Documents

User Guide

Documents: User Guide

Publication date Wednesday, 23. March 2016 Version 7.8.1
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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 16
3.4 Opening Text Documents 17
3.5 Editing Text Documents 18
3.6 Editing Text Documents Under a New Name 19
3.7 The Text Settings 20

4 Spreadsheet 21

4.1 The *Spreadsheet* Components 22
4.2 The *Spreadsheet* Edit Page Components 23
4.3 Creating Spreadsheets 27
4.4 Opening Spreadsheets 28
4.5 Editing Spreadsheets 29
4.6 Editing Spreadsheets Under a New Name 30
4.7 The Spreadsheet Settings 31

5 Templates 33

5.1 Using Templates 34
5.2 Creating Templates 35
5.3 Editing Templates 36
5.4 Organising Templates 37

6 Collaboration 39

6.1 Editing Documents together 40

Index 41

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. This documentation has been written under the assumption that the end user is familiar with editing text documents and spreadsheets.

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 *Templates* you will find instructions for using text and spreadsheet templates.
- 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 Groupware 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* [21] 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 new text documents
- open existing text documents
- edit text documents
- edit a document under a new name

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

How to launch the *Text* app:

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

3.1 The *Text* Components

The *Text* app includes the following components.

- Tool bar
- Recent documents
- New from template

Tool bar

Contains the following functions:

- **New text document** button. Creates a **new text document** [16].
- **Open text document** button. Opens an **existing document** [18].

Recent documents

Contains a list of recently opened documents. The following functions are available.

- If the cursor hovers over a document name, the file name and the document's path are displayed.
- If clicking on a document, the document will be opened.
- A document's context menu contains functions for editing, downloading and for organising the list.

New from template

Contains a list of templates for various documents. The following functions are available.

- If clicking on a template, a new document will be created. The new document will be a copy of the template.
- A template's context menu contains functions for editing the template and for creating documents.

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

3.2 The *Text* Edit Page Components

The *Text* Edit page contains the following components.

- Office menu bar
- *File* tool bar
- *Format* tool bar
- *Insert* tool bar
- *Table* tool bar
- *Image* tool bar
- *Shape* tool bar
- *Review* tool bar
- Document window

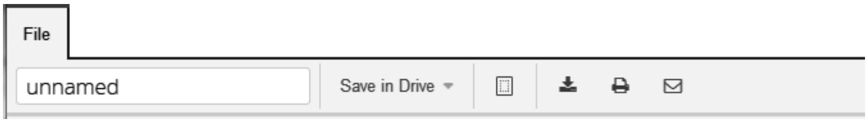
Note: When you have a small screen width, a compact tool bar is displayed. In the compact tool bar, some text is replaced with icons. Multiple menu items are combined in scroll bars.

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 [40].
- **Close document** icon . Closes the Format window.

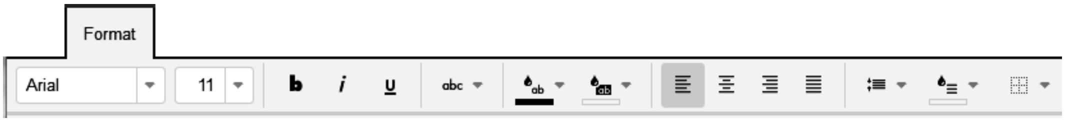
File tool bar



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.
- **Page settings** icon . Opens the *Page settings* dialogue window. The dialogue window contains page configuration tools.
  - Default values for paper formats, page orientation, page margins
  - Input fields for paper size, page margins
- **Download** icon . Downloads the selected document.
- **Print as PDF** icon . Generates a PDF version of the current document.
- **Send as e-mail** icon . Sends the selected document as an E-Mail attachment.

