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Open-Xchange Server
User Guide

Open-Xchange Server: User Guide

Published Tuesday, 09. March 2010 Version 6.16

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Chapter 1. Getting started with Groupware

1.1. What is groupware?

Groupware (group software, collaboration software) can be described with the following aspects.

Purpose of Groupware solutions

A groupware solution intends to support team work. This includes communication, co-operation, and co-ordination to achieve a goal through combined effort.

Features from the user's point of view

Typically, groupware offers the following functionality: E-Mail, appointment management, contact management, task management, and document exchange. Furthermore, there is functionality that supports the team's work. This includes resource and group management and automated information management such as appointment and task notifications.

Technical information

Groupware is a distributed system that enables users to work in common on data and documents. This is mostly accomplished through a client/server architecture. All participants (clients) are connected to the central management (server). The clients co-operate via the server.

1.2. Features and functions of Open-Xchange groupware

This chapter provides an overview of the groupware functions. It provides an initial insight into the tasks that can be accomplished using the modules, and into the collaboration of the individual modules.

Note: If some of the functionality described in this manual is missing in your groupware version, please contact your administrator or host. As this is a modularized groupware it is always possible to add additional modules or functionality by purchasing an upgrade.

Start page

The start page can be used as a stepping stone into other groupware functions. On the start page you can view objects such as new E-Mail, current appointments, tasks, and InfoStore items, as well as create new objects or open another module.

E-Mail module

The E-Mail module is used for sending and receiving E-Mail. Other functions include searching, printing, copying, or creating E-Mail templates.

E-Mail attachments can be saved to the local disk or the InfoStore. When sending an E-Mail you can access the data in the contact module without having to leave the E-Mail module. If you receive an appointment invitation via E-Mail, you can directly switch to the appointment entry in the calendar module from within the E-Mail.

Contact module

The contact module is used for managing your private and business contacts. You can view, create, and edit contacts. The contact data for all groupware users is available in the global address book.

You can use the contact data for sending E-Mail, for inviting participants to appointments from within the Calendar module, or for delegating tasks to other users from within the Tasks module.

Calendar module

In the calendar module you can manage your private and business appointments. You can view, create, and edit appointments. You can create a serial appointment for appointments that repeat frequently. For detailed information you can attach documents to an appointment. If another participant invites you to an appointment you can accept or decline the invitation.

If you invite other participants to an appointment, you can use the data from the contact module. You can check whether other participants are free for the scheduled appointment and whether resources such as rooms or devices are available. Other participants are automatically notified about appointment changes.

Tasks module

In the tasks module you can manage your private and business tasks. You can view, create, and edit tasks. For detailed information you can attach documents to the task. You can manage the task by setting the start and due date and by entering the current modification status.

You can delegate tasks to other participants. If there is a document containing the task's results, you can save the document in the InfoStore.

InfoStore module

In the InfoStore module you can manage information in the form of documents, comments, or links to addresses on the Internet. You can view, create, and modify InfoStore items. In this way the InfoStore also serves as backup location for your documents.

The InfoStore also serves as a central information pool for your company's knowledge. This requires the creation of InfoStore folders that you share with other users or other teams through read or write rights. You can send InfoStore documents as a link or E-Mail attachment to other users. You can also provide knowledge to others and benefit from their knowledge at the same time.

Options

Here you can change country specific settings, the groupware's behavior and design. This also includes personal settings like your password and a vacation notice.

You can also access the function for importing contact data and appointments in MS Outlook format or in standard formats.

Sharing folders

Sharing folders is a vital part of exchanging information with other users. Each groupware object is saved in a specific folder. Use the folder tree for managing and sharing folders.

Use your personal folders to sort your E-mail, contacts, tasks, and InfoStore items.

Support your team by sharing specific folders with read or write access. Benefit from the information of others by using objects in public or shared folders for your work.

1.3. Requirements for using the groupware

1.3.1. System requirements

In order to successfully work with the groupware, your local machine has to meet the following system requirements.

Resolution/screen size

The minimum display resolution is 1024 x 768.

Browser

Microsoft Internet Explorer 7 or later

Mozilla Firefox 2 or later

Mozilla SeaMonkey 1 or later

Apple Safari 3 or later

Google Chrome

Browser settings

Cookies must be activated

JavaScript must be activated

Pop-up windows must be allowed

1.3.2. Demands on the user

In order to work with the groupware, you need to have the same know-how and skills as for working with other modern graphical user interfaces, like Microsoft Windows.

The instructions in this document require knowledge of the following techniques:

- Using the mouse for clicking on elements
- Using the right mouse button for opening context menus
- Using drag & drop
- Multi-selection by pressing down the <ctrl> key or the <cmd> key on Mac systems
- Working with several windows
- Opening, saving, and closing files

Information on these techniques can be found, for example, in your operating system documentation.

1.4. Terminology

In order to understand this user guide, you have to be familiar with these terms.

Terminology	Definition
Groupware	The software described in this documentation.
Objects	Groupware objects like E-mail, contacts, appointments, tasks, and InfoStore items
Elements	Elements of the groupware, like windows, labels, the module bar, panel, buttons, etc.
Function	A groupware action activated by the user. Examples: sending an E-Mail, deleting an appointment
GUI	Abbreviation of Graphical User Interface. This refers to the groupware interface. The GUI consists of individual elements.
User	A person working with the groupware. Each user has a name and a password.
Internal users	All groupware users make up the internal users group.
Participant	A user invited to an appointment or task.
External participant	A person that is not a user but that participates in an appointment or task.
System windows	Dialog windows that offer certain operating system functions. Example functions are: printing, opening an E-Mail attachment, and selecting a file. Depending on the operating system on your local machine the looks of the system windows may vary.

1.5. Design elements

In favor of better legibility the text content of this guide is illustrated using the following design elements:

GUI elements

GUI elements like folder names, dialog windows, and buttons appear in bold.

Example:

Click the **New E-Mail** icon in the **New** panel section.

Key labels

Key labels are displayed in angle brackets "< >". If several keys must be pressed, the plus sign "+" is added between the single key labels.

Example:

Use **<strg>+<c>** to copy the content to the cache.

Explanatory text

Text that describes several groupware functions or possibilities is written in list form.

Example:

The following help is available in the groupware:

- Tooltips. Display labels for module bar icons or panel functions.
- QuickInfo. Explains a panel function.
- Online help. Displays the user manual in a browser window.

Step by step instructions

Instructions that include several steps for executing a specific function are displayed as a numbered list. If the instruction only consists of one step or of several alternative steps, numbering is not required. Instructions are always introduced with wording indicating the target of the instruction. Usually, at the end of the instruction the result is mentioned.

Example:

How to display the user manual in the online help:

1. Click the **Help** icon in the title bar.
2. Click on **Help** in the drop-down menu.

Result: A new browser window opens. It displays the user manual.

Tips for making the work much easier

The tips for making work easier refer to actions that you can easily follow. In some cases the tips refer to configuration possibilities connected to the current instruction.

A tip is introduced with the word **Tip:**.

Example:

Tip: You can move the horizontal separator between the upper and lower part.

Malfunction note

A malfunction note indicates actions that can not be executed in the current situation. A malfunction note helps to avoid handling errors.

A handling error is introduced with the word **Note:**.

Example:

Note: In order to add a signature, you need to have created one in the E-Mail settings.

Data loss warning

A data loss warning indicates an action that irrevocably deletes data as soon as the action was executed.

A data loss warning is introduced with the word **Warning:**.

Example:

Warning: Permanently deleted E-mail is irrevocably lost. Prior to permanently deleting E-mail, make sure you no longer need that E-mail message.

Chapter 2. The Start page

2.1. What you should know

When you have logged in to the server the groupware start page is displayed. The start page is the launch pad for working with the groupware. On the start page you can:

- view items like new E-Mail, current appointments, tasks, and InfoStore entries,
- create new items,
- open another module.

Some of the elements and functions described in this chapter are also available in other modules. Those elements and functions are:

- Module bar
- Folder tree
- Mini calendar
- InfoBox
- Help pages and tools
- Some configuration functions
- Logging out from the server

2.2. The start page interface

2.2.1. Logging in, logging out

To work with the groupware you have to log in to the server. To be able to do so you need to know the server address, your username and your password. This information is provided by your administrator or host.

How to log in to the server:

1. Open a web browser.

2. Enter the server address in the address bar. The login window will be displayed.

3. Enter your username and your password. Note that they are case-sensitive.

4. Click **OK**.

Result: The start page is displayed. A description can be found in 2.2.2: Elements of the start page.

Note: If you enter the wrong username or password an error message is displayed. Enter the correct data.

Note: In the common settings **Default module after login** you can define the module to be opened after the login.

How to log out from the server:

In the upper right part of the start page click the **Logout** button. The login window is displayed.

You can either close the browser window or log in again.

Warning: Closing a web browser tab without logging out from the server leaves you logged in to the server. If another person enters the server address, they will be automatically logged in with your name and will have full access to your groupware data.

Always log out from the server when you are finished working with the grouwpare.

Some operating systems optimize the runtime behavior of applications by keeping parts of the application and its data in memory. Under Apple Mac OS X this is indicated by a dot next to the application icon in the dock; under Windows the application icon remains in the task bar. In order to remove the browser from memory and prevent a re-login with the saved login data, close the browser by right-clicking the application icon and then clicking on **Close**.

2.2.2. Elements of the start page
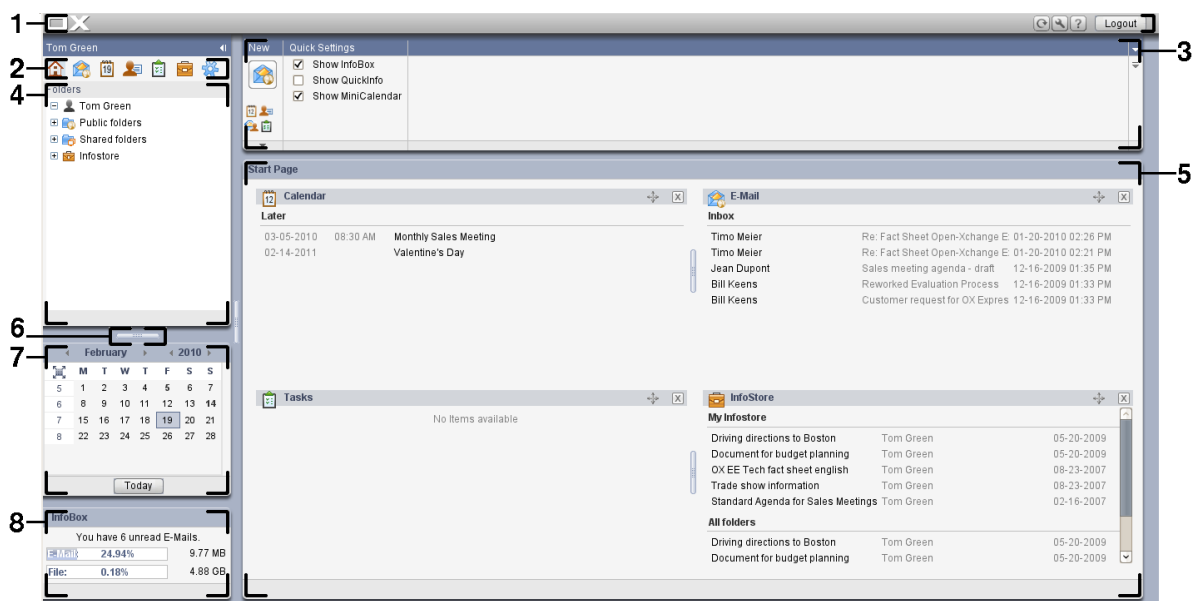
The start page contains the following elements:

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.

2.2.3. 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.

2.2.4. The module bar

The module bar contains the following functions:

No	Icon	Function
1	**Start page** icon	Switches to the start page.
	E-Mail icon	Switches to the E-Mail module.
	Calendar icon	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.
	Settings icon	Switches to the settings module.
2	**Collapse** icon	Sorts the icons one below the other. All elements below the module bar such as the folder tree, MiniCalendar, and InfoBox are no longer visible.

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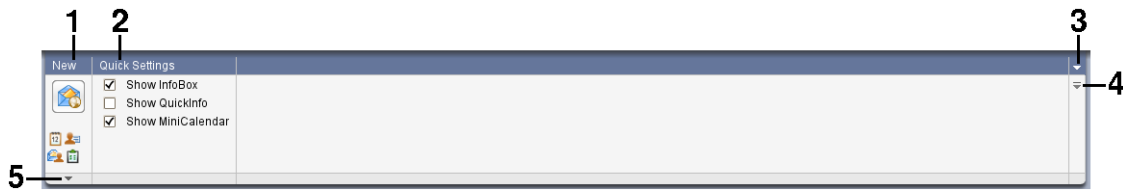
The start page panel contains the following functions in different panel sections:

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.

2.2.6. The folder tree

The folder tree shows a folder structure of the groupware objects. On the highest level it contains the following folders:

▪ **Personal root folder**. For each user there is a personal root folder. It is called after the user name. It contains the personal folders for E-Mail, contacts, appointments, and tasks. In the default setting other users can not view your personal folders.

▪ The folder **Public folders**. In this folder all users can create subfolders for saving and sharing data like contacts, appointments or tasks.

▪ The folder **Shared folders**. In this folder you can view all the personal folders shared by other users.

▪ The folder **InfoStore**. There is a personal InfoStore folder for each user. There is also a public InfoStore folder where each user can create subfolders. In an InfoStore folder you can save any documents, links to Internet addresses (bookmarks), and notes.

Information about the folder contents can be found in the description of the single modules. Information on managing and sharing folders can be found in 8.5: Folder Management and in 8.6: Permission management.

The folder tree serves the following purposes:

▪ Team work. In the folder tree you can see the data and information shared by other users with you or all users. In the folder tree you can share your data and information with other users by sharing the respective folders.

▪ Structuring. Organize your data and information by creating subfolders in your personal root folder.

▪ Access to modules. As an alternative to the module bar you can access a particular module by clicking a particular folder in the folder tree.

2.2.7. 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.

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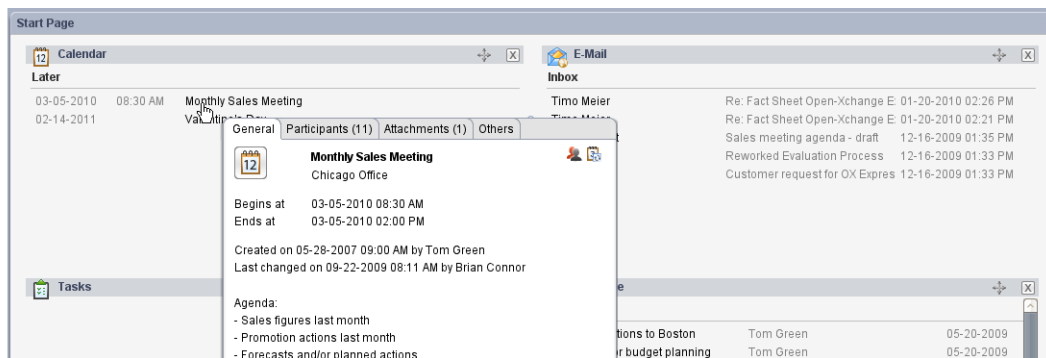
A hover shows detailed information about the object below the mouse pointer.

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.

Further information about the hover contents can be found in the descriptions of the single modules. Information about the hover configuration can be found in **Hover** configuration.

2.2.8. Mini calendar, InfoBox

The MiniCalendar displays the following information:

- The current date. The current date is framed.
- Days with appointments are displayed in bold.

Information on how to use the MiniCalendar for creating and displaying appointments can be found in 5: *Calendar module*.

The InfoBox displays the number of unread E-Mail messages and the amount of used memory.

2.3. Using the help pages and tools

The following help pages and tools are available in the groupware:

- Tooltips. Displays a description of a module bar icon or a panel function.
- QuickInfo. Provides a description of panel functions.
- Online help. Displays the user manual in a browser window.

How to display tooltips:

1. Move the mouse pointer over an icon in the module bar or over a panel function. After a short delay a description of the icon or the function is displayed as a tooltip.

2. To hide the tooltip move the mouse.

How to activate the QuickInfo:

In the **Quick Settings** panel section activate the **Show QuickInfo** checkbox.

You can also click the **Quick Settings** icon ▾ in the right side of the panel to activate **Show Quick-Info** in the menu.

Result: The panel bottom is enhanced with an area for displaying QuickInfo.

How to display QuickInfo:

1. Move the mouse pointer over an icon in the module bar or over a panel function. After a short delay a descriptive text for the icon or the panel function is displayed in the panel.

2. In order to make the text fade out, move the mouse.

How to display the user manual in the online help:

1. Click the **Help** icon in the title bar.

2. Click on **Help** in the pop-up menu.

Result: A new browser window opens. It displays the user manual.

2.4. Working with the start page

2.4.1. Finding information

The start page displays the following information:

- In the upper left part below the title bar your groupware username is displayed.

- The **Mini calendar** displays the current date. The current day is framed.

- The **InfoBox** displays the number of unread E-Mail messagesand the used memory.

- The **E-Mail** module window displays the most recent unread E-Mail messages. The sender, subject, date and time of receipt are displayed.

- The **Calendar** module window displays your current appointments. It displays appointments taking place today, in the following two days, next week or later. For each appointment the date, time, and a description is displayed.

- The **Tasks** module window displays upcoming tasks. It displays tasks taking place today, in the following two days, next week or later. For each task the subject, date, and the priority is displayed.

- The **InfoStore** module window displays the most recent InfoStore items. It displays InfoStore items from your personal InfoStore, from public InfoStore folders, and from InfoStore folders shared by other users.

2.4.2. 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.

Note: Depending on the panel height some icons might not be displayed. Information on how to change the panel height can be found in 2.4.4.1: Modifying the start page layout.

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

2.4.3. 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 **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.

2.4.4. Configuring the start page

You have the following possibilities for configuring the start page:

- Modify the start page layout
- Modify the content of the overview window

All changes are saved by default upon leaving the groupware. Information about further modifications can be found in 8.2.4: Configuring the start page.

2.4.4.1. Modifying the start page layout

How to collapse the module bar:

Click the **Collapse** ◀| icon above the module bar.

Result: The module bar icons are displayed one below the other. All elements below the module bar like folder tree, MiniCalendar, InfoBox are not longer visible. Above the module bar the **Expand** |▶ icon is displayed.

How to expand the module bar again:

Above the module bar click the **Expand** |▶ icon.

Result: The module icons are displayed next to each other again. Elements like the folder tree, MiniCalendar, and InfoBox are displayed again.

How to increase or decrease the panel height:

1. Click the **Expand** ▾ icon on the right side of the panel. The panel height is increased by one line.
2. To further increase the panel height click the **Expand** icon several times. If the maximum height of 6 lines is reached the icon form changes. The icon is now called **Collapse**.
3. To minimize the panel to the minimum height of 2 lines click the **Collapse** ▴ icon when the maximum panel height is reached.

How to show and hide the MiniCalendar:

1. In the **Quick Settings** panel section deactivate the **Show MiniCalendar** checkbox. You can also click the **Quick Settings** icon ▾ on the right side of the panel and deactivate **Show MiniCalendar** in the menu.
2. To display the MiniCalendar again activate the **Show MiniCalendar** checkbox.

How to show and hide the InfoBox:

1. In the **Quick Settings** panel section deactivate the **Show InfoBox** checkbox. You can also click the **Quick Settings** icon ▾ on the right side of the panel and deactivate **Show InfoBox** in the drop-down menu.
2. To display the InfoBox again, activate the **Show InfoBox** checkbox.

How to change the start page division:

Drag the screen separators ▭ to the wanted position.

Note: The screen separators can only be dragged in certain directions.

2.4.4.2. Customizing the content of the overview window

You can customize the module windows in the overview window:

- You can change the width of the module windows.
- You can move the module windows.

How to change the width of the module windows:

Drag the screen separators between two module windows to the left or to the right.

How to move a module window:

Use the ✛ icon to drag the module window to another location. The new layout is updated dynamically as long as you hold the left mouse button.

2.4.5. How to best use the screen interface?

To optimize the display for the groupware objects, check whether one or several of the following possibilities are suitable for you:

- Depending on the hardware, use the highest possible screen resolution. The minimum resolution is 1024*768.
- Possibly hide additional toolbars in your browser.
- If need be, use a smaller browser font. Remember to check the legibility after doing this.
- Use the horizontal, not the enhanced module bar view.
- Deactivate the QuickInfo if you do not want or no longer need them.
- If need be, decrease the panel height.
- If need be, hide the InfoBox or the MiniCalendar.
- Optimize the start page divisions by using the screen separators.
- As long as you do not need the folder tree, the MiniCalendar, and the InfoBox you can collapse the module bar.

Chapter 3. E-Mail module

3.1. Overview

Use one of the following methods to open the **E-Mail** module:

Click the **E-Mail** icon in the module bar .

Click the title bar of the **E-Mail** module window on the start page.

In the folder tree click the **Inbox** folder or any other E-Mail folder.

The **E-Mail** module:
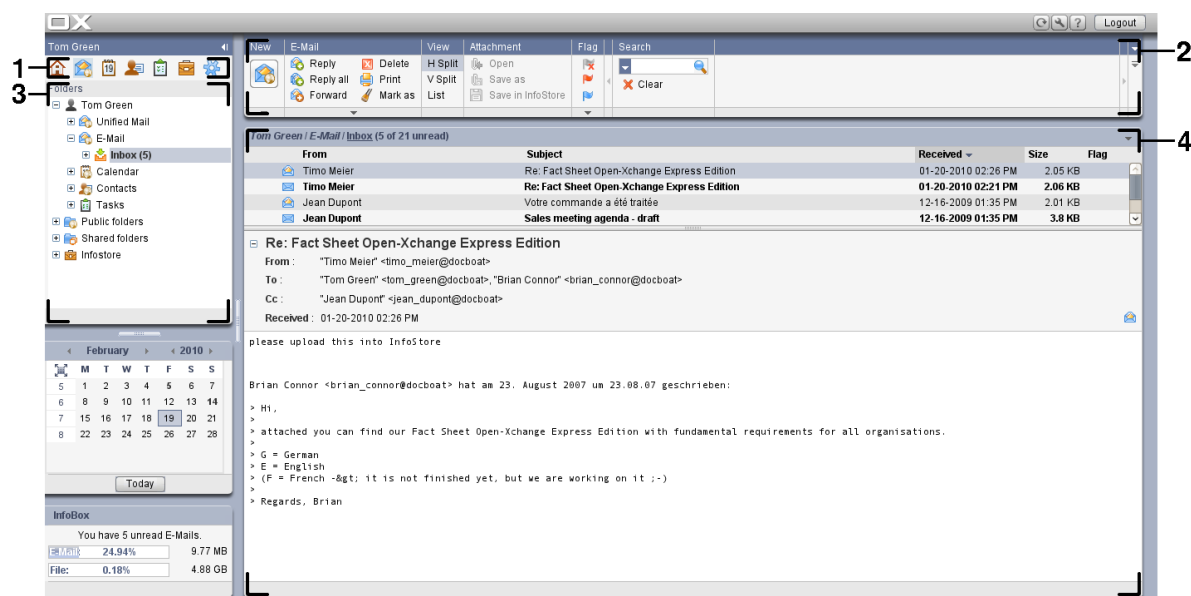
The module contains the following elements:

№	Element	Function
1	Module bar	Contains icons for opening the modules. The **E-Mail** icon is selected.
2	Panel	Contains the functions that are available in the E-Mail module, please refer to 3.3.1: The E-Mail panel.
3	Folder tree	Displays the personal E-Mail folders, please refer to 3.2.2: What is the purpose of the E-Mail folders?.
4	Overview window	Displays the content of the selected E-Mail folder, please refer to 3.3.2: The E-Mail overview window.

3.2. What you should know

3.2.1. What is the E-Mail module for?

In the **E-Mail** module you can

- display E-Mail messages,
- send E-Mail messages,
- manage E-Mail messages.

3.2.2. What is the purpose of the E-Mail folders?

E-Mail folders give a structure to E-Mail messages.

The following E-Mail folders are available by default:

- **Inbox**. By default this folder receives all incoming E-Mail messages.
- **Drafts**. Contains all E-Mail messages that you have saved as drafts.
- **Sent items**. Contains all E-Mail messages sent by you.
- **Trash**. By default contains all E-Mail messages deleted by you.

You can create additional E-Mail folders in the **Inbox** folder. You can not create subfolders in the other E-Mail folders.

Information on folder management can be found in 8.5: Folder Management. Information on sharing folders can be found in 8.6: Permission management.

If you use additional E-Mail accounts besides your Open-Xchange E-Mail you can set up further E-Mail accounts. Each E-Mail account gets a folder in the folder tree.

Information on how to set up additional E-Mail accoutns can be found in 8.2.5.3: Additional E-Mail accounts.

3.3. The E-mail module interface

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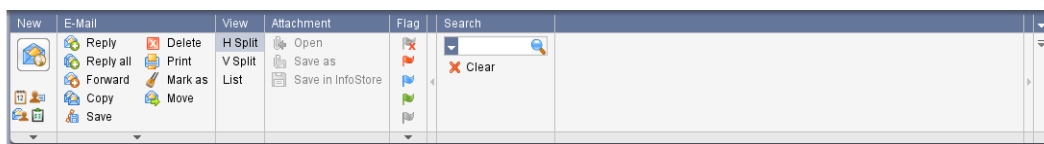
The E-Mail panel includes the following functions in different panel sections:

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.

Panel section	Functions
Search	Search E-Mail messages for sender, recipient, subject, or E-Mail text

3.3.2. The E-Mail overview window

The E-Mail overview window, **H Split** view:
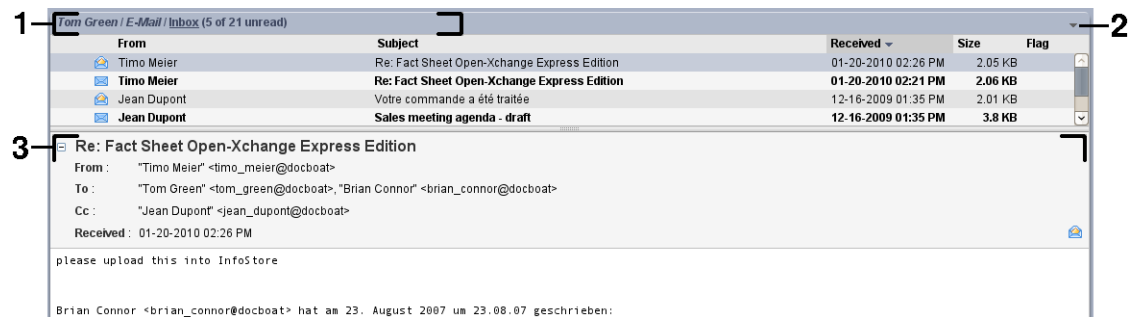
The E-Mail overview window contains the following elements:

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.

3.4. Displaying E-Mails

If you want to display E-Mail messages do the following:

- Select an E-Mail folder in the folder tree.
- Select a view in the panel. The view defines how the E-Mail messages are displayed.

When displaying E-Mail messages the following particularities serve to prevent fraud and to minimize security risks:

- If there is a suspect E-Mail that is a potential phishing mail with fraudulent content a warning is displayed in the overview window.
- If there is an E-Mail with links to external graphics, those graphics are not displayed by default. Details about this behavior can be found in 3.4.2: Displaying the H Split view.

3.4.1. Displaying the list view

The list view displays the E-Mail messages in an E-Mail folder in table.

How to display E-Mails in the list view:

1. Select an E-Mail folder in the folder tree.

2. Click **List** in the **View** panel section.

Result: The E-Mails in the current folder are displayed as a list in the overview window.

Tip: With the E-Mail option **Automatically select first E-Mail?** you can choose whether or not the first E-Mail in the list is automatically selected.

For each E-Mail the list displays a line with information in the form of icons or text:

Column	Information
Column 1, 📎 icon	The E-Mail contains at least one attachment.
Column 2, no icon	The E-Mail has not been read yet.
Column 2, ✉ icon	The E-Mail has been read.
Column 2, 🔄 icon	The E-Mail has been replied to.
From column	The sender of the E-Mail.
Subject column	The E-Mail subject.
Received column	Date and time the E-Mail was received.
Size column	The E-Mail size.
Flag column	The flag assigned to the E-Mail.

The E-Mail messages in the list are, by default, sorted in descending order using the **Received** column. The column header is highlighted. An arrow icon next to the column title indicates the sort order.

How to change the sort order:

1. To sort by a specific column click the column title.

2. To change the sort order again click the column title.

Result: The sort order changes.

3.4.2. Displaying the H Split view

In the H Split view the overview window displays the content of the selected E-Mail below the E-Mail listing.

How to display E-Mail messages in the H Split view:

1. Select an E-Mail folder in the folder tree.

2. In the **View** panel section click **H Split**.
   Result: The overview window is split horizontally. The upper part displays the E-Mail listing.

3. Select an E-Mail in the E-Mail list.

Result: The lower part of the overview window displays the following information about the selected E-Mail:

- The E-Mail header shows the subject, sender, recipient, and the date and time of receipt.
  Tip: With the **-** or **+** icon you can close or enhance the header.

- Below the header the E-mail content is displayed. Depending on the content length a vertical slider is displayed on the right side of the content.

- If the E-Mail contains attachments they are displayed below the content.

Tip: You can move the horizontal separator between the upper and lower part.

In case the E-Mail is not a plain text E-Mail but an HTML formatted E-Mail, the display depends on whether:

- displaying HTML formatted messages is allowed,

- loading externally linked graphics is allowed.

Those settings cause the following:

- If displaying HTML formatted messages is allowed while loading externally linked graphics is not allowed, the H Split view shows the following:

   - The E-Mail content is HTML formatted, but does not show any graphics.

   - Below the header the following text is displayed:
     Pre-loading of externally linked images has been blocked to protect your privacy.
     If you are sure that the E-Mail comes from a trustworthy source you can load graphics by clicking the **Load graphics** button.

- If displaying HTML formatted messages is not allowed the H Split view displays the following:

   - The E-Mail content is displayed as plain text without formatting and graphics.

   - Below the overview window you can find the complete HTML E-Mail as an E-Mail attachment. In-formation on how to open or save E-Mail attachments can be found in 3.4.6: Opening or saving E-Mail attachments.

- If displaying HTML formatted messages and loading externally linked graphics is allowed the H Split view displays the E-Mail with formatting and integrated graphics.

   Warning: You should not allow the loading of externally linked graphics as this is a security risk.

You can influence this behavior in the E-Mail settings **Allow HTML formatted E-Mail messages?** and **Block pre-loading of externally linked images?** .

3.4.3. Displaying the V Split view

In the V Split view the overview window displays the content of the selected E-Mail next to the E-Mail listing.

How to display E-Mail messages in the V Split view:

1. Select an E-Mail folder in the folder tree.

2. In the **View** panel section click **V-Split**.
   Result: The overview window is split vertically. The left pane shows the E-Mail list.**Tip:** In order to sort the list, click the ▾ icon below **Sort after**. Select a sort criterion.

3. Select an E-Mail in the E-Mail list.

Result: In the right pane of the overview window the selected E-Mail is displayed in the same way as in the H-Split view, please refer to 3.4.2: Displaying the H Split view.

Tip: You can move the vertical separator between the left and the right pane.

3.4.4. Viewing the source data

The source data contain the complete contents of an E-Mail including the complete E-Mail header details.

How to display the source data of an E-Mail:

1. Select an E-Mail in the List, H Split, or V Split view.

2. Click **Show source** in the **E-Mail** panel section.

Result: The source data are displayed in a new window. You can copy the source data to the clipboard.

