

---

# **Synchronising and Sharing Data with Drive**

**User Guide**

---

## **Synchronising and Sharing Data with Drive: User Guide**

Publication date Wednesday, 23. March 2016 Version 2.0

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

<b>1 About this Documentation .....</b>	<b>5</b>
<b>2 What is the Purpose of the Drive Apps? .....</b>	<b>7</b>
<b>3 Installing the Drive Apps .....</b>	<b>9</b>
3.1 Installing on a desktop client .....	10
3.2 Installing on a Mobile Device .....	11
<b>4 Using the Drive Apps .....</b>	<b>13</b>
4.1 On your Workstation .....	14
4.1.1 Displaying synchronised data .....	14
4.1.2 Changing synchronised folders .....	14
4.1.3 Setting up additional accounts .....	14
4.1.4 Opening Office documents .....	14
4.1.5 Sharing objects .....	15
4.1.6 Pausing the synchronisation .....	15
4.1.7 Drive Closing an app .....	16
4.1.8 Settings on a workstation .....	16
4.2 On a Mobile Device .....	19
4.2.1 Viewing, searching, sorting objects .....	19
4.2.2 Making objects available off-line .....	19
4.2.3 Creating new objects .....	20
4.2.4 Organising objects .....	20
4.2.5 Sharing objects .....	21
4.2.6 Using special functions for photos or video .....	21
4.2.7 Settings on a mobile device .....	22
4.3 Notes .....	24



---

# 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 users who want to synchronize files and folders on their desktop or mobile device with the groupware server. To be able to do so, an Drive app has to be locally installed. 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?

Drive apps allow synchronising data between your local machine or mobile device and the Groupware Server. You define the data to be synchronised:

- In order to synchronise on a workstation, you have to define the following folders:
  - A local folder on your workstation.
  - A remote folder or multiple remote folders on the Groupware server.
- On a mobile device, you select the objects to be synchronised by marking those objects as available off-line.

On a mobile device, you can further define that photos or videos are uploaded to the server. This function is called photostream.

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.

The following changes are synchronised.

- new files
- file content changes
- file renamings
- file deletions
- new folders
- folder renamings
- folder deletions

On the server, you can select the following folders for synchronising.

- Personal folders
- Public folders, shared folders

Depending on the server configuration, some folders can not be used for synchronisation.

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:

- MS Windows
- Mac OS
- 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 app on your workstation:

1. Download the installation program suitable for your [system \[7\]](#).  
You will find the installation program for your MS Windows or Mac OS workstation by clicking on **Downloads** in the side bar of the groupware settings. The installation program for your Mac OS workstation can be found in the respective app store.  
Depending on the Groupware server configuration, widgets with installation information can be found on the Portal page.
  2. Launch the installation program. A wizard guides you through the individual 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's web address (URL).
    - Your username and password for the Groupware Server.Click on **Login**. You will be logged in to the Groupware Server.
  4. The procedure for defining the folders to be synchronised is different for each operating system running on the workstation.
    - On an MS Windows workstation, you can define the local folder and the folders on the server that are to be synchronised with each other. You can do so on the *Drive has been successfully configured and can be started now* page. To do so, click on **Customise 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 *Synchronised folders*. Select one or multiple folders on the server.  
To complete the folder settings, click the icon at the bottom.
    - On a MAC OS workstation you are asked which folders you want to synchronize.  
You can re-define those folders after the installation.  
When defining a local folder that already contains data, that data is moved to a local subfolder. You are respectively informed.
  5. In order to complete the configuration, click on **Start now**.
- Result:** The folders are synchronised. 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 side bar 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 additional 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:

Tap the menu icon next to the folder.

Enable the menu item **Available off-line**.

