Documents

User Guide

Documents: User Guide

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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 documents in typical Office applications.

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 *Presentation* you will find instructions for using the Presentation 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. You can edit Office documents in native Microsoft or OpenOffice formats.

- Use formatted text documents for your correspondence. Use tables and images within the documents.
- Use spreadsheets in order to work with figures, spreadsheets and formulas.
- Create and edit presentations. Start the presentation locally or online.
- 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* [25] app for creating and editing spreadsheets.
- The *Presentation* [39] app for creating and editing presentations.

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

3.1.1 Tool bar

Contains the following functions:

- **New text document** button. Creates a **new text document** [19].
- **New text document (encrypted)** button. Whether it is displayed depends on the groupware configuration. Information on encryption can be found in the *Guard* user guide.
- **Open document** button. Opens an **existing document** [20].

3.1.2 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.

Also see

The *Text* Edit Page (p. 11)
Opening Text Documents (p. 20)
Editing Text Documents (p. 21)

3.1.3 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.

Also see

The *Text* Edit Page (p. 11)
Creating Text Documents (p. 19)
Editing Text Documents (p. 21)

3.2 The *Text* Edit Page

When creating a text document or editing an existing text document, the *Text* Edit page opens. It contains the following elements:

- Office menu bar
- *File* tool bar
- *Format* tool bar
- *Insert* tool bar
- *Table* tool bar. Is displayed when having selected a table.
- *Image* tool bar. Is displayed when having selected an image.
- *Shape* tool bar. Is displayed when having selected a text frame.
- *Review* tool bar
- Document window

Note: When having 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.

3.2.1 Office menu bar

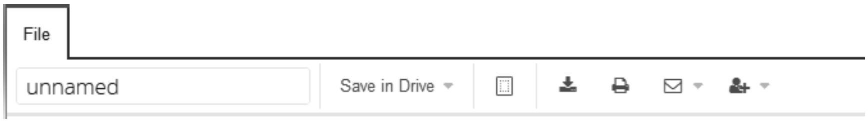
The Office menu bar includes the following elements:

- **File** tab. Shows the *File* tool bar that allows applying file functions.
- **Format** tab. Shows the *Format* too lbar 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.
- **Review** tab. Shows the *Review* tool bar that allows to using spell checking tools and tools for tracking changes.
- **Encryption** icon🔒 . Is displayed when having opened an encrypted document. Information on encryption can be found in the *Guard* user guide.
- Notifications about saving processes. Notify whether all changes in the document have been saved.
- **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 [66].
- **Close document** icon✖ . Closes the Format window.

Also see

Editing Text Documents (p. 21)

3.2.2 *File* tool bar



unnamed

Note: When having opened an encrypted document, functions for saving, downloading, sending and sharing the document are available.

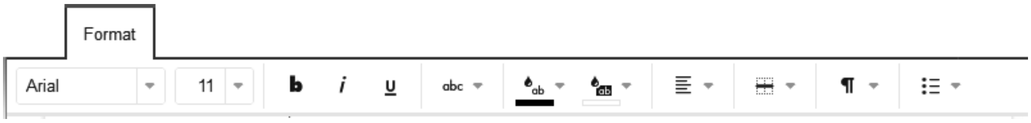
Contains the following tools:

- **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.
  - Depending on the configuration, a function for saving a document in an encrypted format will be available. Information on encryption can be found in the *Guard* user guide.
  - **Save as template**. Saves the selected document as a template.
  - **Export as PDF**. Exports the selected document in PDF format.
  - **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 . Opens a menu with the following entries:
  - **Attach document to e-mail**. Sends the selected document as an E-Mail attachment.
  - **Attach as PDF to e-mail**. Sends the selected document as an E-Mail attachment in PDF format.
  - **Send content as e-mail**. Sends the formatted content of the current document as E-Mail in HTML format.
- **Share** icon . Opens a menu with the following entries:
  - **Invite people**. Displays functions for inviting other users to read or edit the document.
  - **Create sharing link**. Displays functions for sharing the document with the help of a link.

Also see

Editing Text Documents (p. 21)

3.2.3 *Format* tool bar



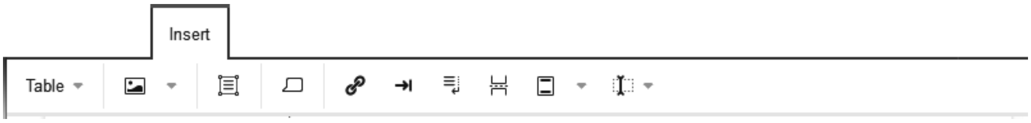
Contains the following tools:

- Character formatting tools.
    - font family, font size
    - emphasis
    - more font styles, clear formatting
    - text colour, text highlight colour
- Paragraph formatting tools.
    - paragraph alignment, line spacing, paragraph spacing
    - paragraph fill colour, paragraph borders
    - paragraph style, create new style
    - bullet list, numbered list, demote one level, promote one level

Also see

Editing Text Documents (p. 21)

3.2.4 *Insert* tool bar



The following elements are available.

