

officeGATE Manual – version 3.2



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Introduction to officeGATE

officeGATE is an MS Outlook add-in connecting your email client with your local file-system and with your SharePoint Online, OneDrive, Dropbox, Saperion, Saperion Workplace, Datengut Bauakte, contentACCESS, and many other providers.

When we work with emails and attachments we often use multiple applications. The collaboration between these applications is complicated and time consuming. What would be the right solution for this problem? If you choose officeGATE you do not need to switch to other applications. Directly from your Outlook you can have an easy access to your folders and documents. Simply drag&drop your attachments from/to the email into SharePoint or your local folders, and work with your files comfortably without any time-consuming navigations in your local or cloud file system. Just one simple move with your mouse and you have it! OfficeGATE is the easiest way how to handle with your emails and attachments. Start to enjoy its benefits, save your valuable time and thus your money – even for free!

Key features

- ✓ Built-in providers. officeGATE establishes a direct connection between your email client and common providers (SharePoint, MS OneDrive, MS OneDrive Business, Dropbox, Saperion Workplace etc.).
- Drag&Drop. Copy files with a simple move of mouse from/to the email message into SharePoint or other local providers.
- ✓ Edit. You can open, remove and edit files/folders directly from your Outlook.
- ✓ **Send files** as an attachment **directly** from officeGATE panel.
- ✓ Copy files between providers directly form the list view.
- Choose to attach a file itself, a link to the file, or send multiple files as a ZIP. When you right-click on the file in the pane you can decide how to attach it.
- Have access to the desired information even without internet connectionSearch in title and contents of your documents.
- ✓ **Customize your access with Favorites**. Define your own favorite folders or SharePoint sites.
- ✓ Share big files directly from your MS Outlook mailbox.
- ✓ Connect to multiple SharePoint sites.



- ✓ Directly from Outlook you can use SharePoint's content type selection and metadata fill features.
- ✓ **USE IT FOR FREE** or pay for the Premium version.
- ✓ Premium version features: Connection to multiple SharePoint sites, Automatic upload, Rules Definition.

Software requirements

- Microsoft .NET Framework 4.5.2 https://www.microsoft.com/en-us/download/details.aspx?id=42643
- Microsoft Office 2010,2013,2016
- Microsoft Windows 10, Microsoft Windows 8.1, Microsoft Windows 8, Microsoft Windows 7
- Microsoft SharePoint Server 2013 Client Components SDK, version 15.4711.1001 https://www.microsoft.com/en-us/download/details.aspx?id=35585
- Visual Studio 2010 Tools for Office Runtime* <u>https://www.microsoft.com/en-us/download/details.aspx?id=48217</u>

* This prerequisite is required for Group Policy installation only.

Getting started

The application can be installed with 2 kinds of setup files: either with EXE or MSI:

officeGATE_x[platform].exe - are used for single installations and include prerequisites installations.

officeGATE_x[platform].msi - are used for GPO-silent installations. Prerequisites are not installed automatically by this type of setup. The setup aborts, if one of the prerequisites are not met.

Single installation of officeGATE

- 1. Download the setup package (.exe).
- 2. Select the language for installation from the available languages:

	your vision of technological evolution		
techarrow			
officeG	ATE - InstallShield Wizard X		
V	Select the language for the installation from the choices below.		
	English (United States)		
	OK Cancel		

Hint: By The Group Policy installation only the English language is supported. For detailed information about GPO installation refer to chapter <u>Installation of officeGATE in a distributed company environment using Group Policy</u> of this guide.

3. Run the setup package and follow the on-screen instructions.



4. The officeGATE InstallShield Wizard will appear as shown on the screen below. Click Next.





5. In the next step click on I accept the terms in the license agreement radio button and click Next.





6. Choose the destination folder where officeGATE will be installed on your PC and click **Next**.

뤻 officeG/	ATE - InstallShield Wizard			×
Destination	on Folder xt, or click Change to install to a d	ifferent folder.	7	officeGATE
	Install officeGATE to: C:\Program Files\TECH-ARROW	/\officeGATE\		Change
InstallShield		< Back	Next >	Cancel

7. Click **Install** and then **Finish** to complete the installation process.



-				
👘 officeGATE - InstallShield Wi	zard			×
Ready to Install the Program				C CATE
The wizard is ready to begin ins	tallation.			officeGAIE
Click Install to begin the installat	tion.			
If you want to review or change	any of yo	our installation sett	ings, click Back. Cli	ick Cancel to exit
the wizard.				
InstallShield				
		< Back	Install	Cancel
		- Buck	Inotan	
FiceGATE - InstallShield Wi	zard			×
	Insta	IIShield Wiza	ard Complete	d
	The Ins	tallShield Wizard h	as successfully inst	talled officeGATE.
	Click Fir	hish to exit the wize	ard.	

Show the Windows Installer log

Finish

Cancel

< Back



The last window of the installation process will offer for the user to open the Windows Installer log. Wish you check it, mark the "Show the Windows Installer log" checkbox. In case that you would not like to open it leave this checkbox empty.

When installation is complete, open officeGATE in MS Outlook. If MS Outlook was originally opened a restart of MS Office after installation is needed.

Installation of officeGATE in a distributed company environment using Group Policy

officeGATE supports Group Policy installation. Group Policy is used to automatically distribute officeGATE setups to the domain users. MSI setups are automatically installed on the user's computer when signing in, while EXE files are only distributed and the user may decide, if he installs officeGATE or not. This can save enormous time and energy, as the application can be easily installed at-one-go. For more information about Group Policy installations refer to <u>this</u> guide.

Multi-language support is not included in case of GPO-installation. The language of the application will be selected as follows:

- At first the **language of the already installed officeGATE** will be checked. If found, it will be applied.
- If the language setting was not found (i.e officeGATE is installed for the first time), then the Registry will be checked. If the language was found, it will be applied.
- If the language setting was not found in the Registry, officeGATE will use the language that is set in the MS Outlook of the user.

Note: System admin rights are required to install officeGATE using Group Policy.

If you want to pre-configure more providers than just contentACCESS, you can do it via **officeGATE configuration files**. officeGATE configuration files are located in <u>%AppData%\officeGATE</u> directory. There is one global configuration file containing settings for officeGATE and separate files for each provider.



The list of configuration files is the following:

File name	Description
Settings.xml	Global configuration file for officeGATE. Most of the values can be configured using the global settings dialog.
OGcontentACCESSSettings.xml	Configuration file for contentACCESS provider. Can be configured using the provider configuration dialog.
SharePointCOMSettings.xml	Configuration file for SharePoint provider. Can be configured using the provider configuration dialog.
OneDriveSettings.xml	Configuration file for OneDrive provider. Can be configured using the provider configuration dialog.
EIMConfig.json	Contains configuration settings for EIM connection.

The global configuration file (Settings.xml)

Configuration key	Value	Description
PanelShown	True/false	Specifies whether to show officeGATE panel on Outlook startup.
CtrlToUse	True/false	By default drag and drop to Outlook copies the link to the document. Holding the CTRL key copies the document itself. Setting



		"true" makes the function to work the opposite way.
ShowTooltips	True/false	Specifies whether to show tooltips in tree view.
ShowInMailCompose	True/false	Specifies whether to show officeGATE panel in mail compose window.
HiddenProviders	List of tags	Identifiers of providers that should not be shown in officeGATE.
SelectedLanguage	One of these values: en, de, no, Two-letter code of the zh-Hans, pt, sk, ar, cs, pl, hu, el interface language.	
SwitchToGridViewWithMiddleMo useClick	True/false	Specifies whether to enable switching between tree and grid view with middle mouse click.
CloseFoldersAutomaticallyInTree View	True/false	Specifies whether to close previously opened folders when opening a new folder in the tree view.
EnableOfflineAccess	True/false	Specifies whether the offline synchronization is enabled.
OfflineDatabaseSizeLimited	True/false	Specifies whether the size of the offline database should be limited.



OfflineDatabaseMaxSize	True/false	Specifies the maximum size of the offline database in megabytes.
OfflineSyncFilterItemByAge	True/false	Specifies whether to filter the offline synchronized items by age.
OfflineSyncItemMaxAge	<value> and <unit> tags.</unit></value>	The maximum age of items that should be offline synchronized.
OfflineSyncItemMaxAge.Value	Integer	Thevalueforthe OfflineSyncItemMaxAgeconfiguration setting.
OfflineSyncItemMaxAge.Unit	One of these values: Day, Week, Month, Year	The time unit for the OfflineSyncItemMaxAge configuration setting.
DisablePanelToggling	True/false	Specifies whether to hide the "Show panel" button on Outlook ribbon.
OfflineSyncThreadCount	Integer	Specifies the number of offlinesynchronizationthreads(recommended 2, maximum is 8).
OfflineSyncThreadPriority	One of these values: Lowest,Specifies the priority of theBelowNormal,Normal,AboveNormal, HighestRecommended value is "Lowest"	
OfflineAutoSyncEnabled	True/false Specifies whether the a offline synchronization is	



OfflineAutoSyncInterval	According to <u>https://www.w3.org/TR/x</u> <u>mlschema-2/#adding-</u> <u>durations-to-dateTimes</u>	Specifies the interval of the automatic synchronization.
OfflineSyncThrottling	Integer	Specifies the length of artificial idle states during the offline synchronization, in milliseconds. Set this value if the offline synchronization causes high CPU utilization.
MinimumFreeSpaceShouldLeft	Integer	Specifies the minimum free space that should left on the drive which contains the offline database, in megabytes. This value helps to avoid filling the disk with the offline database.
PageSize	Integer	Specifies the number of items to be loaded at a time by the list view.
ShowItemCount	True/false	Specifies whether to show the total item count under the list view.

The contentACCESS provider configuration file (OGcontentACCESSSettings.xml)

Configuration key Value	Descript	ion
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ServerName	String	Specifies the contentACCESS server name.
GenerateURL	True/false	Specifies whether the server URL is automatically generated from server name (the result URL assumes the server is using https).
URL	String	Specifies the URL of the contentACCESS server.
ShowSharingButton	True/false	Specifies whether to show the sharing button on Outlook ribbon.
EnableEmailArchive	True/false	Specifies whether to show the email-archive relate buttons (Archive, Restore, and Search) on Outlook ribbon.
Token	String	Token of the user which is currently logged in to contentACCESS.
CurrentUser	True/false	If true, Windows authentication will be used (for contentACCESS 3.1 and older).
Login	String	The user name (for contentACCESS 3.1 and older).
Password	String	The user's password (for contentACCESS 3.1 and older).
AuthenticationConfigId	String	The authentication configuration identifier (for contentACCESS 3.1 and older).
AuthenticationType	String	The authentication type (for contentACCESS 3.1 and older).

The SharePoint provider configuration file (SharePointCOMSettings.xml)

Configuration key	Value	Description
SiteSettings	List of tags	List of configured SharePoint sites.



SiteSettings. SharepointSiteSettings	SharePoint site configuration values	Set of configuration values for a single site.
SharepointSiteSettings.Id	Guid	Unique identifier of the site.
SharepointSiteSettings.BaseURL	String	Specifies the site URL.
SharepointSiteSettings.UseIntegratedAuthentic ation	True/false	Specifies whether to use integrated authentication for this site.
SharepointSiteSettings.LogonWithGlobalUser	True/false	Specifies whether to use global user credentials for authentication when accessing this site.
SharepointSiteSettings.LogonWithSpecificUser	True/false	Specifies whether to use specific user credentials for authentication when accessing this site.
SharepointSiteSettings.Login	String	The user name for case if LogonWithSpecificUser = true.
SharepointSiteSettings.Password	String	The password (in encrypted form) for case if LogonWithSpecificUser = true.
SharepointSiteSettings.IsEnabled	True/false	Specifies whether to show the site under the SharePoint provider.



SharepointSiteSettings.WebId	Guid	The SharePoint web identifier – filled out automatically on first access to the site.
SharepointSiteSettings.WebTitle	String	The SharePoint web title – filled out automatically on first access to the site.
SharepointSiteSettings.WebUrl	String	The SharePoint web URL – filled out automatically on first access to the site.
GlobalUserCredentials	<login> and <pa ssword> tags</pa </login>	The global user credentials which can be used by multiple sites.
GlobalUserCredentials.Login	String	The name of the global user.
GlobalUserCredentials.Password	String	The password of the global user.
SharepointSiteSettings.IsEIMManaged	True/false	Specifies whether the site has been added and is managed by EIM.

