 88), Printing Contacts (p. 89), Moving Contacts (p. 88), Copying Contacts (p. 88), Adding contacts as Xing contacts (p. 88)

Navigation bar



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

Display area

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

List

Displays the names of the contacts in the opened address book. The list contains the following entries:

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

The following functions are available:

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

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

  In order to select all contacts in the currently selected folder, enable the **Select all** checkbox above the list.
- If clicking on a contact, its data is displayed in the detail view.

Related topics

Searching for Contacts (p. 90), Editing multiple contacts at once (p. 89)

Detail view

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

- Picture, name, job position, profession
- Depending on the groupware configuration, a colored dot next to the name indicates the Messenger status of the contact.
- Business and private addresses
- Business and private phone numbers
- E-Mail addresses. If clicking on an E-Mail address, a page for sending a new E-Mail opens.

The extent of information displayed can vary.

View for creating or editing

When composing a new contact or editing an existing contact, the following elements are displayed on a new page.

- **Save** button. If clicking on this button, the current contact data are saved and the editing page is closed.
- **Discard** button. In order to cancel the creation or editing, click on this button.
- **Show all fields** checkbox. Per default, only the data fields that are most frequently used are displayed. In order to display all available data fields, enable this checkbox.
- **Personal information** input fields. Enter the title, name, birthday, and additional personal data.

  If you enable the checkbox **Display all fields** on top of the page, additional elements are displayed.

  - Input fields for the middle name, name extension, url.
  - **This contact is private** checkbox. If the contact is not to be displayed when its folder is being shared, enable this checkbox.
- **Job description** input fields. Enter the contact's business data in those fields.

  If you enable the checkbox **Display all fields** on top of the page, additional input fields are displayed.
- Input fields **Messaging**, **Phone and fax numbers**. Enter E-Mail addresses, other messaging addresses, phone numbers and fax numbers in those fields.

  If you enable the checkbox **Display all fields** on top of the page, additional input fields are displayed.
- **Home address** input fields. Enter the contact's private address in those fields.

  If you enable the checkbox **Display all fields** on top of the page, the input fields **Business address** and **Additional address** are displayed.
- **Comments** input field. Use this field to enter information.
- If you enable the checkbox **Display all fields** on top of the page, additional data fields for individual entries are displayed below **Custom fields**.
- **Add attachments** button below **Attachments**. Click on this button to attach one or several files to the contact data.

Related topics

This view is used for the following actions:
Creating a new contact (p. 85), Editing contacts (p. 87)

6.2 Displaying Contacts

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

How to display a contact:

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

Tip: You can also search for contacts.

Similar actions

Viewing or Saving Contact Attachments (p. 83), The Halo View (p. 84)

6.3 Viewing or Saving Contact Attachments

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

- displaying a preview of the attachment
- opening the attachment in the browser
- downloading the attachment
- saving the attachment to *Drive* [141]

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

How to use the contact attachment functions:

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

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

6.4 The Halo View

The halo view opens a popup with all relevant information on a contact:

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

How to display a contact in the halo view:

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

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

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

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

6.5 Adding Contacts

The following options exist:

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

6.5.1 Creating a new contact

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

How to create a new contact:

1. Open an address book in the folder tree.
   Note: Open an address book for which you have the appropriate permissions to create objects.
2. Click on **New** in the toolbar. Click on **Add contact**.
3. Enter the data.
   A description of the input fields can be found in View for creating or editing (page 81).
4. To add an attachment to the contact, click on **Add attachments** below *Attachments*. Select one or multiple files.
   In order to remove an attachment, click the **Delete** icon .
   Tip: You can also add an attachment by dragging and dropping a document from a file browser or from the desktop to the contacts window.
5. Click on **Save**.

Similar actions

Creating distribution lists (p. 86), Adding a contact from vCard (p. 85), Importing contacts from files (p. 85), Importing contacts from social networks (p. 85)

6.5.2 Adding a contact from vCard

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

How to add a contact from an E-Mail's vCard attachment:

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

6.5.3 Importing contacts from files

Information on importing contacts from various files can be found in Importing Data (page 188).

6.5.4 Importing contacts from social networks

You can import the contacts from your social networks to a contacts folder by subscribing to the contacts. Information can be found in Subscribing to data (page 184)

6.6 Creating distribution lists

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

How to create a new distribution list:

1. Open an address book in the folder tree.

   Note: Open an address book for which you have the appropriate permissions to create objects.
2. Click on **New** in the toolbar. Click on **Add distribution list**.
3. Enter a name for the distribution list in the **Name** field.
4. Enter a participant's E-Mail address in the *Participants* field.

   Tip: While entering the E-Mail address, several matching suggestions are displayed. To accept a suggestion, use one of the following methods:
   - Use the scrollbar to browse the list. Click on a suggestion.
   - Use the cursor keys to select a suggestion. Press Enter.

   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**.

6.7 Organizing contacts

Some of the techniques for organizing contacts require that contact folders have already been set up by you. Information on creating folders can be found in Folders (page 174).

The following options exist:

- Sending E-Mails from within an address book
- Inviting contacts to an appointment
- Editing contacts
- Moving Contacts
- Copying Contacts
- Sending contacts as vCard
- Adding contacts as Xing contacts
- Inviting contacts to Xing
- Printing Contacts
- Deleting Contacts
- Editing multiple contacts at once

6.7.1 Sending E-Mails from within an address book

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

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

1. Select a contact or a distribution list from the list.
2. Click on **Send mail** in the toolbar.
3. Fill in the details for sending a new E-Mail.

6.7.2 Inviting contacts to an appointment

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

How to invite contacts to an appointment:

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

6.7.3 Editing contacts

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

How to edit a contact:

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

1. Select a contact from the list.
2. Click on **Edit** in the toolbar. The contact's data is displayed.
3. Edit the data.
   A description of the input fields can be found in View for creating or editing (page 81).
4. Click on **Save**.

6.7.4 Moving Contacts

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

How to move a contact to another folder:

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

1. Select a contact from the list.
2. Click the **Actions** icon≡ in the toolbar. Select **Move** from the menu.
3. Select a folder in the *Move* window. Click on **OK**.

Tip: In order to move contacts using drag and drop, select a contact or multiple contacts in the list. Drag the selected contacts to a folder in the folder tree. Drop them there.

6.7.5 Copying Contacts

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

How to copy a contact to another folder:

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

1. Select a contact from the list.
2. Click the **Actions** icon≡ in the toolbar. Select **Copy** from the menu.
3. Select a folder in the *Copy* window. Click on **OK**.

6.7.6 Sending contacts as vCard

You can send a contact or multiple contacts at once as vCard attachment to an E-Mail.

How to send a contact as vCard attachment:

1. Select a contact from the list.
2. Click the **Actions** icon≡ in the toolbar. Click on **Send as vCard** in the menu.
3. Fill in the details for sending a new E-Mail [56].

6.7.7 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 **Actions** icon≡ in the toolbar. Click on **Add to Xing** in the menu.

6.7.8 Inviting contacts to Xing

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

How to invite a contact to Xing:

1. Select a contact from the list.
2. Click the **Actions** icon≡ in the toolbar. Click the menu entry **Invite to Xing**.

6.7.9 Printing Contacts

In order to print contacts you can:

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

6.7.10 Deleting Contacts

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

How to delete a contact:

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

1. Select a contact from the list.
2. Click on **Delete** in the toolbar.
3. Confirm that you want to delete the contact.

Result: The contact is deleted.

6.7.11 Editing multiple contacts at once

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

- sending an E-Mail to multiple contacts
- Inviting contacts to an appointment
- moving or copying contacts to another folder
- sending contacts as vCard attachment
- printing multiple contacts
- Deleting Contacts

How to apply a function to multiple contacts at once:

1. Use one or several of the following methods to at least select 2 contacts:
   If no checkboxes are displayed next to the contacts in the list, click on **View** in the toolbar. Enable **Checkboxes**.
   Check the boxes for at least two contacts.
   You can also use your system's multi selection functions.
   In order to select all contacts, enable the **Select all** checkbox above the list.
2. Select a function from the toolbar.

6.8 Searching for Contacts

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

- search terms for name, E-Mail address, phone number, address
- Folders that are to be searched
- Type: all, contact, distribution list
- Folder type: all, private, public, shared

How to search for contacts:

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

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

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

   Result:
   The search results are displayed in the list that is shown in the display area.
4. You have the following options to adjust the search result:
   - To refine the search result, enter further search terms: To remove a search term, click the icon next to the search term.
   - To search in another folder, click on the folder button. Select a folder.
   - To limit the search to private, public or shared folders, click on **Options**. Select a folder type.
   - To limit the search to contacts or distribution lists, click on **Options**. Select a type.
5. In order to finish the search, click the **Cancel search** icon.

6.9 Contacts in Teams

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

- The *Global address book* provides the contact data for all users. Each user can use those contacts.
- To make additional contacts available for internal users or external partners, proceed as follows:
  Create a new personal or public folder where you can copy or move the wanted contacts to.
  Share this folder.
  You can also share an existing folder.
- If another internal user shared a contact folder with you, you can access this folder in the folder tree.

6.10 Interchanging Contacts with Other Applications

The following options exist:

- export [193] contacts to use them in other applications
- import [188] contacts that you created in other applications

6.11 Address Book Settings

How to use the address book settings:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Address Book** in the sidebar.
3. Change the settings [93].

The following settings are available.

- Display of names

Display of names

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

7 Calendar

Learn how to work with the *Calendar* application.

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

How to launch the *Calendar* app:

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

7.1 The *Calendar* Components

The *Calendar* app includes the following components.

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

Search bar

Enables you to search for appointments.

Folder tree

Displays the calendar folders. Enables you to navigate the folder structure. In order to open the folder tree, click on the **View** button in the toolbar. Enable **Folder view**. Depending on the groupware configuration, the folder tree contains the following entries:

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

The following functions are available:

- If clicking on a calendar, appointments within that calendar are displayed.
- The **Folder-specific actions** icon next to the selected calendar offers functions for organizing data, for exchanging data and for selecting a calendar color.

  Note: The color selection drop down and the color icons next to the folder names are only displayed if **Custom colors** is enabled in the **View** menu in the toolbar.
- Buttons in the folder tree offer functions for creating calendars.
- The **All my appointments** folder contains all your appointments from all calendars.
- Depending on the groupware's configuration, additional buttons are available below the folders. Those buttons allow to launch a wizard to configure various clients.

Related topics

Information on folders can be found in Folders (p. 174).