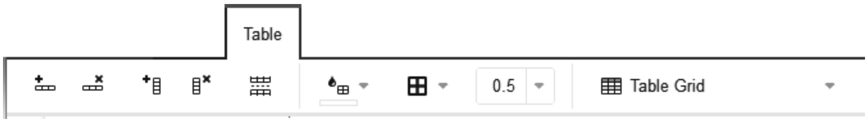
- **Insert table** button.
- **Insert image** button.
- **Insert text frame** button.
- **Insert comment** button. A comment field is displayed at the document's margin. In addition to the comment text, it contains the following:
    - the editor's name
    - the comment's creation date and time
   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

  Functions for hiding and showing comments can be found in *Review* tool bar (page 18).
- **Insert or edit hyperlink** button
- **Insert tab stop**, **Insert line break**, **Insert page break** buttons
- **Insert header & footer in document** 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.
- **Insert field** button. Opens a menu with functions for inserting fields:
    - author name, file name
    - time, date
    - page number, number of pages
- **Insert table of contents** button. Opens a menu with functions for inserting a table of contents:
  To adjust an existing table of contents, use the context menu.

Also see

Editing Text Documents (p. 21)

3.2.5 *Table* tool bar



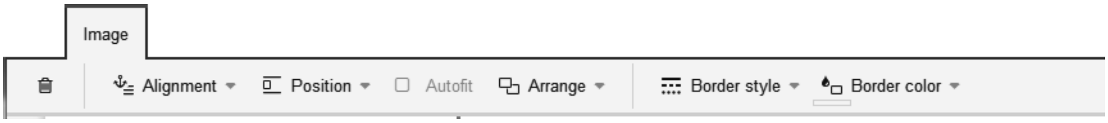
If the cursor is located within a table, the *Table* tool bar is displayed. It contains the following tools:

- 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 colours for specific table cells and rows.

Also see

Editing Text Documents (p. 21)

3.2.6 *Image* tool bar



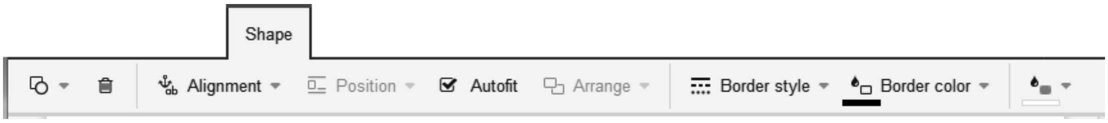
If an image has been selected, the *Image* tool bar will be displayed. It contains the following tools:

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

Also see

Editing Text Documents (p. 21)

3.2.7 *Shape* tool bar



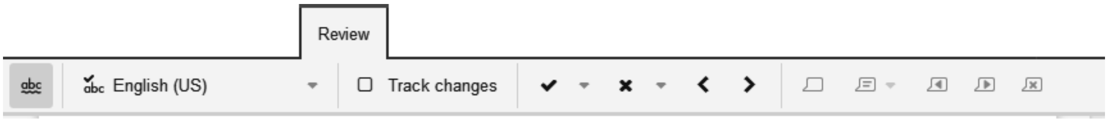
If a text frame or a shape has been selected, the *Shape* tool bar will be displayed. It contains the following tools:

- delete object
- Adjust position. Defines whether the object is anchored inline, to a paragraph or to the page.
- Adjust the position. If the object is anchored to a paragraph or a page, you can define the text wrapping.
- AutoAdjust. Defines whether the object's height is automatically adjusted to the content.
- Arrange. Defines the order of objects that overlap each other.
- adjust the border style and colour for the object frame
- adjust the background colour for the object's content

Also see

Editing Text Documents (p. 21)

3.2.8 *Review* tool bar



The following elements are available.

- **Check spelling permanently** icon. Activates the spell check while entering text.
  You can use the context menu to add words that are marked as unknown to the user dictionary. Functions for editing the dictionary can be found in The Documents Settings (page 23)
- Selection of the document's language or of the selected paragraph.
- **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
- **Insert 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 15).
- **Highlight comments mode** button. Opens a menu that allows defining 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
- **Show previous comment** and **Show next comment** buttons. Select the previous or next comment.
- **Delete all comments** button. Deletes all comments in the document.

Also see

Editing Text Documents (p. 21)

3.2.9 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 57).

   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 [21] 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 [21] the content.

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

Also see

Tool bar (p. 10)
New from template (p. 10)

3.4 Opening Text Documents

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

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

Information on opening encrypted documents can be found in the *Guard* user guide.

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.

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

Also see

Tool bar (p. 10)
Recent documents (p. 10)
New from template (p. 10)

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 or open 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. Those 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
     In order to edit a field's content, click into the field. Depending on the field, different editing possibilities are available.

   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.

Also see

The *Text* Edit Page (p. 11)

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 [21] 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 [21] the content.

Also see

Tool bar (p. 10)
Recent documents (p. 10)
The *Text* Edit Page (p. 11)

3.7 The Documents 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

If clicking on **Edit user dictionary**, the *User dictionary* window opens. You can add words to the dictionary or remove words from it.