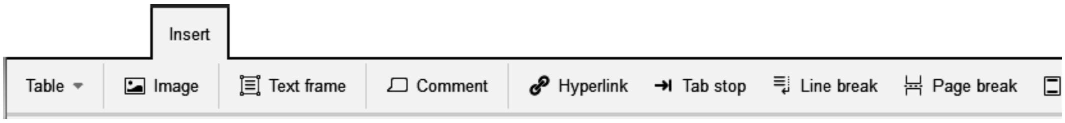
Format tool bar



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



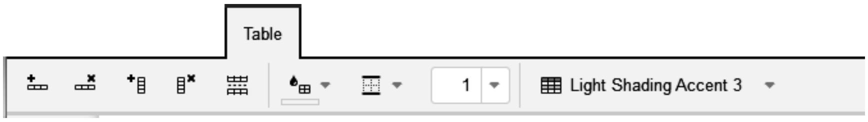
The following elements are available.

- **Table** button
- **Image** button
- **Text frame** button
- **Comment** button. A comment field is displayed at the document's margin. In addition to the comment text, it contains the following:
    - the editor's name
    - the comment's creation date and time
    - icons for editing or deleting the comment

  Functions for hiding and showing comments can be found in *Review* tool bar (page 15).
- **Hyperlink** button
- the buttons **Tab stop**, **Line break**, **Page break**
- **Header & footer** button. Opens an area on top of the page where you can enter the header text. Additional elements are displayed below the header.
    - **Header** button. Opens a menu with the following entries:
        - Settings that allow you to define whether different headers should be used for certain parts of the document.

          Depending on the selected setting, the caption of the **Header** button changes.
        - Removing all headers and footers in the entire document.
    - **Go to footer** button. Opens an area at the bottom of the page where you can enter the footer text.
    - **Close** button. Finishes the editing of the header or footer.
- **Field** button. Opens a menu with functions for inserting fields:
    - author name, file name
    - time, date
    - page number, number of pages

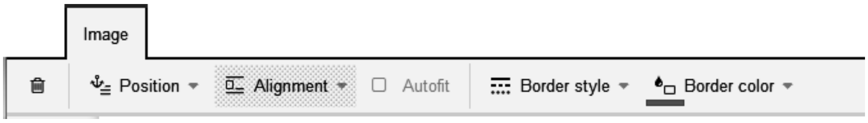
***Table* tool bar**



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.

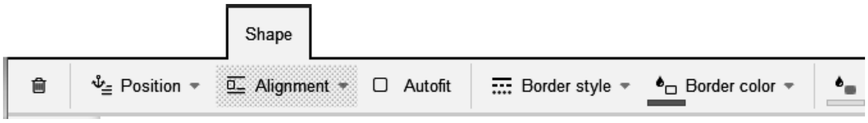
***Image* tool bar**



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.
- Reorder. Defines the order of images and text frames that overlay each other.
- Adjust the border style and colour for the image frame.

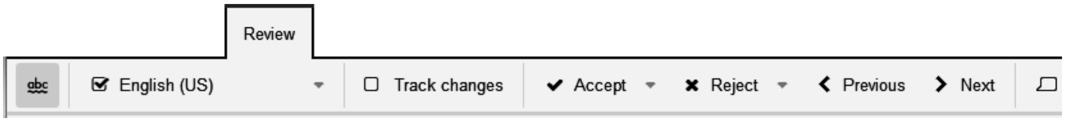
***Shape* tool bar**



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.
- AutoAdjust. Defines whether the text frame height is automatically adjusted to the content.
- Reorder. Defines the order of images and text frames that overlay each other.
- Adjust the border style and colour for the text frame border.
- Adjust the background colour for the text frame's content.

Review tool bar



The following elements are available.

