Open-Xchange Server

Quick Guide

Open-Xchange Server: Quick Guide

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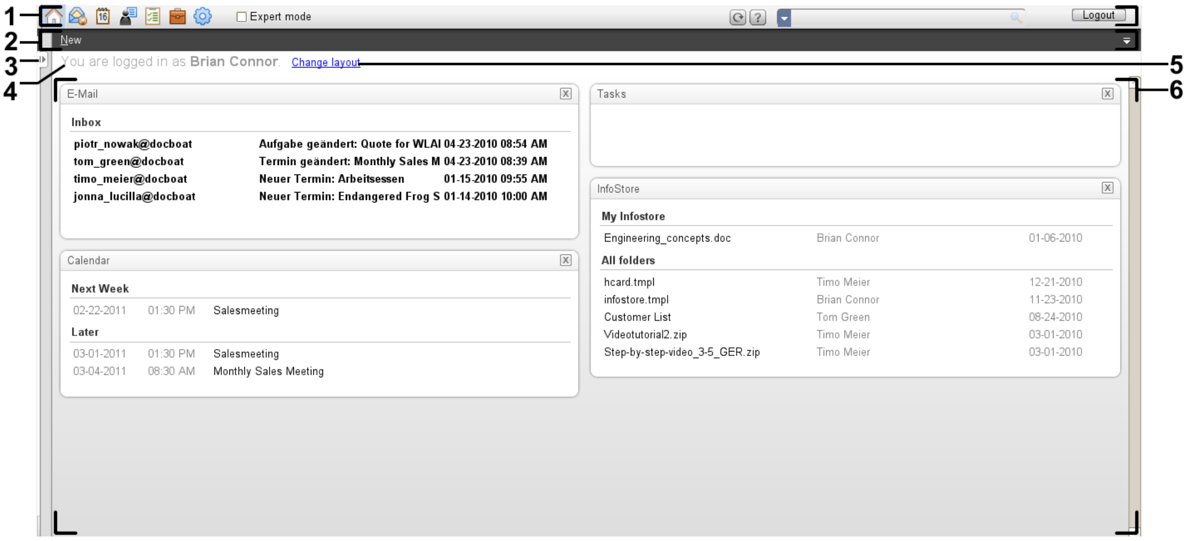
Chapter 1. The Start page

1.1. The start page interface

Directly after the login the start page is displayed.

1.1.1. Elements of the start page

The Start page:

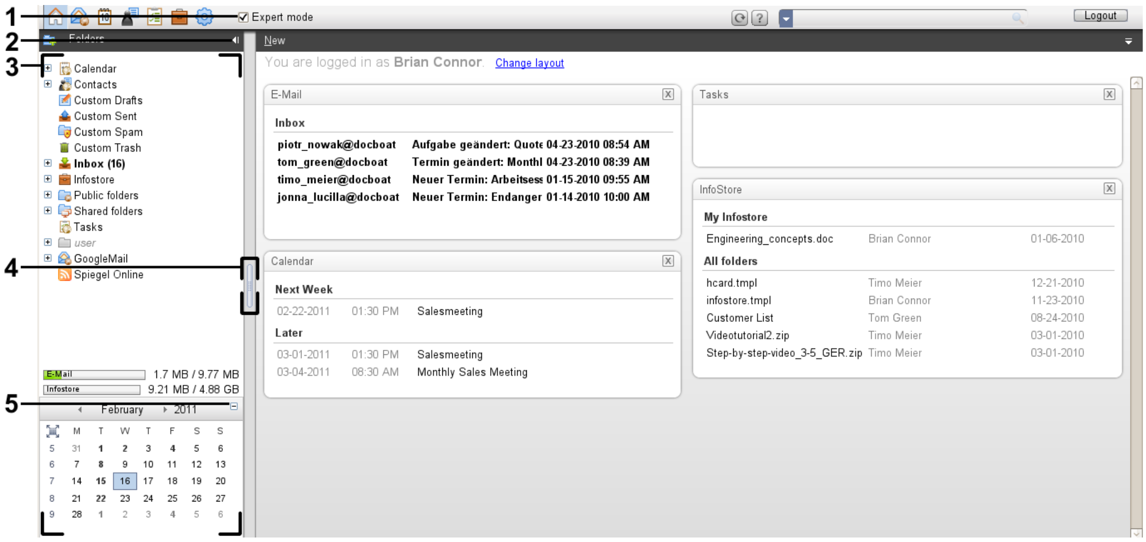


The start page contains the following elements:

No.	Element	Function
1	Title bar	Contains from the left to the right: Icons for accessing the modules A button for accessing the help and a button for refreshing Search input field Logout button
2	Panel	Contains the functions that are available on the start page.
3	**Expand sidebar** icon	Expands the sidebar. The folder tree and the mini calendar will be displayed. Information about the sidebar can be found in 1.1.2: The sidebar (page 2).
4	Login name	Displays the login name of the logged in user.
5	**Change layout** button	Displays control elements for configuring the overview window.
6	Overview window	Shows module windows with current objects. Each module window has its own title bar.

1.1.2. The sidebar

The start page with an enhanced sidebar:



The following elements are available or have an effect on the sidebar:

№	Element	Function
1	**Expert mode** checkbox	Displays the complete folder tree in the sidebar.
2	**Collapse sidebar** icon	Collapses the sidebar. **Note:** The sidebar on the start page will also be collapsed when activating the **Expert mode** checkbox.
3	Sidebar	Contains the following elements: The folder tree. It displays the folder structure of the groupware elements. The used and free memory space in the current module. Depending on the folder tree displayed this information is completely or partly collapsed. The mini calendar. It displays the current date and enables you to access the calendar module.
4	Screen separator	Changes the sidebar width.
5	**Close mini calendar** icon	Closes the mini calendar, so that only the navigation elements for the month and year are displayed.