Tip: In the List, H Split, or V Split view the source data can also be displayed by using the context menu.

3.4.5. Displaying hovers

Hovers are available in the H Split, V Split, and List view.

How to display an E-Mail in the hover:

1. In the List view move the mouse pointer over an E-Mail. After a short delay the hover opens. In the **General** tab the first lines of the E-Mail are displayed.

2. Define the number of lines to be displayed:

   If you want to display further lines click the E-Mail text.

   If you want to display all lines, click the E-Mail text again.

   If you want to display the original view, click the E-Mail text again.

3. If you want to display information about the E-Mail attachments click the **Attachments** tab.

4. To close the hover move the mouse pointer away from the hover or to another list entry.

The following information is displayed in the E-Mail hover:

- The **General** tab. It contains:

    - The E-Mail module icon.

    - The subject and the E-Mail sender.

    - The status icon that indicates whether an E-Mail was read and replied to.

    - The E-Mail text. Depending on the length of the E-Mail text the hover only displays the first lines.

- The **Attachments** tab. The number in brackets indicates the number of attachments. If the E-Mail contains attachments the following elements are displayed for each attachment:

    - File name, file size, and attachment type.

    - Icons for opening and saving the attachment.

3.4.6. Opening or saving E-Mail attachments

The ⫚ icon indicates that an E-Mail contains an attachment. You can do the following:

- Open the attachment.
  Note: To open an attachment you might need extra software.

- Save the attachment to your local machine.

- Save the attachment in the InfoStore.

- If the attachment ends in .vcs (vCard) you can save it as s contact. Information on how to do so can be found in 4.5.5: Creating a contact from a vCard attachment.

- If the attachment ends in .ics (iCal) you can save it as an appointment. Information on how to do so can be found in 5.5.10: Creating appointments from iCal attachments.

Note: If the attachment exceeds a particular size it will be saved in the InfoStore. The E-Mail then contains a link to the InfoStore item. Information on how to open InfoStore items can be found in 7.4.4: Opening or saving the current document version.

How to open or save an E-Mail attachment:

1. Display the E-Mail in the H Split or V Split view.

2. Select an E-Mail attachment in the content area below.

3. If you want to open the E-Mail attachment:

    In the **Attachment** panel section click **Open**. A system window will open. It will show the software used for opening the attachment.

    Use the control elements in the system window to open the attachment.

4. If you want to save the E-Mail attachment:

    In the **Attachment** panel section click **Save**. A system window will open.

    Use the control elements in the system window to save the attachment.

5. If you want to save the E-Mail attachment in the InfoStore:

    In the **Attachment** panel section click **Save in InfoStore**. The **InfoStore item** window will open. The file name of the attachment is entered as the file name for the InfoStore item.

    Information on how to create InfoStore items can be found in 7.5: Creating an InfoStore item.

Tip: You can also use the following method to open or save an E-Mail attachment:

- By double-clicking the name of the E-Mail attachment.

- By using the context menu of the E-Mail attachment.

- By using the icons in the E-Mail hover.

Tip: If an E-Mail contains multiple attachments, the attachments can all be downloaded as one zip archive. To do so select the attachments and simultaneously press the <ctrl> key or, under Mac systems, the <cmd> key.

3.5. Sending E-Mails

You have the following possibilities:

- Sending a new E-Mail

- Replying to an E-Mail

- Forwarding an E-Mail

3.5.1. Sending a new E-Mail

The following paragraphs provide an overview of how to send a new E-Mail. Details can be found on the next page.

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. Please refer to 3.5.1.1: Choose sender address

3. Select one or more recipients. Please refer to 3.5.1.2: Select a recipient

4. Enter a subject.

5. Compose the E-Mail text. Please refer to 3.5.1.3: Composing an E-Mail text and 3.5.1.4: Entering web page content

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 3.5.1.5: Using further options.

7. Click the **Send** icon in the panel. The window will close.

   Note: If you have not entered a subject the **Send** pop-up window will open. Perform one of the following actions:

   To send the E-Mail with a subject enter the subject. Click **OK**. If you do not want to enter a subject the text "(No subject)" is entered in the subject field.

   To cancel the send process click **Cancel**. The pop-up window will close.

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

If you want to cancel the action click **Cancel** in the **Window** panel section.

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.

3.5.1.1. Choose sender address

When having set up additional E-Mail accounts, you can use their addresses as sender address. Information on how to set up additional E-Mail accounts can be found in 8.2.5.3: Additional E-Mail accounts. A default sender address can be set in the **Default sender address:** E-Mail option.

How to select a sender address in the E-Mail window:

1. Activate the **From-Field** checkbox in the **View** panel section.

2. In the **From** drop-down list select the address to be used as sender address.

3.5.1.2. Select a recipient

In the **E-Mail** window you can select the following recipients:

- The E-Mail recipients

- The recipients of a copy of the E-Mail. The copy is also called "CC" which stands for "Carbon Copy". The E-Mail recipients can see the recipients in CC.

- The recipients of a blind copy of the E-Mail. The blind copy is called "BCC" which stands for "Blind Carbon Copy". Neither the E-Mail recipients nor the CC'ed recipients can see the recipients in BCC.

You have the following alternatives for selecting recipients:

- Enter the E-Mail addresses

- Select the E-Mail addresses from an address book

How to enter a recipient in the E-Mail window:

1. Enter an E-Mail address in the input field next to the **To...** button. As soon as a minimum number of characters have been entered the auto-complete function displays matching E-Mail addresses in a pop-up window. The E-Mail addresses are sorted after the frequency you use them, whereas internal users are listed first.You can select an address by clicking on it.

    Tip: You can activate or deactivate the auto-complete function in the E-Mail setting **Enable auto completion of E-Mail addresses?** .

    If you want to enter several E-Mail addresses use a comma as separator.

2. If you want to send a copy of the E-Mail to additional recipients enter the E-Mail addresses in the input field next to the **CC...** button.

    Note: To display the input field and the button activate the **CC field** checkbox in the **View** panel section.

3. If you want to send a blind copy of the E-Mail to additional recipients enter the E-Mail addresses in the input field next to the **BCC...** button.

    Note: To display the input field and the button activate the **BCC field** checkbox in the **View** panel section.

How to select a recipient from an address book from within the E-Mail window:

1. Click the **To...** button. The **Select Recipients** window opens. If the **Search all contact folders** checkbox is activated the addresses from all address books are displayed.

2. To only display the addresses from a particular address book do the following:

   Deactivate the **Search all contact folders** checkbox.

   Click the **Contact folder** button.

   Click a folder in the **Select Folder** window.

3. If you want to display a particular selection of recipients enter a character string in the input field next to **Search**. Click the **Search** button.

4. Select one or several recipients from the list.

5. Choose what the recipients should receive:

   If the recipients are to receive the E-Mail click **To->**.

   If the recipients are to receive a copy of the E-Mail click **CC->**.

   If the recipients are to receive a blind copy of the E-Mail click **BCC->**.

   The recipients are entered in the input fields next to the buttons **To**, **CC**, or **BCC**.

6. If requested you can change the selection of recipients:

   If you want to remove a recipient delete the respective address from the input fields.

   If you want to remove all recipients click **Clear**.

7. To accept the selection click **OK**. If you do not want to accept the selection click **Cancel**.

3.5.1.3. Composing an E-Mail text

How to compose the E-Mail text in the E-Mail window:

1. Enter the E-Mail text below the formatting bar.

2. If you want to format the text use the formatting bar:

   Select individual text parts.

   Format the selected text parts by clicking the respective elements in the formatting bar.

   Note: The formatting bar is only displayed if HTML formatting is set in the E-Mail options, please refer to 8.2.5.1: Compose tab.

3. You can use the spellchecker:

   If a word is underlined in red, right-click the word.

   In the context menu select one of the proposed corrections or add the word to the user dictionary.

   Note: The spellchecker can only be used if HTML formatting is activated in the E-Mail settings, please refer to 8.2.5.1: Compose tab. The spellchecker functions are not provided by Open-Xchange but by the HTML editor. Information on the HTML editor used can be found at http://tinymce.moxiecode.com.

4. If you want to add a signature select one in the **Signature** selection field.

Note: Prior to being able to add a signature you have to create one in the E-Mail settings. Further information can be found in 8.2.5.2: E-Mail signatures.

3.5.1.4. Entering web page content

You can enter the contents of a web page as E-Mail text.

How to enter the contents of a web page in the E-Mail window:

---

1. Use **<ctrl>+<a>** to select the complete web page content.

2. Use **<ctrl>+<c>** to copy the content to the clipboard.

3. Move the cursor to the wanted position and then use **<ctrl>+<v>** to paste the contents in the **E-Mail** window.

Note: On Mac systems use the **<cmd>** key instead of **<ctrl>**. Depending on the web page structure some formatting might not be included.

3.5.1.5. Using further options

There are some other options you can use:

- Add any file as an attachment

- Add your contact data from the address book as a VCard

- Enter another sender address as a standard address

- Set the priority of the E-Mail

- Request a receipt confirmation

How to use further options in the E-Mail window:

1. To display all options activate the **Options** checkbox in the **View** panel section.

2. If you want to add attachments to the E-Mail click **Add** in the **Attachments** panel section. Details can be found in 3.5.1.6: Adding attachments.

3. If you want to add a VCard with your contact data from the address book activate the **Attach VCard** checkbox. The VCard is attached to the E-Mail as a .vcf file.

4. If you do not want to enter your default sender address select another sender address in the **From:** selection field. Details on selecting sender addresses can be found in the E-Mail settings **Default sender address:** . If you have any questions about your sender addresses please contact your administrator or host.

5. If you want to set the priority of an E-Mail use the **Priority**selection box:

    If you select **Low** the E-Mail sent to the recipient is marked as being less important.

    If you select **High** the E-Mail sent to the recipient is marked as being important.

6. If you want to request a receipt confirmation from the recipient activate the **Delivery receipt** checkbox.
   Note: Despite this request the recipient can suppress a delivery receipt.

3.5.1.6. Adding attachments

Note: Please note that for many E-Mail accounts there is a file size limit for E-Mail attachments. This limit should not be exceeded.

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.

3.5.2. Replying to E-Mails

When replying to an E-Mail the following input fields are pre-filled in the **E-Mail** window:

- The sender of the E-Mail and further recipients of the E-Mail are automatically entered as recipients of the reply E-Mail. In the E-Mail settings **When "Reply all":** you can select whether further recipients are entered in the "To" or in the "Cc" fields.

- The E-Mail subject is entered in the subject field of the reply E-Mail. The subject is preceded with the text "Re:".

- The E-Mail text is cited in the reply E-Mail. Each line is preceded with the character ">" to indicate that it is a quotation.

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. If needed you can use all the functions described in 3.5.1.3: Composing an 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.

If you do not want to send the E-Mail click **Cancel** in the **Window** panel section.

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

3.5.3. Forwarding E-Mails

If you forward an E-Mail, the following input fields are pre-filled in the **E-Mail** window:

- The subject of the E-Mail is entered as the subject of the forwarded E-Mail. The subject of the forwarded E-Mail is preceded with "Fwd: ".

- The E-Mail text is entered in the forwarded E-Mail. The text is preceded with the following details:

    The header "Original message"

    Sender, recipient, date, and subject of the original message

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. Details can be found in 3.5.1.2: Select a recipient.

4. Enter the E-Mail text. If needed you can use all the functions described in 3.5.1.3: Composing an 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.

If you do not want to send the E-Mail click **Cancel** in the **Window** panel section.

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

3.6. Managing E-Mail messages

3.6.1. Searching E-Mail messages

With the respective search term you can find E-Mail messages in the current E-Mail folder. The search term defines the character string to be searched for. The search criteria defines the E-Mail parts to be searched for the search term.

The following E-Mail parts can be used as search criteria:

- Sender
- Recipient
- Recipient of a CC copy
- Subject
- E-Mail text

Example: To find the E-Mail messages with the senders "Meier", "Meyer", "Obermeier", use "Sender" as the search criteria and "me" as the search term.

How to search for an E-Mail:

1. In the folder tree select the E-Mail folder to search.

2. Select the H Split, V Split, or List view.

3. In the **Search** panel section click the small arrow on the left side to select one of the search criteria **From**, **To**, **CC**, **Subject**, or **E-Mail text**.

   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. In the **Search** panel section click the **Search** icon🔍 .

Result: The list view only displays the E-Mail messages matching the search term.

How to display all E-Mail messages in the current E-Mail folder:

Click **Clear** in the **Search** panel section.

3.6.2. Collecting E-Mail addresses

You can collect E-Mail addresses by adding addresses to an address book. The following possibilities exist:

- New E-Mail addresses can be automatically collected while sending or reading E-Mails.

- You can manually add E-Mail addresses to an address book.

How to automatically collect new E-Mail addresses when sending an E-Mail:

In the E-Mail settings activate   **Automatically collect contacts while sending E-Mails?** .

Result: New E-Mail addresses are automatically saved as contacts in the **Collected contacts** folder when sending an E-Mail with recipients that are not contained in an address book.

How to automatically collect new E-Mail addresses when reading an E-Mail:

In the E-Mail settings activate   **Automatically collect contacts while reading E-Mails?** .

Result: New E-Mail addresses are automatically saved as contacts in the **Collected contacts** folder when reading an E-Mail from a sender that is not contained in an address book.

Tip: You can move those contacts from the **Collected addresses** folder to other contact folders. Details can be found in 4.7.6: Moving contacts.

How to manually add an E-Mail address to an address book:

1. Select an E-Mail in the H Split or V Split view.

2. Drag the E-Mail address in the E-Mail header next to **From:** or **To:** to a contact folder in the folder tree. An icon next to the mouse pointer gives the following hints:

    When dragging to a valid target a green tick is displayed.

    When dragging to an invalid target a red prohibited icon is displayed.

3. Release the mouse button on the target folder.

Result: The **Contact** window opens. The E-Mail address is entered as business E-Mail address. Further information about the **Contact** window can be found in 4.5: Creating contacts

Tip: You can also use the context menu to add the E-Mail address to the address book. To do so right-click on an E-Mail address in the E-Mail header.

3.6.3. Printing E-Mail messages

There are the following possibilities for printing E-Mail messages:

- Printing an E-Mail list
- Printing an E-Mail's content

How to print an E-Mail list:

1. Select several E-Mails in the H Split, V Split, or List view.

Tip: To find particular E-Mail messages use the Search and Sort functions prior to selecting the E-Mails.

2. In the **E-Mail** panel section click **Print**. A new window with the print preview and the **Print** system window will open.

3. If needed change the printer settings in the **Print** system window.

4. In the **Print** system window click **Print**.

Result: The E-Mail list is printed.

How to print the content of 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 **Print**. A new window with the print preview and the **Print** system window will open.

3. If needed change the printer settings in the system window.

4. In the system window click **Print**.

Result: The E-Mail content is printed.

Tip: You can also use the context menu to print E-Mail messages.

3.6.4. Saving E-Mails

You can save an E-Mail as text file to your disk.

How to save an E-Mail:

1. Select an E-Mail in the H Split, V Split or List view.

2. In the context menu click on **Save**.

3. Depending on the browser you might be asked whether you want to open or save the file. Select **Save**.

4. Select a location. Enter a file name.

5. Click on **Save**.

Result: The E-Mail is saved as text file with the ending .eml.

3.6.5. Working with E-Mail drafts

When composing an E-Mail you can save it as a draft. The draft can later be edited or sent.

How to create an E-Mail draft:

1. In the **New** panel section click **New E-Mail**. The **E-Mail** window opens.

2. Enter the data to be used as a draft.

3. In the **E-Mail** panel section click **Save draft**.

Result: The window will close. The E-Mail is saved in the **Drafts** folder.

How to send an E-Mail draft:

1. Select the **Drafts** E-Mail folder.

2. Select a draft in the H Split, V Split, or List view.

3. In the **E-Mail** panel section click **Edit draft**. The **E-Mail** window opens.

4. If needed complete the content.

5. In the **E-Mail** panel section click **Send**.

Result: The E-Mail is sent. The draft is kept.

3.6.6. Copying E-Mail messages

You can copy E-Mail messages from one folder to another.

How to copy E-Mail messages:

1. Select one or several E-Mail messages in the H Split, V Split, or List view.

2. In the **E-Mail** panel section click **Copy**. The **Select folder** window will open.

3. In the **Select folder** window click an E-Mail folder. You can only click folders you can copy E-Mail messages to.

Result: The E-Mail messages are copied.

Tip: You can also use the context menu to copy E-Mail messages.

3.6.7. Moving E-Mail messages

There are the following possibilities for moving E-Mail messages:

- With the panel function
- With drag & drop

How to move E-Mail messages with the panel function:

1. Select one or several E-Mails in the H Split, V Split, or List view.

2. In the **E-Mail** panel section click **Move**. The **Select folder** window opens.

3. In the **Select folder** window click an E-Mail folder. You can only click folders you can move E-Mail messages to.

Result: The E-Mails are moved.

Tip: You can also use the context menu to move E-Mail messages.

How to move E-Mail messages with drag & drop:

1. Select one or several E-Mail messages in the H Split, V Split, or List view.

2. Drag a selected E-Mail to an E-Mail folder. An icon next to the mouse pointer gives the following hints:

    When dragging to a valid target a green tick is displayed.

    When dragging to an invalid target a red prohibited icon is displayed.

3. Release the mouse button on the target folder.

Result: The E-Mail messages are moved.

3.6.8. Changing the E-Mail status

An E-Mail status indicates whether an E-Mail is marked as read, answered, or deleted. The status of an E-Mail is set automatically. You can change the status by e.g.: marking unread E-Mail messages as read.

How to change the status of an E-Mail:

1. Select one or more E-Mail messages in the H split, V split or list view.

2. In the **E-Mail** panel section click on the **Mark as**.

3. Click on a status.

Result: The status of the E-Mail is changed.

Tip: You can also use the context menu to change the E-Mail status.

3.6.9. Deleting E-Mail messages

The following possibilities exist:

- Delete E-Mail messages. By default the E-Mails are moved to the Trash folder.
- Recover deleted E-Mail messages from the Trash.
- Permanently delete E-Mail messages from the trash. Permanently deleted E-Mail messages can not be recovered.

Warning: If you set the E-Mail settings option **Permanently remove deleted E-Mails?** to **Yes** you will not be able to recover deleted E-Mail messages. It is recommended that you not use this setting.

How to delete one or several E-Mail messages:

1. Select one or several E-Mail messages in the H Split, V Split, or List view.

2. In the **E-Mail** panel section click **Delete**.

Result: The E-Mail messages are moved to the Trash.

Tip: You can also delete E-Mail messages by using the context menu or the **<del>** key.

How to recover deleted E-Mail messages:

1. Select the Trash from the folder tree. The E-Mail messages in the Trash are displayed in the overview window.

2. Select the H Split, V Split, or List view.

3. Drag one or several E-Mail messages from the List view in the overview window to the **Inbox** folder or to any other E-Mail folder in the folder tree .

Result: The deleted E-Mail messages are recovered.

How to permanently delete one or several E-Mail messages:

Warning: Permanently deleted E-Mail messages are lost for ever. Prior to permanently deleting E-Mail messages make sure you no longer need those E-Mail messages.

1. Select the Trash in the folder tree. The E-Mail messages in the Trash are displayed in the overview window.

2. Select one or several E-Mail messages in the H Split, V Split, or List view.

3. In the **E-Mail** panel section click **Delete**. The **Delete E-Mails** dialog window opens.

4. Choose an action:

To permanently delete the E-Mail messages click **Yes**.

Otherwise click **No**.

Chapter 4. Contacts module

4.1. Overview

To open the **Contacts** module use one of the following methods:

Click the **Contacts** icon in the module bar 🏠 🔵 🔲 👤 📷 📧 ❄ .

Click the **Contacts** folder or another contact folder in the folder tree.

The **Contacts** module:
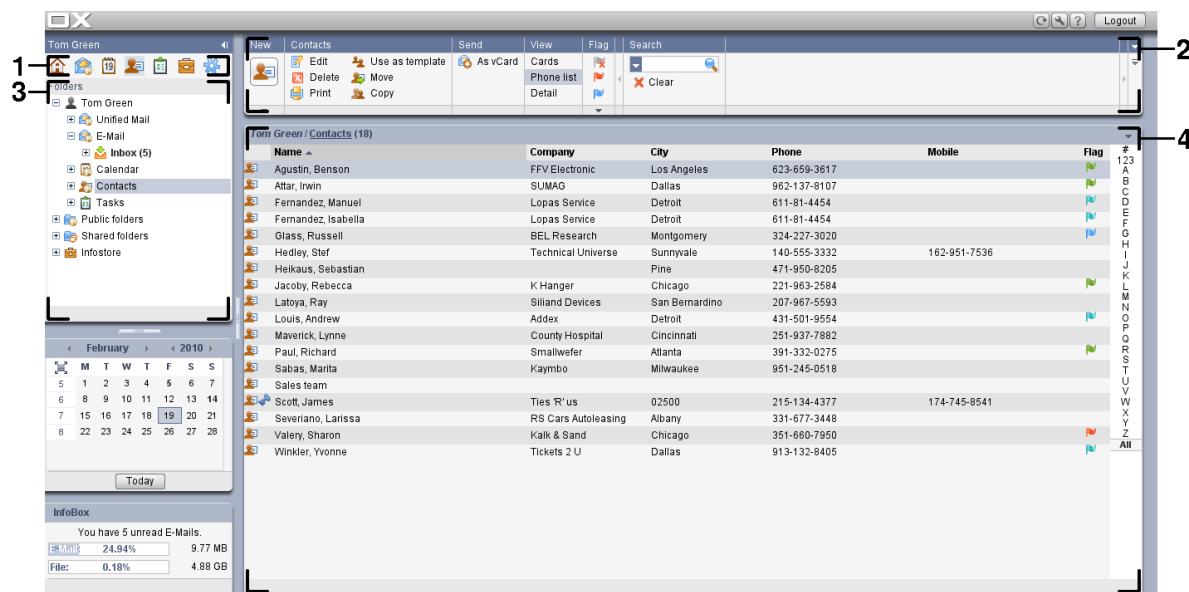
The module contains the following elements:

No.	Element	Function
1	Module bar	Contains icons for opening the modules. The **Contacts** icon 👤 is selected.
2	Panel	Contains the functions available in the Contacts module, please refer to 4.3.1: The Contacts panel.
3	Folder trees	Displays the personal contact folders, please refer to 4.2.3: What is the purpose of the contact folders?.
4	Overview window	Displays the content of the selected contacts folder, please refer to 4.3.2: The contacts overview window.

4.2. What you should know

4.2.1. What is the purpose of the Contacts module?

In the **Contacts** module you can

- display contacts,
- create contacts,
- manage contacts,
- combine contacts into distribution lists.

4.2.2. What should I know about contacts?

To appropriately work with contacts you should know the different types of contacts.

There are the following types of contacts:

Contact type	Characteristics
Default contact	A contact with no special characteristics.
Private contact	A contact that can only be viewed by the creator of the contact. Example: The contact data of a private acquaintance or family member.
Distribution list	A list that contains the contact data of several contacts. The distribution list makes it possible to send an E-Mail to several contacts simultaneously. Example: a distribution list with all team members.
Public contacts	A contact in a public contact folder. The administrator can create public contacts. Example: all members of your organisation.
Shared contact	A contact in a shared contact folder. Each user can share their own contact folders with other users. Example: You share your contact folder containing your business contacts with your team.

If you create a contact you can select a contact type. When displaying contacts the contact types are indicated by icons.

You can combine particular contact types with each other. You can, for example, create a distribution list with private contacts only.

The descriptions and instructions in the following chapters refer to contacts as well as distribution lists, even if the text mentions contacts only. If there are differences between contacts and distribution lists it will be explicitly mentioned in the text.

4.2.3. What is the purpose of the contact folders?

Contact folders allow you to structure contacts. Each contact folder in the folder tree represents a collection of contacts. Select a collection of contacts by clicking a contact folder in the folder tree.

You can recognize a contact folder in the folder tree by this icon: 👤.

There are the following types of contact folders:

- Personal contact folders. These contact folders can be found in the folder tree below your root folder. The personal default contact folder is called **Contacts**. You can create additional personal contact folders.

- Public contact folders. These contact folders can be found in the folder tree below the folder **Public folders**. Each user can create public contact folders. By default public folders are visible to all users.

- Shared contact folders. These contact folders can be found in the folder tree below the folder **Shared folders**. A user can share personal contact folders with other users.

Information on folder management can be found in 8.5: Folder Management, and on sharing folders can be found in 8.6: Permission management.

4.3. The Contacts module interface

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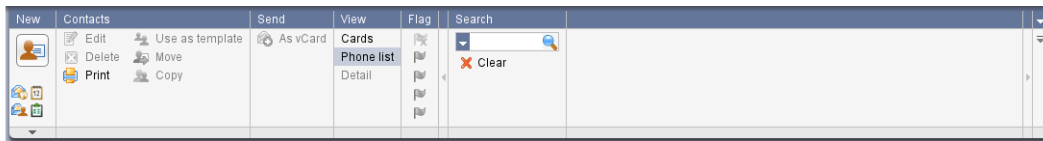
The Contacts panel contains the following functions in several panel sections:

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.

4.3.2. The contacts overview window

The contacts overview window, **Phone list** view:
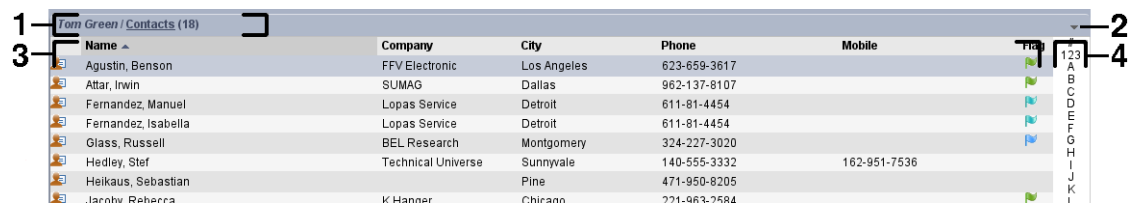
The contacts overview window contains the following elements:

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.

4.4. Viewing contacts

To display contacts you have to do the following:

- Select a contact folder in the folder tree.

- Select a view in the panel. The view defines how the contacts are displayed.

- If need be, filter the view by using the quick filter bar.

4.4.1. Displaying the phone list

The phone list displays the contact in the form of a table.

How to display contacts as phone list:

1. Select a contact folder in the folder tree.

2. In the **View** panel section click **Phone list**.

3. To filter the view, use the quick filter bar. Details can be found in 4.4.3: Filtering contacts.

Result: The phone list for the contacts is displayed.

For each contact the list displays one line with information in the form of icons or text:

Column	Information
Column 1, icon	The entry is a contact
Column 1, icon	The entry is a distribution list
Column 2, icon	The entry is a private contact
Name column	Name of the contact or of the distribution list
Company column	The contact's company
City column	Location of the company
Phone column	Phone (business)
Mobile column	Mobile (business)
Flag column	Flag that was assigned to the contact.

The phone list contacts are, by default, sorted in ascending order after the **Name** column. The column header is highlighted. An arrow icon next to the column header indicates the sort order.

How to change the sort order:

1. To sort according to a column, click the column header.

2. To change the sort order, click the column header again.

Result: The sort order is changed.

Note: The first two columns can not be used for sorting.

4.4.2. Displaying address cards

When selecting the Card view the contacts in the current contact folder are displayed in the content area in an address card form.

How to display contacts as address cards:

1. Select a contact folder in the folder tree.

2. In the **View** panel section click **Address cards**.

3. To filter the view use the quick filter bar. Details can be found in 4.4.3: Filtering contacts.

Result: The address cards for the contacts are displayed.

The address cards display the following information for the contacts:

- Contact icon
- First name and surname
- Assigned flag
- If need be, private contact icon
- Business address, business phone number, and business E-Mail address

The address cards display the following information for distribution lists:

- Distribution list icon
- Distribution list name
- Assigned flag

4.4.3. Filtering contacts

With the quick filter bar you can filter contacts so that only contacts beginning with a particular character are displayed.

How to filter contacts:

1. In the panel select the Cards or the Phone list view.

2. Click an entry in the quick filter bar:

To only view the contacts beginning with a particular letter click that letter.

To only view the contacts beginning with a special character click **#**.

To only view the contacts beginning with a figure click **123**.

Result: The Contacts view is filtered.

To return to the all contacts display click **All** in the quick filter bar.

4.4.4. Displaying the Detail view

The detail view displays all information for a contact.

How to display a contact in the Detail view:

1. Select a contact folder in the folder tree.

2. Select a contact in the Cards or Phone list view.

3. In the **View** panel section click **Detail**.

Result: The Detail view for the contact is displayed.

The Detail view for a contact displays the following information:

- The window title contains the contact's display name. By default the display name consists of the first name and the surname.

- The **Overview** tab contains the following data:

  - All names for the contact

  - Details about the company or organisation

  - Business and private phone numbers

  - Business and private addresses

  - Comments, tags, and optional fields

- The **Attachments** tab contains the list of attachments.

Tip: Next to the description of some entries the ▾ icon is displayed. If you click this icon, additional information is displayed.

The Detail view for a distribution list displays the following information:

- The window title contains the name of the distribution list.

- The **Overview** tab contains the following information:

  - All names of the contacts belonging to the distribution list

  - The E-Mail addresses of the contacts

4.4.5. Displaying hovers

Hovers are available in the Cards and Phone list view.

How to display a contact in the hover:

1. Move the mouse pointer over a contact. After a short delay the hover will open. It displays the **Overview** tab.

2. To see further information click another tab.

3. To close the hover move the mouse pointer out of the hover.

Result: The contact hover displays the following information:

- The **General** tab. It contains:
    - The picture for the contact.
    - First name and surname of the contact.
    - The private contact icon.
    - The flag assigned to the contact.
    - All phone and fax numbers for the contact.
    - The E-Mail address for the contact. When clicking an E-Mail address the window for composing an E-Mail will open.

- The **Addresses** tab. It contains:
    - The business address for the contact.
    - The private address for the contact.

- The **Attachments** tab. The numbers in brackets indicate the number of attachments. If the contact includes attachments the following elements are displayed for each attachment:
    - The attachment's file name, file size, and type.
    - Icons for opening and saving the attachment.

The hover for a distribution list displays the following information:

- The **General** tab. It contains:
    - The distribution list icon.
    - The name of the distribution list.
    - An icon for sending an E-Mail to all members of the distribution list.
    - The flag assigned to the distribution list.
    - All E-Mail addresses of the distribution list.

- The **Additional** tab. It contains:
    - The surnames and first names of the distribution list members.
    - The E-Mail addresses of the distribution list members. When clicking an E-Mail address the window for composing an E-Mail will open.

- The **Attachments** tab. The numbers in brackets indicate the number of attachments. If the distribution list contains attachments, the following elements are displayed for each attachment:
    - The attachment's file name, file size, and type.
    - Icons for opening and saving the attachment.

4.4.6. Opening or saving attachments

You can do the following:

▪ Open attachment.
Note: To open an attachment you might need additional software.

▪ Save the attachment outside the groupware.

▪ Save the attachment in the InfoStore.

How to open or save a contact's attachment:

1. Display the contact in the Detail view.

2. Select the **Attachments** tab.

3. Select the attachment.

4. If you want to open the attachment:

    In the **Attachment** panel section click **Open**. A system window will open. It shows the software used for opening the attachment.

    Use the system window's control elements for opening the attachment.

5. If you want to save the attachment:

    In the **Attachment** panel section click **Save**. A system window will open.