- **Check spelling permanently** icon. Activates the spell check while entering text.
- Selection of the document's language
- **Track changes** button. Enables or disables the change tracking. Additional buttons for handling changes are available:
    - accepting the selected change or all changes
    - rejecting the selected change or all changes
    - selecting the previous or the next change
- **Comment** button. Inserts a comment at the current cursor position. A comment field is displayed at the document's margin. In addition to the comment text, it contains the following:
    - the editor's name
    - the comment's creation date and time
    - icons for editing or deleting the comment

  The function for inserting comments can also be found in the *Insert* tool bar (page 13).
- **Markup** button. Opens a menu that allows to define the visibility of comments.
    - Highlight the current comment or all comments
    - Display comments as bubbles
    - Display no comments
    - Only display comments by a certain author, display comments by each author
- **Back** and **Next** button. Select the previous or next comment.
- **Delete all** button. Deletes all comments in the document.

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
- create a text document in the *Drive* app

You can also use a template.

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

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, use one of the following methods:

   - Click on a template in *New from Template*.
   - Open a template's context menu. Select **New from Template**.

   Information on templates can be found in *Templates* (page 33).

   The document is shown on the *unnamed* page.
2. Click on **unnamed** in the **File** tool bar. Enter a name.

   Now you can create and edit [18] the content.
3. 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 *Drive* app:

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

   To use a template, use one of the following methods:

   - Double-click on the template.
   - Select a template. Click on **New from template** in the tool bar.
   - Open the template in the *Viewer*. Click on **New from template**.
4. Click on **unnamed** in the **File** tool bar. Enter a name.

   Now you can create and edit [18] the content.
5. To finish, click the **Close document** icon ☒ on the right side of the office menu bar.

3.4 Opening Text Documents

You can open text documents that are saved in Drive or on a local drive. The following options are available:

- open a text document in the *Text* app
- open a text document in the *Drive* app
- open a locally saved text document

How to open a text document in the *Text* app:

Use one of the following methods:

- To open a frequently used document, click on a document in *Recent documents*.

  You can also open a document's context menu. Select **Edit**.

  Tip: You can use the context menu to remove documents from the list of recently opened documents.
- In order to open another document, click on **Open document** in the tool bar. Select a text document in the *Open document* window. Click on **Open**.

How to open a text document in the *Drive* app:

Use one of the following methods:

- Select a text document. Click on **Edit** in the tool bar.
- Double-click on a text document.
- Open the text document in the *Viewer*. Click on **Edit**.

How to open a locally saved text document:

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

   In the *Open document* window, select a folder for which you have the appropriate permissions to create objects.
2. Click on **Upload local file**. Select a text document. Click on **OK**.

Result: The document is uploaded to *Drive*. Then, the document will be opened.

3.5 Editing Text Documents

When editing text documents, you can do the following:

- edit text, format characters, format paragraphs
- Insert various elements, e.g. tables, images, text frames, headers and footers, page number
- check the spelling, use comments
- downloading or printing the selected document or sending it in an E-Mail
- searching and replacing text

How to edit a text document:

Note: In order to edit a document, you need to have editing permissions for the *Drive* folder containing the document.

1. Create a new text document [16] or open [17] an existing document.
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.

   To create a new paragraph style from the paragraph at the current cursor position, select **Create new style** from **Paragraph style**.

   To insert various elements, use the *Insert* tool bar. These elements can be inserted:

   - table, image, text frame, comment, hyperlink
   - tab stop, line break, page break
   - header, footer
   - Fields with automatically created contents like author name, file name, date, time, page number, number of pages

   To check the spelling, track changes or manage comments, use the *Check* tool bar functions.

   Tip: Many functions can also be activated in the context menu.

   Note: All changes are immediately saved.
3. To rename, save, 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.

3.6 Editing Text Documents Under a New Name

You can create a new document as a copy of an existing document. The following options are available:

- Edit a recently used document under a new name
- Edit any document under a new name

How to edit a recently used document under a new name:

1. In the *Text* app you can open a document's context menu under *Recent Documents* Select **Edit as new**. The document will be opened for editing.
2. Click on **unnamed** in the **File** tool bar. Enter a name.

