

contentACCESS Sharing Manual



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Introduction

contentACCESS Sharing is an Office Add-in for Outlook and OWA, which helps with large resource sharing between users.

The app can be activated in **Compose form** when the user creates a new message or appointment item. In the Compose form, if the client supports add-in commands, a custom button appears on the ribbon. If the button is not there, the user has to allow the add-in manually in File -> Info -> Manage Add-ins.

The add-in can be activated also in a **Read form**, when the Reading preview is displayed, by clicking on **View shared files** in the upper right corner. The add-in is able to recognize a normal "HTML link" and also link represented as text (we are not able to inject HTML into item's body on mobile and tablets).

Note: In case of using Exchange 2013, if you wish to install **Share app** from the **Office store**, the latest **CU (Cumulative update) version** has to be installed.

Important: If customers want to use contentACCESS Sharing or Mail app, contentACCESSLogin must be configured over SSL.

Compose form activation

In **Compose form**, the add-in is activated as a new custom task pane on the right side of the inspector window.



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| Send Send To Subject Monika Nevická Vtecharro Addres Ka Email m | zanká 19; 82106 Bratislava vakis, EU onka nevicka@tech-arrow.com wieda-arrow.com | | | Sharing Share content is as easy as it can be Account Don't have a contentACCESS account? Get a demo, purchase or learn more about our services here. Check our 'Getting started' video here. Share You can easily upload and share files to single, secure and well- structured store. Send only links You don't need to send large files as attachments in your email. Simple share the file and send the link pointing to the file. Access links Recipients can easily access shared files. Just simple click on a link for download. Manage expiration You can set expiration date and download count limit to the shared files. Cet started |
| Monika Nevická Na vyt | lacenie | | A ^ | ContentACCESS Document Share |

Figure 1. contentACCESS Sharing add-in activation in compose form

Read form activation

In Read form, the add-in is activated as a new custom task pane on the right side of the Outlook

window.

| | D / RECEIVE FOLDER VIEW DEVE | Doručená pošta - monika.nevicka@tech-arrow.com - Outlook LOPER | · 10 | 6 1 2 9 2 0 0 5 2 0 7 4 |
|---|---|--|----------------------------------|--|
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| b archive1 Auditing1 Auditing2 Deleted Items Emails to archive Koncepty [2] Odoslanå pošta Odstrånené pol 1 Archiv CA Calendar (2) | Adomatic re Gyr, Lam Yesterday PE: Na prelo New content New New | ID Date and Time Committer Check-in comment #10433 2018/07/04 10:31 Bugfix: generic tool 2 throws error on MinDe Bugfix: shortout migration workflow is a 1 #10478 2018/07/03 18:00 Bugfix: EMC SourceOne journal processing i handling Bugfix: d.velop target sets inva #10477 2018/07/03 15:13 Bugfix: setup version is not found New: Gen Source connector was added - needs work #10458 2018/07/02 08:42 New: EMC SourceOne connector can now tre archive as one journal mailbox | incorrect folder eric Journal | You can easily upload and share files to single, secure and |
| contentWEB D Conversation History EdgeWave ThreatT D Inbox MAM NevyZiadaná p [1] Pošta na odoslanie RSS Feeds Sent Items | RE: Interestin Tue 2:35 PM Hi, RE: Interestin Tue 1:2:56 PM Hi, Very good RE: Na preloc Tue 11:20 AM Super. Tub. | ID Type Title Date and Time Committer Created by Best regards, Click a photo to see recent emails and social updates. | Ē | Manage expiration You can set expiration date and download count limit to the shared files. Get started ContentACCESS Document Share |
| Mail Calence | dar People Tasks … | | P TO DATE. CONNECTE | TED TO: MICROSOFT EXCHANGE |

Figure 2. contentACCESS Sharing add-in activation in Read form



contentACCESS Document Share add-in functionality

The add-in's main purpose is to ease the sending of large resources via email communication. The large file is not assigned as attachment to the email, but is instead uploaded to contentACCESS server and HTML link pointing to the file is generated. Only the link is then injected into the email's body. The user can define the expiration date and the maximum count of allowed downloads (download limit, can be unlimited).

Compose mode activation and usage

- 1. Create a new mail item
- 2. Choose **Upload to contentACCESS** (from ribbon or from the list of add-ins, depends on the client application)
- 3. If Office loads the add-in UI and it is the first run, the user should see the Get started page. After clicking on the Get started button, the connection page opens. Here the user can define server name (only the host name!), where contentACCESS is running. It is enough to type the host name, no need to type the protocol. If you don't know the exact contentACCESS server host name, you can use the Discover functionality, which will check available contentACCESS servers for you. Logs can be viewed by clicking on the Show logs button.

