Open-Xchange Server

Quick Guide for OX5 User

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Chapter 1. Comparison Open-Xchange Server 5 - Server 6

1.1. Improvements since Open-Xchange Server 5

For the user the Open-Xchange Server 6 offers the following essential improvements.

Enhanced usability due to new user interface

- Interface and user functions follow modern desktop applications.
- Intuitive and consistent user functions increase the productivity when working with the groupware. Among other things this is achieved with a clearly structured module bar and consistent function calls in all modules.
- New, standardized views like H Split and List view offer a clearly structured and standardized design of the groupware objects.
- A panel offers context-related functions in all modules. Examples: Newly create, edit, delete groupware objects.
- Many frequently used functions can be activated in a context menu with the right mouse button. Examples: answering or forwarding E-Mails, adding an E-Mail address to an address book, editing a contact.
- Alternatively, many tasks can be done by using drag & drop. Examples: moving groupware objects to other folders, changing an appointment's time and date. Appointments can also be created by double-clicking the calendar.
- You can create a new object without opening the respective module. It is possible for instance to create a new contact from within the calendar module.

Improved overview due to clear module concept

- The new **InfoStore** module replaces the modules Documents, Knowledge, Bookmarks.
- The **E-Mail** module is no longer a separate window but integrated into the start page.
- The new **Options** module replaces the former Setup window. It offers many more options and individual settings for the groupware behavior.

A large number of new functions

- The groupware's behavior and design can be individually set up. This is e. g. true for country specific settings, themes, notifications, and many more.
- The start page's design and content can be individually set up. The start page's module windows can be adjusted with drag & drop. With the help of UWA modules website information from the Internet and intranet can be displayed.
- Groupware objects can be marked with tags and flags.
- Hovers display detailed information about groupware objects i. e., there is no need to open a detail view.
- If wanted the groupware reminds you in a pop-up window about due appointments and tasks.
- For planning team appointments teams can be created and used for team views.
- Contacts, appointments, and tasks can be imported and exported in several standard formats.

1.2. New functions & functions comparison

This chapter explains essential new functions in the single modules of the Open-Xchange Server 6. It compares frequently used functions of the Open-Xchange Server 5 with the respective functions of the Open-Xchange Server 6.

The following chapters show how to use some of those functions. A complete description of the Open-Xchange Server 6 functions can be found in the user manual, in the user guide and in the online help.

Portal page (OX5) or start page (OX6)

Essential changes:

- Current information and unread E-Mails are displayed together on one page in separate module windows.
- By clicking the title of a module window the respective module is opened.
- The view can be changed by the user.
- By using UWA modules additional information can be integrated.

A description of the start page can be found in 2.1: The start page interface.

Functions comparison:

Finding information	Open-Xchange Server 5	Open-Xchange Server 6
New and current E-Mails, appointments, tasks, documents, knowledge entries, bookmarks	Portal page, **Overview** tab, **Current**	Start page, **E-Mails**, **Appointments**, **Tasks**, **InfoStore** module windows
Finding folders		
All private folders	Below **Private folders**	Below the folder with the name of the user
All system folders	Below **System folder**	Below **Public folders**
Function		
Retrieving new objects from the server	All modules except E-Mail: Activate the browser function for reloading the page. E-Mail module: Click the **Retrieve** button.	Click the **Refresh** icon in the title bar.
Opening the groupware settings page	Click the **Setup** button in the menu bar.	Click the **Settings** icon in the title bar.
Create new object	Click a function in the **New** section.	Click an icon in the **New** panel section.
Opening a module	Click an icon in the navigation bar.	Click an icon in the upper left part of the module bar .

E-Mail module

Essential changes:

- Integrated into the groupware interface, no separate window any longer
- Various views to select:
  - H Split: similar to OX Server 5
  - V Split: vertical division: the list on the left, the E-Mail contents on the right side
  - List: displays the E-Mails as a list

A description of the module interface and instructions for some typical functions can be found in 3: *E-Mail module*.