The OneDrive provider configuration file (OneDriveSettings.xml)

Configuration key	Value	Description
Accounts	List of <account> tags</account>	List of configured OneDrive accounts.
Accounts. Account	SharePoint site configuration values.	OneDrive account specification.



Account.Type	Consumer/Business	Specifies the account type.
Account.UserId	Guid	The identifier of the user associated with this account.
Account.RefreshToken	String	The logon token.
Account.Enabled	True/false	Specifies whether the account is enabled.

XML distribution with GPO in distributed company environment

Prior to installing officeGATE with Group Policy installation (i.e. distributing officeGATE setups to domain users), GPO is generally used to distribute the officeGATE auto-configuration file (officeGATE_Configuration.xml) to the users. The GPO- installation of the officeGATE can be launched after the XMLs have been distributed to these users. This ensures, that officeGATE will be later installed with the global and connection settings that were initially set in the XML file.

For detailed instructions how to use GPO to distribute XML files refer to chapter "How to copy officeGate_Configuration.xml using Group Policy" of <u>this</u> guide.

XML file generated from contentACCESS:

The XML can be automatically generated from contentACCESS Central Administration. XML file generated from contentACCESS contains the specified global settings and also the connection settings between officeGATE and contentACCESS provider. Parameters included in the XML file are the following: the license key, the required login provider, language settings, contentACCESS FQDN-settings.

To create this officeGATE_Configuration.xml file from contentACCESS and distribute it before the installation follow these steps:



 In section System →Client applications → officeGATE of contentACCESS Central Administration specify the required parameters: license key, login provider, default language and click Generate configuration.



System > Client Applications > officeGATE

officeGATE is a Microsoft Outlook add-in connecting Microsoft Outlook with local file-systems and also contentACCESS, OneDrive, SharePoint, etc. The add-in enables the user to Drag&Drop not only archived files from/to email messages directly in Microsoft Outlook, without the need to switch to other applications.

Generate officeGATE configuration	1	
License key:		
Default login provider:	None	•
Default language:	Not specified	-
	Generate configuration	

2) Further distribute the XML files with the Group Policy based on the "How to copy officeGate_Configuration.xml using Group Policy" chapter of <u>this</u> guide.

3) Finally install officeGATE using Group Policy installation.

Launching officeGATE

To launch and display officeGATE, open MS Outlook and click on the **Show panel** / **Hide panel** ($\overline{\mathbf{v}}$) button. By clicking the button again you hide the officeGATE panel.





The officeGATE panel can also be accessed in a compose e-mail message window. To show it, click the officeGATE button (\checkmark) in any message.

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E I S C ↑ ↓ = FILE MESSAGE INSERT OPTIONS FORMATTEXT REVIEW DEVELOPER	Untitled - Message (HTML) 🛛 🧔	20 2	
$\begin{array}{ c c c c c c c c c c c c c c c c c c c$	Attach ontentACCESS file contentACCESS	Follow Up • High Importance Policy • Tags	e Zoom Apps for Office zoom Add-ins officeGATE contentACCESS Share
From • To Cc Subject			officeGATE ▼ × Tree view := List view Search ✓ ● Favorites ✓ © ontentACCESS ✓ ● ● My Computer ● OneDrive ● ● My SharePoint Sites ● ● My SharePoint Sites
			*

Note: In case you have troubles with displaying officeGATE check section Troubleshooting.

officeGATE pane's overview

The picture below shows for the user the officeGATE pane (red frame) with the available providers. A provider is a document management system connected with officeGATE (like OneDrive, SharePoint etc.) that is used to handle with the documents. The officeGATE pane consists of its header part and the pane with the available providers. The following option can be accessed from the header (purple numbers) part:

- View selectors (1. tree view , 2. list view, 4. collapse all) more details here;
- Search (3) more details here;
- officeGATE options dropdown list (5) Settings (more details here), Send feedback, About



The providers are listed alphabetically in the pane. We marked them with green on the screenshot below. Many of these providers are already expanded so their contents are also visible. Use the folders and the items context menu items to work with your folders/libraries/documents.



Connection settings

To be able to work with the files, the given system must be connected to officeGATE. To connect to the available providers (systems) the user has to:

- 1. Enable (enable = turn on) the desired provider(s) in the officeGATE settings (more information here);
- 2. Configure connection settings (for more information refer to this chapter);
- 3. Connect to the provider(s) by clicking on "Connect" in the context menu (some providers do not require this step).



Enabling/disabling providers

If a provider is enabled, it gets displayed in the officeGATE pane. A disabled provider is hidden. By default all available providers are enabled (i.e. visible) in the officeGATE pane. OneDrive and Dropbox folders can be accessed under "My computer" node as well if the client applications are installed locally.

The default connection setting can be changed in officeGATE settings as described below.

Enabling/disabling the officeGATE providers. In the officeGATE's pane click on the subtron and choose **Settings...** as shown on screenshot below. In the **officeGATE Settings** dialog switch to the **Providers** tab. All available providers (contentACCESS, Perceptive Workplace, My computer, OneDrive, SharePoint) are listed on this tab. Check/uncheck the desired provider's checkbox to show/hide it. Wish you connect to a system, click on the **Settings** button to configure required connection settings. These connection settings can be also accessed using the providers' context menu and will be described in more details in chapter <u>Connecting to providers</u>.



FILE HOME SEND) / RECEIVE FOLDER VIEW DEVE	@tech-arrow.com - Outlook	é <u>à</u> é	
New New Delet	P Delete Reply Reply Forward	tring Team Emails to archive G To Manager Team Email Open To Manager Team Email Open Rules OneNote Reply & Delete Create New Wove Rules OneNote Policy Read	e Follow UD- X Find Address Book Find Address Book Find Address Add-ins Add-ins	Share with ordinerACCESS officeGATE Email Archive Xext View Shared files Email Archive contentACCESS Share ∧
A Favorites A Favorites Doručená pošta Odošlaná pošta Koncepty Odstránené položky A Doručená pošta Koncepty Odoslaná pošta Dodstránené položky Archiv D CA contentWEB Conversition History	Search Current Mailbox (Ctrl+E) ○ All Unread Newest ↓ All Unread Newest ↓ Task 19922 30-Nov-17 Task 19922 30-Nov-17 Task 19922 30-Nov-17 Task 19923 30-Nov-17 Task 18915 29-Nov-17 Task 18914 29-Nov-17 Task 18914 29-Nov-17 New content 29-Nov-17 New content 29-Nov-17	Image: Section of the section of t	+ Get more apps ew version is already	OfficeGATE Tree view III List view Search Favorites Favorites W Computer My Computer My Computer Conterview My SharePoint Sites
Inbox Nevyžiadaná pošta Pošta na odoslanie RSS Feeds Sent Items Senet Folders	Task 13775 29-Nov-17 Task 13775 tech-arro New DragAn 29-Nov-17 New	- Windows au - Important b O Cor O Def Con Offi	i results	
▷ dne@ta.internal	tech-arro New content 29•Nov-17 New	о Use о Disg о Offi о K Сюзе		
▲ ▲ Inbox 5391 ANE	tech-arro Task 13859 29-Nov-17 Task 13859	o Sav O Out Off WinShortcutter for MAC	×	
SNE ▷ [Gmail] Cestovné	tech-arro Task 13886 28-Nov-17	3 See more about	• 77	
Mail Calenc	lar People Tasks …			*
ITEMS: 1,232		ALL FOLD	ERS ARE UP TO DATE. CONNECTED TO: MICROS	OFT EXCHANGE 🔲 🕸 + 100%

Note: You can hide the providers using the provider's context menu as well. Right click on the provider in the pane and select ¹⁰ Hide this provider from the context menu items.



Connecting to providers

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In the following section we will demonstrate how to configure the connection settings by each available officeGATE provider. As already mentioned above, a provider's connection settings can be reached a) either from the **Providers** tab of **officeGATE settings** dialog (1st screenshot below) or b) from the given provider's context menu (2nd screenshot below):



With clicking on "**Settings**" the provider's connection dialog opens. Each provider requires to specify different connection parameters, which will be described in the following subchapters of this guide.

Connecting to contentACCESS



officeGATE can be interconnected with contentACCESS, TECH-ARROW's great document management software. With officeGATE the user can access the contentACCESS documents directly from MS Outlook, without a need to switch to another application.

Important: The officeGATE version 2.9 and higher is compatible only with contentACCESS 3.1 and higher. Connecting to an older version results in an error message about version incompatibility.

To connect officeGATE with contentACCESS, click "Settings" in the context menu or in the officeGATE settings to open the contentACCESS connector settings dialog. Further specify the connection parameters:

- 1) If you use proxy (contentACCESSWS) with secure (HTTPS) connection to connect to contentACCESS, configure the connection as follows:
 - Check the Generate connection URL checkbox;

• Enter the contentACCESS server name into the **Server name** field; with this action the connection URL will be generated automatically;

- Specify a maximum item count that should be displayed in the list view (by default this is set to 50)
- Specify a maximum number of lookup items (by default the value is set to 20).
- Specify your default sharing settings (if the Sharing plugin is not licensed in your contentACCESS, you can ignore these settings; more information <u>here</u>)
- Save your settings.

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contentACCESS	connector settings				_	
Settings						
	Connection Server name:	tacatest.ta.intern	al			
		Generate con	nection URL			
	Connection URL:	https://tacatest.ta	a.internal/contentACCI	ESSWS/ModelService.s	VC	
	General					
	Items per page in list view Maximum number of look	v: kup items:	200			
	Sharing	nd don't ask before	new sharing			
	Expiration days:		1			
	Download count limit:		1	0 = no limit		
Login	Logout				Save	Cancel

2) If you use proxy (contentACCESSWS) with unsecure (HTTP) connection to connect to contentACCESS (i.e. you use proxy but do not have a valid certificate), configure the connection as follows:

- Enter the contentACCESS server name into the Server name field;
- Enter the HTTP connection URL with the correct server name into the **Connection URL** field: <u>http://[ServerName]/contentACCESSWS/ModelService.svc</u>

• Select an authentication type from the **Authentication type** dropdown list; if there were new authentication providers enabled in contentACCESS, but they do not appear in the list, click **Reload** to refresh the dropdown list;

• Enter your contentACCESS credentials (Login name and Password);



- Specify a maximum item count that should be displayed in the list view (by default this is set to 50)
- Specify a maximum number of lookup items (by default the value is set to 20).
- Specify your default sharing settings (if the Sharing plugin is not licensed in your contentACCESS, you can ignore these settings; more information <u>here</u>)
- Save your settings.

1	Constitution	
	Connection	
	Server name: tacate	t.ta.internal
	Ger	erate connection URL
	Connection URL: http://	acatest.ta.internal/contentACCESSWS/ModelService.svc
	General	
	Items per page in list view:	200
	Maximum number of lookup items	20
	Sharing	
	Use default settings and don't	ask before new sharing
	Expiration days:	1
	Download count limit:	1 0 = no limit
	Download count limit:	1 0 = no limit

- 3) If you use direct connection to connect to contentACCESS (no proxy is installed), configure the connection as follows:
 - Enter the contentACCESS server name into the **Server name** field;



• Enter the connection URL with the correct server name into the **Connection URL** field: http://[**ServerName**]:8736/contentACCESSWS/ModelService.svc

• Select an authentication type from the **Authentication type** dropdown list; if there were new authentication providers enabled in contentACCESS, but they do not appear in the list, click **Reload** to refresh the dropdown list;

- Enter your contentACCESS credentials (Login name and Password);
- Specify a maximum item count that should be displayed in the list view (by default this is set to 50)
- Specify a maximum number of lookup items (by default the value is set to 20).
- Specify your default sharing settings (if the Sharing plugin is not licensed in your contentACCESS, you can ignore these settings; more information <u>here</u>)
- Save your settings.



contentACCESS	connector settings				_		×
Settings							
	Connection						
	Server name:	tacatest.ta.interna	l				
•		Generate conn	ection URL				
	Connection URL:	http://tacatest.ta.i	nternal: <mark>8736</mark> /contentA	CCESSWS/ModelServ	rice.svc		
	General						
	Items per page in list view	r.	200				
	Maximum number of look	up items:	20	▲			
	Sharing						
	Use default settings ar	nd don't ask before r	new sharing				
	Expiration days:		1				
	Download count limit:		1	● 0 = no limit			
Login	Logout				Save	Cance	I

There are two possible ways to log in to contentACCESS:

1. After saving your settings, click on the **Login button**. A pop-up with **Login providers** will appear. When clicking on <u>Use another login method</u>, all **Login providers**, which are configured in Central administration, will appear.