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| Send | То | monika.nevicka@gmail.com; | | Se | erver name | |
| Jena | Cc | | | | contentACCESS host name | Discover |
| | Subject | Sharing add-in | | | | Test connection |
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| | a Nevická | | | Lo | lgs | Show logs |
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| Email Web Follow u | | onika nevicka@tech-arrow.com ww.tech-arrow.com | | | | |
| Followu | 8 | | | | | |
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| 🛆 Monika | Nevická Na v | tlacenie | 2 | ~ 7 | ContentACCESS Document Share | 8 |

Figure 3. Connection page on first run



4. If a server was successfully discovered, you should see the following message, where the name of the discovered server will be written. If discovery didn't find any server, you can still set the contentACCESS server name manually.

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| Clipboard 12 Basic Text 12 Names contentACCESS | Include Tags 75 Zoom officeGATE contentACCESS Share contentACCESS My Templates | |
| From - monika.nevicka@tech-arrow.com | Sharing × | |
| To To | Server name | |
| Send Cc | contentACCESS host name Discover | |
| Subject Sharing add-in | | |
| | Test connection | |
| | | |
| Monika Nevická | Logs Show logs | |
| V techarrow | | |
| Address Kazanská 19; 82106 Bratislava Slovakia, EU | Save Cancel | |
| Emaal monika nevicka@tech-arrow.com Web www.tech-arrow.com Followus Filewus | | |
| Followus Film D S C | | |
| | | |
| | | |
| | | |
| | | |
| | Discovery succeed | |
| | Found available contentACCESS host: | |
| | 'access.mycompanyarchive.com:443' . Would you like to use it? | |
| | | |
| | | |
| C Monika Nevická Na vyťlacenie | Yes No, thanks | |

Figure 4. Message after successful discovery

5. After connecting to contentACCESS server, you will need to authenticate yourself.



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| From To | monika.nevicka@tech-arrow.com monika.nevicka@gmail.com; | Sharing contentACCESS | ► × Document Share |
| Monika Nevick Vectorial Adress Email Web Followus | | Please provide you Lo | r login information. gin |
| | | | |

Figure 5. Login button

6. After clicking on the Login button, a pop-up with configured login providers will open. Choose one provider and log in.

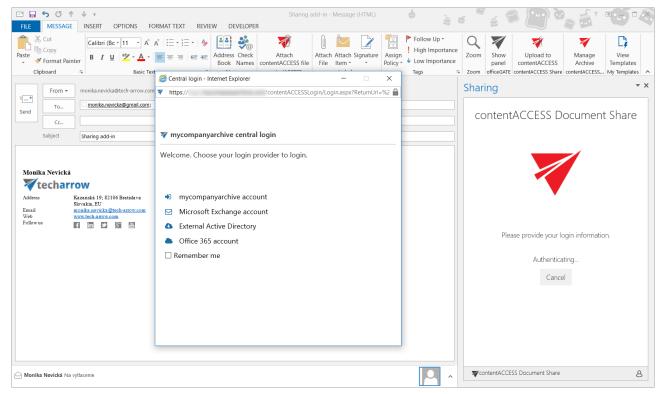


Figure 6. Login providers pop-up



7. After entering the credentials for selected login provider and successfully logging in, the user should see the upload page. He can drag and drop files - those will be uploaded, or click on the upload area, which will open a dialog where the user can select file(s) to be uploaded.

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| | |
| Subject Sharing add-in | |
| Monika Nevická Vicka razvika Uje Stato Bastalava Bava Bastala Bavika Bastalava Bastal | |
| C Monika Nevická Na vytlacenie | 8 |

Figure 7. Upload page

8. Before the upload is completed, a dialog, where expiration date and download limit for the shared item has to be set, opens. If the user checks the **Use always** checkbox, the app will use the values defined here for every sharing (the values can be changed from menu).



| | Sharing add-in - Message (HTML) | 6 26 | | |
|--|---|-----------|---|-----------|
| FILE MESSAGE INSERT OPTIONS FORMAT TEXT REVIEW DEVELOPER | Attach ntentACCESS file contentACCESS file File Item************************************ | gn Z | Coom Show Upload to contentACCESS Archive | Templates |
| | | Tags 79 Z | | |
| Monika Nevická Na vytlacenie | | <u> </u> | Cancel | |

Figure 8. Setting limits for shared item

9. After clicking on the Upload button (if the Use always checkbox was checked, step 8 will be skipped), the secure sharing page opens. On this page it is possible to see what item(s) will be shared and select who should be able to download the shared item(s) – if Recipients only (only recipients of the email) or Anybody (for example if the email is forwarded to other people). If the link should be accessible only for the recipients of the email, the user needs to click on the Finish sharing button before sending the email.



