

**Documents**  
**User Guide**



## **Documents: User Guide**

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# 1 About This Documentation

The following information will help you make better use of the documentation.

- [Who is the Target Group for this Documentation?](#)
- [Which Contents are Included in the Documentation?](#)
- [Further Help](#)

## **Who is the Target Group for this Documentation?**

This documentation is addressed to end users who want to create and edit Office documents from within the groupware and who want to share them with others. This documentation has been written under the assumption that the end user is familiar with editing text documents and spreadsheets.

## **Which Contents are Included in the Documentation?**

This documentation includes the following information:

- In *What is Documents for?* you will find a short description of Documents.
- In *Text* you will find instructions for using the Text app.
- In *Spreadsheet* you will find instructions for using the Spreadsheet app.
- In *Templates* you will find instructions for using text and spreadsheet templates.
- In *Collaboration* you will find notes and instructions for collaborating with other users.

This documentation describes working with a typical groupware installation and configuration. The installed version and the configuration of your groupware might differ from what is described here.

## **Further Help**

A comprehensive groupware documentation can be found in the Groupware User Guide.



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## 2 What is Documents for?

*Documents* offers various functions for editing Office documents from within the groupware.

- Use formatted text documents for your correspondence. Use tables and images within the documents.
- Use spreadsheets in the native Microsoft Excel format in order to work with figures, spreadsheets and formulas.
- Edit a document together with other users.
- Make use of the other groupware apps to organize your documents, to send them by E-Mail or share them with users or external partners.

In *Documents*, the following apps are available:

- The [Text \[9\]](#) app for creating and editing text
- The [Spreadsheet \[23\]](#) app for creating and editing spreadsheets.



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## 3 Text

Learn how to work with the *Text* application.

- The [Text Components](#)
- The [Text Edit Page Components](#)
- [create](#) new text documents
- [open](#) existing text documents
- [edit](#) text documents
- [edit a document under a new name](#)

In order to search for text files, organize them or share them with other users, use the *Drive* application.

### **How to launch the *Text* app:**

Click on **Text** in the menu bar.

## 3.1 The *Text* Components

The *Text* app includes the following components.

- [Toolbar](#)
- [Recent documents](#)
- [New from template](#)

### Toolbar

Contains the following functions:

- **New text document** button. Creates a [new text document](#) [17].
- **Open document** button. Opens an [existing document](#) [19].

### Recent documents

Contains a list of recently opened documents. The following functions are available.

- If the cursor hovers over a document name, the file name and the document's path are displayed.
- If clicking on a document, the document will be opened.
- A document's context menu contains functions for editing, downloading and for organizing the list.

### New from template

Contains a list of templates for various documents. The following functions are available.

- If clicking on a template, a new document will be created. The new document will be a copy of the template.
- A template's context menu contains functions for editing the template and for creating documents.

When creating a new text document or editing an existing text document, the [Edit text page](#) opens.

## 3.2 The *Text* Edit Page Components

The *Text* Edit page contains the following components.

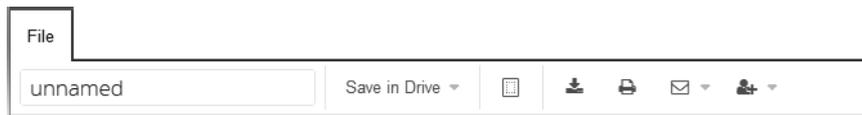
- Office menu bar
- *File* toolbar
- *Format* toolbar
- *Insert* toolbar
- *Table* toolbar
- *Image* toolbar
- *Shape* toolbar
- *Review* toolbar
- Document window

**Note:** When having a small screen width, a compact toolbar is displayed. In the compact toolbar, some text is replaced with icons. Multiple menu items are combined in scrollbars.

### Office menu bar

The Office menu bar includes the following elements:

- **File** tab. Shows the *File toolbar* that allows to apply file functions.
- **Format** tab. Shows the *Format toolbar* that allows to format the document's content.
- **Insert** tab. Shows the *Insert toolbar* that allows to insert tables, images, text frames, hyperlinks, tab stops, line or page breaks in the text.
- Notifications about saving processes. Notify whether all changes in the document have been saved.
- **Review** tab. Shows the *Review toolbar* that allows to use spell checking tools and tools for tracking changes.
- **Revert** icon . Reverts the last operation.
- **Recover** icon . Recovers the last reverted operation.
- **Toggle Search** icon . Displays control elements for searching for or replacing text strings.
- **View** button. Opens a menu with the following entries:
  - Functions for zooming in or zooming out the text.
  - **Show toolbars** checkbox. Defines whether the toolbars are always displayed.
  - **Show collaborators** checkbox. Defines whether the document editors list is displayed. This function is only activated if you [edit the document together with other users \[44\]](#).
- **Close document** icon . Closes the Format window.