   Now you can create and edit [18] the content.

How to edit a document under a new name:

1. Launch the *Drive* 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. Open the document in the *Viewer*. Click the **More** icon≡▾. Select **Edit as new**. The document will be opened for editing.
4. Click on **unnamed** in the **File** tool bar. Enter a name.

   Now you can create and edit [18] the content.

3.7 The Text Settings

How to use the documents settings:

1. Click the **System menu** icon ≡ on the right side of the menu bar. Click the **Settings** menu item.
2. In the side bar, click on **Documents**.
3. Change the settings.

The following settings are available.

Measurements

Defines the measurements for paper size, page margins, line height, column width.

User dictionary

Allows adding entries to the user dictionary.

My template folders

Shows you template folders. Allows adding additional template folders. If clicking on a template folder, the folder will be opened in the *Drive* app. Information on templates and instructions can be found in *Templates* (page 33).

Global template folders

Shows the global template folders. If clicking on a template folder, the folder will be opened in the *Drive* app.

4 Spreadsheet

Learn how to work with the *Spreadsheet* application.

- The *Spreadsheet* Components
- The *Spreadsheet* Edit Page Components
- create new spreadsheets
- open existing spreadsheets
- edit spreadsheets
- edit a spreadsheet under a new name

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

How to launch the *Spreadsheet* app:

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

4.1 The *Spreadsheet* Components

The *Spreadsheet* app includes the following components.

- Tool bar
- Recent documents
- New from template

Tool bar

Contains the following functions:

- **New spreadsheet** button. Creates a **new spreadsheet** [27].
- **Open spreadsheet** button. Opens an **existing document** [29].

Recent documents

Contains a list of recently opened documents. The following functions are available.

- If the cursor hovers over a document name, the document's path is displayed.
- If clicking on a document, the document will be opened.
- A document's context menu contains functions for editing, downloading and for organising the list.

New from template

Contains a list of templates for various documents. The following functions are available.

- If clicking on a template, a new document will be created. The new document will be a copy of the template.
- A template's context menu contains functions for editing the template and for creating documents.

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

4.2 The *Spreadsheet* Edit Page Components

The *Text* Edit page contains the following components.

- Office menu bar
- *File* tool bar
- *Format* tool bar
- *Data* tool bar
- *Insert* tool bar
- *Rows/Columns* tool bar
- *Image* tool bar
- *Chart* tool bar
- Document window

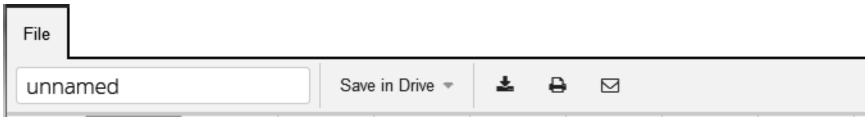
Note: When you have a small screen width, a compact tool bar is displayed. In the compact tool bar, some text is replaced with icons. Multiple menu items are combined in scroll bars.

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.
- **Data** tab. Shows the *Data* tool bar that allows to sort or filter data.
- **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 [40].
    - **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.

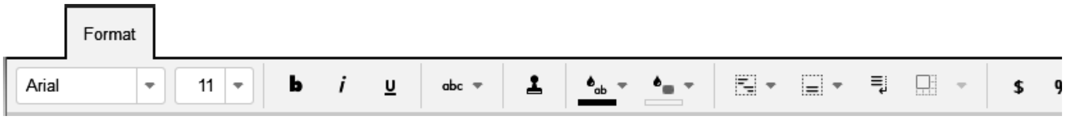
File tool bar



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 as PDF** icon 🖶 . Generates a PDF version of the current document.
- **Send as e-mail** icon ✉ . Sends the selected document as an E-Mail attachment.