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 57).

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, organize 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

4.1.1 Tool bar

Contains the following functions:

- **New spreadsheet** button. Creates a **new spreadsheet** [33].
- **New spreadsheet (encrypted)** button. Whether it is displayed depends on the groupware configuration. Information on encryption can be found in the *Guard* user guide.
- **Open document** button. Opens an **existing document** [34].

4.1.2 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.

Also see

The *Spreadsheet* Edit Page (p. 27)
Opening Spreadsheets (p. 34)
Editing Spreadsheets (p. 35)

4.1.3 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.

Also see

The *Spreadsheet* Edit Page (p. 27)
Creating Spreadsheets (p. 33)
Editing Spreadsheets (p. 35)

4.2 The *Spreadsheet* Edit Page

When creating a spreadsheet or editing an existing spreadsheet, the *Spreadsheet* Edit page opens. It contains the following elements:

- Office menu bar
- *File* tool bar
- *Format* tool bar
- *Data* tool bar
- *Insert* tool bar
- *Rows/Columns* tool bar
- *Image* tool bar. Is displayed when having selected an image.
- *Shape* tool bar. Is displayed when having selected a shape.
- *Chart* tool bar. Is displayed when having selected a chart.
- Document window
- Spreadsheet tabs

Note: When having 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.

4.2.1 Office menu bar

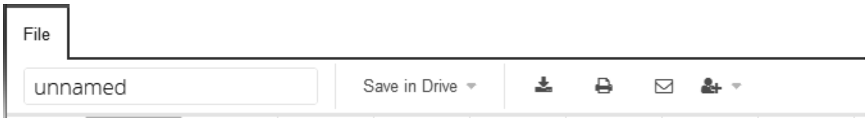
The Office menu bar includes the following buttons:

- **File** tab. Shows the *File* tool bar that allows applying file functions.
- **Format** tab. Shows the *Format* tool bar that allows to format the document's content.
- **Data** tab. Shows the *Data* tool bar that allows sorting or filtering 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.
- **Encryption** icon🔒 . Is displayed when having opened an encrypted document. Information on encryption can be found in the *Guard* user guide.
- Notifications about saving processes. Notify whether all changes in the document have been saved.
- **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 [66].
    - **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.

Also see

Editing Spreadsheets (p. 35)

4.2.2 *File* tool bar



Note: When having opened an encrypted document, functions for saving, downloading, sending and sharing the document are available.

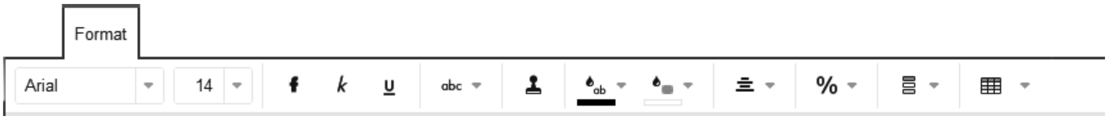
Contains the following tools:

- **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.
    - Depending on the configuration, a function for saving a document in an encrypted format will be available. Information on encryption can be found in the *Guard* user guide.
    - **Save as template**. Saves the selected document as a template.
    - **Export as PDF**. Exports the selected document in PDF format.
    - **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.
- **Share** icon . Opens a menu with the following entries:
    - **Invite people**. Displays functions for inviting other users to read or edit the document.
    - **Create sharing link**. Displays functions for sharing the document with the help of a link.

Also see

Editing Spreadsheets (p. 35)

4.2.3 *Format* tool bar



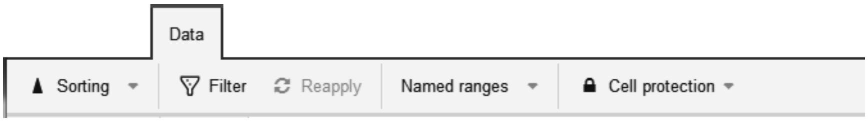
Contains the following:

- Character formatting tools.
  - font family, font size
  - emphasis
  - more font styles, clear formatting
  - format painter
  - text colour
- cell formatting tools
  - background colour
  - 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 border, border style, border colour
  - cell style

Also see

Editing Spreadsheets (p. 35)

4.2.4 *Data* tool bar



Contains the following tools:

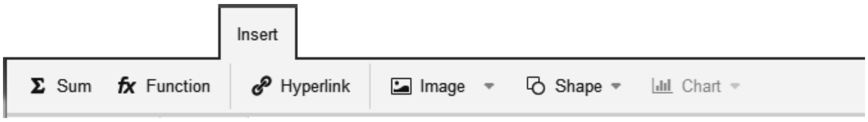
- sort the selected cells
- filter the selected cells
- Create, edit or display named ranges. Within formulas, named ranges can be used instead of the original cell addresses.
- Cell protection. Opens a menu that allows setting the following properties for the selected cells.
  - Protect cells from being edited.
  - Hide cells.

  Those properties become active when protecting cells. To do so, use the spreadsheet tab below the document window.