Functions comparison:

Function	Open-Xchange Server 5	Open-Xchange Server 6
Displaying the E-Mail content	Select an E-Mail from the list.	Select an E-Mail in the H Split or V Split view.
Displaying the source text of an E-Mail	Click the **Options** icon in the upper part of the detail view. Click the **Source text** entry.	Click the **Show source text** button in the **E-Mail** panel section.
Saving E-Mail attachments	Either click the disk icon, the file name or **Download** below the detail view.	Select an attachment below the detail view. Click the **Save as** button in the **Attachment** panel section. **Note:** You need to select an attachment to activate the functions in this panel section.
Composing a new E-Mail	Click the **New message** button in the menu bar.	Click the **New E-Mail** icon in the **New** panel section.
Adding an attachment to an E-Mail	When composing a new message click the **Browse** button in the **Import attachment** section. Select a file in the system window. Click the **Insert** button.	When composing a new E-Mail click the **Add** button in the **Attachment** panel section. Details can be found in 3.3.1.1: Adding attachments.
Replying to or forwarding an E-Mail	Click the respective button in the upper part of the Detail view.	Click the respective button in the **E-Mail** panel section. Another possibility is to right-click the E-Mail in a list view. Select the respective functions in the context menu.
Adding the E-Mail address to the address book as contact	Click the icon next to the E-Mail address.	Right-click the E-Mail address. From the context menu select **Add to address book**.

Calendar module

Essential changes:

- New team view:
  - A user can create teams. After the logout they will remain.
  - Clearly structured team member view
- Improved appointment reminder:
  - Via E-Mail notification and pop-up windows
  - E-Mail notification for changed appointments can be configured
- Appointment invitations need to be confirmed.
- Appointments can be described with user-defined tags and marked with flags.
- External participants can easily be added.

A description of the module interface and instructions for some typical functions can be found in 5: *Calendar module*.

Functions comparison:

Function	Open-Xchange Server 5	Open-Xchange Server 6
Selecting view	Click one of the tabs **Day**, **Work week**, **Week**, **Month**, **Team**.	Select an entry from the panel sections **View** and **Time range**.
Displaying the Detail view	Click the appointment in any view.	Click the **Detail** button in the **View** panel section.
Creating an appointment	Click the **Create appointment** icon in any view. Another possibility is to click a time in the Day view or the date in the Work week, Week or Month view.	Click the **New appointment** icon in the **New** panel section. Another possibility is to double-click the calendar window or to drag an area.
Editing an appointment	Click the **Edit appointment** icon in the detail view.	Click the **Edit** button in the **Appointment** panel section.
Adding an attachment to an appointment	Click the **Attachments** tab in the detail view. Select a file. Click **Add**.	When editing an appointment click the **Attachments** tab.
Checking the availability	When creating an appointment open the **Availability** tab	When creating an appointment open the **Availability** tab

Contacts module

Essential changes:

- Various selectable views:
  - Address cards: similar to business cards
  - Phone view: compact view as a list
  - Detail: all data of a contact
- Contacts can be described with user-defined tags and marked with flags.

A description of the module interface and instructions for some typical functions can be found in 4: *Contacts module*.

Functions comparison:

Function	Open-Xchange Server 5	Open-Xchange Server 6
Displaying details	In the contacts list click the icon in the first column.	Click the **Detail** button in the **View** panel section.
Creating, editing, moving contact	Use the respective icons below the tabs.	Activate the respective functions in the panel. Contacts can also be moved by dragging them to a folder in the folder tree (drag & drop).
Adding an attachment to a contact	Click the **Attachments** tab in the detail view. Select a file. Click **Add**.	When editing a contact click the **Attachments** tab.

Tasks module

Essential changes:

- Various selectable views:
  - List: compact view as a list
  - H Split: horizontal division: the list in the upper part, the task details in the lower part
- Improved task reminder via E-Mail notification and pop-up windows.
- Tasks can be described with user-defined tags and marked with flags.
- External participants can easily be added.