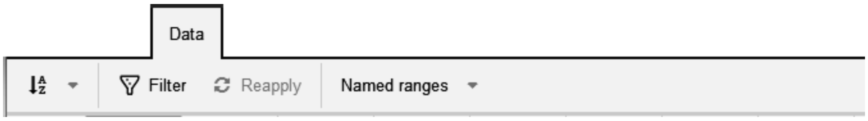
Format tool bar



Contains the following:

- character formatting tools
  - font family, font size
  - emphasis
  - format painter
  - text colour
- cell formatting tools
  - horizontal alignment, vertical alignment, automatic word wrap, merge or unmerge cells
  - currency formatting in percentage terms
  - 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
  - apply cell style

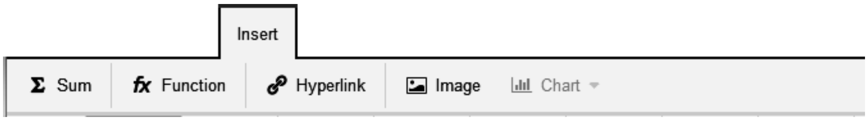
Data tool bar



Contains the following:

- Tools for sorting the selected cells
- Tools for filtering the selected cells
- Tools for creating, editing or displaying named ranges. Within formulas, named ranges can be used instead of the original cell addresses.

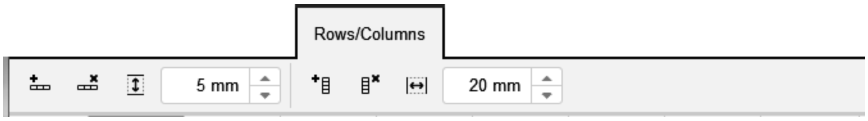
Insert tool bar



Contains the following tools:

- calculate the sum of the selected cells
- Insert a function. Clicking on it opens the *Insert Function* window. The window displays the available functions. If clicking on a function, a function description is displayed.
- insert or edit hyperlink
- insert image
- insert a chart

Rows/Columns tool bar


Rows/Columns
5 mm
20 mm

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

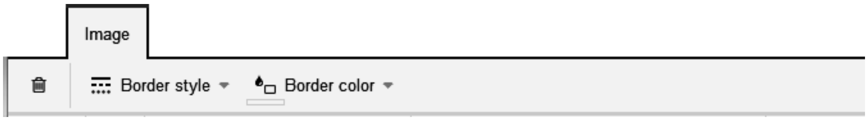


Image
Border style
Border color

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

- delete image
- set border style, set border colour

Chart tool bar

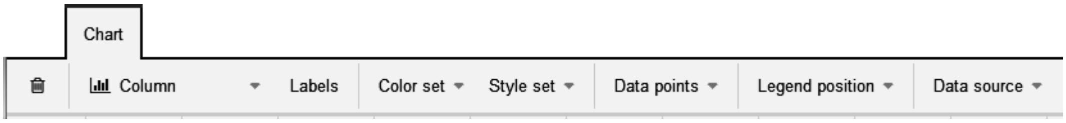


Chart
Column
Labels
Color set
Style set
Data points
Legend position
Data source

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, proceed as follows:

- create a spreadsheet in the *Spreadsheet* app
- create a spreadsheet in the *Drive* app

You can also use a template.

How to create a new spreadsheet in the *Spreadsheet* app:

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, use one of the following methods:

   - Click on a template in *New from Template*.
   - Open a template's context menu. Select **New from Template**.

   Information on templates can be found in *Templates* (page 33).

   The spreadsheet is shown on the *unnamed* page.

2. Click on **unnamed** in the **File** tool bar. Enter a name.

   Now you can create and edit [29] the content.

3. To finish, click the **Close document** icon ☒ on the right side of the office menu bar.

How to create a new spreadsheet in the *Drive* app:

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. To create a new spreadsheet without using a template, click the **New** icon in the tool bar. Click on **New spreadsheet**.