A description of the start page with enhanced sidebar can be found in 1.1.1: Elements of the start page (page 1).

1.1.3. The title bar

The title bar contains the following elements:

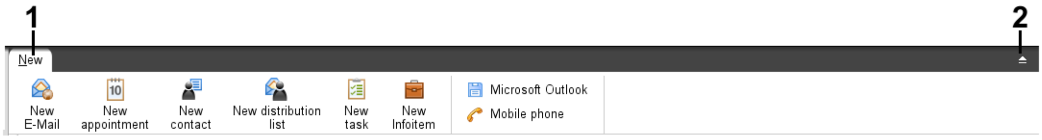
No	Element	Function
1	**Start page** icon	Switches to the start page.
	E-Mail icon	Switches to the E-Mail module.
	Calendar icons	Switches to the calendar module.
	Contacts icon	Switches to the contacts module.
	Tasks icon	Switches to the tasks module.
	InfoStore icon	Switches to the InfoStore module.
	Options icon	Switches to the options module.
	Expert mode checkbox	Activates or deactivates the complete folder tree.
2	**Help** icon	Opens the online help, the most recent error messages, and information about the groupware version number.
3	**Refresh** icon	Click this button to retrieve new objects from the server. Objects are automatically refreshed in frequent intervals regardless of clicking this button. An animated icon on the button displays this process.
4	**Logout** button	To finish working with the groupware click this button.

1.1.4. The start page panel

The start page panel:

Collapsed:

Expanded:



№	Panel tab, icon	Function
1	**New**	Create new objects Install the OXtender for Microsoft Outlook, configure mobile phones
2	**Collapse** icon	Expand or collapse the panel

The start page panel, Compact panel setting:

№	Panel section, icon	Function
1	**New**	Create new E-Mail, create new objects
2	**Synchronization**	Install the OXtender for Microsoft Outlook, configure mobile phone

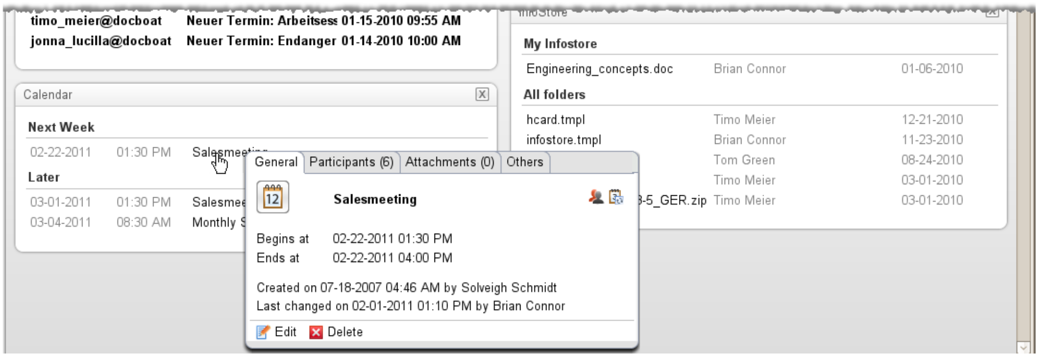
1.1.5. The overview window

The overview window of the start page contains several module windows displaying different entries. The following module windows are displayed by default:

Module window	Functions
E-Mail	Shows the current unread E-Mail. The sender, subject, date and time of the receipt are shown.
Calendar	Displays your current appointments. Shows appointments taking place today, the next two days, next week or later. For each appointment the date, time and description is displayed.
Tasks	Displays your current tasks. Shows tasks taking place today, the next two days, next week or later. For each task the subject, date and priority is displayed.
InfoStore	Displays your current InfoStore items. Shows InfoStore items from your personal InfoStore folder, public InfoStore folders and from shared InfoStore folders of other users.

Module window	Functions
Contacts	Displays the contacts in your personal contact folder. Displays the picture, name, business E-Mail address, business phone number.
UWA modules	An UWA module can be used for customizing the Open-Xchange start page by displaying the contents of other web pages in a module window.

1.1.5.1. Hovers



A hover shows detailed information about the object below the mouse pointer.

How to display a start page object in the hover:

1. Move the mouse pointer over an object in the overview window. After a short delay the hover opens. It displays the **General** tab.
2. To view further information click another tab.
3. To close the hover move the mouse pointer out of the hover.

Tip: You can also open the hover by clicking the button to the right of the object. In order to close the hover afterwards, click outside of the hover. .

You can edit items with the icons in the lower part of the hover.

1.2. Working with the start page

1.2.1. Creating new objects

On the start page you can create new objects like contacts, appointments, tasks, InfoStore items or send new E-Mail without having to switch to the respective module.

How to create a new object:

Click on an icon in the **New** panel tab. A window for entering the data for the new object opens.

Further information about creating objects can be found in the descriptions for the individual modules.

1.2.2. Editing items

You can edit items like E-Mails, contacts, appointments, tasks or InfoStore entries on the start page without switching to the respective module. To do so use the respective icons in the start page hover.