A description of the module interface and instructions for some typical functions can be found in 6: *Tasks module*.

Functions comparison:

Function	Open-Xchange Server 5	Open-Xchange Server 6
Displaying details	In the tasks list click the subject of a task.	Click the **H Split** button in the **View** panel section.
Creating, editing, moving task	Click the respective icons in the tabs.	Activate the functions in the panel. Tasks can also be moved by dragging them to a folder in the folder tree (drag & drop).
Adding an attachment to a task	Click the **Attachments** tab in the detail view. Select a file. Click **Add**.	When editing a task click the **Attachments** tab.

Documents, Knowledge, Bookmarks modules (OX 5) or InfoStore module (OX 6)

Essential changes:

- The InfoStore module comprises the functions of the modules Documents, Knowledge, Bookmarks.
- Various selectable views:
  - List: compact view as a list
  - H Split: horizontal division: the list in the upper part, the details of the InfoStore item in the lower part
- InfoStore items can be described with user-defined tags and marked with flags.

A description of the module interface and instructions for some typical functions can be found in 7: *InfoStore module*.

Functions comparison:

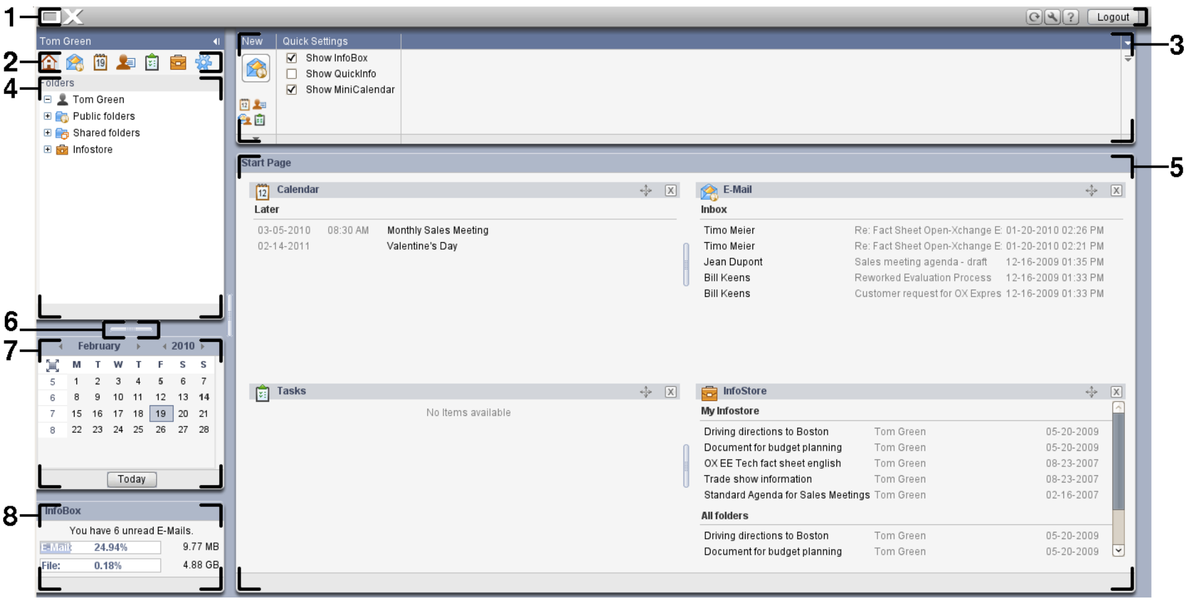
Function	Open-Xchange Server 5	Open-Xchange Server 6
Opening a module	Click any of the icons **Documents**, **Knowledge**, **Bookmarks** in the navigation bar.	Click the **InfoStore** icon in the module bar.
Showing the detail view	Browse to an entry in the **Folder tree** tab. Click the entry.	Open an InfoStore folder in the folder tree. Click an entry in the overview window.
Creating a folder	Activate a folder's option button in the folder tree. Click the **New folder** icon.	Right-click an InfoStore folder in the folder tree. Click the **New subfolder** entry in the context menu.
Creating a document	Open the **Documents** module. Activate a folder's option button in the folder tree. Click the **Create document** icon.	Open the **InfoStore** module. Select an InfoStore folder from the folder tree. Click the **New InfoStore entry** icon in the **New** panel section.
Adding an attachment to a document	When creating or editing a document upload a file in the **Load file** tab.	When creating or editing an InfoStore item upload a file with the **File** button.
Downloading current document version	Open the **Documents** module. Browse to an entry in the **Folder tree** tab. Click the icon next to the document name.	Display an InfoStore item in the **H Split** or **List** view. Click the paper clip icon next to the document name.