Also see

Editing Spreadsheets (p. 35)

4.2.5 *Insert* tool bar


Insert
Sum
Function
Hyperlink
Image
Shape
Chart

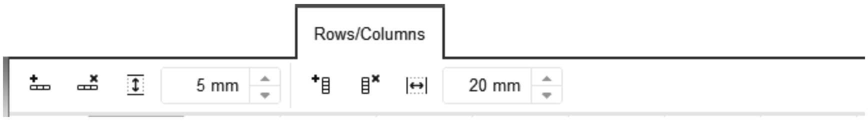
Contains the following tools:

- 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 shape
- insert a chart

Also see

Editing Spreadsheets (p. 35)

4.2.6 *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

Also see

Editing Spreadsheets (p. 35)

4.2.7 *Image* tool bar

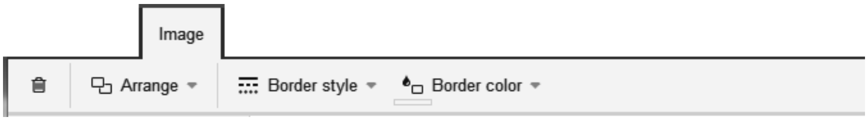


Image
Arrange
Border style
Border color

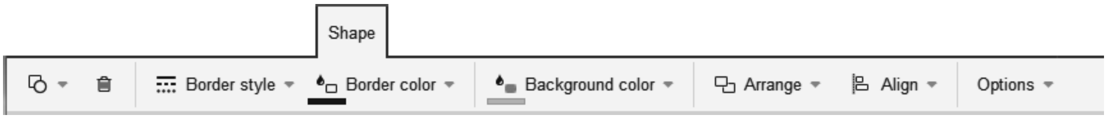
If an image has been selected, the *Image* tool bar will be displayed. It contains the following tools:

- Delete image
- set border style, set border colour

Also see

Editing Spreadsheets (p. 35)

4.2.8 *Shape* tool bar


Shape
Border style
Border color
Background color
Arrange
Align
Options

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

- delete object
- Arrange. Defines the order of objects that overlap each other.
- adjust the border style and colour for the object frame
- adjust the background colour for the object's content

Also see

Editing Spreadsheets (p. 35)

4.2.9 *Chart* tool bar

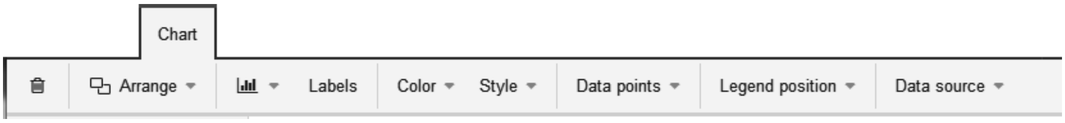


Chart
Arrange
Labels
Color
Style
Data points
Legend position
Data source

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

Also see

Editing Spreadsheets (p. 35)

4.2.10 Document window

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

4.2.11 Spreadsheet tabs

The spreadsheet tabs are located below the document window. It contains the following functions.

- Select the current spreadsheet.
- Create a new spreadsheet.
- Additional spreadsheet actions
    - rename, copy, delete spreadsheet
    - hide, show, protect spreadsheet
    - reorder sheets

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
- 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 57).

   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 [35] 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 [35] the content.

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

Also see

Tool bar (p. 26)
New from template (p. 26)

4.4 Opening Spreadsheets

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

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

Information on opening encrypted documents can be found in the *Guard* user guide.

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.

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

Also see

Tool bar (p. 26)
Recent documents (p. 26)
New from template (p. 26)

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 [33] or open [34] 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 functions 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 document bar.

Also see

The *Spreadsheet* Edit Page (p. 27)

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 [35] 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 [35] the content.

Also see

Tool bar (p. 26)
Recent documents (p. 26)
The *Spreadsheet* Edit Page (p. 27)

4.7 The Settings

Information on settings can be found in The Documents Settings (page 23).

5 Presentation

Learn how to work with the *Presentation* application.

- The *Presentation* Components
- The *Presentation* Edit Page Components
- create new presentations
- open existing presentations
- edit presentations
- edit a presentation under a new name

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

How to launch the *Presentation* app:

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

5.1 The *Presentation* Components

The *Presentation* app includes the following components.

- Tool bar
- Recent documents
- New from template

5.1.1 Tool bar

Contains the following functions:

- **New presentation** button. Creates a **new presentation** [50].
- **New presentation (encrypted)** button. Whether it is displayed depends on the groupware configuration. Information on encryption can be found in the *Guard* user guide.
- **Open document** button. Opens an **existing document** [51].

5.1.2 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.

Also see

The *Presentation* Edit Page (p. 41)
Opening Presentations (p. 51)
Editing Presentations (p. 52)

5.1.3 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.