Instructions for frequently used actions can be found here:
Using calendar colors (p. 112), Navigating within the folder structure (p. 174), Creating folders (p. 176), Renaming folders (p. 176), Moving folders (p. 176), Deleting folders (p. 176)

Toolbar

Contains the following elements in the calendar views:

- **New** button. Creates a new appointment.
- **Scheduling** button. Opens the scheduling view for scheduling appointments with multiple participants.
- **Today** button. Selects the time frame with the current day.
- **View** button. Opens a menu with checkboxes for controlling the view.
    - **Day**, **Work week**, **Week** or **Month** checkbox. Allows to select a calendar view.
    - **List** checkbox. Activates the list view.
    - **Folder view** checkbox. Opens or closes the folder tree.
    - Checkboxes for selecting the appointment colors.
        - **Classic colors**. Displays the appointments in light colors.
        - **Dark colors**. Displays the appointments in dark colors.
        - **Custom colors**. You can define the color in which an appointment is displayed.
    - If the list view is set: **Checkboxes** checkbox. Displays a checkbox next to each appointment in the list. This allows to select multiple appointments to edit them at once.
    - **Print** button. Opens the print preview for printing a calendar sheet.

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

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

Related topics

Instructions for the buttons and icons can be found here:
Creating Appointments (p. 107), Scheduling appointments with several participants (p. 118), Editing appointments (p. 111), Changing the appointment status (p. 112), Deleting appointments (p. 114)

Instructions for the functions in the **Actions** menu ≡ can be found here:
Printing appointments (p. 113), Moving appointments to another folder (p. 113), Editing multiple appointments at once (p. 114)

Display area

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

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

Displays the calendar view for the selected time range.

- The **Browse** icons on the top left side of the calendar sheet allow to go back or forth within the calendar.
- In the calendar views *Day*, *Work week*, and *Week*, the date and calendar week are displayed next to the **Browse** icon.

  If clicking on a date, a mini calendar opens that helps you select another date.

  The area between the date and the calendar sheet can be used for creating [107] all-day appointments.

  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.

  The red line in the calendar sheet displays the current time.
- In the *Work week*, *Week* and *Month* views the current day in the calendar sheet is highlighted with a red background.
- In the *Month* view, the selected month and the year are displayed above calendar sheet.
- Depending on the confirmation status and the color theme, the appointments are highlighted with different colors [104].

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

Related topics

Viewing Appointments (p. 103), How are appointments displayed? (p. 104), Creating Appointments (p. 107), Managing Appointments (p. 111)

Pop-up

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

- Buttons **Edit**, **Change status**, **Follow-up**, **Delete**.

  Note: Depending on the server configuration, the following limitations might prevail: Some buttons for appointments in your private calendars are only displayed if you have the respective permissions for executing the function. If you are a participant, you can not change or delete the appointment. If you are the organizer, you can not change your status.
- If clicking the **Actions** icon a menu with further functions opens.

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

Related topics

Instructions for the buttons and icons can be found here:
Editing appointments (p. 111), Changing the appointment status (p. 112), Creating follow-up appointments (p. 108), Deleting appointments (p. 114)

Instructions for the functions in the **Actions** menu can be found here:
Printing appointments (p. 113), Moving appointments to another folder (p. 113), Editing multiple appointments at once (p. 114)

List

Displays a list of appointments in the currently selected folder. The list contains the following entries:

- 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.
- The text above the list contains the name of the selected folder. The number corresponds to the number of objects in the selected folder.

The following functions are available:

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

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

  In order to select all appointments in the currently selected folder, enable the **Select all** checkbox above the list.
- If clicking the **Sort** icon above the list, a menu opens that allows to sort appointments.

Related topics

Searching for Appointments (p. 115), Editing multiple appointments at once (p. 114)

Detail view

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

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

  If clicking on an appointment or an E-Mail, an additional pop-up opens.
- Depending on the groupware configuration, a colored dot next to the name indicates the Messenger status of the participant.
- If the appointment has other participants, the following buttons are displayed: **Send E-Mail to all participants** [117], **Invite to new appointment** [117], **Save as distribution list** [118]
- Names of existing resources. If clicking on a resource a *pop-up* opens.
- If the appointment includes external participants, their names are displayed below *External participants*.
- If clicking on **Details**, further information are displayed:
  - the appointment's organizer
  - availability
  - which folder
  - who created the appointment and when
  - who was the last person to modify the appointment

Related topics

Instructions for the buttons and icons can be found here:
Editing appointments (p. 111), Changing the appointment status (p. 112), Deleting appointments (p. 114)

Instructions for further actions can be found here:
Printing appointments (p. 113), Moving appointments to another folder (p. 113), Editing multiple appointments at once (p. 114)

View for creating or editing

When composing a new appointment or editing an existing appointment, the following elements are displayed on a new page.

- **Create** button. If clicking on this button, the current appointment data are saved and the editing page is closed.
- **Discard** button. In order to cancel the creation or editing, click on this button.
- The button next to **Calendar** shows the calendar folder in which the appointment will be created. To create the appointment in another calendar folder, click on this button.
- **Subject** input field. Enter the subject in this field. The subject is displayed as appointment title in the views.
- **Location** button. Here, you can enter the location where the appointment is to take place.
- **Starts on** and **Ends on** input fields. Set the start and end date of the appointment. If clicking on it, a dialog for selecting the date opens.

  If the **All day** checkbox is disabled, you can set start and end times.

  If clicking on the timezone button next to the time, the time is displayed in different time zones. You can set frequently used time zones as favorites in the calendar settings.
- **All day** checkbox. Enable this checkbox if the appointment is to last the whole day.
- **Find a free time** button. Opens the scheduling view. In this view, you can find a free time when scheduling an appointment with several participants.
- **Repeat** checkbox. Enable this checkbox if the appointment is to be repeated. Additional control elements for setting the recurring parameters are displayed. Examples can be found in the questions about appointments and tasks.
- **Description** input field. You can enter a description for the appointment in this field.
- **Reminder** drop-down menu. Defines when to be reminded of the appointment by an entry in the info area.
- **Shown as** drop-down menu. Defines your availability during the appointment duration. If there are overlapping appointments, you will get a conflict message, unless the availability is set to **Free**. Examples can be found in the Calendar questions and answers.
- When having selected **Custom colors** in the **View** menu in the toolbar, a color selection field is displayed. Clicking on a color field defines the appointment's color. If clicking on the first color field, the appointment gets the color if its calendar.
- **Private** checkbox. Enable this checkbox if other users are not to see the appointment's subject and description.
- **Add participant/resource** input field. Enter the names of the participants that are to take part in the appointment in this field. If participants are to get an additional invitation E-Mail for the appointment, enable **Notify all participants by email**.
- **Add attachments** button below **Attachments**. Click on this button to attach one or several files to the contact data.

Related topics

This view is used for the following actions:
Creating new appointments (p. 107), Editing appointments (p. 111)

7.2 Viewing Appointments

You can choose between the following views:

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

7.2.1 Displaying appointments in a calendar view

How to display appointments in a calendar view:

1. Click on **View** in the toolbar. Select one of the following entries: **Day**, **Work week**, **Week** or **Month**.
2. Open a calendar folder in the folder tree.
   In order to view all your appointments from all calendar folders, open the **All my appointments** folder.
3. Click on an appointment in the calendar sheet. The calendar's data is displayed in the pop-up.
4. In order to browse the calendar, use the navigation bar on top of the calendar sheet.
   In order to display the time frame with the current day, click on **Today** in the toolbar.
   Information on displaying appointments can be found in How are appointments displayed? (p. 104)

Tip: You can also search for appointments.

Similar actions

Displaying appointments in the list view (p. 104), Viewing or Saving Appointment Attachments (p. 106), Displaying multiple time zones (p. 103)

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 left side above 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.

7.2.3 Displaying appointments in the list view

How to display an appointment in the list view:

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

Tip: You can also search for appointments.

Similar actions

Displaying appointments in a calendar view (p. 103), Viewing or Saving Appointment Attachments (p. 106), Displaying multiple time zones (p. 103)

7.2.4 How are appointments displayed?

In a calendar view, the appointment display is defined by the following details:
- The color scheme set: classic colors, dark colors, custom colors
- Your availability displayed during the appointment duration: Booked, Tentative, Absent or Free
- Your appointment confirmation status: Accepted, Tentative, Declined
- Visibility of the appointment's subject and description: Private or visible for other users

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

Display for the color schemes Classic colors or Dark colors

Depending on the selected scheme, the appointments are displayed in the following colors:
- Tentative: yellow
- Free: green
- Booked: blue
- Absent: red

Depending on the appointment confirmation status, the appointments are displayed as follows:
- Accepted appointments are displayed in the color of the availability
- Tentatively accepted appointments are marked with the text addition *Tentative*.
- Declined appointments are displayed in light gray with crossed subject.
  Tip: In the calendar settings, you can define whether declined appointments are displayed.

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

Display for the color scheme Custom color

Depending on the selected scheme, the appointments are displayed in the following colors and patterns:
- Tentative: Selected color with small diagonal stripes
- Free: Selected color with broad diagonal stripes
- Booked: Selected color
- Absent: Selected color
  Tip: You can use a color of your choice for *Absent*

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

- Accepted appointments are displayed in the color and pattern of the availability
- Tentatively accepted appointments are displayed in light gray.
- Declined appointments are displayed in light gray with crossed subject.

  Tip: In the calendar settings, you can define whether declined appointments are displayed.

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

7.3 Viewing or Saving Appointment Attachments

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

- displaying a preview of the attachment
- opening the attachment in the browser
- downloading the attachment
- saving the attachment to *Drive* [141]

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

How to use the appointment attachment functions:

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

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

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

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

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

7.4 Creating Appointments

The following options exist:

- Creating new appointments
- Creating follow-up appointments
- Creating appointments from iCal attachments
- Importing appointments from files
- Subscribing appointments from other calendars
- Resolving appointment conflicts

7.4.1 Creating new appointments

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

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

How to create a new appointment:

1. Open a calendar folder in the folder tree.

   Note: Open a calendar folder for which you have the appropriate permissions to create appointments. If selecting a shared calendar folder, you are asked where to create the appointment:

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

   If you invite the owner to the appointment though, the appointment is saved in your calendar folder.
2. Click on **New** in the toolbar.
3. Enter a subject. If required, enter the location and a description.

   If you want to create the appointment in another calendar folder, click on the folder name next to **Calendar** at the top. Select a calendar folder.
4. Set the start and end date of the appointment. For all day appointments, activate **All day**.

   In order to display the time in different time zones, click on the timezone button next to the time. You can set frequently used time zones as favorites in the calendar settings.
5. To get an appointment reminder, select a setting in **Reminder**.
6. You can use additional functions: create recurrence, add other participants or resources, set the availability, assign colors, add attachments.
7. Click on **Create**.