Chapter 2. The Start page

2.1. The start page interface

Directly after the login the start page is displayed.

2.1.1. Elements of the start page



The start page contains the following elements:

No.	Element	Function
1	Title bar	The right side of the title bar contains buttons for refreshing, accessing the settings, accessing the online help, and logging out.
2	Module bar	Contains icons for opening the modules.
3	Panel	Contains the functions that are available on the start page.
4	Folder tree	Shows the folder structure of the groupware objects.
5	Overview window	Shows module windows with current objects. Each module window has its own title bar. The display in the overview window can be configured.
6	Window separator	Allows changing the start page divisions.
7	Mini calendar	Displays the current date. Allows you to access the calendar module.
8	InfoBox	Displays information about unread E-Mail and the amount of used memory.

2.1.2. The title bar

The title bar contains the following elements:

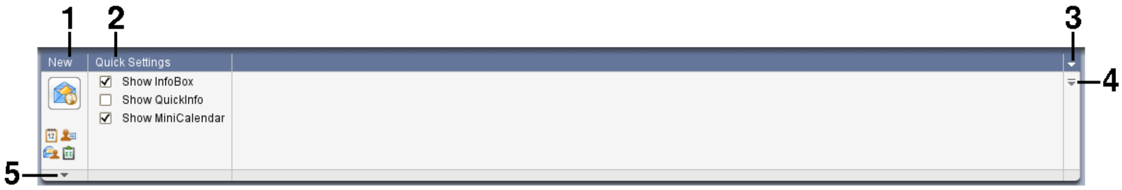
No.	Element	Function
1	**Refresh** icon	Click this button to retrieve new objects from the server. Objects are automatically refreshed in frequent intervals regardless of clicking this button. An animated icon on the button displays this process.
2	**Configuration** icon	Opens the **Options** module.
3	**Help** icon	Opens the online help, the most recent error messages, and information about the groupware version number.
4	**Logout** button	To finish working with the groupware click this button.

2.1.3. The module bar

The module bar contains the following functions:

No.	Icon	Function
1	Module icons	Switches to the respective module.
2	**Collapse** icon	Sorts the icons vertically. All elements below the module bar are no longer visible.

2.1.4. The start page panel



The start page panel contains the following functions in different panel sections:

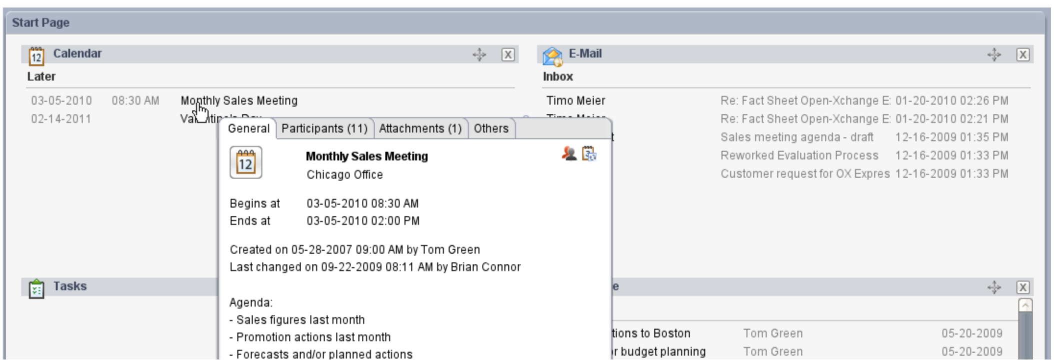
No.	Panel section, icon	Function
1	**New**	Creates new objects
2	**Quick settings**	Activates or deactivates the InfoBox, QuickInfo, or the MiniCalendar
3	**Quick settings** icon	Activates or deactivates the InfoBox, QuickInfo, or the MiniCalendar
4	**Expand** icon	Increases or decreases the panel height
5	**Further functions** icon	Expands a menu with further functions.

2.1.5. 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.

2.1.5.1. 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.

2.2. Working with the start page

2.2.1. 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 an icon in the **New** panel section. 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.

2.2.2. 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 **module 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:

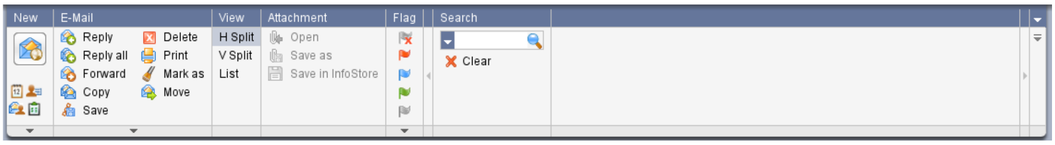
Click the **Start page** in the **module bar** icon.

Chapter 3. E-Mail module

3.1. The E-mail module interface

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

3.1.1. The E-Mail panel

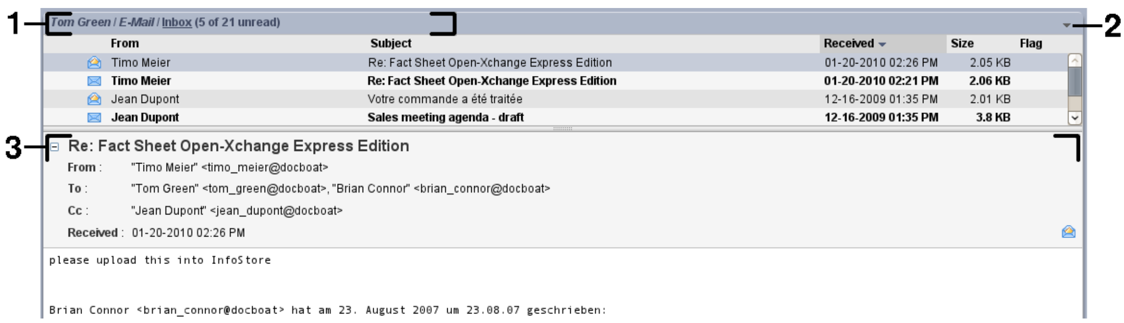


The E-Mail panel includes the following functions in different panel sections:

Panel section	Functions
New	Create new E-Mail messages or other objects
E-Mail	Reply, forward, delete, print, and manage E-Mail messages
View	Set the E-Mail view: H Split, V Split, List
Attachment	Open and save E-Mail attachments **Note:** You need to click an attachment to activate the panel section functions.
Search	Search E-Mail messages for sender, recipient, subject, or E-Mail text

3.1.2. 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	**Options** button	Opens the E-Mail settings.
3	Content area	Displays the E-Mail messages in the current E-Mail folder. Select the view in the respective **View** panel section.

3.2. 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 section 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.

3.3. Sending E-Mails

You have the following possibilities:

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

3.3.1. Sending a new E-Mail

How to send a new E-Mail:

1. In the **New** panel section click the **New E-Mail** icon. 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 receipt notification.