**File toolbar**

Contains the following tools:

- **Rename document** input field. To rename the document, click on the file name.
- **Save in Drive** button. Opens a menu with the following entries:
  - **Save as**. Saves the selected document under a different name or in another folder.
  - **Save as template**. Saves the selected document as template.
  - **Export as PDF**. Exports the selected document in PDF format.
  - **AutoSave** checkbox. Defines whether the document gets saved automatically in regular intervals.
- **Page settings** icon . Opens the *Page settings* dialog window. The dialog window contains page configuration tools.
  - Default values for paper formats, page orientation, page margins
  - Input fields for paper size, page margins
- **Download** icon . Downloads the selected document.
- **Print as PDF** icon . Generates a PDF version of the current document.
- **Send as mail** icon . Opens a menu with the following entries:
  - **Attach document to mail**. Sends the selected document as an E-Mail attachment.
  - **Attach as pdf to Mail**. Sends the selected document as an E-Mail attachment in pdf format.
  - **Send content as mail**. Sends the formatted content of the current document as E-Mail in html format.
- **Share** icon . Opens a menu with the following entries:
  - **Invite people**. Displays functions for inviting other users to read or edit the document.
  - **Get link**. Displays functions for sharing the document with the help of a link.

**Format toolbar**

Contains the following tools:

- character formatting tools
  - font family, font size
  - emphasis
  - more font styles, clear formatting
  - text color, text highlight color
- paragraph formatting tools
  - paragraph alignment, line spacing, paragraph spacing
  - paragraph fill color, paragraph borders
  - paragraph style, create new style
  - bullet list, numbered list, demote one level, promote one level

### Insert toolbar



The following elements are available.

- **Insert table** button.
- **Insert image** button.
- **Insert text frame** button.
- **Insert comment** button. A comment field is displayed at the document's margin. In addition to the comment text, it contains the following:
  - the editor's name
  - the comment's creation date and time
  - icons for editing or deleting the comment
 Functions for hiding and showing comments can be found in [Review toolbar \(page 16\)](#).

- **Insert or edit hyperlink** button
- **Insert tab stop**, **Insert line break**, **Insert page break** buttons
- **Insert header & footer in document** button Opens an area on top of the page where you can enter the header text. Further elements are displayed below the header.
  - **Header** button. Opens a menu with the following entries:
    - Settings that allow you to define whether different headers should be used for certain parts of the document. Depending on the selected setting, the caption of the **Header** button changes.
    - Removing all headers and footers in the entire document.
  - **Go to footer** button. Opens an area at the bottom of the page where you can enter the footer text.
  - **Close** button. Finishes the editing of the header or footer.
- **Insert field** button. Opens a menu with functions for inserting fields:
  - author name, file name
  - time, date
  - page number, number of pages

### Table toolbar



If the cursor is located within a table, the *Table* toolbar is displayed. It contains the following tools:

- insert row, delete selected rows, insert column, delete selected columns
- split table
- select cell fill color, select cell borders, select cell border width
- assign table style A table style consists of predefined cell borders and fill colors for specific table cells and rows.

### Image toolbar



If an image has been selected, the *Image* toolbar will be displayed. It contains the following tools:

- delete image
- Adjust position. Defines whether the image is anchored inline, to a paragraph or to the page.
- Adjust the position. If the image is anchored to a paragraph or a page, you can define the text wrapping.
- Reorder. Defines the order of images and text frames that overlay each other.
- Adjust the border style and color for the image frame.

### ***Shape* toolbar**



If a text frame has been selected, the *Shape* toolbar will be displayed. It contains the following tools:

- Delete text frame
- Adjust position. Defines whether the text frame is anchored inline, to a paragraph or to the page.
- Adjust the position. If the text frame is anchored to a paragraph or a page, you can define the text wrapping.
- AutoAdjust. Defines whether the text frame height is automatically adjusted to the content.
- Reorder. Defines the order of images and text frames that overlay each other.
- Adjust the border style and color for the text frame border.
- Adjust the background color for the text frame's content.

### Review toolbar



The following elements are available.

