# Documents

## User Guide

# Documents: User Guide

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# Table of Contents

**1 About This Documentation ..................................................... 5**

**2 What is Documents for? ..................................................... 7**

**3 Text ..................................................... 9**

3.1 The *Text* Components ..................................................... 10

3.2 The *Text* Edit Page Components ..................................................... 11

3.3 Creating Text Documents ..................................................... 14

3.4 Editing Text Documents ..................................................... 15

3.5 Editing Text Documents Under a New Name ..................................................... 16

**4 Spreadsheet ..................................................... 17**

4.1 The *Spreadsheet* Components ..................................................... 18

4.2 The *Spreadsheet* Edit Page Components ..................................................... 19

4.3 Creating Spreadsheets ..................................................... 22

4.4 Editing Spreadsheets ..................................................... 23

4.5 Editing Spreadsheets Under a New Name ..................................................... 24

**5 Templates ..................................................... 25**

5.1 Using Templates ..................................................... 26

5.2 Creating Templates ..................................................... 27

5.3 Organising Templates ..................................................... 28

**6 Collaboration ..................................................... 29**

6.1 Editing Documents together ..................................................... 30

**Index ..................................................... 31**

# 1 About This Documentation

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

- Who is the Target Group for this Documentation?
- Which Contents are Included in the Documentation?
- Additional Help

**Who is the Target Group for this Documentation?**

This documentation is addressed to end users who want to create and edit Office documents from within the groupware and who want to share them with others.

**Which Contents are Included in the Documentation?**

This documentation includes the following information:

- In *What is Documents for?* you will find a short description of Documents.
- In *Text* you will find instructions for using the Text app.
- In *Spreadsheet* you will find instructions for using the Spreadsheet app.
- In *Collaboration* you will find notes and instructions for collaborating with other users.

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.

**Additional Help**

Comprehensive groupware documentation can be found in the OX App Suite User Guide.

# 2 What is Documents for?

*Documents* offers various functions for editing Office documents from within the groupware.

- Use formatted text documents for your correspondence. Use tables and images within the documents.
- Use spreadsheets in the native Microsoft Excel format in order to work with figures, spreadsheets and formulas.
- Edit a document together with other users.
- Make use of the other groupware apps to organise your documents, to send them by E-Mail or share them with users or external partners.

In *Documents*, the following apps are available:

- The *Text* [9] app for creating and editing text
- The *Spreadsheet* [17] app for creating and editing spreadsheets.

# 3 Text

Learn how to work with the *Text* application.

- The *Text* Components
- The *Text* Edit Page Components
- create text documents
- edit text documents
- edit a document under a new name [16]

In order to search for text files, organize them or share them with other users, use the *Files* application.

### How to launch the *Text* app:

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

## 3.1 The *Text* Components

**Tool bar**

Contains the following functions:

- **New text document** button. Creates a **new text document** [14].
- **Open text document** button. Opens an **existing document** [15].

**Recent documents**

Contains a list of recently opened documents. Click on a document to open it.

**New from template**

Contains a list of templates for various documents. Click on a template to create a new document. The new document will be a copy of the template.

When creating a new text document or editing an existing text document, the Edit text page opens.

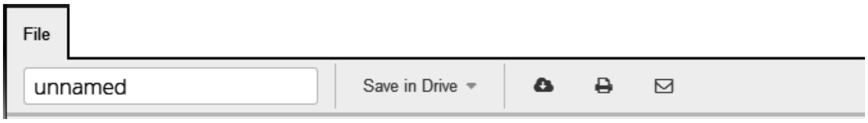
## 3.2 The *Text* Edit Page Components

### Office menu bar

The Office menu bar includes the following elements:

- **File** tab. Shows the *File* tool bar that allows applying file functions.
- **Format** tab. Shows the *Format* tool bar that allows formatting the document's content.
- **Insert** tab. Shows the *Insert* tool bar that allows inserting tables, images, text frames, hyperlinks, tab stops, line or page breaks in the text.
- Notifications about saving process. Notify whether all changes in the document have been saved.
- **Review** tab. Shows the *Review* tool bar that allows using spell checking tools and tools for tracking changes.
- **Revert** icon . Reverts the last operation.
- **Recover** icon . Recovers the last reverted operation.
- **Toggle Search** icon . Displays control elements for searching for or replacing text strings.
- **View** button. Opens a menu with the following entries:
  - Functions for zooming in or zooming out the text.
  - **Show tool bars** checkbox. Defines whether the tool bars are always displayed.
  - **Show collaborators** checkbox. Defines whether the document editors list is displayed. This function is only activated if you edit the document together with other users [30].
- **Close document** icon . Closes the Format window.

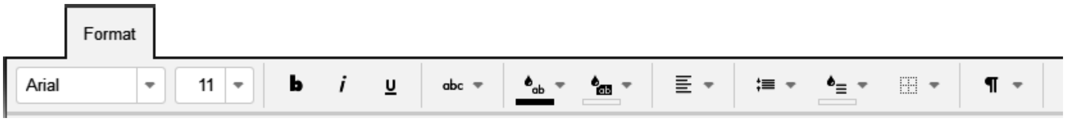
### *File* tool bar



Contains the following tools:

- **Rename document** input field. To rename the document, click on the file name.
- **Save in Drive** button. Opens a menu with the following entries:
  - **Save as**. Saves the selected document under a different name or in another folder.
  - **Save as template**. Saves the selected document as a template.
  - **AutoSave** checkbox. Defines whether the document gets saved automatically in regular intervals.
- **Download** icon . Downloads the selected document.
- **Print** icon . Displays the current document in a print dialogue. Use the control elements in the upper part of the dialogue to print the document or to save it as a PDF file.
- **Send as e-mail** icon . Sends the selected document as an E-Mail attachment.

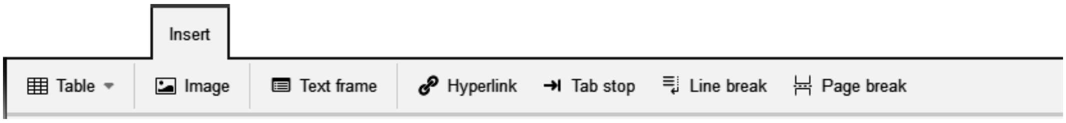
### *Format* tool bar


Format
Arial
11
abc

Contains the following tools:

- character formatting tools
  - font family, font size
  - emphasis
  - metrics
  - text colour, text highlight colour
- paragraph formatting tools
  - paragraph alignment, line spacing
  - paragraph fill colour, paragraph borders
  - paragraph style, clear formatting
  - bullet list, numbered list, demote one level, promote one level

### *Insert* tool bar


Insert
Table
Image
Text frame
Hyperlink
Tab stop
Line break
Page break

Contains the following tools:

- insert table
- insert image
- insert text frame
- insert or edit hyperlink
- insert tab stop, insert line break, insert page break

### *Table* tool bar

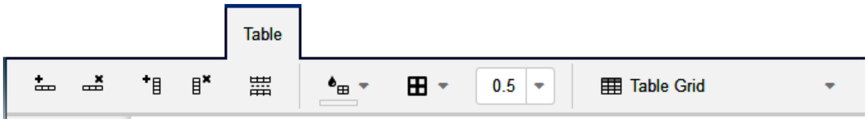


Table
0.5
Table Grid

If the cursor is located within a table, the *Table* tool bar is displayed. It contains the following tools:

- insert row, delete selected rows, insert column, delete selected columns
- split table
- select cell fill colour, select cell borders, select cell border width
- assign table style A table style consists of predefined cell borders and fill colors for specific table cells and rows.