Also see

The *Presentation* Edit Page (p. 41)
Creating Presentations (p. 50)
Editing Presentations (p. 52)

5.2 The *Presentation* Edit Page

When creating a new presentation or editing an existing presentation, the *Presentation* Edit page opens. It contains the following elements:

- Office menu bar
- *File* tool bar
- *Format* tool bar
- *Insert* tool bar
- *Slide* tool bar
- *Table* tool bar. Is displayed when having selected a table.
- *Image* tool bar. Is displayed when having selected an image.
- *Shape* tool bar. Is displayed when having selected a shape.
- *Review* tool bar
- Side bar
- Document window

Note: When having 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.

5.2.1 Office menu bar

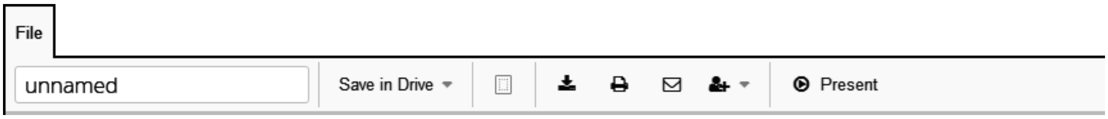
Contains the following:

- **File** tab. Shows the *File* tool bar that allows applying file functions.
- **Format** tab. Shows the *Format* tool bar that allows to format 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.
- **Slide** tab. Shows the *Slide* tool bar that allows adding, deleting or editing slides.
- **Review** tab. Shows the *Review* tool bar that allows using spell checking tools and tools for tracking changes.
- **Encryption** icon🔒 . Is displayed when having opened an encrypted document. Information on encryption can be found in the *Guard* user guide.
- Notifications about saving processes. Notify whether all changes in the document have been saved.
- **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.
- **Present** button. Clicking the icon opens the presentation in a new page. On this page, you can give the presentation.
  Information and instructions can be found in the Groupware user guide, under the topic *Drive> Holding a presentation*.
- **View** button. Opens a menu with the following entries:
  - Functions for zooming the text in or out.
  - **View master** check box. Defines whether to show the master slides instead of the slides. In this case you can edit the master slides.
  - **Show tool bars** check box. Defines whether the tool bars are always displayed.
  - **Show collaborators** check box. Defines whether the document editors list is displayed. This function is only activated if you edit the document together with other users [66].
- **Close document** icon✖ . Closes the Format window.

Also see

Editing Presentations (p. 52)

5.2.2 *File* tool bar



Note: When having opened an encrypted document, functions for saving, downloading, sending and sharing the document are available.

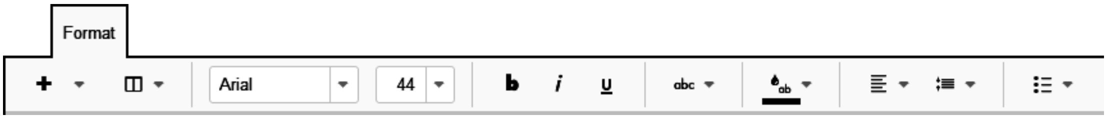
Contains the following tools:

- **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.
    - Depending on the configuration, a function for saving a document in an encrypted format will be available. Information on encryption can be found in the *Guard* user guide.
    - **Save as template**. Saves the selected document as template.
    - **Export as PDF**. Exports the selected document in PDF format.
    - **Auto Save** check box. Defines whether the document gets saved automatically in regular intervals.
- **Slide settings** icon . Opens the dialogue window *Slide settings*. It contains tools for setting the slide size.
    - Default values for the slide format and paper orientation
    - Input fields for the slide size
- **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.
- **Share** icon . Opens a menu with the following entries:
    - **Invite people**. Displays functions for inviting other users to read or edit the document.
    - **Create sharing link**. Displays functions for sharing the document with the help of a link.
- **Present** button. Clicking the icon opens the presentation in a new page. On this page, you can give the presentation.
  Information and instructions can be found in the Groupware user guide, under the topic *Drive> Holding a presentation*.

Also see

Editing Presentations (p. 52)

5.2.3 *Format* tool bar



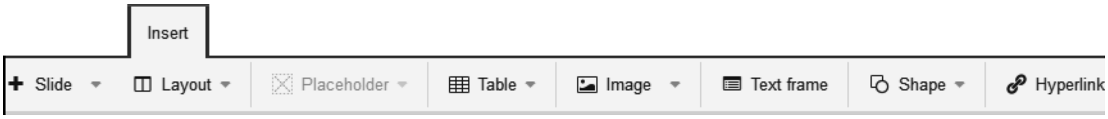
Contains the following:

- Tools for inserting a new slide.
  - The **+ Slide** button inserts a slide with the master slide's layout of the previous slide. The slide inserted directly after the title slide gets a standard layout.
  - The **Insert new slide** icon▼ opens a menu with available master slides.
- **Layout** button. Changes the slide's layout by assigning another master slide to the slide.
- Character formatting tools.
  - font family, font size
  - emphasis
  - more font styles, clear formatting
  - text colour, text highlight colour
- Paragraph formatting tools.
  - paragraph alignment, line spacing, paragraph spacing
  - paragraph fill colour, paragraph borders
  - paragraph style, create new style
  - bullet list, numbered list, demote one level, promote one level

Also see

Editing Presentations (p. 52)