- **Check spelling permanently** icon. Activates the spell check while entering text. You can use the context menu to add words that are marked as unknown to the user dictionary. Functions for editing the dictionary can be found in [The Text Settings \(page 21\)](#)
- Selection of the document's language or of the selected paragraph.
- **Track changes** button. Enables or disables the change tracking. Further buttons for handling changes are available:
  - accepting the selected change or all changes
  - rejecting the selected change or all changes
  - selecting the previous or the next change
- **Insert comment** button. Inserts a comment at the current cursor position. A comment field is displayed at the document's margin. In addition to the comment text, it contains the following:
  - the editor's name
  - the comment's creation date and time
  - icons for editing or deleting the comment
 The function for inserting comments can also be found in the [Insert toolbar \(page 14\)](#).
- **Highlight comments mode** button. Opens a menu that allows to define the visibility of comments.
  - Highlight the current comment or all comments
  - Display comments as bubbles
  - Display no comments
  - Only display comments by a certain author, display comments by each author
- **Show previous comment** and **Show next comment** buttons. Select the previous or next comment.
- **Delete all comments** button. Deletes all comments in the document.

### Document window

The document window is centrally located. It lets you create and edit the document's content.

## 3.3 Creating Text Documents

You can create text documents containing formatted text, tables, and images. In order to create a new text document, you can proceed as follows:

- create a text document [in the \*Text\* app](#)
- create a text document [in the \*Drive\* app](#)

You can also use a template.

### How to create a new text document in the *Text* app:

1. To create a new text document without using a template, click on **New text document** in the toolbar in the *Text* app.

To use a template, use one of the following methods:

- Click on a template in *New from Template*.
- Open a template's context menu. Select **New from Template**.

Information on templates can be found in [Templates \(page 35\)](#).

The document is shown on the *unnamed* page.

2. Click on **unnamed** in the **File** toolbar. Enter a name.  
Now you can [create and edit \[19\]](#) the content.
3. To finish, click the **Close document** icon  on the right side of the Office menu bar.

### How to create a new text document in the *Drive* app:

1. Launch the *Drive* app.
2. Open a folder in the folder tree.  
**Note:** Open a folder for which you have the appropriate permissions to create objects.
3. To create a new text document without using a template, click on **New** in the toolbar. Click on **New text document**.

To use a template, use one of the following methods:

- Double-click on the template.
- Select a template. Click on **New from template** in the toolbar.
- Open the template in the *Viewer*. Click on **New from template**.

4. Click on **unnamed** in the **File** toolbar. Enter a name.  
Now you can [create and edit \[19\]](#) the content.
5. To finish, click the **Close document** icon  on the right side of the office menu bar.

## 3.4 Opening Text Documents

You can open text documents that are saved in Drive or on a local drive. There are the following options:

- open a text document [in the \*Text\* app](#)
- open a text document [in the \*Drive\* app](#)
- open a [locally saved text document](#)

### How to open a text document in the *Text* app:

Use one of the following methods:

- To open a frequently used document, click on a document in *Recent documents*.

You can also open a document's context menu. Select **Edit**.

**Tip:** You can use the context menu to remove documents from the list of recently opened documents.

- In order to open another document, click on **Open document** in the toolbar. Select a text document in the *Open document* window. Click on **Open**.

### How to open a text document in the *Drive* app:

Use one of the following methods:

- Select a text document. Click on **Edit** in the toolbar.
- Double-click on a text document.
- Open the text document in the *Viewer*. Click on **Edit**.

### How to open a locally saved text document:

1. In the *Text* app, click on **Open Document** in the toolbar.

In the *Open document* window, select a folder for which you have the appropriate permissions to create objects.

2. Click on **Upload local file**. Select a text document. Click on **OK**.

**Result:** The document is uploaded to *Drive*. Then, the document will be opened.

## 3.5 Editing Text Documents

When editing text documents, you can do the following:

- edit text, format characters, format paragraphs
- Insert various elements, e.g. tables, images, text frames, headers and footers, page number
- check the spelling, use comments
- downloading or printing the selected document or sending it in an E-Mail
- searching and replacing text

### How to edit a text document:

**Note:** In order to edit a document, you need to have editing permissions for the *Drive* folder containing the document.

1. Create a [new text document \[17\]](#) or [open \[18\]](#) an existing document.
2. To edit the text document, use the common techniques from the familiar Office applications. To format characters or paragraphs or to edit cells, use the functions in the [Format toolbar](#). To create a new paragraph style from the paragraph at the current cursor position, select **Create new style** from **Paragraph style**.