Central login		×
▼ TECH-ARROW central login		
Welcome. Choose your login provider to login.		
Last time used:		
 contentACCI 	ESS account	
Username:		
Password:		
	Login	
□Remember me		
<u>Use another login</u>	n method	

Select the Login provider that you would like to use, enter your credentials and click on the blue Login button.



Central login		×
▼ TECH-ARROW central login		
Welcome. Choose your login provider to login.		
 ➡ contentA Username: Password: 	CCESS account system ••••••••••• Login	
👌 External A	Active Directory	
Windows as current user		
Windows as different user		
□Remember n	ne	

2. After saving your settings, close the contentACCESS connector settings window. Right-click on the **contentACCESS** provider in the officeGATE pane and select **Connect** from its context menu.



A pop-up with **Login providers** will appear. When clicking on <u>Use another login method</u>, all **Login providers**, which are configured in Central administration, will appear.



Central login		×
▼ TECH-ARROW central login		
Welcome. Choose your login provider to login.		
Last time used:		
 contentACCI 	ESS account	
Username:		
Password:		
	Login	
□Remember me		
<u>Use another login</u>	n method	

Select the Login provider that you would like to use, enter your credentials and click on the blue Login button.



Central login		×		
▼ TECH-ARROW central login				
Welcome. Choose your login provider to login.				
 contentACC Username: Password: 	ESS account system ••••••			
 External Ac Windows a Windows a Remember me 	tive Directory s current user s different user			

Important: The old login is supported if officeGATE tries to connect to contentACCESS 3.1.76 or less. So lastly released 3.1 with service pack 2 is working with new login. If contentACCESS version is less than 3.1.76, then the old login pop-up will appear when trying to connect to contentACCESS provider:



	officeGATE Login		×		
Authentication					
	Authentication type:	Forms ~	Reload		
	Logon name:	system			
	Password:	******			
		Login	Cancel		
T s	The Windows authentication type for the old login works only with "current user", other user cannot be selected.				

Once the connection is well established, the licensed plugins will be listed when extending the contentACCESS provider's node in the pane.



Note: With the Metalogix Archive Manager Exchange Edition archive connection you may access your old MAM shortcuts in officeGATE. The connection to this archive can be established using the respective plugin of contentACCESS.


First you have to install and configure Legacy MAM retrieve server on the MAM server, and configure it in the contentACCESS Central Administration. (For more information refer to the <u>contentACCESS Manual</u>).

contentACCESS provider also has a **Logout** button in settings. Acording to whether the user is logged in or not, the button is enabled or disabled.

contentACCESS	connector settings				_		\times
Settings							
	Connection						
	Server name:	tacatest.ta.interna	al				
		Generate conn	ection URL				
	Connection URL:	http://tacatest.ta.i	internal/contentACCESS	SWS/ModelService.sv	c		
	General						
	Items per page in list view	:	200				
	Maximum number of look	up items:	20	A V			
	Sharing						
	Use default settings an	id don't ask before r	new sharing				
	Expiration days:		1				
	Download count limit:		1	● 0 = no limit			
Login	Logout				Save	Cance	4

Connecting to third -party DMS providers (Datengut, Perceptive)

It is also possible to connect to third-party DMS (data management software) providers - such as Datengut, Perceptive (also known as Saperion ECM) - in officeGATE. Third party DMS providers are integrated as plugins



into the contentACCESS provider. To be able to connect to these providers, the respective third-party authentication provider must be enabled in contentACCESS. (For more information refer to section "Login providers" in the <u>contentACCESS Manual</u>). Single sign on authentication is supported as well. Single sign on means, that it is not required to create a Datengut or Perceptive user login in contentACCESS to connect to Perceptive or Datengut DMS in officeGATE. The user login will be created automatically in the background when logging into the Datengut/Perceptive DMS from officeGATE.

How to connect to the Datengut/Perceptive DMS in officeGATE: First, you need to configure and log in to the contentACCESS provider (read more in <u>this</u> section). When logging in:

- Select the Datengut/Perceptive Login method (provider).
- Type in your already existing Datengut/Perceptive user logins.
- Click on the blue Login button.

The Datengut/Perceptive model will be connected to your officeGATE. You can check it with unfolding the contentACCESS node in the officeGATE's pane:



Screenshot A: Perceptive node in tree view



Screenshot B: Datengut node in tree view

Connecting to SharePoint site(s)

The following SharePoint versions are supported by officeGATE:

- Office 365, SharePoint 2013, SharePoint 2010
- Foundation

Note: The SharePoint provider does not support login for external users. An external user is someone from outside your Office 365 subscription to whom you have given access to one or more sites, files or folders.

Open the SharePoint connector settings dialog with clicking on "Settings" in the \square SharePoint node's context menu (or in officeGATE settings dialog \rightarrow Providers tab).



officeGATE supports the connection to multiple SharePoint sites. The already connected sites are listed in the SharePoint connector settings dialog. This dialog is empty when connecting to a SharePoint site for the first time. To add a new site to the list, click on "Add new site" button.

SharePoint connection	ctor settings				- 🗆 X
Settings	Sites Url https:// .sharepoint.c	om		Loqin	Enabled
	Edit site	Delete site			Add new site
	Show the content type select	on dialog only if required fields	are present		
					Save Cancel



A new dialog (like on the picture below) will automatically open. In this dialog you need to specify the site that you want to connect to. Fill in the **Site** URL and enter **Login** with the corresponding **Password**. If the **Use integrated authentication** checkbox is checked, the user's current Windows identity will be sent to the SharePoint server and used for authentication and the **Login** and **Password** textboxes will be disabled. Further check the connection with clicking the **Test connection** button and then click Save.

SharePoint con	nector settings		_		×
Settings					
	Site:]
2 2		Use integrated authentication			
	Login:]
	Password:]
		✓ Enabled			
Test con	nection	Save	2	Cance	4

The **Show the content type selection dialog only if required fields are present** option (in the initial dialog) allows for the user to decide if the content type and metadata will be required:

a) By each upload, regardless if there are required fields present – in this case the option should be turned off

b) Only by uploading to containers requiring these properties – in this case the option should be turned on. The required data are filled into a show-up dialog when uploading to a SharePoint container. For more information read <u>this</u> chapter.

Important!!! If the connection to SharePoint cannot be established one of the reasons for it could be that the SharePoint password has been changed on the server. The solution in this case is to set the new password in officeGATE, too.



Editing SharePoint sites

SharePoint settings in officeGATE need to be changed in many cases (due to the change of the password, for example). To change these settings select the site that you need to edit and click on the "Edit site" button. The settings dialog of the corresponding site will be opened, where you can change the URL, user or password (Screenshot A).

	Sites	1. S	elect the	site.			
	Url				Login	Enabled	
	https:// .sharepoint.com	1 <u></u> *			manife constant from proce		
		SharePoint connec	tor settings				- 0
		Settings					
			Site:	https:// .sh	arepoint.com		
		S 🗲		Use integrated au	thentication		
2. Click t	o edit the connection.		Login:				
			Password:	*****			
	Edit site	-		Inabled	3. Edit the con	nection settings.	
	Show the content type selection						

Screenshot A: Editing SharePoint site's settings

The sites can be also disabled/enabled with checking/unchecking the "Enabled" checkbox in the corresponding row (Screenshot B). If a SharePoint site has been disabled, it will not be connected to officeGATE (it will be hidden in the pane, too).

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SharePoint conne	ctor settings				- 🗆 X
Settings					
S 🗲	Sites Url https:// .sharepoint.c	com		Login	Enabled
	Edit site	Delete site			Add new site
		ion dialog only if required fields	are present		
	Show the content type select	ion dalog only in required news	are present		
					Save Cancel

Screenshot B: Enabling/disabling SharePoint sites

SharePoint sites can be also deleted from the list. To delete a site select it in the list, then click on option "Delete site" in the dialog (Screenshot C). The connection with deleted sites can be newly established with clicking on the "Add new site" button, and specifying the required fields in the dialog.



Settings Sites I. Select the site. Url https:// sharepoint.com	
Sites 1. Select the site.	
S S Interpretation Sharepoint.com	
https:// .sharepoint.com	
2. Click to delete the site.	
Edit site Delete site V Add new site	
Show the content type selection dialog only if required fields are present	
Save Cancel	



Connecting to Perceptive Workplace

With Perceptive Workplace, you have a very straightforward and rapid way to share documents with coworkers, partners, and customers. The Perceptive Workplace documents can be handled directly from MS Outlook using officeGATE.

To connect with the file system open the **Perceptive Workplace connector settings** window from the node's context menu like on the screenshot below (or from **officeGATE settings** \rightarrow **Providers** tab).



In the pop-up window fill in the Site URL, enter Login and Password then click Save.

Perceptive Work	place connector	r settings –	-		×
Settings					
	Site:	https://pw-na.psft.co			
P vv	Login:				
	Password:	**********			
Test conn	ection	Save		Cance	el

After the connection has been established you can start to work with your folders and subfolders. Click on **Refresh** button in the context menu to refresh already updated folders/subfolders.



Connecting to Dropbox

Who uses Dropbox knows that all files, photos, videos that are saved in Dropbox will be automatically saved also to the computer. This also means that once you have Dropbox installed on your PC, it will appear between your providers in the officeGATE pane under the My Computer local file system, too. After you have successfully installed Dropbox (click <u>here</u> to download the installation file) it will be connected automatically to your officeGATE. Locate it with unfolding **My Computer** in the officeGATE's pane as shown on the screenshot below.



Connecting to OneDrive

OneDrive is Microsoft's service for hosting files in the "cloud" that's available for free to all the owners of a Microsoft account. OneDrive offers for the users a simple way to store, sync and share all kind of files with other people and devices on the web.

officeGATE is a brilliant tool that integrates OneDrive into your MS Outlook mailbox and ensures a simple and quick access to the documents stored in the OneDrive folders. The OneDrive provider (in the officeGATE pane) connects the user both to his personal and business account using 2 subnodes:

- Personal this node connects you with the online OneDrive system using your personal account (e.g. john.doe@gmail.com)
- Business this node connects you with the online OneDrive for business system using your company account (e.g. john.doe@tech-arrow.com)

If you have installed OneDrive on your computer, the files will be available locally under the My Computer node, too.



The user may decide to which of these OneDrive system(s) above he wishes to connect to. The connection to the OneDrive system(s) can be configured in the **OneDrive connector settings** dialog.

Click on "Settings" (either using the node's context menu or from officeGATE Settings \rightarrow Providers tab):



The following dialog pops up. Check the checkbox(es) that you want to connect to and click "Save".

OneDrive conn	ector settings	_		×
Settings				
	Connect to:	✓ OneDrive ✓ OneDrive for Business		
Sign out all		Save	Cance	2

Expand the Personal and Business folders. A Microsoft authentication window will pop up asking you to sign in. Enter your credentials and click "Sign in":

techa	rrow
	Sign in to your account
	officeGATE
Sign in	Work or school, or personal Microsoft account
Use your Microsoft account. What's this?	testuser@tech-arrow.com
testuser@gmail.com	Sign in Back
••••••	Can't access your account?
Sign in	
No account? Create one!	
Forgot my password	
Microsoft	© 2016 Microsoft Terms of use Privacy & Cookies

your vision of technological evolution

business account

Expand your Personal and Business folders and wait for them to load, then freely work with your files.





Wish you sign in with a different user account, open the settings window and click "Sign out all" and sign in again with another credentials.

OneDrive conn	ector settings	_		×
Settings				
	Connect to:	☑ OneDrive ☑ OneDrive for Business		
Sign out all		Save	Cance	el .

General officeGATE settings

General settings of officeGATE allow to set general officeGATE functions such as displaying tooltips, switching between tree view and list view on middle mouse click, drag&drop settings etc. These default settings can be changed in officeGATE settings \rightarrow General settings.