**Result:** The folders are synchronised. 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 your Workstation

The following functions are available on a workstation:

- [display](#) synchronised data
- [change](#) synchronised folders
- [set up](#) further accounts to synchronise additional folders
- [open](#) Office documents in the local folder
- use [shares](#) to share files and folders with other users or external partners.
- [stop or resume](#) the synchronisation.
- Drive [close](#) app.
- [customise](#) settings

### 4.1.1 Displaying synchronised data

**How to display synchronised data:**

1. Open the Drive icon's context menu.
2. Use the following options:
  - To display a list of previously changed data, select **Previously changed data**.
  - To open the local folder in your system's file browser, select **Open Drive folder**.

**Tip:** Depending on the installation, you can also open the local folder with the Drive desktop icon.

### 4.1.2 Changing synchronised folders

You can change the folders that are to be synchronised.

**How to change the folders on a workstation that are to be synchronised:**

1. Open the Drive icon's context menu.
2. Select **Settings** in the context menu.
3. On the *Settings* page, select **Sync Option**. The settings are displayed separately for each account.
  - To change the folders that are to be synchronised, click on the respective buttons.

### 4.1.3 Setting up additional accounts

You can set up additional accounts to synchronise data located in other folders.

**How to set up an additional account:**

1. Open the Drive icon's context menu.
2. Select **Settings** in the context menu.
3. On the *Settings* page, select **Account**.
  - Click on **New account**. The setup wizard will be opened.
4. Enter the server address and your credentials. Click on **Login**.
  - On the next page, click on **Customise folder settings**. Select the folders to be synchronised.

### 4.1.4 Opening Office documents

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

### How to open Office documents:

1. Open the local Drive folder in your system's file browser.
2. Open the context menu of a text document or a spreadsheet in the local Drive folder.

To display the document, select this function:

- on an MS Windows system: **Drive > Preview in App Suite**
- on a Mac OS system: **Preview in App Suite**

To edit the document, select this function:

- on an MS Windows system: **Drive > Edit in App Suite**
- on a Mac OS system: **Edit in App Suite**

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

## 4.1.5 Sharing objects

You can share contents of the local Drive folder with read or edit permissions. With this function you can share objects on the groupware server.

### How to share objects on a workstation:

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 one of the following options:

- To send an E-Mail invitation for accessing a share to internal users or external partners, select this function:
  - on an MS Windows system: **Drive > Invite people**
  - on a Mac OS system: **Invite people**

On the next page you can define the permissions for the share.

- To share data with read permissions, select this function:
  - on an MS Windows system: **Drive > Get a link**
  - on a Mac OS system: **Get a link**

On the next page you can set the period of validity for the link and a password for the access.

You can send the link and the password by E-Mail, Messenger or in a social network.

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

## 4.1.6 Pausing the synchronisation

You can pause and resume the synchronisation for all accounts or for one single account.

### How to stop the synchronisation for all accounts:

1. Open the Drive icon's context menu.
2. Select **Pause synchronisation**.

To continue the synchronisation, select **Resume synchronisation**.

**How to stop the synchronisation for a single account:**

1. Open the Drive icon's context menu.
2. Select **Settings** in the context menu.
3. On the *Settings* page, select **Sync Option**. The settings are displayed separately for each account. Complete the following actions:
  - On an MS Windows system:  
To stop the synchronisation for an account, click the **Sync on** icon in the account settings. The synchronisation stops. The icon's label changes to **Sync off**.  
To resume the synchronisation, click on **Sync off**. The icon's label changes to **Sync on**.
  - On a Mac OS system:  
Open an account's settings.  
Disable the checkbox **Allow syncing files in this account**.

## 4.1.7 Drive Closing an app

**How to close the Drive app:**

1. Open the Drive icon's context menu.
2. Select **Close Drive**.

## 4.1.8 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 [MS Windows](#) and [Mac OS](#).



## Preferences, MS Windows

The following settings are available.