5.2.4 *Insert* tool bar



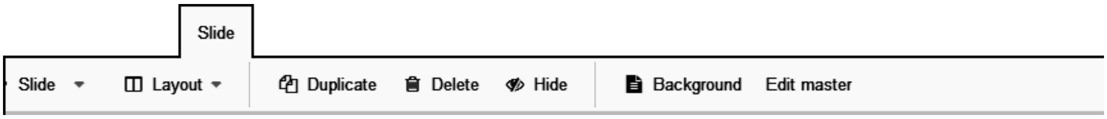
Contains the following:

- Tools for inserting a new slide.
  - The **+ Slide** button inserts a slide with the master slide's layout of the previous slide. The slide inserted directly after the title slide gets a standard layout.
  - The **Insert new slide** icon▼ opens a menu with available master slides.
- **Layout** button. Changes the slide's layout by assigning another master slide to the slide.
- **Table** button
- **Image** button
- **Text frame** button
- **Shape** button. Opens a menu with functions for inserting shapes: A shape consists of a frame and a background. Many shapes contain text that can be edited.
  Functions for editing a shape can be found in the **Fix the link:**
- **Insert or edit hyperlink** button
- **Footer** button. Opens a dialogue window that allows defining the footer contents.
  - time, date, footer text, slide number
  - buttons for inserting the footer into the current slide or into all slides
- **Field** button. Opens a menu with functions for inserting fields:
  - time, date
  - slide number

Also see

Editing Presentations (p. 52)

5.2.5 *Slide* tool bar



Contains the following:

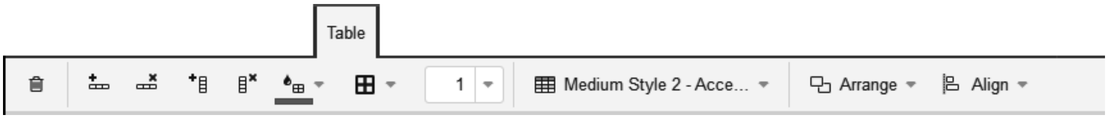
- Tools for inserting a new slide.
    - The **+ Slide** button inserts a slide with the master slide's layout of the previous slide.
      The slide inserted directly after the title slide gets a standard layout.
    - The **Insert new slide** icon▼ opens a menu with available master slides.
- **Layout** button. Changes the slide's layout by assigning another master slide to the slide.
- **Duplicate** button. Creates duplicates of the slides that you selected in the side bar.
- **Delete** button. Deletes the slides that you selected in the side bar.
- **Hide** button. Hides the current slide. Hidden slides are not displayed during a presentation.
- **Background** button. Opens the *Background* dialogue window. The dialogue window contains tools for setting the background colour or a background image for the current slide or for all slides.
    - Selecting the background colour or a background image
    - Setting the transparency
    - **Hide background images** check box. Defines whether the selected background is displayed.
    - Buttons for canceling, applying to current slide, applying to all slides
- **Edit master slide** button. Opens the current slide's master slide in the document window.
    - Each change applied in this window, changes the current slide's master slide.
    - Those changes are applied to each presentation slide that has been inserted using this master slide.
    - Slides with a layout adjusted by you are not affected by the master slide changes.

  In order to finish the editing, click on **Done**.

Also see

Editing Presentations (p. 52)

5.2.6 *Table* tool bar



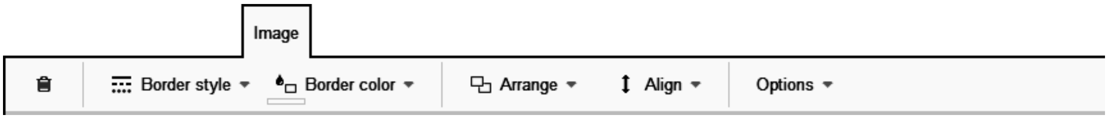
If the cursor is located within a table, the *Table* tool bar is displayed. It contains the following:

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

Also see

Editing Presentations (p. 52)

5.2.7 *Image* tool bar



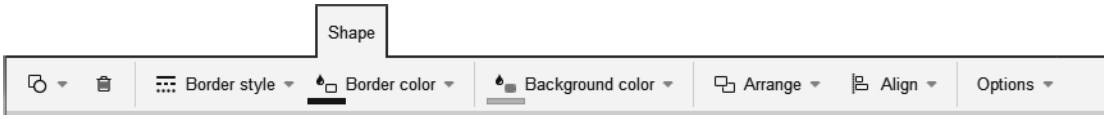
If an image has been selected, the *Image* tool bar will be displayed. It contains the following:

- Delete image
- Adjust the border style and colour for the image frame.
- **Arrange** button. Opens a menu that allows defining the image view.
  - Define the display order of images, text frames and shapes that overlap each other.
  - Buttons for inserting the footer into the current slide or into all slides.
- **Align** button. Opens a menu that allows defining the alignment of one or several objects on the slide.