    Use the system window's control elements for saving the attachment.

6. If you want to save the attachment in the InfoStore:

    In the **Attachment** panel section click **Save in InfoStore**. The **InfoStore Item** window will open. The attachment's file name is entered as the file name for the InfoStore item.

    Information on how to create InfoStore items can be found in 7.5: Creating an InfoStore item.

Tip: You can also open or save an attachment by using the respective icons in the contact's hover.

4.5. Creating contacts

This section provides an overview of how to create a new contact. Details can be found on the next page.

Note: If you want to create a new contact in a public or shared contact folder you need to have the folder permission for creating objects.

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. See 4.5.1: Adding tags

   If required mark the contact as private. See 4.5.2: Marking a 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. Please refer to 4.5.3: Adding a picture.

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

   Add attachments. See 4.5.4: Adding attachments

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

Result: The contact is created.

If you want to cancel the process click **Cancel** in the **Window** panel section.

There are the following possibilities for creating a contact:

You can also call the **New contact** function from within other modules in the **New** panel section.

In the Cards or Phone list view double-click a free area in the overview window. The **Contacts** window will open.

In the E-Mail window H split or V Split view drag an E-Mail address to a contact folder in the folder tree. The **Contact** window will open. The E-Mail address is entered as a business E-Mail address.

4.5.1. Adding tags

A tag is text that can be used as criteria for structuring contacts. There are two possibilities for adding tags:

- Enter tags in the input field next to the Tags button.

- Select tags from a list of pre-defined tags.

How to add pre-defined tags in the Contact window:

1. Select the **Business** tab.

2. Click the **Tags** button.

3. In the **Select tags** dialog window select one or several tags. Click **OK**.

Result: The tags are entered in the input field.

Note: Prior to being able to select tags from a list, you have to define the tags in the groupware settings. Further information can be found in 8.2.3: Tags.

Tip: To delete a tag edit the input field.

4.5.2. Marking a contact as private

A private contact is a contact that can not be viewed by other participants, when sharing your contact folders with other participants.

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

How to mark a contact as private in the Contact window:

1. Select the **Business** tab.

2. Activate the **Private contact** checkbox.

4.5.3. Adding a picture

A picture for a contact should have the following properties:

- Maximum file size: 32,8 kb

- Recommended size: 76 x 76 px

- File format: .JPG, .BMP, .GIF or .PNG

How to add a picture in the Contact window:

1. Select the **Private** tab.

2. In the **Picture** panel section click **Add**. The **Upload picture** window is displayed.

3. In the **Upload picture** window click **Browse**. Select the file to be added as a picture. Close the file selection dialog window.

4. In the **Upload picture** window click **OK**.

Note: The picture is not immediately displayed. It will be displayed the next time the contact is opened.

4.5.4. Adding attachments

How to add attachments in the Contact window:

1. Select the **Attachments** tab.

2. In the **Attachment** panel section click **Add attachment**. The **Select attachments** dialog window will open.

3. In the **Select attachments** dialog window click **Browse**. Select the file to be added as an attachment. Close the file selection dialog window.

4. In the **Select attachments** dialog window click **Add**. The file is entered in the list field.

5. To add additional attachments repeat steps 3 – 4.

6. If you want to remove an attachment select it in the list field. Then click **Remove**.

7. In the **Select attachments** dialog window click **OK**.

Result: The attachments are added to the contact.

4.5.5. Creating a contact from a vCard attachment

You can create a contact from an E-Mail's vCard attachment. A vCard attachment can be identified by the file extension .vcf.

How to create a contact from an E-Mail's vCard attachment:

1. Display the E-Mail in the H Split or V Split view.

2. Right-click the .vcf file in the lower part of the overview window.

3. Select **Import vCard** from the context menu.

Result: The **Contact** dialog window will open.

4.6. Creating distribution lists

The following instructions shows how to create a new distribution list. The following chapters include detailed instructions on steps 5-7.

Note: If you want to create a new distribution list in a public or shared contact folder you need to have the folder permission for creating objects.

How to create a new distribution list:

1. In the **New** panel section click the **Further functions** icon ▾ .

2. In the menu click **Distribution list**. The **Distribution list** window will open.

3. If need be, select a contact folder by clicking the **Folder** button and selecting a contact folder.

4. In the **Name** input field enter a name for the distribution list.

5. If need be, add contacts from an address book.

6. If need be, add contacts as user-defined entries.

7. If need be, remove a contact from the distribution list.

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

Result: The distribution list is created.

If you do not want to create the distribution list click **Cancel** in the **Window** panel section.

Tip: The **Distribution list** function can also be invoked from within other modules in the **New** panel section.

4.6.1. Adding contacts from an address book

How to add contacts from an address book in the Distribution list window:

1. In the **Contact** panel section click **Add from address book**. The **Select contacts** window will open.

2. If you want to select a different address book than the global address book, click the **Contact folder** button. Click a folder in the **Select contact folder** window.

3. If you want to view a particular selection of participants or resources, enter a character string in the input field next to **Search**. Click the **Search** button.

4. Select one or several participants from the list.

5. To add the selection as participants click the **Add selection** button.

6. If need be, you can correct the selection by clicking the **Clear** button and repeating the selection.

7. To accept the selection click **OK**. If you do not want to accept the selection click **Cancel**.

Result: The names and E-Mail addresses of the selected contacts are entered in the distribution list.

4.6.2. Adding contacts as customized entries

You can add contacts that can not be selected from a groupware address book as customized entries to
the distribution list.

How to add contacts as customized entries in the Distribution list window:

1. In the **Contact** panel section click **Custom form**. The **External E-Mail** window will open.

2. In the **Name** input field enter the name of the external contact.

3. In the **E-Mail** input field enter the E-Mail address of the external contact.

4. If you want to view a particular selection of participants or resources, enter a character string in the
   input field next to **Search**. Click the **Search** button.

5. Click the **Add** button. The name and E-Mail address are entered in the list.

6. If need be, add further entries by repeating steps 2-4.

7. If need be, you can correct the selection by clicking the **Clear** button and making the entries again.

8. To accept the selection click **OK**. If you do not want to accept the selection click **Cancel**.

Result: The customized entries are added to the distribution list.

4.6.3. Deleting contacts from the distribution list

How to delete contacts from the distribution list in the Distribution list window:

1. Select an entry from the list.

2. In the **Contact** panel section click **Delete**.

Result: The entry is deleted from the distribution list.

4.7. Managing contacts

Those instructions are also valid for distribution lists. Exceptions are mentioned.

4.7.1. 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

Example: To find contacts with the last names "Neville, Mike" or "Jones, Mina", use "Last name" as the search criteria and "ne" as the search term.

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**.

4.7.2. Editing contacts

All the data you entered when creating the contact can be edited later on.

Note: If you want to edit a contact in a publich or shared contact folder you need to have editing rights for the objects in those contact folders.

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. A description of the data can be found in 4.5: Creating contacts. A description of a distribution list's data can be found in 4.6: Creating distribution lists.

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.

4.7.3. Printing contacts

There are the following possibilities for printing contacts:

- Printing a contact list
- Printing the contact's data

How to print a contact list:

1. Select the Phone list view in the panel.

2. Select the contacts to be printed:

   If you only want to print particular contacts select the contacts to be printed.

   If you want to print all contacts in the Phone list view either select all contacts or none.

3. In the **Contacts** panel section click **Print**. A new window with the print preview and the **Print** system window will open.

4. If need be, modify the print settings in the system window.

5. Click **Print** in the system window.

Result: The contact list is printed.

How to print a contact's data:

1. Display a contact in the Detail view.

2. In the **Contacts** panel section click **Print**. A new window with the print preview and the **Print** system window will open.

3. If need be modify, the print settings in the system window.

4. In the system window click **Print**.

Result: The contact's data is printed.

4.7.4. Copying contacts

You can copy contacts to the same folder or to another folder.

Note: When copying contacts from a source to a target folder you need to have the folder permission for creating objects in the target folder.

How to copy contacts:

1. Select one or several contacts in the Phone list or Cards view.

2. In the **Contacts** panel section click **Copy**. The **Select folder** window will open.

3. Click a contact folder in the **Select folder** window. You can only click on folders you can copy contacts to.

Result: The contacts are copied.

4.7.5. Duplicating contacts

This function is for using matching data from a contact for a new contact.

How to duplicate a contact:

1. Select a contact in the Cards or Phone list view.

2. In the **Contacts** panel section click **Use as template**. The **Contact** window will open.

3. Edit the contact data. A description of the data can be found in 4.5: Creating contacts. A description of a distribution list's data can be found in 4.6: Creating distribution lists.

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

Result: The contact is duplicated.

Tip: You can also use the context menu for duplicating a contact.

4.7.6. Moving contacts

The following possibilities exist for moving contacts:

- With the panel function

- With drag & drop

Note: To move contacts from a source to a target folder you need to have the following permissions:

- Delete permissions for the folder objects in the source folder

- The folder permission for creating objects in the target folder

How to move contacts with the panel function:

1. Select one or several contacts in the Cards or Phone list view.

2. In the **Contacts** panel section click **Move**. The **Select folder** window will open.

3. Click a contact folder in the **Select folder** window. You can only click on folders you can move contacts to.

Result: The contacts are moved.

How to move contacts with drag & drop:

1. Select one or several contacts in the Cards or Phone list view.

2. Drag a selected contact to a contact folder. An icon next to the mouse pointer indicates the following:

     When dragging to a valid target a green tick is shown.

     When dragging to an invalid target a red prohibited sign is shown.

3. Release the mouse button over the target folder.

Result: The contacts are moved.

4.7.7. Marking contacts with flags

Flags are colored labels for marking individual contacts. You can decide upon the meaning of the colors. The flags are displayed in the following locations:

- Next to the contact name in the Cards view

- In the last column of the Phone list view

- On the right side of the tabs header in the Detail view

How to mark contacts with flags:

1. Display a contact in the Detail view or select a contact in the Cards or Phone list view.

2. Click any flag but the first one in the **Flags** panel section.

Result: The selected contacts are marked with flags.

How to delete flags:

1. Display a contact marked with a flag in the Detail view or select contacts marked with flags in the Cards or Phone list view.

2. Click on the first flag in the **Flags** panel section.

Result: The flags are deleted.

4.7.8. 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.

4.7.9. Exporting contacts

You can export the contacts in a personal or public contact folder. The available file formats are CSV and vCard.

An other possibility for exporting the personal contacts folder can be found in 8.4.1: Exporting contacts with WebDAV.

How to export the contacts in a folder:

1. Right-click on a personal or public contact folder and select **Export** From the **Extended** subfolder.

2. In the submenu select **CSV** or **vCard**.

3. Depending on the browser you might be asked whether to open or save the file. Select **Save**.

4. Select a location. Enter a file name.

5. Click on **Save**.

Result: The contents of the contact folder are exported to a file of the CSV or vCard type. You can process those data with other applications.

4.7.10. Deleting contacts

Warning: Deleted contacts can not be restored. Prior to deleting a contact make sure you no longer need the contact.

Note: If you want to delete a contact in a public or shared contact folder you need to have the delete permission for the objects of this contact folder.

How to delete one or several contacts:

1. Display a contact in the Detail view or select one or several contacts in the Cards or Phone list view.

2. In the **Contacts** panel section click **Delete**. The **Delete contact** window will open.

3. If you are sure you want to delete the contacts click **Yes**.

Result: The contacts are finally deleted.

Tip: In the Cards or Phone list view you can also use the context menu or the <del> key for deleting contacts.

Chapter 5. Calendar module

5.1. Overview

Use one of the following methods to open the **Calendar** module:

In the module bar 🏠 👥 📅 📇 📆 📦 ⚙ click the **Calendar** icon 📅.

On the start page click the title bar of the Calendar module window.

In the folder tree click the **Calendar** folder or another calendar folder.

Click on a calendar week or day in the MiniCalendar.

The **Calendar** module:
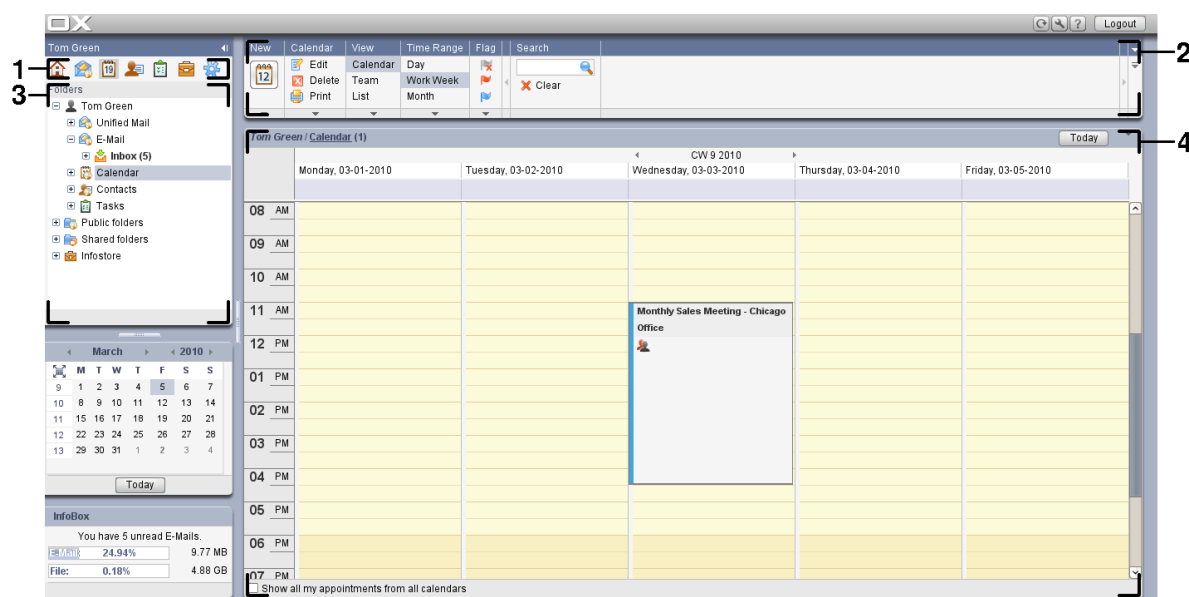
The module contains the following elements:

№	Element	Function
1	Module bar	Contains icons for opening the modules. The **Calendar** icon 📅 is selected.
2	Panel	Contains the functions available in the Calendar module, please refer to 5.3.1: The calendar panel.
3	Folder tree	Shows the personal calendar folders, please refer to 5.2.3: What is the purpose of calendar folders?.
4	Overview window	Shows the contents of the selected calendar folder, please refer to 5.3.2: The calendar overview window.

5.2. What you should know

5.2.1. What is the purpose of the Calendar module?

In the **Calendar** module you can:

- display calendars and appointments,
- create appointments,
- and manage calendars and appointments.

5.2.2. What should I know about appointments?

To understand the appointment display and to appropriately create appointments you should know the following:

- What are appointment types?
- What is the purpose of availability?

5.2.2.1. What are appointments types?

The appointment type defines the appointment participants and whether the appointment is a serial appointment.

There are the following types of appointments:

Appointment type	Characteristics
Standard appointment	An appointment with no particular characteristics.
Private appointment	An appointment that can only be viewed by the creator of the appointment. Example: The birthday of an acquaintance or a family member.
Appointment series	An appointment that is repeated at least once. Example: The team meeting that takes place every second Monday.
Group appointment	An appointment with several participants. Example: A team meeting.
Public appointment	An appointment saved in a public calendar folder. Each user can create public calendar folders. By default, public calendar folders are visible to all users. Example: A company meeting.
Shared appointment	An appointment saved in a shared calendar folder. Each user can share calendar folders with other users. Example: A meeting entered by the team lead in their own calendar. The calendar is shared with the team members.

When creating an appointment you can set the appointment type. When displaying a calendar, icons indicate the appointment type.

You can combine particular appointment types. You can, for example, create an appointment that takes place several times (serial appointment) and has several participants (group appointment).

5.2.2.2. What is the purpose of availability?

Availability defines whether the appointment participant is available for other tasks during the duration of the appointment. In the appointments' calendar views availability is indicated by a bar in a particular color.

Availability	Characteristics	Color
Reserved	The appointment is reserved. If the appointment overlaps with another booked appointment a conflict message is displayed. Example: A meeting you participate in.	Blue
Tentative	The appointment is booked, though the time range is not agreed upon. Example: A meeting on a date that is subject to change.	Yellow
Absent on business	The appointment is booked. The participant is absent on business for the duration of the appointment. Example: You are on a business trip.	Red
Free	The participant is available for other appointments for the duration of the appointment. Example: A co-worker's birthday.	Green

When creating an appointment you can define your availability.

5.2.3. What is the purpose of calendar folders?

Calendar folders allow you to structure calendars and appointments. An appointment is always created in a particular calendar folder. Each calendar folder in the folder tree represents a particular calendar. Select a calendar by clicking a calendar folder in the folder tree.

A calendar folder in the folder tree can be identified by the icon 🗓.

There are the following types of calendar folders:

- Personal calendar folders. These calendar folders are located in the folder tree below your root folder. The personal standard calendar folder is called **Calendar**. You can create additional personal calendar folders.

- Public calendar folders. These calendar folders are located in the folder tree below the folder **Public folders**. Each user can create public folders. By default, public folders are visible to all users.

- Shared calendar folders. These calendar folders are located in the folder tree below the folder **Shared folders**. A user can share personal calendar folders with other users.

Information on folder management can be found in 8.5: Folder Management and on sharing folders in 8.6: Permission management.

5.3. The calendar module interface

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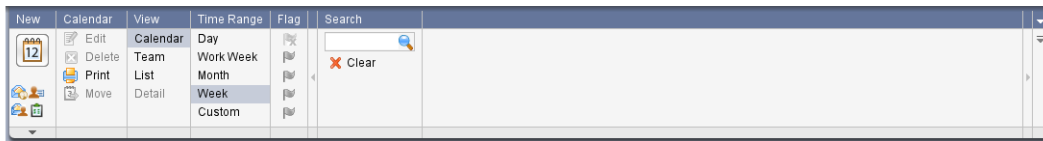
The calendar module contains the following functions in different panel sections:

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

5.3.2. The calendar overview window

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

The calendar overview window contains the following elements:

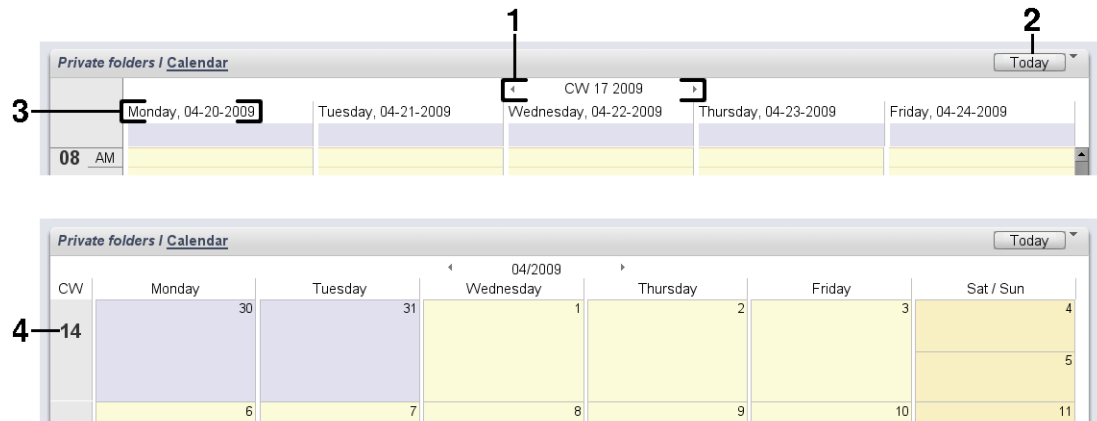| No	Element	Function
1	Labelling	Displays the name and the path of the current calendar folder and the number of appointments in this folder. **Tip:** You can browse the folder tree by clicking the underlined parts of the path. **Note:** Labelling is not shown in the team view.
2	Date bar	Displays the 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.

5.3.3. How to browse the calendar

The calendar overview window displays a particular time range: a particular month, for example. To view another month you can use the following control elements for navigation:

- the overview window control elements
- the MiniCalendar control elements.

5.3.3.1. Navigating with the overview window control elements

No.	Element	Function
1	Navigation arrows	Depending on the time range set, navigate back or forth 1 day, 1 work week, 1 month, or 1 week. The view that was set (Calendar, Team, or List) remains.
2	**Today** button	The time range with the current date is displayed in the overview window and in the MiniCalendar. The selected view (Calendar, Team, or List) remains.
3	Date is displayed in the single day columns Precondition: The **Work week** or **Custom** view is selected in the panel	Displays the **Day** calendar view for the selected date
4	Calendar week number Precondition: The **Month** calendar view is selected in the panel	Displays the **Week** calendar view for the selected week

5.3.3.2. Navigating with the MiniCalendar control elements
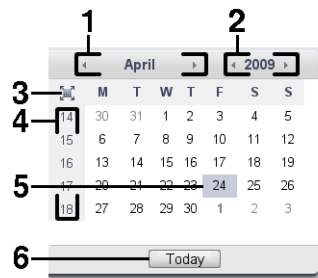
Nº	Element	Function
1	Navigation elements for the month	Clicking the month name opens a drop-down list for selecting a month. Clicking the navigation arrows browses back or forth one month.
2	Navigation elements for the year	Clicking the year opens a drop-down list for selecting a year. Clicking the navigation arrows browses back or forth one year.
3	**Show in calendar** button	The overview window shows the Month calendar view for the month selected in the MiniCalendar. Note: Displays the calendar view even if the Team or List view was pre-selected.
4	Calendar week	The overview window shows the Week calendar view for the selected calendar week. Note: Displays the calendar view even if the Team or List view was pre-selected.
5	Calendar day	The overview window shows the time range containing the selected day. The pre-selected calendar, team or list view remains.
6	**Today** button	The overview window and the MiniCalendar show the time range containing the current date. The pre-selected view (Calendar, Team, or List) remains.

5.4. Viewing the calendar and appointments

Depending on the calendar folder type the following appointments are displayed when selecting a calendar folder:

- When selecting a public or shared calendar, only the appointments in this calendar are displayed.

- When selecting a personal calendar, you can set the appointment display. The appointment display defines whether only the appointments in this calendar are displayed or all appointments from all personal, public, or shared calendars are displayed.

In order to display calendars and appointments you have to do the following:

- Select a calendar and the appointment display.

- Select a calendar view. The calendar view defines the display of the calendars and appointments in the content area. The following calendar views are available:

  - Calendar view

  - Team view

  - List view

  - Detail view

5.4.1. Selecting calendar and appointment view

Select a calendar folder by clicking on a calendar folder in the folder tree. The appointment display allows you to define whether only your appointments are displayed in the selected calendar or your appointments from other calendars are displayed as well.

How to view all of your appointments in all calendars:

1. Click a personal calendar folder in the folder tree.

2. Activate the **Show all my appointments from all calendars** checkbox.

How to only display the appointments for a particular personal calendar:

1. Click a personal calendar folder in the folder tree.

2. Deactivate the **Show all my appointments from all calendars** checkbox.

How to display the appointments for a public or shared calendar:

Click a public or shared calendar folder in the folder tree.

5.4.2. Displaying the calendar view

When selecting the calendar view the content area shows the calendar for the current calendar folder and the appointments for the current time range. The following time ranges can be selected:

- Day

- Work week

- Month

- Week

- Custom

5.4.2.1. Displaying the Day calendar view

The **Day** calendar view displays the calendar for a single day and the appointments for that day.

How to display the Day calendar view:

1. Select a calendar and the appointment display, please refer to 5.4.1: Selecting calendar and appointment view.

2. In the **View** panel section click **Calendar**.

3. In the **Time Range** panel section click **Day**. The calendar view for the current day is displayed.

4. To display a particular day click the navigation arrow ◂ or ▸ in the date bar.
   Result: The **Day** calendar view for the selected day is displayed.

5. To display the current day again click **Today** in the overview window's title bar or in the MiniCalendar.

The **Day** calendar view contains:

- The date for the day shown in the date bar.

- A time grid with the hours of the day. The working hours are marked in a different color than the other hours of the day. You can change the working hours and the grid division in the calendar settings **Interval in minutes** , **Start of working time** and **End of working time** .

- The appointments for the displayed day. A description of the appointment display can be found in 5.4.2.6: How are appointments displayed?.

5.4.2.2. Displaying the Work week calendar view

The **Work week** calendar view shows the calendar for a work week and the appointments for the work week.

How to display the Work week calendar view:

1. Select a calendar and the appointment display, please refer to 5.4.1: Selecting calendar and appointment view.

2. In the **View** panel section click **Calendar**.

3. In the **Time range** panel section click **Work week**. The calendar view for the current work week will be displayed.

4. To display a particular work week click the navigation arrow ◂ or ▸ in the data bar.
   Result: The **Work week** calendar view for the selected work week is displayed.

5. To display the current work week again click **Today** in the title bar of the overview window or in the MiniCalendar.

The **Work week** calendar view contains:

- The work week label in the date bar.

- A time grid with the working days and the working hours. The working hours are marked in a different color than the rest of the hours of the day. You can change the working hours and the division of the time grid in the calendar settings **Interval in minutes** , **Start of working time** and **End of working time** .

- The appointments for the displayed work week. A description of the appointment display can be found in 5.4.2.6: How are appointments displayed?.

5.4.2.3. Displaying the Month calendar view

The **Month** calendar view displays the calendar for one month and the appointments for this month.

How to display the Month calendar view:

1. Select a calendar and the appointment display. Please refer to 5.4.1: Selecting calendar and appointment view.

2. In the **View** panel section click **Calendar**.

3. In the **Time range** panel section click **Month**. The calendar view for the current month is displayed.

4. To display a particular month click the navigation arrow ◄ or ► in the date bar.
   Result: The **Month** calendar view for the selected month is displayed.

5. To display the current month again click **Today** in the title bar of the overview window or in the MiniCalendar.

The **Month** calendar view contains:

- The label for the current month in the data bar.

- A time grid that is divided into single days.

- The appointments for the displayed month. A description of the appointment display can be found in 5.4.2.6: How are appointments displayed?.

5.4.2.4. Displaying the Week calendar view

The **Week** calendar view displays the calendar for one week and the appointments for the week.

How to display the Week calendar view:

1. Select a calendar and the appointment display, please refer to 5.4.1: Selecting calendar and appointment view.

2. Click **Calendar**in the **View** panel section.

3. Click **Week** in the **Time range** panel section. The calendar view for the current week is displayed.

4. To display a particular week click the navigation arrow ◄ or ► in the date bar.
   Result: The **Week** calendar view for the selected week is displayed.

5. To display the current week again click **Today** in the title bar of the overview window or in the MiniCalendar.

Tip: To display a particular week you can also click a calendar week in the MiniCalendar.

The **Week** calendar view contains:

- The week label in the date bar.

- A time grid divided in single days.

- The appointments for the displayed week. A description of the appointment display can be found in 5.4.2.6: How are appointments displayed?.

5.4.2.5. Displaying the Custom calendar view

The **Custom** calendar view displays the calendar for a custom time range and the appointments in that time range.

The custom time range can be between 1 and 7 days. The time range can be set by you. The default setting is 7 days. Further information can be found in 8.2.6.1: Calendar settings.

How to display the Custom calendar view:

1. Select a calendar and the appointment display, please refer to 5.4.1: Selecting calendar and appointment view.

2. Click **Calendar** in the **View** panel section.

3. click **Custom** in the **Time range** panel section. The calendar view for the current custom time range is displayed.

4. To display a particular custom time range click the navigation arrow ◄ or ▶ in the date bar.
    Result: The **Custom** calendar view for the selected time range will be displayed.

5. To display the current time range again click **Today** in the title bar of the overview window or in the MiniCalendar.

The **Custom** calendar view contains:

- The time range label in the date bar.

- A time grid divided into single days.

- The appointments in the displayed time range. A description of the appointment display can be found in 5.4.2.6: How are appointments displayed?.

5.4.2.6. How are appointments displayed?

An appointment that is not an all-day appointment is displayed as a rectangle. The rectangle extends to the height of the appointment duration. Within the rectangle the following information is displayed:

- On the left side of the rectangle a colored bar indicates the availability status for the appointment:

  - Blue: reserved (default)

  - Yellow: tentative

  - Red: away on business

  - Green: Free

  Further information on availability can be found in 5.2.2: What should I know about appointments?.

- The appointment description is displayed in the upper part of the rectangle. Depending on your answer to the appointment notification, the appointment description contains the following information about your confirmation status:

  - If you have not yet accepted the appointment the appointment description contains the status "Waiting".

  - If you declined the appointment, the appointment description is crossed out.

  - If you tentatively accepted the appointmnent, the appointment description contains the status "Tentative".

  - If you accepted the appointment, the appointment description does not contian any additional details.

  If you display an appointment that is saved in a shared folder, the confirmation status of the shared folder's owner is displayed. Information on answering an appointment invitation can be found in 5.6: Answering appointment invitations.

- On the right of the appointment description the appointment location is displayed.

- Within the rectangle the appointment type is indicated by the following icons:

  - Private appointment

  - Group appointment

  - Appointment series

  Further information on appointment types can be found in 5.2.2: What should I know about appointments?.

- Several appointments on the same day are displayed as follows:

  - If appointments do not overlap they are shown one below the other.

  - If appointments overlap they are shown next to each other. In the default settings up to two appointments are displayed next to each other. In the calendar settings **Number of concurrent appointments shown in day view** you can set the number of appointments to be displayed next to each other.

  - If the number of overlapping appointments exceeds the number of appointments displayed next to each other, the icon is shown in the right side of the date bar. Click this icon to view all appointments. The list view is displayed. It shows all appointments for the current day.

  - If the Week calendar view contains more appointments than can be shown one below the other, a scrollbar is displayed.

  - If the Month calendar view contains more appointments than can be shown one below the other, the icon is displayed at the bottom. In order to view all appointments click this icon. The List view with all appointments for the current day is displayed.

An all-day appointment is displayed in the form of a filled rectangle. Depending on the calendar view, all-day appointments are displayed as follows:

- In the Day, Work Week, and Custom calendar views, all-day appointments are displayed on top of the time grid. If there are more than 5 all-day appointments for one day, a scrollbar is displayed.

- In the Week calendar view all-day appointments are displayed on top of the other appointments. If not all appointments for a day can be displayed one below the other, a scrollbar is displayed.

- In the Month calendar view all-day appointments are displayed on top of the other appointments. If not all appointments can be displayed one below the other, the ⌄ icon is displayed on the bottom. In order to display all appointments click this icon. The list view with all appointments for the current day is displayed.

5.4.3. Displaying the list view

The List view displays the appointments in the form of a table.

How to display appointments in the list view:

1. Select a calendar and the appointment display, please refer to 5.4.1: Selecting calendar and appointment view.

2. Click **List** in the **View** panel section.

3. Click a time range in the **Time range** panel section.

Result: A list of appointments in this time range is displayed.

For each appointment the list shows one line with information in the form of icons or texts:

Icon or text	Information
Column 1, icon 🗓	Single appointment
Column 1, icon 🗓	Appointment series
Column 2, icon 👥	Group appointment
Column 2, icon 🔑	Private appointment
Title column	Appointment title
Start column	Date and time for the start of the appointment
End column	Date and time for the end of the appointment
Location column	Appointment location
Folder column	Appointment's calendar folder
Flag column	Flag assigned to the appointment.

The appointments in the list are sorted after the **Start** column in ascending order by default. The column title is highlighted. An arrow icon next to the column title indicates the sort order.

How to change the sort order:

1. To sort after a column click the column title.

2. To change the sort order, click the column title again.

Result: The sort order is changed.