- *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.* If this function is installed, icons in the Windows Explorer indicate the synchronisation status of folders and files.
- *Account.* An account includes: Server address, login data, server folders, local folders, storage volume. In order to synchronise multiple server folders and local folders or data on multiple servers, set up several accounts. The following functions are available.
  - *Remove account* button. Finishes the synchronisation that has been set up for this account. Deletes the account.  
**Notes:** When using this function, no data is deleted, either locally or on the server.
  - *New account* button. Launches the Drive setup wizard for creating a new account.
- *Sync Option.* Allows changing the local folder and the server folders for any account. The following functions are available.
  - *Local folder.* Shows the local folder. To use another local folder for this account, click on **Change**.
  - **Sync on** button. Indicates that an account's synchronisation is enabled. If the button is clicked, the account's synchronisation is stopped. The button changes to **Sync off**. If clicked again, the synchronisation will be resumed.
  - *Drive* Shows the server address. To use another server folder for this account, click on **Change**.
- *Notification.* Shows possible errors that occurred during the synchronisation. If you are notified about a synchronisation interruption, you can click on **Repeat**. If possible, the synchronisation will proceed.
- *Proxy.* Shows the proxy settings being used. Allows changing the proxy settings.
- *About.* Shows information about the Drive app version and the update status. The following functions are available.
  - **Diagnose mode.** Defines whether comprehensive information is written to the log file. If the diagnose mode is disabled, only shortened information is written. The log files are located in the same directory as the Drive app.
  - **Automatically install updates.** Defines whether the app is automatically updated as soon as a new version is available.

## Settings, Mac OS

The following settings are available.

- *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.* If this function is installed, icons in the Windows Explorer indicate the synchronisation status of folders and files.
- *Account.* An account includes: Server address, login data, server folders, local folders, storage volume. In order to synchronise multiple server folders and local folders or data on multiple servers, set up several accounts. The following functions are available.
  - *Edit account* button. Opens a page where you can enter the server's web address (URL), your username and your password.
  - *Unlink account* button. Finishes the synchronisation that has been set up for this account. Deletes the account.
    - Notes:** When using this function, no data is deleted, either locally or on the server.
  - *Add new account* button. Launches the Drive setup wizard for creating a new account.
- *Sync settings.* Allows changing the local folder and the server folders for any account. The following functions are available:
  - **Allow syncing files in this account** checkbox. Defines whether a synchronisation takes place for this account.
  - *Drivefolder on this Mac.* Shows the local folder. To use another local folder for this account, click on **Change folder**.
  - *Choose folders to sync on this Mac.* To use another server folder for this account, click on **Select folders**.
- *Notification.* Shows possible errors that occurred during the synchronisation. If you are notified about a synchronisation interruption, you can click on **Repeat**. If possible, the synchronisation will proceed.
- *Proxy* tab. Shows the proxy settings being used. Allows changing 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 is written to the log file. If the diagnose mode is disabled, only shortened information is written. The log files are located in the same directory as the Drive app.
  - **Automatically install updates.** Defines whether the app is automatically updated as soon as a new version is available.

## 4.2 On a Mobile Device

The following functions are available on a mobile device:

- [view](#), [search](#), [sort](#) objects
- [make objects available off-line](#)
- [create](#) new objects like folders or photos
- [organise](#) objects, e.g. move, rename, delete
- use [shares](#) to share files and folders with other users or external partners.
- use special functions for [photos or video](#)
- [customise](#) settings

### 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
- select view: grid or list
- use search terms to find objects
- sort objects by name, size or date

#### How to display objects on mobile devices

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

To only display specific objects, additional 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. This data is saved locally. This makes the data available even if you have no server connection.
- **Camera Import** only shows photos and videos that have been uploaded to the server with the function *Camera Upload*.
- **My Shares** only shows the files and folders that you shared with other persons on the server.

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 following functions is available: **List view**, **Icon view**.
- In order to sort objects, tap the menu icon on the right side. Tap on **Sort**.
- 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.

### 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. All object changes are synchronised as soon as the objects are available off-line.

**How to make individual 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 find the desired object.  
Tap the menu icon next to the object.
3. Enable the menu item **Available offline**.

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

### 4.2.3 Creating new objects

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

- create a new folder
- add an existing picture or video or a new picture

**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 new folder**
  - In order to add an existing picture or video, select **Image or video**.