The following functions are available:

Item	Functions
E-Mail	Reply, reply all, forward, delete
Appointment	Edit, delete
Task	Edit, delete
InfoStore entry	Edit, delete

How to edit an item:

1. In the overview window, hover the mouse pointer over an item. After a short delay, the hover opens. It displays the **General** tab.
2. Click a button in the lower part of the hover. Depending on the button you clicked, the respective window opens.
3. Continue by making the required changes or clicking the respective buttons.

1.2.3. Opening modules

Usually you will open the respective module when working with the groupware. There are some alternative ways to do so.

To open a module do one of the following actions:

Click on an icon in the **title bar** .

Click a folder in the **folder tree**.

In the **overview window** click the title of a module window.

To open the **Calendar** module click a day or calendar week in the **MiniCalendar**.

How to switch back to the start page:

Click the **Start page** in the **title bar** icon.

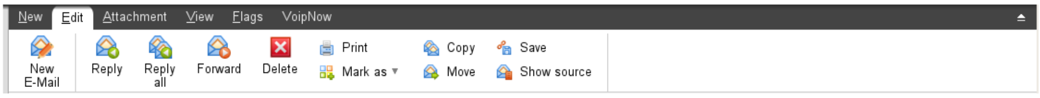
Chapter 2. E-Mail module

2.1. The E-mail module interface

To open the module click the **E-Mail** icon in the title bar .

2.1.1. The E-Mail panel

The E-Mail panel:



The E-Mail panel includes the following functions in different panel tabs:

Panel tab	Functions
New	Create new E-Mail messages or other objects
Edit	Send, reply, forward, delete, print, and manage E-Mail messages
Attachments	Open and save E-Mail attachments, save to infostore **Note:** You need to click an attachment to activate the panel section functions.
View	Set the E-Mail view: H Split, V Split, List

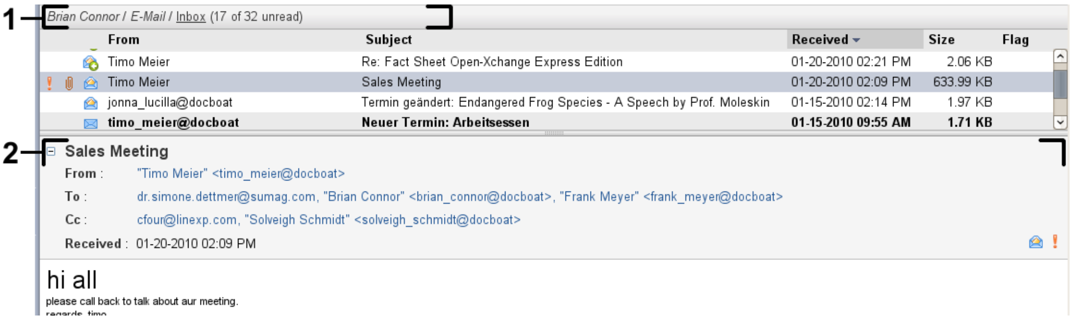
The E-Mail panel, setting Compact panel:

The E-Mail panel contains the following functions:

Panel entry	Functions
New	Compose new E-Mail
▾ icon	Newly create E-Mails or other objects
Reply	Reply to E-Mails
Reply all	E-Mail reply to sender and all recipients
Forward	Forward E-Mails
Delete	Move E-Mails to the Trash or permanently delete them
Print icon	Print an individual E-Mail or a list of E-Mails
Mark as icon	Mark E-Mails as read, unread, unanswered, deleted, or undeleted
Copy icon	Copy E-Mails to the same or to another folder
Save icon	Save E-Mail as file
View	Set E-Mail view: h split, v split, list
Flags	Mark E-Mails with flags

2.1.2. The E-Mail overview window

The E-Mail overview window, **H Split** view:



The E-Mail overview window contains the following elements:

No.	Element	Function
1	Label	Displays the name and path of the current E-Mail folder, the number of unread E-Mail messages, and the number of E-Mail messages in this folder **Tip:** You can browse the folder tree by clicking the underlined parts of the path.
2	Content area	Displays the E-Mail messages in the current E-Mail folder.

2.2. Displaying E-Mails

The following views are available:

- The List view. It displays the E-Mail messages in an E-Mail folder in the form of a table. You can sort the table by clicking a column title.
- The H Split view. In the upper part of the overview window it displays the E-Mail list view and in the lower part it displays the content of the selected E-Mail.
- The V Split view. In the left part of the overview window it displays the E-Mail list view and in the right part it displays the content of the selected E-Mail.

How to display E-Mails:

1. Select an E-Mail folder in the folder tree.
2. In the **View** panel tab click **H Split**, **V Split** or **List**.
3. If you selected **H Split** or **V Split** select an E-Mail in the list view.

Result: The content of the E-Mail is displayed in different tabs.

2.3. Sending E-Mails

You have the following possibilities:

- Sending a new E-Mail
- Replying to an E-Mail
- Forwarding an E-Mail

2.3.1. Sending a new E-Mail

How to send a new E-Mail:

1. In the **New** panel tab click the **New E-Mail** icon. If using the compact panel, click the **E-Mail** icon in the panel. The **E-Mail** window will open.
2. Select a sender address.
3. Select one or more recipients.
4. Enter a subject.
5. Compose the E-Mail text.
6. Use additional options if needed:

   Add attachments.

   Attach your vCard.

   Enter a specific sender.

   Set the priority.

   Request a delivery receipt.

   Details can be found in the user guide and in the online help.
7. Click on **Send** in the panel. The window will close.

Result: The E-Mail is sent. A copy of the E-Mail is saved in the **Sent E-Mails** folder.

Tip: You can also send a new E-Mail by clicking on **Compose E-Mail** in the **Edit** panel tab.