To insert various elements, use the [Insert toolbar](#). Those elements can be inserted:

- table, image, text frame, comment, hyperlink
- tab stop, line break, page break
- header, footer
- Fields with automatically created contents like author name, file name, date, time, page number, number of pages

In order to edit a field's content, click into the field. Depending on the field, different editing possibilities are available.

To check the spelling, track changes or manage comments, use the [Check toolbar](#) functions.

**Tip:** Many functions can also be activated in the context menu.

**Note:** All changes are immediately saved.

3. To rename, save, download or print the selected text document or to send it in an E-Mail, use the functions in the [File toolbar](#).
4. To search and replace text elements, click the **Toggle search** icon  on the right side of the Office menu bar. Control elements for searching and replacing will be shown.
5. To finish editing and to close the text document, click the **Close document** icon  on the right side of the Office menu bar.

## 3.6 Editing Text Documents Under a New Name

You can create a new document as copy of an existing document. There are the following options:

- Edit a recently used document under a new name
- Edit any document under a new name

### How to edit a recently used document under a new name:

1. In the *Text* app you can open a document's context menu under *Recent Documents* Select **Edit as new**. The document will be opened for editing.
2. Click on **unnamed** in the **File** toolbar. Enter a name.  
Now you can [create and edit \[19\]](#) the content.

### How to edit a document under a new name:

1. Launch the *Drive* app.
2. Open a folder containing documents, in the folder tree.  
**Note:** Open a folder for which you have the permission to create objects.
3. Open the document in the *Viewer*. Click the **More** icon . Select **Edit as new**. The document will be opened for editing.
4. Click on **unnamed** in the **File** toolbar. Enter a name.  
Now you can [create and edit \[19\]](#) the content.

## 3.7 The Text Settings

### How to use the documents settings:

1. Click the **System menu** icon  on the right side of the menu bar. Click the **Settings** menu item.
2. In the sidebar, click on **Documents**.
3. Change the settings.

The following settings are available.

### Measurements

Defines the measurements for paper size, page margins, line height, column width.

### User dictionary

If clicking on **Edit user dictionary**, the *User dictionary* window opens. You can add words to the dictionary or remove words from it.

### My template folders

Shows you template folders. Allows to add further template folders. If clicking on a template folder, the folder will be opened in the *Drive* app. Information on templates and instructions can be found in [Templates](#) (page 35).

### Global template folders

Shows the global template folders. If clicking on a template folder, the folder will be opened in the *Drive* app.



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## 4 Spreadsheet

Learn how to work with the *Spreadsheet* application.

- The [Spreadsheet Components](#)
- The [Spreadsheet Edit Page Components](#)
- [create](#) new spreadsheets
- [open](#) existing spreadsheets
- [edit](#) spreadsheets
- [edit a spreadsheet under a new name](#)

In order to search for spreadsheets, organize them or share them with other users, use the *Drive* application.

### **How to launch the *Spreadsheet* app:**

Click on **Spreadsheet** in the menu bar.

## 4.1 The *Spreadsheet* Components

The *Spreadsheet* app includes the following components.

- [Toolbar](#)
- [Recent documents](#)
- [New from template](#)

### Toolbar

Contains the following functions:

- **New spreadsheet** button. Creates a [new spreadsheet](#) [30].
- **Open document** button. Opens an [existing document](#) [32].

### Recent documents

Contains a list of recently opened documents. The following functions are available.

- If the cursor hovers over a document name, the document's path is displayed.
- If clicking on a document, the document will be opened.
- A document's context menu contains functions for editing, downloading and for organizing the list.

### New from template

Contains a list of templates for various documents. The following functions are available.

- If clicking on a template, a new document will be created. The new document will be a copy of the template.
- A template's context menu contains functions for editing the template and for creating documents.

When creating a spreadsheet or editing an existing spreadsheet, the [Spreadsheet edit text page](#) opens.

## 4.2 The *Spreadsheet* Edit Page Components

The *Text* Edit page contains the following components.

