Synchronizing and Sharing Data with Drive

User Guide

Synchronizing and Sharing Data with Drive: 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?
This documentation is addressed to users who want to use the Drive app to synchronize files and folders on their desktop or mobile device with the groupware server.

What is assumed in this documentation?
The documentation has been written under the assumption that the user is familiar with using a mobile device.

Which contents are included in the documentation?
This documentation includes the following information:

- In *What is the purpose of the Drive apps?* you will find a description of the Drive apps.
- In *Installing the Drive Apps* you will learn how to install and set up an Drive app on your system.
- In *Using the Drive Apps* you will find details for the practical usage of the Drive apps.

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 the purpose of the Drive apps?

An Drive app is installed locally on your workstation or mobile device. This Drive app enables you to access files and folders that are located on the server. The Drive app synchronizes data between your local machine or mobile device and the server. You define the data to be synchronized:

- In order to synchronize on a workstation, you have to define the following folders:
  - A local folder on your workstation.
  - One or multiple folders on the Groupware server.
- On an Android mobile device, you can further define that photos or videos are uploaded to the server. This function is called Camera Upload.

Each change applied on the server is transferred to the workstation and the mobile devices. Each change applied on the workstation or a mobile device is transferred to the server and other devices.

Depending on the server configuration, you can select the following folders on a workstation for synchronization:

- Personal folders
- Public folders, shared folders

On a mobile device, only the content of your private folder is being synchronized.

You can use the Drive apps to cooperate with other users or external partners by sharing files or folders with read or edit permissions.

The following systems are supported:

- Windows
- macOS
- iOS
- Android

3 Installing the Drive Apps

Learn how to install an Drive app:

- on your workstation
- on your mobile device

Note: To use this function, Drive has to be available on your groupware server. For details contact your administrator or host.

3.1   Installing on a desktop client

How to install an Drive appon your workstation:

1. Use the goupware to download the installation program suitable for your system [7]. Depending on the Groupware server configuration, you have the following options:
   - Click the **system menu** icon▤on the right of the menu bar. Click on **Connect your device** in the menu.
     A wizard will be launched. Follow the instructions in the wizard.
   - Click the **system menu** icon▤on the right of the menu bar. Click on **Settings** in the menu. Click on **Downloads** in the sidebar.
     Follow the download instructions in the display area.

   Depending on the Groupware server configuration, widgets with Drive installation information can be found on the Portal page.

2. Launch the installation program. A wizard guides you through the single steps. Follow the instructions.

   As soon as the installation is completed, the *Setup Wizard* is displayed.

3. On the *Welcome to Drive* page, enter the following details:
   - Your Groupware server username or email address.
   - Your Groupware server password.

   Click on **Next**.

4. If you have entered your username instead of the email address or the server url has not been detected, a window opens that enables you to enter the server url.

5. Depending on the workstation's operating system, the next steps vary:
   - On a Windows workstation, you can define the local folder and the folders on the server that are to be synchronized with each other. You can do so on the *Drivehas been successfully configured and can be started now* page. To do so, click on **Customize folder settings**. The *Folder settings* page opens.
     - To select the local folder, click on **Change** next to **Local folder**. Enter a local folder.
     - To select the folders on the server, click on **Change** next to **Synchronized folders**. Select one or multiple folders on the server.
       To complete the folder settings, click the icon at the bottom.
   - On a macOS workstation you are asked which folders you want to synchronize.

   In the Drive settings, you can re-define those folders after the installation.

   When defining a local folder that already contains data, those data are locally moved to a subfolder. You are informed respectively.

6. In order to complete the configuration, click on **Start now**.

Result: The folders are synchronized. Depending on the data volume this process might take a while.

3.2   Installing on a Mobile Device

How to install an Drive app on your workstation:

1. Visit your mobile device's app store. Install the Drive app.

   You can also find the download links on the Groupware server when clicking on **Downloads** in the sidebar of the groupware settings.

   Depending on the Groupware server configuration, widgets with links to the app stores can be found on the Portal page.

