White Paper

Migration of the Home Area
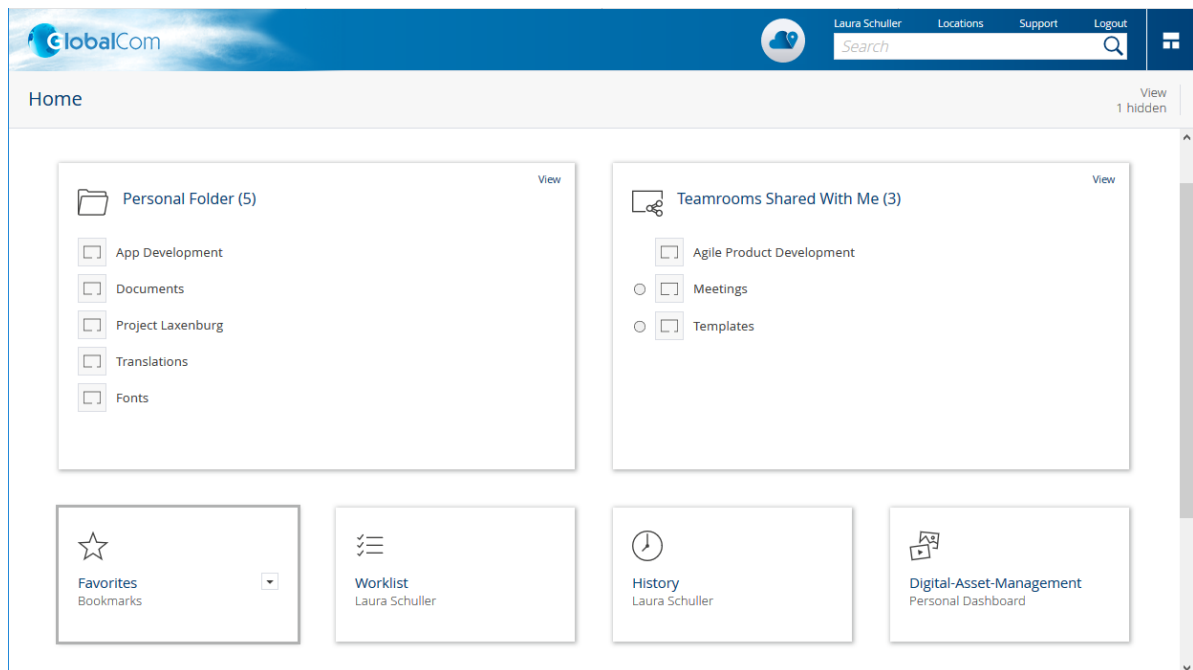
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Contents

1 Introduction

This document describes the new home area introduced with version 2018 November Release. Your Teamrooms and folders are automatically transferred to the new structure.

In certain cases, however, it is necessary that you take precautions to ensure a smooth transition. This is especially true when using the Fabasoft Cloud Folder, WebDAV (network drive) or CMIS.

2 The New Home Area

The newly designed home area offers you a better overview and a wide range of customization options.

The dashboard concept allows you to show or hide widgets, change their size and move them.

The following widgets are initially available to you, depending on your licensed Fabasoft Cloud Edition:

- Personal Folder
  In your personal folder, you can store Teamrooms that are important for you. The folder corresponds essentially to the previous "Home".

- Organization Folder
  Contains all standard Teamrooms of your organizations in which you are authorized.

- Teamrooms Shared With Me
  Contains all Teamrooms in which you are authorized as a team member. Teamrooms that you have created yourself are excluded from this list. For a better overview, the list is structured by years and months. Via the "Integrate in My Folder Hierarchy" action, you can add the desired Teamrooms to your personal folder, to your favorites or directly to "Home".
  Note: The transfer of the corresponding existing Teamrooms to this widget takes place automatically, but may take some time after the update.

- Favorites
  Favorites allow you to quickly access objects that you need repeatedly.

- Worklist
  Shows your worklist (availability depends on licensed edition).
- History
  Contains the most recently used objects and most recently sent e-mails.
- Other Dashboards
  Apps that offer their own dashboards are also displayed directly on "Home".

3 Your Seamless Transition

To help you find your way around the new home area, here are the most important questions and answers.

Where can I find my objects that were stored on "Home"?

- Folders, inboxes and Teamrooms that you stored directly on "Home" were automatically moved to your "Personal Folder".
- Standard Teamrooms of your organizations were automatically moved to your "Organization Folder".
- App dashboards (e.g. contact management), the worklist and cloud organization can still be accessed directly from "Home".

Where can I find the tool area?

The tool area is no longer needed directly on "Home". Therefore, it is only displayed in the corresponding context (e.g. in the personal folder).

Where can I find my history?

The "History" is now also available directly on "Home".

4 Customizing the Home Area Individually

The following options are available for customizing your home area:

- Show or hide widgets
  The "View" menu allows you to show or hide widgets (if allowed by your organization policy).
- Moving or resizing widgets
  You can move widgets using drag-and-drop or the context menu. You can also specify the size in the context menu of the widget.
- Storing objects on "Home"
  In addition to the widgets, you can also copy and paste important objects directly to "Home" (if allowed by your organization policy). More information can be found in chapter 5.6 "Storing Objects Directly on Home".

5 External Access

Note that the file paths will change when you access your new home area via the Cloud Folder or third-party products.

For example, the following use cases require manual adjustments:

- Documents with links to other documents via an absolute path

- Backups of specific file paths

In the following chapters, you will find suggestions for a smooth migration.