- Office menu bar
- *File* toolbar
- *Format* toolbar
- *Data* toolbar
- *Insert* toolbar
- *Rows/Columns* toolbar
- *Image* toolbar
- *Chart* toolbar
- Document window

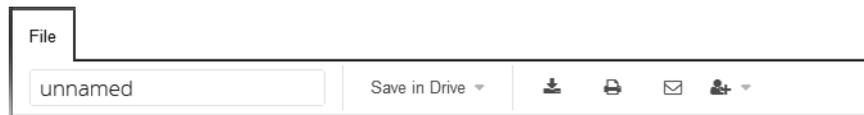
**Note:** When having a small screen width, a compact toolbar is displayed. In the compact toolbar, some text is replaced with icons. Multiple menu items are combined in scrollbars.

## Office menu bar

The Office menu bar includes the following buttons:

- **File** tab. Shows the *File toolbar* that allows to apply file functions.
- **Format** tab. Shows the *Format toolbar* that allows to format the document's content.
- **Data** tab. Shows the *Data toolbar* that allows to sort or filter data.
- **Insert** tab. Shows the *Insert toolbar* that allows to insert objects like images, tables or hyperlinks in the text.
- **Rows/Columns** tab. Shows the *Rows/Columns toolbar* that allows to use tools for editing rows and columns.
- **Revert** icon . Reverts the last operation.
- **Recover** icon . Recovers the last reverted operation.
- **Toggle search** icon . Displays control elements for searching for or replacing text strings.
- **View** button. Opens a menu with the following entries:
  - Functions for zooming in or zooming out the spreadsheet.
  - **Split table** button. Splits the sheet above and left of the current cursor position.
  - **Freeze sheet** button. Freezes the rows above and the columns left of the cursor.
  - **Show toolbars** checkbox. Defines whether the toolbars are always displayed.
  - **Show collaborators** checkbox. Defines whether the document editors list is displayed. This function is only activated if you [edit the document together with other users \[44\]](#).
  - **Show grid lines** checkbox. Defines whether grid lines are displayed.
  - **Show sheet tabs** checkbox. Defines whether tabs for additional sheets are displayed below the spreadsheet.
- **Close document** icon . Closes the Format window.

### File toolbar



Contains the following tools:

- **Rename document** input field. To rename the document, click on the file name.
- **Save in Drive** button. Opens a menu with the following entries:
  - **Save as**. Saves the selected document under a different name or in another folder.
  - **Save as template**. Saves the selected document as template.
  - **Export as PDF**. Exports the selected document in PDF format.
  - **AutoSave** checkbox. Defines whether the document gets saved automatically in regular intervals.
- **Download** icon  . Downloads the selected document.
- **Print as PDF** icon  . Generates a PDF version of the current document.
- **Send as mail** icon  . Sends the selected document as an E-Mail attachment.
- **Share** icon  . Opens a menu with the following entries:
  - **Invite people**. Displays functions for inviting other users to read or edit the document.
  - **Get link**. Displays functions for sharing the document with the help of a link.

### Format toolbar



Contains the following:

- character formatting tools
  - font family, font size
  - emphasis
  - more font styles, clear formatting
  - format painter
  - text color
- cell formatting tools
  - background color
  - horizontal alignment, vertical alignment, automatic word wrap, merge or unmerge cells
  - currency formatting in percentage terms
  - Number format. Defines the cell content's format, e.g. number.
  - Format codes. Defines the subformat, e.g. the number of decimal places.
  - cell border, border style, border color
  - cell style

**Data toolbar**

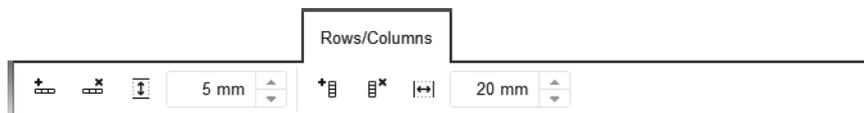
Contains the following:

- Tools for sorting the selected cells
- Tools for filtering the selected cells
- Tools for creating, editing or displaying named ranges. Within formulas, named ranges can be used instead of the original cell addresses.

**Insert toolbar**

Contains the following tools:

- calculate the sum of the selected cells
- Insert a function. Clicking on it opens the *Insert Function* window. The window displays the available functions. If clicking on a function, a function description is displayed.
- insert or edit hyperlink
- insert image
- insert a chart

**Rows/Columns toolbar**

Contains the following tools:

- insert row, delete selected row, set the row height
- insert column, delete selected column, set the column width

**Image toolbar**

If an image has been selected, the *Image* toolbar will be displayed. It contains the following tools:

- delete image
- set border style, set border color

**Chart toolbar**

If a chart has been selected, the *Chart* toolbar will be displayed. It contains the following tools:

- delete chart
- define chart type, e.g. column, line, pie
- set labels for axes, set colors, select style set
- set labels and colors for data points
- hide or show legend, set legend position
- adjust data source

**Document window**

The document window is centrally located. It lets you create and edit the document's content.