Note: The first two columns and the **Folder** column can not be used for sorting.

5.4.4. Displaying the Detail view

The Detail view displays all information about an appointment.

How to display an appointment in the Detail view:

1. Select a calendar and the appointment display, please refer to 5.4.1: Selecting calendar and appointment view.

2. Select an appointment.

3. In the **View** panel section click **Detail**.

Result: The appointment's Detail view will be displayed.

The Detail view displays the following information:

- The window title contains the appointment's description, the start, and the end.

- The **Appointment** tab contains details on the appointment description, the location, duration, creator, participants, resources, appointment type, tags, calendar folder, appointment availability display, comments, and reminder.

- The **Participants** tab contains the list of participants and resources. For each participant the status is either displayed as accepted, declined, or waiting. If a participant has entered a comment it will be displayed.

- The **Attachments** tab contains the list of attachments.

5.4.5. Displaying the team view

In the Team view you can see the appointments of users and groups and the resources booked for a particular date.

How to display the Team view:

1. In the **View** panel section click on **Team**.

2. In the **Time Range** panel section select a time range.

3. Add team members or select a team. Instructions can be found further below.

Result: The Team view is displayed.

The Team view contains the following information:

- Below the date bar the time bar displays a subdivision displayed in days or hours, depending on the time range selected.

- Below the time bar the time grid displays the team member's appointments. The time grid covers the time range preset in the **Time Range** panel section.

- All-day appointments are displayed in the time grid with a rectangle in the background. The rectangle starts at 00:00 and ends at 24:00. Other appointments are displayed in the foreground in the same way as in the Calendar view, see 5.4.2.6: How are appointments displayed?.

- Appointments that are greyed out can only be read, not edited.

The team view offers several display functions to clearly display time ranges.

How to use the display functions in the team view:

1. In the **Time Range** panel section select a time range.

2. In order to move the displayed time range use one of the following options:

Click on the navigation arrow in the date bar ◂ or ▸ .

Click on a day in the MiniCalendar.

3. If the displayed time range can not be fully displayed, you can scroll by proceeding as follows:

Drag the time bar (below the date bar) to the right or to the left.

Use the scroll bar below the time grid.

Use the mouse wheel.

4. In order to zoom the time range use one of the following options:

Select a zoom level between 10% and 1000% from the drop-down menu below the time grid.

Drag the zoom ruler below the time grid to the right or to the left.

Turn the mouse wheel while holding down the <Shift> key.

Depending on the zoom level selected, the resolution of the time grid is between 1 hour and 5 minutes.

5. Use the **Details** checkbox to set the displayed details for an appointment:

In order to display appointments only as filled rectangles, deactivate the checkbox.

In order to display appointments with a description, start and end date, activate the checkbox.

6. In order to display the current day click on the **Today** button above the date bar.

How to add users, groups, or resources as a team member:

1. Click **Add** in the **Team member** panel section. The **Select Participants** window will open.

2. To view a particular selection of users, groups or resources enter a character string in the input field next to **Search**. Then click the **Search** button.

3. Select one or several users, groups, or resources from the list. **Note:** Users, groups, and resources are marked with different icons. Groups and resources are listed below the users.

4. To add the selection as participants click the **Add** button next to **Participants**. To add the selection as resources click the **Add** button next to the **Resource**.

Note: There are the following limitations:

Resources can not be added as participants.

Groups can not be added as resources.

5. If need be you can correct the selection of participants or resources:

Select single entries in the **Participants** or **Resources** field.

Click the **Delete** button next to **Participants** or **Resources**.

6. To accept the selection click **OK**. If you do not want to accept the selection click **Cancel**.

Result: The selected users, groups, and resources are added as team members.

Tip: You can also add team members as follows:

Click the icon in the last row of the **Team Members** column. The **Select Participants** window opens.

In the last row of the **Team Members** column enter the name of a particpant in the the input field.

Tip: You can use drag and drop to change the sort order of the team members.

How to select an existing team:

1. Click **Select Team** in the **Team Member** panel section.

2. Click a team in the pop-up window.

Note: Prior to selecting a team it needs to be created in the calendar settings. Details can be found in 8.2.6.2: Teams.

How to remove team members from the team view:

1. Select individual team members by clicking on the names while holding the <ctrl> key. Note: on Mac machines use the <cmd> key.

2. In the **Team Member** panel section click **Remove**.

Tip: You can also remove individual team members as follows:

Let the mouse pointer hover over a team member. A button is displayed on the right side of the name.

Click the button.

5.4.6. Displaying hovers

Hovers are available in the Calendar, Team and List view, also while creating a new appointment in the **Appointment** window on the **Availability** tab.

How to display an appointment in the hover:

1. Move the mouse pointer to an appointment. After a short delay the hover will open. The **General** tab is visible.

2. To view further information click another tab.

3. To close the hover move the mouse pointer out of the hover.

The calendar hover displays the following information:

- The **General** tab. It contains:
  - The calendar module icon.
  - The description and location of the appointment.
  - The icons for private appointment, appointment series, and group appointment.
  - The appointment's start and end.
  - The appointment creator's name.
  - The comment for the appointment. Depending on the comment's length the hover only displays the first lines. When clicking the text, further lines are displayed. When clicking the text a second time, the original view is shown again.

- The **Participants** tab. The number in brackets equals the number of participants. The tab contains:
  - The name and confirmation status of each participant. If a participant accepted the name is displayed in green letters; if a participant declined, the name is displayed in red letters.
  - The comment entered by the participant in addition to the confirmation status
  - An icon for changing the confirmation status.

- The **Attachments** tab. The number in brackets equals the number of attachments. If the appointment contains attachments the following elements are displayed:
    - File name, file size, and attachment type
    - Icons for opening and saving the attachment
- The **Other** tab. It contains:
    - The folder the appointment is saved to.
    - The tags added to the appointment.
    - The name of the person who created or modified the appointment.

5.4.7. Opening or saving attachments

You can do the following:

- Open the attachment
  Note: To open an attachment extra software might be required.
- Save the attachment outside of the groupware
- Save the attachment in the InfoStore.

How to open or save an appointment's attachments:

1. Display the appointment in the Detail view.

2. Select the **Attachments** tab.

3. Select the attachment.

4. If you want to open the attachment:

    In the **Attachment** panel section click **Open**. A system window opens. It shows the software used for opening the attachment.

    Use the system window's control elements for opening the attachments.

5. If you want to save the attachment:

    In the **Attachment** panel section click **Save**. A system window opens.

    Use the system window's control elements for saving the attachment.

6. If you want to save the attachment in the InfoStore:

    In the **Attachment** panel section click **Save in InfoStore**. The **InfoStore item** window opens. The attachment's file name is used as the file name for the InfoStore item.

    Information on the creation of InfoStore items can be found in 7.5: Creating an InfoStore item.

Tip: An attachment can also be opened or saved by clicking the respective icons in the appointment's hover.

5.5. Creating appointments

Here you will get an overview of how to create appointments. Details will follow on the next page.

Note: To create an appointment in a public or shared calendar folder you need to have the folder permission for creating objects.

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. See 5.5.2: Setting the appointment start and end

5. Set the appointment reminder. See 5.5.3: Setting or replying to an appointment reminder

6. Select the availability view: Booked, Tentative, Absent on business, or Free. See 5.5.6: Setting the availability view

7. Use additional options if needed:

   Create an appointment series. See 5.5.4: Creating serial appointments

   Add tags to the appointment. See 5.5.5: Adding tags

   If required mark the appointment as private. See 5.5.7: Marking an appointment as private

   Add further participants and resources to the appointment. Check whether the participants and resources are available for the appointment. See 5.5.8: Adding participants and resources and 5.5.8.1: Checking availability

   Add attachments to the appointment. See 5.5.9: Adding attachments

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

Result: The appointment is created.

If you want to cancel the action click **Cancel** in the **Window** panel section.

Note: If you create an appointment that overlaps with an existing appointment you might get an error message. Please refer to 5.5.11: Resolving appointment conflicts.

The following possibilities exist for creating a new appointment:

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

   In the list or a calendar view double-click a free area in the overview window. The **Appointment** window opens.

   In the team view double-click on a calendar in the overview window. You are added as a participant of the appointment as well as the person or resource whose calendar you clicked on.

   In a calendar view drag open an area in the time grid. A detailed description can be found later in this chapter.

   In the E-Mail module drag an E-Mail from the List view to a day in the MiniCalendar. The **Appointment** window opens. The day is entered as the appointment start.

   In the Contacts module drag a contact to a day in the MiniCalendar. The **Appointment** window opens. The day is entered as the appointment start.

How to create a new appointment by dragging open an area:

1. Display the Day, Work week, or Custom calendar view.

2. Drag open an area in the time grid. A new appointment is created. Start and end result from the time grid area.

3. Double-click the rectangle of the new appointment. The **Appointment** window opens.

4. Enter the data for the new appointment. Further information can be found in the instruction above How to create a new appointment: [77].

5.5.1. Creating an appointment in the team view

When creating an appointment in the team view you can add

▪ all team members,

▪ particular team members, or

▪ a single team member

as participants.

How to create a new appointment with all team members:

1. Open the team view. Instructions can be found in 5.4.5: Displaying the team view

2. Make sure no team member is selected.

3. Use one of the following options:

   In the **Appointment** panel section click **New**.

   In the time grid drag a time range by clicking and holding the left mouse button. The time range is entered as appointment start and duration.

Result: The **Appointment** window opens. The team members are entered in the **Participants** tab.

How to create a new appointment with specific team members:

1. Open the team view. Instructions can be found in 5.4.5: Displaying the team view

2. Select individual team members by clicking on the names and holding the <ctrl> key. Note: On Mac systems use the <cmd> key.

3. Use one of the following options:

   In the **Appointment** panel section click **New**.

   In the time grid drag a time range by clicking and holding the left mouse key. The time range is entered as the appointment start and duration.

Result: The **Appointment** window opens. The team members are entered in the **Participants** tab.

How to create a new appointment with a single team member:

1. Open the team view. Instructions can be found in 5.4.5: Displaying the team view

2. Make sure no team member is selected.

3. Double-click on a time in the time grid of the team member you want to add as a participant.

Result: The **Appointment** window opens. The day and time you double-clicked on is entered as the appointment start. The team member is entered in the **Participants** tab.

5.5.2. Setting the appointment start and end

The following values are preset:

▪ The current date is set as appointment start and end date.

▪ The next complete time interval is set as time for the appointment start. The default time interval is 15 minutes.

▪ The appointment end is set one hour after the appointment start.

To set individual values for the appointment start and end use the control elements next to **Starts at** and **Ends at** in the **Appointment** window.

How to set the appointment start and end in the Appointment window:

1. To set the date for the appointment start and end use one of the following alternatives:

   Enter a valid date in the first input field.

   Click the calendar icon to the right of the first input field to open the calendar and choose a date.

2. To set the time of the appointment start and end use one of the following alternatives:

   Enter a valid time in the second input field.

   Select the time from the drop-down list.

   If it is supposed to be a 24 hour appointment activate the **All day** checkbox.

5.5.3. Setting or replying to an appointment reminder

You can define a time for being reminded of an appointment. A reminder window will alert you of the appointment when the end of the selected period has been reached.

How to set an appointment reminder in the Appointment window:

1. Select the **Appointment** tab.

2. Select a time interval from the **Remind me** drop-down list. If you do not want to be reminded select **No reminder**.

Tip: You can select the default time interval for the reminder in the calendar setting **Default time for reminder** .

As soon as the time interval before the appointment start is reached the **Reminder** window is displayed. There are several possibilities for replying to this appointment reminder.

How to reply to an appointment reminder:

To be reminded again select a time interval from the drop-down list. Click **Remind me again**. When the end of the interval is reached you will be reminded again.

If you do not want to be reminded again click **OK**.

5.5.4. Creating serial appointments

A serial appointment is an appointment that is repeated several times. When creating a serial appointment the following must be set:

- The time interval for the appointment series. This defines the period between the single appointments in the series.

- The time range for the appointment series. This defines the start and end of the serial appointment.

How to create a serial appointment in the Appointment window:

1. Select the **Appointment** tab.

2. Click the **Series** button. The **Create new series** window opens.

3. Select a time interval for the series.

    If the appointment is to be repeated daily activate the serial type **Daily**. In the series options define the interval in days.

    If the appointment is to be repeated monthly activate the serial type **Monthly**. In the series options define the interval in months and the day of the month.

    If the appointment is to be repeated weekly activate the serial type **Weekly**. In the series options define the interval in weeks and the day of the week.

    If the appointment is to be repeated yearly activate the serial type **Yearly**. In the series options define the day of the year.

4. Define the time range of the serial appointment:

    Next to **Start date** set the start of the serial appointment.

    Next to **Ends** set the end of the serial appointment.

5. Click **OK**.

5.5.5. Adding tags

A tag is text that can be used as criterion for structuring appointments. There are 2 possibilities for adding tags:

- Enter tags in the input field next to the **Tags** button.

- Select tags from a list of pre-defined tags.

How to add pre-defined tags in the Appointment window:

1. Select the **Appointment** tab.

2. Click the **Tags** button.

3. Select one or several tags from the **Select tags** dialog window. Click **OK**.

Result: The tags are entered in the input field.

Note: Prior to being able to select tags from a list, you have to define the tags in the groupware settings. Further information can be found in 8.2.3: Tags.

Tip: To delete a tag edit the input field.

5.5.6. Setting the availability view

In the calendar views the availability is indicated in different colors. The following colors are used:

- Reserved: blue
- Tentative: yellow
- Absent on business: red
- Free: green

Further information on availability can be found in 5.2.2: What should I know about appointments?.

The availability controls the groupware behavior in case you create a new appointment that overlaps time-wise with an existing appointment:

- For the **Reserved**, **Tentative**, and **Absent on business** availabilities a conflict message is shown.
- For the **Free** availability no error message is displayed.

Further information on conflict handling can be found in 5.5.11: Resolving appointment conflicts.

How to set the availability view in the Appointment window:

1. Select the **Appointment** tab.
2. Select an option from the **Display as** drop-down list.

5.5.7. Marking an appointment as private

A private appointment is an appointment that can not be viewed by other users when sharing your calendar with other users.

You can mark an appointment as private if all of the following conditions are met:

- You are the sole participant, there are no other participants or resources for the appointment.
- The appointment is created in a personal calendar folder.

How to mark an appointment as private in the Appointment window:

    Open the **Appointment** tab.

    Activate the **Private appointment** checkbox.

5.5.8. Adding participants and resources

When creating an appointment you are automatically added as participant. In the calendar settigns you can define whether you are entered as participant when creating an appointment in a public folder, please refer to : Creating public appointments. You can add further participants and resources (such as rooms or projectors).

How to add participants and resources to an appointment in the Appointment window:

1. Open the **Participants** tab.

2. In the **Participants** panel section click **Add**. The **Select participants and resources** window opens.

3. The global address book is pre-selected. To select another address book click the **Contact folder** button. Click on a folder in the **Select contact folder** window.

4. If you want to view a particular selection of participants or resources, enter a character string next to the **Search** input field. Click the **Search** button.

5. Select one or more users, groups or resources from the list.
   Note: Users, groups, and resources are marked with different icons. They are displayed in the following order: users, groups, and resources.

6. In order to add the selection as participants, click the **Add** button next to **Participants**. In order to add the selection as resources click the **Add** button next to **Resource**.

   Note: There are the following limitations:

   Resources can not be added as participants.

   Groups can not be added as resources.

   Note: Resources in use can not be used as resource in another appointment if the appointments overlap.

7. If need be, you can change the selection of participants or resources:

   Select single entries in the **Participants** or **Resources** field.

   Click the **Delete** button next to **Participants** or **Resources**.

8. In order to accept the selection click **OK**. If you do not want to accept the selection, click **Cancel**.

When having added participants and resources, it might make sense to check their availability.

5.5.8.1. Checking availability

This function shows which participant or resource is already booked on a particular day. The availability status is displayed with colored bars.

The colors correspond to the colors used for displaying availability, please read 5.2.2: What should I know about appointments?.

How to check the availability of participants and resources in the Appointment window:

1. Select the **Availability** tab.

2. Choose the date and time range you want to check.

3. Click the **Check** button. Colored bars next to a participant or resource indicate that the participant or the resource is booked for this time range.

4. If necessary you can check another day by selecting it with the navigation arrows next to the date and then clicking the **Check** button again.

5. If you find a date and time that is suitable for all participants and resources you can use the dates of the checked time range for your appointment. To do so click the **Use for appointment** button.

Tip: Prior to creating the appointment you can check the availability of participants in the team view. Further information can be found in 5.4.5: Displaying the team view.

5.5.8.2. Adding external participants without an addressbook entry

You can add external participants that are not entered in the address book. To do so you need the E-Mail address for the external participant.

How to add external participants without an address book entry:

1. In the **Participants** panel section of the **Appointment** window click on **Add external**.

2. In the **External addresses** window enter a name and a valid E-Mail address.

3. Click **Add**.

4. To add further participants repeat steps 2 and 3. To finish the process click **OK**.

Result: The external participants without an address book entry are entered as participants.

Further information on appointments with external participants can be found in 5.7: Appointments with external participants.

5.5.8.3. Notify participants by E-Mail

Participants that you add to an appointment receive an appointment notification that offers the possibility to accept or decline the appointment. Further information can be found in 5.6.1: Accept appointment.

External participants do not receive an appointment notification. To notify external participants of an appointment you can notify all participants by E-Mail.

How to notify all participants by E-Mail in the Appointment window:

1. Select the **Appointment** tab.

2. Activate the **Notify all participants by E-Mail** checkbox.

5.5.9. Adding attachments

How to add attachments in the Appointment window:

1. Select the **Attachments** tab.

2. In the **Attachments** panel section click **Add attachments**. The **Select attachments** dialog window opens.

3. In the **Select attachments** dialog window click **Browse**. Select the file to be added as an attachment. Close the file selection dialog window.

4. In the **Select attachments** dialog window click **Add**. The file is entered in the list field.

5. To add additional attachments repeat steps 3 and 4.

6. To remove an attachment select it in the list field. Then click **Remove**.

7. In the **Select attachments** dialog window click **OK**.

Result: The attachments are added to the appointment.

5.5.10. Creating appointments from iCal attachments

You can create an appointment from an E-Mail's iCal attachment. An iCal attachment can be identified by the file extension .ics.

How to create an appointment from an E-Mail's iCal attachment:

1. Open the E-Mail in the H split or V split view.

2. Right-click the .ics file in the lower part of the overview window.

3. Select **Import iCal** in the context menu.

Result: The **Appointment** dialog window opens.

5.5.11. Resolving appointment conflicts

An appointment conflict occurs if the following conditions concur:

- The availability of an existing appointment is not set to **Free**.

- You create a new appointment and do not set its availability to **Free**. The new appointment overlaps with an already existing appointment.

As soon as you click the **Save** icon in the panel of the **Appointment** window the **Conflicts detected** window opens. It shows the conflicts between the existing appointments and the new appointment. You have to react to the conflict message.

How to react to the conflict message:

If you want to solve the conflict by changing the appointment date click on **Cancel**. Change the appointment date.

If you want to create the new appointment despite the appointment conflict click **Ignore**.

5.6. Answering appointment invitations

If another user adds you as participant to an appointment you will be notified about the appointment in the **Select confirmation** pop-up window. In the pop-up window you can confirm the appointment invitation.

The calendar view shows whether you accepted, declined, or have not yet answered an appointment invitation. Information on displaying appointments in the calendar view can be found in 5.4.2.6: How are appointments displayed?

5.6.1. Accept appointment

As long as you do not accept the appointment your status remains set to **Waiting**. You can change this behavior in the calendar settings **Confirmation status for appointments in personal calendars: set status to**   and **Confirmation status for appointments in public calendars: set status to** .

How to confirm an appointment in the Select confirmation pop-up window:

If you want to accept the invitation click **Accept**. Your status is set to **Confirmed**.

If you want to refuse the invitation click **Decline**. Your status is set to **Declined**.

If you temporarily want to accept the invitation click on **Temporary**. Your status is set to **Temporary**.

If you want to decide later click **Later**. Your status remains set to **Waiting**. You will be reminded regularly that you have to confirm the appointment.

If there are multiple appointments to be confirmed when logging in, the appointments are displayed in the **Select confirmation** window.

How to confirm several appointments in the Select confirmation pop-up window that is shown after login:

1. Click on an appointment.

2. You can open the appointment in the Day calendar view by clicking **Show in calendar**.

3. You can enter a comment in the **Comment** input field.

4. Click on **Accept**, **Decline**, **Tentative**, or **Later**.

5. Repeat steps 1-4 for the other appointments.

Tip: In order to answer all appointment invitations in the same way, activate the **All** checkbox. Then click **Accept**, **Decline**, **Tentative**, or **Later**.

5.6.2. Changing an appointment confirmation

You can always change your confirmation of an appointment invitation.

So ändern Sie Ihre Terminbestätigung:

1. Display the appointment in the Detail view.

2. In the **Confirmation** panel section click **Change**. The **Select confirmation** window opens.

3. Click **Accept**, **Decline**, **Temporary** or **Later**.

Result: Your confirmation status is changed.

If you do not want to change the confirmation click the **End** button in the upper right part of the window.

Tip: In the list view or in the calendar views you can also change the appointment confirmation via the context menu.

5.7. Appointments with external participants

In order to schedule common appointments with external participants as internal participants, the appointment details have to be exchanged between the Open-Xchange Server and the calendar application of the external participant.

There are two different scenarios:

- You create or change an appointment as internal participant.

- An external participant creates or changes an appointment to which you were invited.

5.7.1. You create or change an appointment

If you activate the **Notify all participants by E-Mail** checkbox when creating an appointment, external participants will receive an E-Mail with the appointment details as an iCal attachment. The E-Mail with the appointment details are sent to external participants if an internal participant

- creates the appointment,

- adds participants,

- or deletes the appointment.

With the details sent, external participants can manage the appointment in their calendar application.

Information on adding external participants to an appointment can be found in 5.5.8.2: Adding external participants without an addressbook entry.

5.7.2. An external participant creates or changes an appointment

If an external participant sends you an E-Mail with the appointment details attached in iCal format, you can

- answer the appointment invitation by accepting or declining the appointment,

- update an existing appointment if other participants have changed their confirmation status.

How to answer an appointment invitation from an external participant:

1. Switch to the E-Mail module.

2. Display the E-Mail with the appointment invitation in the H split or V split view.

3. Use the control elements displayed below the E-Mail header to reply to the invitation:

    Enter a comment.

    If you want to participate click on **Accept**.

    If you do not want to participate, click on **Decline**.

Result: The appointment is entered in your calendar. The external participant is notified by E-Mail about your answer.

How to update the attendance status of an external participant:

1. Switch to the E-Mail module.

2. Display the E-Mail with the changed attendance status in the H split or V split view.

3. Click on **Update appointment** below the E-Mail header.

Result: The appointment will be updated in your calendar.

5.8. Managing appointments

5.8.1. Searching for appointments

By entering a search term you can find appointments in the currently open calendar folder. The search term defines the character string to be searched for.

All appointments with a title containing the search term will be found.

Example: To find appointments with the titles "Meeting" and "Team meeting", use the search term "me".

How to search for an appointment:

1. In the folder tree select the calendar folder that you would like to scan.

2. Select the list view or a calendar view.

3. You search for specific appointments using the **Search** function from the panel section with the same name.

   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. In the **Search** panel section click the **Search** 🔍 icon.

Result: The overview window switches to the list view. The list view only displays the appointments matching the search term.

How to display all appointments for the currently selected calendar folder:

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

5.8.2. Editing appointments

You can edit all data entered when creating the appointment at a later time.

Note: If you want to edit an appointment in a public or shared folder you need to have the edit permission for the objects in the calendar folder.

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 5.5: Creating appointments.

4. Click the **Save** icon in the panel. The window is closed.

Result: The appointment is modified.

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

Note: If you edit an appointment that overlaps with another appointment you might receive a conflict message. Further information can be found in 5.5.11: Resolving appointment conflicts.

Tip: You can also edit appointments by using the context menu or by double-clicking on an appointment.

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.

5.8.3. Editing appointments with drag & drop

In the calendar views you can perform the following actions by using drag & drop:

▪ move an appointment to another day,

▪ change an appointment's time,

▪ change an appointment's start or end date.

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.

Tip: To move an appointment displayed in the Day view to another day, drag the appointment to a day in the MiniCalendar.

Tip: In the Work week and Custom views you can also change the time of an appointment by dragging it to another day in the time grid.

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.

Tip: In the Work week and Custom views you can also change the day of an appointment by dragging it to another time in the time grid.

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.

5.8.4. Editing an appointment series

When editing an appointment series you need to choose one of the following possibilities:

- Changing the whole appointment series
- Changing a single appointment of the appointment series

You can make your selection in the **Edit appointment** pop-up window.

How to edit a whole appointment series:

1. Use one of the following methods described in 5.8.2: Editing appointments and 5.8.3: Editing appointments with drag & drop.

The **Edit appointment** pop-up window opens.

2. In the **Edit appointment** pop-up window click on **Series**.

Result: The changes are applied to the whole series.

Note: If there is an exception to the appointment series, the exception loses its changes and is re-integrated into the series.

How to edit a single appointment from the series:

1. Use one of the methods described in 5.8.2: Editing appointments and 5.8.3: Editing appointments with drag & drop.

The **Edit appointment** pop-up window opens.

2. In the **Edit appointment** pop-up window click **Appointment**.

Result: An appointment exception is created. The changes are only applied to the appointment exception.

Note: If you edit the whole series afterwards, the appointment exception loses its changes and is re-integrated into the series.

Note: If you use drag & drop to move an appointment of the series to another day, you can only change the single appointment from the series. The **Edit appointment** pop-up window shows the following message:

If you change the date of this appointment an appointment exception is created for the series. Do you want to continue?

To create an appointment exception click **Continue**. To cancel the action click **Cancel**.

5.8.5. Printing appointments

There are the following possibilities for printing appointments:

- Printing a list of appointments
- Printing an appointment's data
- Printing a calendar sheet with appointments

How to print a list of appointments:

1. Select the List view in the panel.

2. Select a time range in the panel.

3. Select the appointments to be printed:

If you want to print only part of the appointments in the List view, select the appointments to be printed.

If you want to print all of the appointments in the List view, either select all appointments or none.

4. In the **Calendar** panel section click **Print**. A new window with the print preview and the **Print** system window will open.

5. If required change the print settings in the system window.

6. In the system window click **Print**.

Result: The appointments list is printed.

How to print the data for an appointment:

1. Open an appointment in the Detail view.

2. In the **Calendar** panel section click **Print**. A new window with the print preview and the **Print** system window will open.

3. If required change the print settings in the system window.

4. In the system window click **Print**.

Result: The data for the appointment is printed.

How to print a calendar sheet:

1. Open the Month, Week, or Work Week calendar view.

2. Click on **Print** in the **Calendar** panel section. A new window with the print preview and the **Print** system window open.

3. If required, you can change the print settings in the system window.

4. Click on **Print** in the system window.

Result: The pre-set calendar view will be printed.

5.8.6. Moving appointments to another folder

The following possibilities exist for moving appointments to another folder:

- With the panel function
- With drag & drop

Note: When moving appointments from a source to a target folder you need to have the following permissions:

- Delete permission for the objects in the source folder

- Folder permission for creating objects in the target folder

How to move appointments by using the panel function:

1. Select one or several appointments in the List view or in a calendar view.

2. In the **Calendar** panel section click on **Move**. The **Select folder** window will open.

3. Click on a calendar folder in the **Select folder** window. You can only click on folders that you can move appointments to.

Result: The appointments are moved.

How to move appointments with drag & drop:

1. Select one or several appointments in the List view or in a calendar view.

2. Drag a selected appointment to a calendar folder. An icon next to the mouse pointer indicates the following:

   When dragging to a valid target a green tick is displayed.

   When dragging to an invalid target a red prohibit icon is displayed.

3. Release the mouse button over the target folder.

Result: The appointments are moved.

5.8.7. Marking appointments with flags

Flags are colored labels for marking appointments. You can decide upon the meaning of the individual colors. The flags are displayed as follows:

- In the List view in the last column
- In the Detail view on the right side next to the tabs
- In the Calendar views on the right side next to the appointment titles

How to mark appointments with flags:

1. Open an appointment in the Detail view or select one or several appointments in the List view or in a calendar view.

2. In the **Flags** panel section click on any flag except the first one.

Result: The selected appointments are marked with flags.

How to delete flags:

1. Open an appointment that is marked with a flag in the Detail view or select appointments marked with flags in the List view or in a calendar view.

2. Click on the first flag in the **Flags** panel section.

Result: The flags are deleted.

5.8.8. Deleting appointments

Warning: Deleted appointments can not be restored. Prior to deleting an appointment make sure you no longer need the appointment.

Note: If you want to delete an appointment in a public or shared folder you need to have delete permission for the objects in these calendar folders.

How to delete one or several appointments:

1. Open an appointment in the Detail view or select one or several appointments in the List view or in a calendar view or in the day time range of the team view.

2. In the **Calendar** panel section click **Delete**. The **Delete appointment** window will open.

3. If you are sure you want to delete the appointments click **Yes**.

Result: The appointments are deleted. All participants will receive an E-Mail notification about the deletion of the appointment.

Tip: In the List view or in a calendar view you can also delete appointments by using the context menu or the <del> key.

Chapter 6. Tasks module

6.1. Overview

To open the **Tasks** module, use one of the following methods:

Click the **Tasks** icon 🗓 in the module bar 🏠 📧 🗓 👤 📁 📦 ⚙.

On the start page click on the title bar of the **Tasks** module window.

In the folder tree click on the **Tasks** folder or on another tasks folder.

The **Tasks** module:
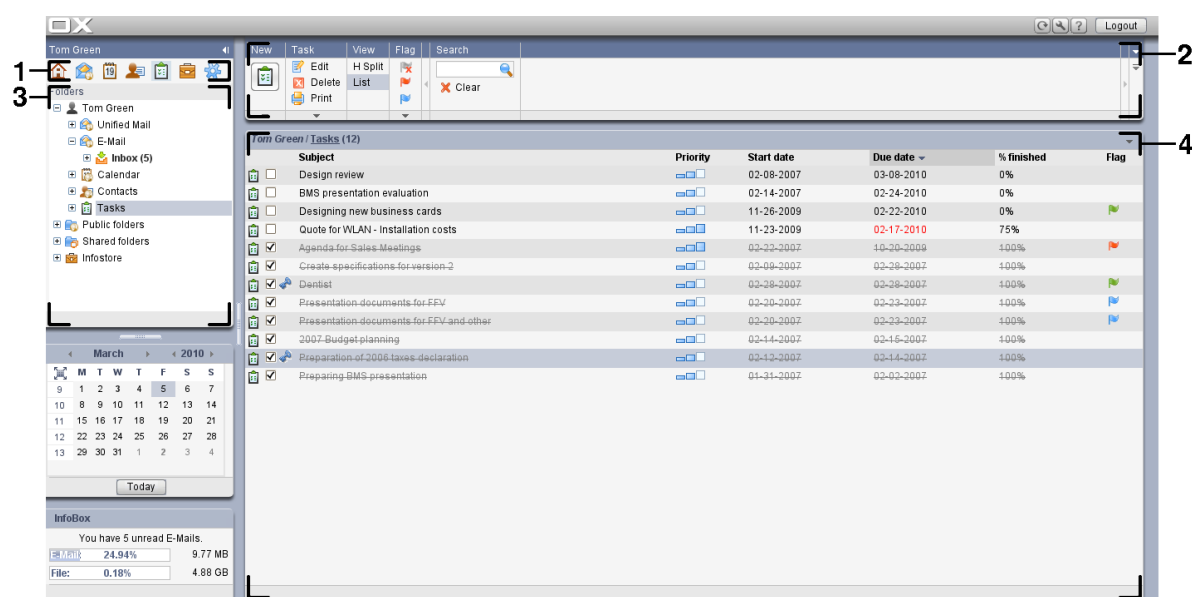
The module contains the following elements:

Nr.	Element	Function
1	Module bar	Contains icons for opening the modules. The **Tasks** icon 🗓 is selected.
2	Panel	Contains the functions available in the Tasks module, please refer to 6.3.1: The tasks panel.
3	Folder tree	Shows the personal tasks folders, please refer to 6.2.3: What is the purpose of the tasks folders?.
4	Overview window	Shows the contents of the selected tasks folder, please refer to 6.3.2: The tasks overview window.