Click on the ^(a) mark in the officeGATE pane and choose **Settings...** The **officeGATE settings** dialog will open. Here switch to the **General settings** tab. The following functions can be configured here:

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V officeGATE Settings	× officeGATE 1. ~ · ·
General settings Providers Synchronization	Tree view III List view ♀ Search Favorites ContentACCESS P P Perceptive Workplace About
General settings	My Computer
 ✓ Show officeGATE panel on startup. ✓ Show officeGATE in mail compose window. 	Chechive Personal Business My SharePoint Sites
Show treeview tooltips.	
By default drag and drop to Outlook copies the link to the document. Holding the CTRL key copies the document itself. Unchecking makes the function work the opposite way. Switch between tree view and grid view on middle mouse click.	
Close previously opened folders when opening a new folder in tree view.	
Language settings	
English	
OK Close	1
WinShortcutter for MAC	

- Show officeGATE panel on startup: If this option is selected, the officeGATE pane will be displayed automatically when opening your Outlook. Otherwise the officeGATE pane will be hidden and you need to click on the officeGATE button (*) to show it. (For more information see the section Launching officeGATE.)
- Show officeGATE in email compose window: If this option is selected, the officeGATE pane will be displayed automatically in any newly opened email message.
- Show treeview tooltips: This feature enables to see the full path, where a certain document is stored.
 If you go with your cursor on the selected folder in the pane, the path becomes visible.



- By default Drag&Drop copies to an email message only the link to the selected document. Holding the CTRL key copies the documents itself, if this (4th) option on the General settings page is turned on. Unchecking makes the function work the opposite way.
- In General settings you can also enable the middle mouse-click, which allows to switch between tree view and list view with clicking the middle-mouse button. For more information about these views check section <u>View selection</u>: Tree view, List view, Collapse all.
- If the "Close previously opened folders when opening a new folder in tree view" option is checked, then the already opened folders will be immediately closed, when a next folder is opened in the tree view. By default this option is turned off.
- Language settings are also available in section General settings. The user has the choice to select the language of the application here. It is possible to select either English, German, Norwegian or Chinese (simplified) language from the dropdown list.

Note: Language selection is also available by installing officeGATE.

Offline file access

officeGATE offers a very comfortable and simple way of how to access your important documents even in offline mode. Any changes that have been made in the document in the source system, on server side, can be synced to officeGATE, to the offline files once you regain internet access again. Keep in mind, that if you make edits using officeGATE while offline, your changes will be saved locally only, synchronization back to the online source system is not supported.

Offline access to the desired information offers several advantages. By working with the files in offline mode, the user can:

- Work with files while being without network connection;
- Being protected from network outages;
- **Boost the efficiency** of progresses instead of working over a slow connection;



If a file is already downloaded for offline access (into the offline database), and the user **double clicks** the respective file, the file is automatically opened from the offline database. This saves enormous time for the user, because opening large files from the server would take much more time, while opening it from an offline database is much faster and effective.

If the online communication with a provider (contentACCESS, SharePoint server etc.) is interrupted (network connection problem, the provider's service is stopped etc.), officeGATE automatically switches the given provider to offline mode. This enables quick access for the user to the given offline information. *Important:* If the problem is troubleshooted (network connection renewed, provider service restarted), the user must connect with the given provider again (main node's context menu option "Connect").

Using officeGATE you can access your documents offline, but only if you first set them up while you have internet access. The **offline file synchronization** is started on a library/folder, on a folder structure or on the file itself immediately when the offline access is enabled for it and there is a network connection.

To a folder/library you can enable:

- plain offline access (option "Enable offline access") only the content of the selected folder/library will be downloaded for offline access
- recursive offline access ("Enable recursive offline access") the entire folder structure starting with the selected parent folder/library will be downloaded for offline access

The changes made in the source system can be then downloaded to the offline files either

 Manually – using the given item's context menu; here you can decide if you want to a) synchronize (update) the offline files/folders based on the changes in the online source system (option "Start synchronization") or b) start the synchronization from scratch, and download everyting regardless of any changes on server side (option "Start full synchronization")

or

The synchronization can be automated, i.e. it will run in specific time slots as defined in the Offline synchronization settings. Auto synchronization updates the already offline files/folders with the changes in the source system. If a file is changed on server side, the local (offline) files are updated; if new files are added on the server side, the new files are downloaded to the offline database as well.



Offline access can be used in every web-based file system interconnected with officeGATE, namely your SharePoint sites, contentACCESS, Perceptive Workplace, OneDrive and OneDrive for Business email- and file containers.

If you want to work with your files offline you need to:

- 1. enable offline access in the officeGATE Offline synchronization settings
- enable recursive or plain offline access for the selected file containers (folders, libraries) or for the files using their context menu – at enabling offline access for the first time the offline synchronization is started automatically
- 3. systematically synchronize (update) your offline documents with the online versions if they are modified (either manually or automatize the process)
- 4. work with your offline files without network connection.

These steps will be detailed in the following subchapters.

Enabling offline file access

By default the offline access (hence the offline synchronization) is turned off. To configure these settings, open the **Offline synchronization** dialog. Click the ^(D) mark in the officeGATE's panes header bar, choose **Settings...** and switch to "**Offline synchronization**" like on the picture below:

		~	1 C C C C C C C C C C C C C C C C C C C			1. 1. 1
VOUR	VICION	Ot	techno	logical	01/0	LUT O
your	VISIOLI	UI.	LECHINO	iugicai	EVU	iutioi
/				0		



V officeGATE Settings	× officeGATE 1. • ×
General Providers Offline Synchronization	Tree view ≡ List view Search
Settings	H My Computer
 Enable offline access Offline access will allow you to browse your data when you are not connected to any network. Enable automatic synchronization every Image: Days Days Synchronize only items modified in last Image: Days Limit space used by offline files to 	 OneDrive Personal Business My SharePoint Sites
Statistics	
Synchronization status Not running Synchronized folders 5 Synchronized files 3 Size of all offline files 82.84 KB Overall offline database size 1.78 MB Last synchronization date 10/23/2018 2:28:17 PM	

To enable offline access for all web-based file systems available in officeGATE, check the "Enable offline access" check box in this dialog. With this step the "Enable offline access" context menu option appears in the file's, folder's, library's context menu.

In the same dialog you can enable automated synchronization of the offline files, too. If automatic synchronization is used, then the offline files are synchronized with the online versions periodically, in the defined time slots if there is a network connection again.

If you wish to synchronize only items modified in the last days/weeks/months/years, check the **Synchronize only items modified in last** checkbox and specify the desired age.

Space used by offline files may be also limited. To do so, check the **Limit space used by offline files to** checkbox and specify the desired size in megabytes.



The current status of the synchronization process, the number of synchronized folders and files and the size of the offline database are featured in section "**Statistics**". The offline database is located in the "C:\Users\[MyUser]\AppData\Roaming\officeGATE" folder (Data Base File "officeGATE.db"). By clicking on the **Clear offline data** button, the offline database will be cleared and offline access will be disabled on all files/emails.

Once the offline access is enabled, you can select the desired libraries/folders/files in the officeGATE pane to be accessed in offline mode.

Selecting items for offline access

If offline access is enabled in the **Offline synchronization** settings, you can select the desired libraries, folders and/or files to be accessed without network connection, and download them to the offline database. These settings are available using the respective item's context menu. Select the respective item in the navigation pane and open its context menu with a right mouse click.

In case of folders and libraries you can enable offline access

- for the selected node (file container) only menu item "Enable offline access", or
- for the recursive folder structure (i.e. including all its child folders or libraries) menu item "Enable offline access (recursive)".





To turn on offline access for a selected file only, locate it in the navigation pane (in list view), open its context menu and select item **"Enable offline access**":



officeGAT	E		- × ×
📲 Tree view 🔳	List view 🔍 S	earch	× @-
Name 🔻 Me	odified	Modified By	File Size
1			
TEST1.docx C TEST2.docx C TEST3.docx C TEST9.docx C TEST9.docx C TEST9.docx C T T T T T T T T T T T T T T T T T T T	Open online Send as atta Send as link Send as ZIP Save docum Copy docum Delete docu Rename doc Create folde Refresh Upload new	chment file ent(s) locally ent(s) ment ument r file	
	Enable offlin	e access	
<			>
<u>My SharePoint Site</u> EBA > <u>MNE testing</u>	s > Testing site > MNE subtest	> <u>Test Cases > E</u> ting (4 items)	<u>:mpty ></u>

Now we will enable offline access (recursive) for our SharePoint library called "**Documents**". By clicking the option the synchronization process, i.e. downloading the items to the offline database is started, it can be seen in the footer part of the navigation pane. The documents, that are currently being synchronized, can be seen in the pop-up window. By clicking the "**Pause**"/"**Cancel**" button it can be paused/stopped at any time if needed, and can be resumed again:





The status of the synchronization process can be checked in the Offline synchronization settings:

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/					



V officeGATE Settings	×	officeGATE	- ×
		Tree view 📃 List view 🔍 Search	× @-
Caparal Dravidars Offling		Eavorites	^
settings synchronization	ut		
synemonization		OW Percentive Workplace	
Settings			
Enable offline access			
Offline access will allow you to browse yo	our data when you are not connected to	Tacting cite	
any network.	-		
Enable automatic synchronization every	1 Days 🗸		
Synchronize only items modified in last	1 📮 Days 🗠		
	1000		
Limit space used by offline files to	4096 WB	DATEV Arbeitsplatz	
Statistics		dectesting2	
Synchronization status	Running		
Synchronized folders	4	EBA	
Synchronized files 7		H FBA's Test Site	
Size of all offline files	484.00 KB	🗄 💓 Herr Feri	
Overall offline database size	896.00 KB	H 💓 Kendox	
Last synchronization date	11/8/2018 5:54:26 PM	🗄 🍸 Mail Management	
Clear offline data		Office integration	
	OK Class	E Synthesis Publishing	
	OK Close	E Synthesis PublishingTestSite	
		E Sy Test Subsite	
		🖽 🥎 MonnieSPA	~
		1	
		Synchronization running (4 left), Can	cel Pause

A little pop-up dialog informs the user when the synchronization is completed:



Now our data in the "Documents" library and its subfolder(s) are synchronized and they are available in offline mode, too:





officeGATE	- × ×
📲 Tree view 🗮 List view 🔍 Search	× @-
Name 🔻	Modified
Δ	
👢 MonnieSPAtest	1/12/2018
👢 MonnieTesting	12/13/201
E 5 steps_122585617.jpg	11/6/2017
Andras Palffy has invited you to 'Testing site'.msg	6/18/2014
🚟 Icon.zip	10/17/2010
🔁 pearsonvue_microsoft_scheduling.pdf	7/29/2016
Troubleshooting_CAVD_setup_errors.docx	7/26/2016
†	
<	>
My SharePoint Sites > Testing site > Test Subsite > Documents (7 items)	

Updating the offline items based on the online changes



The changes made in a folder/document in the source system can be downloaded to the offline files:

automatically using "Automatic synchronization" – this will run based on the Offline synchronization settings and will update the a) file if it has been changed in the source system; b) will add the new file to the offline files if such has been added to the source system; c) will add new folders for offline access if such has been added in the source system (if recursive offline access was enabled on the selected folder); automatic synchronization first time runs when it is enabled in the Settings section (see the picture below), later it runs periodically in the specified time intervals.

V officeGATE Settings	×
General Providers Offline synchronization	
Settings	
Enable offline access Offline access will allow you to browse your data when you are not connected any network.	d to
Enable automatic synchronization every	
Synchronize only items modified in last 1 Days	
Limit space used by offline files to 4096	
Statistics	
Synchronization statusNot runningSynchronized folders4Synchronized files24Size of all offline files2.13 MBOverall offline database size2.75 MBLast synchronization date11/8/2018 5:54:26 PMClear offline data	
OK Cle	se



 manually using the "Start synchronization" (updates offline files/folders based on the online changes) and/or "Start full synchronization" context menu options (downloads everything from scratch) for offline access.



Disabling offline access

Offline file access can be

- Disabled using the "Disable offline access" context menu option (Screenshot A) with this option the user removes all offline metadata and offline files of the selected folder(s) and all of the subfolders, so they will not be available in offline mode.
- Turned off by unchecking the first check box in the Offline synchronization settings (Screenshot B) this doesn't delete the currently downloaded offline files, but the user will not be able to download new files for offline access while this option is turned off.