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

Select one of the calendar views (*Day*, *Work week*, *Week* or *Month*). In order to display a specific time range, click on the date above the calendar sheet. In the calendar sheet double-click on a free area or drag open an area ranging from the beginning to the end of the new appointment.

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

Select one of the calendar views *Day*, *Work week*, *Week*. Double-click a free area above the calendar sheet.

Select one of the calendar views *Work week*, *Week*. Click on a day above the calendar sheet.

Similar actions

Creating follow-up appointments (p. 108), Creating appointments from iCal attachments (p. 109), Importing appointments from files (p. 109), Subscribing appointments from other calendars (p. 109)

How to use additional functions when creating appointments:

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

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

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

   To hide the repetition parameters, click the **Close** icon . In order to show them again, click on the sentence next to **Repeat**.
2. In **Display as** you can set the availability display. Examples can be found in the Calendar questions and answers.
3. If the subject is not to be shown to other users, activate **Private**. Private appointments are marked with the *Private* icon .
4. In order to set an individual color for the appointment, click on a color field. If you do not select a color or click on the first color field, the appointment is displayed in the color of the calendar folder. A calendar folder's default color is light blue.

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

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

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

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

   To inform all participants about the new appointment, enable *Notify all participants by E-mail.*.

   Tip: To find free appointments of all participants and resources you can use the schedule view [118].
6. To add an attachment to the appointment, click on **Add attachment** below *Attachments*. Select one or several files.

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

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

Related topics

Managing Groups (p. 120), Managing Resources (p. 121), Creating distribution lists (p. 86)

7.4.2 Creating follow-up appointments

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

How to create a follow-up appointment:

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

Similar actions

Creating new appointments (p. 107), Creating appointments from iCal attachments (p. 109), Importing appointments from files (p. 109), Subscribing appointments from other calendars (p. 109)

7.4.3 Creating appointments from iCal attachments

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

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

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

7.4.4 Importing appointments from files

Information on importing appointments from files can be found in Importing Data (page 188).

7.4.5 Subscribing appointments from other calendars

You can import appointments from other calendars, e.g. from your Google calendar, to a calender folder by subscribing the other calendar. Information can be found in Subscribing to data (page 184).

7.4.6 Resolving appointment conflicts

An appointment conflict happens if the following is true:

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

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

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

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

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

7.5 Answering appointment invitations

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

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

You can accept, temporarily accept or refuse your participation in the appointment. You can always changeyour appointment confirmation status later.

How to answer an appointment invitation in the notification area:

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

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

How to answer an appointment invitation in an E-Mail invitation:

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

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

7.6 Managing Appointments

Some of the techniques for organizing appointments require having all ready set up your own calendar folders. Information on creating folders can be found in Folders (page 174).

The following options exist:

- Editing appointments
- Editing appointments with drag and drop
- Changing the appointment status
- Managing favorite timezones
- Using calendar colors
- Moving appointments to another folder
- Printing appointments
- Deleting appointments
- Editing multiple appointments at once

7.6.1 Editing appointments

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

How to edit an appointment:

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

1. Depending on the view selected, use one of the following methods:
   Click on an appointment in a calendar view. Click on **Edit** in the pop-up.
   Select an appointment in the list view. Click on **Edit** in the toolbar.
   The appointment data is displayed in a new page.
2. Edit the data.
   A description of the input fields can be found in View for creating or editing (page 102).
3. Click on **Save**.

7.6.2 Editing appointments with drag and drop

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

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

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

How to move an appointment to another day:

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

How to change an appointment's time:

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

How to change the start or end of an appointment:

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

7.6.3 Changing the appointment status

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

How to change your appointment status:

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

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

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

7.6.4 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 **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Select **Calendar** from 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.

Similar actions

Displaying multiple time zones (p. 103)

7.6.5 Using calendar colors

You can assign a color to your personal calendar folders. All appointments in a folder will then be displayed in the color of the calendar folder. 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 folder.

How to select a calendar color:

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

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

7.6.6 Moving appointments to another folder

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

How to move an appointment to another folder:

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

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

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

   Select an appointment in the list view. Click the **Actions** icon in the toolbar. Select **Move** from the menu.

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

7.6.7 Printing appointments

To print calendars and appointments you can:

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

How to print a calendar sheet with appointments:

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

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

How to print an appointment's data:

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

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

   Select an appointment in the list view. Click the **Actions** icon in the toolbar. Click on **Print** in the menu.

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

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

How to print a list of appointments:

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

7.6.8 Deleting appointments

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

How to delete an appointment:

Warning: If you delete an appointment it will be irrevocably lost.
Depending on the server configuration, you can only edit an appointment in your private calendars if you are the appointment's organizer.

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

Result: The appointment will be deleted.

7.6.9 Editing multiple appointments at once

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

- Moving appointments to another folder
- Printing multiple appointments

How to execute a function for multiple appointments at once:

1. Click on **View** in the toolbar. Select **List**.
2. Use one or several of the following methods to at least select 2 appointments:
   If no checkboxes are displayed next to the appointments in the list, click on **View** in the toolbar. Enable **Checkboxes**.
   Enable the checkboxes for at least two appointments.
   You can also use your system's multi selection functions.
   In order to select all appointments in the currently selected folder, enable the **Select all** checkbox above the list.
3. Select a function from the toolbar.

7.7 Searching for Appointments

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

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

How to search for appointments:

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

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

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

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

     Accordingly, you can limit the search to the description, location or the attachment's name.
   - In order to search for appointments with a specific participant, click on a name in the search menu.

   Result:

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

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

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

7.8 Appointments in teams

The following options exist:

- Sharing appointments
- Sending an E-Mail to participants
- Inviting participants to a new appointment
- Creating a distribution list from the list of participants
- Scheduling appointments with several participants

7.8.1 Sharing appointments

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

- To make a calendar available for internal users or external partners, proceed as follows:
  - Create a new personal or public calendar folder.
  - Share this folder.

  You can also share an existing folder.
- If another internal user shared a calendar folder with you, you can access this folder in the folder tree.
- To invite external partners to an appointment, proceed as follows:
  - When creating the appointment, add external partners as *external participants*.
  - Make sure the *Notify all participants by E-Mail* option is enabled.

  The external partner receives an E-Mail with an appointment invitation in iCal format. Information can be found in Viewing Appointments

7.8.2 Sending an E-Mail to participants

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

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

1. Depending on the view selected, use one of the following methods:
   - Click on an appointment in a calendar view. Click on **Send mail to all participants** in the pop-up.
   - Select an appointment in the list view. Click on **Send mail to all participants** in the display area.
2. Fill in the details in order to Send a new E-Mail [56].

7.8.3 Inviting participants to a new appointment

If an appointment has several participants, you can invite those participants to a new appointment.

How to invite participants to a new appointment:

1. Depending on the view selected, use one of the following methods:
   - Click on an appointment in a calendar view. Click on **Invite to appointment** in the display area.
   - Select an appointment in the list view. Click on **Invite to appointment** in the display area.
2. Complete the details for creating an appointment [107].

7.8.4 Creating a distribution list from the list of participants

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

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

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

   Click on an appointment in a calendar view. In the pop-up, click on **Save as distribution list**.

   Select an appointment in the list view. Click on **Save as distribution list** in the display area.

2. Complete the details for creating the distribution list [86].

7.8.5 Scheduling appointments with several participants

When scheduling an appointment with several participants or resources, the Scheduling view shows free and busy time periods for the users and resources. In order to use the Scheduling view you have the following options:

- In order to create an appointment you can use the scheduling view on the Create appointment page.
- You can directly open the Scheduling view to create an appointment in a free time range.

Both options have the same result.

How to use the Scheduling view on the Create appointment page:

1. Add one or several users as participants on the *Create appointment* page.
2. Click on **Find a free time**.
3. The *Scheduling* page shows the following information:
   - The appointment's participants. There is a color assigned to each participant.
   - The participants' appointments. Each appointment is displayed in the color assigned to the participant.

   You can use the following functions:

   In order to select another time range, use the navigation bar on top of the calendar sheet.

   Add or remove participants or resources.

   To change the view, click on **Change view** on the bottom right side.

4. In the calendar sheet drag open an area ranging from the beginning to the end of the new appointment. The *Create appointment* page opens.
5. Complete the details for creating the appointment [107].

How to directly open the Scheduling view:

1. Click on **Scheduling** in the toolbar.
2. Add resources or other users as participants on the *Scheduling* page.
3. The following information are displayed on the page:
   - The appointment's participants. There is a color assigned to each participant.
   - The participants' appointments. Each appointment is displayed in the color assigned to the participant.

   You can use the following functions:

   In order to select another time range, use the navigation bar on top of the calendar sheet.

   Add or remove participants or resources.

   To change the view, click on **Change view** on the bottom right side.
4. In the calendar sheet drag open an area ranging from the beginning to the end of the new appointment. The *Create appointment* page opens.
5. Complete the details for creating the appointment [107].

7.9 Managing Groups

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

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

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

How to create a new group:

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

7.10 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. There are the following options:

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

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

How to create a new resource:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
   In the 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 E-Mail address for the resource.
   Click on **Create**.

How to edit a resource:

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

7.11 Calendar Settings

How to use the calendar settings:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Calendar** in the sidebar.
3. Change the settings [122].

The following settings are available.

- Time scale in minutes
- Start of working time
- End of working time
- Display refused appointments
- Default reminder
- Mark all day appointments as free
- Receive notification for appointment changes
- Receive notification as appointment creator when participants accept or decline
- Receive notification as appointment participant when other participants accept or decline
- Automatically delete incoming notifications after the appointment has been accepted or declined

Time scale in minutes

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

Start of working time

Defines the start of the working hours.

End of working time

Defines the end of the working hours.

Display refused appointments

Defines whether appointments that you refused are displayed.

Default reminder

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

Mark all day appointments as free

Defines whether all day appointments are displayed as free per default.

Receive notification for appointment changes

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

Receive notification as appointment creator when participants accept or decline

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

Receive notification as appointment participant when other participants accept or decline

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

Automatically delete incoming notifications after the appointment has been accepted or declined

Defines whether the E-Mail notification for an appointment invitation will be automatically deleted when accepting or declining the appointment.

8 Tasks

Learn how to work with the *Tasks* application.

- The *Tasks* Components
- view tasks
- create tasks
- answer task invitation
- organize tasks
- search for tasks
- share tasks with other users
- interchange tasks with other applications
- use the *Tasks* settings

How to launch the *Tasks* app:

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

8.1 The *Tasks* Components

The *Tasks* app includes the following components.

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

Search bar

Enables you to search for tasks.

Folder tree

Displays the tasks folders. Enables you to navigate the folder structure. In order to open the folder tree, click on the **View** button in the toolbar. Enable **Folder view**. Depending on the groupware configuration, the folder tree contains the following entries:

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

The following functions are available:

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

Related topics

Information on folders can be found in Folders (p. 174).