## 4.3 Creating Spreadsheets

You can create spreadsheets containing formatted tables and images. In order to create a spreadsheet, you can proceed as follows:

- create a spreadsheet [in the \*Spreadsheet\* app](#)
- create a spreadsheet [in the \*Drive\* app](#)

You can also use a template.

### How to create a new spreadsheet in the *Spreadsheet* app:

1. To create a new spreadsheet without using a template, click on **New spreadsheet** in the toolbar in the *Spreadsheet* app.

To use a template, use one of the following methods:

- Click on a template in *New from Template*.
- Open a template's context menu. Select **New from Template**.

Information on templates can be found in [Templates \(page 35\)](#).

The spreadsheet is shown on the *unnamed* page.

2. Click on **unnamed** in the **File** toolbar. Enter a name.  
Now you can [create and edit \[32\]](#) the content.
3. To finish, click the **Close document** icon  on the right side of the Office menu bar.

### How to create a new spreadsheet in the *Drive* app:

1. Launch the *Drive* app.
2. Open a folder in the folder tree.  
**Note:** Open a folder for which you have the appropriate permissions to create objects.
3. To create a new spreadsheet without using a template, click the **New** icon in the toolbar. Click on **New spreadsheet**.  
To use a template, use one of the following methods:
  - Double-click on the template.
  - Select a template. Click on **New from template** in the toolbar.
  - Open the template in the *Viewer*. Click on **New from template**.
4. Click on **unnamed** in the **File** toolbar. Enter a name.  
Now you can [create and edit \[32\]](#) the content.
5. To finish, click the **Close document** icon  on the right side of the Office menu bar.

## 4.4 Opening Spreadsheets

You can open spreadsheets that are saved in Drive or on a local drive. There are the following options:

- open a spreadsheet in the *Spreadsheet* app
- open a spreadsheet in the *Drive* app
- open a [locally saved spreadsheet](#)

### How to open a spreadsheet in the *Spreadsheet* app:

Use one of the following methods:

- To open a frequently used document, click on a document in *Recent documents*.

You can also open a document's context menu. Select **Edit**.

**Tip:** You can use the context menu to remove documents from the list of recently opened documents.

- In order to open another document, click on **Open document** in the toolbar. Select a spreadsheet in the *Open document* window. Click on **Open**.

### How to open a spreadsheet in the *Drive* app:

Use one of the following methods:

- Select a spreadsheet. Click on **Edit** in the toolbar.
- Double-click on a spreadsheet.
- Open the spreadsheet in the *Viewer*. Click on **Edit**.

### How to open a locally saved spreadsheet:

1. In the *Spreadsheet* app, click on **Open Document** in the toolbar.

In the *Open document* window, select a folder for which you have the appropriate permissions to create objects.

2. Click on **Upload local file**. Select a spreadsheet. Click on **OK**.

**Result:** The document is uploaded to *Drive*. Then, the document will be opened.

## 4.5 Editing Spreadsheets

When editing spreadsheets, you can do the following:

- edit tables, format cells, sort or filter data
- insert elements, e.g. formulas, images, charts
- add rows and columns, add or delete tables
- downloading or printing the selected spreadsheet or sending it in an E-Mail
- searching and replacing text

### How to edit a spreadsheet:

**Note:** In order to edit a document, you need to have editing permissions for the *Drive* folder containing the document.

1. Create a [new spreadsheet \[30\]](#) or [open \[31\]](#) an existing spreadsheet.

2. To edit the document, use the common techniques from the familiar Office applications.

To format characters or paragraphs or to edit cells, use the functions in the [Format toolbar](#).

In order to sort or filter selected cells or to create named ranges, use the functions of the [Data toolbar](#).

To insert various elements, use the [Insert toolbar](#). Those elements can be inserted:

- sum functions or other functions
- hyperlink, image, chart

In order to insert, delete or format whole rows or columns, use the functions in the [Rows/Columns toolbar](#).

**Tip:** Many functions can also be activated in the context menu.

**Note:** All changes are immediately saved.

3. In order to add or delete a table or to change the tables' order, use the table tabs below the table.
4. To rename, save, download or print the selected spreadsheet or to send it in an E-Mail, use the functions in the [File toolbar](#).
5. To search and replace text elements, click the **Toggle search** icon  on the right side of the Office menu bar. Control elements for searching and replacing will be shown.
6. To finish editing and to close the spreadsheet, click the **Close document** icon  on the right side of the Office menu bar.