2. As soon as the installation is completed, a wizard guides you through further steps:

   - Enter the server url of the groupware server.
   - Enter your credentials for the groupware server.
   - You can define whether photos and videos are to be uploaded to the groupware server. You can enable or disable this function in the settings at a later time.

   As soon as the configuration has been completed, your personal Drive folders are displayed. In order to make a folder available off-line, proceed as follows:

   a. Tap the menu icon next to the folder.

   b. Enable the menu item **Available offline**.

      Result: The folder contents are downloaded to the mobile device. Thus, they are also available when you are off-line. Depending on the data volume this process might take a while.

4 Using the Drive Apps

As soon as an Drive app is installed, it works in the background without you having to interfere. For information and configuration purposes, certain functions are available though. The functions will vary depending on whether you use an Drive app on a workstation or on a mobile device.

- Functions on a workstation
- Functions on a mobile device
- Usage Guidelines

4.1   On a Workstation

The following functions are available on a workstation:
- Displaying synchronized data (p. 15)
- Changing synchronized folders (p. 15)
- Enabling the Finder extension on macOS (p. 16)
  On a macOS workstation you have to enable the Finder extension before using the functions for opening or sharing.
- Displaying files in the browser (p. 16)
- Editing Office documents in the browser (p. 16)
- You can share files and folders with other users or external partners:
  - Sharing with public links (p. 17)
    You can give this link to other persons. The data are shared with read permissions. Other permissions cannot be granted.
  - Inviting to a shared item (p. 18)
    The data are shared with specific internal users or external partners, with read or edit permissions. The permissions for the single persons are defined by you.
- Pausing the synchronization (p. 19)
- Closing the Drive app (p. 19)
- Settings on a workstation (p. 20)

4.1.1   Displaying synchronized data

How to display synchronized data:

1. Open the Drive icon's context menu.
The Drive icon can be found here:
  - on a Windows system: in the notification area in the task bar
  - on a macOS system: in the status menus of the menu bar

2. In the context menu, use those functions:
  - On a Windows system:
    To display a list of previously changed data, select **Previously changed data**.
    To open the local folder in the file browser, select **Open active Drive folder**.
  - On a macOS system:
    To open the local folder in the file browser, select **Open Drive folder**.

Related topics:

4.1.2   Changing synchronized folders

You can change the folders that are to be synchronized.

How to change the synchronized folders on a workstation:

1. Open the Drive icon's context menu.
The Drive icon can be found here:
  - on a Windows system: in the notification area in the task bar
  - on a macOS system: in the status menus of the menu bar

2. Select **Settings** in the context menu.

3. Select **Accounts** in the *Settings* window. Complete the following actions:
  - On a Windows system:
    Click on **Change synchronized folders** on the **Active account** tab.
  - On a macOS system:
    Click on **Change** next to **Synchronized folders**.

Related topics:

4.1.3 Enabling the Finder extension on macOS

In order to being able to open Office documents or to share objects on a macOS workstation with the help of the Finder, the Drive Finder extension needs to be enabled.

How to enable the Drive Finder extension on a macOS workstation:

1. Open the System Preferences . In the *System Preferences* window, select **Extensions**.

2. In the *Extensions* window, select **Finder**. Enable **Drive Finder Extension**.

Related topics:

4.1.4 Displaying files in the browser

You can open files from the local Drive folder in the browser.

How to display files in the browser:

Note: Before using this function on a macOS workstation, you have to enable the Drive Finder extension.

1. Open the local Drive folder in your system's file browser.

2. Open a file's context menu in the local Drive folder.
   Select **Open in browser**.

Result: The groupware will be opened in the browser. The file will be displayed.

Related topics:

4.1.5 Editing Office documents in the browser

You can open documents in the local Drive folder in the groupware to read or edit them.

How to open Office documents:

Note: Before using this function on a macOS workstation, you have to enable the Drive Finder extension.

1. Open the local Drive folder in your system's file browser.

2. Select **Edit in browser**.

Result: The groupware will be opened in the browser. The file is displayed in the respective app.

Note: Information on editing Office documents can be found in the Documents user guide.

Related topics:

4.1.6   Sharing with public links

You can share data with read access by creating a public link. You can give this link to other persons. Everyone who gets this link can view the data.