### *Image* tool bar

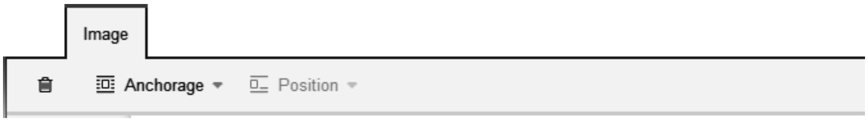
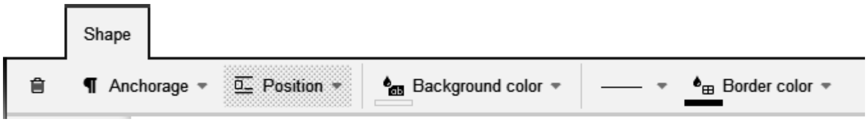


Image
Anchorage
Position

If an image has been selected, the *Image* tool bar will be displayed. It contains the following tools:

- Delete image
- Adjust position. Defines whether the image is anchored inline, to a paragraph or to the page.
- Adjust the position. If the image is anchored to a paragraph or a page, you can define the text wrapping.

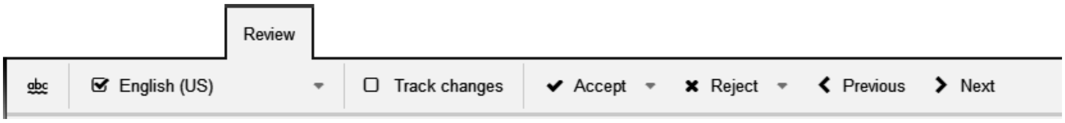
### *Shape* tool bar


Shape
Anchorage
Position
Background color
Border color

If a text frame has been selected, the *Shape* tool bar will be displayed. It contains the following tools:

- Delete text frame
- Adjust position. Defines whether the text frame is anchored inline, to a paragraph or to the page.
- Adjust the position. If the text frame is anchored to a paragraph or a page, you can define the text wrapping.
- Adjust the background colour for the text frame's content.
- Adjust the border style and colour for the text frame border.

### *Review* tool bar


Review
abc
English (US)
Track changes
Accept
Reject
Previous
Next

Contains the following tools:

- enabling the spellchecker
- selection of the document's language
- enabling change tracking
- accepting the selected change or all changes
- rejecting the selected change or all changes
- selecting the previous or the next change

### Document window

The document window is centrally located. It lets you create and edit the document's content.

## 3.3 Creating Text Documents

You can create text documents containing formatted text, tables, and images. In order to create a new text document, you can proceed as follows:

- create a text document in the *Text* app. You can also use a template.
- create a text document in the *Files* app

### How to create a new text document:

1. To create a new text document without using a template, click on **New text document** in the tool bar in the *Text* app.

   To use a template, click on a template in *New from Template*. Information on templates can be found in *Templates* (page 25).

   The document is shown on the *unnamed* page.
2. Click on **unnamed** in the **File** tool bar. Enter a name.
3. Create and edit the document's content. To edit the document, use the common techniques from familiar Office applications.

   Note the details about the text editing functions.
4. To finish, click the **Close document** icon ☒ on the right side of the Office menu bar.

### How to create a new text document in the *Files* app:

1. Launch the *Files* 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 on **New** in the tool bar. Click on **New text document**.
4. Click on **Unnamed** on the upper right side of the document bar. Enter a name for the text document.
5. Create and edit the document's content. To edit the document, use the common techniques from familiar Office applications.

   Note the details about the text editing functions.
6. To finish, click the **Close document** icon ☒ on the right side of the Office menu bar.

## 3.4 Editing Text Documents

When editing text documents, you can do the following:

- editing text, formatting characters, formatting paragraphs
- downloading or printing the selected document or sending it in an E-Mail
- searching and replacing text

You can open and edit a text document either in the *Text* app or in the *Files* app.

### How to edit a text document:

1. In the *Text* app, click on **Open text document** in the tool bar.

   Select a document in the *Open document* window. Click on **Open**. The text document will be opened for editing.

   You can also click on a document under *Recent Documents*.

2. To edit the text document, use the common techniques from familiar Office applications.

   To format characters or paragraphs or to edit cells, use the functions in the *Format* tool bar.