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| From - monika.nevicka@tech-arrow.com | Sharing • × |
| Image: Send To Image: monika.newicka@gmail.com; Ccc Image: Ccc Image: Ccc | A Don't forget to click on the 'Finish sharing' button at the bottom before sending the email! |
| Subject Sharing add-in | |
| a-1024x768.jpg cloud.mail .jpg contentACCESS.Email .Archive.be .safe .1-1.jpg (Shared files will be available until 2018-07-05 23:59:59 and can be downloaded 1 time(s)) Monika Nevická | Drop or Click to share |
| Adress Kazanici 19; 22106 Bratialava Slovalia, EU Email monita anvoka @techarrow.com Web nyw techarrow.com Follow us F m D S = | You will share 3 files a-1024x768.jpg cloud.mailjpg contentACCESS.Email_Archive.be_safe_1-1.jpg |
| | with recipients only with anybody |
| | 1 recipient monika.nevicka@gmail.com |
| | Finish sharing |
| C Monika Nevická Na vytlacenie | Transformation CCESS Document Share |

Figure 9. Selecting recipients for secure sharing

10. After the item has been successfully uploaded and recipients were set, the link will be injected into the body of the email. There is a known issue that on mobile devices it is not possible to inject HTML into body. The link (HTML formatted) is displayed as text in the body.

| E B 5 Ø ↑ FILE MESSAGE | ↓ = INSERT OPTIONS FORMATTEXT REVIEW DEVELOPER | Sharing add-in - Message (HTML) | 6 26 | " <u>-</u> • • • • | |
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| Monika Nevická Na vyl | lacenie | | | ▼contentACCESS Docur | nent Share & |





Figure 10. Successful upload

In the **Compose mode** we can configure advanced settings such as **Expiration** and **Download count limit** for the uploaded item(s). To open the **Configuration page**, click on the icon in the lower right corner - it will open the drop-down menu. Select **Settings**.

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| From • monika.nevicka@tech-arrow.com * To imonika.nevicka@gmail.com; Send * ************************************ | | | Sharing | | * X |
| Subject Sharing add-in | | | | | |
| a-1024x768.jpg cloud.mail_ipg contentACCESS.Email_Archive.besafe1-1.jpg hand-holding.a-dog.jpg | | | | | |
| (Shared files will be available until 2018-07-05 23:59:59 and can be downloaded 1 time(s)) Monika Nevická Vtecharrow | | | | $\bigcirc \uparrow \bigcirc$ | |
| Address Kazanitá 19. \$2106 Bertiála va Sovaká, EU Em al monika nerokkáljitech arow.com Web www.tech.arow.com Folor va fator se | | | Drop | or Click to share | |
| | | | | Logged in us monika.nev | |
| | | | | Settings Language | |
| | | | | | |

Figure 11. Opening the configuration page

It is possible to check/uncheck the **Use default settings** option here – if checked, then before uploading the dialog asking for limits won't appear, but the limits will be taken automatically from the settings. Any change has to be saved by clicking on the **Save** button. To check if the connection with the server can be established, click on the **Test connection** button.



| E D SAGE | ↓ = INSERT OPTIONS FORMAT TEXT REV | EW DEVELOPER | Sharing add | in - Message (HTML) | 6 | 1 6 | | | 2 3 ? | |
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| Send To | monika.nevicka@gmail.com; | | | | | | Server name | e companyarchive.c | om:443 | |
| Subject | Sharing add-in | | | | | | , | 1.2 | | connection |
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| Email n | Kazanská 19; 82106 Bratislava Slovakia, EU nonika nevicka @tech-arrow.com www.tech-arrow.com | | | | | | | ult settings and do | not ask beto | <u> </u> |
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Figure 12. Configuration page

Currently logged in user is displayed on the top of the drop-down menu. The user can also logout from the app by clicking on **Sign out** in the menu. The connection to the contentACCESS server will be broken, and the user has to configure the connection once again.