Instructions for frequently used actions can be found here:
Navigating within the folder structure (p. 174), Creating folders (p. 176), Renaming folders (p. 176), Moving folders (p. 176), Deleting folders (p. 176)

Toolbar

Contains the following:

- **New** button. Creates a new task.
- **Edit** button. Edits a task's data.
- **Due** button. Changes a task's due date.
- **Done** button. Marks a task as done.
- **Delete** button. Deletes the tasks selected by you.
- **Actions** icon . Opens a menu with further functions:
- **View** button. Opens a menu with checkboxes for controlling the view.
  - **Folder view** checkbox. Opens or closes the folder tree.
  - **Checkboxes** checkbox. Displays a checkbox next to each task in the list. This allows to select multiple tasks to edit them at once.

Related topics

Instructions for the buttons and icons can be found here:
Creating Tasks (p. 131), Editing tasks (p. 133), Changing a task's due date (p. 133), Marking tasks as done (p. 133), Deleting tasks (p. 134)

Instructions for the functions in the **Actions** menu can be found here:
Printing tasks (p. 134), Moving tasks (p. 134), Editing multiple tasks at once (p. 135)

Display area

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

List

Displays a list of tasks in the folder selected. The list contains the following entries:

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

The following functions are available:

- If clicking on a task, its content is displayed in the detail view.
- You can select multiple tasks to edit them at once. To do so enable the checkboxes next to the tasks by enabling the **Checkboxes** option from the **View** drop-down in the toolbar.

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

  In order to select all contacts in the currently selected folder, enable the **Select all** checkbox above the list.
- If clicking the **Sort** icon↓↑ above the list, a menu opens that allows to sort tasks. You can also define in this menu whether tasks done are displayed.

Related topics

Searching for Tasks (p. 136), Editing multiple tasks at once (p. 135)

Detail view

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

- Subject

  A priority icon next to the subject, if available

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

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

View for creating or editing

When composing a new task or editing an existing task, the following elements are displayed on a new page.

- **Create** button. If clicking on this button, the current task data are saved and the editing page is closed.
- **Discard** button. In order to cancel the creation or editing, click on this button.
- **Subject** input field. Enter the subject in this field. The subject is displayed as task title in the views.
- **Description** input field. You can enter a description for the task in this field.
- **Expand form** button. Displays additional input fields.
  - **Start date** and **Due date** input fields. Defines the start and the due date. If clicking on it, a dialog for selecting the date opens.

    If the **All day** checkbox is disabled, you can set start and due times.
  - **All day** checkbox. Enable this checkbox if the task is to last the entire days.
  - **Repeat** checkbox. Enable this checkbox if the task is to be repeated. Additional control elements for setting the recurring parameters are displayed. Examples can be found in the questions about appointments and tasks.
  - **Remind me** drop-down menu. Defines when to be reminded of the task's due date by an entry in the info area. You can also set a date and time for the reminder in **Reminder date**.
  - **Status** drop-down menu. Defines the task's status. You can also enter a percentage value for the task completion in **Progress**.
  - **Priority** drop-down menu. Defines the task's importance.
  - **Private** checkbox. Enable this checkbox if other users are not to see the task's subject and description.
  - **Add participant/resource** input field. Enter the names of the participants that are to take part in the task in this field.
  - **Add attachments** button below **Attachments**. Click on this button to attach one or several files to the contact data.
  - **Show details** button. If clicking on it, additional data fields are displayed where you can enter billing details like estimated efforts, actual efforts or billing information.

Related topics

This view is used for the following actions:
Creating Tasks (p. 131), Editing tasks (p. 133)

8.2 Viewing Tasks

How to display a task:

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

Tip: You can also search for tasks.

Similar actions

Viewing or Saving Task Attachments (p. 130)

8.3 Viewing or Saving Task Attachments

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

- displaying a preview of the attachment
- opening the attachment in the browser
- downloading the attachment
- saving the attachment to *Drive* [141]

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

How to use the task attachment functions:

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

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

8.4 Creating Tasks

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

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

How to create a new task:

1. Open a tasks folder in the folder tree.

   Note: Select a folder for which you have the permission to create tasks.
2. Click on **New** in the toolbar.
3. Enter a subject. Enter a description, if needed.

   To view the complete form, click on **Expand form**. The following optional functions are available.

   Set the task's start and due date.

   In case you want to be reminded of the task, select a setting in the **Remind me** drop-down field.

   You can use additional functions: Creating recurring tasks, adding participants or groups, adding attachments, adding details.
4. Click on **Create**.

How to use further functions when creating a task:

Prerequisite: The dialog for creating a new task is selected. The **Expand form** setting is activated.

1. In order to create a recurring tasks, enable **Repeat**. The current repetition parameters are displayed.

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

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

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

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

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

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

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

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

Related topics

Managing Groups (p. 120), Creating distribution lists (p. 86)

8.5 Answering Task Invitations

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

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

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

How to answer a task invitation in the notification area:

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

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

How to answer a task invitation in an E-Mail invitation:

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

8.6 Managing Tasks

Some of the techniques for organizing tasks require having set up own tasks folders. Information on creating folders can be found in Folders (page 174).

The following options exist:

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

8.6.1 Editing tasks

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

How to edit a task:

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

1. Select a task from the list.
2. Click on **Edit** in the toolbar. The task's data are displayed.
3. Edit the data.
   A description of the input fields can be found in View for creating or editing (page 128).
4. Click on **Save**.

8.6.2 Marking tasks as done

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

How to mark a task as done:

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

1. Select a task from the list.
2. Click on **Done** in the toolbar.
   The button label changes to **Undone**. Clicking on it marks the task as not done.

8.6.3 Changing a task's due date

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

How to change a task's due date:

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

1. Select a task from the list.
2. Click on **Due** in the toolbar. Select an entry.

8.6.4 Moving tasks

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

How to move a task:

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

1. Select a task from the list.
2. Click the **Actions** icon ≡ in the toolbar. Select **Move** from the menu.
3. Select a folder in the *Move* window. Click on **OK**.

Tip: In order to move tasks using drag and drop, select a task or multiple tasks in the list. Drag the selected tasks to a folder in the folder tree.

8.6.5 Changing tasks confirmations

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

How to change your task confirmation:

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

8.6.6 Printing tasks

In order to print tasks you can do the following:

- print a task's data

How to print an appointment's data:

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

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

8.6.7 Deleting tasks

You can delete one task or multiple tasks at once.

How to delete a task:

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

1. Select a task from the list.
2. Click on **Delete** in the toolbar.
3. Confirm that you want to delete the task.

Result: The task will be deleted.

8.6.8 Editing multiple tasks at once

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

- Moving tasks to another folder
- Marking tasks as done or undone
- Deleting tasks
- Printing multiple tasks

How to execute a function for multiple tasks at once:

1. Use one or several of the following methods to at least select 2 tasks:

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

    Enable the checkboxes for at least two tasks.

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

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

8.7 Searching for Tasks

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

- search terms for subject, description, attachments' names, participants
- Folders that are to be searched
- the task's status
- Task type: single or recurring task
- Folder type: all, private, public, shared

How to search for tasks:

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

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

   Define the data sources to be searched by clicking on an entry in the search menu.
   - If clicking on the search term or pressing enter, the following data sources are searched: subject, description
   - In order to only search in the subject, click on **in subject** in the search menu.

     Accordingly, you can limit the search to the description or the attachment's name.
   - In order to search for appointments with a specific participant, click on a name in the search menu.

   Result:

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

8.8 Tasks in teams

The following options exist:

- Sharing [137] tasks with other users
- Delegating [137] tasks to other users

8.8.1 Sharing tasks

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

- To make a folder available for internal users or external partners, proceed as follows:

  Create a new personal or public tasks folder.

  Share this folder.

  You can also share an existing folder.
- If another internal user shared a task folder with you, you can access this folder in the folder tree.
- To invite external partners to a task, proceed as follows:

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

8.8.2 Delegating tasks

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

8.9 Interchanging Tasks with Other Applications

The following options exist:

- export [193] tasks to use them in other applications
- import [188] tasks that you created in other applications

8.10 Tasks Settings

How to use the tasks settings:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Tasks** in the sidebar.
3. Change the settings [139].

The following settings are available.

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

Receive notifications when a task in which you participate is created, modified or deleted

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

Receive notifications when a participant accepted or declined a task created by you

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

Receive notifications when a participant accepted or declined a task in which you participate

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

9 Drive

Learn how to work with the *Drive* application.

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

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

How to launch the *Drive* app:

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

9.1 The *Drive* Components

The *Drive* app includes the following components.

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

Search bar

Enables you to search for files.

Folder tree

Displays the folders. Enables you to navigate the folder structure. In order to open the folder tree, click on the **View** button in the toolbar. Enable **Folder view**. Depending on the groupware configuration, the folder tree contains the following entries:

- *My files*. Contains your personal files and folders. Per default, it contains folders for documents, music, images, and videos.
- *Trash*. Contains the files deleted by you.
- *My shares*. Shows the files and folders shared by you for other users or external partners.
- *Shared files*. Contains files shared with you by other users.
- *Public files*. Contains files shared with all users.
- Buttons below the folders offer functions for adding cloud storage accounts that you set up in third party products like Dropbox.

The following functions are available:

- If clicking on a folder, its contents are displayed.
- The **Folder-specific actions** icon next to the selected folder offers functions for organizing data and for exchanging data.
- Depending on the groupware's configuration, additional buttons are available below the folders. Those buttons allow to launch a wizard to configure various clients.

Related topics

Information on folders can be found in Folders (p. 174).

Instructions for frequently used actions can be found here:
Navigating within the folder structure (p. 174), Creating folders (p. 176), Renaming folders (p. 176), Moving folders (p. 176), Deleting folders (p. 176), Sharing files and folders (p. 159)

Toolbar

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

- **New** button. Contains the following functions:
  - **Add local file**. Adds one or multiple local files.
  - **Add and encrypt local file**. Adds and encrypts a local file. This function is only available if you have access to Guard.
  - **Add note**. Creates a simple text file.
  - **New text document**. Creates a new text document.
  - **New spreadsheet** Creates a new spreadsheet.
  - **Add new folder**. Creates a new folder.
- **Share** icon . This function allows to share files or folders.
- **Viewer** icon . Shows the contents of the folder's files in the viewer.
- **Present** icon . Starts a presentation. This function is only available if you select a document in the PowerPoint or PDF format.
- **Download** icon . Downloads the files selected by you. Multiple files are downloaded as zip archive.
- **Delete** icon . Deletes the files or folders selected by you.
- **Actions** icon . Opens a menu with further functions:

  Note: If you selected multiple files, some functions are not available.
- **View** button. Allows to select the view in the display area.