   **Note:** All changes are immediately saved.

3. To download or print the selected text document or to send it in an E-Mail, use the functions in the *File* tool bar.

4. To search and replace text elements, click the **Toggle search** icon🔍 on the right side of the Office menu bar. Control elements for searching and replacing will be shown.

5. To finish editing and to close the text document, click the **Close document** icon✖ on the right side of the Office menu bar.

### How to open a text document in the *Files* app in order to edit it:

1. Launch the *Files* app.

2. Open a folder containing text documents, in the folder tree.

   **Note:** Open a folder for which you have the permission to create objects.

3. Click on a text document in the display area. Click on **Edit** in the pop-up. The text document will be opened for editing.

   Use the techniques described in the instruction for editing documents.

## 3.5 Editing Text Documents Under a New Name

You can create a new document using a copy of an existing document by editing the existing document under a new name.

### How to edit a document under a new name:

1. Launch the *Files* app.
2. Open a folder containing documents, in the folder tree.

   **Note:** Open a folder for which you have the permission to create objects.
3. Click on a document in the display area. In the pop-up, click the **More** icon≡▾. Select **Edit as new**. The document will be opened for editing.
4. Click on **Unnamed** on the upper right side of the document bar. Enter a name for the document.
5. You can now use the functions for editing a text document.

# 4 Spreadsheet

Learn how to work with the *Spreadsheet* application.

- The *Spreadsheet* Components
- create spreadsheets
- edit spreadsheets
- edit a spreadsheet under a new name [24]

In order to search for spreadsheets, organise them or share them with other users, use the *Files* application.

### How to launch the *Spreadsheet* app:

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

## 4.1 The *Spreadsheet* Components

**Tool bar**

Contains the following functions:

- **New spreadsheet** button. Creates a **new text document** [22].
- **Open spreadsheet** button. Opens an **existing document** [23].

**Recent documents**

Contains a list of recently opened documents. Click on a document to open it.

**New from template**

Contains a list of templates for various documents. Click on a template to create a new document. The new document will be a copy of the template.

When creating a spreadsheet or editing an existing spreadsheet, the Spreadsheet edit text page opens.

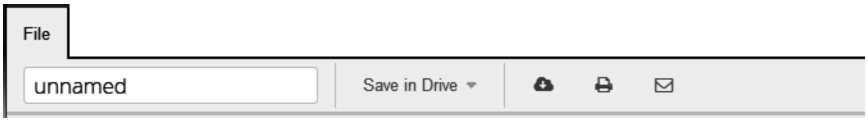
## 4.2 The *Spreadsheet* Edit Page Components

### Office menu bar

The Office menu bar includes the following buttons:

- **File** tab. Shows the *File* tool bar that allows applying file functions.
- **Format** tab. Shows the *Format* tool bar that allows formatting the document's content.
- **Insert** tab. Shows the *Insert* tool bar that allows inserting objects like images, tables or hyperlinks in the text.
- **Rows/Columns** tab. Shows the *Rows/Columns* tool bar that allows using tools for editing rows and columns.
- **Revert** icon . Reverts the last operation.
- **Recover** icon . Recovers the last reverted operation.
- **Toggle search** icon . Displays control elements for searching for or replacing text strings.
- **View** button. Opens a menu with the following entries:
    - Functions for zooming in or zooming out the spreadsheet.
    - **Split table** button. Splits the sheet above and left of the current cursor position.
    - **Freeze sheet** button. Freezes the rows above and the columns to the left of the cursor.
    - **Show tool bars** checkbox. Defines whether the tool bars are always displayed.
    - **Show collaborators** checkbox. Defines whether the document editors list is displayed. This function is only activated if you edit the document together with other users [30].
    - **Show grid lines** checkbox. Defines whether grid lines are displayed.
    - **Show sheet tabs** checkbox. Defines whether tabs for additional sheets are displayed below the spreadsheet.
- **Close document** icon . Closes the Format window.