6.2. What you should know

6.2.1. What is the purpose of the Tasks module?

In the **Tasks** module you can

- display tasks,
- create tasks,
- and manage tasks.

6.2.2. What should I know about tasks?

To appropriately work with tasks you should know what types of tasks exist.

There are the following types of tasks:

Task type	Characteristics
Standard task	A task that has not been assigned any particular characteristics.
Private Task	A task that can only be viewed by the creator of the task.
Task series	A task that is repeated at least once. Example: Weekly proof of working hours.
Public task	A task in a public tasks folder. Each user can create public tasks folders. By default public tasks folders are visible to all users.
Shared task	A task in a shared tasks folder. Each user can share their own tasks folders with other users.

When creating a task you can define the task type. When displaying tasks the task types are indicated by icons.

You can combine particular types of tasks. You can, for example, create a private task that is repeated several times.

6.2.3. What is the purpose of the tasks folders?

Tasks folders let you structure tasks. Each tasks folder in the folder tree represents a collection of tasks. You can select a collection of tasks by clicking a tasks folder in the folder tree.

You can recognize a tasks folder in the folder tree by the icon 🗒.

There are the following types of tasks folders:

▪ Personal tasks folders. These tasks folders are located in the folder tree below your root folder. The standard personal tasks folder is called **Tasks**. You can create additional personal tasks folders.

▪ Public tasks folders. These tasks folders are located in the folder tree below the folder **Public folders**. Each user can create public folders. By default Public folders are visible to all users.

▪ Shared tasks folders. These tasks folders are located in the folder tree below the folder **Shared folders**. A user can share personal tasks folders with other users.

Information on managing folders can be found in 8.5: Folder Management. Information on sharing folders can be found in 8.6: Permission management.

6.3. The tasks module interface

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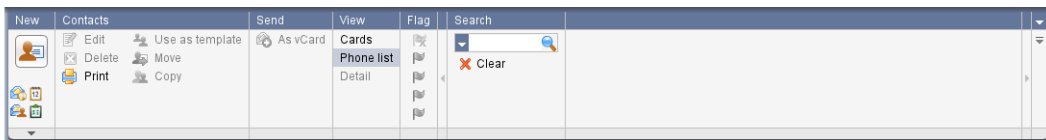
The tasks panel contains the following functions in different panel sections:

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

6.3.2. 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	**Options** button ▾	Changes to the tasks settings.
3	Content area	Displays the tasks. In the **View** panel section you can select a view.

6.4. Viewing tasks

In order to display tasks you have to do the following:

- Select a tasks folder.

- Select a view. The view defines the display of the tasks in the content area.

6.4.1. Displaying the List view

The List view displays the tasks in the form of a table.

How to display tasks as a list:

1. Select a tasks folder in the folder tree.

2. In the **View** panel section click on **List**.

Result: The tasks are displayed as a list.

For each task a line with information in the form of icons or text is displayed in the list:

Column	Information
Column 1, icon 📋	The entry is a task
Column 1, icon 📑	The entry is a serial task
Column 2, icon 🔑	The entry is a private task
Subject column	The task's description
Priority column	The task's priority. The 3 levels of importance are indicated by different icons
Starts at column	The task's start date
Due date column	The task's due date
% finished column	The task's progress
Flag column	The flag assigned to the task

The list shows the following peculiarities:

- Finished tasks are displayed in a pale color and are crossed out.

- If the due date has passed the date is displayed in red.

- By default the list is sorted by the **Due date** column. The column title is highlighted and arrow icon next to the column title indicates the sort order.

How to change the sort order:

1. To sort by a column click on the column title.

2. To change the sort order, click on the column title again.

Result: The sort order is changed.

Note: The first column cannot be used for sorting.

6.4.2. Displaying the H split view

In the H split view the upper part of the overview window displays a list view of the tasks and the lower part displays all details of the selected task.

How to display tasks in the H split view:

1. Select a tasks folder in the folder tree.

2. In the **View** panel section click on **H split**.
   Result: The overview window is split horizontally. The upper part displays a list view.

3. Select a task in the list view.

Result: The lower part of the overview window shows the following information for the selected task.

- The **Overview** tab contains the following information:

  □ Subject, due date, status, priority, progress, and task creator.

  □ Details like duration, costs, distance, billing information, companies, and reminders.
    Tip: With the **-** or **+** icon you can open or close the details page.

  □ Comments for the task below the task details.

- The **Participants** tab contains the names of the participants involved in the task.

- The **Attachments** tab contains the list of task attachments.

Tip: You can move the horizontal separator between the upper and lower parts.

6.4.3. Displaying hovers

Hovers are available in the H split and List view.

How to display a task in the hover:

1. Let the mouse pointer hover over a task. After a short delay the hover will open. The **General** tab is displayed.

2. To view further information click on another tab.

3. To close the hover move the mouse pointer out of the hover.

A task's hover shows the following information:

- The **General** tab. It contains:
  - The tasks module icon.
  - The subject and progress for the task.
  - The icons for private task, serial task, and for the task's priority.
  - The task's start and due date.
  - The comments for the task. Depending on the comment's length, the hover only displays the first lines. When clicking on the text, further lines are displayed. A second click switches back to the original view.

- The **Participants** tab. The number in brackets displays the number of participants. The tab contains:
  - The names and the confirmation status of the participants. If a participant accepted the name of the participant is displayed in green letters. If the participant declined the name is displayed in red letters.
  - The icons for changing the confirmation status.

- The **Attachments** tab. The number in brackets relate to the number of attachments. If the task contains attachments, the following elements are displayed for each attachment:
  - File name, file size, and attachment type.
  - Icons for opening and saving the attachment.

6.4.4. Opening or saving attachments

You can do the following:

- Open an attachment.
  Note: To open an attachment you might need additional software.

- Save an attachment outside of the groupware.

- Save an attachment in the InfoStore.

How to open or save a task's attachment:

1. Open the task in the H split view.

2. Open the **Attachments** tab.

3. Select the attachment.

4. If you want to open the attachment:

   In the **Attachment** panel section click **Open**. A system window opens. It displays the software used for opening the attachment.

   Use the system window's control elements for opening the attachment.

5. If you want to save the attachment:

   In the **Attachment** panel section click on **Save**. A system window opens.

   Use the system window's control elements for saving the attachment.

6. If you want to save the attachment in the InfoStore:

   In the **Attachment** panel section click on **Save in InfoStore**. The **InfoStore item** window opens. The file name for the attachment is entered as the file name for the InfoStore item.

   Information on creating InfoStore items can be found in 7.5: Creating an InfoStore item.

Tip: You can also open or save an attachment by using the respective icons in the task's hover.

6.5. Creating tasks

Here you can find an overview of how to create a new task. More details can be found on the next page.

Note: If you want to create a new task in a public or shared folder you need to have the permission to create objects in this folder.

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. See 6.5.1: Defining a start and due date for a task

6. Set the task reminder. See 6.5.2: Setting or replying to a task reminder

7. If requested use additional options:

   Mark the task as private. See 6.5.5: Marking tasks as private

   Create a task series. See 6.5.3: Creating a serial task

   Add tags to the task. See 6.5.4: Adding tags

   Set the details for the task. See 6.5.6: Adding task details

   Add further participants to the task. See 6.5.7: Adding participants

   Add attachments to the task. See 6.5.8: Adding attachments

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**.

If you want to cancel the action click on **Cancel** in the **Window** panel section.

There are the following possibilities for creating a new task:

   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.

6.5.1. Defining a start and due date for a task

To define the start and due date for a task, use the control elements next to **Start date** and **Due date** in the **Task** window.

How to define the task's due and start date in the Task window:

1. Open the **Task** tab.

2. Use one of the following methods to set the task's due date:

Enter a valid date in the input field next to **Due date**.

Click the calendar icon next to **Due date**. A calendar opens where you can pick a date.

3. Use one of the following methods to set the task's start date:

Enter a valid date in the input field next to **Start date**.

Click the calendar icon next to **Start date**. A calendar opens where you can pick a date.

6.5.2. Setting or replying to a task reminder

If you want to be reminded of the task before the due date you can define when you want to be reminded. A reminder window will alert you of this task when the end of the selected period has been reached.

How to set a task reminder in the Task window:

1. Open the **Task** tab.

2. Use one of the following methods to set a date for the task reminder:

Enter a valid date in the input field next to **Remind me**.

Click the calendar icon next to **Remind me**. A calendar opens where you can pick a date.

3. Use one of the following methods to set a time for the task reminder:

Enter a valid time in the input field next to the reminder date.

Select a time from the drop-down menu next to the reminder date.

As soon as the end of the selected period is reached the **Reminder** window opens. There are several possibilities for replying to this task reminder.

How to reply to a task reminder:

If you want to be reminded again, select a time interval from the drop-down menu in the lower left part of the window. Click **Remind me again**. When the end of the selected interval is reached you will be reminded again.

If you do not want to be reminded again click **OK**.

6.5.3. Creating a serial task

A serial task is a task that is repeated several times. When creating a serial task you have to set the following:

- The time interval for the serial task. This defines the time interval between the individual tasks of the serial task.

- The time range of the serial task. This defines the start and end of the serial task.

How to create a serial task in the Task window:

1. Open the **Task** tab.

2. Click the **Series** button. The **Create new series** window opens.

3. Define the time interval for the serial task.

    If the task is to be repeated daily, activate the serial type **Daily**. In the serial options define the interval in days.

    If the task is to be repeated weekly, activate the serial type **Weekly**. In the serial options define the interval in weeks and set the week day.

    If the task is to be repeated monthly, activate the serial type **Monthly**. In the serial options define the interval in months and set the day of the month.

    If the task is to be repeated yearly, activate the serial type **Yearly**. In the serial options define the day of the year.

4. Define the time range of the serial task:

    Next to **Start date** set the start of the serial task.

    Next to **Ends** set the end of the serial task.

5. Click **OK**.

6.5.4. Adding tags

A tag is text that can be used as criterion for structuring tasks. There are two possibilities for adding tags:

- Add tags in the input field next to the Tags button.

- Select tags from a list of predefined tags.

How to add predefined tags in the Tasks window:

1. Open the **Tasks** tab.

2. Click the **Tags** button.

3. In the **Select tags** dialog window select one or several tags. Click **OK**.

Result: The tags are entered in the input field.

Note: Prior to being able to select tags from a list, you have to define the tags in the groupware settings. Further information can be found in 8.2.3: Tags.

Tip: To delete a tag you have to edit the input field.

6.5.5. Marking tasks as private

A private task is a task that is not visible to other participants if you share your tasks folder with other participants.

You can mark a task as private if all of the following conditions are met:

▪ You are the sole participant in the task.

▪ The task is created in a personal tasks folder.

How to mark a task as private in the Task window:

1. Open the **Task** tab.

2. Activate the **Private task** checkbox.

6.5.6. Adding task details

You can add details to a task, for example, costs, duration, and billing information.

How to add details to a task in the Task window:

1. Open the **Details** tab.

2. Enter appropriate values.

Result: The details are added to the task.

6.5.7. Adding participants

When creating a task you can add additional participants.

How to add additional participants in the Task window:

1. Open the **Participants** tab.

2. In the **Participants** panel section click **Add**. The **Select participants** window opens.

3. If you want to select a different address book than the global address book, click the **Contact folder** button. Click on a folder in the **Select contact folder** window.

4. If you want to display a particular selection of participants or resources, enter a character string in the input field next to **Search**. Click the **Search** button.

5. Select one or several participants from the list.

6. To add the selection click the **Add** button next to Participants.

7. If requested you can correct the participants selection:

Select single entries in the **Participants** field.

Click the **Delete** button next to **Participants**.

8. To accept the selection click **OK**. If you do not want to accept the selection click **Cancel**.

Result: The participants are added to the task.

6.5.7.1. Notifying participants by E-Mail

Participants who have been added to a task will receive a task notification with the possibility to accept or decline the task. Further information can be found in 6.6.1: Confirming a task.

External participants will not receive a task notification. To inform external participants about a task you can see that all participants will be notified about the task by E-Mail.

How to notify all participants by E-Mail in the Task window:

1. Open the **Task** tab.

2. Activate the **Notify all participants by E-Mail** checkbox.

6.5.8. Adding attachments

How to add attachments in the Task window:

1. Open the **Attachments** tab.

2. In the **Attachment** panel section click **Add attachment**. The **Select attachments** dialog window opens.

3. In the **Select attachments** dialog window click **Browse**. Select the file to be added as an attachment. Close the file selection dialog window.

4. In the **Select attachments** dialog window click **Add**. The file is entered in the list field.

5. If you want to add further attachments repeat steps 3 – 4.

6. If you want to remove an attachment select the attachment in the list field, then click **Remove**.

7. In the **Select attachments** dialog window click **OK**.

Result: The attachments are added to the task.

6.6. Replying to a task invitation

If a groupware user adds you as a participant to a task, you will be notified about the task in the **Select confirmation** pop-up window. In the pop-up window you can confirm the task invitation. Depending on your confirmation the respective status is displayed in the task's H split view.

6.6.1. Confirming a task

As long as you do not confirm the task your status remains set to **Waiting**.

How to confirm a task in the Select confirmation pop-up window:

If you want to accept the invitation click on **Accept**. Your status is set to **Accepted**.

If you want to refuse the invitation click on **Refuse**. Your status is set to **Refused**.

If you want to temporarily accept the invitation click on **Tentative**. Your status is set to **Tentative**.

If you want to decide later click on **Later**. Your status remains set to **Waiting**. You are frequently reminded that you have to confirm the task.

If there are multiple tasks to be confirmed when logging in, the tasks are displayed in the **Select confirmation** window.

How to confirm several tasks in the Select confirmation pop-up window that is shown after login:

1. Click on a task.

2. You can enter a comment in the **Comment** input field.

3. Click on **Accept**, **Decline**, **Tentative**, or **Later**.

4. Repeat steps 1-4 for the remaining tasks.

Tip: In order to answer all tasks in the same way, activate the **All** checkbox. Then click **Accept**, **Decline**, **Tentative**, or **Later**.

6.6.2. Changing a task confirmation

You can change your confirmation for a task invitation any time.

How to change your task confirmation:

1. Open the task in the H split view.

2. In the **Confirmation** panel section click **Change**. The **Select confirmation** window opens.

3. Click one of the buttons **Accept**, **Decline**, **Tentative**, or **Later**.

Result: Your confirmation status is changed.

If you do not want to change the confirmation click the **Close** button in the upper right part of the window.

Tip: In the List or H split view you can also use the context menu to change the confirmation.

6.7. Managing tasks

6.7.1. Searching for tasks

By entering a search term you can find tasks in the currently open calendar folder. The search term defines the character string to be searched for.

All tasks with a title containing the search term will be found.

Example: To find tasks with the subject "Create presentation" and "Collect info for presentation" use the search term "pre".

How to search for a task:

1. In the folder tree select the tasks folder to be searched.

2. Select the List or H split view.

3. In the **Search** panel section enter the search term in the input field.

    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. In the **Search** panel section click the **Search** 🔍 icon.

Result: The overview window only displays the tasks that match the search term.

How to display all tasks in the selected tasks folder:

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

6.7.2. Editing tasks

The data entered when creating a task can be edited later.

Note: If you want to edit a task in a public or shared tasks folder you need to have edit permissions for the objects in those tasks folders.

How to edit a task:

1. Select a task in the list or H split view.

2. In the **Task** panel section click on **Edit**. The **Task** window opens.

3. Edit the task's data. A comprehensive description of the data can be found in 6.5: Creating tasks. Instructions for changing the edit status can be found in 6.7.2.1: Changing the editing status.

4. In the panel click the **Save** icon. The window will be closed.

Result: The task is changed.

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

Tip: In the List or H split view you can also edit a task in the context menu or by double-clicking on a task.

6.7.2.1. Changing the editing status

When creating a new task the editing status is set to the following values:

- The **Status** is set to **Not started**.

- The value for **% done** is set to **0**.

The entries in the **Status** selection field and in the **% done** input field depend on each other.

- The statuses **Not started**, **Waiting**, and **Deferred** correspond to the value **0 % done**.
- The status **In progress** corresponds to a value between **1% done** and **99 % done**.
- The status **Done** corresponds to the value **100 % done**.

How to change the editing status in the Task window:

Do one of the following actions:

Select an editing status in the **Status** selection field.

Enter an integer between 0 and 100 in the **% done** field.

Select a value for the **% done** field by clicking the **-** or **+** icons.

Result: The editing status is changed. Participants are notified about the change. Completed tasks are crossed out in the List or H split view.

6.7.3. Setting tasks to done

Note: If you want to set a task in a public or shared folder to done, you need to have edit permissions for the objects in those tasks folders.

How to set a task status to done:

1. Select one or several tasks in the List or H split view.

2. In the **Task** panel section click **Mark as done**.

Result: The tasks are displayed as done.

Tip: You can also use the context menu to mark tasks as done.

6.7.4. Printing tasks

There are the following possibilities for printing tasks:

- Printing a tasks list
- Printing the details of a task

How to print a tasks list:

1. Select the List view in the panel.

2. Select the tasks to be printed:

   If you want to print only a part of the tasks in the List view, select the tasks to be printed.

   If you want to print all of the tasks in the List view, either select all tasks or none.

3. In the **Tasks** panel section click **Print**. A new window with the print preview and the **Print** system window open.

4. If need be, change the print settings in the system window.

5. In the system window click **Print**.

Result: The tasks list is printed.

How to print the details of a task:

1. Open a task in the H split view.

2. In the Tasks panel section click **Print**. A new window with the print preview and the **Print** system window open.

3. If need be, change the print settings in the system window.

4. In the system window click **Print**.

Result: The details of the task are printed.

6.7.5. Moving tasks

There are the following possibilities for moving tasks:

- With the panel function
- With drag & drop

Note: When moving tasks from a source to a target folder you need to have the following permissions:

- Delete permission for the objects in the source folder
- Folder permission for creating objects in the target folder

How to move tasks by using the panel function:

1. Select one or several tasks in the List or in the H split view.

2. In the **Tasks** panel section click **Move**. The **Select folder** window opens.

3. Click on a tasks folder in the **Select folder** window. You can only click on folders that you can move tasks to.

Result: The tasks are moved.

How to move tasks with drag & drop:

1. Select one or several tasks in the List or H split view.

2. Drag a selected task to a target folder. An icon next to the mouse pointer indicates the following:

   When dragging to a valid target a green tick is displayed.

   When dragging to an invalid target a red prohibit icon is displayed.

3. Release the mouse button over the target folder.

Result: The tasks are moved.

6.7.6. Marking tasks with flags

Flags are colored labels for marking tasks. You can decide upon the meaning of the single colors. The flags are displayed in the last column of the List or H split view.

How to mark tasks with flags:

1. Select one or several tasks in the List or H split view.

2. In the **Flags** panel section click on any flag except the first one.

Result: The selected tasks are marked with flags.

How to delete flags:

1. In the List or H split view select tasks that are marked with flags.

2. Click on the first flag in the **Flags** panel section.

Result: The flags are deleted.

6.7.7. Deleting tasks

Warning: If you are a participant in a task you can delete the task even if you are not the task's creator. If you delete the task it will be deleted for all other participants as well. This is true even if you do not have permissions for the task's folder.

Warning: Deleted tasks can not be restored. Prior to deleting a task, make sure you no longer need the task.

How to delete one or several tasks:

1. Select one or several tasks in the List or H split view.

2. In the **Task** panel section click **Delete**. The **Delete task** window opens.

3. If you are sure you want to delete the task click **Yes**.

Result: The tasks are permanently deleted.

Tip: You can also use the context menu or the <del> key to delete tasks.

Chapter 7. InfoStore module

7.1. Overview

Use one of the following methods to open the **InfoStore** module:

In the module bar 🏠 👥 📅 👤 📋 📦 ❄ click the **InfoStore** 📦 icon.

On the start page click on the title bar of the **InfoStore** module window.

In the folder tree click on any InfoStore folder below **InfoStore**.

The **InfoStore** module:
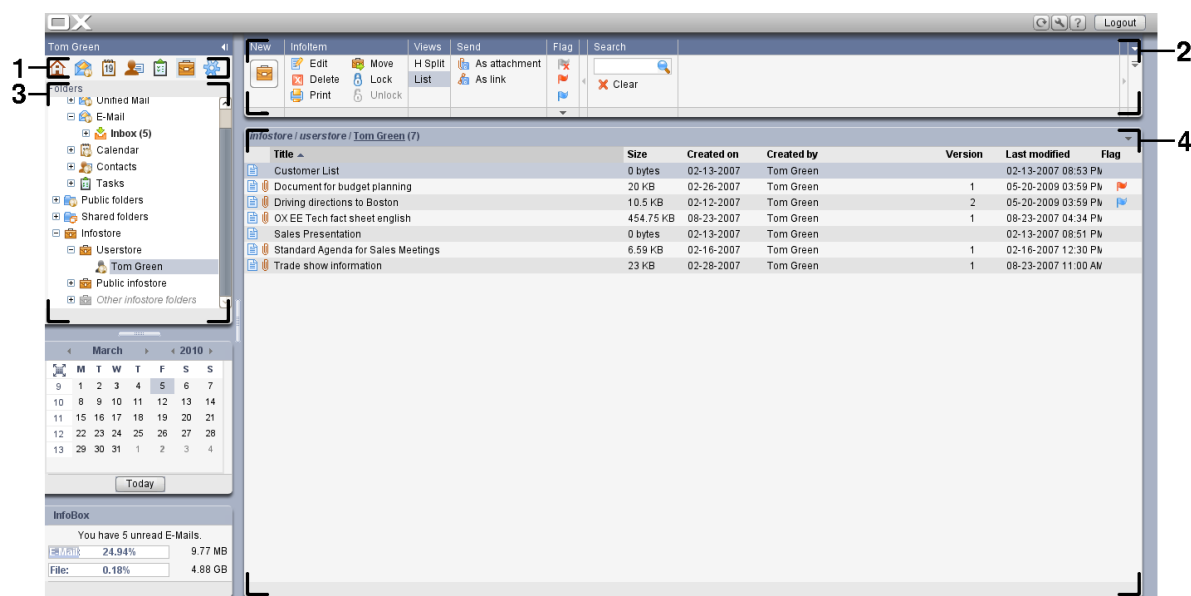
The module contains the following elements:

No.	Element	Function
1	Module bar	Contains icons for opening the modules. The **InfoStore** icon 📦 is selected.
2	Panel	Contains the functions available in the InfoStore module, please refer to 7.3.1: The InfoStore panel.
3	Folder tree	Shows the personal InfoStore folders. Please refer to 7.2.3: What is the purpose of InfoStore folders?.
4	Overview window	Shows the contents of the selected InfoStore folder. Please refer to 7.3.2: The InfoStore overview window.

7.2. What you should know

7.2.1. What is the purpose of the InfoStore module?

In the **InfoStore** module you can store and view information saved as InfoStore entries. You can

- display InfoStore entries,
- create InfoStore entries,
- and manage InfoStore entries.

7.2.2. What should I know about InfoStore entries?

An InfoStore entry contains information on a certain topic. This might include the following:

- Text information in the form of a comment.
- A link (bookmark) to an Internet address.
- An attached document. There can be several versions of the attached document.

7.2.3. What is the purpose of InfoStore folders?

InfoStore folders allow you to sort InfoStore entries in the same way as documents are sorted in folders on your disk.

An InfoStore folder in the folder tree can be identified by the icon.

All InfoStore folders are located in the folder tree below **InfoStore**. There are the following types of InfoStore folders:

- Personal InfoStore folders. The personal InfoStore folders are named after your username. It is located in the folder tree below **InfoStore/Userstore**. You can create additional InfoStore folders in your personal InfoStore folder.
- Public InfoStore folder. These InfoStore folders are located in the folder tree below **InfoStore/Public InfoStore**. Each user can create public InfoStore folders. By default public InfoStore folders are visible to all users.
- Shared InfoStore folders. These InfoStore folders are named after the respective user. The folders are located in the folder tree below **InfoStore/Userstore**. Each user can share personal InfoStore folders with other users.

Information on managing folders can be found in 8.5: Folder Management, and information on sharing folders can be found in 8.6: Permission management.

7.3. The InfoStore module interface

7.3.1. 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

7.3.2. The InfoStore overview window

The InfoStore overview window, **List** view:
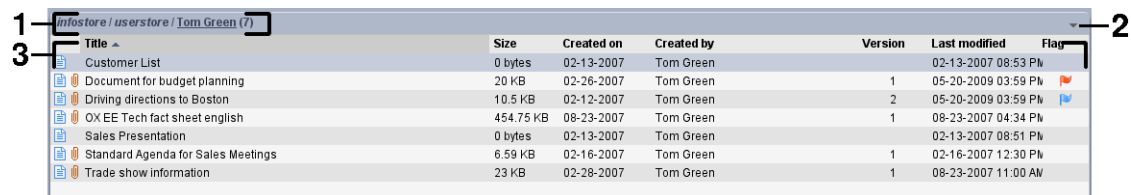
The InfoStore overview window contains the following elements:

№	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.

7.4. Viewing InfoStore items

In order to display InfoStore entries proceed as follows:

▪ Select an InfoStore folder.

▪ Select a view. The view defines how the InfoStore entries are displayed in the content area.

7.4.1. Displaying the list view

The list view displays the InfoStore entries in the form of a table.

How to display InfoStore entries as a list:

1. Select an InfoStore folder in the folder tree.

2. In the **View** panel section click on **List**.

Result: The InfoStore entries are displayed as a list.

For each InfoStore entry the list shows one line with information in the form of icons or text:

Column	Information
Column 1, icon 📄	The entry is an InfoStore entry.
Column 1, icon 📄	The InfoStore entry is locked.
Column 2, icon 📎	The InfoStore entry contains a document. In order to open or save the current document version click the icon. Details can be found in 7.4.4: Opening or saving the current document version.
Title column	The title of the InfoStore entry.
Size column	The file size of the InfoStore entry.
Created on column	The creation date.
Created by column	The name of the creator.
Version column	The current version of the InfoStore entry.
Last modified column	The date of the last change.
Flag column	The flag assigned to the InfoStore entry.

The InfoStore entries are by default sorted by the **Title** column in ascending order. The column title is highlighted. An arrow icon next to the column title indicates the sort order.

How to change the sort order:

1. To sort by a column click on the column title.

2. To change the sort order, click on the column title again.

Result: The sort order is changed.

Note: The first two columns can not be used for sorting.

7.4.2. Displaying the H split view

In the H Split view the overview window displays the content of the selected InfoStore entry below the list of InfoStore entries.

How to display InfoStore entries in the H Split view:

1. Select an InfoStore folder in the folder tree.

2. In the **View** panel section click **H split**.
   Result: The overview window is split horizontally. The upper part displays the list view.

3. Select an InfoStore entry in the list view.

Result: The lower part of the overview window displays the following information about the selected InfoStore entry:

- The **Overview** tab contains the following details:

  - Title, Document, Folder name, and Link/URL
    The document name serves as a link to the current version of the attached document in order to open or download it. Further information can be found in 7.4.4: Opening or saving the current document version.

  - The document details file size, document type, locking, MD5 sum
    Tip: By clicking the **-** or the **+** icon you can open or close the details.

  - Comments on the InfoStore entry below the details

- The **Versions** tab contains a list of the versions of the attached document. The view below the list contains detailed information about a version. The view contains a link that allows you to open or download the selected version of the attached document. Further information can be found in 7.6.2.3: Working with document versions.

- The lower part of the overview window displays

  - the creator and the creation date of the InfoStore entry,

  - the modifier and the modification date of the InfoStore entry.

Tip: You can move the horizontal separator between the upper and lower part.

7.4.3. Displaying hovers

Hovers are available in the H Split and List view.

How to display an InfoStore entry in the hover:

1. Move the mouse pointer to an InfoStore entry. The hover opens after a short delay. It displays the **General** tab.

2. In order to view additional information click on another tab.

3. In order to close the hover move the mouse pointer out of the hover.

The hover for an InfoStore entry displays the following information:

- The **General** tab. It contains:
  - The InfoStore module icon.
  - The title and the creator of the InfoStore entry.
  - If the InfoStore entry contains documents the version number, the file type icon, and the file name of the InfoStore entry document are displayed.
  - The icons for opening and saving the document.
  - The comments for the InfoStore entry. Depending on the length of the comment text, the hover only displays the first lines. When clicking on the text further lines are displayed. A second click switches back to the original view.

- The **Versions** tab. The number in brackets correlates to the number of document versions. If the InfoStore entry contains a document the following elements are displayed:
  - The plus and minus buttons for displaying or hiding details on the document versions.
  - Version number, file type icon, and file names of the documents.
  - Icons for opening and saving the document versions.

7.4.4. Opening or saving the current document version

An InfoStore entry can contain a document with several versions. If this is the case you can perform the following actions:

- Open the current document version.

  Note: In order to open a document you might need to install additional software.

- Save the current document version.

How to open or save the other versions is described in 7.6.2.3: Working with document versions.

How to open or save the current document version:

1. Open the InfoStore entry in the H Split view. Switch to the **Overview** tab.

2. Click on the document name next to **Document**. A system window opens. It shows the software used for opening the document.

   Note: The design of the system window can vary, depending on the browser.

3. Decide on an action:

   If you want to open the document, select **Open with**.
   Note: In order to open the document you might need to install additional software.

   In order to save the document outside of the groupware, select **Save to disk**.

4. In the system window click **OK**.

Tip: Alternatively you can use one of the following methods:

   Use the respective icons in the hover of the InfoStore entry.

   In a list view click the icon 📎.

7.4.5. Sending an InfoStore entry

In order to send an InfoStore entry to other users, choose from one of the following possibilities:

- If the InfoStore entry contains a document, you can send the document as an E-Mail attachment to any E-Mail address.

- You can send the InfoStore entry as a link to internal groupware users.

How to send the document of an InfoStore entry as an E-Mail attachment:

1. Open the InfoStore entry in the H Split view.

2. In the **Send** panel section click **As attachment**.

Result: The **E-Mail** window opens. The current version of the document is entered as an E-Mail attachment.

How to send an InfoStore entry as a link:

1. Open the InfoStore entry in the H Split view.

2. In the **Send** panel section click **As link**.

Result: The **E-Mail** window opens. The direct link to the InfoStore entry is entered as E-Mail text.

Note: In order to follow the link, the recipient of the E-Mail needs to have read permission for the objects in the InfoStore folder containing the InfoStore entry. Information on how to set permissions can be found in 8.6: Permission management .

7.5. Creating an InfoStore item

Here you can find an overview of how to create a new InfoStore entry. Details can be found on the next page.

Note: If you want to create a new InfoStore entry in a public or shared folder you need to have the permission for creating objects in this folder.

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. See 7.5.1: Adding a document

    Add tags. See 7.5.2: Adding tags

    Add comments.