Related topics

Instructions for the buttons and icons can be found here:
Creating Files or Folders (p. 150), Displaying a file's content (p. 147), Holding a presentation (p. 147), Downloading files or folder contents (p. 149), Deleting files (p. 153)

Instructions for the functions in the **Actions** menu can be found here:
Sending files as E-Mail attachments (p. 151), Sending files as a link (p. 151), Showing the link to a file (p. 151), Adding files to the portal (p. 153), Moving files or folders (p. 152), Copying files (p. 152), Locking or unlocking files (p. 154)

Navigation bar

The navigation path is located below the toolbar. It contains the following:

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

Display area

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

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

The following functions are available.

- In order to display details of a selected object, click on **View** in the toolbar. Enable **File Details**. The following information are displayed in a sidebar:
  - *Details*. Shows general information: the name of the file or folder, the file size, the date of the last change, the editor's name, folder, link

    If you shared the object, the button next to *Shares* can be used to open the dialog window for editing shares.
  - *Description*. Shows file comments, if available.

    In order to add a description, click on **Add a description**. In order to edit a description, double-click on the description.
  - **Upload a new version** button. Click on this button to select a file that is uploaded as new version.
  - If there are several file versions, the *Versions* area is displayed. For each version the following information is displayed:
    - The version's file name. If clicking on it, a menu with several functions opens:
    - The version's file size
    - name of the user who uploaded the version
    - date and time of the version's upload
- In order to display specific object types only, click on **Select** in the navigation bar. Enable an entry below *Filter*.

  In order to display all objects, click on **Select** in the navigation bar. Enable the entry **None** below *Filter*.
- In order to sort objects, click on **Sort by** in the navigation bar. Enable an entry.
- Select a file or folder by clicking on it. You can also use your system's multi selection functions.

  You can also use checkboxes to select files or folders. In order to display the checkboxes, click on the **View** button in the toolbar. Enable **Checkboxes**.

  To select all objects or files or to clear the selection, click on **Select** in the navigation bar. Click on an entry below *Select*.
- If double-clicking on a folder, it will be opened.
- If double-clicking on a file, it will be opened in the viewer.

Related topics

Displaying Files and Folders (p. 147), How to download files: (p. 149), Managing Files (p. 151), Sharing (p. 158)

Viewer

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

Double-click on a file in the display area

Select a file. Click the **Viewer** icon in the toolbar.

The viewer includes the following elements:

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

  If there are further files, icons for browsing are displayed to the left and to the right of the view.

Related topics

Instructions for the buttons and icons can be found here:
Displaying a file's content (p. 147), Holding a presentation (p. 147), How to download files: (p. 149), Sharing files and folders (p. 159), Deleting files (p. 153), Working with versions (p. 154)

Instructions for the functions in the **Actions** menu can be found here:
Editing file names (p. 152), Creating or editing descriptions (p. 152), Sending files as E-Mail attachments (p. 151), How to upload a new version: (p. 154), Deleting files (p. 153)

9.2 Displaying Files and Folders

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

- display [147] a file's content
- hold [147] presentations in familiar Office formats or in the PDF format.
- download [149] a folder's files or contents

9.2.1 Displaying a file's content

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

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

How to display a file's content:

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

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

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

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

   Depending on the file type, different functions can be available:
   - For text files and documents in the Office format, there are editing functions available: Information on editing documents can be found in the Documents user documentation.
   - For presentations, an icon for presenting the presentation is shown.
   - For audio and video files in suitable formats, there are playing functions available.

     Note: The playing options depend from the browser used.
5. In order to open the previous or next file, click the **Back** icon or the **Next** icon next to the view.

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

Tip: You can also search for files.

Similar actions

Holding a presentation (p. 147), Downloading files or folder contents (p. 149)

9.2.2 Holding a presentation

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

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

How to locally hold a presentation:

1. Open a folder containing presentations.
2. Select a presentation in the display area. Click the **Present** icon in the 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 icon **Toggle fullscreen**, the fullscreen mode is activated You can use the [esc] key or the function bar at the bottom of the screen to leave the fullscreen mode.
4. In order to end the presentation, click on **End presentation** in the toolbar.

Similar actions

How to hold a remote presentation: (p. 148), Displaying a file's content (p. 147), Downloading files or folder contents (p. 149)

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

Similar actions

How to locally hold a presentation: (p. 148), Displaying a file's content (p. 147), Downloading files or folder contents (p. 149)

9.2.3 Downloading files or folder contents

The following options exist:

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

How to download files:

1. Open a folder containing files.
2. Select one or several files in the display area. Click the **Download** icon in the toolbar.
   You can also use the **Download** button in the *Viewer*.
3. Complete the steps for downloading the file.

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

How to download the complete content of a folder:

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

9.3 Creating Files or Folders

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

How to add new files:

1. Open a folder.
   Note: Open a folder for which you have the appropriate permissions to create objects.
2. Click on **New** in the toolbar. Click on **Add local file**.
3. Select one or several files in the *Upload file* window.
   Click on **Open**. The display area shows the current progress status.
   In order to cancel the process, click on **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 continue working in the groupware during the upload process.

Tip: You can also create a new file by dragging a file from a file browser or from your desktop to the *Drive* app window and drop it in the display area.

How to create a new folder:

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

9.4 Managing Files

Some of the techniques for managing files require having all ready set up your own folders. Information on creating folders can be found in Creating Files or Folders (p. 150).

The following options exist:

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

9.4.1 Sending files as a link

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

How to send links to files:

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

9.4.2 Sending files as E-Mail attachments

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

How to send files as an E-Mail attachment:

1. Select one or several files in the display area. Click the **Actions** icon ≡ in the toolbar. Click on **Send by mail** in the menu.

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

9.4.3 Showing the link to a file

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

How to display links to files:

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

9.4.4 Editing file names

You can edit a file name.

How to edit the file name:

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

1. Select a file in the display area. Click the **Actions** icon in the toolbar. Click on **Rename** in the menu.
2. Edit the file name in the *Rename* window. Note the name extension. Click on **Rename**.

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

9.4.5 Creating or editing descriptions

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

How to create or edit a file's description:

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

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

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

You can also use the function in the sidebar of the *Viewer*.

9.4.6 Moving files or folders

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

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

How to move objects to another folder:

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

1. Select the objects in the display area. Click the **Actions** icon in the toolbar. Select **Move** from the menu.
2. Select a folder in the *Move* window. Click on **Move**.

Tip: In order to move files using drag and drop, select the objects in the display area. Drag the selected objects to a folder in the folder tree.

9.4.7 Copying files

You can copy files to another folder:

How to copy files to another folder:

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

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

9.4.8 Adding files to the portal

You can add a file as widget to the Portal.

How to add a file to the portal:

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

9.4.9 Deleting files

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

- delete files. The files are moved to the *Trash* folder.
- Recover deleted files from the *Trash* folder.
- Permanently delete files from the *Trash* folder. You can also permanently delete all items in a folder by emptying the trash.

  Warning: A file deleted in the *Trash* folder can not be recovered.

How to delete a file:

1. Select one or several files in the display area. Click the **Delete** icon in the toolbar.

   You can also use the **Actions** icon .
2. Confirm that you want to delete the selected files.

Result: The selected files are deleted.

How to recover deleted files:

1. Open the *Trash* folder.
2. Select one or several files.
3. Click the **Actions** icon in the toolbar. Select **Move** from the menu.
4. Select a folder in the *Move* window. Click on the **Move** button.

Result: The files are moved to the selected folder.

How to permanently delete a file:

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

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

Result: The files are permanently deleted.

How to permanently delete the content of the Trash folder:

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

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

Result: The objects in the trash are permanently deleted.

9.4.10 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.

How to lock files:

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

How to unlock files:

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

9.4.11 Working with versions

There are the following options for working with versions:

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

How to open or save the current version:

1. Select a file in the display area. Click the **Download** icon in the 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 open or save a certain 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 the icon next to *Versions* in the sidebar. The list of versions is displayed.
   Click on a version. Click the **Download** menu item.
3. Complete the steps for opening or downloading.

You can also use the function in the sidebar of the *Viewer*.

How to set a certain file version as 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. Click the icon next to *Versions* in the sidebar. The list of versions is displayed.
   Click on a version. Click on the **Make this the current version** menu entry .

You can also use the function in the sidebar of the *Viewer*.

How to delete a certain 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 the icon next to *Versions* in the sidebar. The list of versions is displayed.
3. Click on a version. Click on **Delete version** in the menu.

You can also use the function in the sidebar of the *Viewer*.

9.5 Searching for Files

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

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

How to search for files:

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

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

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

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

   Result:

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

9.6 Sharing

By sharing files or folders with read or edit access in the Drive app, you can co-operate with other users or external partners. There are the following options:

- Share files or folders for other users or external partners with read or edit access.
- Access files or folders shared with you by other users.
- Get an overview of your shares by displaying them on an overview page.
- Manage your shares by adding new users, removing users or changing permissions.

Notes:

- The following descriptions show how to share files and folders. In case you want to share E-Mails, contacts, appointments or tasks, use the methods described in 11.3: Sharing (page 180).
- When sharing items, internal users or external partners are granted certain permissions for the shared data. Information on permissions can be found in 11.2: Permissions (page 178).

9.6.1 Sharing files and folders

There are the following options:

- You can share a file or folder with read access by creating a public link.

  You can give this link to internal users or external partners. Everyone who gets this link can view the file or the folder content.
- Invite internal users or external partners per E-Mail to a share. You define which permissions are granted for the share.

  The invitation E-Mail contains notes for accessing the share. If an external partner accesses the share, the partner will automatically be logged in as guest user.

  Note: The invitation E-Mail is exclusively sent in html format.

Note: In order to share objects, you need to have administrator permissions.

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

1. Select a folder in the folder tree. Select an object in the display area.

   Note: Select a single object. Multiple objects can not be shared together in a public link.
2. Click the **Share** icon in the toolbar. Click on **Get a link**.

   The window for sharing objects will be opened. It contains a public link for a read access to the share.
3. You have the following options:

   In order to directly send the link per E-Mail, enter the respective E-Mail addresses. You can enter a message for the recipients.

   Per default, the data are shared with read access for an unlimited time. To set a time limit for the access to the shared data, enable **Expires in**. Select a time range.

   To protect the access with a password, enable **Password required**. Enter a password. If you send the public link per E-Mail, the E-Mail contains the password.
4. Click on **Done**.

You can also share a single file in the *Viewer*.

You can also share a folder by clicking the **Folder-specific actions** icon next to the folder name in the folder tree. Click on **Get a link**.