   Details can be found in the user guide and in the online help.
7. Click the **Send** icon 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 access the **New E-Mail** function in the **New** panel section 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.

3.3.1.1. Adding attachments

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

1. In the **Attachments** panel section click **Add**. The **Select attachments** dialog window will open.
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.

3.3.2. 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 **E-Mail** panel section click **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 the **Send** icon 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 to reply to an E-Mail.

3.3.3. Forwarding E-Mails

How to forward an E-Mail:

1. Select an E-Mail in the H Split, V Split, or List view.
2. In the **E-Mail** panel section click **Forward**. The **E-Mail** window will open.
3. Select one or more recipients.
4. Enter the E-Mail text.
5. Click the **Send** icon 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.

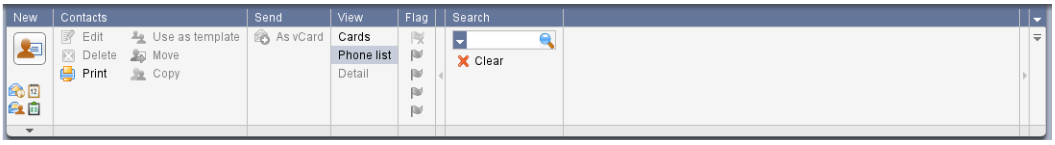
Tip: You can also use the context menu for forwarding an E-Mail.

Chapter 4. Contacts module

4.1. The Contacts module interface

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

4.1.1. The Contacts panel

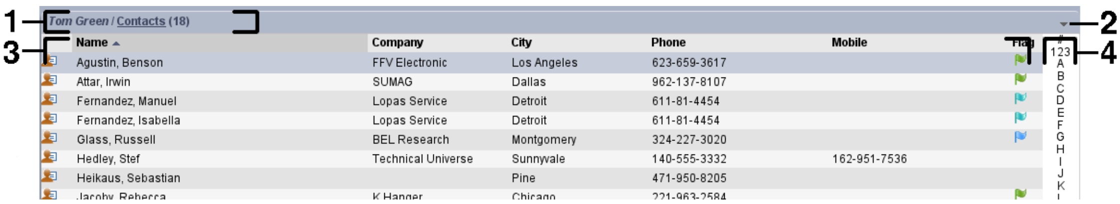


The Contacts panel contains the following functions in several panel sections:

Panel section	Functions
New	Create new contacts or other objects
Contacts	Edit, delete, print, and manage contacts
View	Set the display of contacts: address cards, phone list, and detail
Flag	Mark contacts with flags
Search	Search for contacts using the name, E-Mail, company, department, or address tags.

4.1.2. 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	**Options** button	Opens the contacts settings.
3	Content area	Displays the contacts. You can set the view with the **View** panel section and the quick filter bar.
4	Quick filter bar	Allows you to filter the displayed contacts via the first letter of the contacts' last names.

4.2. 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 section 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 section click **Details**.

4.3. Creating contacts

How to create a new contact:

1. In the **New** panel section click the **New contact** icon. The **Contact** window will open. The **Business** 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 **Business** tab.
4. Use further options if needed:

   Add tags.

   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 the **Save** icon in the panel. The window will close.

Result: The contact is created.

4.4. Managing contacts

4.4.1. 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.

The following contact data can be used as search term:

- First name, surname, displayed name
- E-Mail (business), 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. In the **Search** panel section click the small arrow on the left side to select one or several of the search criteria.

   Note: If the **Search** panel section is not displayed click the **Quick settings** icon in the upper right part of the panel. Activate the search function in the pop-up menu.
4. Enter the search term in the input field.
5. Click the **Search** icon in the **Search** panel section.

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

How to display all contacts from the current contact folder:

In the **Search** panel section click **Clear**.

4.4.2. 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 **Contacts** panel section click **Edit**. The **Contact** window will open.
3. Edit the contact's data.
4. Click the **Save** icon in the panel. The window is closed.

Result: The contact is updated.