Also see

Editing Presentations (p. 52)

5.2.8 *Shape* tool bar



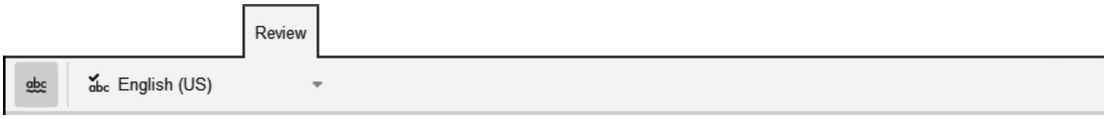
If a text frame or a shape has been selected, the *Shape* tool bar will be displayed. It contains the following tools:

- delete object
- adjust the border style and colour for the object frame
- adjust the background colour for the object's content
- Arrange. A menu with the following entries opens.
  - Define the display order of objects that overlap each other.
  - Rotate or flip objects
- Align. Opens a menu that allows defining the alignment of objects on the slide.
- If multiple objects are selected, the following functions are displayed.
  - Group. Creates a group from the selected objects. The group can be edited as a single object.
  - Ungroup. Removes a group. The objects are kept.
- Options. Opens a menu that allows defining the behavior of objects when being scaled.

Also see

Editing Presentations (p. 52)

5.2.9 *Review* tool bar



The following elements are available.

- **Check spelling permanently** icon. Activates the spell check while entering text.
  You can use the context menu to add words that are marked as unknown to the user dictionary Functions for editing the dictionary can be found in The Settings (page 56)
- Selection of the document's language or of the selected paragraph.

Also see

Editing Presentations (p. 52)

5.2.10 Side bar

The side bar is on the left. It contains a preview of the presentation slides. The following functions are available.

- If clicking on a slide, it is displayed in the document window.
- A slide's context menu contains the following functions: add new slide. duplicate, delete, hide, change layout.
- You can change the slide order by dragging a slide to another position.

Also see

Editing Presentations (p. 52)

5.2.11 Document window

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

5.3 Creating Presentations

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

- create a presentation in the *Presentation* app
- create a presentation in the *Drive* app

You can also use a template.

How to create a new presentation in the *Presentation* app:

1. To create a new presentation without using a template, click on **New presentation** in the tool bar in the *Presentation* 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 57).

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

   Now you can create and edit [52] the content.
3. To finish, click the **Close document** icon ☒ on the right side of the Office menu bar.

How to create a new presentation 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 presentation without using a template, click on **New** in the tool bar. Click on **New presentation**.

   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 [52] the content.
5. To finish, click the **Close document** icon ☒ on the right side of the Office menu bar.

Also see

Tool bar (p. 40)
New from template (p. 40)

5.4 Opening Presentations

You can open presentations that are saved in Drive or on a local drive. There are the following options:

- open a presentation in the *Presentation* app
- open a presentation in the *Drive* app
- open a locally saved presentation

Information on opening encrypted documents can be found in the *Guard* user guide.

How to open a presentation in the *Presentation* app:

Use one of the following methods:

- To open a frequently used presentation, 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 presentation, click on **Open document** in the tool bar. Select a presentation in the *Open document* window. Click on **Open**.

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

Use one of the following methods:

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

How to open a locally saved presentation:

1. In the *Presentation* 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 presentation.

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

Also see

Tool bar (p. 40)
Recent documents (p. 40)
New from template (p. 40)

5.5 Editing Presentations

When editing presentations, you can do the following:

- create a presentation
    - insert, duplicate, delete slides
    - hold, download, print the presentation or send it in an E-Mail
    - hold the presentation
- edit a slide's content
    - edit text, format characters, format paragraphs
    - insert various elements, e.g.: tables, images, text frames, headers and footers, page number
    - edit objects, e.g.: move, rotate, scale
    - spell check, search and replace text elements
- edit a slide's layout
    - assign master slide
    - adjust layout
    - edit master slide

How to create a presentation:

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

1. Create a new presentation [50] or open an existing presentation [51].
2. To set the page format for the slides, click the **Slide settings** icon🗋 in the tool bar.
3. To add a new slide, select one of the tool bars **Format**, **Insert**, **Slide**. Use the following methods:
   - To insert a slide with the master slide's layout of the previous slide, click on the **+ Slide** button. When using the **+ Slide** button to insert a slide after the title slide, the inserted slide gets the layout of the standard master slide.
     You can also open a slide's context menu in the side bar. Select **Insert slide**.
   - To insert a slide with another master slide's layout, click the **Insert new slide** icon▾ . Select a master slide.
   - To insert a copy of a slide, open a slide's context menu in the side bar. Select **Duplicate slide**.
4. Create and edit the content and layout of the slides.
5. The following options are available for organising the presentation slides.
   - To change the order of the slides, drag a slide to another position in the side bar.
   - To delete a slide, open the slide's context menu in the side bar. Select **Delete slide**.
   - If a slide is not to be displayed in the presentation, open the slide's context menu in the side bar. Select **Hide slide**.
6. 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.
7. To finish editing and to close the presentation, click the **Close document** icon☒ on the right side of the Office menu bar.