Tip: You can also access the **New E-Mail** function in the panel in other modules. In the H Split or V Split view you can send a new E-Mail by clicking the sender in the E-Mail header.

Tip: In the contacts module you can send an E-Mail to a contact by using the context menu in the card or phone list view.

2.3.1.1. Adding attachments

How to add attachments to an E-Mail in the E-Mail window:

1. In the panel click on **Add attachment > Attach local file**. The **Select attachments** dialog window opens.
2. In the **Select attachments** dialog window click **Browse**. Select the file to be added as an attachment. Close the file selection dialog window.
3. In the **Select attachments** dialog window click **Add**. The file is entered in the list field.
4. To add further attachments repeat steps 2 - 3.
5. To remove an attachment select it in the list field. Then click **Remove**.
6. In the **Select attachments** dialog window click **OK**.

Result: The file names of the attachments are displayed below the E-Mail text.

Tip: In order to attach a document from the infostore, click on the panel entry **Add attachment > Attach InfoEntry**.

2.3.2. Replying to E-Mails

How to reply to an E-Mail:

1. Select an E-Mail in the H Split, V Split, or List view.
2. In the **Edit** panel tab click on **Reply**. If using the compact panel, click the panel entry **Reply**. To also reply to the recipients in CC click **Reply all**. The **E-Mail** window opens.
3. Enter the E-Mail text.
4. Click on **Send** in the panel. The window will be closed.

Result: The E-Mail is sent. A copy of the E-Mail is saved to the **Sent E-Mails** folder.

Tip: You can also use the context menu to reply to an E-Mail.

2.3.3. Forwarding E-Mails

How to forward an E-Mail:

1. Select an E-Mail in the H Split, V Split, or List view.
2. Click on **Forward** in the **Edit** panel tab. If using the compact panel, click the panel entry **Forward**. The **E-Mail** window will open.
3. Select one or more recipients.
4. Enter the E-Mail text.
5. Click on **Send** in the panel. The window will close.

Result: The E-Mail is sent. A copy of the E-Mail is saved to the **Sent E-Mails** folder.

Tip: You can also use the context menu for forwarding an E-Mail.

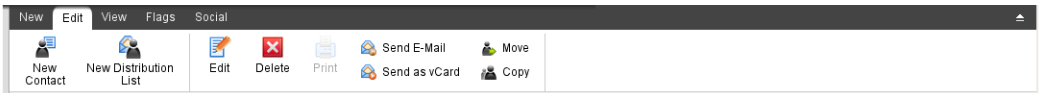
Chapter 3. Contacts module

3.1. The Contacts module interface

To open the module click the **Contacts** icon in the title bar.

3.1.1. The Contacts panel

The Contacts panel:



The Contacts panel contains the following functions in several panel tabs:

Panel tab	Functions
New	Create new contacts or other objects
Edit	Create, edit, delete, print, send, and manage contacts
View	Set the display of contacts: address cards, phone list, and detail
Flag	Mark contacts with flags
Social	Publish contacts from the contacts folder selected, subscribe contacts from the contacts folders selected

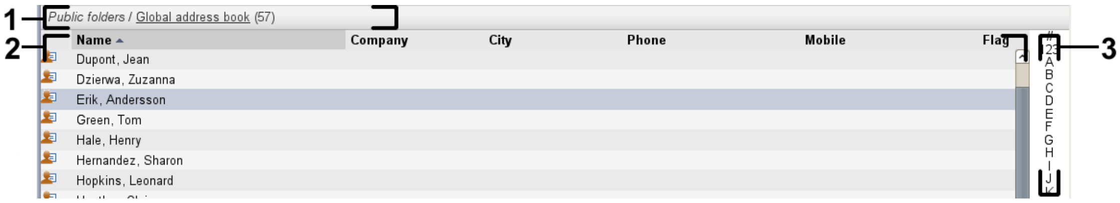
The Contacts panel, setting Compact panel:

The Contacts panel contains the following functions:

Panel entry	Functions
New	Create new contact
▾ icon	Create new objects
Edit	Edit a contact's data
Delete	Permanently delete contact
Print icon	Print the data for a contact or a list of contacts
Send E-Mail	Send an E-Mail to the selected contact
Send as vCard attachment	Send contact as an E-Mail's vCard attachment
Move icon	Move contact to another folder
Copy icon	Copy contact to another folder or to the same folder
View	Set the display of contacts: address cards, phone list, detail
Flags	Mark contacts with flags
Social	Publish contacts from a contact folder selected, subscribe contacts from the contacts folders selected

3.1.2. The contacts overview window

The contacts overview window, **Phone list** view:



The contacts overview window contains the following elements:

No.	Element	Function
1	Labelling	Displays the name and path of the current contacts folder and the number of contacts in this folder. **Tip:** You can browse the folder tree by clicking the underlined parts of the path.
2	Content area	Displays the contacts.
3	Quick filter bar	Allows you to filter the displayed contacts via the first letter of the contacts' last names.

3.2. Viewing contacts

The following views are available:

- The phone list. The contacts are displayed in the form of a table. You can sort the table by clicking a column header.
- The address card view. The contacts of the current contact folder are displayed as address cards.
- The detail view. All information for the contact selected in the phone list or address card view is displayed.

How to display contacts:

1. Select a contact folder in the folder tree.
2. In the **View** panel tab click **Address cards** or **Phone list**.
3. Use the quick filter bar to filter the view.
4. To view all the details for a contact do the following:

    Select a contact.

    In the **View** panel tab click **Details**.