Screenshot A



VofficeGATE Settings	×
General Providers Offline synchronization	ut
Settings	
Enable offline access Offline access will allow you to browse yo any network.	ur data when you are not connected to
Enable automatic synchronization every	1 Days V
Synchronize only items modified in last	1 Days 🗸
Limit space used by offline files to	4096 📥 MB
Statistics	
Synchronization status Synchronized folders Synchronized files Size of all offline files Overall offline database size Last synchronization date Clear offline data	Not running 4 24 2.13 MB 2.75 MB 11/8/2018 5:54:26 PM
	OK Close
Screensh	ot B

Interrupted manual and automated synchronizations

There can be situations, when the (manual or automated) synchronization is interrupted while it's running, or when the automated synchronization cannot be started. The reasons may be various: Outlook is turned off, there is no network connection in the office etc.

In such cases, officeGATE works like this:



- If Outlook is stopped while the synchronization is running synchronization is reset when Outlook is turned on again
- If network connection is interrupted while synchronization is running synchronization is cancelled
- If automated synchronization should start, but Outlook is turned off if the time set in the Offline synchronization settings is exceeded, synchronization starts automatically at the next start of Outlook; if this time is not exceeded, synchronization is started based on the defined schedule
- If automated synchronization should start, but there is no network connection if the time set in the Offline synchronization settings is exceeded, synchronization starts automatically when the network connection is established again; if this time is not exceeded, synchronization is started based on the defined schedule

License key activation

In the officeGATE Settings dialog click on \bigcirc About tab \rightarrow License button. In the License details window your actual license details will be shown. If you click Change license option the License Activation Wizard window will open. Here you can activate a new license key for the product. If you previously used a free version of officeGATE and now you decided to use Premium version then you need to activate the new license key right here.

	your vision of techno	ological evolution			
	tech	arrow			
VofficeGATE Settings	×				
General Providers Synchronization 1.					
About		Vicense details			×
officeGATE	2. License	\checkmark	officeGATE Version 3.0.6		
Version 3.0.6			Premium version		
Copyright © TECH-ARROW, a. s. 20	16	·	Licensed to:		
TECH-ARROW, a.s.			License key: Valid till:	11/28/2025	
Premium version			vana cin	11/20/2025	
officeGATE is a free MS Outlook add with your local file-system, SharePoi and many other providers.	-in connecting your email client nt Online, OneDrive, Dropbox	Providers v contentA PW Perceptiv My Comp	CCESS e Workplace buter		
techarrow		My Share	Point Sites		
Your vision of technological evo	lution.				
	OK Close	Change license	⊧ 3.		ОК
🟹 contentGATE Data	Migration				

There are two options how to activate a license key:



License Activation Wizard	_			\times
Enter your license key				
Welcome to the license activation wizard. Please enter your license key fi select the activation method.	or the	product a	and	
License key		-		
	E	<u>Proxy setti</u>	ngs	
Online activation (internet access required)				
Offline activation				
Nex	t	Car	ncel	

- 1) If you choose online activation (internet access is required) click Next and your license will be activated automatically.
- 2) If you choose offline activation (no internet access is required) click Next and send the license request information from the textbox below to the TECH-ARROW sales department. You can simply copy the License request information text directly to the email or you can save the information via <u>Save to file</u> option in .dat format and send the request as an attachment. TECH-ARROW sales department will generate the activation data for you. Once the sales department delivered back the .dat file for you, click <u>Load from file</u> option under the License activation information box on right side and upload .dat file that you have received. Click Next and the license key will be successfully activated.





Handling with documents using officeGATE

In the chapters above we have learnt how to launch officeGATE and how to connect to the desired providers (document management systems) that we want to work with. The next chapters will show how to handle with the documents using officeGATE.

Setting favorites

If you have a couple of folders/documents that you need to use more frequently, officeGATE offers the possibility to define them as favorites and have an easier access to them. The yellow star (the 1st node) in the officeGATE's tree view collects your favorites.

Note: The tooltips of Favorites show the parent folder, which makes the navigation even easier.



To add a folder, library or contentACCESS plugin between **Favorites**, click on it in the pane, open its context menu and select **Add to favorites** from the list. The selected folder/library will be shifted under the **Favorites** node.



If you move with the cursor over the folder/library in the **Favorites**, the tooltip will open. The tooltip text shows the path of the selected folder/library.



You can remove the selected locations if you do not want them to be included between favorites anymore. To remove a favorite location from the list, open the **Favorites** node (blue star) from the pane, select your favorite, open it's context menu and click on **Remove from Favorites** option.



View selection: Tree view, List view, Collapse all

There are 3 main views available in the officeGATE's status pane:

- ✓ Tree view (Screenshot A);
- ✓ List view (Screenshot B)
- ✓ and **Collapse all** (Screenshot C).



The user may also switch between tree view and list view a middle-mouse click, if this option is enabled in the **General settings** of officeGATE (read more in section <u>General officeGATE settings</u>).

OfficeGATE Tree view ≡ List view Search Favorites ContentACCESS Email archive (MNE Tenant) File system archive (MNE Tenant) SharePoint archive (MNE Tenant) SharePoint archive (MNE Tenant) SharePoint archive (MNE Tenant) PW Perceptive Workplace My Computer My Computer SharePoint Sites	▼ X ,* @-	officeGATE Tree view ☐ List view Search Name C \\tacatest\testfiles4 C.\O TESTFILES C.\CorruptDelete C.\MonnieFile C.\TESTFILES0 C.\TESTFILES1 C.\TESTFILES3 C.\TESTFILES3 C.\TESTFILES5 C.\TESTFILES5 C.\TESTFILES5 C.\TESTFILES5 C.\TESTFILES5 C.\TESTFILES5 C.\TESTFILES8 C.\TESTFILES9	▼ X ,* @-	OfficeGATE Tree view :≣ List view Search → → Favorites → → Perceptive Workplace → → My Computer → → OneDrive → → My SharePoint Sites	Collapse all
¥		<u>contentACCESS ></u> File system archive (MNE Tenant) (11 items)			

A) **Tree view** [^{*}]: This view displays all available providers and presents a hierarchical view of information. Each provider in the Tree view has a number of child nodes (a child node can either be a folder in a local or cloud file provider, a library or folder in SharePoint or a plugin in contentACCESS). A provider can be expanded to reveal child nodes, and collapsed to hide them. To expand a provider, click on plus sign "+" and locate the child node that you want to work with. With a right click on the child node you may open its context menu. The context menu options depend on the particular provider.

Screenshot B: List view

Screenshot C: Collapse all

Screenshot A: Tree view

The user can add the selected child to the list of favorites, rename, delete, open selected folders, create new subfolders from the context menu directly or upload new files into it. The first table of chapter <u>Working with</u> <u>nodes and files using the context menu</u> gives an overview for the user about the nodes' context menu options that are available in the respective officeGATE providers.

With the **Collapse all** option you can collapse the nodes that have been previously opened in the Tree view mode (Screenshot C above).


B) List view [I]: In this view the contents (folders, documents etc.) of the selected parent folder are listed. The topmost entry is displayed as ".." and links to the parent location when it's clicked. In List view, at the bottom of the pane you can also see the path (breadcrumbs) where a certain document is located in your file system. The user can click on a breadcrumb element to easily navigate to a parent location.



Sorting in List view

officeGATE enables to sort the items based on column headers in the list view. If you choose a different provider, then different headers are displayed. On our illustrative screenshots below a SharePoint folder is chosen, where the files can be sorted by 3 column headers (sorting criteria), namely: **Name, Modified** and **Modified by**. On the second picture the files are sorted by the date when they were last modified.

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Tree view 🗮 List view 🔍 Sea	rch 💉 🔇	}-
Name	Modified	N B
1		
👢 MNE testing	11/21/2016 10:45 AM	Di
👢 Subfolder2	10/4/2016 12:16 PM	Ec
👢 Subfolder1	9/28/2016 10:20 AM	Ec
TESTe.docx	11/10/2016 8:51 AM	Di
TESTx.docx	11/10/2016 8:41 AM	Di
MEETING MINUTES-2016.docx	10/27/2016 11:25 AM	Ec
🖂 Test case for officeGATE setup.msg	10/26/2016 12:10 PM	Ec
officeGATE setup test case.xls	10/26/2016 12:09 PM	Ec
Tigrincske2.docx	9/28/2016 8:25 AM	Ec
Tigrincske3.docx	9/28/2016 7:38 AM	Ec
Tigrincske1.docx	9/21/2016 1:38 PM	Ec
test.docx	9/20/2016 4:07 PM	Ec
EBAtestFILE.txt	9/13/2016 2:32 PM	Ec
searchingwithofficegate_eba.docx	9/13/2016 1:19 PM	Ec
🚳 officeGATE1.db	8/5/2016 9:54 AM	Ec
🚳 officeGATE.db	8/5/2016 9:21 AM	Ec
1		>
`		1
<u>My SharePoint Sites > Testing site >]</u>	<u> [est Cases > Empty ></u>	
EBA (16 items)		

Screenshot A: Sorting the SharePoint files in order "from youngest to oldest"

officeGATE * *			
🗄 🖥 Tree view 🗮 List view 🔍 Sear	ch 💉 🔅	}-	
Name	Modified -	N B	
1			
👢 Subfolder1	9/28/2016 10:20 AM	Ec	
👢 Subfolder2	10/4/2016 12:16 PM	Ec	
👢 MNE testing	11/21/2016 10:45 AM	Di	
officeGATE.db	8/5/2016 9:21 AM	Ec	
officeGATE1.db	8/5/2016 9:54 AM	Ec	
searchingwithofficegate_eba.docx	9/13/2016 1:19 PM	Ec	
EBAtestFILE.txt	9/13/2016 2:32 PM	Ec	
test.docx	9/20/2016 4:07 PM	Ec	
Tigrincske1.docx	9/21/2016 1:38 PM	Ec	
Tigrincske3.docx	9/28/2016 7:38 AM	Ec	
Tigrincske2.docx	9/28/2016 8:25 AM	Ec	
officeGATE setup test case.xls	10/26/2016 12:09 PM	Ec	
Iest case for officeGATE setup.msg	10/26/2016 12:10 PM	Ec	
MEETING MINUTES-2016.docx	10/27/2016 11:25 AM	Ec	
TESTx.docx	11/10/2016 8:41 AM	Di	
TESTe.docx	11/10/2016 8:51 AM	Di	
<		>	
<u>My SharePoint Sites > Testing site > 1</u>	est Cases > Empty >		
EBA (16 items)			

Screenshot B: Sorting the ShrarePoint files in order "from oldest to youngest"

Searching in officeGATE

By using the search filter the user may quickly find the document what he is looking for. Searching among files stored in the respective officeGATE providers is provider specific. This means, that officeGATE search uses the search engine(s) of the respective provider. Search button is located in the header part of the officeGATE pane.



It is possible to search

a) In all available (available=connected) providers → in this case select the "All providers" from the "Location" dropdown list, specify the keyword and click "Search". 3 columns will be listed as a result; a column with icons, a column containing the name of the documents and the last column containing the respective provider (in case of contentACCESS the model name is also visible).

of	fice Tree v	GATE riew ≣ List view	arch	بر الج	× ŵ-
Sear	rch in	All providers	\sim		
Key	word	virtual drive		₽ Search	
103	103 document(s) found containing 'virtual drive' in All pr				
	Nam	e 💌	Provider		^
Ø	13val	ues.htm	My ShareF	oint Sites	
1	árvítü	rő tükörfúrógép.txt	My ShareP	oint Sites	
1	Azure	.png	OneDrive		
W	Brattl	e Japan Report Appen	My ShareP	oint Sites	
W	conte	ntACCESS - v2 6-relea	contentAC	CESS (Sh	
W	conte	ntACCESS - v2 6-relea	contentAC	CESS (Sh	~
3	1				

b) In one of the connected providers → in this case select the desired provider from the "Location" dropdown list, enter the demanded keyword and click "Search".

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officeGATE	•	×
🗄 📲 Tree view 🗮 List view 🔍 Search	1	¢-
Search in contentACCESS ~		
Keyword virtual drive	₽ Search	1
4 document(s) found containing 'virtual drive'	in content.	
Name	Туре	м
contentACCESS - v2 5-release notes_v3.doc	docx	Sh
contentACCESS - v2 6-release notes_v8.doc	docx	Sh
contentACCESS - v2 6-release notes_v8.doc	docx	Sh
Troubleshooting_CAVD_setup_errors.docx	docx	Sh
<		>
7		
•		

c) In the selected node's content (node=folder or library) → In this case locate the desired folder/library in the tree view and click on it. Then click on the magnifier mark in the pane to open the search page. The Location will be already preselected. Specify the keyword and click "Search".

