Documents

User Guide

Documents: User Guide

Publication date Thursday, 23. October 2014 Version 1.6
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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 13
3.4 Editing Text Documents 14
3.5 Editing Text Documents Under a New Name 15

4 Spreadsheet 17

4.1 The *Spreadsheet*Components 18
4.2 The *Spreadsheet* Edit Page Components 19
4.3 Creating Spreadsheets 21
4.4 Editing Spreadsheets 22
4.5 Editing Spreadsheets Under a New Name 23

Index 25

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?
- Further Help

Who is the Target Group for this Documentation?

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

Which Contents are Included in the Documentation?

This documentation includes the following information:

- In *What is Documents for?* you will find a short description of Documents.
- In *Text* you will find instructions for using the Text app.
- In *Spreadsheet* you will find instructions for using the Spreadsheet app.

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.

Further Help

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

2 What is Documents for?

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

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

In *Documents*, the following apps are available:

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

3 Text

Learn how to work with the *Text* application.

- The *Text* components
- The *Text* Edit page components
- create text documents
- edit text documents
- edit a document under a new name [15]

In order to search for text files, organize 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

Toolbar

Contains the following functions:

- **New text document** button. Creates a **new text document** [13].
- **Open text document** button. Opens an **existing document** [14].

Recent documents

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

New from template

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

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

3.2 The *Text* Edit Page Components

Office menu bar

The Office menu bar includes the following buttons:

- **File** button. Shows the *File* toolbar that allows to apply file functions.
- **Format** button. Shows the *Format* toolbar that allows to format the document's content.
- **Insert** button. Shows the *Insert* toolbar that allows to insert objects like images, tables or hyperlinks in the text.
- **Review** button. Shows the *Review* toolbar that allows to use spell checking tools.
- **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 toolbars** checkbox. Defines whether the toolbars are always displayed.
- **Close document** icon ✖ . Closes the Format window.

File toolbar

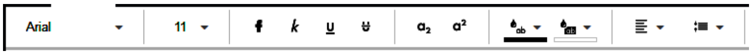
Contains the following tools:

- **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
    - Save as template
    - **AutoSave** checkbox. Defines whether the document gets saved automatically in regular intervals.
- **Download** icon☁ . Downloads the selected document.
- **Print** icon🖶 . Displays the current document in a print dialog. Use the control elements in the upper part of the dialog to print the document or to save it as a PDF file.
- **Send as mail** icon✉ . Sends the selected document as an E-Mail attachment.

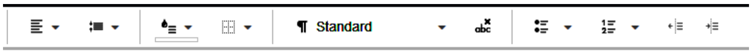
Format toolbar

Contains the following tools:

- formatting tools



    - font family, font size
    - emphasis
    - metrics
    - text color, text highlight color
- paragraph formatting tools



    - paragraph alignment, line spacing
    - paragraph fill color, paragraph borders
    - paragraph style, clear formatting
    - bullet list, numbered list, demote one level, promote one level

Insert toolbar

Contains the following tools:

- insert table
    - If the cursor is located within a table, the *Table* toolbar is displayed.
- Insert or edit hyperlink
- insert image
    - If a file has been selected, the *Drawing* toolbar will be displayed.
- insert tab stop, insert line break

Review toolbar

Contains the following tools:

- selection of the document's language
- enabling the spellchecker

Document window

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

3.3 Creating Text Documents

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

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

How to create a new text document:

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

   To use a template, click on a template in *New from Template*.

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

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

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

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

3.4 Editing Text Documents

When editing text documents, you can do the following:

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

You can edit a text document either in the *Text* app or in the *Drive* app.

How to edit a text document:

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

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

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

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

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

How to edit a document in the *Drive* app:

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

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

   Use the techniques described in the instruction for editing documents.

3.5 Editing Text Documents Under a New Name

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

How to edit a document under a new name:

1. Launch the *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. Click on a document in the display area. In the pop-up, click on **More**. Select **Edit as new**. The document will be opened for editing.
4. Click on **Unnamed** on the upper right side of the document bar. Enter a name for the document.
5. You can now use the functions for editing a text document.

4 Spreadsheet

Learn how to work with the *Spreadsheet* application.