3.3. Creating contacts

How to create a new contact:

1. In the **New** panel tab click the **Contact** icon. If using the compact panel, click the **Contact** panel icon . The **Contact** window will open. The **General** tab is opened.
2. If required select a contact folder by clicking the **Folder** button and selecting a contact folder in the pop-up window.
3. Enter the business data for the contact in the **General** tab.
4. Use further options if needed:

   Add categories.

   If required mark the contact as private.
   Note: You can only mark a contact as private if you create the contact in a personal contact folder.

   If wanted, enter the private data for the contact in the **Private** tab. You can create an appointment series from the contact's date of birth. The serial reminds you of the birthday.

   Add a picture.

   In the **Additional** tab enter further data for the contact.

   Add attachments.

   Details can be found in the user guide and in the online help.
5. Click **Save** in the panel. The window will close.

Result: The contact is created.

Tip: You can also create a new contact by clicking on **Create new contact** in the **Edit** panel tab.

3.4. Managing contacts

3.4.1. Searching for contacts

You can find contacts in the current contacts folder via a search term. The search term defines the character string to be searched for. If suitable, the search term can include the "*" character as wildcard for any character. The search criteria defines which contact data are to be searched for the search term.

The following contact data can be used as search term:

- First name, surname, displayed name
- E-Mail, E-Mail (private), E-Mail (other)
- Company, department
- Location, Street
- Tags

How to search for a contact:

1. Select a contact folder for the search in the folder tree .
2. Select the Address card or Phone list view.
3. To select one or more search criteria click the icon on the left of the **Search** input field.
4. Enter the search term in the input field.
5. Click the **Search** icon .

6. In order to delete the search term, click the **Reset** icon .

Result: The overview window only displays the contacts matching the search term.

How to display all contacts from the current contact folder:

In the quick filter bar click on **All**.

3.4.2. Editing contacts

How to edit a contact:

1. Display a contact in the Detail view or select a contact in the Address card or Phone list view.
2. In the **Edit** panel tab click **Edit**. If using the compact panel, click the panel entry **Edit**. The **Contact** window will open.
3. Edit the contact's data.
4. Click **Save** in the panel. The window is closed.

Result: The contact is updated.

Tip: In the Address card or Phone list view you can also edit contacts by using the context menu or by double-clicking the contact.

3.4.3. Sending contacts as a vCard attachment

You can send contacts from a contact folder as E-Mail vCard attachments.

How to send contacts as vCard attachment:

1. In the Card or Phone list view select one or more contacts.
2. In the **Edit** panel tab click on **Send as vCard**. If using the compact panel, click the panel entry **Send as vCard**. The **E-Mail** window opens. A vCard is attached for each selected contact.
3. Complete and send the E-Mail.

Result: The E-Mail will be sent with the vCard attachments.

Tip: You can also use the context menu to send contacts as vCard attachments.

Chapter 4. Calendar module

4.1. The calendar module interface

To open the module click the **Calendar** icon in the title bar.

4.1.1. The calendar panel

The Calendar panel:

The calendar module contains the following functions in different panel tabs:

Panel tab	Functions
New	Create new appointments or other objects
Edit	Create, edit, delete, print, and manage appointments, change confirmation
View	Set an appointment view: Calendar or Team, List. Set a time range for the calendar display: Day, Work week, Month, Week, or Custom
Flag	Mark appointments with flags
Social	Subscribe appointments from the calendar folders selected

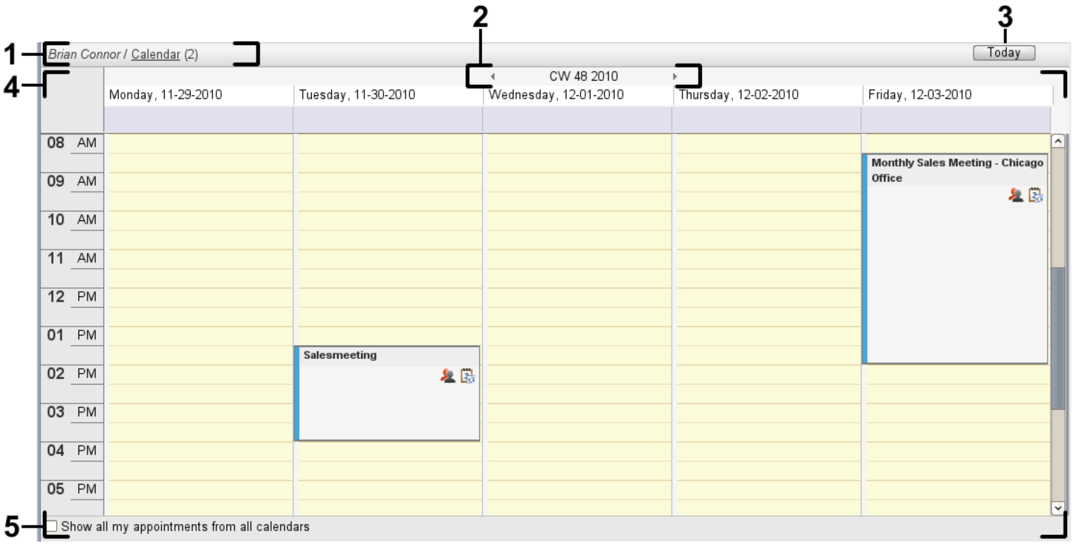
The Calendar panel, setting Compact panel:

The Calendar panel contains the following functions:

Panel entry	Functions
New	Create a new appointment
▼ icon	Create new objects
Edit	Edit an appointment's details
Delete	Permanently delete appointment
Confirmation	Change an appointment confirmation
Print icon	Print the data for an appointment, a list of appointments, or a calendar sheet
Move	Move appointment to another folder
View	Set the display of appointments: calendar, team, list, detail
Time range	Set calendar time range: Day, Work week, Month, Week, customized
Flags	Mark appointments with flags
Social	Subscribe appointments to the calendar folder selected

4.1.2. The calendar overview window

The calendar overview window, **Calendar** view, **Week** time range:



The calendar overview window contains the following elements:

No.	Element	Function
1	Labelling	Displays the name and the path of the current calendar folder and the number of appointments in the folder. **Tip:** You can browse the folder tree by clicking the underlined parts of the path. **Note:** Labelling is not shown in the team view.
2	Date bar	Displays the date of the current time range. On both sides of the date there are navigation arrows that allow you to change the current time range.
3	**Today** button	Displays the time range containing the current date in the overview window and in the MiniCalendar. The selected view, Calendar, Team, or List remains in the overview window.
4	Content area	Displays the calendar and the appointments.
5	**Show all my appointments from all calendars** checkbox	If this checkbox is activated all your appointments from all calendar folders are displayed. If this checkbox is deactivated only your appointments from the current calendar folder are displayed.

4.2. Viewing the calendar and appointments

The following views are available:

- The Calendar view. This view displays a calendar sheet comprising a particular time range such as Day, Week, or Month. An appointment is displayed in the form of a rectangle.
- The Team view. This view shows the appointments for users and groups and the resources booked for the individual appointments. A user can create teams. They will remain after the logout.
- The List view. This view shows the appointments for a specific time range in a table form.
- The Detail view. This view shows all information for the appointment selected in the Calendar or List view.

How to display a calendar and its appointments:

1. Select a calendar folder in the folder tree.
2. In the **View** panel tab click **Calendar** or **List**.
3. In the **View** panel tab select a time range.
4. To view all the details of an appointment do the following:

   Select an appointment.

   In the **View** panel tab click **Details**.

4.3. Creating appointments

How to create a new appointment:

1. In the **New** panel tab click the **Appointment** icon. If using the compact panel, click the **Appointment** panel icon . The **Appointment** window opens. The **Appointment** tab is opened.
2. If required, select a calendar folder by clicking the **Folder** button and selecting a calendar folder in the pop-up window.
3. Enter a description, a location, and a comment for the appointment.
4. Select a start and end date for the appointment. .
5. Set the appointment reminder. .
6. Select the availability view: Booked, Tentative, Absent on business, or Free.
7. Use additional options if needed:

   Create an appointment series. .

   Add categories to the appointment. .

   If required, mark the appointment as private. .

   Add further participants and resources to the appointment. Check whether the participants and resources are available for the appointment. .

   Add attachments to the appointment. .

   Details can be found in the user guide and in the online help.
8. Click **Save** in the panel. The window will close.

Result: The appointment is created.

Tip: You can also create a new appointment by clicking on **Create new appointment** in the **Edit** panel tab.

4.4. Managing appointments

4.4.1. Editing appointments

How to edit an appointment:

1. Display an appointment in the Detail view or select an appointment in the List view, a calendar view, or the team view.
2. In the **Edit** panel tab click **Edit** If using the compact panel, click the panel entry **Edit**. . The **Appointment** window opens.
3. Edit the appointment data. A comprehensive description can be found in 4.3: Creating appointments.
4. Click **Save** in the panel. The window is closed.

Result: The appointment is modified.

How to edit an appointment title:

1. Select an appointment in the calendar view.
2. Click on the appointment title.
3. Edit the title.
4. Press Enter.

4.4.2. Editing appointments with drag & drop

How to drag an appointment to another day:

1. Display an appointment in the Work week, Month, Week, or Custom calendar view.
2. Move the mouse pointer over the rectangle displaying the appointment. The mouse pointer changes to a hand icon.
3. Drag the appointment to another day in the time range or to a day in the MiniCalendar.

Result: The appointment is moved to the selected day.

How to change the time of an appointment:

1. Display an appointment in the Day, Work week, or Custom calendar view.
2. Move the mouse pointer over the rectangle displaying the appointment. The mouse pointer changes to a hand icon.
3. Drag the appointment to another time in the time range.

Result: The appointment is moved to the selected time.

How to change the start or end date of an appointment:

1. Display an appointment in the Work week or Custom calendar view.
2. Move the mouse pointer to the upper or lower border of the rectangle displaying the appointment. The mouse pointer changes to a double-arrow.
3. Drag the border up or down to another time in the time range.

Result: The start or end of the appointment is changed.

4.4.3. Synchronizing appointments with CalDAV

CalDAV helps you access the Open-Xchange Server calendar and synchronize appointments with client software like Mozilla Thunderbird.

Note: In order to use this function, CalDAV has to be available on the Open-Xchange Server. If you are unsure, contact your administrator or hoster.

4.4.3.1. Synchronizing with Thunderbird

The following preconditions have to be met:

- The current version of Mozilla Thunderbird is installed.
- The current Thunderbird Lightning add-on is installed. This add-on includes an application fpr appointments and tasks.
- The access to your Open-Xchange E-Mail account is set up in Thunderbird.