How to edit a slide's content:

1. Select the slide to be edited in the side bar.
2. Depending on the master slide used, the slide contains elements with placeholder text. To edit a text, click on it.

   To insert further elements, use the functions of the **Insert** tool bar.

   In order to edit an element, click on it. Use the functions of the **Shape** tool bar.
3. to format characters or paragraphs, use the functions in the *Format* tool bar.

   To insert various elements, use the *Insert* tool bar. Those elements can be inserted:
   - table, image, text frame, shape, hyperlink
   - a footer with the fields date, time, text, slide number
   - fields with automatically created contents
4. To check the spelling, use the functions in the *Review* tool bar.

   Note: All changes are immediately saved.

   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.

How to edit a slide's layout:

1. Select the slide to be edited in the side bar.
2. To assign another master slide's layout to the slide, open the slide's context menu in the side bar. Select **Change layout**. Select a master slide.
3. To adjust the layout of this slide, edit the elements by clicking on one of the elements. A frame with edit points is displayed.
   - To change the position, drag the frame to the new position.
   - To change the size or the rotation, drag a suitable edit point.
4. To adjust the background, select the **Slide** tool bar. Click on **Background**. Change the settings in the *Background* dialogue window.
5. To adjust the layout of all slides using the same master slide, you can edit the master slide. To do so, proceed as follows:

   Select the **Slide** tool bar. Click on **Edit master slide**. You can also click on **View** in the Office menu bar. Enable **View master**.

   Edit the master slide. To see which slides are using this master slide, hover over the master slide in the side bar.

   Click on **Finish**. You can also click on **View** in the Office menu bar. Disable **View master**.

   Note: Slides which layout you changed before will keep their current layout.

Also see

The *Presentation* Edit Page (p. 41)

5.6 Editing Presentations 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 *Presentation* 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 [52] 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 [52] the content.

Also see

Tool bar (p. 40)
Recent documents (p. 40)
The *Presentation* Edit Page (p. 41)

5.7 The Settings

Information on settings can be found in The Documents Settings (page 23).

6 Templates

Learn how to work with templates.

- When creating a new document, you can use an existing template [58].
- You can create a new template [59] from the document that you are currently editing.
- You can edit [60] existing templates.
- You can organise [61] templates in folders.

6.1 Using Templates

Depending on the server configuration, different global templates are available. You can also create your own templates [59].

How to use a template when creating a new document:

In the *Text*, *Spreadsheet* or the *Presentation* 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.

6.2 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 [61] 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*, *Spreadsheet* or *Presentation* 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✖

6.3 Editing Templates

You can edit own templates. You can organise [61] 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*, *Spreadsheet* or the *Presentation* 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☒

6.4 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.

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*, *Spreadsheet* or the *Presentation* app. Select **Show in Drive**.

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

7 Collaboration

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

- Share [64] documents for other users or external partners with read or edit access.
- You can edit a document together [66] with other users or external partners in real time.

7.1 Sharing Documents

The following options are available:

- You can share a selected document 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 read the document.
- Invite internal users or external partners by E-Mail to a share. You define which permissions are granted for the document.
  The invitation E-Mail contains notes for accessing the document. If an external partner accesses the document, the partner will automatically be logged in as a guest user.

How to share the selected document with read access by using a public link:

Prerequisite: You have opened a document for editing purposes.

1. Click on **File** in the Office menu bar .

   Click the **Share** icon in the tool bar. Click on **Create sharing link**.

   The window for sharing objects will be opened. It contains a public link for a read access to the share.

   To insert the link into other applications, click the **Copy to clipboard** icon next to the link.

2. The following options are available:
   - In order to directly send the link by E-Mail, enter the respective E-Mail addresses. You can enter a message for the recipients.
   - By default, the data is shared with read access for an unlimited time. To set a time limit for access to the shared data, enable **Expires in**. Select a time range.
   - To protect access with a password, enable **Password required**. Enter a password. If you send the public link by E-Mail, the E-Mail contains the password.

3. Click on **Close**.

Similar actions

How to invite internal users or external partners to read or edit the selected document: (p. 65)

How to invite internal users or external partners to read or edit the selected document:

Prerequisite: You have opened a document for editing purposes.

1. Click on **File** in the Office menu bar .

   Click the **Share** icon in the tool bar. Click on **Invite people**.

   A window opens. Existing permissions will be shown as a list.

2. 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.

3. The following options are available:
   - To adjust a user role, click on the current user role **Viewer**. Select an entry from the menu.
   - In order to remove a permission, click the **Action** icon≡ next to the name. Click on **Remove**.

4. Click on **Share**.

   The recipient gets an E-Mail with a link. If the recipient clicks on the link, the document will be opened in the Viewer. If you granted edit permissions to a recipient, the recipient can open the document for editing purposes by clicking on **Edit** in the Viewer.

Similar actions

How to share the selected document with read access by using a public link: (p. 65)

7.2 Editing Documents together

Documents saved on the groupware server can be edited together with other users or with external partners in real time. 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 together have the required permissions for editing the document. Information and instructions can be found in the Groupware user guide, under the topic *Organising Data > 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.

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