You have the following options:

- You can set a password for the access.
- You can define that the link expires after a specific time frame, e.g. after one month.
- You can revoke the public link.

How to share data with read access by using a public link:

> Note: Before using this function on a macOS workstation, you have to enable the Drive Finder extension.

1. Open the local Drive folder in your system's file browser.
2. Open a folder's or file's context menu in the local Drive folder. Select **Create sharing link**.

   If you already shared the selected item, you can change the sharing parameters during the following steps.

   A window opens. It contains a public link for a read access to the share.
3. To share the link, you have the following options:
   - To add the link to other applications, do the following:
     - On a Windows system, click the
       Copy URL to clipboard icon 🗋 next to the link.
     - On a macOS system, click on **Copy link to clipboard**.
   - In order to directly send the link per E-Mail, click on **Send by email**.
     Enter the wanted E-Mail addresses. If required, enter a message.
4. You have the following options:
   - Per default, the data are shared with read access for an unlimited time. To set a time limit for the access to the shared data, enable **Link expires on**. Select a date.
   - To protect the access with a password, enable **Access with password only**. Enter a password.
     To view the password as plain text, click the **Hide or show password** icon.
     If you send the public link per E-Mail, the E-Mail contains the password.
   - In order to revoke the access to a shared item, click on **Remove link**.
5. Click on **Finish**.

Related topics:

4.1.7   Inviting to a shared item

In order to share data with specific persons with read or edit access, you can invite internal users or external partners to a shared item. The users will receive an E-Mail invitation. If an external partner accesses the share, the partner will automatically be logged in as guest user.

How to invite internal users or external partners to a share:

Note: Before using this function on a macOS workstation, you have to enable the Drive Finder extension.

1. Open a folder's or file's context menu in the local Drive folder.

2. Select this function:
   - on a Windows system, select **Invite people**
   - on a macOS system, select **Invite people**

   A window opens. It contains functions for inviting persons to a share.

3. Complete the following actions:
   - On a Windows system, select the **Create invitations** tab. Enter a name or an E-Mail address in **Add recipients**.
     To also share the subfolders, enable **Apply to all subfolders**.
   - on a macOS system, select the **Invite people** tab. Click the **+** icon. Enter a name or an E-Mail address.

   While entering the recipients, matching suggestions are displayed. To accept a suggestion, click on it. 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.

4. To edit the permissions on the **Manage invitations** tab, you have the following options:
   - In order to adjust a user role, click on the currently active role next to the name. Select an entry from the menu.
   - In order to remove a permission, click the respective icon next to the name.

5. If you already shared the selected item, you can change the sharing parameters. To do so, select the **Manage invitations** tab.

6. Click on **Apply**.

Related topics:

Sharing with public links (p. 17)
Enabling the Finder extension on macOS (p. 16)

4.1.8 Pausing the synchronization

You can pause and resume the synchronization.

How to pause the synchronization:

1. Open the Drive icon's context menu.
    The Drive icon can be found here:
    - on a Windows system: in the notification area in the task bar
    - on a macOS system: in the status menus of the menu bar

2. In the context menu, use those functions:
    - On a Windows system:
      Select **Pause synchronization**.
      To continue the synchronization, select **Resume synchronization**.
    - On a macOS system:
      Select **Pause**.
      To continue the synchronization, select **Resume**.

4.1.9 Closing the Drive app

How to close the Drive app:

1. Open the Drive icon's context menu.
    The Drive icon can be found here:
    - on a Windows system: in the notification area in the task bar
    - on a macOS system: in the status menus of the menu bar

2. Select **Close Drive**.

4.1.10 Settings on a workstation

How to use the Drive client settings on a workstation:

1. Open the Drive icon's context menu.

2. Select **Settings** in the context menu.

The settings are different for Windows and macOS.