Note the following limitations:

- Thunderbird can only synchronize single calendar folders. In order to synchronize multiple calendar folders between the Open-Xchange groupware and Thunderbird, you have to separately set up the synchronization for each single calendar folder.
- The following reminders are not supported by the Open-Xchange Server:
  - Reminders that are sent after the appointment's start
  - Multiple reminders
  - Reminders that are not of the type 'DISPLAY'

  If you set up such a reminder for an appointment or a recurrence in Thunderbird, the reminder is removed by the Open-Xchange Server.
- The property "URL" for iCal resources is not supported.
- File attachments are not supported.
- Appointments marked as "privat" are exported with the property "CLASS" set to "PRIVATE" by the Open-Xchange Server.
- The properties "CONFIDENTIAL" and "PRIVATE" are treated in the same way by the Open-Xchange Server and are imported as "PRIVATE".

Warning: The Open-Xchange Server does not support private appointments with multiple participants. If you mark an appointments with several participants as **Private appointment** in Thunderbird, the Open-Xchange Server removes the participants without notifying you.

How to access your calendar in Thunderbird:

1. Check the following requirements:

   Thunderbird has network access.

   The Open-Xchange Server is accessible.
2. Right-click on a calendar folder in the Open-Xchange Groupware. Select **Properties**. Note the value of **CalDAV URL** or copy it to the clipboard.
3. In the Thunderbird menu bar click on **Appointments and Tasks > Calendar**.
4. In the menu bar click on **File > New > Calendar**. The **Create new calendar** widnow opens.
5. Select **In the netzwork**. Click on **Next**.
6. Select the format **CalDAV**. As **Address** use the value requested in step 2. In order to have access to the appointments without Internet connection, activate **Cache**. Click on **Next**.
7. In **Name** enter a name for the calendar folder. You can select a color for the calendar. Set whether appointment reminders should be displayed. Select an E-Mail address. Click on **Next**.
8. If you are asked for crendentials, use the username and the password for the Open-Xchange Server.

Result: After a short while the calendar folder will be synchronized.

In order to synchronize further calendar folders repeat the steps for each calendar folder.

Chapter 5. Tasks module

5.1. The tasks module interface

To open the module click the **Tasks** icon in the title bar.

5.1.1. The tasks panel

The Tasks panel:

The tasks panel contains the following functions in different panel tabs:

Panel section	Functions
New	Create new tasks or other objects
Edit	Create, edit, delete, print, and manage tasks
View	Set the display of tasks: H Split, List
Flag	Mark tasks with flags

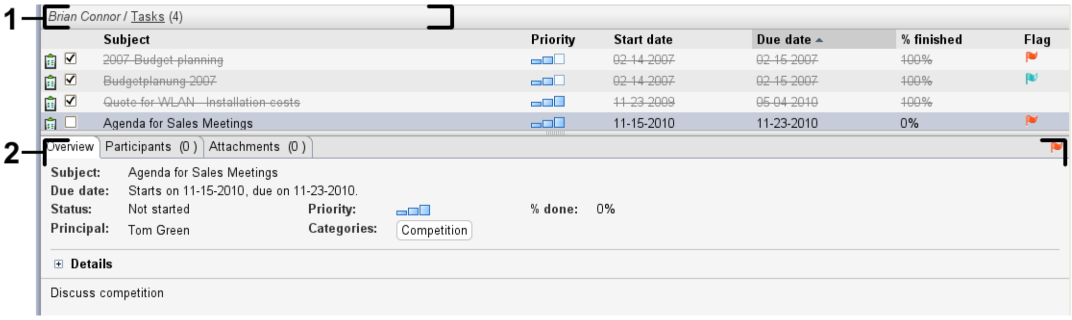
The Tasks panel, setting Compact panel:

The Tasks panel contains the following functions:

Panel entry	Functions
New	Create new task
▾ icon	Create new objects
Edit	Edit a task's data
Delete	Permanently delete task
Print icon	Print a task's data or a list of tasks
Confirmation	Change a task's confirmation
Move	Move task to another folder
Use as template icon	Use task as template for a new task
View	Set the display of tasks: h split, list
Flags	Mark tasks with flags

5.1.2. The tasks overview window

The tasks overview window, **List** view:



The tasks overview window contains the following elements:

№	Element	Function
1	Labelling	Displays the name and path of the current tasks folder and the number of tasks in this folder. **Tip:** You can browse the folder tree by clicking the underlined parts of the path.
2	Content area	Displays the tasks.

5.2. Viewing tasks

The following views are available:

- The H Split view. This displays the tasks list view in the upper part of the overview window and the details of the selected task in the lower part of the overview window.
- The List view. This displays the tasks in the form of a table.

How to display tasks:

1. Select a tasks folder in the folder tree.
2. In the **View** panel tab click **H Split** or **List**.
3. If you selected **H Split** select a task in the list view.

Result: The content of the selected task is displayed in different tabs.

5.3. Creating tasks

How to create new tasks:

1. In the **New** panel tab click the **Task** icon. If using the compact panel, click the **Task** panel icon . The **Task** window opens. The **Task** tab is displayed.
2. If requested select a tasks folder by clicking the **Folder** button and selecting a tasks folder in the pop-up window.
3. Enter a subject and notes for the task.
4. Set the priority of the task.
5. Set the due date and the start date.
6. Set the task reminder.
7. If requested use additional options:

    Mark the task as private.

    Create a task series.

    Add categories to the task.

    Set the details for the task.

    Add further participants to the task.

    Add attachments to the task.

    Details can be found in the user guide and in the online help.
8. Click **Save** in the panel. The window is closed.

Result: The task is created. The editing status is set to **Not started** or **0 % finished**.

Tip: You can also create a new task by clicking on **Create new task** in the **Edit** panel tab.