5. Click the **Save** icon in the panel. The window is closed.

Result: The InfoStore item is created.

If you want to cancel the process, click **Cancel** in the **Window** panel section.

In order to create a new InfoStore entry, choose one of the following methods:

    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.

7.5.1. Adding a document

You can add exactly one document to an InfoStore entry. The document contains the version number 1. If you add a further document, it will receive the next higher version number.

Further information on document versions can be found in 7.6.2.3: Working with document versions.

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.

If you want to cancel the process, click **Cancel** in the **Version comments** window.

Note: Depending on the document file size and your connection this process can take a while.

7.5.2. Adding tags

A tag is text that can be used as criterion for sorting InfoStore entries. There are the following possibilities for adding tags:

- Entering tags in the input field next to the tags button.

- Selecting tags from a list of predefined tags.

How to add predefined tags in the InfoStore Item window:

1. Click the **Tags** button.

2. In the **Select tasks** dialog window select one or several tags. Click **OK**.

Result: The tags are entered in the input field.

Note: Prior to being able to select tags from a list, you have to define the tags in the groupware settings. Details can be found in the options chapter of the user manual or the online help.

Tip: In order to delete a tag, edit the input field.

7.6. Managing InfoStore entries

7.6.1. Searching for InfoStore entries

Search terms let you find InfoStore entries in the current InfoStore folder. The search term defines the character string to be searched for.

All InfoStore entries containing the search term in their title will be found.

Example: In order to find the InfoStore entries with the titles "marketing editions" and "basics on marketing", use the search term "marketing".

How to search for an InfoStore entry:

1. In the folder tree select the InfoStore folder to be searched.

2. Open the H Split or List view.

3. In the **Search** panel section enter the search term in the input field.

   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. In the **Search** panel section click the **Search**🔍 icon.

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

How to display all InfoStore entries in the currently selected InfoStore folder:

Click **Reset** in the **Search** panel section.

7.6.2. Editing InfoStore entries

All the data entered when creating the InfoStore entry can be edited later.

Note: In order to be able to edit an InfoStore entry in a public or shared folder, you need to have edit permissions for the objects in the respective folder.

How to edit an InfoStore entry:

1. Select an InfoStore entry in the H Split or List view.

2. In the **InfoItem** panel section click on **Edit**. The **InfoStore item** window opens.

3. Edit the data for the InfoStore entry. A detailed description of the data can be found in 7.5: Creating an InfoStore item. Instructions for working with document versions can be found in 7.6.2.3: Working with document versions.

4. Click the **Save** icon in the panel. The window will be closed.

Result: The InfoStore entry is modified.

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

Tip: You can also use the context menu or double-click on an InfoStore entry to edit the entry.

7.6.2.1. Locking an InfoStore entry

If you edit an InfoStore entry you should lock the entry. The lock has the following purpose:

▪ The lock indicates to other users that the InfoStore entry is currently being worked on and might not be up-to-date.

- If the locked InfoStore entry is located in an InfoStore folder shared with other users who have modify rights, those other users cannot edit the locked InfoStore entry.

How to lock an InfoStore entry:

1. Select one or several InfoStore entries in the H Split or List view.

2. In the **InfoItem** panel section click **Lock**.

As soon as you have finished the modification you should unlock the entry.

How to unlock the entry:

1. Select one or several locked InfoStore entries in the H Split or List view.

2. In the **InfoItem** panel section click **Unlock**.

Tip: You can also activate the **Lock** and **Unlock** functions in the context menu.

7.6.2.2. Deleting a document

You can delete the document from an InfoStore entry. This deletes all document versions. Further information on working with document versions can be found in 7.6.2.3: Working with document versions.

Note: This function does not delete any documents from your local disk.

How to delete the document from an InfoStore entry:

1. Select an InfoStore entry in the H Split or List view.

2. In the **InfoItem** panel section click on **Edit**. The **InfoStore Item** window opens.

3. Click the **Delete** button. The **Remove file** window opens.

4. If you are sure you want to remove all file versions of the document from the InfoStore entry, click **Yes**.

Result: All file versions of the document are removed from the InfoStore entry. The InfoStore entry remains.

7.6.2.3. Working with document versions

If an InfoStore entry contains a document you can perform the following actions:

- Add a new document version
- Delete a document version
- Set a document version as the current version

How to add a new document version:

1. Select an InfoStore entry in the H Split or List view.

2. In the **InfoItem** panel section click **Edit**. The **InfoStore Item** window opens.

3. Click the **File** button.

4. Click the **Browse** button.

5. Select the file to be added as an attachment. Close the file selection dialog window.

6. Click the **Save** icon in the panel. The window will be closed.

7. If need be enter a comment in the **Version comment** pop-up window.

8. Click **OK** in the pop-up window. If you do not want to enter a comment, click **No comment**. To cancel the process, click **Cancel**.

Result: The document is transferred to the server. As soon as the process is finished, the **InfoStore Item** window is closed.

Note: Depending on the file size of the document and the connection's transfer rate, this process might take a while.

How to delete a document version from an InfoStore entry:

1. Open an InfoStore entry in the H split view.

2. Select the **Versions** tab.

3. Select a document version in the list pane.

4. In the **Version** panel section click **Delete**. The **Delete version** window opens.

5. If you are sure you want to delete the document version, click **Yes**.

Result: The document version is deleted from the InfoStore entry.

Note: This function does not delete any documents from your local disk.

How to set a document version as the current version:

1. Open an InfoStore entry in the H Split view.

2. Select the **Versions** tab.

3. Select a document version in the list pane.

4. Click on **Current** in the **Version** panel section.

Result: The selected document version is set as the current version.

7.6.3. Printing InfoStore entries

The following possibilities exist for printing InfoStore entries:

- Printing a list of InfoStore entries
- Printing the data for an InfoStore entry

How to print a list of InfoStore entries:

1. Open InfoStore entries in the List view.

2. Select the InfoStore entries to be printed:

   To only print some of the InfoStore entries, select the InfoStore entries that you want to print.

   To print all InfoStore entries in the list view, either select all InfoStore entries or none of the Info-Store entries.

3. In the **InfoItem** panel section click **Print**. A new window with the print preview and the **Print** system window open.

4. If need be, change the print settings in the system window.

5. In the system window click **Print**.

Result: The list of InfoStore entries is printed.

How to print the data for an InfoStore entry:

1. Open an InfoStore entry in the H Split view.

2. In the **InfoItem** panel section click **Print**. A new window with the print preview and the **Print** system window opens.

3. If need be, change the print settings in the system window.

4. In the system window click **Print**.

Result: The data from the InfoStore entry is printed.

7.6.4. Moving InfoStore entries

The following possibilities exist for moving InfoStore entries:

- With the panel function
- With drag & drop

Note: When moving InfoStore entries from a source to a target folder you need to have the following permissions:

- Delete rights for the objects in the source folder
- The folder right for creating objects in the target folder

How to move InfoStore entries by using the panel function:

1. Select one or several InfoStore entries in the H Split or List view.

2. In the **InfoItem** panel section click **Move**. The **Select folder** window opens.

3. Click on an InfoStore folder in the **Select folder** window. You can only click on folders where you can move InfoStore entries to.

Result: The InfoStore entries are moved.

If you want to cancel the process, click the **close** button in the upper right part of the **Select folder** window.

How to move InfoStore entries with drag and drop:

1. Select one or several InfoStore entries in the H Split or List view.

2. Drag a selected InfoStore entry to an InfoStore folder. An icon next to the mouse pointer indicates the following:

   When dragging to a valid target a green tick is displayed.

   When dragging to an invalid target a red prohibit icon is displayed.

3. Release the mouse button over the target folder.

Result: The InfoStore entries are moved.

If you want to cancel the process release the mouse key over an invalid target.

7.6.5. Marking InfoStore entries with flags

Flags are colored labels for marking InfoStore entries. You can decide upon the meaning of the individual colors.

In the H Split and List view the flags are displayed in the last column.

How to mark InfoStore entries with flags:

1. Select an InfoStore entry in the H Split or List view.

2. In the **Flags** panel section click on any flag but the first one.

Result: The selected InfoStore entries are marked with flags.

How to delete flags:

1. In the H Split or List view select InfoStore entries marked with flags.

2. Click on the first flag in the Flags panel section.

Result: The flags are deleted.

7.6.6. Deleting InfoStore entries

Warning: Deleted InfoStore entries can not be restored. Prior to deleting an InfoStore entry, make sure you no longer need the InfoStore entry.

Note: If you want to delete an InfoStore entry in a public or shared folder you need to have delete permission for the objects in these InfoStore folders.

How to delete one or several InfoStore entries:

1. Select one or several InfoStore entries in the H Split or List view.

2. In the **InfoStore Entry** panel section click **Delete**. The **Delete items** window opens.

3. If you are sure you want to delete the InfoStore entries click **Yes**.

Result: The InfoStore entries are permanently deleted.

Tip: You can also delete InfoStore entries by using the context menu or the <del> key.

7.6.7. Accessing InfoStore entries with WebDAV

With WebDAV you can access InfoStore entries in the same way as when accessing local files on your disk. Compared with the access from the Groupware GUI, WebDAV has advantages and disadvantages:

- The advantage is the quick and direct access with the browser or Explorer. You need not be logged in to the Groupware GUI.

- The disadvantage is that you can only see the current document version. The document's history and additional information, e.g. comments, are not displayed.

Warning: When you delete a file entry with WebDav, you will delete all file versions, not only the current version. In order to delete a specific document version, exclusively use the methods described in 7.6.2.3: Working with document versions.

Depending on the operating system installed on your machine, the WebDav access to the InfoStore is set up in a different way.

7.6.7.1. Accessing under Linux

How to access InfoStore entries with WebDAV under Linux:

1. Open KDE Konqueror or a similar browser.

2. Enter the following address in the **Location** field:
    webdav://<adress>/servlet/webdav.infostore
    where <address> needs to be replaced by the IP address or URL of the Open-Xchange server.

3. Enter your username and your password. Use your login data for the Open-Xchange server.

Result: The InfoStore entries are displayed in the browser.

7.6.7.2. Accessing under Windows XP

How to access InfoStore entries with WebDav under Windows XP:

1. Open My network places via the **Start** button in the lower left of your desktop or by double-clicking on **My Computer**.

2. Go to Network tasks, open the dialog window Network places and click on **Add a network place**. A wizard for adding network resources is launched. Click on **Next**..

3. In the next dialog window select **Choose another network place**.

4. Enter the following address:
   webdav://<adress>/servlet/webdav.infostore
   where <address> needs to be replaced by the IP address or URL of the Open-Xchange server.

5. Enter your username and your password. Use your login data for the Open-Xchange server.

6. In the next dialog window you can assign a name to the network resource.

   Note: If you have set your encoding to ISO, please do not use any special characters for file or folder names. The Open-Xchange server uses UTF-8 encoding.

7. In the next dialog window click on **Finish**.

Result: You can use the network place to access your InfoStore entries.

7.6.7.3. Accessing under Windows Vista

Before using WebDAV you have to install a Microsoft Software Update.

How to install the Microsoft Software Update for WebDAV:

1. Open a web browser.

2. Enter the following address: http://support.microsoft.com/kb/907306

3. Browse to **More Information** and click on **Download the Software Update for Web Folders package now**.

4. On the download page click on **Download**. The file Webfldrs-KB907306-ENU.exe will be downloaded.

5. Double-click on the file. The installation will be launched.

How to access InfoStore entries with WebDAV under Windows Vista:

1. In the Windows Explorer open **Computer**.

2. Right-click on a free area in the right pane of the Explorer. From the drop-down menu select **Add a Network Location**. The **Add network location** dialog window opens. Click on **Next**.

3. Select **Choose a custom network location**. Click on Next.

4. In the **Add network path** dialog window enter the following address:
   webdav://<adress>/servlet/webdav.infostore
   whereas <adress> has to be replaced by the Open-Xchange server's ip address or url.

5. Enter your username and password. Use your login data for the Open-Xchange server.

6. In the next dialog window you can assign a name to the resource.

7. In the next dialog window click on **Finish**.

Result: Below **Computer** you can access your InfoStore entries.

Kapitel 8. Options

8.1. Overview

In order to open the Options, click the
Configuration ✿ icon in the module bar 🏠 👤 📅 👥 📆 📧 ✿.

The **Options** module:
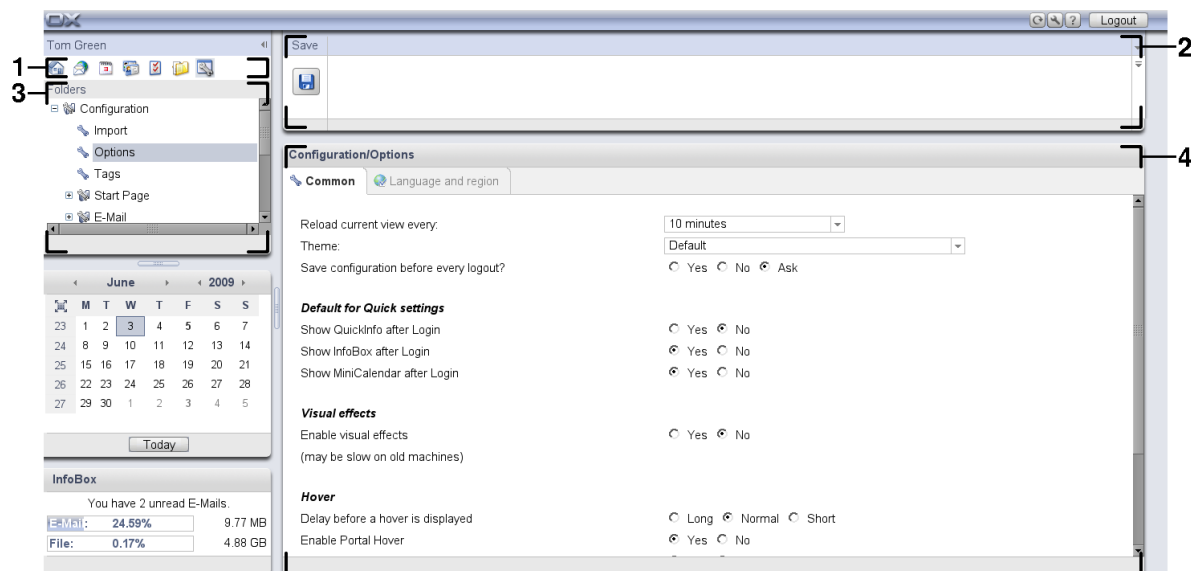
The module contains the following elements:

Nb	Element	Function
1	Module bar	Contains icons for opening the modules. The **Options** icon ✿ is selected.
2	Panel	Contains the functions that are available for the individual options. Depending on the option selected in the folder tree, the panel shows different functions.
3	Folder tree	Displays the settings available in the Options module.
4	Overview window	Here you can view and change the values for the selected option. To apply changes you normally also need the panel functions. Details about the values and instructions on how to apply settings can be found in the following sections.

The options include

- the settings in the groupware,
- the import of data into the groupware,
- the export of data from the groupware,
- the folder management for the groupware folders,
- the permission management for the folders.
- Publish&Subscribe.

8.2. Settings

8.2.1. What can be set?

You can set the following:

- The general configuration for the groupware
- Tags
- The configuration for the individual modules

8.2.2. General configuration

How to change the general settings for the complete groupware:

1. Click the **Settings** icon ❄ in the module bar 🏠 📧 📅 📇 📋 📁 ❄.

2. Click **Options** in the folder tree below **Settings**. The settings options are displayed in the overview window.

3. Choose the necessary settings. A description of the settings can be found later in this chapter.

4. To save the settings click the **Save** icon in the panel.

Result: The settings are saved.

How to leave the general settings page:

Click another button in the module bar.

Note: If you leave the settings before having saved the **Configuration changed** pop-up window opens:

If you want to save the settings click **Yes**.

If you do not want to save click **No**.

The following general settings are available.

Common tab

Instructions for changing the settings can be found above in 8.2.2: General configuration.

- Basic settings

  - **Reload current view every .**
    Defines the interval for retrieving new E-Mails, appointments, tasks, etc. from the server. The default setting is **5 minutes**.

  - **Theme .**
    Defines the color scheme for the groupware interface.

  - **Save configuration before every logout? .**
    Defines whether the current configuration is saved after logging out.

  - **Default module after login.**
    Defines the module to be opened by default after the login.

- Default for quick settings

  - **Show QuickInfo after Login .**
    Defines whether the quick info is activated in the panel by default.

  - **Show InfoBox after Login .**
    Defines whether the InfoBox below the MiniCalendar is displayed by default.

  - **Show MiniCalendar after Login .**
    Defines whether the MiniCalendar is displayed by default.

- Visual effects
  The visual effects comprise the fading in and fading out of context menus in the folder tree and the Button-down effect when activating a panel function.

  - **Enable visual effects .**
    Activates or deactivates the visual effects. Depending on the performance of your computer it might be better to deactivate the visual effects.

- Hovers

  - **Delay before a hover is displayed .**
    Allows setting the delay for showing a hover on mouse-over.

  - **Enabling module hovers.**
    The settings

      Enable Portal Hover

      Enable Calendar Hover

      Enable Contacts Hover

      Enable Tasks Hover

      Enable E-Mail Hover

      Enable InfoStore Hover
    activates or deactivates the hovers in the individual modules.

  - **Enable all .**
    Activates the hovers for all modules.

  - **Disable all .**
    Deactivates the hovers for all modules.

  Tip: You can also activate or deactivate the module hovers in the settings for the individual modules.

Language and region tab

Instructions for changing the settings can be found above in 8.2.2: General configuration.

- **Language .**
  Defines the groupware language. Defines the date format and time format settings.

- **Time zone .**
  Sets the time zone. All time-bound entries in the groupware refer to the current time zone. While on business you can set the time zone you are currently in.

- **Time format.**

  - **Example**
    Shows how the time is displayed in the currently selected time format.

  - **Predefined**
    Automatically selects 12 hour format or 24 hour format, according to the language setting.

  - **User defined**
    Enables the user to select the 12 hour or 24 hour time format.

- **Date format.**

  - **Example**
    Shows how the date is displayed in the currently selected date format.

  - **Predefined**
    Automatically selects the day, month, and year format and the separator, according to the language setting.

  - **User defined**
    Enables the user to customize the day, month, and year format and the separator.

8.2.3. Tags

Tags are categories that can be assigned to contacts, tasks, and InfoStore entries. Tags can help you to sort items.

Tags can be

- created,

- edited,

- and deleted.

How to open the tags functions:

1. In the module bar ⌂ 🏠 📅 📇 📋 📧 ⚙ click the **Configuration** icon ⚙.

2. In the folder tree click on the **Configuration** subfolder **Tags**.

Result: The tags functions are displayed in the panel. The overview window displays the existing tags.

How to create a new tag:

1. In the **Tags** panel section click on **Add**. The **Tags** dialog window opens.

2. Enter a name for the new tag.

3. In the dialog window click **OK**.

4. In the panel click **Save**.

Result: The new tag is displayed in the overview window.

How to edit a tag:

1. Select a tag in the overview window.

2. In the **Tags** panel section click **Edit**. The **Tags** dialog window opens.

3. Change the name of the tag.

4. In the dialog window click **OK**.

5. In the panel click **Save**.

Result: The tag is changed.

How to delete a tag:

1. Select a tag in the overview window.

2. In the **Tags** panel section click **Remove**.

3. In the panel click **Save**.

Result: The tag is deleted.

How to leave the tags functions:

Click another button in the module bar.

8.2.4. Configuring the start page

Configuring the start page includes

- the layout of the start page,

- the UWA modules.

8.2.4.1. Start page layout

The start page layout includes

- the module window display,

- the start page hovers.

How to configure the start page layout

1. In the module bar 🏠 👤 🗓 🖥 📋 📧 ⚙ click the **Configuration** icon ⚙.

2. In the folder tree click on **Start page**.

3. Click on the **Start page** subfolder **Layout**. The overview window displays the possible settings.

4. Apply the wanted settings. A description of the settings can be found further below in this chapter.

5. To save the settings click on the panel entry **Save**.

Result: The settings are saved.

How to leave the start page settings:

Click another button in the module bar.

Note: When leaving the settings without having saved, a pop-up window opens: **Configuration changed**:

If you want to save the settings click on **Yes**.

If you do not want to save, click **No**.

The following settings are available.

- **E-Mail.**
  Defines the maximum number of unread E-Mail messages displayed in the E-Mail module window. The **Hide** options hides the module window.

- **Later appointments.**
  Defines the maximum number of later appointments displayed in the Calendar module window. Appointments taking place in the current or following week are always displayed. The **Hide module window** option hides the module window.

- **Later tasks.**
  Defines the maximum number of later tasks displayed in the tasks module window. Tasks taking place in the current or following week are always displayed. The **Hide module window** option hides the module window.

- **InfoStore.**
  Defines the maximum number of new InfoStore entries displayed in the InfoStore module window. The **Hide module window** option hides the module window.

- **Enable start page hovers.**
  Enables or disables the start page hovers.

8.2.4.2. UWA modules

UWA-Modules for the start page can be

- added,

- edited,

- removed,

- enabled, or disabled.

The start page only displays UWA modules that are enabled.

How to add a UWA module:

1. In the folder tree click on the **Start Page** subfolder **UWA Modules**.

2. In the **UWA Modules** panel section click **Add**. The UWA Modules dialog window opens.

3. Enter a name in the **Name** input field. The name is then used as the title in the UWA module window.

4. Activate the **Autorefresh** checkbox. This setting is recommended as the content of many UWA modules changes frequently.

5. In the **URI** input field enter the address of the UWA module. Sample addresses can be found on the Open-Xchange website under
   Interesting UWA Modules [http://www.open-xchange.com/index.php?id=361&L=1].

6. When having entered a URI pointing to an address on your local network, activate **Use standalone mode**. If you are unsure contact your administrator.

7. If a UWA module requires parameters, enter those in the **Parameters** input field. The parameters needed for a UWA module can also be found in the table mentioned above. **Tip:** Copy the parameters from the table to the input field.

8. Close the dialog window with **OK**. The new UWA module is entered in the Available UWA modules list and is activated.

9. Click on the panel entry **Save**.

Result: The new UWA module is visible on the overview window of the start page.

How to change the settings of a UWA module:

1. Select the module in the **Available UWA modules:** list.

2. In the **UWA Modules** panel section click **Edit**.

3. Change the settings in the UWA Modules dialog window.

4. Close the dialog window by clicking **OK**.

5. Click on the panel entry **Save**.

Result: The UWA module settings are changed.

How to delete a UWA module:

1. Select the module in the **Available UWA modules:** list.

2. In the **UWA modules** panel section click **Remove**.

3. In the Delete UWA modules dialog window click **Yes**.

4. Click on the panel entry **Save**.

Result: The UWA module was deleted.

How to enable or disable a UWA module:

1. Select the module in the list **Available UWA modules:**.

2. In the **Visibility** panel section click **Enable** or **Disable**.

3. Click on the panel entry **Save**.

Tip: With a multiple selection you can delete, enable or disable several UWA modules at once.

How to leave the UWA module functions:

Click another button in the module bar.

8.2.5. Configuring the E-Mail module

The E-Mail configuration includes:

- E-Mail settings
- Signatures
- E-Mail filter
- absent notification

8.2.5.1. E-Mail settings

How to configure the E-Mail settings:

1. In the module bar 🏠 👥 📅 📇 📋 📦 ⚙ click the **Configure** icon ⚙.

2. Click on **E-Mail** in the folder tree.

3. In the folder tree click the **E-Mail** subfolder **Preferences**. The overview window displays the available settings.

4. Configure the settings in the tabs **Common**, **Compose**, and **Display**.
   A description of the settings can be found in further below in this chapter.

5. To save the settings click on the panel entry **Save**.

Result: The settings are saved.

How to leave the E-Mail settings:

Click on another button in the module bar.

Note: If you leave the settings before having saved the **Configuration changed** pop-up window opens:

If you want to save the settings click **Yes**.

If you do not want to save click **No**.

Tip: You can also switch to the E-Mail settings from the E-Mail module. To do so proceed as follows:

In the upper right part of the overview window's title bar click the **Options** button ▾

Click on the menu entry **Options**.

The following settings are available.

Common tab

Instructions for changing the settings can be found above in 8.2.5.1: E-Mail settings.

- **Default view.**
  Defines the default view for the E-Mail module. The default setting is **H Split view**. A comprehensive description of the views can be found in 3.4: Displaying E-Mails.

- **Default view for Spam folders.**
  Defines the default view for the E-Mail messages in the spam folder.

    If you select **List view**, the contents of spam E-Mail messages are not displayed. You will only see a list of the spam E-Mail messages in the overview window.

    If you select **H Split view** or **V Split view**, the contents of the spam E-Mail messages will be displayed in the overview window.

- **Enable E-Mail Hover?**
  Enables or disables the hovers for the E-Mail module.

- **Automatically select first E-Mail?**
  Defines whether the first E-Mail in the list will be automatically selected when opening an E-Mail folder. The setting is true for the List, H Split, and V Split view.

- **Permanently remove deleted E-Mail messages?**
  Defines whether E-Mail messages will be removed permanently immediately after you click the Delete button or whether they will go to the trash folder.
  Warning: Permanently removed E-Mail messages can not be restored. It is recommended that you select the **No** option.

- **Notify on read acknowledgment?**
  Defines the groupware behaviour in case the sender of an E-Mail wishes an acknowledgment of receipt.

    If set to **Yes**, you are asked during the reading of the E-Mail whether you want to send an acknowledgment of receipt or not.

    If set to **No**, you are not asked and no acknowledgment of receipt is sent.

- **Automatically collect contacts while sending E-Mails?**
  Defines whether new E-Mail addresses are automatically collected in the **Collected contacts** folder when sending a new E-Mail. The **Collected contacts** folder is located below your personal contact folder.

- **Automatically collect contacts while reading E-Mails?**
  Defines whether new E-Mail addresses are automatically collected in the **Collected contacts** folder when reading a new E-Mail. The **Collected contacts** folder is located below your personal contact folder.

Compose tab

- **Insert the original E-Mail text into a reply?**
  Specifies whether the original E-Mail text is appended to an E-Mail reply.

- **When "Reply all":**
  Specifies the recipients of an E-Mail reply when using **Reply all**:

    Add sender and recipients to "To", Cc to "Cc" option: The sender and the recipients of the original E-Mail are entered in the **To:** field. The "Cc" recipients of the original E-Mail are entered in the **Cc:** field.

Add sender to "To", recipients to "Cc" option: The sender of the original E-Mail is entered in the **To:** field. The recipients and the "Cc" recipients of the original E-Mail are entered in the **Cc:** field.

- **Append vcard?**
  Specifies whether your contact data will be attached to a new E-Mail in the vCard format.

- **Enable auto completion of E-Mail addresses?**
  Specifies whether E-Mail addresses are suggested from the address books when entering an E-Mail address.

- **Forward E-Mails as.**
  Specifies how an E-Mail text is sent when forwarding the E-Mail:

  When choosing the **Inline** option, the text is sent within the new E-Mail text body.

  When choosing the **Attachment** option, the text is sent as an attachment to the new E-Mail.

- **Format E-Mails as.**
  Specifies the possible formatting for new E-Mail messages.

- **Editor feature set.**
  Specifies the number of formatting functions offered by the editor when creating HTML formatted E-Mail text.

- **Default E-Mail font.**
  Specifies the default font that should be used for the E-Mail text in HTML E-Mail messages.

- **Default E-Mail font size.**
  Specifies the default font size that should be used for the E-Mail text in HTML E-Mail messages.

- **Line wrap after:**
  Specifies at how many characters a line break is inserted in the text of a new E-Mail.

- **Default sender address:**
  Specifies the pre-set sender address for new E-Mails.

- **Auto-save E-Mail drafts?**
  Specifies the interval for saving the E-Mail text currently composed in the **Drafts** folder. The **Disabled** option deactivates this function.

Display tab

- **Allow HTML formatted E-Mail messages?**
  Specifies whether or not displaying HTML messages is allowed. In terms of bandwidth, HTML messages have a high impact and can be a high security risk as they can contain dangerous scripts.

- **Block pre-loading of externally linked images?**
  Specifies whether or not the preview of externally linked graphics in HTML E-Mail messages is suppressed:

  When choosing **Yes**, external graphics are not directly displayed. This setting protects your privacy.

  When choosing **No** external graphics are loaded and displayed when receiving an HTML message.

- **Display emoticons as graphics?**
  Specifies whether emoticons will be displayed as graphics or as characters. For example, if you type in a smiley after having selected this option, the smiley will be displayed either as a graphic or as a colon followed by a round bracket.

- **Color quoted lines:**
  Specifies whether original messages are highlighted and introduced with a vertical line. The messages or replies will be displayed as embedded. This option assumes that the **Append the original mail text to a reply** option is selected.

8.2.5.2. E-Mail signatures

An E-Mail signature is text that is automatically entered in the E-Mail when being composed. It is typically used for inserting the name, company, and contact address at the bottom of the E-Mail text.

An E-Mail signature can be

- created,
- edited,
- and set as the default signature,

How to open the functions for the E-Mail signatures:

1. In the module bar 🏠 🗒 📇 📅 📧 ⚙ click the **Configuration** icon ⚙.
2. Open the **E-Mail** folder in the folder tree.
3. In the folder tree click the **E-Mail** subfolder **Signatures**.

Result: The functions for E-Mail signatures are displayed in the panel. The existing signatures are displayed in the left pane of the overview window, the right pane displays a preview of the selected signature.

How to create a new E-Mail signature:

1. In the **Signatures** panel section click on **Add**. The **Signatures** dialog window opens.
2. Enter a name.
3. Specify whether the E-Mail signature should be entered above or below the E-Mail text.
4. Specify whether to use the E-Mail signature as the default signature.
5. Enter the signature text.
6. In the dialog window click **OK**.
7. Click on the panel entry **Save**.

Result: The new E-Mail signature is displayed in the overview window.

How to edit an E-Mail signature:

1. Select an E-Mail signature in the overview window.
2. In the **Signatures** panel section click **Edit**. The **Signatures** dialog window opens.
3. Change the data in the E-Mail signature.
4. In the dialog window click **OK**.
5. Click on the panel entry **Save**.

Result: The E-Mail signature is changed.

How to set an E-Mail signature as the default signature:

1. Select an E-Mail signature in the overview window.

2. In the **Signatures** panel section click on **Edit**. The **Signatures** dialog window opens.

3. Activate the **Default signature** checkbox.

4. In the dialog window click on **OK**.

5. Click on the panel entry **Save**.

Result: The E-Mail signature is set as the default signature. The default signature in the overview window is highlighted.

How to delete an E-Mail signature:

1. Select an E-Mail signature in the overview window.

2. In the **Signatures** panel section click on **Remove**.

3. Click on the panel entry **Save**.

Result: The E-Mail signature is deleted.

How to leave the functions for the E-Mail signatures:

Click another button in the module bar.

8.2.5.3. Additional E-Mail accounts

If you use additional E-mail accounts besides your Open-Xchange E-Mail account you can access those E-Mail accounts from the user interface of the Open-Xchange Server by setting up additional E-Mail accounts.

There are the following possibilities:

▪   Set up a new E-Mail account,

▪   edit the settings of an E-Mail account,

▪   delete an E-Mail account.

To set up a new E-Mail account you need the following data:

▪   Your E-Mail address

▪   Your credentials (username and password) for this E-Mail account

▪   The address and port number of the incoming mail server

▪   The address and port number of the outgoing mail server

The incoming and outgoing mail server data are normally provided on the provider's web site e. g., search for the terms POP/IMAP or Configure E-Mail client.