## 4.6 Editing Spreadsheets Under a New Name

You can create a new document as copy of an existing document. There are the following options:

- Edit a recently used document under a new name
- Edit any document under a new name

### How to edit a recently used document under a new name:

1. In the *Spreadsheet* app you can open a document's context menu under *Recent Documents* Select **Edit as new**. The document will be opened for editing.
2. Click on **unnamed** in the **File** toolbar. Enter a name.  
Now you can [create and edit \[32\]](#) the content.

### How to edit a document under a new name:

1. Launch the *Drive* app.
2. Open a folder containing documents, in the folder tree.  
**Note:** Open a folder for which you have the permission to create objects.
3. Open the document in the *Viewer*. Click the **More** icon . Select **Edit as new**. The document will be opened for editing.
4. Click on **unnamed** in the **File** toolbar. Enter a name.  
Now you can [create and edit \[32\]](#) the content.

## 4.7 The Spreadsheet Settings

Information on settings can be found in [The Text Settings \(page 21\)](#).

---

## 5 Templates

Learn how to work with templates.

- When creating a new document, you can [use an existing template \[36\]](#).
- You can [create a new template \[37\]](#) from the document that you currently edit.
- You can [edit \[38\]](#) existing templates.
- You can [organize \[39\]](#) templates in folders.

## 5.1 Using Templates

Depending on the server configuration, different global templates are available for text documents or spreadsheets. You can also [create own templates \[37\]](#).

### How to use a template when creating a new document:

In the *Text* or the *Spreadsheet* app, use one of the following methods:

- Click on a template in *New from Template*.
- Open a template's context menu. Select **New from Template**.

In the *Drive* app, use one of the following methods:

- Double-click on the template.
- Select a template. Click on **New from template** in the toolbar.
- Open the template in the *Viewer*. Click on **New from template**.

The new document is shown on the *unnamed* page.

## 5.2 Creating Templates

You can create own templates by saving the document that you currently edit as new template. The new template will be saved below *My files* in the *Drive* app. You can [organize \[39\]](#) your own templates in template folders.

### How to create a new template:

1. Open an existing document or create a new one in the *Text* or *Spreadsheet* app.  
**Tip:** In order to change a global template, create the new template from the global template that you want to change.
2. In the **File** toolbar, click on **Save in Drive**. Select **Save as template**. The *Save as template (.dotx)* dialog window opens.  
Select a template folder.  
Enter a file name. Click on **OK**.
3. Edit the content according to your wishes.
4. In order to finish the editing of the template, click the **Close document** icon 

Similar actions

[How to create a new template folder: \(p. 39\)](#)

## 5.3 Editing Templates

You can edit own templates. You can [organize \[39\]](#) your own templates in template folders.

### How to edit an existing template:

1. Open a template's context menu under *New from Template* in the *Text* or the *Spreadsheet* app. Select **Edit template**.

In the *Drive* app, use one of the following methods:

- Select a template. Click the **Actions** icon  in the toolbar. Click on **Edit template** in the menu.
- Open the template in the *Viewer*. Click the **Actions** icon  in the toolbar. Click on **Edit template** in the menu.

2. Edit the content according to your wishes.

3. In order to finish the editing of the template, click the **Close document** icon .

Similar actions

[How to create a new template folder: \(p. 39\)](#)

## 5.4 Organizing Templates

In order to keep the overview, you can organize own templates in template folders. When creating a new document, all templates matching the document type will be displayed from all template folders. There are the following options:

- **create** a new template folder by defining a folder as template folder
- **delete** a template folder
- **open** the folder containing the template.

### How to create a new template folder:

1. In the *Drive* app, create the new personal folder that you want to use for the templates.  
If you have already created templates, you can move those templates to the new folder now.
2. Click the **System menu** icon  on the right side of the menu bar. Click the **Settings** menu item.
3. Select **Documents** from the sidebar.
4. In the display area, click on **Add new template folder**. Select the new folder. Click on **OK**. The new template folder will be saved below *Template folders*.

**Tip:** In order to open the template folder in the *Drive* app, click on the path below its name.

**Note:** In order to delete, move or rename own templates, use the *Drive* app functions.

### How to remove a template folder:

1. Click the **System menu** icon  on the right side of the menu bar. Click the **Settings** menu item.
2. Select **Documents** from the sidebar.
3. Click the **Delete** icon  next to a template folder in the display area.