If you do not want to accept the changes click **Cancel** in the **Window** panel section.

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.

4.4.3. Sending contacts as a vCard attachment

You can send contacts from a contact folder as E-Mail vCard attachments. In the Card or Phone list view select one or more contacts. In the **Send** panel section click on **As vCard**. The **E-Mail** window opens. A vCard is attached for each selected contact. Complete and send the E-Mail. You can also use the context menu to send contacts as vCard attachments.

Chapter 5. Calendar module

5.1. The calendar module interface

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

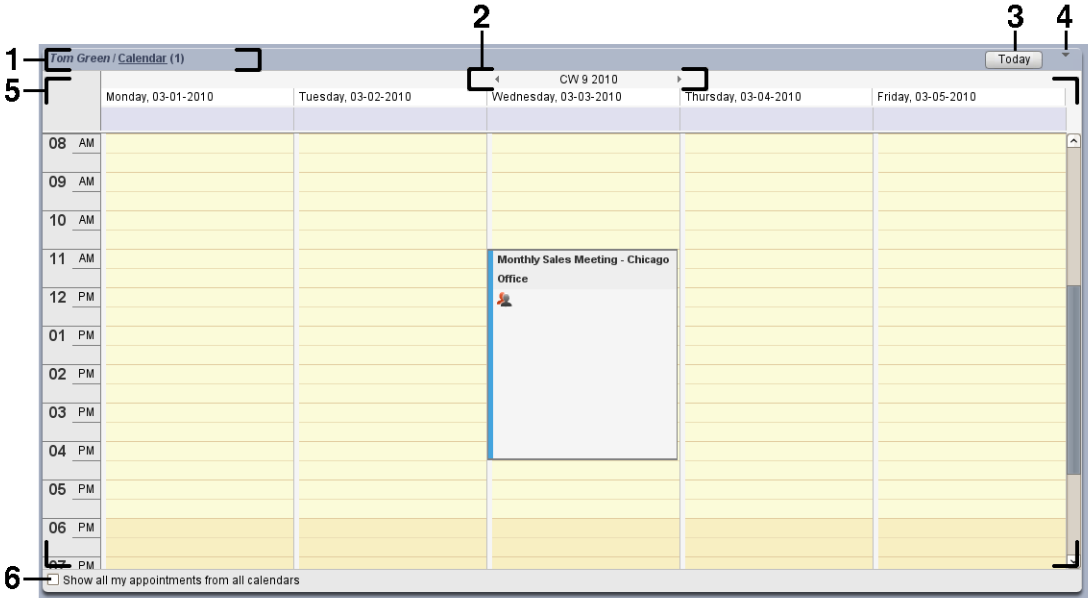
5.1.1. The calendar panel

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

Panel section	Functions
New	Create new appointments or other objects
Calendar	Edit, delete, print, and manage appointments
View	Set an appointment view: Calendar or Team, List
Time range	Set a time range for the calendar display: Day, Work week, Week, Month, or Custom
Flag	Mark appointments with flags
Search	Search for appointments using the appointment description

5.1.2. 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 this 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	**Options** button ▾	Opens the calendar settings.
5	Content area	Displays the calendar and the appointments. In the **View** and **Time range** panel sections you can choose what is displayed.
6	**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.

5.2. 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 section click **Calendar** or **List**.
3. In the **Time range** panel section select a time range.
4. To view all the details of an appointment do the following:

   Select an appointment.

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

5.3. Creating appointments

How to create a new appointment:

1. In the **New** panel section click the **New appointment** 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 tags 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 the **Save** icon in the panel. The window will close.

Result: The appointment is created.

5.4. Managing appointments

5.4.1. 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 in the team view.
2. In the **Calendar** panel section click **Edit**. The **Appointment** window opens.
3. Edit the appointment data. A comprehensive description can be found in 5.3: Creating appointments.
4. Click the **Save** icon 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.