E-Mail accounts are set up and edited in the **Options** module.

How to switch to the options for setting up and editing E-Mail accounts:

1. In the module bar 🏠 🔵 📅 🔳 📇 📧 ❄️ click the **Options** icon ❄️.

2. In the folder tree below E-Mail click **Accounts**.

Result: The overview window displays the available E-Mail accounts. The left pane with the header **Account name** displays the existing E-Mail accounts. The right pane with the header **Account settings** displays the settings of an E-Mail account.

How to create a new E-Mail account:

1. In the **New** panel section click the icon.

2. In **Account Settings** enter a name in the **Account name** entry field.

3. In the **E-Mail Address** entry field enter your E-Mail address for the E-Mail account.

4. If you want your name to be displayed before your E-Mail address when sending E-Mails, enter a name in the **Your name** input field.

5. If you do not want to receive incoming E-Mails for this account in the respective account folder but in the folder Unified Mail, activate **Use Unified Mail for this account**.

6. In **Server settings** enter the incoming mail server data of your E-Mail account:

   In the **Server type** pop-up list select the type of the incoming mail server.

   If the incoming mail server uses encryption, activate **Use SSL connection**.

   In the **Server name** entry field enter the mail server address. A typical IMAP server address has the following syntax: imap.providername.com.

   Check the port number of the incoming mail server and if needed change it in the **Server port** entry field.

   In the **Login** entry field enter your username for the E-Mail server.

   In the **Password** entry field enter your password for the E-Mail server.

   If you selected a POP3 server as server type you have to fill in the following fields:

   In **Check for new messages every 'n' minutes** set the interval for fetching new E-Mails from the POP3 server.

   In case the fetched E-Mails are to be kept on the POP3 server, activate **Leave messages on server**.

   If you want locally deleted E-Mails to be deleted from the POP3 server too, activate **Deleting messages on local storage also deletes them on server** .

7. In **Outgoing server settings (SMTP)** enter the outgoing server data of your E-Mail account:

   If the outgoing mail server uses encryption, activate **Use SSL connection**.

   In the **Server name** entry field enter the outgoing server address. A typical address has the following syntax: smtp.providername.com.

   Check the port number of the outgoing mail server and if needed change it in the **Server port** entry field.

   If you use different account data for the outgoing mail server and the incoming mail server, activate **Use username and password**. Enter the credentials for the outgoing mail server.

8. To check the settings click the **Check connection** button.

9. Click the **Save** button.

Result: The folder tree displays a new E-Mail folder. It has the name you set in step 2.

Tip: You can also set up additional E-Mail accounts by using the setup wizard. Instructions can be found in 8.2.12: Using the Setup Wizard.

How to edit the settings of an E-Mail account:

1. In the **Account name** section select an E-Mail account.

2. In the **Account settings** section change the settings.

3. You can change E-Mail folders by selecting other folders below **Folder settings**.

4. Click the **Save** button.

How to delete an E-Mail account:

1. In the **Account name** section select an E-Mail account.

2. In the panel click **Delete**.

8.2.5.4. E-Mail filter

E-Mail filters help you organize incoming E-Mail messages. For example, you can set up E-Mail filters to trigger the following actions when receiving an E-Mail:

- The E-Mail is moved to a specific E-Mail folder.

- The E-Mail is forwarded to another E-Mail address.

- The E-Mail is marked as read.

In order to use E-Mail filters, proceed as follows:

- Create E-Mail folders.

- Create one or several rules.

- Specify an order for the rules.

- Set if subsequent rules are to be processed when a rule matches.

A rule contains

- a name,

- one or several conditions,

- one or several actions. You can specify whether one or all conditions are to be met in order to process the actions.

You can create a condition by

- selecting an E-Mail component ("Subject", for example);

- selecting a criterion ("is exactly", for example);

- entering an argument ("protocol", for example).

In this case the groupware would verify whether the subject of an E-Mail exactly matches the argument's characters ("protocol"). You can control if the condition is met with the criterion and the character string. The differences between the single criteria will be explained in the examples below. In the examples, the subject is used for filtering E-Mails.

- Criterion: "is exactly"
  The condition is met if the subject exactly matches the argument's character string.
  Example: The argument is "protocol".

  The condition is met for the subject "protocol".

  The condition is not met for the subject "meeting protocol".

- Criterion: "contains"
  The condition is met if the subject contains the characters in the argument.
  Example: The argument is "protocol".

  The condition is met for the subject "protocol".

  The condition is also met for the subject "meeting protocol".

- Criterion: "Matches"
  The condition is met if the subject exactly matches the characters in the argument. The character string can contain wildcards.
  Example: The argument is "protocol*". The "*" character is a wildcard for any characters.

  The condition is met for the subject "protocol update".

  The condition is not met for the subject "meeting protocol".

- Criterion: "Matches regex"

The condition is met if the subject contains the characters provided by the regular expression in the argument. Regular expressions allow complex requests. More information can be found on respective sites on the Internet. The following, very simple regular expression should give an insight to the topic. Example: The argument is "organi(z|s)ation". The expression "(z|s)" stands for either the "z" or the "s" character.

The condition is met for the subject "organization".

The condition is also met for the subject "organisation".

The condition is not met for the subject "Organic".

How to open the functions for E-Mail filters:

1. In the module bar 🏠 👥 🗓 📇 📋 📧 ⚙ click the **Configuration** icon ⚙.

2. In the folder tree click on **E-Mail**.

3. In the folder tree click on the **E-Mail** subfolder **Filter**.

Result: The functions for E-Mail filters are displayed in the panel. The overview window shows the available rules. The left pane with the **Rule Name** title displays the existing rules. The right pane with the title **Rule Details** displays a rule's settings.

The following functions are available:

- Create new rule
  - Add conditions
  - Add actions
- Display the details of a rule
- Activate or deactivate a rule
- Change the sort order of the rules
- Edit a rule
- Delete a rule

How to create a new rule:

1. In the **Rules** panel section click **New**.

2. Enter a name in the **Name** input field in the **Rule Details** pane.

3. In order to add a condition click the **Add condition** button. Define the condition. Details can be found later in this chapter.

   If you want to add a further condition, click the **Add condition** button again.

   If you want to remove a condition, click the **Delete** button next to the condition.

4. If you set several conditions, use the drop-down list **For an incoming message that matches:** to define how the conditions interact to fulfill the rule:

   If any condition is to be met select **Any**.

   If all conditions are to be met select **All**.

5. In order to specify the action to be executed if the rule is met, click the **Add action** button. Details can be found later in this chapter.

   If you want to add an additional action, click the **Add action** button again.

   If you want to remove an action click the **Delete** button next to the action.

6. The **Process subsequent rules even when this rule matches** checkbox lets you specify whether subsequent rules are to be processed if the rule is met:

   If subsequent rules are to be processed activate the checkbox.

   If subsequent rules are not to be processed deactivate the checkbox.

7. Click the **Save** button.

Result: The new rule is entered in the **Rule Name** pane. The new rule is activated.

The following example describes how to create a condition. The following condition should be set up:

   The sender of the E-Mail contains the character string Smith.

How to create a condition:

1. Select **Sender / From** in the drop-down list below **of the following conditions:**. Next to the drop-down list a new drop-down list and an input field are displayed.

2. Select the entry **contains** in the new drop-down list.

3. Enter the character string "Smith" in the input field.

The following example describes how to set an action. The following action should be set:

Move the E-Mail to the **Private** E-Mail folder.

How to set the action:

1. Select the entry **Move to folder** in the drop-down list below **Do the following:**. A new input field is displayed next to the drop-down list.

2. Click on the new input field. Select the Private folder.

How to display the details of a rule:

Select a rule in the **Rule Name** pane. The conditions and actions for the rule are displayed in the **Rule Details** pane.

How to activate or deactivate a rule:

Activate or deactivate the checkbox in the **Active** column.

How to change the rule order:

1. Select a rule in the **Rule Name** pane.

2. Click **Up** or **Down** in the **Move** panel section.

How to edit a rule:

1. Select a rule in the **Rule Name** pane.

2. Change the settings in the **Rule Details** pane.

3. Click the **Save** button.

How to delete a rule:

1. Select a rule in the **Rule Name** pane.

2. Click **Delete** in the **Rules** panel section.

How to leave the page with the E-Mail filters options:

Click another button in the module bar.

8.2.5.5. Vacation notice

If the vacation notice is active, the sender of an incoming E-Mail automatically receives an E-Mail which contains the subject and text of the vacation notice.

How to configure the vacation notice:

1. Click the **Configuration** icon ❄ in the module bar 🏠 🧑‍🤝‍🧑 📅 📇 📋 📧 ❄.

2. Click on **E-Mail** in the folder tree.

3. Click on **Vacation notice** below **E-Mail** in the folder tree.

4. Configure the settings. A description of the settings can be found later in this chapter.

5. In order to save the settings click on the panel entry **Save**.

How to leave the page with the settings for the vacation notice:

Click another button in the module bar.

The following settings are available.

- **Vacation notice is active**
  activates or deactivates the automatic vacation notice.

- **Subject**
  contains the subject of the vacation notice.

- **Text**
  contains the text of the vacation notice.

- **Number of days between vacation notices to the same sender**
  Specifies an interval for sending a vacation notice if there are several E-Mails from the same sender.

- **E-Mail addresses**
  Specifies the E-mail address to be used as the sender address for the vacation notice.

8.2.6. Configuring the Calendar module

The calendar configuration includes

- calendar settings,
- teams.

8.2.6.1. Calendar settings

How to configure the calendar settings:

1. Click the **Configuration** icon ❄ in the module bar 🏠 📧 📅 👤 📋 📦 ❄.

2. Open the **Calendar** entry in the folder tree.

3. Click on **Preferences** below **Calendar** in the folder tree. The possible options are displayed in the overview window.

4. Choose the appropriate settings.
   A description of the settings can be found in later in this chapter.

5. In order to save the settings click on the panel entry **Save**.

How to leave the calendar settings:

Click another button in the module bar.

Note: If you leave the settings window before having saved, the **Configuration changed.** pop-up window opens:

If you want to save the settings click **Yes**.

If you do not want to save click **No**.

Tip: You can also switch to the calendar settings from the calendar module. To do so proceed as follows:

Click the **Options** button ▾ in the upper right corner of the overview window's title bar.

Select the **Options** menu entry.

The following settings are available.

Instructions for changing the settings can be found above in 8.2.6.1: Calendar settings.

- **Default view.**
  Specifies the default view for the calendar module. A comprehensive description of the views can be found in 5.4: Viewing the calendar and appointments.

- **Interval in minutes.**
  Specifies the interval for dividing the time grid. One line per interval is displayed in the calendar views Day, Work week, and Custom. The default setting is 30 minutes.

- **Start of working time.**
  Defines the start of the working hours.

- **End of working time.**
  Defines the end of the working hours.

- **Show confirmation popup for new appointments?**
  Specifies whether, in case of new appointments, a window opens that allows you to set the confirmation status.

- **Enable calendar hovers.**
  Activates or deactivates the hovers for the calendar module.

- **Default time for reminder.**
  Defines the pre-set time interval for the appointment reminder.

- **Number of concurrent appointments shown in day view.**
  Defines the number of concurrent appointments displayed in the day view.

- **Number of days in work week.**
  Defines the number of days in a work week.

- **Work week starts on.**
  Defines the day a work week should start on.

- **Number of concurrent appointments shown in workweek view.**
  Sets the number of concurrent appointments displayed side by side in the work week view.

- **Number of days in custom view.**
  Sets the number of days displayed in the custom view.

- **Number of concurrent appointments shown in custom view.**
  Sets the number of concurrent appointments displayed side by side in the custom view.

- **E-Mail notification for New, Changed, or Deleted?**
  Specifies whether you will receive an E-Mail notification for new, changed, or deleted appointments.

- **E-Mail notification for appointment creator?**
  Specifies whether you will receive an E-Mail notification if other participants accept or decline an appointment created by you.

- **E-Mail notification for appointment participant?**
  Specifies whether you will receive an E-Mail notification if other participants accept or decline an appointment in which you participate.

- **Confirmation status for appointments in personal calendars: set status to .**   Specifies the default appointment confirmation status for new personal appointments to which you have been invited.

- **Confirmation status for appointments in public calendars: set status to.**
  Specifies the default appointment confirmation status for new appointments in public calendars to which you have been invited.

- **Creating public appointments.**
  Specifies whether you are entered as a participant when creating an appointment in a public folder. If you do not invite additional participants you are entered as a participant by default.

8.2.6.2. Teams

A team consists of several groupware users. In order to view the appointments of the team members you can select a team in the team view of the calendar module.

A team can be

- created,
- edited,
- set as the default team,
- and deleted.

How to open the team options page:

1. Click the **Configuration** ❄ icon in the module bar 🏠🏡📅👤📋💼❄.

2. Click on **Calendar** in the folder tree.

3. Click on **Teams** below **Calendar** in the folder tree.

Result: The panel displays the team options. The existing teams are shown in the overview window.

Tip: You can also access the team functions from within the **Calendar** module. Open the team view and click on **Create team** in the **Team Member** panel section.

How to create a new team:

1. Click **Add** in the **Team** panel section. The **Team** dialog window opens.

2. Enter a name.

3. Specify whether the new team should be used as the default team.

4. In order to add a member to the team, click **Add member**.

5. In order to remove a member, select the member and click **Remove member**.

6. Click **OK** in the dialog window.

7. Click on the panel entry **Save**.

Result: The new team is displayed in the overview window.

How to edit a team:

1. Select a team in the overview window.

2. Click **Edit** in the **Team** panel section. The **Team** dialog window opens.

3. Modify the team data.

4. Click **OK** in the dialog window.

5. Click on the panel entry **Save**.

Result: The team is changed.

How to set a team as the default team:

1. Select a team in the overview window.

2. Click **Edit** in the **Team** panel section. The **Team** dialog window opens.

3. Activate the **Default team** checkbox.

4. Click **OK** in the dialog window.

5. Click on the panel entry **Save**.

Result: The team is set as the default team. The default team is highlighted in the overview window.

How to delete a team:

1. Select a team in the overview window.

2. Click **Remove** in the **Team** panel section.

3. Click on the panel entry **Save**.

Result: The team is deleted.

How to leave the team functions:

Click another button in the module bar.

Note: When leaving the settings before having saved the **Configuration changed.** pop-up window opens:

If you want to save the settings click **Yes**.

If you do not want to save click **No**.

8.2.7. Configuration of the Contacts module

How to configure the Contacts module settings:

1. Click the **Configuration** ❄ icon in the module bar 🏠 📇 🗓 👤 📋 📧 ❄.

2. Open the **Contacts** folder in the folder tree.

3. Click on **Preferences** below **Contacts** in the folder tree. The options are displayed in the overview window.

4. Choose the appropriate settings.
   A description of the settings can be found further below [154] in this chapter.

5. In order to save the settings click on the panel entry **Save**.

How to leave the contacts settings:

Click another button in the module bar.

Note: When leaving the settings before having saved, the **Configuration changed.** pop-up window opens:

If you want to save the settings click **Yes**.

If you do not want to save, click **No**.

Tip: You can also switch to the contacts options from within the Contacts module. To do so proceed as follows:

Click the **Options** button ▾ in the upper right corner of the overview window's title bar.

Select the **Options** menu entry.

The following settings are available.

▪ **Default view .**
   Sets the default view for the Contacts module. A comprehensive description of the views can be found in 4.4: Viewing contacts.

▪ **Number of rows to be displayed in card view: .**
   Sets the number of rows in the Card view. When set to **auto** the groupware sets the number to an appropriate value. The default setting is 4 rows. If need be scrollbars are displayed.

▪ **Enable Contacts Hover .**
   Activates or deactivates the hovers for the Contacts module.

8.2.8. Configuring the Tasks module

How to configure the Tasks module options:

1. Click the **Configuration** ✿ icon in the module bar 🏠 👥 📅 📇 📄 💼 ✿.

2. Click on **Tasks** in the folder tree.

3. Click on **Preferences** below **Tasks** in the folder tree. The overview window shows the available settings.

4. Configure the settings.
   A description of the settings can be found further below [155] in this chapter.

5. In order to save the settings click on the panel entry **Save**.

How to leave the tasks settings:

Click another button in the module bar.

Note: If you leave the options page before having saved, the **Configuration changed.** pop-up window opens:

If you want to save the settings click **Yes**.

If you do not want to save click **No**.

Tip: You can also switch to the tasks settings from within the tasks module. To do so proceed as follows:

Click the **Options** button ⌄ in the upper right corner of the overview window's title bar.

Select the **Options** menu entry.

The following settings are available.

- **Default view:**
  Sets the default view of the tasks module. A comprehensive description of the views can be found in 6.4: Viewing tasks.

- **Reminder interval in minutes.**
  Specifies the preset time interval for the reminder of the task's due date.

- **Enable Tasks Hover.**
  Activates or deactivates the hovers for the Tasks module.

- **E-Mail notification for New, Changed, or Deleted?**
  Specifies whether you will receive an E-Mail notification for new, changed, or deleted tasks.

- **E-Mail notification for task creator?**
  Specifies whether you will receive an E-Mail notification if other participants accept or decline a task that was created by you.

- **E-Mail notification for task participant?**
  Specifies whether you will receive an E-Mail notification if other participants accept or decline a task in which you participate.

8.2.9. Configuring the InfoStore module

How to configure the InfoStore settings:

1. Click the **Configuration** ❄ icon in the module bar 🏠 📧 📅 📇 📋 📦 ❄.

2. Click on **InfoStore** in the folder tree.

3. Click on **Preferences** below the **InfoStore** entry in the folder tree. The overview window displays the available settings.

4. Configure the settings.
   A description of the settings can be found further below [156] in this chapter.

5. In order to save the settings click on the panel entry **Save**.

How to leave the InfoStore options page:

Click another button in the module bar.

Note: If you leave the options page before having saved, the **Configuration changed.** pop-up window opens:

If you want to save the settings click **Yes**.

If you do not want to save click **No**.

Tip: You can also switch to the InfoStore settings from within the InfoStore module. To do so proceed as follows:

Click the **Options** button ▾ in the upper right corner of the overview window's title bar.

Select the **Options** menu entry.

The following settings are available.

▪ **Default view:**
  Sets the default view for the InfoStore module. A comprehensive description of the views can be found in 6.4: Viewing tasks.

▪ **Enable InfoStore Hover.**
  Activates or deactivates the hovers for the InfoStore module.

8.2.10. Changing user data

The user data include:

- Personal user data
- Password for accessing the groupware

8.2.10.1. Changing personal data

How to change your personal data:

1. Click the **Configuration** ⚙ icon in the module bar 🏠 🔗 🗓 👤 📋 📁 ⚙.

2. Click on **User** in the folder tree.

3. Click on **Personal data** below **User** in the folder tree.

4. Edit your personal data in the input fields.

5. In order to save the changes click on the panel entry **Save**.

Result: Your personal data is changed.

Tip: You can also change your personal data by using the setup wizard. Information can be found in 8.2.12: Using the Setup Wizard.

8.2.10.2. Changing your password

How to change your password:

1. Click the **Configuration** ⚙ icon in the module bar 🏠 🔗 🗓 👤 📋 📁 ⚙.

2. Click on **User** in the folder tree.

3. Click on **Password** below the entry **User** in the folder tree.

4. Enter your current password in the input field **Your old password**.

5. Enter a new password in the input field **Your new password**.

6. Re-enter the new password in the input field **Confirm new password**.

7. In order to save the change click on the panel entry **Save**.

Result: The password is changed.

8.2.11. Administration

The administration includes

- managing groups

- and managing resources.

Note: These functions are only available to particular users. In case these functions are not available to you ask your administrator or host.

8.2.11.1. Managing groups

You can

- create a group of users,

- add members,

- remove members,

- and delete a group of users.

How to access the functions for managing groups:

1. Click the **Configuration** ✱ icon in the module bar 🏠 🏡 📅 👤 📋 📧 ✱.

2. Click on **Administration** in the folder tree.

3. Click on **Groups** below **Administration** in the folder tree.

Result: The functions for managing groups are displayed in the panel. The existing groups are displayed in the left pane of the overview window, the properties for the selected group are displayed in the right pane.

How to create a new group:

1. Click on **New** in the **Groups** panel section.

2. Enter a group name in the right pane of the overview window.

3. Enter the display name for the group.

4. Click on the panel entry **Save**.

Result: The new group is displayed in the left pane of the overview window. It has no members yet.

How to add members to a group:

1. Select a group in the left pane of the overview window.

2. Click on **Add** in the **Members** panel section. The **Select participants** dialog window opens.

3. Add participants.

4. Click on **OK** in the dialog window.

5. Click on the panel entry **Save**.

How to remove members from a group:

1. Select a group in the left pane of the overview window.

2. Select a member of the group in the right pane of the overview window.

3. Click on **Remove** in the **Members** panel section.

4. Click on the panel entry **Save**.

Result: The member is removed from the group.

How to delete a group:

1. Select a group in the left pane of the overview window.

2. Click on **Delete** in the **Groups** panel section.

3. Click on **Yes** in the **Delete group** pop-up window.

Result: The group is deleted.

How to leave the functions for managing groups:

Click another button in the module bar.

8.2.11.2. Managing resources

Resources can be

- created,

- edited,

- and deleted.

How to access the functions for managing resources:

1. Click the **Configuration** ❄ icon in the module bar 🏠 🐧 🗓 📇 📆 📧 ❄.

2. Click on **Administration** in the folder tree.

3. Click on **Resources**below **Administration** in the folder tree.

Result: the functions for managing resources are displayed in the panel. The existing resources are displayed in the left pane of the overview window, the properties for the selected resource are displayed in the right pane.

How to create a new resource:

1. Click on **New** in the **Resources** panel section.

2. Enter the resource name in the right pane of the overview window.

3. Enter the display name for the resource.

4. Enter an E-Mail address for the resource. If the resource is booked, an E-mail notification is sent to this address.

5. Enter a description for the resource.

6. Click on the panel entry **Save**.

Result: The new resource is displayed in the left pane of the overview window.

How to edit a resource:

1. Select a resource in the left pane of the overview window.

2. Change the data in the right pane of the overview window.

3. Click on the panel entry **Save**.

Result: The data is changed.

How to delete a resource:

1. Select a resource in the left pane of the overview window.

2. Click on **Delete** in the **Resources** panel section.

3. Click on **Yes** in the **Delete resource** pop-up window.

Result: The resource is deleted.

How to leave the functions for managing resources:

Click another button in the module bar.

8.2.12. Using the Setup Wizard

You can adjust the following settings with the setup wizard:

- Complete personal data

- Set up external E-Mail accounts and subscribe contact data

- Publish data

- Access the configuration help for setting up mobile devices when using the OXtender for BSMobility

The setup wizard will automatically be launched when initially logging in to the Open-Xchange Server. You can also launch the setup wizard later.

How to launch the setup wizard:

1. Click the **Help** icon in the title bar.

2. Click on the **Setup Wizard** entry in the pop-up menu. The **Setup Wizard** window opens.

3. Click **Start** in the bottom right corner.

4. Follow the instructions.

8.3. Importing

You can import appointments, tasks, and contact data created in other applications into the groupware.

8.3.1. What data can be imported?

The following data is supported:

- iCal
- vCard
- CSV

iCal data allows the standardized exchange of calendar data like appointments and tasks. The typical name extension of an iCal file is .ics.

vCard data allows the standardized exchange of contact data in the form of an electronic business card. The typical name extension of a vCard file is .vcf.

CSV data allows the exchange of text data in the form of a table. You can import contact data from a CSV file. The typical name extension is .csv.

8.3.2. Importing appointments and tasks in iCal format

8.3.2.1. Which iCal objects are imported?

A description of all iCal objects can be found in the document RFC2445 [http://tools.ietf.org/html/rfc2445].

The following table shows which iCal objects are imported in the groupware and which are not. The information in the columns "Appointments" and "Tasks" have the following meaning:

- "X" means the object is imported. The object value is set in RFC2445.
- A number like "255" means the object is imported. The number indicates the maximum number of characters.
- The entry "unlimited" means the object is imported. There is no limit for the maximum number of characters.
- The entry "-" means the object is not imported.

Category	iCal object	Appointments	Tasks
Calendar Properties	CALSCALE	-	-
	METHOD	-	-
	PRODID	X	X
	VERSION	X	X
Calendar Components	VALARM	X	X
	VEVENT	X	X
	VFREEBUSY	-	-
	VJOURNAL	-	-
	VTIMEZONE	X	X
	VTODO	X	X
Component Properties	ATTACH	-	-
	ATTENDEE	X	X
	CATEGORIES	X	X
	CLASS	X	X
	COMMENT	-	-
	COMPLETED	-	X
	CONTACT	-	-
	CREATED	X	X
	DESCRIPTION	Unlimited	Unlimited
	DTEND	X	X
	DTSTAMP	X	X
	DTSTART	X	X
	DUE	X	X
	DURATION	X	X
	EXDATE	X	-
	EXRULE	-	-
	FREEBUSY	-	-
	GEO	-	-
	LAST-MODIFIED	-	-
	LOCATION	255	-
	ORGANIZER	-	-
	PERCENT-COMPLETE	-	X
	PRIORITY	-	X
	RDATE	-	-
	RECURRENCE-ID	-	-
	RELATED-TO	-	-
	REPEAT	-	-
	REQUEST-STATUS	-	-
	RESOURCES	X	-
	RRULE	X	X
	SEQUENCE	-	-

Category	iCal object	Appointments	Tasks
	STATUS	-	X
	SUMMARY	255	255
	TRANSP	-	X
	TRIGGER	X	X
	TZID	X	X
	TZNAME	X	X
	TZOFFSETFROM	X	X
	TZOFFSETTO	X	X
	TZURL	X	X
	UID	X	X
	URL	-	-
Property Parameters	CUTYPE	X	X
	DELEGATED-FROM	-	-
	DELEGATED-TO	-	-
	DIR	-	-
	ENCODING	X	X
	FMTTYPE	-	-
	FBTYPE	-	-
	LANGUAGE	-	-
	MEMBER	-	-
	PARTSTAT	-	-
	RANGE	-	-
	RELATED	-	-
	RELTYPE	-	-
	ROLE	-	-
	RSVP	-	-
	SENT-BY	-	-
	TZID	X	X
	VALUE	X	X

8.3.2.2. Which iCal object properties are not supported?

The groupware supports appointments in the form "The last Sunday of a month".

The groupware does not support appointments with days counted from the end of the month ("The second last Sunday of a month", for example). If an appointments includes such information the appointment is not imported.

The groupware does not support alarm repetition. Example: "Remind me four times". If an appointment contains such information the information is ignored.

8.3.2.3. Accomplishing an iCal import

Note: Make sure the file that is to be imported contains correct iCal data.

How to import appointments or tasks in the iCal format:

1. Click the **Configuration** ❄ icon in the module bar 🏠 🏡 📅 📇 📋 📧 ❄.

2. Click on **Import** below **Configuration** in the folder tree. The available options for the import are displayed in the overview window.

3. Select the **iCal** file type. Specify the data to be imported:

    If you want to import appointments select **Appointments** in the drop-down field.

    If you want to import tasks select **Tasks** in the drop-down field.

4. Click on **Folder**. Select the target folder for the import.

5. Click on **Browse**. Select the file to be imported. Close the file selection dialog window.

6. In order to complete the data import click on the panel entry **Import**.

Result: The appointments or tasks are imported into the target folder.

Tip: You can also import appointments or tasks by right-clicking on a calendar or task folder and selecting **Import** from the **Extended** submenu.

8.3.3. Importing contacts in the vCard format

Note: Make sure the file that is to be imported contains correct vCard data.

How to import contacts in the vCard format:

1. Click the **Configuration** ❄ icon in the module bar 🏠 🏡 📅 📇 📋 📧 ❄.

2. Click on **Import** below the entry **Configuration** in the folder tree. The settings available for the import are displayed in the overview window.

3. Select the file type **vCard**.

4. Click on **Folder**. Select the target folder for the import.

5. Click on **Browse**. Select the file to be imported. Close the file selection dialog window.

6. In order to complete the data import click on the panel entry **Import**.

Result: The contacts are imported into the target folder.

Tip: You can also import contacts by right-clicking on a contact folder and selecting **Import** from the **Extended** submenu.

8.3.4. Importing contacts in the CSV format

The following CSV files are supported:

- Standard CSV files with comma separated values

- CSV files from Microsoft Outlook

8.3.4.1. What is the structure of a standard CSV file?

A standard CSV file contains contacts in the form of a table. The table has the following structure:

- The first row contains the headers i.e., the names of the data fields.

- Each of the following rows contains the data fields for a contact in the individual columns.

- The data fields are comma separated.

- The end of the line is indicated by a line wrap.

A CSV file can, for example, be created with spread sheet software or a text editor. When doing so you have to consider the following details.

- If there are umlauts in the data fields of the CSV file, they have to be utf-8 encoded.

- The first row of the CSV file has to contain at least one of the column titles mentioned below.

- The column titles are case sensitive.

- The columns can be in any order. The imported data will be assigned to the data fields in the Groupware.

- The data fields are separated with commas.

- If there is invalid data in a data field the respective contact will be skipped. Data is invalid if:

  □ The number of characters is exceeded. The table below shows the allowed number of characters for each data field.

  □ A data field has the wrong format.

- The data fields have to have following format:

  □ All E-Mail fields have to contain the "@" character.

  □ The data fields have to be in a valid format.

  □ All other data fields can contain any character.

  □ The file can have an empty data field.

The first row of the CSV file has to contain one or more of the following column headers:

Display name	Sur name	Given name	Middle name
Suffix	Title	Street home	Postal code home
City home	State home	Country home	Martial status
Number of children	Profession	Nickname	Spouse name
Note	Company	Department	Position
Room number	Street business	Postal code business	City business
State business	Country business	Number of employee	Sales volume
Tax id	Commercial register	Branches	Manager's name
Assistant's name	Street other	Postal code other	City other
State other	Country other	Telephone business 1	Telephone business 2
FAX business	Telephone car	Telephone company	Telephone home 1
Telephone home 2	FAX home	Cellular telephone 1	Cellular telephone 2
Telephone other	FAX other	Telephone pager	Telephone telex
Telephone TTY/TDD	Instantmessenger 1	Instantmessenger 2	Telephone IP
Email 1	Email 2	Email 3	URL
Categories	Dynamic Field 1	Dynamic Field 2	Dynamic Field 3
Dynamic Field 4	Dynamic Field 5	Dynamic Field 6	Dynamic Field 7
Dynamic Field 8	Dynamic Field 9	Dynamic Field 10	Dynamic Field 11
Dynamic Field 12	Dynamic Field 13	Dynamic Field 14	Dynamic Field 15
Dynamic Field 16	Dynamic Field 17	Dynamic Field 18	Dynamic Field 19
Dynamic Field 20	private	Birthday	Anniversary

8.3.4.2. How is the data mapping done for a standard CSV file?

During the import the data fields of the CSV file will be assigned to certain data fields in the Groupware. The following table shows the contact fields in the Groupware and the fields they are assigned to. The table also shows the maximum number of characters allowed for the data field.