- The *Spreadsheet* components
- create spreadsheets
- edit spreadsheets
- edit a spreadsheet under a new name [23]

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

Toolbar

Contains the following functions:

- **New spreadsheet** button. Creates a **new text document** [21].
- **Open spreadsheet** button. Opens an **existing document** [22].

Recent documents

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

New from template

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

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

4.2 The *Spreadsheet* Edit Page Components

Office menu bar

The Office menu bar includes the following buttons:

- **File** button. Shows the *File* toolbar that allows to apply file functions.
- **Format** button. Shows the *Format* toolbar that allows to format the document's content.
- **Insert** button. Shows the *Insert* toolbar that allows to insert objects like images, tables or hyperlinks in the text.
- **Rows/Colums** button. Shows the *Review* toolbar that allows to use 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 sheet** button. Splits the sheet above and left of the current cursor position.
  - **Freeze sheet** button. Freezes the rows above and the columns left of the cursor.
  - **Show toolbars** checkbox. Defines whether the toolbars are always displayed.
  - **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 toolbar

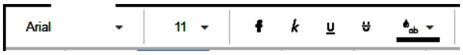
Contains the following tools:

- **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
  - Save as template
  - **AutoSave** checkbox. Defines whether the document gets saved automatically in regular intervals.
- **Download** icon . Downloads the selected document.
- **Print** icon . Displays the current document in a print dialog. Use the control elements in the upper part of the dialog to print the document or to save it as a PDF file.
- **Send as mail** icon . Sends the selected document as an E-Mail attachment.

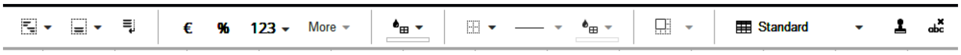
Format toolbar

Contains the following:

- character formatting tools



  - font family, font size
  - emphasis
  - text color
- cell formatting tools



  - horizontal alignment, vertical alignment, automatic word wrap
  - Number format. Defines the cell content's format, e.g. number.
  - Format codes. Defines the subformat, e.g. the number of decimal places.
  - cell fill color
  - cell borders, border style, border color
  - Merge or unmerge cells.
  - cell style, copy formatting, delete formatting

Insert toolbar

Contains the following tools:

- calculate the sum of the selected cells
- insert or edit hyperlink
- insert image
  If a file has been selected, the *Drawing* toolbar will be displayed.
- insert a chart
  If a chart is selected, the *Chart* toolbar is displayed that allows to edit the chart.

Rows/Columns toolbar

Contains the following tools:

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

Document window

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

4.3 Creating Spreadsheets

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

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

How to create a new spreadsheet:

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

   To use a template, click on a template in *New from Template*.

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

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

How to create a new 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. Click the **New** icon in the toolbar. Click on **New spreadsheet**.
4. Click on **Unnamed** on the upper right side of the document bar. Enter a name for the document.
5. Create and edit the document's content. To edit the document, use the common techniques from the familiar Office applications.

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

4.4 Editing Spreadsheets

When editing spreadsheets, you can do the following:

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

You can edit a text document either in the *Spreadsheet* app or in the *Drive* app.

How to edit a spreadsheet:

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

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

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

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

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

How to edit a document in the *Drive* app:

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

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

   Use the techniques described in the instruction for editing documents.

4.5 Editing Spreadsheets Under a New Name

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

How to edit a document under a new name:

1. Launch the *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. Click on a document in the display area. In the pop-up, click on **More**. Select **Edit as new**. The document will be opened for editing.
4. Click on **Unnamed** on the upper right side of the document bar. Enter a name for the document.
5. You can now use the functions for editing a spreadsheet.

Index

A

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

C

Create
  spreadsheets, 21
  text document, 13

D

Documentation, 5
Documents, 7

E

Edit
  spreadsheets, 22
  text documents, 14
edit under a new name
  spreadsheets, 23
  text documents, 15

S

Spreadsheet, 17
  Components, 18
  edit page, 19
Spreadsheets
  create, 21
  download, 22
  edit, 22
  edit under a new name, 23
  print, 22
  search and replace, 22

T

Text, 9
  Components, 10
  edit page, 11
Text document
  create, 13
text documents
  download, 14
  edit, 14
  edit under a new name, 15
  print, 14
  search and replace, 14