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| a-1024x768.jpg cloud.mail _jpg contentACCESS.fmail .Archive.be _safe _1-1.jpg hand-holding-a-dog.jpg (shared files will be available until 2018-07-05 23:59:59 and can be downloaded 1 tim Monika Nevická with the second se | ne(s)) | | Expiration days 1 Download count limit 1 Use default settings | and do not ask before sharing |
| Email monika.servika@row.com Web www.techanrow.com Follow us F T I I I II III | | | Logs | Show logs |
| Monika Nevická Na vytlacenie | | | ContentACCESS Docume | C Language |



Figure 13. Configuration page and the drop-down menu

The add-in also supports localization. Currently we are supporting Arabic, English, German, Norwegian, Chinese (simplified), Portuguese and Slovak language. The user can change application's language on the **Language settings** page. The change needs to be saved by clicking on the **Save** button.

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| | | | | | ✗ Settings |
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| | | | | | 😃 Sign out |
| Monika Nevická Na vy | lacenie | | A ^ | ContentACCESS Document Sha | are 8 |

Figure 14. Language settings page in the drop-down menu

Read mode activation and usage

The add-in activation in **Read mode** is basically the same as in **Compose mode**. The activation is explained in the section above. After successfully logging in, you should see the list of links extracted from the body with additional information about expiration date and download count/limit state. The list also contains valid links – the user can click on the name and it will be downloaded. Downloading may work differently on different platforms. The pop-up window appears when the user opens or downloads the shared item from the link, both in desktop Outlook and in OWA (browser version).



| Reply Reply All Genward Soft IM Wed 7/4/2018 2:06 PM Monika Nevická Sharing test To Monika Nevická | ^ | Sharing The files can be de Shared files | ownloaded by anybody | × |
|---|---------------|--|---|---|
| contentACCESS contentACCESS.Email .Archive.be .safe .1-1.jpg Microsoft-OneDrive-logo-official-1-696x385.jpg microsofts-latest-pitch-to-business-make-windows-azure-your-datacenter.png | Get more apps | contentACCESS.Er Expiration: Downloads: | nail_Archive.be_safe 7/31/2018 2/3 Show downloads | |
| ms-office.jpg (Shared files will be available until 2018-07-31 23:59:59 and can be downloaded 3 time(s)) Monika Nevická Vietcharrow Address Address Kazanská 19, 82106 Bratislava Slovakia, EU Email Monika arevická @lech-arrow.com | | Microsoft-OneDriv Expiration: Downloads: | ve-loqo-official-1-696x 7/31/2018 2/3 Show downloads | |
| Web www.tech.arrow.com Follow us 🖬 🖬 🖾 🖼 | | microsofts-latest-; Expiration: Downloads: | bitch-to-business-mak 7/31/2018 0/3 Show downloads | ~ |
| C Monika Nevická Sharing testing | ^ | ₩ contentACCESS Docum | ient Share E | 8 |

Figure 15. List of extracted links from body

If the user clicks on the shared link in the body or in the add-in's list, a pop-up window asking the user if he wants to open or save the item will appear.



| 😻 View | Downloads - Internet Explorer | | | | _ | | × |
|-------------------------------|--|---------------------------------------|------------------|---------|---------|------|----|
| View and track your downloads | | | Search downloads | | | | P |
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| | | | | | | | |
| Options | | | | Clea | ır list | Clo | se |



It is possible to open the drop-down menu also from the Read form's lower right corner.

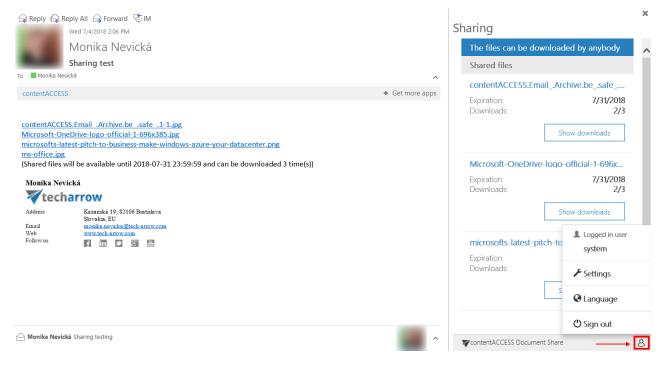




Figure 17. Opening the drop-down menu in Read form

The user can set the language of the add-in also in Read form.