   To use a template, use one of the following methods:

   - Double-click on the template.
   - Select a template. Click on **New from template** in the tool bar.
   - Open the template in the *Viewer*. Click on **New from template**.

4. Click on **unnamed** in the **File** tool bar. Enter a name.

   Now you can create and edit [29] the content.

5. To finish, click the **Close document** icon ☒ on the right side of the office menu bar.

4.4 Opening Spreadsheets

You can open spreadsheets that are saved in Drive or on a local drive. The following options are available:

- open a spreadsheet in the *Spreadsheet* app
- open a spreadsheet in the *Drive* app
- open a locally saved spreadsheet

How to open a spreadsheet in the *Spreadsheet* app:

Use one of the following methods:

- To open a frequently used document, click on a document in *Recent documents*.

  You can also open a document's context menu. Select **Edit**.

  Tip: You can use the context menu to remove documents from the list of recently opened documents.
- In order to open another document, click on **Open document** in the toolbar. Select a spreadsheet in the *Open document* window. Click on **Open**.

How to open a spreadsheet in the *Drive* app:

Use one of the following methods:

- Select a spreadsheet. Click on **Edit** in the tool bar.
- Double-click on a spreadsheet.
- Open the spreadsheet in the *Viewer*. Click on **Edit**.

How to open a locally saved spreadsheet:

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

   In the *Open document* window, select a folder for which you have the appropriate permissions to create objects.
2. Click on **Upload local file**. Select a spreadsheet. Click on **OK**.

Result: The document is uploaded to *Drive*. Then, the document will be opened.

4.5 Editing Spreadsheets

When editing spreadsheets, you can do the following:

- edit tables, format cells, sort or filter data
- insert elements, e.g. formulas, images, charts
- add rows and columns, add or delete tables
- downloading or printing the selected spreadsheet or sending it in an E-Mail
- searching and replacing text

How to edit a spreadsheet:

Note: In order to edit a document, you need to have editing permissions for the *Drive* folder containing the document.

1. Create a new spreadsheet [27] or open [28] an existing spreadsheet.
2. To edit the document, use common techniques from familiar Office applications.

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

   In order to sort or filter selected cells or to create named ranges, use the functions of the *Data* tool bar.

   To insert various elements, use the *Insert* tool bar. Those elements can be inserted:

   - sum functions or other functions
   - hyperlink, image, chart

   In order to insert, delete or format whole rows or columns, use the functions in the *Rows/Columns* tool bar.

   Tip: Many funcitons can also be activated in the context menu.

   Note: All changes are immediately saved.
3. In order to add or delete a table or to change the tables' order, use the table tabs below the table.
4. To rename, save, download or print the selected spreadsheet or to send it in an E-Mail, use the functions in the *File* tool bar.
5. 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.
6. To finish editing and to close the spreadsheet, click the **Close document** icon✖ on the right side of the office document bar.

4.6 Editing Spreadsheets Under a New Name

You can create a new document as copy of an existing document. The following options are available:

- Edit a recently used document under a new name
- Edit any document under a new name

How to edit a recently used document under a new name:

1. In the *Spreadsheet* app you can open a document's context menu under *Recent Documents* Select **Edit as new**. The document will be opened for editing.
2. Click on **unnamed** in the **File** tool bar. Enter a name.

   Now you can create and edit [29] the content.

How to edit a document under a new name:

1. Launch the *Drive* 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. Open the document in the *Viewer*. Click the **More** icon≡▾. Select **Edit as new**. The document will be opened for editing.
4. Click on **unnamed** in the **File** tool bar. Enter a name.

   Now you can create and edit [29] the content.

4.7 The Spreadsheet Settings

Information on settings can be found in The Text Settings (page 20).

5 Templates

Learn how to work with templates.

- When creating a new document, you can use an existing template [34].
- You can create a new template [35] from the document that you are currently editing.
- You can edit [36] existing templates.
- You can organise [37] templates in folders.