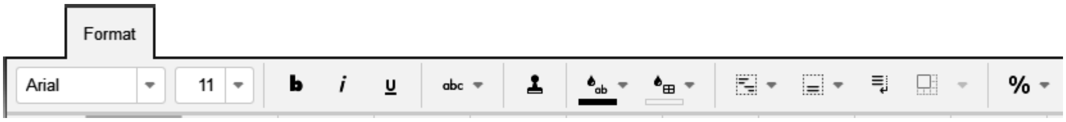
### *File* tool bar



Contains the following tools:

- **Rename document** input field. To rename the document, click on the file name.
- **Save in Drive** button. Opens a menu with the following entries:
    - **Save as**. Saves the selected document under a different name or in another folder.
    - **Save as template**. Saves the selected document as a template.
    - **AutoSave** checkbox. Defines whether the document gets saved automatically in regular intervals.
- **Download** icon . Downloads the selected document.
- **Print** icon . Displays the current document in a print dialogue. Use the control elements in the upper part of the dialogue to print the document or to save it as a PDF file.
- **Send as e-mail** icon . Sends the selected document as an E-Mail attachment.

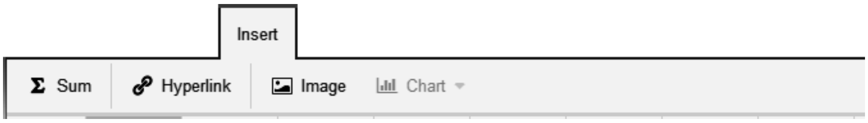
### *Format* tool bar



Contains the following:

- character formatting tools
    - font family, font size
    - emphasis
    - text colour
- cell formatting tools
    - horizontal alignment, vertical alignment, automatic word wrap
    - Number format. Defines the cell content's format, e.g. number.
    - Format codes. Defines the subformat, e.g.: the number of decimal places.
    - cell fill colour
    - cell borders, border style, border colour
    - Merge or unmerge cells.
    - cell style, copy formatting, delete formatting

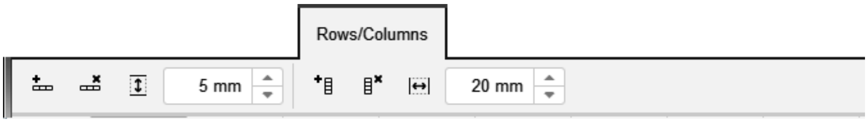
### *Insert* tool bar



Contains the following tools:

- calculate the sum of the selected cells
- insert or edit hyperlink
- insert image
- insert a chart

### *Rows/Columns* tool bar



Contains the following tools:

- insert row, delete selected row, set the row height
- insert column, delete selected column, set the column width

### *Image* tool bar

If an image has been selected, the *Image* tool bar will be displayed. It contains the following tools:

- Delete image

### *Chart* tool bar

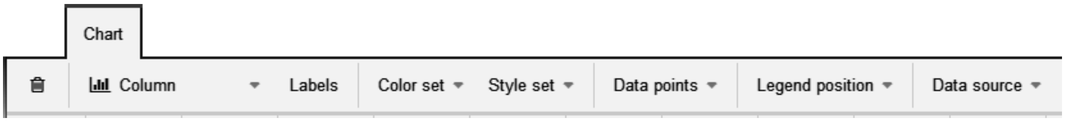


Chart
Column
Labels
Color set
Style set
Data points
Legend position
Data source

If a chart has been selected, the *Chart* tool bar will be displayed. It contains the following tools:

- delete chart
- define chart type, e.g. column, line, pie
- set labels for axes, set colours, select style set
- set labels and colours for data points
- hide or show legend, set legend position
- adjust data source

### Document window

The document window is centrally located. It lets you create and edit the document's content.

## 4.3 Creating Spreadsheets

You can create spreadsheets containing formatted tables and images. In order to create a spreadsheet, you can proceed as follows:

- create a spreadsheet in the *Spreadsheet* app. You can also use a template.
- create a spreadsheet in the *Files* app

### How to create a new spreadsheet:

1. To create a new spreadsheet without using a template, click on **New spreadsheet** in the tool bar in the *Spreadsheet* app.