5.1 General Information

Folders, inboxes and Teamrooms that you have stored directly on "Home" are moved to the "Personal Folder" during the first access (Cloud Folder, WebDAV, CMIS). Standard Teamrooms of your organizations are automatically moved to your "Organization Folder".

The strings for "Personal Folder", "Organization Folder", etc. are determined according to the language set by the user. Note that the file paths change when you change the user language.

The following widgets are not available for external access to "Home":

- Favorites
- History
- Synchronized folder (if used)
  Exception: Is available when using WebDAV.

5.2 Access via the Fabasoft Cloud Folder

The Fabasoft Cloud Folder offers two types of synchronization:

- Entire Home
  When you synchronize your entire home, navigating through the folder structure in the file system automatically synchronizes the contents of the current folder.
- Dedicated Synchronized Folder
  If you use a dedicated synchronized folder, the entire contained folder hierarchy is synchronized to the file system by default.

Note that switching to the dedicated synchronized folder can significantly increase the amount of synchronized data because the entire contained hierarchy is synchronized to the file system.

Entire Home

The locally synchronized files are automatically moved according to the new home structure.

If stable file paths are required for your application, the following migration options are available:

- After the update, you can store the new path in your third-party applications accordingly. If necessary, deactivate the third-party applications during the cloud update.
- After the update, you can store the required structure on "Home" again (see chapter 5.6 "Storing Objects Directly on Home"). If necessary, deactivate the third-party applications during the cloud update.
- Before the update, you can set up a dedicated synchronized folder at a suitable time and store the required data in it (see chapter 5.7 "Setting Up a Dedicated Synchronized Folders"). The path to the dedicated synchronized folder is not changed with the cloud update. This allows you to store the path in your third-party products in advance.
  You should only consider this complex option if continuous availability must be guaranteed.

Dedicated Synchronized Folder

The path to the dedicated synchronized folder does not change with the cloud update. If you are already using a dedicated synchronized folder, no manual steps are required.

5.3 Access via WebDAV (Network Drive)

When accessing via WebDAV, you automatically receive the new home structure. WebDAV is used, for example, when you mount the Fabasoft Cloud as a network drive.

If stable file paths are required for your application, the following migration options are available:

- After the update, you can store the new path in your third-party applications accordingly. If necessary, deactivate the third-party applications during the cloud update.

- After the update, you can store the required structure on "Home" again (see chapter 5.6 "Storing Objects Directly on Home"). If necessary, deactivate the third-party applications during the cloud update.

- Before the update, you can adjust the WebDAV URL in your third-party applications at a suitable time as follows (example for "Austria" location):
  `https://at.cloud.fabasoft.com/folio/webdav/[cooroot]` (URL encoded: `%5Bcooroot%5D`)
  This gives you access to your "Home" before the update and access to the "Personal Folder" widget after the update, which essentially corresponds to the previous "Home" (see chapter 5.1 "General Information").

- Before the update, you can set up a dedicated synchronized folder at a suitable time and store the required data in it (see chapter 5.7 "Setting Up a Dedicated Synchronized Folders"). The path to the dedicated synchronized folder does not change with the cloud update and is also available when accessing via WebDAV.

You should only consider this complex option if continuous availability must be guaranteed. If you also use the synchronization functionality, it is also affected by the change.

5.4 Access via CMIS

When accessing via CMIS, you automatically receive the new home structure.

If stable file paths are required for your application, the following options are available:

- After the update, you can store the new path in your third-party applications accordingly. If necessary, deactivate the third-party applications during the cloud update.

- After the update, you can store the required structure on "Home" again (see chapter 5.6 "Storing Objects Directly on Home"). If necessary, deactivate the third-party applications during the cloud update.

5.5 Access via the Fabasoft Cloud App for Android

When you start the app, you will be informed that the local files need to be updated.

If you need the local data but no new synchronization is possible at the moment (e.g. due to insufficient bandwidth), you can switch to offline mode. As soon as you leave the offline mode, the synchronization is performed.

5.6 Storing Objects Directly on Home

In addition to the widgets, you can store objects directly on "Home" and thus restore the previous paths.

To store an object directly on Home, proceed as follows:

1. Locate the desired object.
    You will find your current storage structure in the "Private Folder" or "Organization Folder" widget.

2. In the context menu of the object, click "Copy".

3. Navigate to "Home".

4. Open the context menu at an empty place in the home area and click "Paste Shortcut".

Note:

- Alternatively, you can use the `Ctrl + C` and `Ctrl + V` shortcuts.

- You can also drag and drop the object onto the "Home" entry in the tree view.

- You can also use the "Integrate in My Folder Hierarchy" action of Teamrooms shared with you to store the desired Teamrooms directly on "Home".

5.7 Setting Up a Dedicated Synchronized Folders

The file path to a dedicated synchronized folder is identical before and after the update. This allows you to make the adjustments before the update, but the effort is only justified if continuous availability must be guaranteed.

Note: When switching to a dedicated synchronized folder, all locally synchronized files are deleted. Make sure that there are no local changes that have not yet been synchronized.

To enable the dedicated synchronized folder, proceed as follows:

1. Click the account menu (your user name) and then "Advanced Settings" > "Synchronization".

2. Click the "Enable Synchronized Folder" button.

3. Click the "Enable" button. All previously synchronized data will be removed from your desktop workstations.

4. Click "Close".

The dedicated synchronized folder is automatically placed directly on "Home".

Note: Disabling the dedicated synchronized folder works in the same way ("Disable Synchronized Folder" button).