The following use case will demonstrate how to search for contentACCESS related documents in the "Documents" SharePoint library. Select the "Documents" library under the SharePoint node, and click on the magnifier mark (^S):



Specify the keyword that you are looking for (in our use case "contentaccess") and click on **Search**:



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Tree v	riew 📰 List view 🔍 Search	ن ې-
Search in	Documents ~	
Keyword	contentaccess 🖉 🖉 Searc	:h
9 docume	nt(s) found containing 'contentaccess' in Doci	J
Name	-	Path
🙆 conten	tACCESS license error.msg	https
🔯 Debugl	Log.txt	https
🙆 Fekete	és fehér - mai divat klasszikus színekben .msg	https
🙆 Give us some likes and shares on msexchange.msg 🛛 h		
Mew contentACCESS setup 2 1 0 0 is ready.msg		
🙆 New co	ntentGATE setup x64 1 20 6 is ready.msg	https
💇 officeG	ATE product demos.msg	https
🕂 RE test	t.msg	https
🛃 SGP - d	ontentACCESS License Key.pdf	https
<		>
7		

9 documents have been found, of which title or text contains phrase "contentaccess".

Searching on the local disks – indexing options

If the user selects **My Computer** from the **Location** dropdown list (i.e. he is searching for a document that is located on a local disk) the "**Options**" button appears on the search page. With clicking on this button the user may check the local disks that are already indexed.





Note: Only the documents located on the **indexed local disks** can be searched for.

lndexing Option	s		×
6 232 Index	items indexed ing complete.		
Included Locations	History	Exclude AppData; AppData	
Modify	Advanced	Pause	
How does indexing affe	ect searches?		
Troubleshoot search a	nu muching		Close

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The following operations are available from the context menu of the searched items (from the search page):

- Send as attachment*
- Send as link*
- Send as ZIP file*
- Save document(s) locally*
- Copy document(s) *
- Open*
- Open contentWEB*

Open parent directory: Click this menu item to open the parent directory of the selected file. This context menu item is available from the search page only.

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1	Tree	view 🔚 List view	🔍 Search		Ś	≱-
Sea	rch in	contentACCESS		\sim		
Key	word	contentACCESS			₽ Search	
200) doci	ument(s) found con	taining 'conte	entAC	CESS' in co.	
	Name	2				^
1 2	TECH-	ARROW contentAC	CESS - der W	leg zu	r Produktiv	
W	Install	ation protocol - cor	ntentACCESS	Bego_	20170907.	
W	Ľ⊗	Send as attachme	ent	ort.d	ocx	
	Ľ₿	Send as link		ndo	ws File Serv	
J.	2	Send as ZIP file		L .		
W	±	Save document(s)) locally	×		
<u>es</u> 1	Ē	Copy document(s	;)	CH)	is ready.ms	
Q	C	Open		ı.ms	g	
<u>e</u> 1	-	Open contentWE	В	Jy.m	sg	
<u>e</u> 1	C	Open parent dire	ctory	r.ms	g	
New contentAccess setup 3.5.3 is ready.msg						
2	New o	ontentAccess setup	3.3.21 is rea	dy.ms	9	~
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3						
	•					

*These features are described in details in chapter Working with nodes and files using the context menu of this guide

Search query language

The search query language is used to specify conditions on documents which have to be returned as result when searching the archive. The search query language used in any user interface of contentACCESS can be divided into following categories:

Source specification

The searching user can specify where to search on different levels: tenant, model, entity

Tenant:(string) - select a tenant by name; search in tenants having the specified string in name

MTID:(string) - select a model by type identifier (EmailArchive, FileSystemArchive, SharePointArchive)

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Source:(string) – select a model by keyword; search in models having the specified string as a keyword (email, file, sharepoint). This is similar as the MTID mentioned, but accepts more free model specification. Possible values are:

- For FileSystemArchive: file, fs, filesystem, archive
- For EmailArchive: archive, email, mail, mailarchive, emailarchive

Examples:

- source:file
- source:mail

Entity:(string) - select one or more entities by name; search in entities having the specified string in name. Entity name is **mailbox address** in **Email archive** and **Root folder path** in **File system archive**.

Examples:

- entity:abal@tech-arrow.com search in ABAL's mailbox
- entity:c:\temp search in c:\temp folder

Property value specification

The following properties can be used to specify conditions on documents to be returned as result when searching the archive:

Date

Applicable only for properties of "date" type. Exact date specification has to be in format YYYY-MM-DD (no hours, minutes, seconds can be specified).

Example:

date:(2016-12-05)

Available placeholders: now – means this hour; today, yesterday, this week, last week, this month, last month, this year, last year

Example:



date:(now), date:(last week)

Number

Numbers are written as usually (1, 2, 3...). For the size conditions also units can be specified:

- K | KB size in kilobytes
- M | MB size in megabytes
- G | GB size in gigabytes
- T | TB size in terabytes

Example:

size:(>1K) – files or emails (depending on the archive) larger than 1 KB

Range

Two types of ranges can be specified: numerical and date ranges. Ranges can be upper bound, lower bound or an interval. A range can be specified as a value for all properties of type "date" and "number".

Prop:(>value) - the value of property "Prop" is greater than "value"

Prop:(<value) - the value of property "Prop" is less than "value"

Prop:(value1, value2) - the value of property "Prop" is greater than "value1" and less than "value2"

Examples:

- size:(1K, 1M) files/emails (depending on the archive) larger than 1KB and smaller than 1MB
- date:(2016-10, 2016-12) files created/modified or emails sent (depending on the archive) in the last quarter of 2016

Filename

Finds items by attachment name (Email archive) or file name (File archive). Wildcard characters can be used for filename pattern specification (* or ?). They have the same meaning as when searching for files in Windows.

Filename:(*.txt) - this will find all attachments and files having the extension .txt

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Filename:(file) - this will find attachments and files having the exact name "file"

Filename:(file.*) - this will find attachments and files named "file" of any type (extension)

Properties in different archives

When specifying a boolean value for a property in query, the following notations can be used:

- true | yes | y stand for True
- false | no | n stand for False

Property names and values are not case sensitive. Wildcard characters (* and ?) can be used everywhere.

The character '|' means an option or alternative (in cases if multiple property names and values can be used).

If the value is specified in quotes (e.g. "value"), it is considered as a phrase.

Example:

• "brown fox" will find all documents that contains the words "brown" followed by word "fox"

Email properties

The properties below are applicable when searching in Email archive

Property	Specificity	Description
HasAttachment:	true false	if true, finds emails having one or more attachments; if false, finds emails having no attachments
Importance:	Low Normal High	finds emails with the specified importance level
Sensitivity:	Normal Personal Private Confidential	finds emails with the specified sensitivity level
Flag:	true false	find emails having a flag set (true) or not set (false)
AttachmentCount:	(number)	finds emails with the specified attachment count
Bcc:	(string)	condition on addresses in BCC tag of the email
Category:	(string)	condition on category

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Cc:	(string)	condition on addresses in CC tag of the email
		condition on folder path; possible to find emails only in
Folder:	(string)	the specified folder (backslash is used as path separator,
		e.g. Inbox\Important)
ReceivedDate:	(date)	condition on receiving date
RetentionTime:	(number)	condition on retention time (in months)
Sender From:	(string)	condition on email sender
Date SentDate:	(date)	condition on email's sent date
Size:	(number)	condition on email's size in bytes
Title Subject:	(string)	condition on email subject
То:	(string)	condition on email's recipient
Body:	(string)	search in the mail's body text
Attachment:	(string)	search in mail's attachment text

File properties

The properties below are applicable when searching in File archive

Property	Specificity	Description
CreationDate:	(date)	condition on file's creation date
Title Filename:	(string)	condition on file's name
Folder:	(string)	condition on file's path (\ is the path separator as in Windows, e.g. c:\documents\rfa)
Date ModifiedDate:	(date)	condition on file's creation date
Size:	(number)	condition on file's size in bytes



SharePoint document properties

The properties below are applicable when searching in SharePoint archive

Property	Specificity	Description
CreatedBy:	(string)	condition on user who created the file
CreationDate:	(date)	condition on creation date
FileSize:	(number)	condition on file size
Date ModificationDate:	(date)	condition on modification date
ModifiedBy:	(string)	condition on user who modified the document
Name:	(string)	condition on document name
Title:	(string)	condition on document title
VersionNum:	(number)	condition on document's version number

Working with nodes and files using the context menu

The officeGATE user handles with his folders/libraries/documents using the context menu of the respective folder/library/file in the pane. The table below lists all available operations in the context menu of a folder/library. Locate your desired folder/library in the pane, right click on it to open the context menu and work with it: add it to favorites, upload new files to it, rename it etc. The available operations are dependent on the system (provider) that you use. The table below gives a general overview about the available options:

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Ducuidana	Operations on folders/libraries using	
Providers	their context menu	
contentACCESS	 ✓ Open contentWEB ✓ Add to favorites ✓ Upload new file ✓ Refresh ✓ Enable offline access ✓ Enable offline access (recursive) 	OfficeGATE * * Tree view) Image: List view On Search * @* Favorites * @* Favorites * @* ContentACCESS * @* Email archive (TECH-ARROW, a. s.) * @* * Open contentWEB * Add to favorites * Open contentWEB * Open contentWEB * Add to favorites * * Open contentWEB * Open contentWEB * Open contentWEB * * Open content VEB * * Other content with them secess * * File system archive (TECH-ARROW, a. s.) * * Sharing (TECH-ARROW, a. s.) * * OneDrive * * * My SharePoint Sites *
Perceptive Workplace	 ✓ Open online ✓ Add to favorites ✓ Upload new file 	officeGATE ✓ × Tree view ::::::::::::::::::::::::::::::::::::



- X

My Computer (including local Dropbox and OneDrive folders)	 ✓ Open ✓ Create folder ✓ Rename folder ✓ Delete folder ✓ Add to favorites ✓ Upload new file ✓ Refresh 	officeGATE Tree view i≡ List view Search Favorites ContentACCESS PW Perceptive Workplace My Computer Desktop My Documents Create folder Create folder C
SharePoint	 Ibrary: Open online Create folder Add to favorites Upload new file Refresh Enable offline access Enable offline access (recursive) folder: Open online Create folder Rename folder Pelete folder Add to favorites Upload new file Add to favorites Upload new file Add to favorites State folder Add to favorites Enable offline access (recursive) 	officeGATE Tree view ist view





The following subchapters describe general rules of working with files saved in the particular systems (providers) of officeGATE. Operations on the files are available from the files' context menu, in list view. Some of the operations are available in one system, but are unavailable in another. The table below gives a general overview about the file's context menu options using different providers.



officeGATE	Operations on files using their context	
providers	menu	
contentACCESS	 ✓ Open online ✓ Send as attachment ✓ Send as link ✓ Send as ZIP file ✓ Save document(s) locally ✓ Copy document(s) ✓ Create folder ✓ Refresh ✓ Upload new file ✓ Enable offline access 	officeGATE ✓ × Image: Tree view Image: List view Search ✓ Image: CreationD FileName Size Folder CreationD Image: Tree view Image: Size Send as attachment Gize017 Image: Size Send as ZIP file Gize017 Gize017 Image: Size Save document(s) locally Gize017 Gize017 Image: Comp document(s) Image: Comp document(s) Gize017 Gize017 Image: Comp document(s) Image: Comp document(s) Gize017 Gize017 Image: Comp document (s) Image: Comp document (s) Gize017 Gize017 Image: Comp document (s) Image: Comp document (s) Gize017 Gize017
Perceptive Workplace	 ✓ Open online ✓ Send as attachment ✓ Send as link ✓ Send as ZIP file ✓ Save document(s) locally ✓ Copy document(s) ✓ Create folder ✓ Refresh ✓ Upload new file ✓ Enable offline access 	OfficeGATE Tree view Itist view Search FileName Size Folder CreationD Send as attachment 1/18/2018



