Documents

User Guide

Documents: User Guide

Publication date Wednesday, 23. March 2016 Version 7.8.0
Copyright © 2016-2016 OX Software GmbH. , This document is the intellectual property of OX Software GmbH.

The document may be copied in whole or in part, provided that each copy contains this copyright notice. The information contained in this book was compiled with the utmost care. Nevertheless, erroneous statements cannot be excluded altogether. OX Software GmbH, the authors and the translators are not liable for possible errors and their consequences. The names of software and hardware used in this book may be registered trademarks; they are used without warranty of free usability. OX Software GmbH generally follows the spelling conventions of the manufacturers. The reproduction of brand names, trade names, logos, etc. in this book (even without special markings) does not justify the assumption that such names can be considered free (for the purposes of trademark and brand name regulations).

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

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

5 Templates **31**

5.1 Using Templates 32

5.2 Creating Templates 33

5.3 Organizing Templates 34

6 Collaboration **35**

6.1 Editing Documents together 36

Index **37**

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.
- 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.

Further Help

A 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 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* [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, 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

The *Text* app includes the following components.

- Toolbar
- Recent documents
- New from template

Toolbar

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. 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

The *Text* Edit page contains the following components.

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

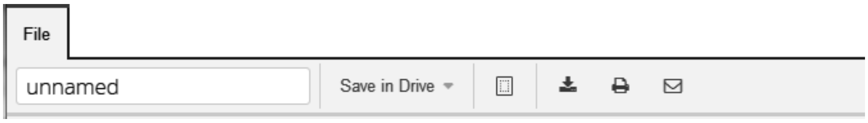
Note: When having a small screen width, a compact toolbar is displayed. In the compact toolbar, some text is replaced with icons. Multiple menu items are combined in scrollbars.

Office menu bar

The Office menu bar includes the following elements:

- **File** tab. Shows the *File* toolbar that allows to apply file functions.
- **Format** tab. Shows the *Format* toolbar that allows to format the document's content.
- **Insert** tab. Shows the *Insert* toolbar that allows to insert 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* toolbar that allows to use 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 toolbars** checkbox. Defines whether the toolbars 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 [36].
- **Close document** icon . Closes the Format window.

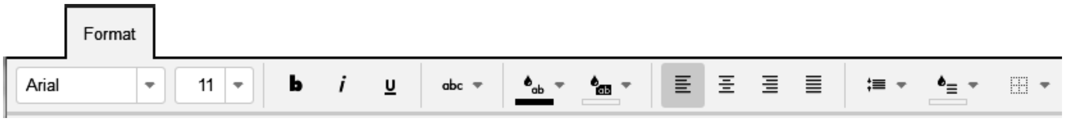
File toolbar



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**. Saves the selected document under a different name or in another folder.
  - **Save as template**. Saves the selected document as template.
  - **AutoSave** checkbox. Defines whether the document gets saved automatically in regular intervals.
- **Page settings** icon . Opens the *Page settings* dialog window. The dialog 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 mail** icon . Sends the selected document as an E-Mail attachment.

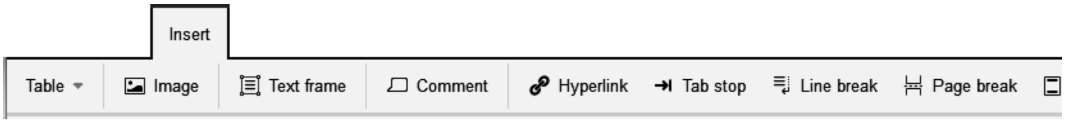
Format toolbar



Contains the following tools:

- character 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



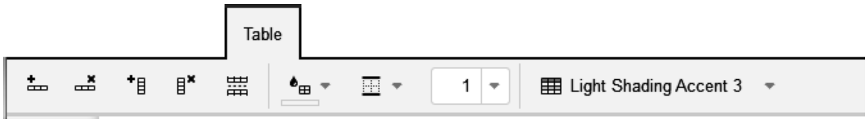
The following elements are available.

- **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* toolbar (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. Further 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.

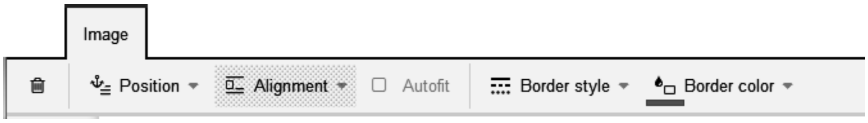
Table toolbar



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

- insert row, delete selected rows, insert column, delete selected columns
- split table
- select cell fill color, 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.