   To use a template, click on a template in *New from Template*. Information on templates can be found in *Templates* (page 25).

   The spreadsheet is shown on the *unnamed* page.
2. Click on **unnamed** in the **File** tool bar. Enter a name.
3. Create and edit the document's content. To edit the document, use the common techniques from familiar Office applications.

   Note the details about the spreadsheet editing functions.
4. To finish, click the **Close document** icon☒ on the right side of the Office menu bar.

### How to create a new spreadsheet in the *Files* app:

1. Launch the *Files* app.
2. Open a folder in the folder tree.

   **Note:** Open a folder for which you have the appropriate permissions to create objects.
3. Click the **New** icon in the tool bar. Click on **New spreadsheet**.
4. Click on **Unnamed** on the upper right side of the document bar. Enter a name for the document.
5. Create and edit the document's content. To edit the document, use the common techniques from familiar Office applications.

   Note the details about the spreadsheet editing functions.
6. To finish, click the **Close document** icon☒on the right side of the Office menu bar.

## 4.4 Editing Spreadsheets

When editing spreadsheets, you can do the following:

- editing spreadsheets, formatting cells, editing formulas
- downloading or printing the selected spreadsheet or sending it in an E-Mail
- searching and replacing text

You can open and edit a document either in the *Spreadsheet* app or in the *Files* app.

### How to edit a spreadsheet:

1. In the *Spreadsheet* app, click on **Open spreadsheet** in the tool bar.

   Select a document in the *Open spreadsheet* window. Click on **Open**. The spreadsheet will be opened for editing.

   You can also click on a document under *Recent Documents*.
2. To edit the document, use common techniques from familiar Office applications.

   To format characters or paragraphs, use the tools in the document bar.

   **Note:** All changes are immediately saved.
3. To download or print the selected spreadsheet or to send it in an E-Mail, use the icons to the left side of the tool bar.
4. To search and replace text elements, click the **Toggle search** icon🔍 on the right side of the Office menu bar. Control elements for searching and replacing will be shown.
5. To finish editing and to close the spreadsheet, click the **Close document** icon✖on the right side of the document bar.

### How to open a spreadsheet in the *Files* app in order to edit it:

1. Launch the *Files* app.
2. Open a folder containing spreadsheets, in the folder tree.

   **Note:** Open a folder for which you have the permission to create objects.
3. Click on a spreadsheet in the display area. Click on **Edit** in the pop-up. The spreadsheet will be opened for editing.

   Use the techniques described in the instructions for editing documents.

## 4.5 Editing Spreadsheets Under a New Name

You can create a new document using a copy of an existing document by editing the existing document under a new name.

### How to edit a document under a new name:

1. Launch the *Files* app.
2. Open a folder containing documents, in the folder tree.

   **Note:** Open a folder for which you have the permission to create objects.
3. Click on a document in the display area. In the pop-up, click the **More** icon≡▾. Select **Edit as new**. The document will be opened for editing.
4. Click on **Unnamed** on the upper right side of the document bar. Enter a name for the document.
5. You can now use the functions for editing a spreadsheet.

# 5 Templates

Learn how to work with templates.

- When creating a new document, you can use an existing template [26].
- You can create a new template [27] from the document that you are currently editing.
- You can organise [28] templates in folders.

## 5.1 Using Templates

Depending on the server configuration, different global templates are available for text documents or spreadsheets. If using a template when creating a new document, the new document will be a copy of this template.

### How to use a template when creating a new document:

Click on a template under *New from Template* in the *Text* or *Spreadsheet* app.

The new document is shown on the *unnamed* page.

## 5.2 Creating Templates

You can create your own templates by saving the document that you are currently editing as a new template. The new template will be saved below *My files* in the *Files* app. You can organise [28] your own templates in template folders.