| Reply Reply All G Forward 5 IM Wed 7/4/2018 2:06 PM Monika Nevická To Monika Nevická | ^ | Sharing Choose language English | × |
|---|-----------------|---------------------------------------|--------------------------|
| contentACCESS | + Get more apps | | Gave Cancel |
| Microsoft-OneDrive-logo-official-1-696x385.jpg microsofts-latest-pitch-to-business-make-windows-azure-your-datacenter.png ms-office.jpg (Shared files will be available until 2018-07-31 23:59:59 and can be downloaded 3 time(s)) Monika Nevická Extension Control (State State Sta | | | |
| Em aŭ monika avticka @tech-arrow.com Web www.tech-arrow.com Follow us fin D S 👼 | | | Logged in user system |
| | | | Language U Sign out |
| C Monika Nevická Sharing testing | · . | ₩ contentACCESS Document Share | - |

Figure 18. Language settings in Read form

The Sign-out menu option is used for signing out the currently logged-in user. The connection to the contentACCESS server will be broken and the user will have to configure the connection once again.

Changing the settings of your sharing

Note: This works the same way for both compose mode and read mode.

If you forgot to add someone to the sharing recipient list, the sharing has expired, you want to switch between public and private sharing etc., it is possible to change the sharing options directly in the app. First, click on **Edit sharing settings**.



| Sh | naring | | | × | | | |
|----|---------------------------------|-------|------------------------------------|---|--|--|--|
| | Recipient(s) | | Resend invitations | | | | |
| | @tech-arrow.com @tech-arrow.com | | | | | | |
| | Shared files | | | | | | |
| | CloudGate365 diagra | m v1. | ong | | | | |
| | Expiration: Downloads: | | 23. 7. 2020 0 (1 per recipient) | | | | |
| | | | Show downloads | | | | |
| | Edit shar | | ings | | | | |
| (| contentACCESS Document | Share | | 9 | | | |

Now you can edit the settings of your sharing:

Sharing status

With this function, the owner (the user who shared the file) can stop the sharing of his file and disable downloading of the shared data by anyone else. He can also re-enable the sharing later. If a sharing is public and it expires or is **suspended**, even the owner won't be able to download the shared files.

Sharing audience

techarrow

If you accidentally shared a file with everyone instead of just recipients, or if you want to make a file accessible for more than just the recipients, you can easily change the sharing audience with these buttons.

Recipients

If you wish to remove a recipient, click on the "X" next to his email address. If you wish to add a recipient, write his email address to the field and press Enter.

Expiration date

Simply pick a new expiration date from the calendar.

Download count/limit

Set the maximum amount of allowed downloads for the shared files.

Use always

If you want to use these settings as default (you won't need to fill them again during your next sharing), check the **Use always** checkbox.



| Sharing | | × | | | | | |
|--|---|---|--|--|--|--|--|
| Edit settings of your sl Sharing status | Edit settings of your sharing Sharing status | | | | | | |
| Active | Suspended | | | | | | |
| Sharing audience | | | | | | | |
| recipients only | anybody | | | | | | |
| Recipient(s) | | | | | | | |
| @tech | -arrow.com × | | | | | | |
| @tech-arr Add new recipient | <pre>@tech-arrow.com ×</pre> Add new recipient | | | | | | |
| Expiration date | Expiration date | | | | | | |
| 2020-07-23 | 2020-07-23 | | | | | | |
| Download count / limit | Download count / limit | | | | | | |
| 1 | | | | | | | |
| Use always | | | | | | | |
| Update | | | | | | | |
| Cancel | | | | | | | |

After the desired changes have been made, click on Update.

If a recipient doesn't have a **contentACCESS account** on the server the **Sharing app** is connected to, it will automatically also send an invitation to create one. If recipients haven't accepted the invitation or haven't received one yet, it is possible to re-send the invitation to **all recipients (1)** or only to **selected recipients (2)**.



| Sh | naring | | | × | | |
|----------------------------|-----------------------------|----------|------------------------------------|---|--|--|
| | Recipient(s) | 1 | Resend invitations | | | |
| | @tech-a @tech-arrc | | n 💌 | 2 | | |
| | Shared files | | | | | |
| | CloudGate365 diagra | ım v1.pı | ng | | | |
| | Expiration: Downloads: | | 31. 7. 2020 0 (1 per recipient) | | | |
| | | Sh | iow downloads | | | |
| | | | | | | |
| O Edit sharing settings | | | | | | |
| (| ontentACCESS Document Share | | | | | |