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	✓ Send as attachment	E Tree view E List view Q Search ✓ Ø•
	✓ Send as link	Name ▼ Extension Last modified Size
My computer	✓ Send as ZIP file	PM 956.
(including local	✓ Save document(s) locally	Image: Digit Send as link PM 982. Image: Digit Send as 7IP file PM 1.01
Dropbox and	✓ Copy document(s)	Serie as 21 mile PM 1.05 Save document(s) locally PM 974.
OneDrive files)	✓ Delete document	Delete document
	✓ Rename document	Rename document
	✓ Create folder	2 Refresh
		 Upload new file
	✓ Upload new file	
	✓ Open online	officeGATE • ×
	✓ Send as attachment	Tree view 🗮 List view 🔍 Search 💉 🐼
	✓ Send as link	Name Modified
	✓ Send as ZIP file	MNE testing 11/21/2016 10:45 AM D
	\checkmark Save document(s) locally	■ Subfolder2 10/4/2016 12:16 PM E
	✓ Copy document(s)	الله الله الله الله الله الله الله الل
Sharepoint	✓ Delete document	offi Goffi G Send as link 1 Ei Send as ZIP file
	✓ Rename document	Save document(s) locally M E
	✓ Create folder	The Letter B Delete document M E
	√ Refresh	Testing Create folder AM D
		Tigr 2 Refresh
	✓ Upload new file	Upload new file
	✓ Enable offline access	Enable offline access

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	✓ Open online		
	 ✓ Send as attachment 	officeGATE	▼ X
	✓ Send as link	Tree view 🗮 List view 🔍 Search	d Size
	✓ Send as ZIP file	▲ Colors 12/6/2017 8:1	17 AM
	✓ Save document(s) locally	Open online Open online	M 33
OneDrive and OneDrive for	✓ Copy document(s)	■ 03 Cg Send as attachment	M 6
	✓ Delete document	Save document(s) locally	M 2
business	✓ Rename document	Copy document(s)	VI 12 VI 46
	✓ Create folder	Rename document	
	✓ Refresh	C Refresh	
	✓ Upload new file	Upload new file Enable offline access	_
	✓ Enable offline access		_

For instructions on everyday use cases of working with files in officeGATE, read the below described topics. Select your provider from the officeGATE pane and connect to it if it's not connected automatically. Then switch to list view, locate the file(s) that you want to work with, and open its context menu (with a right click on it).

Open contentWEB

Note: This option is active only on the contentACCESS provider.

It is possible to open <u>contentWEB</u> directly from officeGATE in Outlook. The function can be used on:

provider node – redirects the user to contentWEB; no specific entity, folder or item is selected



 entity node - opens the selected entity (mailbox, file archive root, etc. - depending on model type) in contentWEB

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Tree view	ist view 🔍 Search	× @-
🗄 📌 Favorites		
🖶 🟹 contentACO	CESS	
🕀 🔤 Email a	rchive (TECH-ARROW, a.	s.)
🖽 💼 File sys	tem archive (TECH-ARRC	W_RFA)
🖃 🐻 ShareP	oint archive (TECH-ARRO	W, a. s.)
⊞… <mark>§</mark> > Te	charrow	
🗄 🕌 🏹 Sh 🛹	Open contentWEB	
🗄 🛛 Pw Percep 🏠	Add to favorites	
🗄 🖳 Му Со 🞜	Refresh	
🗄 🗠 🏠 OneDr	Enable offline access	
🗄 🔤 🚺 My Shi	Enable offline access	(recursive)

folder node - opens the selected folder in contentWEB



document node - shows the selected document (email, file...) in contentWEB



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i 🖫 T	ree view 🔳	List view	Search		ا ن) -
Fi	eName	Size	Folder		CreationD
↑ ⊫ Pa ⊫ So	rent folder me patterns				
-	Open conte	entWEB		N	3/7/2018 1
[7]	Open onlin	e		N	3/7/2018 1
	Send as att	achment		N	3/7/2018 1
53	Send as lin	k		N	3/7/2018 1
	Send as ZIF	^o file		N	3/7/2018 1
•	Save docur	nent(s) loc:	ally	—-V	3/7/2018 1
Ē	Copy docu	ment(s)	ally	N	3/7/2018 1
Ē	Create fold	er			
c	Refresh				
Ð	Upload nev	w file			
	Enable offl	ine access			

Online opening and editing of files directly from officeGATE

If you need to check a file or to do any modifications to it, choose **Open online** from the file's context menu. This context menu option opens the respective file online, from the server (source system) directly. To edit the file, do the necessary corrections in it and save it. This way you can do the necessary corrections faster and more effectively, without downloading and uploading the file to the folder or library again.



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Tree view	/ 📰 List view 🔍 Se	arch 💉	<u>ې</u>
Name	 Extension 	Last modified	Size
îL			
📕 Colors		12/6/2017 8:17 AM	
🕮 01.pn	000	9/11/2017 12:40 DM	33
🙉 02.pn	Open online		18
🙉 03.pn	Send as attachment	t	6
🙉 04.pn	Send as link		15
🕵 04-1.	Send as ZIP file		2
🕦 05.pn 🛓	Save document(s)	ocally	12
🙉 Conte 🗖	Copy document(s)		46
🎫 Detail 🗟	Delete document		15
3	Rename document		
[⊕	Create folder		
3	Refresh		
Ð	Upload new file		
	Enable offline acce	SS	

Note: The file is downloaded **locally** into a temporary folder if it is **double clicked**. If you open a locally downloaded file and edit it, the changes will not be synchronized back to the source (online) location. This is quite important if you have online systems (e.g. SharePoint, Perceptive Workplace). If you use the "Open online" context menu item, the file will be opened in the source system directly in a web browser (online) and the changes will be synchronized online as well.

Sending attachments/links to the file

You can decide if you want to send the file as an attachment or you prefer to send a link to the file instead. If you want to send the file itself right click on the file and choose \Im Send as attachment from its context menu. If you want to send the link to a file only choose option \Im Send as link from the file's context menu. It is possible to select multiple files to attach, or to send links to multiple files.

Sending links instead of attachments ensures one "version of the truth", it keeps all project-related documentation in one place, and it saves email storage.



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Sending ZIP files

With the **Send as ZIP file** function the user may compress the selected files into a ZIP file and send them to the desired address as a ZIP file.

- Select the desired items from the pane, open the context menu and select Send as ZIP file option from the list.
- 2. The **ZIP file name** dialog opens. Rename the ZIP, (by default it's called officeGATE.zip) and click **OK**.
- 3. Send the files to the addressee.



1: Select the files and click on "Send as ZIP 2: Rename the ZIP

3. Send the ZIP

Saving document(s) locally

The user can also save one or multiple documents locally on his local disk. Select the items that you want to save and open the context menu. Select **Save document(s) locally** from the list. Locate the folder where you want to save the items and click on **Select folder** to save it.

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2.png 😭 Send as ZIP file	CESS (🧢 This PC	Custom Office Templates	20-Dec-16 12:06	File folder		
尾 20.pn 🛨 Save document(s) locally	CESS (3D Objects	My Received Files	05-Jun-17 12:46	File folder		
conter Copy document(s)	CESS (E Desktop	Outlook Files	05-Sep-17 17:26	File folder		
Conter B Bename document	CESS (Documents	SQL Server Management Studio	06-Apr-17 16:09	File folder		
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Copying/pasting document(s)

Selected documents can be copied into another providers' folder or library. Just open the file's context menu and select **Copy document(s)** from the list. Then navigate to the target location where you want to make a copy, click on it and open its context menu. Select **Paste document(s)** from the list and wait until officeGATE uploads your document(s) to the target location. Copy/paste function works with CTRL+C/ CTRL+V control codes, too.



Screenshot A: Copy document(s) from a source location

Screenshot B: Paste document(s) to a target location

Deleting document(s)



To delete one or multiple documents from the file system, open the document's context menu (in list view) and click on **Delete document**.



Renaming document(s)

To rename a document in the file system, open the document's context menu (in list view) and click on **Rename document** from the list. The **Rename document** dialog opens. Type into the text field the desired document name and click on **OK**.



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Creating folder(s)

To create a new folder select **Create folder** option from the item's context menu (or switch to list view and right click into the navigation pane). The **Create new folder** dialog opens. Type in the folder's name and click **OK**.



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Uploading new file(s)



The user may upload new files into the selected folder/library from the folder's/library's context menu. Open the context menu, select **Upload new file** from the menu, browse for the desired document and wait until the upload process has ended.



Uploading a file from the tree view

Folder refresh/provider refresh

The "Refresh" context menu option is available in the providers' and files' context menu options as well. It is usually used to refresh the content of the given provider/folder. E.g. if a new file has been added to the source system (e.g. to a SharePoint folder), you can refresh the list of items in this folder using this option:



Sharing files directly from MS Outlook

An easy access to files (e.g. to big files that cannot be sent as attachments) can be ensured by saving them to a special folder (called "My share"), which is accessible under contentACCESS's "Sharing" plugin in the officeGATE pane. This contentACCESS plugin is used to collect the file(s) to be shared with second users. When uploading a file to the "My share" folder the application automatically generates a link pointing to the file, and the user can share this link with second users. It is possible to send links to the already uploaded file using its context menu, too.

Note: The sharing feature is available only in case that you use contentACCESS provider and the Sharing plugin is licensed.

The following steps must be done before sharing files using officeGATE:



1. Configure a "Sharing" job in contentACCESS. A "Sharing" job can be configured in the Custom plugins section (*Custom plugins* \rightarrow *General* \rightarrow *Jobs*) in the Central Administration interface of contentACCESS (more information <u>here</u>).

2. Connect your officeGATE with contentACCESS. Click "Connect" in the contentACCESS node's context menu to open the settings dialog and set the necessary parameters to connect to contentACCESS.

3. Configure the values (download count and expiration date) of sharing the files. This option is available in the contentACCESS connector settings, in the Sharing section. The values can be changed directly from the upload dialog as well (described later).

contentACCESS	connector settings				_							
Settings												
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	Server name:	Generate conne	ection URL									
	Connection URL:	http://tacatest.ta.ir	nternal/contentACC	ESSWS/ModelService.sv	c							
	General											
	Items per page in list view	:	200									
	Maximum number of look	up items:	20									
	Sharing	id don't ask before n	ew sharing									
	Expiration days:		1									
	Download count limit:		1	0 = no limit								
					_							
Login	Logout				Save	Cancel						

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After successful connection expand the contentACCESS node. The sharing plugin is located under contentACCESS node in the officeGATE pane. The shared files will be saved into the folder located under this node.



4. If contentACCESS is connected with officeGATE, **you can share files**. There are 2 options how to do it:

a) **From the toolbar**: Click on the "Share with contentACCESS" button in the MS Outlook toolbar and locate the file that needs to be shared. Click "Open". The main advantage of this first option is, that the user does not have to locate the Sharing plugin in the pane.





b) From the share folder's context menu: Open the context menu of the "My shares" folder under the "Sharing" plugin and select "Share new file" from the menu. Select the file that needs to be shared and click "Open".

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5. The "Process document with contentACCESS" dialog will open automatically. The user may change here the

- Expiration date the time period of keeping the file in the My shares folder
- Download limit the maximum number of downloads

The default values are automatically filled in according to the contentACCESS settings described in step 3 above. Change the values for your share if needed and click "Upload" to start the upload process.

$rac{1}{2}$ Process document with contentACCESS – \Box X								
	Target My shares							
Document								
Name	C:\Users\mne\Desktop\Monika2\Obrázky\Photoshop\Mojito bubblete	a\56f9b272f0	ef1.image	e.jp <u>c</u>				
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You may change the default expiration date and download count directly in this dialog, too. Simply enter the desired values into the text boxes, check the "Save as default" checkbox in the down left corner and upload the file. The newly specified values will be applied by each new upload. With checking the "Don't ask again" option the application will use the same default settings by each share, and won't ask the user again. These settings can be modified again in the **contentACCESS connector settings** dialog, on the **Sharing** tab.

6. After the upload is completed, a compose email window with a link to the file will automatically open. The user can send the message with the link to somebody else.

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It is also possible to attach a contentACCESS file directly from the compose window. Click the **Attach contentACCESS file** button in the toolbar and opt for the file that should be attached.


7. Wish you open/edit/share a file from the "My shares" folder later on, locate it in the pane, open the context menu and work with it:



Drag&Drop actions

Drag&Drop actions help the user to save the files into a desired file system or attach them to an email message directly in MS Outlook, with a simple move of mouse.