### How to create a new template:

1. Open an existing document or create a new one in the *Text* or *Spreadsheet* app.

   **Tip:** In order to change a global template, create a new template from the global template that you want to change.
2. Edit the content according to your wishes.
3. In the **File** tool bar, click on **Save in Drive**. Select **Save as template**.

   Enter a name. Click on **Save**.
4. In order to finish editing the template, click the **Close document** icon✖

## 5.3 Organising Templates

In order to keep an overview, you can organise your own templates in template folders. When creating a new document, all templates matching the document type will be displayed from all template folders. The following options are available:

- create a new template folder by defining a folder as template folder
- delete a template folder

### How to create a new template folder:

1. In the *Files* app, create the new personal folder that you want to use for the templates.

   If you have already created templates, you can move those templates to the new folder now.
2. Click the **System menu** icon⚙ on the right side of the menu bar. Click the **Settings** menu item.
3. Select **Documents** from the side bar.
4. Click on **Add new template folder** in the display area. Select the new folder. Click on **OK**. The new template folder will be saved below *Template folders*.

**Tip:** In order to open the template folder in the *Files* app, click on the path below its name.

**Note:** In order to delete, move or rename your own templates, use the *Files* app functions.

### How to remove a template folder:

1. Click the **System menu** icon⚙ on the right side of the menu bar. Click the **Settings** menu item.
2. Select **Documents** from the side bar.
3. Click the **Delete** icon🗑 next to a template folder in the display area.

**Note:** Neither the template folder nor the templates within will be deleted during this process. As a result of this process, the templates will no longer be displayed when creating new documents.

# 6 Collaboration

Learn how to work together with other users or external partners.

- You can share documents with other users or external partners. Information and instructions can be found in the OX App Suite user guide, under the topic *Files and Teams*.
- You can edit a document together with other users [30].

## 6.1 Editing Documents together

Documents saved on the groupware server can be edited together with other users. To do so, the documents have to be saved in a public or shared folder. The users need to have write permissions for this folder. The following rules apply:

- The user who creates the document or opens it first, has editing permissions for the document. This user is called editor. Each user who later opens the document gets read permissions. Those users are called viewers.
- The viewers can see all changes applied by the editor.
- A viewer can become editor by requesting editing permissions. As soon as the previous editor completes the changes, the server transfers the editing permissions to the new editor.
- As soon as the current editor closes the document, a new version of the document is created on the server.

### How to edit a document together with other users:

1. Create a new document or open an existing document.

   Ensure that the users with whom you want to edit the document have the required permissions for editing the document. Information and instructions can be found in the OX App Suite user guide, under the topic *Permissions*.
2. Inform other users that you want to edit the document together with them. The respective users need to open the document. When having opened the document, the users can see who is currently editing the document.

   Each change you apply to the document will be visible to the viewers.

   Each user can see the cursors of the other users. The cursors are highlighted with different colors. In order to view the user name, hover over the cursor.

   **Tip:** In order to display a list of users who have opened the document, click on the Office menu item **View** and enable the **Show collaborators** checkbox.
3. in order to edit the document, the user has to click on **Edit** in the tool bar.
4. To finish, the current editor has to click the **Close document** icon ☒ on the right side of the Office menu bar.

# Index

## A

App Spreadsheet, 17
App Text, 9
Apps
  Spreadsheet, 17
  Text, 9

## C

Collaboration, 29
Create
  spreadsheets, 22
  text document, 14

## D

Documentation, 5
Documents, 7

## E

Edit
  edit documents together, 30
  spreadsheets, 23
  text documents, 15
edit under a new name
  spreadsheets, 24
  text documents, 16

## S

Spreadsheet, 17
  Components, 18
  edit page, 19
Spreadsheets
  create, 22
  download, 23
  edit, 23
  edit under a new name, 24
  print, 23
  search and replace, 23

## T

Templates, 25
  create, 27
  organise, 28
  use, 26
Text, 9
  Components, 10
  edit page, 11
Text document
  create, 14
text documents
  download, 15
  edit, 15
  edit under a new name, 16
  print, 15
  search and replace, 15