5.4.2. Editing appointments with drag & drop

How to drag an appointment to another day:

1. Display an appointment in the calendar view Work week, Month, Week, or Custom.
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 calendar view Day, Work week, or Custom.
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.

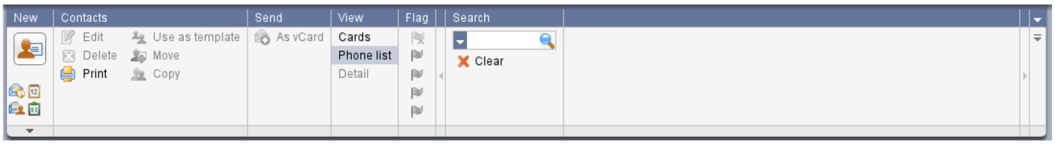
Result: The start or end of the appointment is changed.

Chapter 6. Tasks module

6.1. The tasks module interface

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

6.1.1. The tasks panel

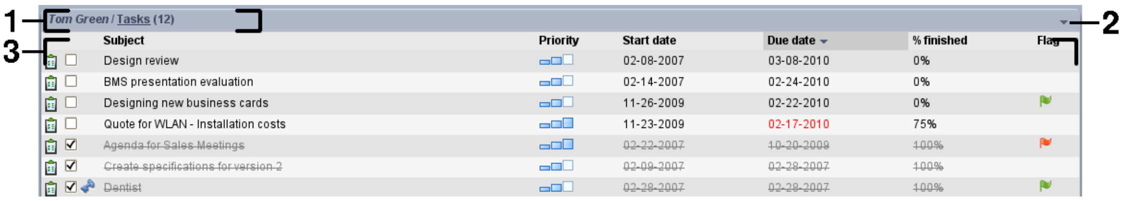


The tasks panel contains the following functions in different panel sections:

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

6.1.2. The tasks overview window

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



The tasks overview window contains the following elements:

No.	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	**Options** button	Changes to the tasks settings.
3	Content area	Displays the tasks. In the **View** panel section you can select a view.

6.2. 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 section 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.

6.3. Creating tasks

How to create new tasks:

1. In the **New** panel section click the **New task** 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 tags 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 the **Save** icon in the panel. The window is closed.

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

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

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

Chapter 7. InfoStore module

7.1. The InfoStore module interface

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

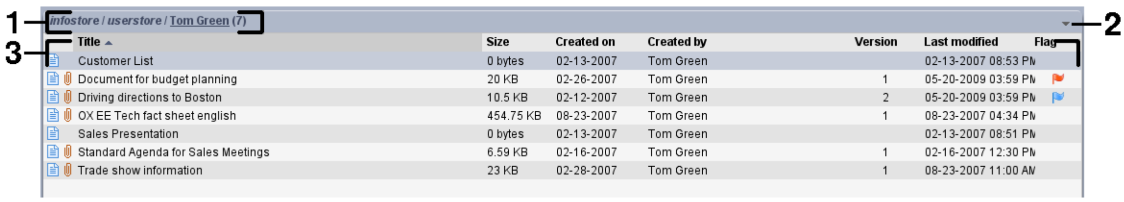
7.1.1. The InfoStore panel

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

Panel section	Functions
New	Create new InfoStore entries or other objects
Info entry	Edit, delete, print, and manage InfoStore entries
View	Set the display of InfoStore entries: H Split, List
Send	Send InfoStore entries by E-Mail
Flag	Mark InfoStore entries with flags
Search	Search for InfoStore items using a description

7.1.2. 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	**Options** button	Switches to the InfoStore settings.
3	Content area	Shows the InfoStore entries. You can set the display in the **View** panel section.

7.2. 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 section 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.

7.3. Creating an InfoStore item

How to create a new InfoStore item:

1. In the **New** panel section click the **New InfoStore item** icon. The **InfoStore item** 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 tags.

   Add comments.

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

Result: The InfoStore item is created.

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

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

7.3.1. 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 the **Save** icon 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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