Preferences, Windows

- **General**
  - **Language**. Defines the language of the Drive app's user interface.
  - **Autostart**. Defines whether the Drive app is automatically launched at the system start.
  - **Windows Explorer Integration**. Defines whether the synchronization status of folders and files is displayed in the Windows Explorer.
- **Account**
  An account includes: Server address, login data, server folders, local folders, storage volume. The following functions are available:
  - **Active account** tab
    If there are multiple accounts: **Inactive accounts**
    You can create multiple accounts and assign different folders to them. Only the folders linked to the active account are synchronized.
  - account name, server web address
  - **Active** button. Indicates that the account is activated.
    If clicking on it, the account will be deactivated. This stops the synchronization. The button changes to **Inactive**. By clicking on it, the account will be activated again.
  - **Change local folder**. Changes the account's folder.
    Note: You cannot change the local folder of an inactive account.
  - **Local folder**. Shows the local folder. If clicking on it, the local folder will be opened in the file browser.
  - **Change synced folder**. Changes the folders that are to be synchronized for this account.
    Note: You cannot change the folders of an inactive account.
  - Active account: available storage, free storage
  - **Delete account**. Finishes the synchronization that has been set up for this account. Deletes the account.
    Notes: When using this function, no data are being deleted, neither locally nor on the server.
  - **New account**. Launches the Drive setup wizard for creating an additional account.
- **Notifications**
  Shows possible errors that occurred during the synchronization. If you are notified about a synchronization interruption, you can click on **Repeat**. If possible, the synchronization is being proceeded.
- **Advanced**
  The following functions are available:
  - **Debugging and Diagnostics**
    - **Server logging**. If this setting is enabled, groupware server notifications are also written to the log file.
    - **SQL logging**. If this setting is enabled, notifications about sql database actions are also written to the log file.
    - **View log file**. Opens the current log file in the default text editor. The scope of the log file content depends on the above mentioned settings.
    - **Save log files**. Saves log files and various system information as zip archive.
  - **Proxy settings**. Allows to change the proxy settings.

- **About**
  Shows information about the Drive app version and the update status. The following functions are available:
    - **Automatic updating**. Defines whether the app checks for a new version upon startup.
    - **Available updates**. Shows whether the app includes the current updates.

Preferences, macOS

- **General**
    - **Language**. Defines the language of the Drive app's user interface.
    - **Autostart**. Defines whether the Drive app is automatically launched at the system start.
- **Account**
  An account includes: Server address, login data, server folders, local folders, storage volume. The following functions are available:
    - the account's name
    - **Local folder:** Shows the local folder. To use another local folder, click on the list. To open the path to the local folder, click the icon next to the list.
    - **Synchronized folders:** To use another server folder for this account, click on **Change**.
    - **Server URL:** Shows the server web address.
      Server version: Shows the server's version number.
    - **Remove account**. Finishes the synchronization that has been set up for this account. Deletes the account.
      Notes: When using this function, no data are being deleted, neither locally nor on the server.
- **Notifications**
  Shows possible errors that occurred during the synchronization. If you are notified about a synchronization interruption, you can click on **Repeat**. If possible, the synchronization is being proceeded.
- **Proxy tab**
  Shows the proxy settings being used. Allows to change the proxy settings.
- **About tab**
  Shows information about the Drive app version and the update status. The following functions are available:
    - **Diagnose mode**. Defines whether comprehensive information are written to the log file. If the diagnose mode is disabled, only shortened information are written. The log files are located in the same directory as the Drive app.

4.2   On a Mobile Device

The following functions are available on a mobile device:

- Viewing, searching, sorting objects (p. 23)
  The objects can be located on the server or on the mobile device.
- Making objects available off-line (p. 24)
  Those objects are downloaded to the mobile device.
- Creating new objects (p. 24)
  Those objects are created on the mobile device and then uploaded to the server.
- Organizing objects (p. 25)
  You can move, rename or delete objects. Those changes are synchronized with the server.
- Sharing objects (p. 26)
  Those objects are respectively shared on the server.
- Using special functions for photos or video (p. 27)
- Settings on a mobile device (p. 28)

4.2.1   Viewing, searching, sorting objects

In order to view objects, you can use the following functions:

- select the objects to be displayed: all objects, specific objects like photos or recently used files, offline available objects
- select view: grid or list
- use search terms to find objects
- sort objects after names, size or date

How to display objects on mobile devices

1. In the Drive app, tap the menu icon. In order to display your personal files and folders on the server, select **All files**.