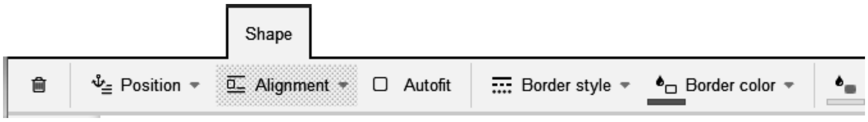
Image toolbar



If an image has been selected, the *Image* toolbar 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.
- Adjust the border style and color for the image frame.

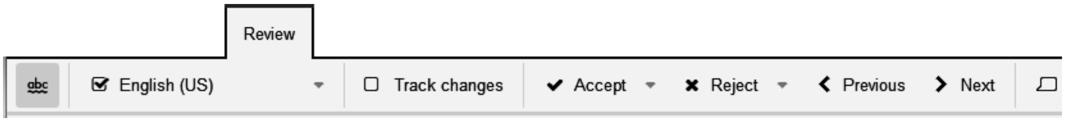
Shape toolbar



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

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

Review toolbar



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. Further 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* toolbar (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:

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*. Information on templates can be found in *Templates* (page 31).

   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 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 toolbar. Click on **New text document**.

   In order to use a template, open the template in the *Viewer*. Click on **New from template**.
4. Click on **unnamed** in the **File** toolbar. 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 documents that are saved at the following locations:

- in *Drive*
- on a local drive

How to open a text document that is saved in *Drive*:

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

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

In order to open another document, click on **Open Text Document** in the toolbar. Select a text document in the *Open document* window. Click on **Open**.

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

Select a text document. Click on **Edit** in the toolbar.

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 text document** in the toolbar.

   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
- 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 the familiar Office applications.

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

   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* toolbar. Those elements can be inserted:
   - table, image, text frame, comment, hyperlink
   - tab stop, line break, page break
   - header, footer

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

   Tip: Many funcitons 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* 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.

3.6 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. 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** 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
- 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.

- Toolbar
- Recent documents
- New from template

Toolbar

Contains the following functions:

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

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

The *Text* Edit page contains the following components.

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

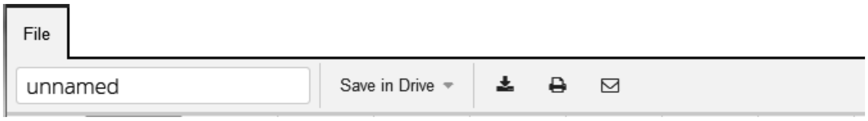
Note: When having a small screen width, a compact toolbar is displayed. In the compact toolbar, some text is replaced with icons. Multiple menu items are combined in scrollbars.

Office menu bar

The Office menu bar includes the following buttons:

- **File** tab. Shows the *File* toolbar that allows to apply file functions.
- **Format** tab. Shows the *Format* toolbar that allows to format the document's content.
- **Data** tab. Shows the *Data* toolbar that allows to sort or filter data.
- **Insert** tab. Shows the *Insert* toolbar that allows to insert objects like images, tables or hyperlinks in the text.
- **Rows/Columns** tab. Shows the *Rows/Columns* 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 table** 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 collaborators** checkbox. Defines whether the document editors list is displayed. This function is only activated if you edit the document together with other users [36].
    - **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.

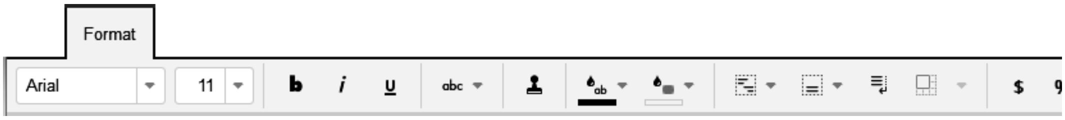
File toolbar



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**. Saves the selected document under a different name or in another folder.
    - **Save as template**. Saves the selected document as 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 mail** icon . Sends the selected document as an E-Mail attachment.

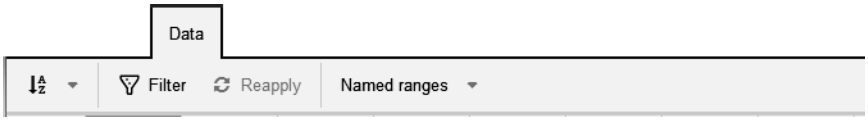
Format toolbar



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

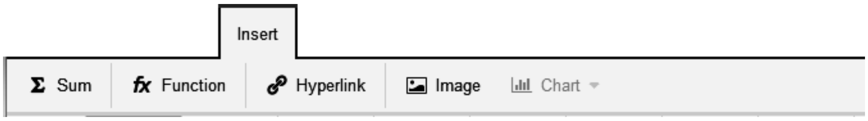
Data toolbar



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.