In order to view the permissions of a shared object, select the object in the display area. Below *Details*, click on the button next to *Shares*.

Similar actions

How to invite internal users or external partners to a share: (p. 159)

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

1. Select a folder in the folder tree. Select one or several objects in the display area.
2. Click the **Share** icon in the toolbar. Click on **Invite people**.

   A window opens. Existing permissions will be shown as a list.
3. Enter an E-Mail address in *Add people*. The E-Mail address will be added to the list as internal user, group or guest. Preset permissions are granted.

   If required, enter a message.
4. To edit the permissions, you have the following options.

   To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.

   To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu.
5. If you share a folder, you can transfer the folder's permissions to all existing or newly created sub-folders of this folder. To do so, enable **Apply to all subfolders**.
6. Click on **Save**.

You can also share a single file in the *Viewer*.

You can also share a folder by clicking the **Folder-specific actions** icon next to the folder name in the folder tree. Click on **Invite people**.

In order to view the permissions of a shared object, select the object in the display area. Below *Details*, click on the button next to *Shares*.

Similar actions

How to share objects with read access by using a public link: (p. 159)

9.6.2 Accessing shared data

In the folder tree, you have access to objects shared with you by other users.

How to access objects shared by other users:

1. Click on **Shared files** in the folder tree.
   If a user shared objects with you, a folder named after the user will be displayed.
   Tip: To see the permissions that have been granted for the shared folder, click the **Folder-specific actions** icon . Click on **Existing shares**.
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.

9.6.3 Displaying own shares

To get an overview of your shares, you can display all your shares as a list. In addition, there are the following options:

- You can sort the list by different criteria.
- You can display the content of a share's parent folder.
- You can edit your shares.

How to display your shares:

1. Click on **My shares** in the folder tree.
   The folders and files shared by you are displayed in the detail view. For each share a row with the following details is displayed.
   - An icon indicates the share's object type: file or folder.
   - The share's name and folder path. To open a folder, click on a path entry.
   - Three icons in different colors indicate whether an object has been shared for specific users.
     - The icon indicates whether the object has been shared for internal users.
     - The icon indicates whether the object has been shared for guest users.
     - The icon indicates whether the object has been shared by using a public link.
   - The share's creation date.
2. You can do the following:
   To sort the shares list, click on **Sort by** above the list. Select an entry.
   To display the content of a share's parent folder, click on a path entry in the list.

Similar actions

How to access objects shared by other users: (p. 160), How to edit existing permissions: (p. 161), How to add new permissions: (p. 161), How to remove permissions for single users: (p. 161), How to remove all permissions: (p. 162)

9.6.4 Managing own shares

In order to organize own shares, you can do the following:

- edit the existing permissions, e.g. by changing the read permission for a certain user into write permissions
- add new permissions by granting permissions to an additional user
- remove existing permissions for certain users
- remove all existing permissions for all users

How to edit existing permissions:

1. Click on **My shares** in the folder tree.
2. Select a share in the detail view. Click on **Edit share** in the toolbar. A window opens. It displays the granted permissions for each user.
3. Use the following methods:

   To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.

   To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu.

   Note: You cannot change the administrative rights of a personal folder.

   Note: Permissions can not be changed for public links.
4. Click on **Save**.

Similar actions

How to add new permissions: (p. 161), How to remove permissions for single users: (p. 161), How to remove all permissions: (p. 162)

How to add new permissions:

1. Click on **My shares** in the folder tree.
2. Select a share in the detail view. Click on **Edit share** in the toolbar. A window opens. It displays the granted permissions for each user.
3. Enter an E-Mail address in *Add people*. The E-Mail address will be added to the list as internal user, group or guest. Preset permissions are granted.
4. Click on **Save**.

Similar actions

How to edit existing permissions: (p. 161), How to remove permissions for single users: (p. 161), How to remove all permissions: (p. 162)

How to remove permissions for single users:

1. Click on **My shares** in the folder tree.
2. Select a share in the detail view. Click on **Edit share** in the toolbar. A window opens. It displays the granted permissions for each user.
3. In order to remove a user's permissions, click the **Actions** icon ≡ next to the user's name. Click on **Revoke access** in the menu.
4. Click on **Save**.

Similar actions

How to edit existing permissions: (p. 161), How to add new permissions: (p. 161), How to remove all permissions: (p. 162)

How to remove all permissions:

1. Click on **My shares** in the folder tree.
2. Select a share in the detail view. Click on **Revoke access** in the toolbar.

Similar actions

How to edit existing permissions: (p. 161), How to add new permissions: (p. 161), How to remove permissions for single users: (p. 161)

9.7 Accessing Files with WebDAV

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

- The advantage is the quick and direct access with a file browser e.g. 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. Information on permissions can be found in 11.2: Permissions (page 178).

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
- Setting up WebDAV under Windows XP
- Setting up WebDAV under Windows Vista
- Setting up WebDAV under Windows 7

9.7.1 Setting up WebDAV under Linux

How to set up WebDAV access under Linux:

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

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

9.7.2 Setting up WebDAV under Windows XP

How to set up WebDAV access under Windows XP:

1. Click on **My Network Places**. In the *My Computer* window click on **My Network Places** or double-click the **My Network Places** icon in the Windows Desktop.
2. Go to *Network tasks*, open the dialog window *My Network Places* and click on **Add a network place**. A wizard for adding network resources is launched. Click on **Next**.
3. In the next dialog window select **Choose another network place**.
4. Enter the following address:
https://<adresse>/servlet/webdav.infostore
where <address> needs to be replaced by the IP address or URL of the Groupware Server.
5. Enter your username and your password for the Groupware Server.
6. In the next dialog window you can assign a name to the network resource.

   Note: If you have set your encoding to ISO, please do not use any special characters for folder or document names. The groupware server uses UTF-8 encoding.
7. In the next dialog window click on **Finish**.

Result: You can use the network place to access your *Drive* app files.

9.7.3 Setting up WebDAV under Windows Vista

In order to set up the WebDAV access under Windows Vista use one of the following options:

- Use the OX Updater. Information can be found in the OX Updater user documentation.
- First, install the Microsoft Software Update for web folders. Then, set up the WebDav access.

How to install the Microsoft Software Update for WebDAV:

1. Open a web browser.
2. Enter the following address: http://support.microsoft.com/kb/907306
3. Browse to *More Information* and click on **Download the Software Update for Web Folders package now**.
4. On the download page click on **Download**. The file Webfldrs-KB907306-ENU.exe will be downloaded.
5. Double-click on the file. The installation will be launched.

How to set up WebDAV access under Windows Vista:

1. In the Windows Explorer open **Computer**.
2. Right-click on a free area in the right pane of the Explorer. From the drop-down menu select **Add a Network Location**. The *Add network location* dialog window opens. Click on **Next**.
3. Select **Choose a custom network location**. Click on Next.
4. In the *Add network path* dialog window enter the following address:
   https://<address>/servlet/webdav.infostore
   where <address> needs to be replaced by the Groupware server's ip address or url.
5. Enter your username and password for accessing the Groupware Server.
6. In the next dialog window you can assign a name to the network resource.
7. In the next dialog window click on **Finish**.

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

9.7.4 Setting up WebDAV under Windows 7

In order to set up WebDAV access under Windows 7, use one of the following options:

- Use the OX Updater. Information can be found in the OX Updater user documentation.
- Then, manually set up the WebDav access.

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

How to manually set up WebDAV access under Windows 7:

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

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

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

9.8 Using Cloud Storages

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

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

9.8.1 Setting up and editing cloud storages

There are the following options:

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

How to set up cloud storages:

1. Below the folder tree, click an icon below *Add account*. A new browser window opens.
2. In the new browser window, enter your credentials for the cloud storage account.
   If the cloud storage service asks you for the permission to access the data, grant this permission.
   Note: Depending on the provider, the access requests can vary.

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

How to edit the settings of a cloud storage account:

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

How to remove a cloud storage account:

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

9.8.2 Using cloud storages

There are the following options:

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

9.9 Files and Teams

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

- In *Public files* and in *Shared files* you can find file folders shared by other users.
- To make additional files available for internal users or external partners, proceed as follows:

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

    Share this folder.

  You can also share an existing folder.

9.10 Drive Settings

How to use the Drive settings:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Drive** in the sidebar.
3. Change the settings [168].

The following settings are available.

- Show hidden files and folders

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.

10 Editor

Learn how to work with the *Editor* application.

- create text files
- edit text files

In order to search for text files, organize them or share them with other users, use the *Drive* [141] application.

How to launch the *Editor* app:

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

10.1 Creating Text Files

You can create text files with plain text. You can either enter the text or paste it from the clipboard.

How to create a new text file:

1. Launch the *Drive* app.
2. open a folder in the folder tree.
   Note: Open a folder for which you have the appropriate permissions to create objects.
3. Click the **New** icon in the toolbar. Click on **Add note**.
4. Enter a title.
5. Enter the text or paste text from the clipboard.
6. In order to edit the text, use the common techniques from the familiar applications.
7. In order to save the text, click on **Save**.
   In order to finish, click on **Close**.

10.2 Editing Text Files

How to edit a text file:

1. Launch the *Drive* app.
2. Open a folder containing text, in the folder tree.
   Note: Open a folder for which you have the permission to create objects.
3. Depending on the view selected, use one of the following methods:
   Click on a text file in the *Icons* view. Click on **Edit** in the pop-up.
   In the *List* view, select a text file in the sidebar. Click on **Edit** in the display area.
   The text will be opened for editing.
4. In order to edit the text, use the common techniques from the familiar applications.
5. In order to save the text, click on **Save**.
   In order to finish, click on **Close**.

11 Organizing Data

Learn how to organize your data.

- Work more efficiently with folder management.
- Learn the basics about permissions.
- Organize your team work with the help of shares.
- Use the data from your social networks like LinkedIn by using subscriptions.

11.1 Folders

Folders help you

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

Learn more about folders and how to use them:

- the folder types [174]
- navigate within the folder structure [174]
- hide [175] certain folders
- add folders to favorites [175]
- create [176], rename,delete [176], and move [176] folders or subfolders.

11.1.1 Folder types

The following folder types exist in the folder tree:

- Personal folders
    - Personal folders contain your E-Mails, contacts, appointments, tasks, and files. Other users can not view your personal folders, unless you share them with other users.
    - Your personal folders for contacts, appointments, tasks, and files can be found below *My address books*, *My calenders*, *My tasks*, *My files* in the respective app.
- Public folders
    - Public folders contain contacts, appointments, and documents that are of common interest to all users. Each user can create public folders and share them with other users.
    - The public folders for contacts, appointments, tasks, and files can be found below *Public address books*, *Public calenders*, *Public tasks*, *Public files* in the respective app.
- Shared folders
    - Shared folders have been shared with you by other users with read or write permission.
    - The shared folders for contacts, appointments, tasks, and files can be found below *Shared address books*, *Shared calenders*, *Shared tasks*, *Shared files* in the respective app.