   To only display specific objects, further views are available:

   - **All images** only shows images and videos.
   - **Recently opened** only shows files that have been recently used by you.
   - **Offline available** only shows the files and folders that you downloaded to your mobile device. Those data are saved locally. This makes those data available even if you have no server connection.
   - **My Shares** only shows the files and folders that you shared with other persons.
   - **Trash** shows the number of objects in the trash and the storage space used by those objects. **Warning:** If you delete objects from the trash, those objects are irrevocably lost. To permanently delete those objects, tap on **Remove all**.

2. You can open a folder by tapping on it.

   Note: Depending on the selected view, folders might not be available.

3. Select one of the following functions from the function bar:

   - In order to select the view, tap the menu icon on the right side. Depending on the view selected, one of the functions is available. **List view**, **Preview view**.
   - In order to sort objects, tap the **Sort** icon.
   - In order to search for objects, tap the **Search** icon. Enter a search term. The objects containing the search term in their names are displayed.

   Note: Depending on the selected view, there are different functions available.

4. In order to display an object's detail view, tap the object.

Related topics:

4.2.2   Making objects available off-line

On mobile devices, you can make objects available off-line by downloading the objects from the server to your mobile device.

How to make single objects available off-line on mobile devices:

1. In the Drive app, tap the menu icon. Select **All files** or another suitable view.

2. Browse the files and folders list to the wanted object.

    Tap the menu icon next to the object.

3. Enable **Available offline**.

    Those objects are downloaded to the mobile device. They are labeled with the **Available offline** icon⊕ .

Tip: To only view the objects that are available off-line, tap the menu icon. Select **Offline**.

Related topics:

4.2.3   Creating new objects

Depending on the mobile device, you can use the following functions to create new objects:

▪ take a new picture

▪ create a new folder

▪ upload a file

How to create a new object on mobile devices:

1. In the Drive app, tap the menu icon. Select **All files**.

2. Open the folder in which you want to create the new object.

3. Tap the **Add** icon ⬤ at the bottom.

4. Select one of the functions from the menu:

    ▪ In order to take and add a new picture, select **From camera**.

    ▪ In order to create a new folder, select **Create folder**

    ▪ To add an existing file, select **Upload file**.

Related topics:

4.2.4   Organizing objects

On mobile devices you can use the following functions for organizing objects:
- move, rename or delete single objects
- move or delete multiple objects

How to move, rename or delete single objects on mobile devices:

> **Warning:** If you delete an object on the Drive app, this object will also be deleted on the server and on all other clients.

1. In the Drive app, tap the menu icon. Select **All files** or another suitable view.
2. Browse the files and folders list to the wanted object.
   Tap the menu icon next to the object.
3. Select one of the functions from the menu:
   - To rename the object, select **Rename**.
   - To move the object, select **Move**.
   - To delete the object, select **Delete**.

How to move or delete multiple objects on mobile devices:

> **Warning:** If you delete an object on the Drive app, this object will also be deleted on the server and on all other clients.

1. In the Drive app, tap the menu icon. Select **All files** or another suitable view.
2. You can open a folder by tapping on it.
3. Tap the menu icon on the right side of the function bar. Tap on **Select**.
   Checkboxes are displayed next to the objects.
4. Select one or multiple objects by tapping on an object.
5. Select one of the following functions below the list:
   - In order to delete the selected objects, tap **Delete**.
   - In order to move the selected objects, tap **Move**.
     Select the folder for moving the objects to.

Related topics:

4.2.5   Sharing objects

You can share objects with read or edit permissions on the mobile device. With this function you can share objects on the groupware server.

How to share objects on mobile devices:

1. In the Drive app, tap the menu icon. Select **All files** or another suitable view.

2. Browse the files and folders list to the wanted object.

   Tap the menu icon next to the object.