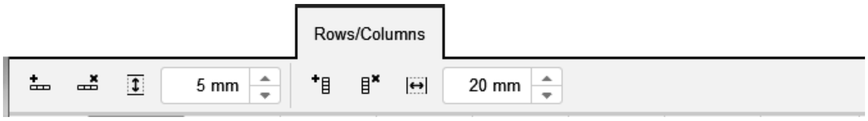
Insert toolbar



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 **toolbar**


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 **toolbar**

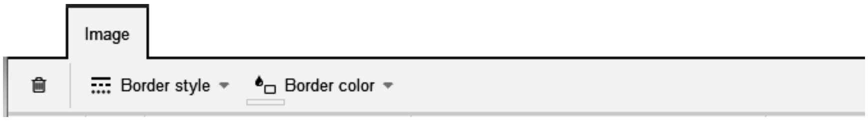


Image
Border style
Border color

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

- Delete image

Chart **toolbar**

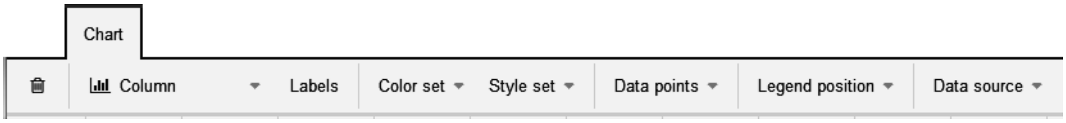


Chart
Column
Labels
Color set
Style set
Data points
Legend position
Data source

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

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

Document window

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

4.3 Creating Spreadsheets

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

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

You can also use a template.

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*. Information on templates can be found in *Templates* (page 31).

   The spreadsheet is shown on the *unnamed* page.
2. Click on **unnamed** in the **File** toolbar. 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 toolbar. Click on **New spreadsheet**.

   In order to use a template, open the template in the *Viewer*. Click on **New from template**.
4. Click on **unnamed** in the **File** toolbar. Enter a name.
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 Opening Spreadsheets

You can open documents that are saved at the following locations:

- in *Drive*
- on a local drive

How to open a spreadsheet that is saved in *Drive*:

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

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

In order to open another document, click on **Open Spreadsheet** in the toolbar. Select a spreadsheet in the *Open document* window. Click on **Open**.

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

Select a spreadsheet. Click on **Edit** in the toolbar.

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 spreadsheet** in the toolbar.

   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 the common techniques from the familiar Office applications.

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

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

   To insert various elements, use the *Insert* toolbar. 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* toolbar.

   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* toolbar.
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 menu bar.

4.6 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. 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** on the upper right side of the document bar. Enter a name for the document.
5. You can now use the functions for editing a spreadsheet.

5 Templates

Learn how to work with templates.

- When creating a new document, you can use an existing template [32].
- You can create a new template [33] from the document that you currently edit.
- You can organize [34] 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 own templates [33].

How to use a template when creating a new document:

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

In the *Drive* app, click on **New from template**.

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

5.2 Creating Templates

You can create own templates by saving the document that you currently edit as new template. The new template will be saved below *My files* in the *Drive* app. You can organize [34] 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 the new template from the global template that you want to change.

2. Edit the content according to your wishes.
3. In the **File** toolbar, click on **Save in Drive**. Select **Save as template**. The *Save as template (dotx)* dialog window opens.

   Select a template folder.

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

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

Similar actions

How to create a new template folder: (p. 34)

5.3 Organizing Templates

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

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

How to create a new template folder:

1. In the *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 sidebar.
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 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 sidebar.
3. Click the **Delete** icon🗑 next to a template folder in the display area.

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

6 Collaboration

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

- You can share documents with other users or external partners. Information and instructions can be found in the Groupware user guide, under the topic *Files and Teams*.
- You can edit a document together with other users [36].

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, for the moment has editing permissions for the document. This person is called current editor. Each person who later opens the document gets read permissions. They are called viewers.
- The viewers can see all changes applied by the current editor.
- A viewer can become 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 *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 single other users. The cursors are highlighted with different colors. 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 toolbar.

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, 35
Create
    spreadsheets, 27
    text document, 16

D

Documentation, 5
Documents, 7

E

Edit
    edit documents together, 36
    spreadsheets, 29
    text documents, 18
edit under a new name
    spreadsheets, 30
    text documents, 19

O

Open
    spreadsheets, 28
    text documents, 17

S

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, 31
    create, 33
    organize, 34
    use, 32
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