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

11.1.2 Navigating within the folder structure

The following functions are available:

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

How to open or close the folder tree:

Use one of the following methods:

Click on **View** in the toolbar. Enable or disable **Folder view**.

Below the folder tree, click the **Open folder view** icon » or the **Close folder view** icon «.

In the *E-Mail* app, double-click a free area above the E-Mail list.

How to change the folder tree width:

1. Move the cursor to the right border of the folder tree. A double arrow will be displayed.
2. Drag the border to the left or to the right.

How to open or select a folder:

1. If the folder tree is closed, open it.
2. To view a folder's subfolders, click on the arrow next to the folder name.
3. Click on a folder. The folder's items are displayed in the detail view.
   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.

11.1.3 Hiding folders

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

- hide single folders
- display hidden folders again

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

How to hide a folder:

1. In the *Address Book*, *Calendar* or *Tasks* app, open the folder tree and select the folder that you want to hide.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Hide**.
   Note: If you select a folder that can not be hidden, this function is not displayed.

How to display a hidden folder again:

1. Depending on the app, open the entry **Hidden address books**, **Hidden calendars** or **Hidden tasks** at the bottom of the folder tree in the *Address Book*, *Calendar* or *Tasks* app. The hidden folders will be displayed.
2. Click the **Folder-specific actions** icon next to a folder name. Click on **Show**.

11.1.4 Adding folders to 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 folders in the folder tree will not be affected by those actions.

How to add a folder to *Favorites*:

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

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

How to remove a folder from *Favorites*:

1. Select a folder in the folder tree below *Favorites*.
2. Click the **Folder-specific 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 tree.

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

11.1.5 Creating folders

You can create any number of subfolders in a personal folder. To create subfolders in a shared or public folder, you need to have the required permissions [178]. Depending on the app, there are different ways of creating folders.

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

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

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

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

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

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

11.1.6 Renaming folders

You can rename subfolders in your personal folders. For other folders you need the appropriate permissions [178].

How to rename a folder:

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

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

11.1.7 Moving folders

You can move subfolders from your personal folders. For other folders you need the appropriate permissions [178].

How to move a folder:

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

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

11.1.8 Deleting folders

You can delete subfolders in your personal folders. For other folders you need the appropriate permissions [178].

How to delete a folder:

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

1. In the folder tree, select the folder that you want to delete.
2. Click the **Folder-specific actions** icon next to the folder name. Click the **Delete** button.
3. Confirm that you want to delete the folder.

Result: The folder and its objects are permanently deleted.

11.2 Permissions

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

- A description of the permissions can be found in 11.2.1: Which permissions can be granted? (page 178).
- A listing of preset permissions for specific folders can be found in in 11.2.2: Permissions for folders that already exist (page 179) and in 11.2.3: Permissions for new folders (page 179).

You have the following options to set permissions:

- share [180] groupware data like E-Mails, addresses, calendars, tasks
- share [158] files and folders in the *Drive* app

11.2.1 Which permissions can be granted?

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

- Administrator
- Viewer
- Reviewer
- Author

You can change the preset permissions by granting detailed permissions.

Administrator

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

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

Viewer

A viewer can read all existing objects. A viewer has not other permissions.

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

Reviewer

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

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

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

Detailed permissions

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

- Folders
  - view the folder
  - create objects
  - create objects and subfolders
- read permissions
  - none
  - read own objects
  - read all objects
- write permissions
  - none
  - edit own objects
  - edit all objects
- delete permissions
  - none
  - delete own objects
  - delete all objects

11.2.2 Permissions for folders that already exist

You have the following permissions for folders that already exist:

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

11.2.3 Permissions for new folders

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

- in a personal folder [179]
- in a public folder [179]
- in a shared folder [179]

If you create a new folder in a personal folder:

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

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

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

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

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

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

11.3 Sharing

By sharing groupware data like E-Mails, contacts, appointments and tasks, you can co-operate with other users or external partners. There are the following options:

- Share data for other users or external partners.

  You can share groupware data with other users by granting read or edit access. External partners can only get read permissions.
- Access data shared with you by other users.
- Manage your shares by adding new users, removing users or changing permissions.

Notes:

- The following descriptions show how to share E-Mails, contacts, appointments or tasks. E-Mails can only be shared with internal users, not with external partners. In order to share files and folders in the *Drive* app, use the methods described in 9.6: Sharing (page 158).
- When sharing items, internal users or external partners are granted certain permissions for the shared data. Information on permissions can be found in 11.2: Permissions (page 178).

11.3.1 Sharing data

There are the following options:

- You can share data with read access by creating a public link.

  You can give this link to internal users or external partners. Everyone who gets this link can view the data.

  You can not create a public link for E-Mail folders.
- Invite internal users or external partners per E-Mail to a share. You define which permissions are granted for the share for internal users.

  The invitation E-Mail contains notes for accessing the share. If an external partner accesses the share, the partner will automatically be logged in as guest user.

  Note: The invitation E-Mail is exclusively sent in html format.

Be aware of the following restrictions.

- In order to grant rights for a folder to another user, you have to have the administrator right for that folder.
- You can not share your personal *Inbox* folder. In order to grant other users access to your E-Mail messages, share an E-Mail folder that is located below your *Inbox* folder. Other users have to subscribe to this E-Mail folder then.
- You have the exclusive rights for your personal calendar, contacts, and tasks folders. You can not grant administrator rights for these folders to other users.

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

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

   The window for sharing objects will be opened. It contains a public link for a read access to the share.
3. You have the following options:

   In order to directly send the link per E-Mail, enter the respective E-Mail addresses. You can enter a message for the recipients.

   Per default, the data are shared with read access for an unlimited time. To set a time limit for the access to the shared data, enable **Expires in**. Select a time range.

   To protect the access with a password, enable **Password required**. Enter a password. If you send the public link per E-Mail, the E-Mail contains the password.
4. Click on **Done**.

In order to view the public link again, use the function for editing permissions.

Similar actions

How to invite internal users or external partners to a share: (p. 182)

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

1. Select a folder in the folder tree.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **Invite people**.
   A window opens. Existing permissions will be shown as a list.
3. Enter an E-Mail address in *Add people*. The E-Mail address will be added to the list as internal user, group or guest. Preset permissions are granted.
   If required, enter a message.
4. To edit the permissions for internal users, you have the following options.
   To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.
   To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu.
5. Click on **Save**.

Tip: A shared folder is marked with the **Shared** icon . If clicking the icon, the window for adjusting the permissions opens.
In order to view the public link again, use the function for editing permissions.

Similar actions

How to share data with read access by using a public link: (p. 181)

11.3.2 Accessing shared data

In the folder tree, you have access to data shared with you by other users.

How to access data shared by other users:

1. Open the shared folder in the folder tree. Depending on the app, you can find these folders below *Shared address books*, *Shared calendars*, *Shared tasks*.
   If a user shared data with you, a folder named after the user will be displayed.
   Tip: To see the permissions that have been granted for the shared folder, click the **Folder-specific actions** icon . Click on **Existing shares**.
2. Open the folder to display its contents.
3. Select one or several objects. Use the function bar entries.
   Note: Depending on whether the objects are shared with read or edit rights, different functions can be available.

11.3.3 Managing own shares

In order to organize own shares, you can do the following:

- edit the existing permissions, e.g. by changing the read permission for a certain user into write permissions
- add new permissions by granting permissions to an additional user
- remove existing permissions for certain users

How to edit existing permissions:

1. Select a folder in the folder tree.
2. Click the **Shared** icon next to the folder name. The window for adjusting the permissions opens.
3. Use the following methods:

   To adjust a user role, click on the entry in **Current role**. Select an entry from the menu.

   To adjust the permission details, click on the entry in **Detailed access rights**. Select a permission from the menu.

   Notes:

   You cannot change the administrative rights of a personal folder.

   Permissions can not be changed for public links.

   Guests only get read permissions. You can not change this permission.
4. Click on **Save**.

Similar actions

How to add new permissions: (p. 183), How to remove permissions for single users: (p. 183)

How to add new permissions:

1. Select a folder in the folder tree.
2. Click the **Shared** icon next to the folder name. The window for adjusting the permissions opens.
3. Enter an E-Mail address in *Add people*. The E-Mail address will be added to the list as internal user, group or guest. Preset permissions are granted.
4. Click on **Save**.

Similar actions

How to edit existing permissions: (p. 183), How to remove permissions for single users: (p. 183)

How to remove permissions for single users:

1. Select a folder in the folder tree.
2. Click the **Shared** icon next to the folder name. The window for adjusting the permissions opens.
3. In order to remove a user's permissions, click the **Actions** icon next to the user's name. Click on **Revoke access** in the menu.
4. Click on **Save**.

Similar actions

How to edit existing permissions: (p. 183), How to add new permissions: (p. 183)

11.4 Subscriptions

Subscriptions allow using data from social networks within the groupware. The following options exist:

- Import contacts from social networks by subscribing to those data.
- Keep the overview of your subscribed data by managing them on a common overview page.

11.4.1 Subscribing to data

The following options exist:

- Subscribe contacts from social networks.
- Subscribe appointments from your Google calendar.
- Refresh subscribed data
- Disable, enable, change or delete a subscription. Information can be found in Managing subscribed folders (page 185)

How to subscribe data from a social network:

1. Select a private contacts folder in the *Address Book* application.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **New subscription**.
3. In the *Subscribe* window, select the data to be subscribed:
   Select the data source from the *Source* drop-down field.
   If you have already set up an account, select the name of the account with the data source in *Account*.
   If you have not set up an account yet, click on *Add new account*. Follow the instructions.
4. If the data are to be subscribed to a new folder, enable **Add new folder for this subscription**.
   Note: If you do not enable this option, the data will be imported to your personal contact folder.
5. Click on **Subscribe**. The data are imported. This can take a while.

Tip: A folder with subscribed data is marked with the **Cloud** icon . If clicking the icon, the *Subscriptions* settings are opened.

How to subscribe appointments from your Google calendar:

1. Select a private calendar folder in the *Calendar* application.
2. Click the **Folder-specific actions** icon next to the folder name. Click on **New subscription**.
3. In the *Subscribe* window, select the data to be subscribed:
   Select the data source from the *Source* drop-down field.
   Enter the username and password for your Google account.
4. If the data are to be subscribed to a new folder, enable **Add new folder for this subscription**.
5. Click on **Subscribe**. The data are imported. This can take a while.

How to refresh subscribed data:

Together with the objects, subscribed data are refreshed in regular intervals. You can also manually refresh subscribed folder data.