3. Select one of the following options:
   - To send an E-Mail invitation for accessing a share to internal users or external partners, select **Invite people**. A new page opens.
     If the item has already been shared with an invitation, the persons' names and permissions are displayed.
     To invite a person to the share, enter the E-Mail address and a message. Tap a preset permission to customize it. To complete the procedure, tap **Invite people** at the bottom.
   - In order to use a public link to share data with read access, select **Get a link**. A new page opens. You can define a validity period for the link and set a password for the access. Click on **Get a link**. The item will be shared on the server.
     As soon as the synchronization is done, the following buttons are displayed:
     - **Copy link**. Copies the link to the clipboard.
     - **Share via**. Opens a page with available apps. Commit the link to the wanted app by selecting the latter.

Note: Comprehensive information on shares and permissions can be found in the groupware user guide.

How to manage your shared objects on mobile devices:

1. In the Drive app, tap the menu icon. Select **My shares**.

2. Browse the files and folders list to the wanted object.

   Tap the share icon next to the object.

   Tap the wanted function in the menu.

Note: Comprehensive information on shares and permissions can be found in the groupware user guide.

Related topics:

4.2.6 Using special functions for photos or video

On a mobile device there are additional functions available for photos and videos:
- Show an overview of your personal photos or videos that exist on the server.
- Copy photos or videos from the server to your mobile phone's photo gallery.

How to display an overview of your personal photos or videos on the server:

1. In the Drive app, tap the menu icon.
2. Select **All images**. The photos or videos in your personal folder on the server are displayed.
   In order to sort the content, tap the **Sort** icon in the function bar.
   In order to change the view, tap the menu icon on the right side of the function bar.

How to copy photos and videos from the server to your mobile device's photo gallery:

1. In the Drive app, tap the menu icon.
2. Select **All files**. Select a folder with photos or videos. This folder's photos and videos on the server are displayed.
3. Tap the menu icon on the right side of the function bar.
   Depending on the device, select the following function:
   - On Android mobile devices: **Save to device**
   - On iOS mobile devices: **Save to Camera Roll.**
   Checkboxes are displayed next to the photos. Select single photos or videos or tap on **Select all**.
4. Tap on **Save**. The photos are copied to the to the **Drive** subfolder in the local photo gallery .

Related topics:

4.2.7   Settings on a mobile device

How to use the Drive app settings on a mobile device:

1. In the Drive app, tap the menu icon.

2. Select **Settings**.

The following settings are available:

▪ **Sign out**
Signs you out. Stops the synchronization. Warning: All app data will be deleted from your device.

▪ **Storage space**
Displays information about the quota limit on the groupware server.

▪ **Camera upload settings**
Sets whether photos or videos taken with the mobile device are transferred to the server.

   ▫ **Camera upload**. Enables or disables the upload.

   ▫ **Include videos**. Defines whether videos are also uploaded.

   ▫ **Upload**. Defines whether all photos and videos are uploaded or only photos that you take or videos that you make after having enabled this function.

4.3   Notes

Changing the password
You can not change the password in Drive. Drive uses the same password that you use for accessing the groupware.

Name restrictions
In order to successfully synchronize files and folder, their names must not contain certain characters.

- Files and folders are not synchronized if their names include one of the following characters:
  < > : " / \ | ? *

- Files are not synchronized if their name corresponds to a reserved device name:
  CON, PRN, AUX, NUL, COM1, COM2, COM3, COM4, COM5, COM6, COM7, COM8, COM9, LPT1, LPT2, LPT3, LPT4, LPT5, LPT6, LPT7, LPT8, LPT9

- The following files are not synchronized:
  desktop.ini, Thumbs.db, .DS_Store, icon\r
  files with the name extension .drivepart
  certain temporary files, e.g. lock files from Office applications

- The following folders are not synchronized:
  /.drive

Depending on the development status of the software, further files and folders might not be synchronized.

Upper and lower case in file names
On some systems the file names in the folders are case sensitive. If you create such files in your local folder, only one of those files will be synchronized. Do not use file names that differ only as regards the upper and lower cases in your local folder.

Length of file and path names in MS Windows
Data on a MS Windows workstation can only be synchronized if the file names or paths do not exceed 255 characters.

Do not edit several files at once
To avoid loss of data you should not edit a file in the local and the remote folder or on several clients at the same time.

File versions
If you change a file in the local folder, Drive creates a new file version in the remote folder. In the local folder only the current file version is displayed.

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