5.1 Using Templates

Depending on the server configuration, different global templates are available for text documents or spreadsheets. You can also create your own templates [35].

How to use a template when creating a new document:

In the *Text* or the *Spreadsheet* app, use one of the following methods:

- Click on a template in *New from Template*.
- Open a template's context menu. Select **New from Template**.

In the *Drive* app, use one of the following methods:

- Double-click on the template.
- Select a template. Click on **New from template** in the tool bar.
- Open the template in the *Viewer*. Click on **New from template**.

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 *Drive* app. You can organise [37] 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. In the **File** tool bar, click on **Save in Drive**. Select **Save as template**. The *Save as template (dotx)* dialogue window opens.

   Select a template folder.

   Enter a file name. Click on **OK**.

3. Edit the content according to your wishes.

4. In order to finish editing the template, click the **Close document** icon✖

Similar actions

How to create a new template folder: (p. 37)

5.3 Editing Templates

You can edit own templates. You can organise [37] your own templates in template folders.

How to edit an existing template:

1. Open a template's context menu under *New from Template* in the *Text* or the *Spreadsheet* app. Select **Edit template**.

   In the *Drive* app, use one of the following methods:

   - Select a template. Click the **Actions** icon≡ in the tool bar. Click on **Edit template** in the menu.
   - Open the template in the *Viewer*. Click the **Actions** icon≡ in the tool bar. Click on **Edit template** in the menu.

2. Edit the content according to your wishes.
3. In order to finish editing the template, click the **Close document** icon✖

Similar actions

How to create a new template folder: (p. 37)

5.4 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
- open the folder containing the template.

How to create a new template folder:

1. In the *Drive* 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. In the display area, click on **Add new template folder**. 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 *Drive* app, click on the path below its name.

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

How to open a template folder:

Open a template's context menu under *New from Template* in the *Text* or the *Spreadsheet* app. Select **Show in Drive**.

The folder containing the template is displayed in the *Drive* app.

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 Groupware user guide, under the topic *Files and Teams*.
- You can edit a document together [40] with other users or external partners.

6.1 Editing Documents together

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

- The person who creates the document or opens it first, has editing permissions for the documen for the momentt. This person is called the current editor. Each person who later opens the document gets read permissions. They are called the viewers.
- The viewers can see all changes applied by the current editor.
- A viewer can become the current editor by requesting editing permissions. As soon as the previous editor completes the changes, the server transfers the editing permissions to the new current 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 Groupware user guide, under the topic *Permissions*.

2. Inform other persons that you now want to edit the document together. The respective persons 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 other users.

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

   Tip: In order to display a list of persons who opened the document, click on the Office menu item **View** and enable the **Show collaborators** checkbox. The current editor is displayed on top of the list.

3. The person who wants to edit the document has to click on **Edit** in the too lbar.

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, 21
App Text, 9
Apps
  Spreadsheet, 21
  Text, 9

C

Collaboration, 39
Create
  spreadsheets, 27
  text document, 16

D

Documentation, 5
Documents, 7
  settings, 20
Documents settings
  Global template folders, 20
  measurements, 20
  My template folders, 20
  User dictionary, 20

E

Edit
  edit documents together, 40
  spreadsheets, 29
  text documents, 18
edit under a new name
  spreadsheets, 30
  text documents, 19

O

Open
  spreadsheets, 28
  text documents, 17

S

Settings, 20
Spreadsheet, 21
  Components, 22
  edit page, 23
Spreadsheets
  create, 27
  download, 29
  edit, 29
  edit under a new name, 30
  Open, 28
  print, 29
  search and replace, 29

T

Templates, 33
  create, 35
  edit, 36
  organise, 37
  use, 34
Text, 9
  Components, 10
  edit page, 11
Text document
  create, 16
text documents
  download, 18
  edit, 18
  edit under a new name, 19
  Open, 17
  print, 18
  search and replace, 18