Attaching files to email message

With clicking on the "New Email" button in MS Outlook open a compose window and start to write the message. In the compose window's sidebar locate your file(s) that you want to attach, and drag it (them) into the email message. It is possible to drag&drop multiple files at one go. With the Drag&Drop action you may attach the file as an attachment, or as a link. In the **General settings** (for more information refer to section <u>General officeGATE settings</u>) you can set how you would like to use this function.



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Uploading emails/attachments directly from the mailbox

With a move of your mouse you can upload attachments from any email message to the desired folder/library of your provider. It is also possible to upload the whole email message (as an .msg file).



Manual email archiving using contentACCES

Drag&Drop function may be very useful if the user would like **to archive emails into contentACCESS manually**. Simply Drag&Drop the desired email from your MS Outlook into the email archive folder (under contentACCESS node) and your message will be automatically archived.

Search Current Mailbo	ox (Ctrl+E) 🔎 🔻	요 Reply 🛱 Reply All 😂 Forward 중 IM	officeGATE • ×
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dar People	e Tasks •••		



If the email has been already archived and the user drops this message to officeGATE, the application will warn him about that. The user will be asked, if he wants to archive the original email instead.



Handling emails - archive, restore, search

It is possible to archive, restore and search your archived emails directly from your MS Outlook.

o₂ 📑 ∽ ·		@tech-arrow.com - Outlook	
FILE HOME SEND / RE	ECEIVE FOLDER VIEW DEVE	OPER a a a a a a a a a a a a a a a a a a a	
New New New New New New New New New Delete	Delete Reply Reply Forward Min Mon	ting Team Emails to archive G To Manager Team Emails to archive G To Manager Team Email Reply & Deleter Team Email Quick Steps n Wove Rules OneNote Move Rules OneNote Move Rules OneNote Move Rules OneNote Move Rules OneNote Tagas	Share with contentACCESS officeGATE Email Archive Email Em
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ITEMS: 1,232		ALL FOLDERS ARE UP TO DATE. CONNECTED TO: MICROSC	FT EXCHANGE 🔲 🕮

If you want to use this function, the following steps must be completed first:

- officeGATE must be connected with contentACCESS
- Email archive must be configured for the selected mailbox



• Email archive job must be run at least once before for the mailbox

If the mail has been archived before, the option **Archive** will be disabled and **Restore** enabled (screenshot A). If the mail hasn't been archived yet, the **Restore** option will be disabled and **Archive** enabled (screenshot B). When archiving an item, properties set for the mailbox in the <u>Address book</u> will be applied to the mail.



Note: For more information about email archiving and restoring, please check these sections : <u>archive</u>, <u>restore</u>.

Note: The **Split attachments** option is active (checked) by default. That means that the body of the email and the attachment are stored separately. If the email message containing attachments has been archived by a job, where this option **was not checked**, our apps (<u>MailApp</u>, <u>officeGATE</u>, <u>contentACCESS Mobile</u>) will show 0 attachments. However, if you open the original email, the attachments are shown.

contentACCESS Edit 🔺			+ Get more apps
attachments 0		Show original email	Restore original email
1			
E	nail has no attachments		
ContentACCESS Mail app			



If this option **was checked**, but the email was containing embedded email (.msg attachment), this embedded email won't be displayed between the attachments in our apps.

If you want to search for emails, they must be archived and processed by the indexing job before. After clicking on the **Search** option, a pop-up window opens.

7			Search the ar	rchive		
Search in	All mailboxes					~
Keyword	∇					₽ Search
0 document	(s) found in "dne@ta.internal".					
From	Subject	Date 👻	То	Folder	Mailbox	
·						

In the Search in dropdown list, it is possible to select from the following options:

Search in	All mailboxes	~
	Current mailbox	
	All mailboxes	
	Selected mailboxes	



To specify the properties to be searched for, click on the $\boxed{\heartsuit}$ Search refinement icon.

🐺 Search the a	rchiv	re						_		×
Search in		Current mailbox						~		
Keyword	7								₽ Sea	rch
Results		Subject File name Folder Sent date Received date From Sent to Cc Bcc Body Attachment Has attachment Importance Sensitivity Category Size	• •	Date	То	Folder	Mailbox			

After clicking on an option, it will be added to the Keyword list and you can define it.

your vision of technological evolution	4
techarrow	

7		Sea	rch the arch	ive			_		x
Search in	All mailboxes					~			
Keyword	Subject:(text)						۵S	earch	
0 document(s) found in "dne@ta.internal".								
From	Subject	Date 👻	То	Folder	Mailbox				

Sent date, **Received date**, **Has attachment**, **Importance** and **Sensitivity** do not need to be specified manually, you can choose one from the predefined options.

Today
This week
This month
This year
Yesterday
Last week
Last month
Last year
Date

Screenshot : Sent date/Received date options

techarro	ow
Yes	
No	

Screenshot : Has attachment options

Low	Normal	
	Low	
High	High	

Screenshot : Importance options

Normal	
Personal	
Private	
Confidential	

Screenshot: Sensitivity options

It is possible to sort the search results by sender (from), subject, sent date (date) or recipient (to).

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7		Sear	rch the arch	ive			_ □	X
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<dne< td=""><td>RE: Outlook forms testin</td><td>11/3/2017 3:18</td><td>Denius Revis.</td><td>Inbox\Em</td><td>dne@ta.inter</td><td></td><td></td><td></td></dne<>	RE: Outlook forms testin	11/3/2017 3:18	Denius Revis.	Inbox\Em	dne@ta.inter			
<dne< td=""><td>Outlook forms testing01</td><td>11/3/2017 3:17</td><td>Dening Renin.</td><td>Inbox\Em</td><td>dne@ta.inter</td><td></td><td></td><td></td></dne<>	Outlook forms testing01	11/3/2017 3:17	Dening Renin.	Inbox\Em	dne@ta.inter			
noreply@tech-arrow.c	Task 12317 - Click to run	8/30/2017 3:16	marries resile.	Inbox\Em	dne@ta.inter			
noreply@tech-arrow.c	Task 12317 - Click to run	8/30/2017 3:16	marries resile.	Inbox\Em	dne@ta.inter			

It is possible to process the search results further using the <u>context menu</u>.

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Search in All mailbox Keyword $\overline{\nabla}$ Subj 6 document(s) found in " From noreply@tech-arrow.c noreply@tech-arrow.c	es ject:(outlook) 'dne@ta.internal". Subject FW: Outlook forms testin RE: Outlook forms testin Outlook forms testing01 Task 12317 - Click to run Task 12317 - Click to run	Sea Date 11/3/2017 3: 11/3/2017 3: 11/3/2017 3: 11/3/2017 3: 8/30/2017 3: 8/30/2017 3: 3 8/30/2017 3: 2 3 3 3 3 3 3 3 3 3 3 3 3 3	To Open Copy docume Send as attach Send as link Send as ZIP fil Save docume	Folder nt(s) ment e nt(s) locally	Mailbox Pta.inter Pta.inter Pta.inter Pta.inter Pta.inter	Searc	x

Content type selection and metadata fill in SharePoint

In the course of doing business, a typical organization produces many different kinds of content; for example: legal contracts, marketing proposals, product design specifications, manufacturing process documents, etc. Although these different types of documents might share a small set of common properties, each type of content has unique attributes, and each might be created, used, shared, and retained in different ways. An organization might want to maintain different kinds of metadata about these different kinds of content. Content types can be defined for any item type, including documents, list items, and folders.

officeGATE enables for the user to use SharePoint's content type selection and metadata fill directly from Outlook by uploading a document. This feature allows to categorize your documents better and helps to

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save important information about a file for future use. Different content types have different fields (either optional or required).

In officeGATE this option is configurable. The user may configure if he will specify these metadata in case that:

1) the metadata (fields) that are set on SharePoint are **required**, or 2) all the time, regardless the fields are required or optional.

To configure one of these options, open SharePoint site's context menu in the officeGATE pane, and click on **Settings**.



The SharePoint connector settings dialog will open:



SharePoint conn	ector settings	_	X
Settings	Sites		
S 🗲	Url https:// .sharepoint.com	Login	Enabled
	Edit site Delete site	Add new si	te
	\checkmark Show the content type selection dialog only if required fields are present		
		Save	Cancel

Check/uncheck the **Show the content type selection dialog only if required fields are present** checkbox depending on how you would like to use this feature. On the screenshot above we have configured, that we would like to specify these data only if there are required fields present.

Filling the content type and required fields into the "Upload document" dialog

When the user is uploading a file to SharePoint, the **Upload document** dialog will appear and he is prompted to fill in the content types and the required metadata. The dialog will open only if this feature was set in the **SharePoint connector settings** dialog (as described above).

On our illustrative picture below we are uploading (with a simple drag&drop) a file into our **Projects** library on our SharePoint site. We have set to specify the content type only if there are required fields to specify. The **Upload document** dialog automatically opens and prompts us to fill these fields in.







Upload document		—		×
S	List Projects			
Document _{Name}	Remote File archiving(1).docx			
Content type	Manual			\sim
Fields Product Version number *	Manual Document Installation protocol Release notes			
Show the content ty	pe selection dialog only if required	Upload	Ca	ancel

On the illustrative screenshot above there are 4 content types available for the user: **Document**, **Installation protocol**, **Release notes** and **Manual**. The user may select one of these content types. As we are currently uploading a product's manual, we choose **Manual** content type from the list. Required metadata fields are dependent on the selected content type, i.e. different content types have different fields. In case of **Manual** the following fields must be filled in: **Product** and **Version number**. These required fields are marked with a star. If the required fields are not specified, the system will not allow to upload the document into the demanded place. An optional field (such as **Release date**) is not marked with a star, it is up to the user, if he fills it or not. After all required fields are specified click **Upload** to upload your file into the stated library.



Upload document		—		×
S >	List Projects			
Document Name	Remote File archiving(1).docx			
	Manual			
Product	contentACCESS			\sim
Version number *	1.0			
✓ Show the content ty	pe selection dialog only if required	Uploa	d Ca	ancel

Troubleshooting

The vast majority of the problems that you might face during working with officeGATE can be solved with nothing more than a few minutes of your time. Section **Troubleshooting** takes you through the typical operating system problems teaching troubleshooting techniques to decipher any problem, and giving you the skills you need to solve them.

Here you can find some typical problems that might occur and the solutions to them:

> officeGATE add-in does not appear in the right hand panel

When you reopen your MS Outlook it might happen that your officeGATE panel becomes invisible. If you face with this problem, try out the following solution (for better understanding check the screenshot below).



Go to File \rightarrow Options in you MS Outlook. In the Outlook Options window select Add-Ins from the left panel and then click Go at the bottom of the window. You need to make sure, that checkbox for officeGATE is checked in the COM-Add-Ins window, then click OK. Your provider should be visible now.



> SharePoint connection in officeGATE is not established

If the connection to SharePoint cannot be established one of the reasons for it could be that the SharePoint password has been changed on the server. The solution for this is to set this new password in officeGATE, too. For more information how to set SharePoint password in officeGATE click here: <u>Connecting to SharePoint site(s).</u>

What to do if you officeGATE version is not supported by MS Outlook that you have on you PC



The message below that you get when trying to install the officeGATE on your PC means that this version of officeGATE is not supported by your MS Outlook:

officeGATE	- InstallShield Wizard
	The following prerequisites error(s) occured:
	Microsoft Outlook is not installed or Outlook bitness is not supported. (Supported MS Outlook versions are: 2010 32bit, 2013 32bit)
	The setup will now abort!
	ОК

Please download the version of officeGATE which corresponds to the version of MS Outlook that you have installed on your PC.

> What to do if the warning below appears in your MS Outlook?:

î.	ADD-IN PROBLEM	A problem was detected with an add-in and it has been disabled.	View Disabled Add-ins
	TIDD INTRODUCIAL	A problem was acceled with an add in and remas been ababled.	

If you get the warning above and the officeGATE pane does not appear at the right side of your MS Outlook follow these steps:

1) Click on the **View Disabled Add-ins**... button in the warning. **Disabled Add-ins** window will open as on the screenshot below:



Disabled COM Add-ins						
Outlook detected a COM add-in problem						
These COM add-ins decreased performance or caused Outlook to crash.						
officeGATE						
officeGATE an addin created with VSTO technology	1.047 sec	onds				
This add-in caused Outlook to start slowly.						
Always <u>e</u> nable this add-in						
<		>				
	C	lose				

Click on **Always enable this add-in** and click **Close** to close the window. Run you Outlook again and the officeGATE panel will be visible now.