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the sidebar, click on **Subscriptions**.
3. Click on **refresh** next to a subscription in the display area.

11.4.2 Managing subscribed folders

In order to get an overview of your subscribed data and to manage them you can:

- show all subscriptions
- disable or enable a subscription
- edit a subscription's settings
- remove a subscription
- edit or remove a social network's account

How to display all subscriptions:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the sidebar, click on **Subscriptions**.
3. Use the following functions to view more details:

   To show the folder of the subscription, click on the navigation path below the subscription's name.

Tip: You can only view information for a specific folder. To do so, click the **Subscriptions** icon next to a folder with subscriptions, in the folder tree.

How to disable or enable a subscription:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the sidebar, click on **Subscriptions**.
3. Click on **Disable** or **Enable** in the display area next to a subscription.

How to edit a subscription's settings:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the sidebar, click on **Subscriptions**.
3. Click on **Edit** next to a subscription in the display area.
4. Change the settings. In order to finish the process, click on **Subscribe**.

How to remove a subscription:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. In the sidebar, click on **Subscriptions**.
3. Click the **Delete** icon next to a subscription in the display area.

How to set up an account for accessing social networks:

1. Click the **System menu** icon on the right side of the menu bar. Click the **Settings** menu item.
2. Click on **Mail and Social Accounts** in the sidebar.
3. Click on **Edit** next to an account in the display area. Change the settings in the *Account settings* window.

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

12 Data interchange

Learn how to exchange data with other applications.

- You can import appointments, tasks, and contacts created with other applications.
- You can export appointments, tasks, and contacts.

12.1 Importing Data

The import functions allow to import data created in other applications. There are the following options:

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

12.1.1 Importing appointments and tasks in iCal format

The following information help you with successfully importing data in iCal format:

- Which iCal objects are imported?
- Which iCal object properties are not supported?
- Accomplishing an iCal import

12.1.1.1 Which iCal objects are imported?

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

The following table shows which iCal objects are imported and which are not. The information in the columns "Appointments" and "Tasks" have the following meaning:

- "X" means the object is imported. The object value is set in RFC2445.
- A number like "255" means the object is imported. The number indicates the maximum number of characters.
- The entry "unlimited" means the object is imported. There is no limit for the maximum number of characters.
- The entry "-" means the object is not imported.

Category	iCal object	Appointments	Tasks
Calendar Properties	CALSCALE	-	-
	METHOD	-	-
	PRODID	X	X
	VERSION	X	X
Calendar Components	VALARM	X	X
	VEVENT	X	X
	VFREEBUSY	-	-
	VJOURNAL	-	-
	VTIMEZONE	X	X
	VTODO	X	X
Component Properties	ATTACH	-	-
	ATTENDEE	X	X
	CATEGORIES	X	X
	CLASS	X	X
	COMMENT	-	-
	COMPLETED	-	X
	CONTACT	-	-
	CREATED	X	X
	DESCRIPTION	Unlimited	Unlimited
	DTEND	X	X
	DTSTAMP	X	X
	DTSTART	X	X
	DUE	X	X
	DURATION	X	X
	EXDATE	X	-
	EXRULE	-	-
	FREEBUSY	-	-
	GEO	-	-
	LAST-MODIFIED	-	-
	LOCATION	255	-
	ORGANIZER	-	-
	PERCENT-COMPLETE	-	X
	PRIORITY	-	X

Category	iCal object	Appointments	Tasks
	RDATE	-	-
	RECURRENCE-ID	-	-
	RELATED-TO	-	-
	REPEAT	-	-
	REQUEST-STATUS	-	-
	RESOURCES	X	-
	RRULE	X	X
	SEQUENCE	-	-
	STATUS	-	X
	SUMMARY	255	255
	TRANSP	-	X
	TRIGGER	X	X
	TZID	X	X
	TZNAME	X	X
	TZOFFSETFROM	X	X
	TZOFFSETTO	X	X
	TZURL	X	X
	UID	X	X
	URL	-	-
Property Parameters	CUTYPE	X	X
	DELEGATED-FROM	-	-
	DELEGATED-TO	-	-
	DIR	-	-
	ENCODING	X	X
	FMTTYPE	-	-
	FBTYPE	-	-
	LANGUAGE	-	-
	MEMBER	-	-
	PARTSTAT	-	-
	RANGE	-	-
	RELATED	-	-
	RELTYPE	-	-
	ROLE	-	-

Category	iCal object	Appointments	Tasks
	RSVP	-	-
	SENT-BY	-	-
	TZID	X	X
	VALUE	X	X

12.1.1.2 Which iCal object properties are not supported?

Be aware of the following restrictions.

- Appointments such as "The last Sunday of a month" are supported. Appointments with days counted from the end of the month are not supported. Example: The second last Sunday of a month. If an appointment includes such information the appointment is not imported.
- Alarm repetition is not supported. Example: "Remind me four times". If an appointment contains such information that information is ignored.

12.1.1.3 Accomplishing an iCal import

Note the following when importing iCal data.

- Make sure the file you want to import contains correct iCal data.

How to import appointments or tasks in the iCal format:

1. Launch the *Calendar* or *Tasks* app.
2. Select the folder for importing appointments or tasks to in the folder tree.
3. Click the **Folder-specific actions** icon next to folder name. Click on **Import**.
4. Click on **Select file** in the *Import into* window. Select a file in iCal format.
5. Click on **Import**.

Result: The appointments or tasks are added to the folder.

12.1.2 Importing contacts in the vCard format

Note the following when importing vCard data.

- Make sure the file to be imported contains correct vCard data.
- For each contact only one private and one business address are imported. If the imported vCard file contains additional private and business addresses, those addresses are ignored when importing.

How to import contacts in vCard format:

1. Launch the *Address Book* app.
2. Select the folder for importing the contacts to in the folder tree.
3. Click the **Folder-specific actions** icon next to folder name. Click on **Import**.
4. Select the *vCard* format in the *Import into* window. Click on **Select file**. Select a file in the vCard format.
5. Click on **Import**.

Result: The contacts are added to the folder.

12.1.3 Importing contacts in the CSV format

The following CSV files are supported:

- Standard CSV files with comma separated values
- CSV files from the following Microsoft Outlook versions:
  - Microsoft Outlook 2003, 2007
  - German, English, and French language versions

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

How to import contacts from a CSV file:

1. Launch the *Address Book* app.
2. Select the folder for importing the contacts to in the folder tree.
3. Click the **Folder-specific actions** icon next to folder name. Click on **Import**.
4. Select the data format. Click on **Import**.

Result: The contacts are added to the folder.

12.2 Exporting Data

With the Export function you can export certain data to a file for use with other programs. You can export the following data:

- Contacts in the following formats:
  - CSV
  - vCard
  - hCard
- Appointments in the following formats:
  - iCalendar
- Tasks in the following formats:
  - iCalendar

Those formats are standardized and can be imported by many other programs. There are the following options:

- exporting a folder's data.

12.2.1 Exporting folder data

You can export the following objects:

- Contacts in a personal or public contacts folder.
- Appointments in a personal or public calendar folder
- Tasks in a personal or public tasks folder.

How to export a folder's objects:

1. Select a personal or public folder in the folder tree.
2. Click the **Folder-specific actions** icon next to folder name. Click on **Export**.
3. Select a data format. Click on **Export**.

13 Questions and Answers

General questions

Where can I find my personal data and settings?

You can customize the following data and settings:

- Learn how to change your personal data.
- Learn how to customize the basic settings.
- Learn how to set up additional E-Mail accounts [73].

How can I change my password?

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

Why can particular buttons or input fields not be found?

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

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

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

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

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

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

Questions about E-Mails and contacts

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

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

- Enter all recipients in the input fields **To...**, **Copy to...** or **Blind copy to...**. Use the auto-complete function to more easily enter the addresses. This FAQ list provides an explanation of the differences between the input fields.
- If you regularly send E-Mails to the same group of people, create a distribution list in the *Address Book* app and add the E-Mail addresses to the distribution list. Information can be found in Creating distribution lists (page 86).

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

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

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

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

Make use of the ability to save E-Mails as drafts. Information can be found in Working with E-Mail drafts (page 63).

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

For many E-Mail service providers you can set up external E-Mail accounts, e.g. for Google Mail. You only need your account data for the respective provider. As soon as you set up the external E-Mail account you have access to the E-Mails from within the folder tree. Information can be found in E-Mail Accounts (page 73).

How can I automatically forward E-Mails to my replacement?

Enable the function *Auto Forward* in the settings. Information can be found in Automatically forwarding E-Mails (page 59).

How to keep the overview over my E-Mail accounts inboxes??

Use Unified Mail to display the inboxes of multiple E-Mail accounts in a central folder. Information can be found in Using Unified Mail (page 67).

How can I use the conditions in E-Mail filter rules?

You can create a condition by

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

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

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

  The condition is met for the subject "minutes".

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

  The condition is met for the subject "minutes".

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

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

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

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

  The condition is also met for the subject "organisation".

  The condition is not met for the subject "Organic".

How can I use the contacts from my social networks?

You can use the contacts from your social networks by subscribing to the contacts. Information can be found in Subscribing to data (page 184).

Questions about tasks, calendars, and appointments

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

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

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

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

Use the *Reminder* function in the display area of the *E-Mail* app. Information can be found in Creating E-Mail reminders (page 63).

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

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

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

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

How do I use the calendar or tasks recurrence settings?

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

Starts on 07-01-2013

Daily

The event is repeated every 2 days.

The series ends after 5 appointments or tasks.

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

Starts on 08-01-2013

Weekly

The event is repeated every week on Tuesday, Friday.

The series never ends.

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

Starts on 09-01-2013

Weekly

The event is repeated every 2 weeks on Wednesday.

The series ends on 27-03-2013.

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

Starts on 04-02-2013

Monthly

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

The series ends after 12 appointments.

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

Starts on 29-11-2013

Yearly

The event is repeated every last Friday in November.

The series never ends.

How to find free times when creating appointments?

Click on **Find a free time** when creating an appointment or click the **Scheduling** icon in the toolbar. Information can be found in Scheduling appointments with several participants (page 118).

Questions about data organization and team work

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

You can also give external partners access to your groupware address books' contacts or to your social networks' contacts like LinkedIn. To do this proceed as follows:

1. Add contacts from your social networks to an address book.
2. Create a new contacts folder. Copy all contacts that you want to share from your address books to this contact's folder.
3. Share this contact folder. Information can be found in Sharing (page 158).

How can I share specific documents with my external partners?

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

1. In the *Drive* app, you can collect the documents in a separate folder.
2. Share this folder. Information can be found in Sharing (page 158) .

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

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

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

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

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

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

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

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

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

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

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

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