Data fields in the contact dialog window			CSV data field
Tab	**Data field**	**Max. chars**	
Business	Title	64	Title
	First name	128	Given name
	Middle name	128	Middle name
	Last name	128	Sur name
	Suffix	64	Suffix
	Display name	64	Display name
	Company	512	Company
	Street	256	Street business
	ZIP	64	Postal code business
	City	128	City business
	Country	64	Country business
	State	64	State business
	Department	128	Department
	Position	128	Position
	Room number	64	Room number
	Employee ID	64	Number of employee
	Phone (business)	64	Telephone business 1
	Phone (business 2)	128	Telephone business 2
	Fax (business)	64	FAX business
	Phone (company)	64	Telephone company
	Mobile	64	Cellular telephone 1
	URL	128	URL
	E-Mail (business)	256	Email 1
	IM (business)	64	Instantmessenger 1
	Tags	1024	Categories
	Type		private
Private	Profession	64	Profession
	Date of birth		Birthday
	Street	256	Street home
	ZIP	64	Postal code home
	City	64	City home
	State	64	State home
	Country	64	Country home
	Nickname	64	Nickname
	Phone (private)	64	Telephone home 1
	Phone (private 2)	64	Telephone home 2

Data fields in the contact dialog window			CSV data field
Tab	**Data field**	**Max. chars**	
	Fax (private)	64	FAX home
	Mobile (private)	64	Cellular telephone 2
	IP-phone (private)	64	Telephone IP
	E-Mail (private)	256	Email 2
	Marital status	64	Martial status
	Anniversary		Anniversary
	IM (private)	64	Instantmessenger 2
	Pager	64	Telephone pager
	Comments	5680	Note
Additional	Street (other)	256	Street other
	ZIP (other)	64	Postal code other
	City (other)	64	City other
	State (other)	64	State other
	Country (other)	64	Country other
	Phone (other)	64	Telephone other
	Fax (other)	64	FAX other
	E-Mail (other)	256	Email 3
	Phone (car)	64	Telephone car
	TTY/TDD	64	Telephone TTY/TDD
	Sales Volume	64	Sales volume
	TAX ID	128	Tax id
	Commercial Register	64	Commercial register
	Branches	64	Branches
	Manager	64	Manager's name
	Assistant	64	Assistant's name
	Telex	64	Telephone telex
	Spouse's name	64	Spouse name
	Children	64	Number of children
	Optional 1 .. 20	64	Dynamic Field 1 .. 20

8.3.4.3. How to create an MS Outlook CSV file?

To create a CSV file in MS Outlook that can be imported to the Groupware proceed as follows:

1. Select the menu item **File|Import/Export**.

2. In the dialog window Import/Export Wizard choose the entry **Export to file**. Click on **Next**.

3. Choose the entry **Comma separated values (Windows)**. Click **Next**.

4. Select the contact folder to be exported. Click **Next**.

5. Set the name and location for the output file. Click **Next**.

6. To complete the export process click on **Finish**. Note: Leave the check box **Export contacts from ...** activated. Do not click on **Assign fields**. Leave the default assignment unchanged.

Result: The new CSV file contains all data fields for the exported contacts.

8.3.4.4. Which data fields from an MS Outlook CSV file are imported?

The following data fields are imported in the Groupware:

Anniversary	Assistant's Name	Birthday
Business City	Business Country	Business Fax
Business Phone	Business Phone 2	Business Postal Code
Business State	Business Street	Car Phone
Categories	Children	Company
Company Main Phone	Department	E-mail 2 Address
E-mail 3 Address	E-mail Address	First Name
Home City	Home Country	Home Fax
Home Phone	Home Phone 2	Home Postal Code
Home State	Home Street	Last Name
Manager's Name	Middle Name	Mobile Phone
Notes	Organizational ID Number	Other City
Other Country	Other Fax	Other Phone
Other Postal Code	Other State	Other Street
Pager	Profession	Sensitivity
Spouse	Suffix	Telex
Title	TTY/TDD Phone	Web Page

8.3.4.5. How is the data mapping done for an MS Outlook CSV file?

When importing, the data fields of the MS Outlook CSV file will be assigned to certain data fields in the Groupware. The following table shows the assignment by listing the data fields that are displayed when editing a contact in the Groupware. The table also shows the maximum number of characters for each data field.

Data fields in the Contacts dialog window			MS Outlook CSV data field
Tab	Data field	Max. chars.	
Business	Title	64	Title
	First name	128	First name
	Middle name	128	Middle name
	Last name	128	Last name
	Suffix	64	Suffix
	Company	512	Company
	Street	256	Business Street
	ZIP	64	Business Postal Code
	City	128	Business City
	Country	64	Business Country
	State	64	Business State
	Department	128	Department
	Phone (business)	64	Business Phone
	Phone (business 2)	128	Business Phone 2
	Fax (business)	64	Business Fax
	Phone (company)	64	Company Main Phone
	Mobile	64	Mobile Phone
	URL	128	Web Page
	Email (business)	256	E-mail Address
	Tags	1024	Categories
	Type		Sensitivity
Private	Profession	64	Profession
	Date of birth		Birthday
	Street	256	Home Street
	ZIP	64	Home Postal Code
	City	64	Home City
	State	64	Home State
	Country	64	Home Country
	Phone (private)	64	Home Phone
	Phone (private 2)	64	Home Phone 2
	Fax (private)	64	Home Fax
	Email (private)	256	E-mail 2 Address
	Anniversary		Anniversary
	Pager	64	Pager
	Comment	5680	Notes
Additional	Street (other)	256	Other Street
	ZIP (other)	64	Other Postal Code
	City (other)	64	Other City
	State (other)	64	Other State
	Country (other)	64	Other Country

Data fields in the Contacts dialog window			MS Outlook CSV data field
Tab	Data field	Max. chars.	
	Phone (other)	64	Other Phone
	Fax (other)	64	Other Fax
	E-Mail (other)	64	E-mail 3 Address
	Phone (car)	64	Car Phone
	TTY/TDD	64	TTY/TDD Phone
	Commercial Register	64	Organizational ID Number
	Manager	64	Manager's Name
	Assistant	64	Assistant's Name
	Telex	64	Telex
	Spouse's name	64	Spouse
	Children	64	Children

8.3.4.6. Importing a CSV file

Warning: If the data field for an import file exceeds the maximum number of allowed characters or contains invalid data the respective contact will be skipped during the import.

Note: Make sure to use valid import files. Please find some hints on valid import files in 8.3.4.1: What is the structure of a standard CSV file? and 8.3.4.3: How to create an MS Outlook CSV file?.
There is no check for duplicate entries during the import. Contacts are entered as many times as they are imported.

To import contacts from a default CSV file or an MS Outlook file proceed as follows:

1. Click the **Options** icon ❄ in the module bar 🏠 📇 📅 📇 📅 📧 ❄.

2. Click on **Import** below **Configuration** in the folder tree. The import settings are displayed in the overview window.

3. Select **CSV** as file type.

4. Select the CSV file format:

If the file contains data in the default CSV format select **Comma separated**.

If the file contains data in the MS Outlook CSV format, select **Outlook file**.

Click on **Folder**. Select the folder for the import.

5. Click on **Browse**. Select the file to be imported. Close the file selection dialog.

6. To execute the data import click on the panel entry **Import**.

Result: The contacts are imported into the target folder.

Tip: You can also import contacts by right-clicking on a contact folder and selecting **Import** from the **Extended** submenu.

8.4. Export

With the Export function you can export certain groupware data for further usage with other programs. You can export the following data:

- Contacts in vCard format,
- Appointments and tasks in iCal format.

Both formats are standardized and can be imported by many other programs.

8.4.1. Exporting contacts with WebDAV

All contacts from your personal contact folders are exported. Contacts from subfolders are not exported.

Another possibilty for exporting contacts is described in 4.7.9: Exporting contacts.

How to export your personal contacts with WebDAV:

1. Enter the following address in a browser:
http://<adress>/servlet/webdav.vcard
whereas <address> has to be replaced with the Open-Xchange Server's IP address or URL.

2. Enter the username and password for your Open-Xchange Server account.

3. In the **Open webdav.vcard** window select **Save file** and click **OK**.

Result: The **webdav.vcard** file is downloaded. It contains your personal contacts. To import the data in other programs rename the file to **webdav.vcf**.

8.4.2. Exporting appointments and tasks with WebDAV

All appointments and tasks from your personal appointments or tasks folders are exported. Appointments and tasks from subfolders are not exported.

How to export your personal appointments and tasks:

1. Enter the following address in a browser:
http://<adresse>/servlet/webdav.ical
whereas <address> has to be replaced with the Open-Xchange Server's IP address or URL.

2. Enter the username and password for your Open-Xchange Server account.

3. In the **Open webdav.ical** window select **Save file** and click **OK**.

Result: The **webdav.ical** file is downloaded. It contains your personal appointments and tasks.

8.5. Folder Management

8.5.1. What do I have to know about folders?

In order to effectively work with folders you should know the following:

- What are folder categories?

- What are folder types?

- Which folders exist?

- What is the purpose of permissions?

8.5.1.1. What are folder categories?

The folder category defines whether a folder is used only by one user or by several users.

There are the following folder categories:

- **Personal folders.** They are located below your personal root folder. The personal root folder is the folder named after your user name. You can create any personal folders you like. By default other users can not view your personal folders.
  Note: Your personal InfoStore folder is located below **InfoStore/UserStore**.

- **Public folders.** They are located in the folder tree below **Public folders**. Each user can create public folders. By default public folders are visible to all users.
  Note: The public InfoStore folder is located in **InfoStore/Public InfoStore**.

- **Shared folders.** They are located in the folder tree below **Shared folders**. Here you can see the folders shared with you by other users.
  Note: Shared InfoStore folders are located below **InfoStore/UserStore**.

8.5.1.2. What are folder types?

The folder type defines the objects in a folder.

There are the following folder types:

- E-Mail folder. Contains E-Mail objects.

- Contact folders. Contains contact objects.

- Calendar folders. Contains appointment objects.

- Task folders. Contains task objects.

- InfoStore folders. Contains InfoStore objects.

You define the folder type when creating a new folder.

8.5.1.3. Which folders exist?

The following folders exist by default:

Folders in the folder tree	Contents
Your username	Your personal root folder
E-Mail	Incoming and outgoing E-Mail messages
Calendar	Personal calendars and appointments
Contacts	Personal contacts
Tasks	Personal tasks
Public folders	Folders that are visible to all users.
Global address book	Address data of all users
Shared folders	Folders shared with you by other users
InfoStore	All InfoStore folders
UserStore	Personal and shared InfoStore folders
Your username	Your personal InfoStore folder
Other username	Shared InfoStore folder of another user
Public InfoStore	Public InfoStore folder

8.5.1.4. What is the purpose of permissions?

Permissions define what a user is allowed to do with a particular folder and its contents i.e., users have certain rights for the folders. If all pre-conditions are met a user can grant rights to other users or modify their existing rights.

Usually, the reason for granting rights is to share data and information with other users. This is an essential part of a groupware. Granting rights for a folder to other users is also called "Sharing a folder".

In order to control if a user e.g., can only read or also modify folder contents, there are a number of hierarchical permissions. The highest permission is the administrator right. It includes all other rights and the right to share a folder with other users.

The following examples show how to apply particular rights:

- You have the administrator right for your personal folders. In order to hide your personal data from other users, the other users do not have any rights to your personal folders as long as you do not share your personal folders.

- In order to be able to make data and information available to other users you have the right to create subfolders in the **Public folders** folder. Those subfolders can be shared with other users.

- In order to be able to read the address data of other users and to change your own address data you have the right to read all objects in the **Global address book** folder and to create own objects in this folder.

Detailed information on permissions and instructions on how to grant permissions can be found in 8.6: Permission management.

8.5.2. Creating folders

New folders can be created in the following folders:

Folders in the folder tree	Which folder types can be created?
Personal root folder	Calendar folders, tasks folders, contacts folders
E-Mail	--
Inbox	E-Mail folders
Calendar	Calendar folders, task folders, contact folders
Contacts	Calendar folders, task folders, contact folders
Tasks	Calendar folders, task folders, contact folders
Public folders	Calendar folders, task folders, contact folders
Folder name **(*)**	Calendar folders, task folders, contact folders
Global address book	--
Shared folders	--
Other username	--
Folder name **(*)**	Calendar folders, task folders, contact folders
InfoStore	--
UserStore	--
Personal InfoStore folder	InfoStore folders
Other username **(*)**	InfoStore folders
Public InfoStore	InfoStore folders

Note: For the folders in the folder tree that are marked with **(*)** you need to have the right to create subfolders.

Detailed information on permissions and an instruction on how to grant rights can be found in 8.6: Permission management.

How to create a new folder:

1. Right-click on a folder in the folder tree.

2. Move the mouse pointer to **New subfolder**. A submenu with folder types opens.

3. Click on the folder type that you want to create.
   Note: Depending on the folder in which you create a new subfolder, some folder types might be disabled. Details can be found in the table.
   Result: A folder with the name **New folder** is created. The folder name is highlighted.

4. Enter a name. Then press Enter.

Result: A new folder is created.

8.5.3. Renaming folders

Note: In order to be able to rename a folder you need to have administration rights for the folder.

How to rename a folder:

1. Right-click on a folder in the folder tree.

2. From the context menu select **Rename**. the folder name will be highlighted.

3. Edit the name or enter a new name.

4. Press Enter.

Result: The folder is renamed.

8.5.4. Moving folders

Note: In order to move a folder, you need to have administration rights for the folder and the right to create subfolders in the target folder.

How to move a folder:

1. Right-click on a folder in the folder tree.

2. Select **Cut** from the context menu. The folder icon is grayed out.

3. Right-click on the folder where you want to paste the cut folder.

4. Select **Paste** from the context menu.

Result: The folder is moved.

8.5.5. Sending a link to a folder

You can send a link to a folder to internal groupware users.

How to send a link to a folder:

1. Right-click on a folder in the folder tree.

2. Select **Send as link** from the context menu.

Result: The **E-Mail** window opens. The link to the folder is entered as the E-Mail text.

Note: In order to follow the link, the E-Mail recipient needs to have the respective rights for the folder.

8.5.6. Deleting folders

Warning: If you delete a folder all subfolders and objects in that folder are deleted as well. Deleted subfolders and deleted objects can not be restored.

Note: In order to be able to delete a folder you need to have administration rights for the folder.

How to delete a folder:

1. Right-click on a folder in the folder tree.

2. Select **Delete** from the context menu. The **Delete folder** dialog window opens.

3. Click on **Yes**.

Result: the folder and its objects are permanently deleted.

8.6. Permission management

8.6.1. What do I have to know about permissions?

Permissions define what a user can do with a particular folder. The following rules apply:

- Permissions are assigned to folders and not to single objects within folders.
- For each folder there is at least one user who is the folder administrator. The folder administrator can
  - give other users permissions for the folder,
  - rename, move, and delete the folder.
- There is a permission hierarchy. The permission that is higher in the ranking comprises the permissions that are lower in the ranking.
- If a user belongs to several groups with different rights for a folder, the user will always get the permission highest in the ranking.

The following overview always lists the permission highest in the ranking on the bottom. The following permissions exist:

- **Change Right** Defines whether a user is the folder administrator.
  - **No Permission** The user is not the administrator.
  - **Admin** The user is the administrator.
- **Folder rights** Defines what a user can do with the folder.
  - **No folder rights** The user has no rights for the folder.
  - **Visible folder** The user can see the folder.
  - **Create objects** The user can create objects in the folder.
  - **Create subfolder** The user can create subfolders in the folder.
  - **Admin** The user can create subfolders in the folder.
- **Read rights** They define which folder objects are visible to a user.
  - **None** The user can not see the objects.
  - **Own** The user can only see the objects created by him/her.
  - **All** The user can see all objects.
  - **Admin** The user can see all objects.
- **Modify rights** They define which folder objects can be modified by the user.
  - **None** The user can not modify any objects.
  - **Own** The user can only modify objects created by him/her.
  - **All** The user can modify all objects.
  - **Admin** The user can modify all objects.
- **Delete rights** They define which folder objects can be deleted by the user.
  - **None** The user can not delete any objects.
  - **Own** The user can only delete objects created by him/her.
  - **All** The user can delete all objects.
  - **Admin** The user can delete all objects.

8.6.2. Which folder permissions are preset for a user?

The following chapter describes the user rights

- for existing folders,

- for newly created folders.

8.6.2.1. Permissions for existing folders

You have the following rights for your personal folders:

- Change right: Admin

- Folder rights: Create subfolder

- Read rights: All, Modify rights: All, Delete rights: All

For the **Public folders** folder all users and groups have the following rights:

- Change right: No permission

- Folder rights: Create subfolder

- Read rights: None, Modify rights: None, Delete rights: None

For the **Global address book** folder all users and groups have the following rights:

- Change right: No permission

- Folder rights: Visible folder

- Read rights: All, Modify rights: Own, Delete rights: None

For the **InfoStore** folder and the **UserStore** folder all users and groups have the following rights:

- Change right: No permission

- Folder rights: Visible folder

- Read rights: None, Modify rights: None, Delete rights: None

For the **Public InfoStore** folder all users and groups have the following rights:

- Change right: No permission

- Folder rights: Create subfolder

- Read rights: None, Modify rights: None, Delete rights: None

8.6.2.2. Permissions for newly created folders

Depending on where you create a new folder, particular rights are assigned to you and other users.

If you create a new folder in a personal folder:

- You will get all administrator rights.

- Other users and groups will get the same rights as for the parent folder.

If you create a new folder in the **Public folder** folder or in the **InfoStore/Public InfoStore** folder:

- You will get all administrator rights.

- Other users and groups will get the same rights as for the parent folder.

If you create a new folder in the shared folder of an other user:

- The user who shared the folder will get all administrator rights for the new folder.

- You as well as other users and groups will get the same rights as for the parent folder.

8.6.3. Where do I find folders shared by other users?

The following example shows where in the folder tree you can find the folders shared by other users. The following applies:

▪ The user **Timo Meier** shares the following personal folders for you:

    ▫ his calendar folder

    ▫ his InfoStore folder

    ▫ his personal **Team** E-Mail folder

▪ The user **Tom Green** creates the new folder **VacationCalendar** in the **Public folders** folder. The folder inherits the permissions of the parent folder.

▪ The user **Jean Dupont** creates the new folder **Company** in the **InfoStore/Public InfoStore** folder. The folder inherits the rights of the parent folder. He shares the folder **MeetingMinutes** in his personal InfoStore folder. His personal InfoStore folder will not be shared.

Your folder tree shows the following entries:

Your username	Your personal root folder. It contains your personal folders.
E-Mail	
Inbox	
user	
Timo Meier	
Team	Shared E-Mail folder of Timo Meier
Tasks	
Calendar	
Contacts	
Public folders	
Global address book	
VacationCalendar	Folder created by Tom Green.
Shared folders	
Timo Meier	
Calendar	Shared calendar folder of Timo Meier
InfoStore	
UserStore	
Your username	Your personal InfoStore folder
Timo Meier	Shared InfoStore folder of Timo Meier
Jean Dupont	
MeetingMinutes	Shared subfolder in the InfoStore folder of Jean Dupont
Public InfoStore	
Company	Folder created by Jean Dupont

Note: In order to see the shared E-Mail folder, you have to subscribe to this folder. Details can be found in 8.6.4: Subscribing to E-Mail folders.

8.6.4. Subscribing to E-Mail folders

In order to see E-Mail folders shared by other users, you have to subscribe those folders.

How to subscribe to shared E-Mail folders:

1. Right-click on the **Inbox** folder or on any other personal E-Mail folder in the folder tree.

2. From the context menu select **Subscribe folder**. The **Subscribe folder** pop-up window opens.

3. Open the **User** folder tree in the **Subscribe folder** pop-up window. Activate the checkbox for the folder that you want to subscribe.

4. Click on **OK**.

Result: The subscribed folder is displayed in the folder tree.

8.6.5. Sharing folders

In order to share data with other users, share one or more folders. You can share a folder by granting other users particular rights for the folder. You can

- grant rights for a folder,

- change the rights for a folder,

- and delete the rights for a folder.

Note: Consider the following restrictions.

In order to grant rights for a folder to another user, you have to have the administrator right for that folder.

You can not share your personal **Inbox** folder. In order to grant other users access to your E-Mail messages, share an E-Mail folder that is located below your **Inbox** folder. This E-Mail folder has to be subscribed to by other users then, see 8.6.4: Subscribing to E-Mail folders.

You have the exclusive rights for your personal calendar, contacts, and tasks folders. You can not grant administrator rights for these folders to other users. Examples for practical settings can be found in 8.6.6: Which permission settings are practical?.

How to share a folder:

1. Right-click on the folder and select **Properties**. The groupware switches to the Options module. The folder properties are displayed in the overview window.

2. Switch to the **Rights** tab.

3. Click on **Add** in the **User** panel section. The **Select user** window opens.

4. Select one or more users or user groups from the list.

5. In order to add the user or user group selection, click the **Add** button next to Users.

6. In order to accept the selection, click on **OK**. The users are added to the list of users. They will get preset rights.

7. Select a newly added user.

8. In order to set the permissions, use the panel sections **Change right**, **Folder rights**, **Read rights**, **Modify rights**, and **Delete rights**. Examples for practical settings can be found in 8.6.6: Which permission settings are practical?.
   Note: When setting the rights for a personal folder, the functions in the **Change right** panel section are deactivated.

9. If need be, repeat the steps 3-8 to add further users.

10. In order to finish the process, click the **Save** icon in the panel.

Result: The folder is shared. It will be marked with the shared folder icon in the folder tree.

How to change the rights for a folder for individual users:

1. Right-click on the folder and select **Properties**. The groupware switches to the options module. The folder properties are displayed in the overview window.

2. Switch to the **Rights** tab. The users and rights are displayed.

3. Select a user.

4. In order to set new permissions, use the panel sections **Change right**, **Folder rights**, **Read rights**, **Modify rights**, and **Delete rights**. Examples for practical settings can be found in 8.6.6: Which permission settings are practical?.
   Note: When changing the rights for a personal folder, the functions in the **Change right** panel section are deactivated.

5. In order to finish the process, click the **Save** icon in the panel.

Result: The user permissions are changed.

How to remove user rights for a folder for individual users:

1. Right-click on the folder and select **Properties**. The groupware switches to the options module. The folder properties are displayed in the overview window.

2. Switch to the **Rights** tab. The users and their permissions are displayed.

3. Select a user.

4. Click on **remove** in the **User** panel section.

5. In order to finish the process, click the **Save** icon in the panel.

Note: In order to be able to remove the permissions for a folder for individual users, you have to be the folder administrator.

8.6.6. Which permission settings are practical?

The following examples are recommendations for practical settings.

Example 1: Viewing objects

A user should be able see the objects in a folder, but not to change or delete them. The user should not be able to create new objects.

The user needs to have the following permissions:

Change right	Folder rights	Read rights	Modify rights	Delete rights
No	Visible folder	All	None	None

Example 2: Viewing objects, creating own objects

A user should be able to see the objects in a folder but not to change or delete them. The user should be able to create and modify new objects.

The user needs to have the following permissions:

Change rights	Folder rights	Read rights	Modify rights	Delete rights
No	Visible folders	All	Own	Own

Example 3: Viewing objects, creating own objects

A user should not be able to see the objects in a folder. The user should be able to create and modify new objects though.

The user needs to have the following permissions:

Change rights	Folder rights	Read rights	Modify rights	Delete rights
No	Create objects	None	Own	Own

Example 4: Not viewing objects, creating own objects, creating subfolders

A user should not see the objects in your personal folder. The user should be able to create subfolders.

The user needs to have the following permissions:

Change right	Folder rights	Read rights	Modify rights	Delete rights
No	Create subfolder	All	Own	Own

Example 5: All permissions

A user should get all rights for a public folder. The user should be able to grant rights to other users.

The user needs to have the following permissions:

Change right	Folder rights	Read rights	Modify rights	Delete rights
Admin	Create subfolder	All	All	All

8.7. Publish&Subscribe

8.7.1. What is the purpose of publish&subscribe?

Publish&subscribe enables you to easily exchange data between users and different applications. The users are

- internal Open-Xchange Server users,
- external users without Open-Xchange account.

Applications are

- the Open-Xchange Server,
- various social networks like XING or LinkedIn.

Goals and features of publish&subscribe:

- Data from different social networks can be re-used.
- The Open-Xchange Server combines the data from the social networks.
- The data format is based on HTML and can be displayed by standard browsers without any further tools. The data format is called OXMF.

Hint: The OXMF data format can vary depending on the Open-Xchange Server version. Thus it is possible that not all data are exchanged between the different versions.

Particular contact data from XING can be exchanged with external partners in the following way:

- By using the **Subscribe** function your XING contacts can be imported to a contact folder.
- If needed, use the Open-Xchange Server functions to edit or restructure the contacts.
- Create a folder that contains the contacts that should be made available to external partners.
- By using the **Publish** function the contacts in this folder are made available. The **Publish** function provides a URL that can be sent to external partners by E-Mail.

8.7.2. Which data is supported ?

You can import the following data in a contact folder by using the **Subscribe** function:

- XING! contacts
- LinkedIn contacts
- Facebook contacts
- Google Mail contacts
- Web.de contacts
- Yahoo.com contacts
- GMX contacts

With the **Subscribe** function you can import the following data in a calendar folder:

- Appointments from your Google calendars.
  Note: Exceptions to serial appointments are currently not supported.

You can publish the following folders:

- Contact folders
- InfoStore folders

8.7.3. Subscribing to data

How to subscribe to data:

1. Right-click a folder and select **Properties** from the context menu. The folder properties are displayed in the overview window.

2. Switch to the **Subscriptions** tab.

3. In the panel section **Subscriptions** click **Add**.

4. Select the subscription source from the **Source** drop-down list.

5. Enter the access data for the subscription source i.e., access data, URL.

6. If you want to subscribe to data from additional sources for the selected folder, repeat steps 3-5.

7. In the panel click **Save**.

To retrieve the data click **Refresh** in the panel.

Tip: You can also subscribe to data by right-clicking on a folder and selecting **Subscribe** from the **Extended** submenu.

Tip: You can also subscribe to data by using the setup wizard. Information can be found in 8.2.12: Using the Setup Wizard.

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Tip: You can also publish data by right-clicking on a folder and selecting **Publish** from the **Extended** submenu.

Tip: You can also publish data by using the setup wizard. Information can be found in 8.2.12: Using the Setup Wizard.

How to delete a subscription:

1. Right-click on a folder and select **Properties**. The folder properties are displayed in the overview window.

2. Switch to the **Subscriptions** tab.

3. Select a subscription under **Name** in the overview window.

4. In the **Subscriptions** panel section click **Remove**.

5. Click **Yes** in the confirmation dialog.

8.7.4. Publishing data

Privacy

When using this publish feature, you as the current owner of the data are responsible for being careful with privacy rules and for complying with legal obligations (Copyright, Privacy Laws).

Especially when publishing personal data you are the responsible party according to the Federal Data Protection Act (BDSG, Germany) or other Privacy Acts of your country.

According to European and other national regulations you as the responsible party are in charge of data economy, and must not publish or forward personal data without the person's consent.

Beyond legal obligations, Open-Xchange would like to encourage extreme care when dealing with personal data. Please carefully consider where you store and to whom you forward personal data. Please ensure appropriate access protection, e.g.: by proper password protection.

How to publish data from a folder:

1. In the context menu of a folder click on **Properties**. The folder properties are displayed in the overview window.

2. Switch to the **Publications** tab.

3. In the **Publications** panel section click **Add**.

4. Choose the necessary target from the **Select a target** drop-down field:

   When publishing a contact folder select **OXMF Contacts**.

   When publishing an InfoStore folder select **OXMF InfoStore**.

5. Enter a name for the publication (e.g.: your name) in the **Site** input field.

6. To change the layout of the published data, enter a name in the **Template (optional)** input field. Further information can be found in 8.7.4.1: Customizing the template.

7. To prevent the URL from being guessed by others, activate the **Add cipher code** checkbox. By doing so a random character string is added to the URL, i.e.: the URL cannot be guessed.

8. Click on the panel entry **Save**.

Result: The folder is published. It will be marked with the published folder icon in the folder tree. Next to **URL**, a URL for accessing the published folder is displayed.

Tip: You can also publish data by right-clicking on a folder and selecting **Publish** in the **Extended** sub-menu.

How to remove a publication:

1. Right-click on a folder and select **Properties**. The folder properties are displayed in the overview window.

2. Switch to the **Publications** tab.

3. Select a publication under **Name** in the overview window.

4. In the **Publications** panel section click **Remove**.

5. Click on **Yes** in the confirmation dialog.

8.7.4.1. Customizing the template

The layout of the web page containing your published data is set by a template. You can customize the web page layout by modifying the template. If you do not modify the template the default template is used.

In order to customize a template the following actions are required:

- Entering a template file name when publishing
- Downloading the template from the personal InfoStore folder
- Customizing the templates with a text editor
- Uploading the customized template to the InfoStore

Note: Customizing a template requires knowledge in web design, especially in HTML and CSS. If a faulty template is used, your published data might no longer be displayed.

How to customize a template:

1. Right-click on a folder and select **Properties**. The folder properties are displayed in the overview window.

2. Switch to the **Publications** tab.

3. Enter a file name for the template in the **Template (optional)** input field.

4. Click on the panel entry **Save**.
   Result: Your personal InfoStore folder contains the template in the OXMF Templates folder. The template has the name entered by you in step 2.
   Note: Prior to being able to see the template you have to retrieve the objects from the server by clicking the Refresh button in the title bar.

5. Download the template from the InfoStore. Edit the template with a text editor. Information on the content of the template can be found later in this section.

6. Upload the modified template as a new, current document version to the InfoStore.

Result: The page with the published data is displayed with the modifications.

Note: In order to view the changes, the page has to be reloaded.

Tip: You can also directly modify the template by using WebDAV.

Information on the template structure: A template is written in HTML. It consists of the following sections:

- Macros
- Page layout in XHTML format
  - Layout defined with CSS
  - HTML contents

8.8. Social Messaging

8.8.1. What is the purpose of Social Messaging?

Social Messaging offers the ability to simply subscribe to messages from different sources in the Groupware GUI. You can

- subscribe to message sources,
- read messages,
- send messages.

8.8.2. Which message sources are supported?

The following message sources are supported:

- Twitter
- RSS feeds
- Facebook

8.8.3. Subscribing to message sources

How to access the functions for subscribing to message sources:

1. Click the **Settings** icon ❄ in the module bar 🏠 🐦 🗓 📇 📅 📧 ❄ .
2. In the folder tree click on the **E-Mail** subfolder **Messaging**.

Result: The available message sources are displayed in the overview window. The left pane shows the available message sources. The right pane shows the settings of the respective message source.

How to subscribe to a message source:

1. In the **Accounts** panel section click on **Add**.
2. Enter a name in the **Name** input field.
3. Select the message source from the **Type** drop-down list.
4. Enter the required data for the respective message source:

    When selecting Twitter or Facebook, enter your access data for Twitter or Facebook.

    When selecting RSS Feed, enter the url. The url can be found on the web page of the RSS feed provider.

5. Click the **Save** icon in the panel.

Result: A new folder is created below the **E-Mail** subfolder of your personal root folder. The new folder will have the name you entered in step 2.

How to edit the settings of a message source:

1. Select a message source from the **Account** pane.
2. Change the data in the right pane.
3. Click the **Save** icon in the panel.

How to delete a message source:

1. Select a message source from the **Account** pane.

2. In the **Accounts** panel section click on **Remove**.

8.8.4. Reading and sending messages

You will find the subscribed message sources in the folder tree below your personal root folder.

How to read the messages from a subscribed message source:

In the folder tree click on the message source folder in your personal root folder.

Result: The messages are displayed in the overview window.

Tip: Some messages can contain clickable hyperlinks.

Some message sources, like Twitter, allow you to send short messages.

How to send a message with Twitter:

1. In the folder tree click on the Twitter message source folder in your personal root folder.

2. Click the icon in the **New** panel section. The **New message** window opens.

3. Enter a message.

4. Click on **Send**.

Result: The new message will be sent.

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