### 4.2.4 Organising objects

On mobile devices you can use the following functions for organising objects.

- move, rename or delete [individual objects](#)
- move or delete [multiple objects](#)

**How to move, rename or delete individual 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 find the desired object.  
Tap the menu icon next to the object.
3. Tap a function in 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. To do so, tap the menu icon on the right side of the function bar. Tap **Multiselect**. 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.

## 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 find the desired 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. Enter the E-Mail address and a message. Tap a preset permission to customise it. To complete the procedure, tap **Update share** at the bottom.
  - To share data with read permissions, select **Get a link**.  
On the next page you can set the period of validity for the link and a password for the access.  
You can send the link and the password by E-Mail, Messenger or in a social network.

**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 find the desired object.  
Tap the share icon next to the object.  
Tap the wanted function in the menu.

## 4.2.6 Using special functions for photos or video

On a mobile device there are additional functions available for photos and videos.

- **Display** an overview of photos or videos that have been transferred to the server.
- an overview of all photos or videos that **exist** on the server.
- **Transfer** photos or videos to a screen that, depending on the mobile device, is connected to one of those devices: Chromecast, Apple TV, Fire TV.

### How to display an overview of the uploaded photos or videos:

1. In the Drive app, tap the menu icon.
2. Select **Camera import**.

**Result:** The *Camera Import* page shows an overview of all photos or videos that have been imported by the server from the mobile device's camera by using the *Camera Upload* function.

#### How to display an overview of all photos or videos:

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.  
To sort the content or to change the view, tap the menu icon on the right side of the function bar.

#### How to transfer photos or videos to another screen:

**Note:** These devices can be used:

- for iOS mobile devices: Apple TV, Fire TV
- for Android mobile devices: Chromecast, Fire TV.

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.  
Tap a photo or video in order to display it.
3. To do so, tap the menu icon on the right side of the function bar. Select **Connect to second screen**.
4. Select an available device.

## 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](#)
- [Quota](#)
- [General](#)
- [Camera import](#)
- [Battery](#)
- [Network](#)
- [Support](#)

#### Sign out

Signs you out. Stops the synchronisation.

#### Quota

Displays information about the quota limit on the groupware server.

#### General

Shows various settings and information.

- **Sync on application start.** Sets whether the synchronisation is automatically started after the app start.
- **Sync changes automatically.** Sets whether the synchronisation is automatically started after a change.
- **Limit cache size to.** Specifies the space volume that should be reserved for synchronised data.
- **Server URL.** Shows the address of the server that is used for the synchronisation.  
In order to change the address, tap **Change**.

### Camera import

Sets whether photos or videos taken with the mobile device are transferred to the server.

- **Camera import.** Enables or disables the upload.
- **Include videos.** Videos are uploaded too.
- **All photos.** Transfers all photos or videos on the mobile device and all photos or videos taken from now on.
- **Only new photos.** Limits the import to photos or videos that were taken after this function was enabled.
- **Enable background upload.** Transfers photos or videos to the server even if the Drive app is not opened.

### Battery

Specifies the battery status that must be met to allow the synchronisation to occur.

- **Sync only while charging.** Only synchronises while charging the battery.
- **Pause sync while below.** Sets whether the synchronisation pauses if the battery capacity falls below a certain level.

### Network

Determines which type of connection is to be used for synchronising.

### Support

Displays this user guide.

**Warning:** If clicking on **Reset app**, all synchronised data within the app are locally deleted. The data on the server will be kept. In order to use the data on the mobile device again, you have to re-synchronise.

## 4.3 Notes

### Changing the password

You cannot change the password in Drive. Drive uses the same password that you use for accessing the groupware.

### Name restrictions

In order to successfully synchronise files and folders, their names must not contain certain characters.

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

Depending on the development status of the software, additional files and folders might not be synchronised.

### 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 synchronised. Do not use file names that differ only as regards the upper and lower cases in your local folder.

### Do not edit the same file in more than one location

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.