**Note:** Neither the template folder nor the templates within will be deleted during this process. As a result of this process, the templates will no longer be displayed when creating new documents.

### How to open a template folder:

Open a template's context menu under *New from Template* in the *Text* or the *Spreadsheet* app. Select **Show in Drive**.

The folder containing the template is displayed in the *Drive* app.



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## 6 Collaboration

Learn how to work together with other users or external partners.

- [Share \[42\]](#) documents for other users or external partners with read or edit access.
- You can [edit a document together \[44\]](#) with other users or external partners in real time.

## 6.1 Sharing Documents

There are the following options:

- You can share a selected document with read access by [creating a public link](#). You can give this link to internal users or external partners. Everyone who gets this link can read the document.
- [Invite](#) internal users or external partners per E-Mail to a share. You define which permissions are granted for the document. The invitation E-Mail contains notes for accessing the document. If an external partner accesses the document, the partner will automatically be logged in as guest user.

## How to share the selected document with read access by using a public link:

Prerequisite: You have opened a document for editing purposes.

1. Click on **File** in the Office menu bar .

Click the **Share** icon  in the toolbar. Click on **Get a link**.

The window for sharing objects will be opened. It contains a public link for a read access to the share.

To insert the link into other applications, click the **Copy to clipboard** icon  next to the link.

2. You have the following options:

- In order to directly send the link per E-Mail, enter the respective E-Mail addresses. You can enter a message for the recipients.
- Per default, the data are shared with read access for an unlimited time. To set a time limit for the access to the shared data, enable **Expires in**. Select a time range.
- To protect the access with a password, enable **Password required**. Enter a password. If you send the public link per E-Mail, the E-Mail contains the password.

3. Click on **Close**.

Similar actions

[How to invite internal users or external partners to read or edit the selected document: \(p. 43\)](#)

## How to invite internal users or external partners to read or edit the selected document:

Prerequisite: You have opened a document for editing purposes.

1. Click on **File** in the Office menu bar .

Click the **Share** icon  in the toolbar. Click on **Invite people**.

A window opens. Existing permissions will be shown as a list.

2. Enter an E-Mail address in *Add people*. The E-Mail address will be added to the list as internal user, group or guest. Preset permissions are granted.

If required, enter a message.

3. You have the following options:

- To adjust a user role, click on the current user role **Viewer**. Select an entry from the menu.
- In order to remove a permission, click the **Action** icon  next to the name. Click on **Remove**.

4. Click on **Share**.

The recipient gets an E-Mail with a link. If the recipient clicks on the link, the document will be opened in the Viewer. If you granted edit permissions to a recipient, the recipient can open the document for editing purposes by clicking on **Edit** in the Viewer.

Similar actions

[How to share the selected document with read access by using a public link: \(p. 43\)](#)

## 6.2 Editing Documents together

Documents saved on the groupware server can be edited together with other users or with external partners in real time. To do so, the documents have to be saved in a public or shared folder. The users or external partners need to have write permissions for this folder. The following rules apply:

- The person who creates the document or opens it first, for the moment has editing permissions for the document. This person is called current editor. Each person who later opens the document gets read permissions. They are called viewers.
- The viewers can see all changes applied by the current editor.
- A viewer can become current editor by requesting editing permissions. As soon as the previous editor completes the changes, the server transfers the editing permissions to the new current editor.
- As soon as the current editor closes the document, a new version of the document is created on the server.

### How to edit a document together with other users:

1. Create a new document or open an existing document.  
Ensure that the users with whom you want to edit the document together have the required permissions for editing the document. Information and instructions can be found in the Groupware user guide, under the topic *Permissions*.
2. Inform other persons that you now want to edit the document together. The respective persons need to open the document. When having opened the document, the users can see who is currently editing the document.  
Each change you apply to the document will be visible to other users.  
Each user can see the cursors of the single other users. The cursors are highlighted with different colors. In order to view the name, hover over one of the cursors.  
**Tip:** In order to display a list of persons who opened the document, click on the Office menu item **View** and enable the **Show collaborators** checkbox. The current editor is displayed on top of the list.
3. The person who wants to edit the document has to click on **Edit** in the toolbar.
4. To finish, the current editor has to click the **Close document** icon  on the right side of the Office menu bar.

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