The **New task** function can also be invoked in other modules in the panel.

In the H Split or List view double-click a free area. The **Task** window opens.

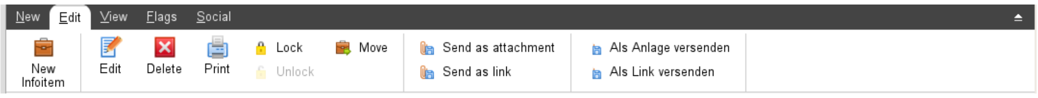
Chapter 6. InfoStore module

6.1. The InfoStore module interface

To open the module click the **InfoStore** icon in the title bar .

6.1.1. The InfoStore panel

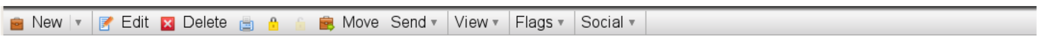
The InfoStore panel:



The InfoStore panel contains the following functions in different panel tabs:

Panel section	Functions
New	Create new InfoStore entries or other objects
Edit	Create, edit, delete, print, and manage InfoStore entries Send InfoStore entries by E-Mail
View	Set the display of InfoStore entries: H Split, List
Flag	Mark InfoStore entries with flags
Social	Publish InfoStore entries from the InfoStore folder selected, subscribe data from the InfoStore folder selected

The InfoStore panel, setting Compact panel:

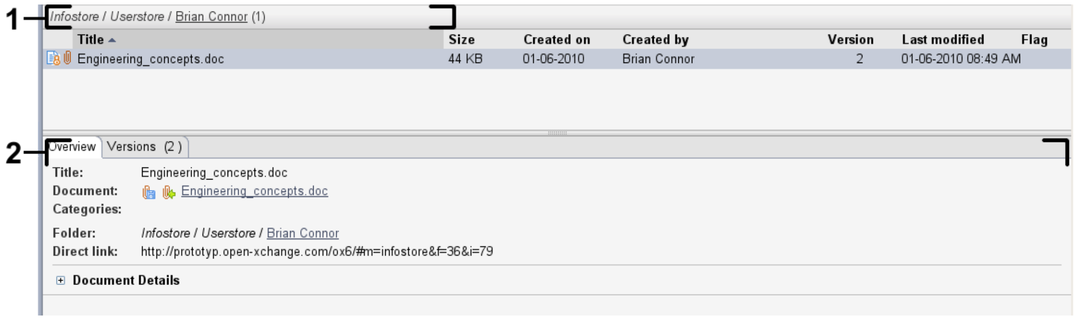


The infostore panel contains the following functions:

Panel entry	Functions
New	Create new Infostore item
|▼ icon	Create new objects
Edit	Edit an infostore item's data
Delete	Permanently delete infostore item
Print icon	Print an infostore item's data or print a list of infostore items
Lock icon	Mark infostore item as locked
Unlock icon	Unlock an infostore item
Move	Move infostore item to another folder
Send	Send infostore item as an E-Mail's attachment or link
View	Set the display if infostore items: h split, list
Flags	Mark infostore items with flags
Social	Publish InfoStore entries from the InfoStore folder selected, subscribe data from the InfoStore folder selected

6.1.2. The InfoStore overview window

The InfoStore overview window, **List** view:



The InfoStore overview window contains the following elements:

No.	Element	Function
1	Labelling	Displays the name and path of the current InfoStore folder and the number of InfoStore entries in this folder. **Tip:** You can browse the folder tree by clicking the underlined parts of the path.
2	Content area	Shows the InfoStore entries.

6.2. Viewing InfoStore items

The following views are available:

- The H Split view. This displays the List view for the InfoStore items in the upper part of the overview window and all details of the selected InfoStore item in the lower part of the overview window.
- The List view. This displays the InfoStore items in the form of a table.

How to display InfoStore items:

1. Select an InfoStore folder in the folder tree.
2. In the **View** panel tab click **H Split** or **List**.
3. If you selected **H Split** select an InfoStore item in the list view.
   Result: The content of the selected InfoStore item is displayed in different tabs.

6.3. Creating an InfoStore item

How to create a new InfoStore item:

1. In the **New** panel tab click the **Document** icon. If using the compact panel, click the panel icon **InfoEntry** . The **Document** window opens.
2. If requested select an InfoStore folder by clicking the **Folder** button and selecting an InfoStore folder in the pop-up window.
3. Enter a title in the **Title** field.
4. Depending on your needs, use the following options:

   Add a bookmark for a website by entering an Internet address in the **Link/URL** field. **Tip:** Copy the Internet address from the browser's address bar to the field.

   Add a document.

   Add categories.

   Add comments.

   Details can be found in the user guide and in the online help.
5. Click **Save** in the panel. The window is closed.

Result: The InfoStore item is created.

Tip: You can also create a new InfoStore item by clicking on **Create new document** in the **Edit** panel tab.

You can also activate the **New InfoStore item** function in other modules in the panel.

Double-click a free area in the H Split or List view. The **InfoStore item** window opens.

6.3.1. Adding a document

How to add a document to the InfoStore item in the InfoStore item window:

1. Click the **File** button.
2. Click the **Browse** button.
3. Select the file to be added as an attachment. Close the file selection dialog window.
4. Click **Save** in the panel. The **Version comment** window opens.
5. If you want enter a comment in the **Version comment** window. Click **OK**. If you do not want to enter a comment click **No comment**.

Result: The document is uploaded to the server. As soon as the upload is finished the **InfoStore item** window is closed.

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